

## **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	<b>~</b>	
Client Features		
Unlimited Client Custom Fields	<b>~</b>	
Client Workflow Tracking		
Project Tracking	<b>~</b>	<b>~</b>
Tasks, Phone calls, Documents, Client emails & Invoicing	<b>~</b>	<b>~</b>
Staff Workflow		
Integrated Email	<b>~</b>	
Calendar	<b>~</b>	<b>~</b>
Personal Dashboard	<b>~</b>	
Calendar		
Integrated with Exchange	<b>~</b>	
Outlook / Exchange Sync		<b>~</b>
Automated text / email Appointment Reminders		<b>~</b>

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

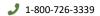
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Feature	OfficeTools Cloud	OfficeTools WorkSpace
Integrations		
QuickBooks Online	<b>~</b>	<b>~</b>
QuickBooks Desktop		<b>~</b>
APX	<b>✓</b>	<b>~</b>
APX Pay Now Link	<b>~</b>	<b>~</b>
DropBox	<b>~</b>	
Exchange / 365	<b>~</b>	<b>~</b>
Lacerte		<b>~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



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