

Customer Story: Benefits of Modern Time Tracking and Billing



More and more businesses are making the switch to modern time tracking and billing to better manage their operations. Read this customer's story on her experience using Bill4Time and how it provided solutions to bottlenecks in their business.

The [Environmental Design Partnership](#) has been serving the Capital Region in upstate New York, for over 40 years. The thirty member multi-disciplinary consulting firm established in 1977, specializes in civil environmental engineering, consulting, landscaping, architecture, and land surveying.

Their motto, "Shape the physical environment," embodies the ways in which they are making the world a better place.

Pain points:

In 2016, the executive team decided that they needed to modernize their time tracking and billing operations.

One of the key features for billing and tracking software to be effective is the ability to search and sort various clients and projects in the most efficient manner. If it takes more time to search for the invoice than it takes to communicate with the client, that's a problem.

Kimberly McAlonen, the office manager at EDP LLP, was hired when they were transitioning to Bill4Time's platform. She had to learn two different software suites at the same time. Her personal experience with both tools cemented the value of Bill4Time in her eyes.

The firm's previous solution was weighed down by an outdated interface and a bulky typewriter aesthetic. Instead of helping her effortlessly send out invoices to clients and generate reports for everyone to review, she found herself overwhelmed.

"I couldn't search key words at all, I had to know the client, and sometimes the checks would come in with different names on it. So I'd have to go around the office asking, "Who owns this check?"

It also didn't help that the solution lacked a cloud computing element, requiring Kimberly to manually backup their data quite frequently.

"We have 25 users so, when you're trying to backup, you couldn't do it at certain times of the day, because there were so many people working on the old system."

The old software was not intuitive, and despite training on it for a month, Kimberly found herself desperate to implement Bill4Time.

"It was very clunky. It was like a database. I'm sure it had very good searches and reports and everything, but for me, going in brand new, and I never had done billing before either, it was very overwhelming to me. I did have a trainer and he did train me for a good month, two months. But then, when we started transitioning, I begged. I said, 'Let's change now.' And we did.

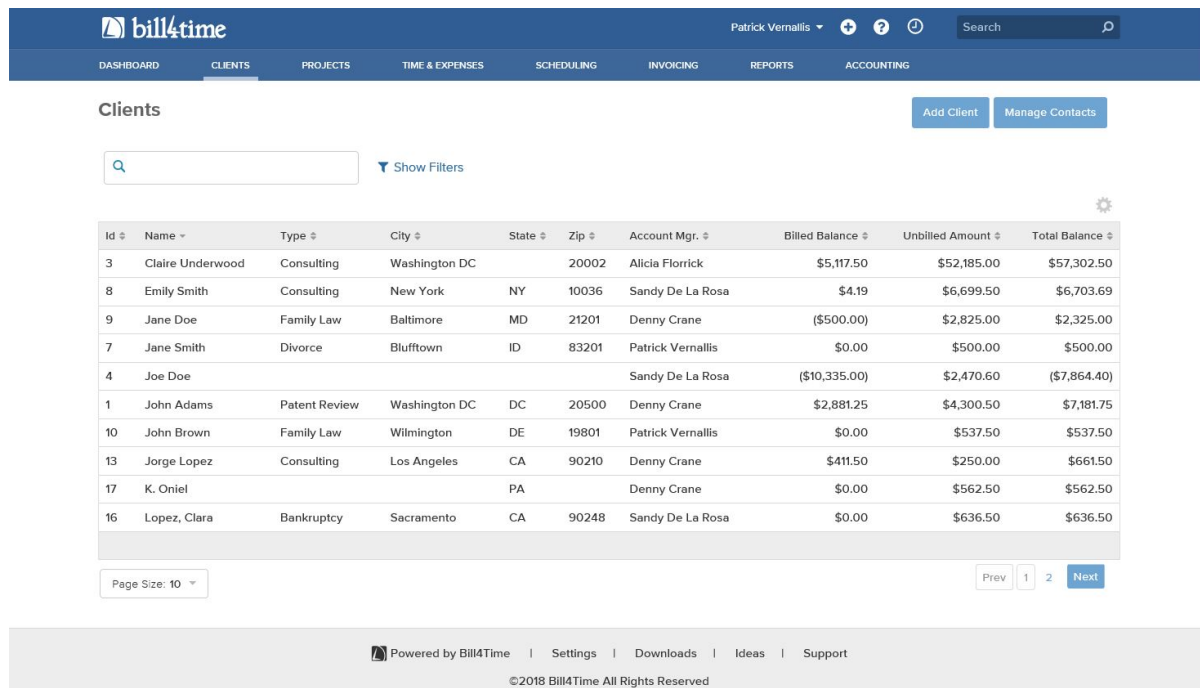
I had worked in another place before that used other software which was Windows based, not online, or a cloud solution. I knew there was something better out there for EDP, and Bill4Time was it.

When it came to the rest of the firm, I was met with resistance to a new software. The fear was that it would be a pain to learn a new solution all over again."

Implementation:

As creatures of habit, change can be scary, but EDP just said to their staff, “This is what’s going to happen. We’re updating.” And they just switched, cold turkey.

Bill4Time reached out to Kimberly and her colleague Travis (who manages the IT related tasks in the firm), and set up a data import for the firm. Bill4Time also migrated the old accounting process into the new system.



