

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

& Billing Programs

TPS is a time and billing product that is specifically designed for accountants in public practice. The product is built on Microsoft technologies; therefore the product has nice integration with other Microsoft applications.

EASE OF USE –

Since TPS was build specifically for accountants, it has a straight forward and intuitive time and expense entry workflow. The user interface and navigation has a distinct Microsoft look and feel. This client server installed application is fairly easy to install and set up. Once the firm has loaded all of its client, staff and billing information, the assignment of time and expense entries is easily done with intuitive drop down menus.

When the user sets up a client engagement, managers can assign staff to each engagement as well as enter the client referral source. I was surprised to see this option in the product, but keeping track of your client referral sources is a good business practice. Users can either directly enter their time or use the stopwatch type timer in the product. The stopwatch will automatically transfer the time to the time entry.

A unique feature in TPS is its ability to create confirmation letters for cash, accounts receivable, notes payable, etc. There are many template communication letters preinstalled in the product. Since TPS utilizes Microsoft technologies, these letters are easily customized to your specific scenario or situation. TPS also has a remote access feature that allows staff to enter time and expense items while away from the office.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

get busy around the office and you need to make sure all tasks get taken care of in a timely manner. The Due Date Tracker is very easy to set up and use in this product. Additional filters available are listings of engagements by staff, status, extension filed, etc.

BILLING PROCESS –

The billing process in TPS is quick and simple. There are two primary billing options in the product; Quick Bill and Detail Bill. Quick Bill allows the user to select unbilled WIP and the selected WIP and related information is automatically populated on the final bill. Detail Bill allows the user to select the WIP to be billed and then edit/customize the invoice before it is presented to the client.

The Detail Bill process also allows users to integrate client notes from the time & expense entries with the final bill. TPS also allow firms to create libraries of billing paragraphs that can be used over and over. This is a great time saver when preparing bills. This is a simple point and click process.

Once the bill is prepared, there is an onscreen preview feature that allows users to review the bill before it is printed. Bills are produced as Word documents and spell check is available to ensure no spelling or grammar mistakes are made. TPS makes it easy to create final bills, interim bills and partial bills. Mark up/downs of WIP are also easily managed during this process.

INTEGRATION –

As mentioned above, TPS is built using Microsoft technologies, therefore integration with MS Office products works very well. At the present time, TPS does not integrate with any other applications or products.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved