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OfficeTools Cloud and OfficeTools WorkSpace. OfficeTools Cloud combines CRM, project and due date tracking, time and billing, and document management into a single, cloud accessible ...

Mary Girsch-Bock • May. 19, 2020



OfficeTools Cloud and OfficeTools WorkSpace

AbacusNext

www.officetools.com

800-726-3339

From the [2020 reviews of practice management systems](#).

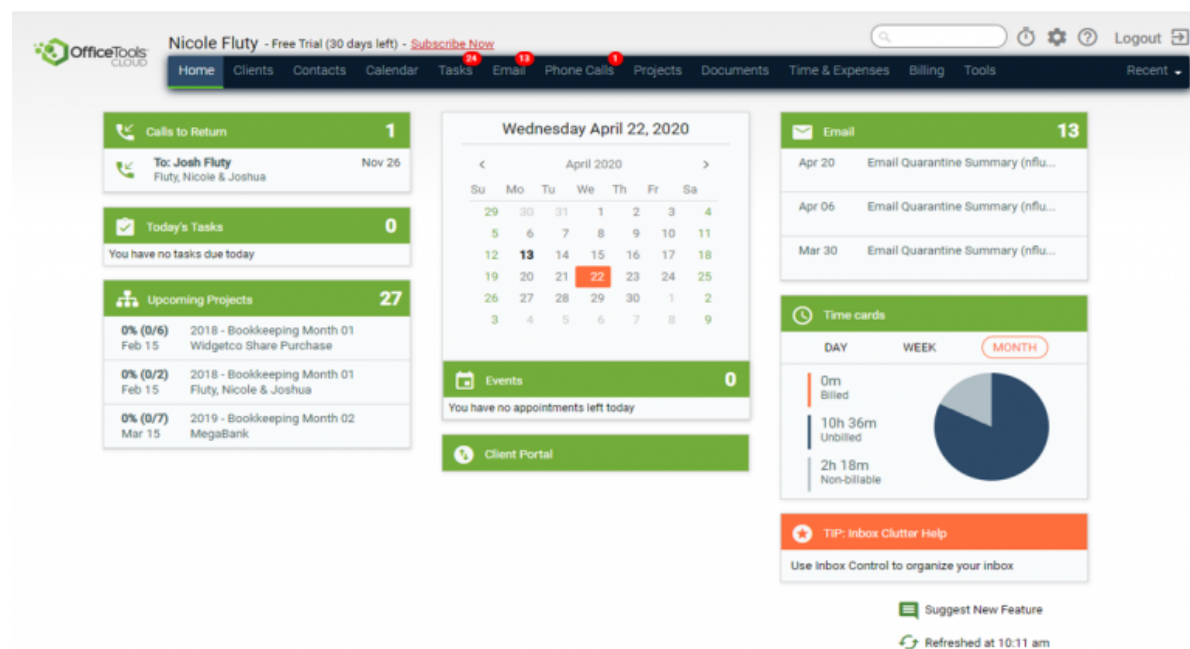
OfficeTools from AbacusNext offers two practice management solutions: OfficeTools Cloud and OfficeTools WorkSpace. OfficeTools Cloud combines CRM, project and due date tracking, time and billing, and document management into a single, cloud accessible application and is best suited for small to mid-sized firms that are looking for an all-in-one practice management solution. OfficeTools Workspace also

includes a mobile app that supports both iOS and Android devices and also offers an

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included.



The time and billing screen in OfficeTools Cloud offers three ways to capture time. Users have a timecard option which is available each time a task has been completed. Users can also use the timer function by clicking on the timer icon. When the task is completed, the timer is closed, and all recorded time displayed to the staff member's recorded time. Users can also access their workflow tasks, open a task and click on the start timer option to record time. Time can also be recorded manually at the end of the day, and all captured time is recapped, with total hours listed, as well as billable hours, and total billable amount.

Before billing, users can view the billable time list, which displays all billable time for each employee, with total hours and total amounts, as well as any WIP totals. Fixed fee, value billing, recurring billing, and progress billing options are also available, with an option to enter any adjustments to billable time if desired. Users also have the option to create invoices when they wish, and can choose to invoice all

time recorded, or check off the billable hours they want to include in an invoice.

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OfficeTools Cloud includes staff workflow, with users able to access upcoming tasks as well as those of other staff members. This is a great tool for managers who are looking to assign projects and tasks to staff while ensuring that they're not currently overloaded with work. Workflow displays can be set to show a specific time frame, so managers can view workflow for a single day, or view workflow for the week or by a specific date range.

One of the major bonuses of using OfficeTools is the document management feature, which allows users to easily manage all documents from a single location, with the ability to easily share documents with clients via the optional client portal. An e-Signature tool is also available in WorkSpace so clients can sign important documents with an electronic signature and upload the signed documents to the portal.

OfficeTools Cloud offers excellent reporting capability with Billing, Staff, Contact, Schedule, and Project reports available. There are also a variety of timesheet reports available that can be accessed directly from the Time tab at the top of the screen. The reports interface offers a variety of formatting options and clicking on a report category will display a list of available reports to choose from. Users also have the option to create a report, and save the report for future use. All reports can be viewed on screen, printed, exported to Microsoft Excel, or saved as a PDF.

OfficeTools Cloud offers integration with QuickBooks Online, while OfficeTools Workspace integrates with QuickBooks Online and Desktop, Lacerte and has APX. OfficeTools Cloud also integrates with Microsoft Exchange as well as APX for quicker online payment.

OfficeTools Cloud offers a variety of help and support options including multiple webinars and guides that are easily accessed from the vendor website. Product

support is available during regular business hours, with support accessible via

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monthly.

2020 Rating 5 Stars

Strengths:

- Extremely easy to use
- Offers both cloud and on-premise deployment
- Includes a client portal

Potential Limitations:

- Can be expensive for firms with multiple users

Firm Management

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