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800-966-1547/www.CPASoftware.com

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From the November 2005 [Review of Time & Billing Software](#)

CPASoftware, which was acquired by Best Software two years ago, who changed its name to Sage Software earlier this year, remains a separate division of the software vendor, and continues to produce applications specifically for accounting firms. Sage CPA Practice Manager: Time & Billing Edition is a streamlined version of the vendor's practice management suite, focusing on time and expense tracking, billing, AR management, client management and due-date tracking, as well as integration capability with Abra and CPA Payroll. The program costs \$399 for a two-user license, \$595 for five users, and \$995 for nine concurrent users.

**Ease of Use/Program Set Up — 4 Stars**

The Time & Billing Edition requires setup of either SQL Lite server or MSDE, which are included on the program installation disk. Setup may require a little more time than some programs because of this separate installation process and subsequent mapping of the database files. The system opens to a well-designed Windows interface and provides an intuitive client center that eases selection of clients for either data entry or review purposes. The client list is sortable and filterable, and displays information such as WIP and AR balances. The system's primary screen utilizes text links to access the main functions of the program, including data entry, billing, AR, contact management, administrative tasks and reporting options.

Time and expense data entry is performed on consistent tabbed screens that simplify looking up previous timesheets and show current daily billable, non-

billable,

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As an alternative method of data entry, Time & Billing allows the use of multiple timers for active tasks, which transfers time, client and code data to a time sheet automatically when the user is ready to record the time slip. The system also includes due date monitoring and an In/Out log.

### **Management Functions — 4 Stars**

Sage CPA Practice Manager: Time & Billing Edition can be used for time-based or fixed rate billing, with the ability to store up to 25 rates per staff member and can support an unlimited number of employees and clients. The system also provides limited HR-focused capabilities, such as tracking vacation, holiday and sick time, as well as CPE coursework. Security features allow management to override rates or perform manual markups/markdowns, and can limit users to specific tasks or features of the program. The security settings can also prevent users from seeing their billable rates, if desired. Authorized users can also use the system's management analysis tools to track projects and keep an eye on productivity ratios.

In addition to housing contact information such as phone, address and e-mail, the product's contact management utility interfaces with the program's AR to enable posting of payments from the client's data screen, as well as management of WIP and the ability to view and drill down to time and expense entries on invoices. This function also integrates with Microsoft Outlook's contact data and allows customization via the addition of user-defined fields. It also integrates with the reporting function for the generation of client correspondence and marketing tasks. The program enables management to track productivity goals with a calendar view to monitor daily hours and budgeted hours, and provides reminders to release time to WIP. The program can support PDA and web-based time and expense data entry.

## Billing & Reporting — 5 Stars

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## Integration — 4.5 Stars

Sage CPA Practice Manager: Time & Billing Edition integrates directly with CPA Client Write-Up, AP, AR and many other Sage products, as well external accounting

and tax programs, including ProSystem fx Tax. Staff timesheet data can be exported to most payroll systems, just as expense data can be paid via the vendor's CPA Accounts Payable module, then automatically charged back to the client in the Time & Billing system. The program also offers contact management integration with Outlook.

## User Support & Help — 4 Stars

Time & Billing contains the usual indexed help function, along with links to additional help resources. The company includes free support for six months, which is about three times as long as most other vendors; a support plan is required thereafter to ensure program updates and continued technical assistance. The company's web site includes a support center with a Knowledgebase, and training is available on-site, online, by phone or at many locations throughout the year.

**2005 Overall Rating: 4.5 Stars**

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