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excellent time and billing functionality. Completely browser-based, Practice Engine also includes complete practice management capability, including a Scheduler, Workflows/Job

Mary Girsch-Bock • Mar. 15, 2019



Practice Engine

www.PracticeEngine.com

From the 2019 review of **time & billing management** systems.

Practice Engine is a full-featured practice management application that offers excellent time and billing functionality. Completely browser-based, Practice Engine also includes complete practice management capability, including a Scheduler, Workflows/Job Tracking, CRM (Contact Management), Budgeting and Expense

Management capability. Practice Engine is best suited for very large professional

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entering time. The system also automatically generates an email to any staff member that has not entered time. The system also assigns an index number to every time entry made for easier time tracking history.

Practice Engine offers a variety of flexible billing options, including the ability to bill fixed pricing, variable pricing, progress bills, and combination bills. Installment bills can be created automatically in Practice Engine, and users have the ability to add administration fees to any bill. Standard formats are available for all invoices, and users have the ability to bill the parent client if dealing with subsidiary clients. There is also an option to reverse invoices that have been entered into Practice Engine, with the ability to re-issue invoices as well. Progress bills can also be issued from the application, and users can email bills to clients directly from the billing screen. There is also a client portal included in Practice Engine, so users can simply upload bills to the portal for clients to access at their convenience. Statements can also be created in Practice Engine, with users able to create a single statement to the parent client if desired. Practice Engine also offers a paperless billing option, emailing the bill to a client, while providing a link for clients to pay online through the client portal.

Practice Engine offers excellent reporting options for time and billing as well as practice management. Reporting options include a Gross Profit by Industry report, a Charge Hour Report, that looks at specific target amounts, actual totals, total hours billed, and utilization percentage. There are also realization reports for both client partner and engagement partner, as well as a staff client listing that includes project dates for better planning. Other reports available include a non-chargeable time report, as well as various WIP reports including a WIP staff summary report as well as YTD WIP fees billed.

All Practice Engine reports offer drill-down capability, allowing users to view originating documents for any report processed. The product also offers integration

with Power BI from Microsoft, which produces interactive visualizations and

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Training is recommended for anyone who will be using the application, with refresher training recommended as well. Practice Engine also will handle the data conversion process from any major practice management application, doing a test conversion to ensure that the process go smoothly prior to any purchase of the application being finalized.

Product support is provided to all firms that maintain a standard Annual License contract. Support is the place you call when you need help, either because something has not worked as it should, or assistance is required with a specific topic. All support calls are logged, with Practice Engine typically resolving any support issues during the initial call.

Practice Engine is a complex, highly customized application that is best suited for larger professional services firms including accounting and CPA firms. The product offers a high level of custom product setup and implementation from the beginning, including data conversion, system implementation, and pre and post implementation staff training. Those interested in Practice Engine should contact the vendor directly to view a demo or to obtain an initial price quote.

2019 Rating – 5 Stars

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