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**FIRM MANAGEMENT**

# 2020 Review of TPS Software Time & Billing

Mary Girsch-Bock • Mar. 16, 2020



**TPS Time & Billing Software**

**888-877-2231**

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

**From the 2020 reviews of Time & Billing systems.**

TPS combines practice management and time and billing capability in an easy-to-use application that is designed for accounting professionals. TPS is best suited for small to mid-sized firms that are currently in the market for an all-in-one application that also includes excellent project management capability. The

company has products designed for both the U.S. and Canadian markets this review focuses on the U.S. product.

TPS offers excellent flexibility, with both on-premise and cloud deployment options available. Currently, Cloud Axis offers four plans, including a free plan that's ideal for a one-person office. A mobile app is also available that easily supports remote time entry.

TPS Cloud Axis includes WIP, A/R, Invoicing, and A/R Statements, including built-in invoice templates and email functionality, allowing users to easily create and email invoicing directly from the application. The application offers an intuitive user interface, with a toolbar to the left of the screen offering quick access to system features. One of the best features for new users is the ability to access short instructional videos throughout the entire setup process.

All clients in TPS can be assigned multiple categories, making it easy to filter reports and customize any client mailings. Users can track up to 20 different rate levels for each employee, with the ability to assign special rates for each client.

Downtown Lock'n Key Ltd

Categories	Engagements	Due Dates	Banks
General	Admin	Billing	Notes
			Contacts

Partner: KHM - Ken Morton

Manager:

Accountant:

Other:

Flags

Inactive

Prospect

Non-Chargeable

On Hold

Client Folder

C:\Users\Mark\Documents\TPS Software\Invoices

Other

Referral:

Acquired:  15

Dropped:  15

Exposure

WIP + AR:

Cancel Apply Help

The time entry screen offers a variety of ways to enter time. Users can enter time manually by clicking on the New Time Entry tab, or start the timer for automatic time tracking. TPS also includes a time entry grid, making it easy to enter time for multiple employees. A time entry calendar is also available for those who wish to track and manage time using a calendar, with daily, weekly, or monthly views available.

The billing screen in TPS displays WIP totals, along with a client ID and client name. Users have the option to display all clients, or just unbilled clients. Clicking on a client ID will display a drop-down menu, where users can choose the type of billing they wish to process, with Quick Bill, Detail Bill, and Progress Bill options available.

An automatic billing option is available, as is the option to set up recurring invoicing for clients who are billed a flat rate at regular intervals. Users can bill all items in a single bill, or pick and choose which items they wish to bill. Markups are easily added to any bill, and there is also an option to bill all clients, or choose select clients from the list. Completed invoices are easily viewed on screen, with the ability to edit them if necessary, and invoices can be emailed to clients directly from the invoice screen or printed and mailed if desired.

TPS offers excellent reporting options, with all reports offering drill-down capability. A variety of standard time and billing reports such as Employee Productivity, Firm Billing Realization, and Top-Ten Billing by Client are available in TPS Cloud Axis, with users able to export data to Crystal Reports for more report customization. In addition, all reports can be exported to Microsoft Word and Excel, CSV, XML, RTF, and RPT formats, with users also able to save any report as a PDF.

TPS does offer integration with Microsoft Office applications, as well as with online payment solution Payclix, enabling firm clients to pay invoices online. Additional integration options are limited to QuickBooks and Canadian tax software TaxCycle, which is only found in the Ultimate plan.

TPS offers a variety of help and support options including FAQs, various videos, and access to TPS downloads. TPS offers 60 days of free support and updates to all new users, with an option to continue support coverage at a cost of \$115 per year for a single user, or a five-user system costing \$435 annually. Support options offered in TPS include telephone, email, and a user forum, with the free version only offering support through the forum. The TPS website also includes a number of training and informational videos for users to access at any time, with client training options available to anyone that has a current TPS support agreement.

The on-premise edition of TPS is currently available for a one-time fee of \$460 for the first person time is being tracked for, with subsequent licenses costing \$210. The one-time fee is not annual, and includes support and updates for 60 days, plus online new user training. Continuing support costs \$120 per year for the first person, and \$85 per year for subsequent users. Continuing to use the system only requires annual payment of the updates and support. For those who prefer online access, TPS Cloud Axis offers four plans: Startup, which is free; Entrepreneur, which is \$10 per month per user; Pro, which is \$15 per month; and the comprehensive Ultimate, which is \$20 per month.

## 2020 Overall Rating 4.75 Stars

### Strengths:

- All plans are affordably priced
- Offers numerous instructional videos throughout the application
- Offers both on-premise and cloud access versions

### Potential Limitations

- Integration is limited to QuickBooks and TaxCycle
- No searchable knowledgebase
- Support must be purchased separately

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