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Billings into a single interface. Best suited for small to mid-sized firms that are seeking an ...

Mary Girsch-Bock • Sep. 16, 2019



OfficeTools WorkSpace Document Management System

OfficeTools WorkSpace

www.officetools.com

From the 2019 reviews of [Document Management and Storage](#) systems for accounting firms.

OfficeTools WorkSpace Document Management System (DMS) is part of OfficeTools, a complete suite that combines CRM, project tracking, and time and billing into a single interface. Best suited for small to mid-sized firms that are seeking an all-in-one solution, DMS is designed to work within the application and cannot be used as a stand-alone document management solution. OfficeTools also offers a mobile app that is compatible with iOS and Android smartphones and tablets as well as an optional client portal.

OfficeTools DMS can be deployed in a variety of ways including on a local

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needs to be completed through OfficeTools, not the computer or server they are stored on. In addition, OfficeTools DMS will also standardize the names of any folders created, making the search process much easier. Users are responsible for creating the categories that are used to store and organize documents, with default categories included, although users can create custom categories if desired.

Designed to work with other OfficeTools applications, users can easily access the DMS directly from the dashboard. To begin the storage process, users will need to create a storage folder, where they will temporarily store documents prior to moving them to a permanent location. Users can use the drag and drop feature to move documents into the storage folder. When ready, users can import all of the documents to the storage folder directly into the OfficeTools DMS, where they can be assigned an archive/delete date. Users can also create subfolders if desired, and the included review option allows users to place documents that need review in a separate area until the review process has been completed.

OfficeTools WorkSpace also offers an add-on portal that integrates with the DMS. The portal sends documents, accepts and processes payments, provides an easy way for customers to schedule appointments, and can track employee time as needed. An e-Signature tool is also available so clients can sign important documents with an electronic signature and upload the signed documents to the portal. The portal can be customized with the firm's logo and other identifying characteristics. For firms not using the portal, documents can be securely emailed to clients as an attachment.

OfficeTools WorkSpace is a completely integrated practice management program that provides users with CRM, project tracking, and time and billing in a single screen, along with the optional Client Portal. A mobile app is also available for both iOS and Android smartphones and tablets. The product also complete integration with all QuickBooks Desktop applications going back to 2007, including QuickBooks

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during regular business hours, with telephone, email, and chat support available. Users can also schedule a remote session with support personnel when necessary. Training videos are also available on demand, and OfficeTools WorkSpace offers a variety of training options including online, onsite, and email training, with pricing varying depending on the type of training chosen.

OfficeTools WorkSpace DMS is a good solution for small to mid-sized businesses that are looking for solid document storage and management capability. Designed to work within OfficeTools , the product is not available as a stand-alone application. Those interested in implementing OfficeTools WorkSpace and the DMS can request a demo or request pricing directly from the vendor.

2019 Rating 4.75 Stars

Firm Management

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