866-999-1366

www.accountantsworld.com

From the September 2012 review of time and billing systems.

Best Fit: Small practices seeking a fully web-based suite that includes time and billing functions, along with optional add-ons for write-up, client bookkeeping, payroll, document management and their firm's website.

Strengths

- Full integration with other programs in the AccountantsWorld suite
- Intuitive web interface and anywhere access with mobile app
- Client communications tools, calendaring and client portals

Potential Limitations

- Invoice customization options are limited
- No attaching of scanned receipts to expense entries
- Minimal project management capabilities

AccountantsWorld was one of the first developers of web-based solutions for public accounting professionals, offering a full suite of cloud solutions for full accounting with write-up and trial balance, payroll, payroll compliance, document management and website building, in addition to the Practice Relief time and billing solution reviewed here. The system can be used either as a part of the Power Practice Suite or as a stand-alone system.

Practice Relief includes accounts receivable management, time tracking, invoicing

into an interface with a menu bar across the top for accessing core system areas, such as time tracking, billing, a built-in scheduler, reporting, an email utility, program setup functions and firm management utilities. When selected, each of these areas provides menus of specific tasks the user can jump to.

Additional links, which stay present on all system screens, show the user if any messages or notes have been sent to them, and access to help functions. Client and staff data selection screens include selection lists for client codes, status and several additional fields, with options for managing retainer/trust clients.

Time Management Capabilities: 4 Stars

Practice Relief's time tracking functions allow for entry either on a multi-task spreadsheet view or by transferring information from the built-in calendar function. The task entry spreadsheet view shows all entries the user has made for a selected day for all clients, and the user can simply add new entries to this list on the fly. A task list view that offers a similar screen, gives users the ability to filter by date range, client, staff or specific tasks. Firm management can also view the activities of multiple firm staff at the same time.

Practice Relief also offers the Time Tracker utility, a timer tool that can be run separately from the web-based system, giving users an additional method of quick entry that can be even when mobile or offline, and then have the data synced into Practice Relief when back in the system. The system has limited project management capabilities, but separate engagements for a client can be managed by entering them as separate clients.

For client management functions, selection screens make it easy to quickly drill down into a client's details, histories and other data, with the ability to email directly from the program. An email broadcast function can be used to send individual or batch invoices or reports to clients, and can also be used to easily create

Expense entry screens are similar to time screens, with users able to bring up a spreadsheet view of items they've entered previously for clients. From this screen, new entries can also be made and applied to clients, with optional entry of notes, but no ability to attach scanned receipts.

Users with appropriate access rights can create client invoices by transferring in tasks and expenses that have already been entered, by adding task entries directly to a new invoice, or by billing against a client's retainer. Limited customization options allow adding a firm logo, header and footer settings, and determining whether or not to print or cloak notes, hours, rates or tax codes. Finalized invoices can be printed or emailed from within the program.

Client reports include an accounts receivable focused aging report, as well as client realization, client rankings, tasks, and summary and detail activity. The program offers an Invoices List for basic accounts receivables overviews, but does not provide collection-focused AR functions or purchase order management. These and other related functions can be found in Accounting Relief, which integrates with Practice Relief.

Management Features: 4 Stars

In addition to the aging and client-specific reporting mentioned previously, Practice Relief offers staff and firm focused options that enable evaluation of staff productivity, profitability of specific tasks, firm performance, invoice summaries and other details, which can be set across a user-defined time frame for period comparisons.

These reports can be easily accessed by managers to use as a quick summary of firm data, but true dashboard views and graphical display of key business indicators are not available. The system's user access setting enable access or restriction to key areas of the program, and individual clients can be made accessible to only specific

Reports and invoices can be saved to Word, Excel and text files, and client data can be imported from Excel. The system's appointment calendaring system synchronizes with Microsoft Outlook.

As a web-based system, Practice Relief can be accessed from anywhere that a user has connectivity, and the time tracker utility can be used even without internet access, with data synched back into the program later. A mobile app called the Time and Expense Tracker is also available for iPhone, iPad and BlackBerry users.

Help/Support: 4 Stars

The system includes task-specific help options, while the company's website offers a blog, whitepapers, webinars and options for viewing program tutorials or contacting technical support via a web form. Both live and web-based support are included in program pricing.

Since the program is fully web-based, all program updates are automatically performed by AccountantsWorld, with no action required by firms or users.

Summary & Pricing

Practice Relief seems designed for smaller practices from one to about 10 users, but can handle more. Its time and expense tracking features are easy to use, and the web-based nature of the system makes it suited to frequently mobile professionals. Its feature set is more comprehensive when combined with other programs in the Power Practice suite.

Firms can use the system for $40 per month on a month to month basis, or for a discounted annual rate of $395. Either method supports any number of firm users and clients.

2012 Overall Rating: 4 Stars

Sponsors: