

# Includes Interfaces for Use with Palm and Pocket PC Portable Devices

*Tables for completed work, work in progress and scheduled work open from the time icon, allowing managers to review clients assigned to various staff.*

By Richard Buse

The initial impression gained from trying TPS Time and Billing is that it's very easy to use. With icons, familiar pull-down menus, and other visual and navigation characteristics associated with Microsoft (MS) Windows-based software, new users to this product won't face stiff learning curves.

Continued use, however, also reveals that this application incorporates very robust capabilities, including the ability to drill deeply into time and billing records, and generate 200+ types of reports based on Crystal Reports' design templates.

TPS Time and Billing is provided by TPS Software of North Vancouver, B.C. The company specializes in developing software for small- to mid-size accounting firms.

## Features

TPS Time and Billing installs on servers and workstations using MS Windows 98 or newer versions of the Windows OS. Client contact information transfers seamlessly with MS Outlook. Time and Billing also includes interfaces for use with Palm and Pocket PC portable devices.

Clicking on the Employee tool bar icon opens a list of all employees. A second click on an employee name produces a popup window with tabs for rates, rights, courses and targets, as well as general employment information. With additional clicks, managers view what rights an individual has for entering or reading crucial data, what CPE coursework was completed, the assigned rates for that individual's work, and how that person's output compares to billing and productivity targets.

The easy navigation and drill-down capabilities continue with other Time and Billing functions. For example, the handshake icon opens a table of all clients, displaying full names, ID numbers, phone numbers, email addresses and mailing addresses. Clicking on a client listing opens a popup window, enabling users to access detailed information regarding engagements needed by that client, staff assigned to that client, tax forms or returns required, billing rates, schedules, and any applicable notes.

Through Time and Billing's work code icon, administrators enter codes and rates for various assignments, including audits, write-up, individual and estate returns.



Tables for completed work, work in progress and scheduled work open from the time icon, allowing managers to review clients assigned to various staff, particular tasks performed by individuals and expenses incurred. Calendars for individual employees display total billable hours worked each day, with breakdowns available based on task and client.

The Bill icon produces tables showing work billed for YTD and previous year, as well as current and past markups. Records sort according to partner, group, accountant, client or dollar amount.

A library of paragraphs eliminates typing standard (but necessary) verbiage for bills or invoices, while templates provide a basis for developing billing documents. Data merges from billing tables with bills or invoices printing in MS Word.

Tools for reviewing outstanding balances, calculating finance charges, posting due dates on calendars, establishing automatic billing dates and other tasks enable firms to further monitor accounts receivable processes and manage cash flow.

Report categories include work code, client, work in progress, billing realization, employee, time, activity and due dates. Time and billing uses Crystal Reports' templates, and a report wizard tool generates customized reports based on user-defined data.

Time and billing offers a detailed list of topics in its Help menu. An annual support plan based on number of users includes free upgrades available from its website, and up to 100 technical support calls per year.

## Summary

Time and Billing's familiar operating characteristics make it an easy application to learn. Its compatibility with older versions of MS Windows OS alleviates IT cost concerns some firms face when considering new software purchases. While making Time and Billing easy to implement, TPS also incorporates a range of robust capabilities for more effective practice management.

TPS Software focuses on serving small- to mid-size accounting firms. With Time and Billing, it does a great job of meeting that market's needs. ☺

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