

OMS Accounting Practice Software Suite

Subject Line: Improve Performance, Reduce Costs, and Increase Profitability

Accounting Practice Software package should do more than just *crunch the numbers*. It should help you manage your practice and capitalize on organizational synergies. It should allow you to organize your client profiles, allocate workflows, and provide comprehensive reporting on key revenue and profitability drivers.

It should do that, and now it can with the OMS Accounting Practice Software Suite.

This Office Management System (OMS) offers accounting professionals the ability to optimize and streamline practice administration for greater efficiencies. Greater efficiencies lead to cost savings, improved client relationships, and higher profit margins.



Designed by Accounting Professionals

The OMS Accounting Practice Software Suite offers these valuable cost-saving tools:

- Document storage and retrieval at your fingertips
- Establish, monitor, and track staff workflows
- Automatic auditing of workflows
- Reduce downtime and unbillable project hours
- Synchronized, single-source data storage ensures no task is left incomplete or duplicated
- Faster project completion times and improved controls
- Core functionality needed for *efficient practice management* without the little used features that serve to complicate matters in other software packages

OMS has a simple, transparent pricing plan that makes it more affordable than other accounting practice management solutions. Its ease of use is ideal for small practices and its power allows partners and managers to streamline performance across multiple locations.

Contact an OMS Consultant today to learn how our accounting practice management solution can revitalize your organization. Or visit our website for a free demonstration.

Subject Line: Eliminate Redundancies to Increase Practice Revenue

How can we eliminate redundancies to increase your accounting practice revenue? By streamlining your administrative and management functions so you have more time to pursue new clients. Or to upsell your current clients who become thrilled with the increased level of service you provide.

OMS was designed as a one-stop solution for all of your accounting practice needs. It allows partners, managers, and staff to automate routine tasks with maximum efficiency. This efficiency frees up valuable work time to focus your efforts where they are most profitable...*on the revenue-generating portion of the business.*



The OMS Accounting Practice Suite automates client administrative functions such as:

- Document and Content Management
- Automatically generate 64-8, CT41G and CWF1 forms.
- Manage and delegate client workflows to staff
- Customer relationship management (CRM) for easy access to relevant client information for each staff member
- Password protection to ensure confidentiality
- Fast, accurate invoicing/billing procedures including WIP progress billings
- Deadline management to ensure on-time results
- Timesheet entry for billable and unbillable hours
- To-do lists and messaging activities

It's not enough, anymore, to simply crunch the numbers and submit the results to clients. Accounting professionals today are required to help manage their client's business. It's crucial to your client's growth and profitability. Your client's profitability is your profitability. The OMS system organizes your client's data to allow for easy access and comprehensive reporting...*all at your fingertips.*

As one of our clients told us "*the OMS team have understood what challenges practices like ours are facing, the software is very easy to use and required little training*" – Richer & Co. Chartered Accountants.

Contact an OMS Consultant for more information on how to improve efficiencies in your practice and spend more time on revenue-generating activities.

Subject Line: Focusing on the “Service” in Client Services

When the subject of purchasing an accounting practice software solution arises, it is often followed with the usual objections for not moving forward. Statements such as “*we can’t afford it*” and “*now is not a good time*” are thrown around the room.

That’s understandable. The economy is still shaky, although recovering. Profits have been squeezed, so many practice partners and managers are watching their bottom line carefully.

That’s precisely the reason the OMS Accounting Practice Software suite was developed. To streamline operations and reduce the heavy administrative costs associated with running a successful practice. Less time spent on routine tasks opens a whole, new world of opportunity to implement a customer service and marketing strategy.



Client Relationship Management (CRM)

With that in mind, the OMS software solution was developed to wrestle with the large volumes of data and to automate routine administrative functions. Accounting practice partners and managers can then be free to provide value-added services to their clients in addition to targeting new business.

We’ve made it easy to improve client relationships:

- Secure client relationship management with password-protected levels of access to ensure confidentiality
- Single source document management and storage for easy retrieval at a moment’s notice – even while you are speaking with the client on the phone
- Comprehensively track and monitor all internal and client related correspondence
- Manage and delegate client workflows
- Design your own business questionnaire templates for different client types to meet firm and regulatory requirements
- Simple yet powerful search facility – allows you to instantly search for any client, individual, documents and/or messages through just a single dashboard.
- Fully integrates with Microsoft Outlook to enable you to convert actions into emails, import emails into actions, and book appointments.

Add to that our simple, affordable flat pricing structure and *second-to-none* support strategy, and you can see why you can’t afford to pass up the opportunity to learn more about this package. Contact an OMS Consultant for more information on how to improve efficiency in your practice and spend more time on revenue-generating activities.

Subject Line: Automate Your Accounting Practice Workflows

At OMS, we're well aware of the challenges that accounting firms are facing in today's marketplace. After all, we grilled accounting professionals when developing our software suite for exactly that type of information. The result is a comprehensive software solution that will become one of the most prized assets in your accounting practice.

Cost Savings and an Efficiently Run Accounting Practice

- How much staff time is wasted searching for misplaced client information?
- Are there tasks that are sometimes overlooked or duplicated?
- Do you have a weak link in your practice workflow?
- Do inter-office communications sometimes become *lost in the shuffle* resulting in key assignments being missed?



Improve Client Relationships and Increase Revenue

We understand that delivering the final product to the client is an important component of accounting practice management and OMS is the tool to ensure that happens...*on time, every time*.

It allows partners, managers, and staff to complete routine tasks with maximum efficiency. An efficiently run practice frees up valuable work time to focus your efforts on building and establishing client relationships. **You can see how this efficiency can result in more sales and higher profitability.**

OMS accomplishes this by:

- Managing and delegating client workflows to staff
- Enabling contact relationship management to allow easy access to relevant client information for each staff member
- Comprehensive tracking and monitoring all internal and client related correspondence
- Offering fast, accurate invoicing/billing procedures including WIP progress billings
- Utilizing deadline management to ensure on-time results
- Fully integrates with Microsoft Outlook to enable you to convert actions into emails, import emails into actions, and book appointments.

We've been able to keep our prices reasonable by not developing seldom-used features that only serve to drive up the price. Our accounting practice advisors stressed to us to keep it simple and functional when developing the software suite. OMS is easily integrated into existing practice networks.

Contact an OMS Consultant for more information on how to improve efficiency in your practice and spend more time on revenue-generating activities.

See what our clients are saying about the OMS Accounting Practice Suite:

"Our firm purchased OMS over two years ago and have found it to be an excellent and reliable system. It has aided the cohesion of our practice and has helped to improve our efficiency. The diary/actions system is also excellent" – Dewey, Cheatem, and Howe CPA

"Moving to OMS was a breeze. Our previous practice management system was really a bolt on to the accounts production and constantly required a lot of data input and training. We just could not keep up. With OMS, all the staff, right from trainees to managers got to grips with it straight away" – Cooper, Young, and Bradshaw CPA Tax Consultants

Speak with an OMS Consultant today to discuss the ways our software package can improve your client relationships.

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