# WHO'S WHO

## AMONG THOSE SERVING THE TAX & ACCOUNTING PROFESSION

**Office Tools**
PROFESSIONAL

### PRACTICE MANAGEMENT

**Office Tools Professional**
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**Website:**
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**Email:**
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**Year Founded:**
**1997**

**Price:**
**$600/First User,**
**$300/additional users**

## COMPANY OVERVIEW

Serving the accounting profession for over 15 years, Office Tools Professional is a proud developer of the most integrated practice management software in the accounting market. Receiving many accolades as the best solution for the small to mid size firm, *Practice Management Software* has become the Accountants choice. Awards include two consecutive years *CPA Practice Advisor* "Reader's Choice Awards" for superior workflow software and K2 Enterprises Best Practice Management software.

In our culture it's all about resources. We recognize that to really serve our industry we need to provide the necessary resources to our users. These resources are not limited to our software but include an annual Practice Management conference and our Publication.

The annual *Technology and Practice Conference* includes our User Training and brings together today's thought leaders and industry vendors to resource our attendees. It is also a great opportunity to learn how to use all *Practice Management Software* features. Every attendee will receive training and a chance to network with other professionals, sharing common problems and exploring new solutions in a round table format and panel discussions.

*My Office Today* is a publication that specifically targets small business owners, who feel isolated and lack the resources bigger firms have. My Office Today focuses on relevant topics which are released on our website in blog, video, and print format.

## PRODUCTS

As a leader in small office software, we focus on developing software with tools that solve specific problems for the accounting firm. Our unique "Workflow Methodology" uses a single interface that provides access to nearly every office task and function, thus solving client, staffing and workflow problems while providing the following benefits:

- seamless integration
- simplified management
- improved delegation
- increased productivity

Added last year was our client document portal, Client Portal. This portal allows Practice Management users to send confidential documents, messages, invoices and receive payments to clients via a secure portal.

Office Tools Professional has always realized the importance to synchronize data between other software that is used in the office. Import is now available for ALL tax programs.

*QuickBooks® Integration Tool -* The sharing of critical data like customers, employees, vendors and item codes, enables users to save time and reduce the chance of data entry errors, eliminating duplicate entries between programs. The export time cards option allows you to create payroll for your staff and bill your clients. Utilize all the workflow benefits including billing and tracking A/R in *Practice Management Software*, taking advantage of incredible reporting and metrics, while synchronizing data with QuickBooks.

*Microsoft® Outlook Integration Tool -* Integrate Microsoft Outlook calendars, contacts and tasks from Office Tools Professionals schedules, contacts and tasks. Sync in real time all information. Bring in Outlook Email for review, reading and storing in the document management system. This feature works with Outlook and Exchange.

*Lacerte® Integration Tool -* Import your data from Lacerte or sync it with your existing contacts. Enter new contacts in Lacerte and import them with any changed contacts into Office Tools Professional. Any changes to a contacts' information can be sent from Office Tools Professional to Lacerte. Choose which method works best. You can also transfer over spouse, dependents, partners and other related records.

Additional integrations available:
- Demandforce Integration
- ProFile (Canadian)
- Microsoft® Excel Data Import Tool – Import from any tax program
- Adobe Acrobat® Toolbar Add-on
- Microsoft® Office Toolbar Add-on
- Laser App®
- Dymo® Label Printer Integration
- Google Maps® Integration

## MARKETS SERVED

With over 10,000 users Practice Management for the Accountant is easily integrated into any accounting firm whether you are a CPA's, EA's or t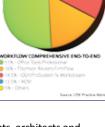ax and bookkeeping professional. Other service professionals such as consultants, architects and attorneys can easily adapt Practice Management to their specific needs too.



WORKFLOW COMPREHENSIVE END-TO-END
- 51% - Office Tools Professional
- 16% - Thomson Reuters/FirmFlow
- 14.5% - OGmProSystem fx Workstream
- 13.5% - XCM
- 5% - Others

Source: CPA Practice Advisor

## CUSTOMER SUPPORT

Office Tools Professional success and growth is built upon exceptional client care. Professional support personnel are available during regular business hours at no charge to end users. We pride ourselves on having a courteous representative answer your questions directly, without having to wait for a call back. Superior customer support has allowed us to achieve a 95 percent customer retention year after year. With have nearly 600 active members in our LinkedIn Group, customers can speak with each other to learn and solve problems while understanding how firms across the globe run their practice. Users can purchase Practice Management software by the Month, Semi Annual or Annually. We are also the only industry vendor that allows a reduce cost tax season license. Purchase this year and find out what our user have known for some time; a firm changing experience that increases billings and reduce costs.

**Office Tools**
P R O F E S S I O N A L

THE ONLY PRACTICE MANAGEMENT SOFTWARE FOCUSED ON
# POWERFUL · SEAMLESS · COMPLETE
# INTEGRATION
WORKFLOW · STAFF · DOCUMENTS · EMAIL · CRM · TIME · BILLING · PORTALS

TO SEE THE COMPLETE SOLUTION FOR YOUR FIRM VISIT:
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