

TIME, BILLING, & ACCOUNTING SOFTWARE FEATURE CONSIDERATIONS – CHECKLIST

❖ IS THE FEATURE LISTED A “MUST HAVE” FOR YOUR FIRM?

- CLOUD OR TRADITIONAL
- PRICING
- ANNUAL MAINTENANCE
- LINKS WITH QUICKBOOKS OR XERO FOR ACCOUNTING
- MOBILE ACCESS / APP
- SUPPORTS TASK-BASED BILLING
- TIMERS
- TRUST ACCOUNTING
- GENERAL LEDGER
- CHECK WRITING
- PAYROLL
- INTEGRATED CREDIT CARD PROCESSING
- E-BILLING
- EMAIL BILLS
- EXPENSE TRACKING
- ONLINE PAYMENT
- RETAINER BILLING
- REPORTING
- BATCH BILLING
- TRUST TO GENERAL TRANSFER
- DOWNLOAD BANKING TRANSACTIONS
- CUSTOMIZABLE BILL TEMPLATES
- REMOTE TIME ENTRY