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OfficeTools WorkSpace Document Management System

www.officetools.com

From the 2020 reviews of Document Storage and Document Management systems.

OfficeTools WorkSpace Document Management System (DMS) is part of OfficeTools, a practice management application that combines CRM, project management, and time and billing into a single application. The DMS offered in OfficeTools is part of the main application and is designed to work exclusively within the application, and is not available as a stand-alone document management application. OfficeTools offers two plans, OfficeTools Online, which is practice management on the cloud, and OfficeTools WorkSpace, which integrates with tax preparation applications, making it a terrific option for accounting professionals.

OfficeTools DMS can be deployed on-premise or hosted in the cloud. The application also includes a mobile app that works with both iOS and Android smartphones and tablets, with an optional client portal available as well. OfficeTools DMS supports

numerous file formats, with all documents stored in their native format. There is an

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process has been completed.

An add-on portal is available that integrates with OfficeTools DMS, which offers secure file sharing as well as the ability to accept and process client payments. The portal can be branded to fit any firm. For those not using the portal, OfficeTools DMS includes an option to email documents to clients as an attachment.

OfficeTools DMS integrates with a variety of third-party applications including all QuickBooks editions, as well as Lacerte Tax. Other integrations include Microsoft Word and Excel, and APX, which can be used to create invoices.

OfficeTools WorkSpace DMS is not available as a stand-alone document management application, so those interested should be using OfficeTools Cloud or OfficeTools WorkSpace. OfficeTools Cloud starts at \$49 per user/per month, and pricing for OfficeTools WorkSpace is available directly from the vendor.

Strengths:

- Both on-premise and cloud accessible applications available
- Offers a mobile app for both iOS and Android devices
- Includes an add-on portal option

Potential Limitations:

- Is only available for OfficeTools users

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