

TPS Time & Billing Interfaces With Outlook

By Isaac M. O'Bannon

TPS Time & Billing for Accountants from TPS Software (888-877-2231; www.tpssoftware.com) is a stand-alone time and billing program that provides a comprehensive set of functions and tools to assist



professional services firms with allocating client expenses and tracking and billing time spent on client or administrative activities. The program provides an extensive selection of firm management and reporting options, including customizable reports for billing, AR, work-in-progress, cash-basis and accrual-basis financials, client reports, tasking and activities, cash flow, and trial balance.

Time & Billing is a fully developed 32-bit Windows program built around a Microsoft Access database. Installation recommendations suggest around 100MB of free disk space, a Pentium-class processor and at least 32MB of RAM; and the program will run in any Windows environment. The software can be installed on network servers when a multiple user license is purchased. Although not required, users will benefit if they use Outlook as their e-mail program, since the program interfaces with Outlook for client information sharing purposes.

The program opens to a mostly gray screen with navigator icons and typical pull-down menus across the top of the screen. Most of the program's features and commands can be accessed in multiple ways, such as through the icon menus, using "hot keys," selecting the appropriate Windows menu item or by clicking the right mouse button, which provides a shortcut menu that presents you with functions relevant to your current task. The menu and icon toolbars remain at the top of the screen throughout the program's various application windows, providing a clickable list of the major functions available in each application.

Time entry is obviously the key mission of any time and billing system, with most other features flowing from time and expense data that is entered either directly by employees or by administrative staff. The primary function of TPS is to account for the time of each individual in a firm, whether or not it is spent on client billables, and whether or not the time will actually be billed. The program also provides expense tracking features that aid in transferring these expenses to clients. Time and expenses are entered in the Time entry screen, which can be accessed from the main screen by clicking the red clock icon. Time can be manually entered or the user can start a computer clock to record the time for each task.

Throughout the program, all manual data entry is performed through dialog boxes, which resembles the contact management function in

Outlook, with toolbars that offer the most common data-entry commands. Fields can be selected for entry by using the mouse or by using the keyboard. Most data presentation screens and many of the entry forms use intuitively designed spreadsheet windows to display information, although

ments as small as six minutes (0.1 hour).

For each employee, as many as 20 billing rates can be set up, including a personnel overhead rate for that employee (salary, benefits, other costs). Access rights can be set to various levels of employee responsibility, thereby

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actual data entry is performed in a window outside of the spreadsheet that appears when a desired field is selected. The program also provides support for remote data entry using a PDA or a notebook computer and synchronizing it with the workstation.

Time entered for the day appears as a graphically appealing timeline, with colored lines indicating the amount of time spent on specific clients. Totals of the employee's chargeable hours, non-chargeable hours, total hours and total billable amount are visible on the bottom of this screen, helping to prevent billing overruns. Since many tasks and time entries are repetitive or close to identical, TPS has included the ability to duplicate time entry lines and then edit them as needed. The application bills in time incre-

determining how much or how little an employee can access in the program. Special rates can also be entered for particular clients.

No pause function is available on the automatic clock feature, so if the clock is stopped due to an interruption, a new clock has to be started, which results in a new time entry line. The data can, of course, be edited later, but I think the time should be pauseable. (The company noted that it does provide a simple function to "merge" all identical entries as in the case of multiple interruptions. The final transaction shows one entry with a total "elapsed" time.)

What good is accurate time keeping without effective billing? The TPS program also provides a respectable AR function, including the generation of invoices and state-

ments, payments and credits to bills, calculation of taxes, and interest and finance charges. Bills can be customized to include time and expense charges whether based on an hourly rate or flat fee and can also include sales tax and add interest on overdue balances. The program includes an ample practice management function, which includes analysis of various components of a firm, including clients, employees and fees, and it provides a comprehensive selection of reports that assist in evaluating the performance of employees and the productivity and profitability of a firm. An AP and Payroll function should be integrated to round out the program's role as firm management software.

Sometimes there are little things that confirm a program's strength. TPS provides good mouse-overs for its icons (when your cursor goes over it, it tells you the function of the icon) and a good Help function, with assistance available through the program and online. Unfortunately, purchasers of the software receive only 60 days of free technical support, but an optional assistance package to extend that time can be purchased.

The program is a snap to learn and remarkably easy to navigate, and it performs smoothly while offering a generous number of reports. It has the flexibility to manage any size firm, but would really complement a mid-sized office that is looking to tweak its productivity. A single-user package costs \$279, and a five-user license costs \$675. ■★★★★