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*From  
the Nov. 2006 Review of Time & Billing Systems*

## The Billing

Matters system provides a comprehensive time and expense management, client billing and accounting program that includes automated invoicing capabilities, recurring payables, check writing and customizable pre-bills, along with the ability to manage vendors, payables and other related issues. The system can support any number of clients, staff and projects, with the ability to utilize multiple billing methods. It also integrates with many accounting packages as well as with its sibling product, Time Matters, which provides a comprehensive practice management application. The Billing Matters system is available in two versions: Professional and Enterprise. A single-user license of the Professional version costs \$350 with the ability to add additional users for \$200 each. The Enterprise version starts at \$700.

## Ease of Use/Navigation Features — 4.5 Stars

After wizard-guided setup of clients, staff, rates, expenses and other items, the system opens to a mostly blank screen that houses only the primary icon menu across the top. While all of the system's features are available from this menu and a pull-down menu, the program also offers a selection of "navigators," which can act as the primary interface for the system.

Navigators are available for Regular Activities, Simple Billing, Advanced Billing, Billing Setup, Management Reports and Schedule Activities. These screens provide workflow diagrams based on that task group, each showing the various components of time, billing and other processes. Icons within these diagrams allow users to jump to various specific tasks including time and expense entry, for which there are three methods to choose: Quick Item, Timesheet or Add Bill Item.

Quick Item entry displays a spreadsheet of all billing records for a specific

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Fast loading, all data entry screens provide intuitive navigation and clean interfaces that require a minimum amount of data-entry fields. Additionally, the system's client and staff lists are well-designed, providing simplified searching and management of data.

### **Management Functions — 5 Stars**

Billing Matters offers several very useful managerial functions, including an easily referenceable master billing list that displays all time and expense records in a spreadsheet view, with associated summaries also available. The program offers multiple billing methods (split, flat and consolidated) and can support any number of staff with an unlimited number of rates per staff member. The built-in calendaring system in Billing Matters allows viewing of individual or multiple calendars side-by-side with day, week and monthly views with the ability to turn calendar activities into timesheets. The system supports trust account billing.

Among other notable features, the system includes analysis reporting for assessing productivity by client, staff and tasks. The system's BillFlow Manager, which provides an automated workflow process that assists in managing the data entry and invoicing process. Management can set this system to notify them or other users when tasks need to be performed. Additionally, several alerts and alarms are available that can notify users of virtually any situation, while Triggers can be set to automatically perform an action if/when a specific event happens. A full-time audit trail maintains a history of all data changes. A wireless device option also allows users to remotely enter time, contact and calendar data.

### **Billing & Reporting — 5 Stars**

The Billing Matters system provides several billing options, from basic summary invoices to more comprehensive detailed invoices, as well as those for split

and consolidated bills. All reports are customizable using the report writer/invoice

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for accounting. The system also imports data from Timeslips, ACT!, GoldMine and Tabs3, and can integrate with Outlook for contact management and e-mail. As noted above, it allows output of all reports and invoices into \*.PDF and can export into Excel format, as well.

### **User Support & Help — 4.5 Stars**

Billing Matters offers a well-built Help system with right-click menus and offers guidance in most setup tasks. The system includes training videos on CD as well as links within the program to the company's support website and training options.

**2006 Overall Rating: 4.5 Stars**

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