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TPS Software Inc. — TPS Time & Billing Software

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From the [Nov. 2008 Review of Time & Billing Systems](#)

TPS Time & Billing Software is designed exclusively for tax and accounting practices and more specifically for the small tax and accounting firm (up to 60 employees). If your firm needs a simple Time & Billing program with a clean interface, this package is worth considering. Each year, the vendor's management team surveys its users to gain a better understanding of its user's demographics, to get feedback on the functionality of the program and to ask for suggestions on possible improvements to the program. The suggestions that are received get reviewed by management and are then voted on by the user base for possible inclusion in future versions. A single-user license is \$299; each additional user costs \$129, and there is no difference in pricing if running on a network.

Ease of Use & Navigation Features – 5 Stars

Simple design is the best way I can describe the user interface. The main menu consists of a set of icons across the top of the screen. Each is self-explanatory and makes for easy training. The client screen has several columns of information, and each column can be sorted by clicking the top of the column. This makes finding client information a snap. Clients can be assigned a group, like a family,

and you can see how profitable groups/families of clients are to your firm. You are never more than a click away from changing to a different main menu item and moving from client entry to time entry or anywhere else in the program.

The user permission settings make it easy to set up staff with only the features they will be using. Based on the security settings you give your staff, they will only be able to see the icons of the items you give them permission to see. If you want some of your staff to only track time and set it that way, then they will only see the time entry icon in the main menu. The time entry screen is very clean, and entering time via a time-sheet or a live timer are both available options.

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Practitioner Says:

“We have an eight-person CPA firm located in Clifton, New Jersey. We prepare audited, reviewed and compiled financial statements.

We have about 700 clients and prepare every kind of tax return imaginable.

We have been in business for about 30 years. We chose TPS because it is designed for accountants only. I like the fact that they know and understand my needs, and they are constantly adding new functions and features that will make my practice more profitable. The most beneficial aspect of the program for our practice is the reporting — the analysis I get from all the time entered and billing done. I’m able to easily see which clients are ones we’d like to replicate. And because we know the profile, we can target our business development to locating more of these type of clients. TPS also helps us ensure that we have our staff performing the functions they were hired to do, and we’re able to see

which employees are excelling. Finally, TPS helps us zero in on the type of work that is most profitable. I would recommend that new users utilize the vendor's support group to help guide the set up and to help maximize what will come out in the analysis six months and six years from now. The support staff knows its stuff and is able to help you understand what the "best practice" is in any of the functions."

Management Functions – 4.5 Stars

There are a few management functions I found somewhat unusual but very helpful. A time overlay can be utilized so managers can view how much time a staff person has recorded for different intervals such as a week, month or year compared to the total amount of time a staff person entered for the same intervals the prior year. A manager can see specific time entries for various staff people and make changes if necessary.

While in the client screen, you can right-click a client and quickly see a snapshot of the client's up-to-date WIP, A/R and history. This makes it easy to see details of billed transactions, open items, etc. Filtering capabilities are offered in the client history tab. For those who want due-date monitoring, this program can do it. The due-date monitoring feature makes it easy to track projects so things won't fall through the cracks.

Billing & Reporting – 5 Stars

Standard billing can be set up on the client setup screen. You have the option of billing by time or you can set up a fixed fee that acts like a retainer against the monthly time incurred. You also have the option to relieve WIP whenever you want. If you are accustomed to fixed-fee billing, this is a nice feature that allows you to measure the incurred time over a period against your fixed-fee agreement.

While in the billing screen, you can filter unbilled time by manager or partner. Seeing the WIP on-screen makes it simple to generate a bill on the spot. You can progress bill parts or all of the outstanding time, and there are options to apply a markup or markdown as you are billing. Standard phrases can be set

up to use while billing, which can make the task of getting billing out much quicker and more uniform. You even have the option to pull phrases from prior invoices to use on the current bill. Invoices are exported into Microsoft Word prior to printing. Reports are abundant and can be customized to your needs. All report-ing and customization is done in Crystal Reports.

Integration – 4 Stars

TPS's integration is limited to Microsoft Office products as well as very limited integration with QuickBooks. As previously mentioned, depending on your work environment, this can be a limitation or no limitation at all. Outlook integration, in this case, offers real-time bi-directional synchronization, and I found this feature to be very useful.

User Support & Help – 4.5 Stars

The program has built-in Help screens, and new user training is available when you purchase the software. Sixty days of toll-free technical support is also included with the purchase. Annual renewal fees are \$75 for the first user plus \$45 for each additional user per year.

2008 Overall Rating:

Intuit, Inc. • Article

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