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From the October 2005 [Review of Mid-Range Accounting Software](#)

CaseWare Time and Today 2005 is a thorough time, billing and practice management

software package complete with contact management, extensive project and staff reporting, and scheduling. The design of the software is primarily for accounting firms and other professional service firms in need of billing, staff and office management, and aims to complement other CaseWare products for accountants.

Ease of Use/Flexibility — 5 Stars

CaseWare Time 2005 offers a wide array of management tools with an extremely easy-to-learn interface. In just a day's time, you could set up a firm, have security enabled, add staff, begin entering clients, and have workers start their timekeeping. One of the best features is its well-designed layout. Users have easy access to reports and timekeeping on the left, while the Help section sits on the right. This Help section is already divided into the most common practices, making it very easy to find what you might need. Some programs have a large number of pop-up windows for each process, but CaseWare has implemented an Explorer-like browser feature that allows the user to go forward or back through their "history" of processes. The windowing layout provides easy drag-and-drop functionality — if a user would rather have the Document Manager sit on the right, he or she simply has to drag it to the right.

The User Profile Toolbar provides a good number of filtering options for input into reports. For time and billing, work codes can be set up into separate classifications, and clients can be put together into groups. Documents already exist for reporting

on each, and all data is updated in real-time. Do you have a large number of

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in this product, but they will find it easy to grow into the capabilities. Larger firms may need more reports and documents, and those can be created relatively quickly. If a firm suddenly experiences rapid growth, a well-planned implementation will handle the growth. For the purposes of this review, a newly created company was up and running with timekeepers in under an hour; invoicing in two hours. If a firm suddenly finds it is working in a new area of expertise, categories and work codes can quickly be added to ensure that all hours are tracked and billed appropriately.

Productivity Tools/Features — 4 Stars

If staff members regularly work out of the office, an option exists to check out files. When they return, those files can easily be checked back in. Unfortunately, there are no integrated online capabilities. However, the CaseWare Today add-on provides a wealth of tools. Today is an add-on for Microsoft Outlook, giving an additional dashboard that summarizes upcoming meetings, news and calendar items. Bi-directional synchronization with Time is relatively easy to set up, and the dashboard can be configured to provide information about performance metrics, training and knowledge centers, and clients. Neither CaseWare Time nor Today are intended to be complete project management tools; firms would be required to have a separate group calendaring system such as an Exchange Server, and web research tracking would need an independent system. CaseWare Time allows for the creation of multiple billing timers that can be used for quick tracking and billing of phone calls, meetings or research. The Document Manager could be configured to track documents related to a particular client or project, and default reports, Word documents and Excel spreadsheets can be posted to those folders. Firms with limited ongoing projects may appreciate this approach.

Reporting — 4.5 Stars

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support@caseware.com, and additional diagnostic reports can help determine setup problems and missing firm information.

Support/Help/Updates — 4.5 Stars

CaseWare has worked diligently to upgrade its product for the 2005 edition. Updates for CaseWare products are posted to the web site, and an extensive knowledgebase complete with movies can be found online, as well. Optional updates published throughout the year are provided for a \$25 shipping and handling fee.

Integration — 3.5 Stars

In order to make use of CaseWare Today, Outlook is required. If you already make use of Outlook contact lists, you might find the synchronization tool between Today and Time quite valuable. CaseWare Time can also make use of local installations of Microsoft Office for creating new Word and Excel files in the Document Manager in CaseWare Time. CaseWare Working Papers is the company's engagement software that provides a complete document management system. Unfortunately, engagement-based activities can only be billed by means of the timer system, as no integrated billing exists for online research, document composition or tax preparation. For those firms converting to a new practice management system, data can be processed from AuditCase, ProSystem fx, and PACS (DOS), as well as most any software that can export lists to ASCII format.

Relative Value

Single timekeepers can purchase this product at a cost of \$499 for CaseWare Time, with an annually renewable \$199 single-user support plan. For our prototype firm of 10 active timekeepers, the cost would be \$999 for the first five timekeepers, and an additional \$175 per timekeeper thereafter — a total of \$1,874 (office licensing includes one year of technical support). Annual renewal pricing is

half of the current license pricing. Firms with fewer than 20 timekeepers will

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