http://na.sage.com/Sage-Timeslips/
www.sagetimeslips.com

Best Fit: Small and mid-sized professional services firms (accountants and other professions) seeking a time management and invoicing solution that integrates with accounting, practice management solutions and Microsoft Office products.

Strengths

- Integration with several professional programs
- Easy to use Sage Timeslips eCenter for remote entry of time and expense data
- Customizable dashboard views of key firm information

Potential Limitations

- Limited built-in tracking of accruals and other HR matters
- Project management tools may require training

Sage Timeslips continues to be one of the most popular time and billing systems for professional accountants, lawyers and consultants, providing simplified time and expense entry, invoicing, accounts receivable management and reporting. The system now also offers a remote access Sage Timeslips eCenter for web-based or mobile entry of time and expenses. Other recent enhancements to the program include expanded billing functions and an optimized workflow structure that streamlines entry, invoicing and reporting processes.

Basic System Functions: 4.75 Stars

The Sage Timeslips brand has been around for more than 25 years, with my first experience using it in about 1998. The system opens into an intuitive interface that offers a left side icon menu for moving into the key program centers, including the

The system is not specifically designed for accounting professionals, but it offers considerable customization options, from terminology to workflow processes, and users can also customize most areas of the interface, often by simply dragging toolbars to desired locations or by adding elements or renaming items. The program is designed primarily for 1-10 users, but can scale larger as necessary.

Time Management Capabilities: 4.75 Stars

The Time and Expense console simplifies data entry, providing intuitive links to functions such as entering time or expenses, managing and submitting multiple slips, viewing expenses by client or activity, as well as summaries of weekly and monthly totals. There are multiple methods of entering time and expenses, with the most detailed option being on popup work screens that include selection lists for the entering the employee, task, client, reference information, billable status and other details, including adding notes and accessing a task timer.

Client management screens enable setting of rates, credits, discounts, aging balance actions and account and payment information. Tasks can be assigned to clients, but my experience with project management setup was a bit challenging, with formatting of projects requiring a specific naming system. Client management screens are easily accessible, with the ability to quickly create client templates or to manage rules and settings.

Sage Timeslips includes the ability to set up a multi-level approval process for supervisor or partner sign-off on expenses and time, with the Bill Stages dialog box providing a quick view of where the process stands. The program does not offer human resources functions, but PTO can be tracked for non-billable reporting purposes, with no accruals management functions.

Invoicing Functions: 4.5 Stars

Users can quickly see the status of a bill by viewing the Bill Stage indicator, showing whether it is ready, in proof format, a revision or approved. Buttons offer quick access to a pre-bill worksheet, budget analysis, aged WIP analysis and histories. Approved invoices can be displayed on screen, printed, saved to text or PDF formats, or emailed from within the program.

Sage Timeslips' accounts receivable module opens to a dashboard that shows all clients with overdue balances, recent payments and other recent AR activity. It includes tools for performing write-offs, markups, markdowns, reverse payments and entering refunds. Additional functions are in the collections feature, which provides AR aging, an aged invoice list and the ability to track client communications. With the optional Sage Payment Solutions offering, firms can accept credit card payments for receivables.

Management Features: 5 Stars

Sage Timeslips offers dashboard views of key data in each of the main function areas, including AR, billing, time and expense entry, account management and AR. The primary dashboard is found in the Sage Timeslips Today screen, which can be customized to show overdue clients, account balances, messages and alerts, and graphical elements.

For managerial reporting, the program provides more than 100 standard report options, which can be customized in terms of data displayed, formats and text layout. When viewed on-screen, reports offer drilldown functionality. User-level access rights and user roles allow firm administrators to assign staff into user groups or to grant or block access to specific areas of the program. An audit trail maintains a log of all user activity.

Integration & Data Management: 4.75 Stars

of time and expense data, client information and tasks, which is then linked back into the desktop or networked master version of Sage Timeslips being used by the firm. The Sage Timeslips eCenter can be used with all major browsers for Mac and PC, and provides an optimized interface for users on mobile phones and other devices.

As noted previously, firms also using Sage Payment Solutions can integrate credit card payment acceptance into the AR module in Sage Timeslips.

Help/Support: 4.75 Stars

The built-in assistance functions in Sage Timeslips are abundant, with right click menus, task-specific help, and a traditional index utility. Live technical assistance is available via support plans or on a pay-per-use basis. Program downloads can be set to automatically install or can be accessed from the company's online support center, which also offers user and implementation guides, a knowledgebase, videos, a blog and a user community. Advanced training options are also available, such as Sage University, which provides live and recorded webinar sessions.

Summary & Pricing

Sage Timeslips provides comprehensive time management and invoicing functions for firms billing by the hour or on a flat fee basis, giving them in depth reporting and analysis that helps manage productivity. The system's AR and collections utilities, along with the optional remote access Sage Timeslips eCenter, provide excellent functionality for firms with demanding time management needs. The single-user version is $499, with upgrades costing $399. Additional users can be added for about $250 each. The eCenter costs $19.95 per user per month.

2012 Overall Rating: 4.75 Stars

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