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application which offers a comprehensive suite for managing a small firm including workflow management, client portal, document management, and light customer relationship management (CRM).

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Practice Management 2014 by Office Tools Professional is a time and billing application which offers a comprehensive suite for managing a small firm including workflow management, client portal, document management, and light customer relationship management (CRM). Because the application includes so many different functions needed in a small firm, this application is frequently reviewed along with time& billing software, document storage applications, client portal tools, as well as customer relationship management.

New for 2014 is AIMI (Alert & Instant Message Interface), which allows users to securely send each other instant messages, track time in timers, and transfer files to others. The software is oriented around a single screen interface broken into three work areas. The left side of the home screen shows a client listing which may be filtered to show current task assignments.

The rest of the screen shows detailed information for the currently selected client,

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enough commitment to effectively implement the culture change that goes along with implementing customer relationship management. Firms should have a well thought out vision for the role of CRM in their organization prior to trying to implement this product.

### **Product Functions/Features**

Project tracking is included with the software and allows multiple steps users and time periods to be associated with each project. As work is completed, users simply mark each task as done, where employees are asked to enter the associated time and expense data. Users can post time manually or employees can use multiple automatic which will capture time as users perform tasks. The to do list associated with a project can be saved as a template and reused for similar engagements within the software.

### **Integration**

Practice Management 2014 includes support for Dymo label printers which can be used to automatically generate address labels and file folder labels from the data within the software. The company has created productivity tools for those who work with a wide range of common CPA firm applications, including QuickBooks, Lacerte Tax, Microsoft Outlook, Microsoft Excel importer, and an interface for use with Intuit's DemandForce marketing and professional services automation toolkit .

### **Help/Support/Training**

All updates and technical support are included with practice management 2014 and covers any problems with installation product related issues. Multiple user guides are accessible from the in program help menu and cover most common user and administrator issues. The company has created a number of videos over the last few

years which assist users with common problems in the software. Training is not

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user package is \$1,600 and a 10 user package is \$2,900. Client portals are priced starting at \$360 for a 5 GB monthly package, and users can either subscribe to video training or create a personalized custom training program based on hourly rates.

**Best Fit:** Firms from 2 to 50 who need an integrated tool for storing and retrieving documents, staff workflow, time and billing, and light CRM capabilities. Practice Management 2014 is particularly well suited for firms who want to Increase the effectiveness of their communication between members of their team and those who wish to make it easier for administrative staff and paraprofessionals to answer routine client questions.

## Strengths

- Practice Management 2014 from Office Tools Professional offers a wide range of features, and is the only application included with this review which integrates time tracking, billing, light CRM capabilities, work status tracking, document storage, and a client portal into a single solution.
- The application can run on a local server or be provided as a hosted solution from a number of commercial hosting companies.
- New features include an alert and instant messaging interface for communication within the firm, as well as integration with Intuit's DemandForce marketing and communications application.
- Practice Management 2014 now includes a AIMI (alert and instant messaging interface). This solution makes it possible for team members to send each other instant messages from within the application.

## Potential Limitations

- Practice Management 2014 is designed as a single integrated application to accomplish multiple tasks within a firm.

- Prior versions of the application have required a high end computer (Core i7

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