The screenshot displays the Bill4Time web application interface. At the top is a navigation bar with the Bill4Time logo, a user profile for Patrick Vernallis, and a search bar. Below the navigation bar is a secondary menu with tabs for Dashboard, Clients, Projects, Time & Expenses, Scheduling, Invoicing, Reports, and Accounting. The 'Clients' tab is currently selected. The main content area shows a list of clients with a search bar and a 'Show Filters' button. The client list is presented in a table with columns for Id, Name, Type, City, State, Zip, Account Mgr., Billed Balance, Unbilled Amount, and Total Balance. The table contains 16 rows of client data. At the bottom of the table, there is a 'Page Size' dropdown set to 10 and pagination controls showing 'Prev', '1', '2', and 'Next'. The footer of the application includes a 'Powered by Bill4Time' logo, links for Settings, Downloads, Ideas, and Support, and a copyright notice for 2018.

Id	Name	Type	City	State	Zip	Account Mgr.	Billed Balance	Unbilled Amount	Total Balance
3	Claire Underwood	Consulting	Washington DC		20002	Alicia Florrick	\$5,117.50	\$52,185.00	\$57,302.50
8	Emily Smith	Consulting	New York	NY	10036	Sandy De La Rosa	\$4.19	\$6,699.50	\$6,703.69
9	Jane Doe	Family Law	Baltimore	MD	21201	Denny Crane	(\$500.00)	\$2,825.00	\$2,325.00
7	Jane Smith	Divorce	Blufftown	ID	83201	Patrick Vernallis	\$0.00	\$500.00	\$500.00
4	Joe Doe					Sandy De La Rosa	(\$10,335.00)	\$2,470.60	(\$7,864.40)
1	John Adams	Patent Review	Washington DC	DC	20500	Denny Crane	\$2,881.25	\$4,300.50	\$7,181.75
10	John Brown	Family Law	Wilmington	DE	19801	Patrick Vernallis	\$0.00	\$537.50	\$537.50
13	Jorge Lopez	Consulting	Los Angeles	CA	90210	Denny Crane	\$411.50	\$250.00	\$661.50
17	K. Oniel			PA		Denny Crane	\$0.00	\$562.50	\$562.50
16	Lopez, Clara	Bankruptcy	Sacramento	CA	90248	Sandy De La Rosa	\$0.00	\$636.50	\$636.50

Travis put together the spreadsheet of data, then passed it to the Bill4Time team. Kimberly felt the database import worked really well, especially because Bill4Time was able to maintain a familiar taxonomy attached to past projects that made it easy for staff to identify those same items in their new system.

With the transition to Bill4Time, EDP brought over existing (long) project codes. The new projects, which follow a new numbering sequence with shorter ID numbers, created a contrast between the data that came from the old system and what is new. The transition, and added contrast, provided Kimberly and her team the opportunity to clean up issues stemming from the *old* system. She was able to go through, and easily clean up closed projects.

Unexpected Benefits:

Whenever you add a new tool or system, you’re required to learn a new way of doing things. One of the things that surprised Kimberly, as she was training the employees of EDP LLP to use Bill4Time, was how the flexibility of the software

allowed their staff to continue many of the techniques they had become accustomed to when tracking their time.

Kimberly shared, “Of course, as you know, there are many different ways of doing something. Everybody taught me something new. Every day, as I was showing them how to do it, they would say, ‘Oh, well I do it this way...’ and I’m like, ‘Oh! Yeah! You can do it that way!’ “

Another unexpected benefit for Kimberly when getting up to speed with Bill4Time?

“The support has been amazing. Ahhh-mazing. You guys have been great. That’s another reason why I would never switch. “

Adopting time tracking and billing software, isn’t always simply about the employees. It can also be an adjustment for the firm’s clients.

In the case of EDP, the clients accepted the new solution really well.

Kimberly loved that.

“They get to see our logo in color. If they need to contact me, my email is right there on the top. They call or email. It’s a fresh new look. Very updated from what we were using. The invoice numbers are amazing. Everybody writes down their invoice number, and it makes putting in the checks when I receive them, so much faster.”

Kimberly loves the new payments workflow, updated in March of 2018. Now when Kimberly has the task of putting in the checks, she goes into invoicing, puts the invoice number in, it comes right up, she clicks on that, and then she can hit payment within the invoice itself. The amount of the invoice even populates for her.

Receive Payment

Client:

Search

Date:

02/02/2018

Project:

All

Method:

Check

Amount:

\$0.00

Reference #:

Notes:

Unpaid Invoices

Amount Remaining: \$0.00

Invoice	Date	Project	Total	Balance	Applied Date	Applied Amount
There are currently no unpaid invoices						

Save

Save & Duplicate

Cancel

How does Bill4Time save you time?

Previously, at the end of the month, having to review the reports and correct mistakes in the pre-build stage, this made for a long, long, process – close to two weeks for Kimberly to update all of the firm’s time entries to make corrections or add detail.

Now?

“Actually it takes one week now and only because I give people 5 days to look over their information. Otherwise, they would only take 3 days. It’s my time, I do all of their changes. We don’t ask them to do the changes.

I have had some errors go out yes, but again, this is very important. It’s very easily changed when you find your mistake. Our clients have been very good about changes and amendments to their invoices.”

Advice for other firms looking for a new time tracking and billing solution?

“If you’re looking for a new system, my advice would be to search it out, and be very detail oriented. Look at the many different things that would fit your place of work.”

What's the biggest value for Kimberly when her firm switched over to Bill4Time?

"Time saver – My time is money. With Bill4Time, I can focus on other important tasks that need my immediate attention in the office. In fact, I just trained our hydro-geologist, and he picked it up in 2 seconds."

[Try Bill4Time for free.](#)