

The Case Computing Accounting TM Feature Package

Case Computing has developed a Time Matters Feature Package for the special needs of the Canadian Accountant. (It can also be modified for the United States as well)

Based upon the powerful information management program, Time Matters, the Case Computing Accounting feature package provides a comprehensive list of functions designed specifically for your accounting firm needs.

Comprehensive Client Management

We start with specialized Contact forms, where we enter information about a new client your organization wishes to serve. All important client information can be entered here, and because the forms are customizable, you can add any type of additional information that you require to the form as well.

An additional tab, stores other info about your contacts, if necessary

There are specialized contact forms for Clients, Companies, vendors, etc..

The Services area lists all services required by this client

Comprehensive Information Management

Each client record has specific tabs for different types of information. Items such as emails, notes, documents, internet research, even mail packages; can all be tracked under a client record, stored there for easy access. Email from Outlook, or the Time Matters email client can be processed and stored under the client it pertains to. Documents created for a client, are stored under that client's document tab.

Powerful, Effective Task Management

After you have entered your important contact information, it is time to do the work. Special todos are assigned to clients as tasks to be completed. Each task can be delegated to other members of the firm, and then tracked by those doing the delegating. Tasks such as T1s, T2s, T3s, T4s, T5s, Audits, and Financial statements can all be tracked and assigned for each client. Each specific task has it's own Todo record designed specifically for that task:

This T1 task has a delegation area for status tracking by a partner or senior accountant, and an area to track tasks that need to be completed for this task.

Each client's task status can be tracked individually to ensure the highest quality of service is provided.

Customized Powerviews Provide an Amazing View

Powerviews are special viewers that allow you to see what is inside of a contact from a list of available contacts.

Customized display tabs allow you to quickly see just the info you are looking for.

Customized Powerviews give a quick view of all important info about a client

Effective Calendaring and ToDo Lists

Time Matters also has a powerful calendaring system. This calendar system will allow you to track staff schedules, as well as resources such as conference rooms and equipment. A powerful todo system will allow you to assign work to others and track their progress.

The screenshot shows the Time Matters software interface. At the top, there's a navigation bar with options like 'Daily', '3 Days', '7 Days', '14 Days', 'Weekly', 'Monthly', and 'Scheduler'. The main area displays a calendar for August 11, 2009, with a time slot from 8:00 to 6:00. An event titled 'Interview with Bob Jones' is scheduled for 9:00. To the right, there's a 'Reference Calendar' showing a grid for August and September 2009. Below that is a 'Supporting Records' section with a record for '12:02am Incoming Call From, POWELL, Mark C re: MVA'. At the bottom, a 'ToDo's' list for Tuesday, August 11, includes tasks such as 'Prepare, File and Draft NOM- Able vs. Powell', 'Serve NOM and Supporting Materials- Able vs. Powell', and 'Draft and File Chambers Record- Able vs. Powell'. A 'Staff' list on the right shows names like Alice Z Cooper, Betty A Smith, and Mark C Powell with their respective initials.

The screenshot displays the 'ToDo's' interface. At the top, there's a navigation bar with 'GoTo' and 'Filter' options. Below is a table of tasks with columns: 'All', 'To Assemble', 'To File', 'To Invoice', 'T1 E-Stat', 'T2/T3-TM', 'My ToDos', 'ToDo's in Review', 'T1', 'T2', 'T3', 'T4', 'T5', 'YE', 'Audit', 'Misc', 'Ready For Review', and 'Delegated Out'. The table lists tasks with due dates and descriptions. On the right, a detailed view for task 'T2' is shown, including fields for 'Due: 8/11/2009', 'Staff ID: UT', 'Priority:', 'Client Info: Case Computing Services Inc.', 'Partner: PAR', and 'Status: Not Started'. There are also buttons for 'Add Note', 'Add Email', 'Add Phone', 'Add Docs', 'Add Web', 'View/Edit ToDo', and 'Add ToDo'.

- Tasks that are being tracked can be found under their own categories like T1, T2, etc. and items ready for review by Senior partners, can be tracked and processed.
- Notes, emails, documents, etc. can be generated from the ToDo area as well as from the Contact List.

Powerful Document Management

Built right into Time Matters is a powerful document management system. This system allows you to assign documents such as Word, Excel, Adobe Acrobat, etc to Contacts.

Along with this capability is the ability to track documents and assign documents for review from within the office. There is even a check-out and check-in function which will allow you to manage document copies being revised outside of the office.

You can even generate documents automatically from Time Matters merging contact information with ease.

Additional Features – Too Many to list

- Integration with popular accounting programs such as PCLaw, Juris, Quickbooks and others
- Multi -User system using the powerful Microsoft SQL database.
- Powerful customizable reporting features, using built in report generation or free third party report generation utilities
- Additional capabilities built in for larger projects where you wish to track information under that project rather than under a contact record.
- Integration with Microsoft Office products like Word, Outlook , Excel, Powerpoint and others
- Integration with Adobe Acrobat
- Completely customizable forms and fields
- Customized User Manual

Still not convinced?

This software has too many features to display here.

Pricing is based upon the number of users and the level of customization that your organization requires. Please contact us for a demo and quote on this powerful software.

If you desire more information, please contact Case Computing at 604-357-7030, or email us at info@casecomputing.com. We look forward to serving you.