#### **CPA**

#### Practice **Advisor**

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#### www.cmrometa.com

**Best Fit:** Professionals and firms seeking automated time keeping, whether for time-based billing or productivity management.

#### Strengths

- Automatically tracks tasks a user performs on a computer and assigns to projects
- Multiple integration options for online accounting systems and other programs
- Completely web-based allows anywhere access and no IT requirements
- New apps for tracking calls and work on mobile devices
- Email time tracking for Outlook and Gmail

#### **Potential Limitations**

- Base level client management functions
- Limited invoicing options, but integrates with third party billing systems

Chrometa is a unique system that essentially watches over your shoulder at what you're doing on your computer and even your mobile devices; After you've given it permission to do so, of course. This can save a lot of the time and headache involved in timekeeping, particularly for those who wait until the end of the day or end of the week (or worse) to compile their activity and time logs. With this program, the user can bring up their activities for the day, assign them to appropriate clients or projects, and then invoice the client.

Time spent on calls or working on mobile devices can also be tracked, as well as email activities in Outlook and Gmail, and data from multiple users at a firm or business can be tracked by an administrative user. The system can export to several formats and integrates with several popular accounting systems.

**Basic System Functions: 4.25 Stars** 

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window and an Excel spreadsheet open. It logs them by title of the document or page, but does not look at the details of each. I could then assign the time spent on each of those tasks to a client or a client project for billing.

The system can be used by any number of staff. While not specifically designed for any profession or industry, it can be beneficial to pretty much any type of services professional or firm because of the accuracy of the details it tracks. With it running, users will know exactly what they were doing during a given time period, and for exactly how long.

The primary web-based screen opens to a summary view, which shows tasks for the day, week, month or other time period, and allows users to add entries, move them to projects, or perform billing functions. Views are also available showing a timeline of all activity, as well as graphical displays of time spent on tasks.

# Time Management Capabilities: 4.5 Stars

Chrometa time tracking functions are automatic, with no action required by users (except for the initial installation), which means no timers to start or stop, although users can pause time tracking or turn it off, if they choose. Users can also enter manual task entries, since not quite every work activity takes place on a computer (meetings, travel, etc), and the entries, both manually-entered and automatic, can then be assigned to clients or projects. The system also has an optional feature that notes when a computer has been idle for an extended period and can prompt the user to make an entry for that time when they return.

Once a specific work activity, such as a spreadsheet named "ABC Trucking Aug. 2012," has been assigned to a client or project, the system then remembers that assignment and if the user works on that spreadsheet or task again, it will be assigned automatically to that project. Additional rules can be created for automatic

assignment of tasks to projects, and this functionality can extend to virtually any

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#### **Invoicing Functions: 2.75 Stars**

Chrometa's invoicing functions are pretty basic, but they've only recently started adding to the functionality. The default invoice format pulls in selected client project work activities that users want to include on an invoice, then users can add notes to line items or to the overall invoice. From there, users can print, email or export the invoice to Excel or PDF. Invoices allow almost no customization. The system's multiple integration options, however, also enable users to export the data into other programs for more advanced invoicing and budgeting options.

While there is not a true accounts receivable module, the system does offer a search function that can bring up invoices that are currently open, past due, paid or cancelled. Since the program is focused on time tracking, it does not offer the ability to add sales taxes, expense tracking or an intuitive way to add expenses to an invoice.

### **Management Features: 3.75 Stars**

Chrometa's Team feature allows a supervisor to manage multiple staff member's timesheets, with the team leader having ownership of the clients and projects, and then sharing them with other selected staff. These personnel can then apply their tracked or manually entered tasks to these clients and projects. This acts as a single-level approval process, where the supervisor can edit, write up or down entries, mark some activities as non-billable or perform other functions.

Users can access graphs of work activity performed per user, client or project, and team leaders can view all activities by users that have been assigned to clients and projects. Only items that a user has opted to assign to a client or project are viewable to the supervisor of that client or project. This means that tasks for other groups or clients, as well as personal tasks, are not shared.

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Chrometa's secure servers for a period of a couple weeks to 12 months, depending upon the level of service the user is subscribed to.

### Help/Support: 4.5 Stars

As a web-based system, all of Chrometa's in-program help utilities are online, with the help button opening the company's support center. This site includes tips and guides for setting up the program on a computer and mobile devices, capturing time, creating project rules, invoicing, team time tracking and other functions. Also available are video tutorials and access to a community user forum. Live phone-based support is included in pricing, and technical support can also be handled online through a virtual support desk.

# **Summary & Pricing**

For accurate and almost hands-free time tracking, Chrometa is exceptional, monitoring virtually everything performed on the user's computer (when Chrometa is turned on), and providing incredible detail. Also handy is the ability to set rules that allow the system to automatically assign certain tasks to specific clients or projects. The system's invoicing and management functions are pretty basic, but for firms or individual professionals wanting an accurate assessment of their work activities, Chrometa is unsurpassed. The system is offered in tiers priced at \$19, \$29 and \$49 per user per month, with increasing functionality, exporting, number of devices and data storage at the higher levels.

# 2012 Overall Rating: 4.25 Stars

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