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Office Tools Workspace Document Management System

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small to mid-sized firms that are looking for a comprehensive practice management/document management solution.

Along with complete practice management and document management capability, Office Tools Workspace also offers an add-on client portal that can be purchased separately.

Office Tools Workspace DMS offers a variety of deployment options including onsite installation on a desktop system, installed on a local server, or hosted in the cloud. Office Tools Workspace DMS supports multiple file formats, with all documents automatically saved in their native format. The product also includes a PDF print driver that provides users with the ability to convert any file to a PDF.

Office Tools Workspace DMS foregoes the traditional Windows tree structure, using a simplified list option to store documents. The folder structure is created by Office Tools Workspace, with users simply assigning each document to a specific category. The product includes a list of default categories that can be used to store documents, but firms have the option to create custom categories as well.

Office Tools Workspace is a completely integrated application, so users can access the document management application from the Documents option on the main product dashboard. Users will need to create a drop folder, where all documents will be placed prior to storage. After the folder has been created, users can save all documents directly to the drop folder, or use drag and drop functionality to move documents into the drop folder. Any scanned documents can also be saved directly in the drop folder as well. Any document that is saved in the drop folder will be imported into Office Tools Workspace DMS and place in the Document Management Folder. Documents can be assigned an archive/delete date, with all files moved to the Document Archive Folder at that time. Users can also create subfolders to be used with the name folder and can also include document category in the subfolder

structure. A review option is also available that allows users to place documents that

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Firm Time Sheets. For firms that do not use the portal option, any document stored in Office Tools Workspace DMS can also be securely emailed to recipients as an attachment.

Office Tools Workspace DMS is part of the Office Tools Workspace practice management solution, with an optional portal available. Office Tools Workspace integrates with a variety of third-party applications such as QuickBooks Desktop, Intuit Profile, Lacerte, and Microsoft Excel and Outlook. Integration is also available with Google Maps, Yahoo, and MapQuest, and a new Microsoft add-on toolbar allows users to easily save all Microsoft files directly in Office Tools Workspace DMS. Using the Excel Importer feature, users can import contact information from any third-party tax software application directly into Office Tools Workspace DMS. Also offered is a PDF print driver, which allows users to easily convert and save documents as a PDF for more security, particularly during document sharing and transmission.

Office Tools Workspace DMS offers users a variety of help tools and resources such as a comprehensive knowledgebase that includes a variety of user guides, a pre-recorded product demo, product setup instructions, and FAQs. Product support is offered during regular business hours, with telephone, email and remote support sessions available. Both online and onsite training is available, and the Office Tools Workspace website also offers training videos and access to webinars.

Office Tools Workspace DMS offers small to mid-sized accounting firms an excellent document management/storage solution. Office Tools Workspace DMS is not available as a stand-alone application, but is coupled with a comprehensive practice management application. Those interested in Office Tools Workspace DMS can contact the vendor directly to request a demo or inquire about pricing.

2018 Rating 4.75 Stars

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