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800-267-1317

[www.caseware.com](http://www.caseware.com)

From the **July 2012 review of Practice Management** systems.

**Best Fit:** Firms currently using CaseWare products

**Strengths:**

- Tight integration with CaseWare products
- Multiple preformatted reports along with strong customization options
- Built-in sync capability between Outlook/Exchange and client information

**Potential Limitations:**

- No current cloud based solution
- Integration generally limited to CaseWare products

CaseWare Time is the time, expense and practice management offering within the CaseWare product lineup. Built on the Microsoft SQL platform, the solution is fully scalable to meet the needs of sole practitioners as well as multi-location firms.

CaseWare Time also includes a variety of tools to help ensure accounting professionals are running their firm as efficiently as possible.

**BASIC SYSTEM FUNCTIONS**

CaseWare Time has a generally intuitive navigation. Upon opening the software, users are taken to The Time Workflow page. This page serves as the starting point for all areas within the solution and provides direct links to a variety of tasks. The direct links provided are solely based on user rights of the current user to prevent

unauthorized or unintended access to client-sensitive information, such as billing.

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software and to aid in setting up their respective companies.

## **TIME MANAGEMENT CAPABILITIES**

CaseWare Time allows users multiple ways to enter time and expense items. Time and expenses may be entered directly into the time sheet module by day or by client summary. Time may also be entered via WebSheet, the included Internet interface. WebSheet was designed for quick data entry and the options are less detailed than within CaseWare Time. WebSheet also allows time to be entered from any device with access to an Internet browser, including smartphones and tablets. CaseWare is currently developing specific user interfaces for smartphone and tablet devices and is set to release these interfaces over the next 12-18 months.

CaseWare Time includes a number of project templates and users may also design their own custom templates for use. Projects may be assigned to clients at any time. Once assigned, the project templates may be further edited as necessary for specific due dates, budget issues and staff assignments. Projects may also be set to generate upon rolling periods forward.

## **INVOICING FUNCTIONS**

CaseWare Time keeps all posted time and expense items in real time to allow a streamlined billing process. All billing may be done from one screen by simply selecting the client and filtering time and expense by project as desired. Invoices may be set to automatically gross up based on predetermined rates or may be entered automatically. All time and expense items associated with the invoice are automatically adjusted as appropriate. Once the invoice is final, it is posted to the general ledger where payments may be subsequently applied. CaseWare also includes functions to perform recurring invoices based on time frame that are automatically

generated upon rolling the period forward. Miscellaneous invoices, interest charges

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## **MANAGEMENT FEATURES**

CaseWare Time features a dashboard view allowing users to see summaries of various areas within the system. The dashboard screen is fully customizable and may show various time, project and billing information. The dashboard may also be set to automatically refresh based on predetermined time intervals. Each of the summaries may be drilled down through double clicking to obtain the underlying details. This feature was intended for use primarily by partners and managers, but is accessible by all users. Information available for display, however, is solely based on user rights. CaseWare Time allows for multiple users and user groups based on firm needs. Rights may be assigned on a staff level or group level and staff may also be a member of multiple groups.

CaseWare Time has over 200 reports that can be edited and filtered based on need. Each report is stored within the document management system which organizes reports into hierarchical folders, and allows specific reports to be easily accessible depending on the staff function. Client management is equally as organized and allows categories to be assigned to each client. These categories may then be used to focus on clients meeting specific filter criteria.

## **INTEGRATION & DATA MANAGEMENT**

CaseWare Time includes two directly built-in integration tools; Today and WebSheet. Today is a software solution built on the Outlook/Exchange interface and directly links the contact information between Outlook/Exchange and CaseWare Time. The advantage offered by Today is that no records are duplicated and each contact record is unified throughout the system. WebSheet is an Internet based interface system that provides direct links to CaseWare Time.

This interface allows staff to input and edit time and expense entries while outside

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which includes a document management solution, is present and allows for direct import and export of a variety of document types. Data may also be imported through Excel or ASCII formats.

## **HELP/SUPPORT**

CaseWare Time has traditional help options built into the system. Help may also be obtained through phone and email during normal support hours. Additionally, CaseWare provides a wide range of support tools through its website. A fully searchable online knowledgebase is available and is continually updated based on user feedback and questions. CaseWare also provides assistance through its QuickVids, which are brief tutorials on common tasks used throughout the system. CaseWare also relies on numerous social media outlets to gain feedback and offer support to its customers.

Updates to the system are typically done on an annual basis. However, update patches are made available if necessary. Any changes or enhancements made are fully detailed on the CaseWare website. Several tools are built into the system to aid smaller organizations that may not have dedicated IT professionals. Many of these tools are specifically related to the backup and maintenance of the SQL backend. These tools offer simple to use instructions to ensure the integrity of CaseWare Time is maintained properly.

## **SUMMARY & PRICING**

CaseWare Time contains everything needed to efficiently track time and manage projects. Built with a Microsoft SQL backbone, CaseWare Time is fully scalable to meet the needs of sole practitioners as well as multi-location accounting firms. CaseWare Time is currently undergoing a product evolution process. Over the next

12-24 months, several additional modules and enhancements will be introduced,

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