

TPS Has Both Chargeable and Non-Chargeable Totals on One Screen



By Lori D. Widmer

TPS Software now offers small to mid-sized firms a practice management tool that is truly easy to use. The design of TPS Time & Billing software provides smaller accounting firms with a comprehensive time and billing system and the added bonus of practice management capabilities.

Features

At \$279 for a one-user license, plus an extra \$99 per employee, TPS Time & Billing is a relatively inexpensive software solution that can support an unlimited number of users. Installation takes only minutes to complete.



The company also offers data conversion; fees for the service depend on the source and amount of data.

With just 10 simple icons, TPS has made input a rudimentary task. Access functions like client lists by clicking on an icon. Access the time and entry area and find both chargeable and non-chargeable totals on one screen.

Set up the work code area to match each firm's unique work coding systems. Clicking on the icon opens a window showing various projects and client files under specific headers, such as Special Reports/Bankruptcy. These are fully customizable categories. Opening a link under these categories allows you to input a work code, name, and description of the project, along with clickable fields for chargeable, non-chargeable and expense codes.

Employee information is stored behind one icon, as is TPS contact information. Another useful icon stores the library of paragraphs—standard verbiage that can be inserted easily into invoice letters.

Billing information, the meat of the system's functionality, shows work in progress, as well as final bill amounts for multiple projects for the same client. Another handy feature is a timeline allowing users to see the progression on a client file.



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Double click on a template to open it into a Word document to customize information.

Access client forms through the Client screen by clicking on the client's file, and then choosing the Categories tab. You can input new forms or review the forms already required.

TPS offers both e-mail and phone help. Online technical support is available, but requires a username and password. Also available—online training videos and downloads, FAQs and a Crystal Runtime fix for any upgrade incompatibility.

Case Study

Client information is perhaps the most comprehensive available, thanks to well-planned fields within the Clients screen. Users can tab through a client's file and see all client data on a small window that makes information easy to find and easier to read. Handy functions include a field for a complete list of contacts for that client, along with billing information, forms information and a field to store banking information.

One of the system's unsung features is synchronizing with Microsoft Outlook. From the Client List screen, click on existing client information and the system prompts users to create a client file in Outlook. This allows for seamless communication with clients.

Billing inquiries also is a powerful system feature. Right clicking on any client file within the Billing screen accesses detailed accounts of client bills and provides the ability to "unbill" and re-bill. Quick Billing is another neat feature allowing users to bill with one click.

Summary

TPS Time & Billing is a keen little program that gets users up and running within minutes of installation. Easy to use and understand, the program takes the guesswork out of practice management and makes it simple for employees to manage even the largest client base. Each screen reveals deeper functionality, making this product quite the flexible solution for both small and mid-sized companies looking to streamline workflow and simplify billing.

TPS Software

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