Feature Comparison

The following table compares the features in OfficeTools Cloud to the features in OfficeTools Workspace.

Feature	OfficeTools Cloud	OfficeTools WorkSpace
Dashboard		
Home Dashboard	✓	
Client Features		
Unlimited Client Custom Fields	✓	
Client Workflow Tracking		
Project Tracking	✓	✓
Tasks, Phone calls, Documents, Client emails & Invoicing	✓	✓
Staff Workflow		
Integrated Email	✓	
Calendar	✓	✓
Personal Dashboard	✓	
Calendar		
Integrated with Exchange	✓	
Outlook / Exchange Sync		✓
Automated text / email Appointment Reminders		✓

Feature	OfficeTools Cloud	OfficeTools WorkSpace
Integrated Email		
Email in OfficeTools platform	✓	
Email Synced to OfficeTools platform		✓
Projects		
Practice Automation	✓	
Bulk Completion of Projects		✓
Bulk Manipulation of Projects		✓
Budget by Task / Assignment		✓
Progress & Budget Alerts		✓
Portal		
Document Transfer	✓	✓
Client Appointment Requests		✓
Invoice Upload & Client Can Pay Online	✓	✓
Client notes	✓	
Documents and Storage		
Document Versioning	✓	
Machine Learning: Auto Tagging, Summarization, OCR	✓	
Signature		✓

Feature	OfficeTools Cloud	OfficeTools WorkSpace
Integrations		
QuickBooks Online	✓	✓
QuickBooks Desktop		✓
APX	✓	✓
APX Pay Now Link	✓	✓
DropBox	✓	
Exchange / 365	✓	✓
Lacerte		✓
Canon		✓
Crexendo		✓