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### *& Billing Systems*

TPS Time & Billing offers comprehensive time and expense tracking functions along with invoicing capabilities. The program, designed primarily for accounting professionals in small and midsize offices, also offers contact management, calendaring, AR, due-date management, client correspondence templates, managerial reporting and web-based remote entry capabilities. TPS integrates with QuickBooks, with Outlook for contact management and communication functions, and with Word for invoicing and forms customization. It supports flat and time-based billing with up to 20 rates per staff member, and it supports any number of clients, billable staff and job codes. Likewise, the program can be used to support any number of businesses. Pricing for TPS Time & Billing starts at \$279 for a single-user license; additional users are \$99 each.

### **Ease of Use/Navigation Features — 5 Stars**

TPS opens into a well-designed Windows interface that starts out mostly blank and grey, with an icon toolbar across the top that provides access to the primary features within the system. Selection lists for clients, employees and work codes are easily accessible, opening into a sortable, filterable and searchable spreadsheet list that includes name, phone, e-mail and address information, as well as client ID. Built-in wizards and guides assist in setup tasks, including the creation of new business entities, clients, employees, invoice templates, and setting up work codes and billing rates. Entry of basic client and employee data takes place on tabbed entry screens that include multiple user-definable fields for tracking specific information, as well as the ability to set tax rates, finance charge settings, billing options, assign clients to a specific staff member or partner, and the ability to set client status, group clients

into type or industry, or classify as prospects. The system's Outlook

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format and provides a color-coded display of all entries for the current user, helping to identify start and stop times for each task and client. For redundant or recurring projects, professionals can easily copy timesheets already in the system. While entering time data, the program alerts users to outstanding WIPs.

### **Management Functions — 4.5 Stars**

TPS includes excellent security functions that enable blocking of virtually any aspect of data to unauthorized users, even down to individual staff billing rates. The program also provides due-date monitoring functions, support for virtually any number of billable employees, with up to 20 rates per staff member, support for multiple companies, quick access to client histories with drilldown capabilities, write-up and write-down functions, and the ability to group client businesses. The time and billing system allows setting of budgets per client, with alerts that notify users of nearing thresholds and management approval required for overrides. TPS also provides a strong AR feature that includes the ability to set individual finance rules per client, and WIP + AR analysis tools. Since the program is designed specifically for accounting firms, it uses terminology appropriate to the profession.

The system can also be set to bill at a flat rate for specific tasks, and eases the tracking and addition of expenses (with fees) to client invoices. Various reports and analysis tools enable administrative management of firm, client, staff, and task productivity and profitability. The system also allows tracking of billing targets for individual staff. Employee CPE and other educational items can also be managed through TPS.

Contact management functions sync with Microsoft Outlook, helping to retain a singular repository of client data that includes search and filter options, while TPS' calendaring functions can automatically create events in Outlook

based on entries in the time and billing program. TPS supports remote data entry

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AR and AR aging reports are solid, and TPS offers standard reports with drilldown functionality for WIPs, financials (cash or accrual), productivity analyses (work code, activity, employee, client), and lists. All invoices and reports can be edited and customized in Microsoft Word and other formats for editing or data analysis.

### **Integration — 4.5 Stars**

In addition to the previously mentioned Word editing capabilities for reports and invoices, TPS Time & Billing can export reports to PDF, Crystal Reports or \*.CSV formats. The program's integration with Outlook enhances contact management functions and enables calendar items to be shared between the two systems. TPS also offers import and export of client data with QuickBooks. The system does not offer direct client e-mail options.

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

TPS includes right-click menus and a standard Help utility, while the company's online support center offers program downloads, training videos, client training, FAQs, and a client login for one-on-one online support. Most of these functions require an annual support contract, which costs \$75 for the first user and \$35 for each thereafter. Support contracts include unlimited phone assistance, as well.

**2007 Overall Rating: 4.5 Stars**

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