



TPS Time & Billing Offers Outlook Integration

By Isaac M. O'Bannon

TPS Software (888-877-2231; www.tpssoftware.com) produces TPS Time & Billing for Accountants, a stand-alone time and billing program geared toward mid-sized and



smaller professional services firms, with features and applications to help accountants track, plan and allocate billing time and client expenses. The program includes management analysis functions and customizable reporting options and integrates with other accounting and office productivity software.

The software was developed "from the ground up" to be a Windows program and is fully 32-bit, which means it takes advantage of many of the more recent advancements in the Windows operating system. The program supports Windows 98 and newer

systems and requires a 300MHz or faster processor, 100MB of free disk space and at least 64MB of RAM, depending on operating system. It can be used on single workstations or in networked settings. To take advantage of Time & Billing's scheduling and synchronization functions, MS Outlook or Exchange is required, depending on network configuration. The program uses a Microsoft Access database included with the software.

The primary screen for Time & Billing is simple, providing a few pull-down menus and icons for key functions across the top with an otherwise empty interface. The main areas of the program are accessed through the icons or pull-down menus: Clients, Timing, Workcodes, Employees, Billing, Firms, Library of Paragraphs, Incompleted Invoices, Invoice Templates and Due Dates. Time entry can be performed either by opening a client from the Client List or through the Timing function. The program tracks time in user-defined increments down to 1/100 hour, although the default is set at 1/10. During time entry, the program presents the data in a timeline format that shows time allocated to each client, billing rate

and other information, and allows clickable access to more detailed billing information.

The time entry screen also keeps an aggregate of the staff member's billable and non-billable hours in view so adjustments can be made in real-time, making it easier to keep within proscribed budgets. The program can pull some client data from Outlook and other programs through an import feature, but firm, staff and other data is entered via screens similar to Outlook that are intuitively designed and are easy to grow familiar with. Time & Billing keeps basic client information such as Company, Contact Information, Year End, Industry, Client Group, web site, e-mail addresses and SIC code. Up to four staff members can be assigned per client: a partner, manager, accountant and other staff member. The Client Information screen also shows the WIP plus their AR limit, client acquisition date and who referred the client. Up to 20 rates can be assigned to each staff member, and an unlimited number of special rates can be directly assigned to clients. The program also supports flat rate and fee-based

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TPS Supports Remote Data Entry Using Laptops & PDAs

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 billing scenarios. Time & Billing's AR function includes user-defined finance charges, statements and aging reports, and allows reprinting of invoices.

Within the billing screen, users have several options for invoicing: Quick Bill, Detail Bill, Interim Bill, Provisional Mark (to create an unassigned mark down in the WIP), or Inquiry (to review past and present detail information). TPS provides dozens of predefined and customizable reports including Client, Work Code, Employee, WIP & AR, Time Sheet, client reports, Billing Realization, cash-basis and accrual-basis financials, employee schedules, trial balance, and

cash flow. The program maintains an audit trail and comprehensive invoice histories that offer drill-down access. TPS also makes use of Word for invoice customization and templates, which allows users to add firm logos or watermarks, use Word macros, insert standard messages and utilize spell checking.

One of the most beneficial features of Time & Billing is its integration with Outlook. For firms using the e-mail and contact management application, Time & Billing doesn't require re-entering the data and helps prevent the duplication of efforts maintaining AR, contact, e-mail and time billing databases.

Appointments scheduled in Time & Billing are automatically transferred to the Outlook calendar. The program also supports remote data entry using laptops, PDAs or Windows CE-based computers that are then synched back into the main system when the user returns to the office.

Time & Billing from TPS Software is strong enough for mid-sized and smaller offices. While its analytical tools are not the most comprehensive, it provides excellent time and expense tracking, customizable billing and contact management tools, and is very simple to use. And it's inexpensive: A one-user license is \$279; five-users is \$675. ■ ★★★★★

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