

# 2016 Review of ImagineTime Time and Billing

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From the [2016 reviews of Time and Billing systems](#).

## **ImagineTime Time and Billing**

**877-520-1525**

Best Fit: Aimed at both accounting firms and law firms, ImagineTime is well suited for firms of just about any size. The product is available as a desktop installation or a cloud version hosted by ImagineTime.

### **Product Strengths:**

- Product offers a simplified user interface for users not utilizing other ImagineTime applications
- Product integrates with several tax software applications including Lacerte, Drake, ATX, ProSeries, and UltraTax
- Offers QuickBooks integration
- Offers a strong selection of add-on modules

### **Potential Limitations**

- Product can become expensive for larger firms with multiple users

ImagineTime offers a comprehensive time and billing software product that can be used as a stand-alone product, or in conjunction with other ImagineTime applications to create a complete practice management solution. The product is available in both desktop/network configurations as well as a cloud-based application.

### **Basic System Functions – 5 Stars**

ImagineTime is available as a traditional desktop installation as well as ImagineTime Cloud, which provides access to the product from any location with Internet access. ImagineTime offers users the choice between the standard menu and the ImagineTime Lite Menu, which provides a more simplified user interface to those not currently utilizing other

ImagineTime features. Both menus use a ribbon-style menu, with the simplified version displaying fewer menu options and the ribbon menus are easily customizable to suit the needs of the user. Along with Time & Billing, ImagineTime also offers Practice Management, Work Flow, and Due Date Management modules. Mentioned earlier, users can opt to simply use the Time & Billing function as a stand-alone product, or utilize all of the features available.

Managers can set up default billing rates for all staff, and also assign permissions and other options for each staff member, ensuring that they only have access to necessary data, and not confidential information.

The latest version of ImagineTime offers a variety of product updates, including the addition of a mobile app that is available for both iPhone and Android smart phones and tablets. The ImagineTime Calendar has been updated as well, with an enhanced appearance, new calendar icons, and the ability to shift between differing calendar views. Reporting options have been enhanced as well with the addition of a tree view that allows users to view all system reports by function and description.

### **Time Management Capabilities – 5 Stars**

ImagineTime's Time Expense Entry interface offers users access to a variety of functions which include access to both after-the-fact time entry as well as slip timers. Entering after-the-fact information is easy, with users simply choosing the client name, task, code, staff rate and date of engagement. After selections are made, users can simply enter their time and add any notes to the entry if desired.

ImagineTime also offers system timers that users can employ, with the ability to deploy multiple timers simultaneously. Users can simply add a new timer, select a client and begin the timer. All active timers will be displayed on the user's screen, with the ability to pause a clock if desired. Users can simply click on the Finish tab to stop the time, and also have the option to stop all timers as desired. Billing entries are automatically created in ImagineTime once each timer is stopped.

For those using the optional Calendar function, users can also create time entries directly from calendar appointments.

### **Invoicing Functions – 5 Stars**

ImagineTime's billing dashboard is the area where all billing is processed. The interface displays detailed information on all transactions entered that are ready to be billed, with an unbilled amount displayed next to each client. Users can also use the Quick Find option when they want to bill a particular client. When billing, users can choose from a variety of bill types, including Narrative Slip, General Retainer, Detail Slip, Super Bill and Bookkeeping, with all available options displayed in the drop down menu. Users can choose to run a WIP Summary or a WIP Detail report by client, so they can

review what makes up each balance displayed on the screen. All invoices must be previewed and/or printed prior to being posted in the system.

### **Management Features – 5 Stars**

ImagineTime's Reporting tab offers users access to all daily and monthly reports, as well as individual reports such as Client Aging and an Activity Reconciliation report. The Client Time and Billing History Report provides users with an excellent overview of all client time, and can be run as client time history, condensed time history and billing history. Users can also run transaction reports for both invoices and payments, as well as daily/weekly time and expense reports and staff and client performance reports. There are also a variety of activity reconciliation reports including billing activity, work in progress activity, and new activity. For those desiring a custom report, the Custom Report Wizard is available.

### **Integration/Data Management – 5 Stars**

ImagineTime offers both basic and advanced QuickBooks integration, with basic integration allows easy exporting of data into QuickBooks, where advanced integration allows users to post ImagineTime invoices directly to QuickBooks. The product also integrates with several popular tax software applications including Lacerte, UltraTax, ProSeries, ATX, and Drake, with users able to import client names, addresses, and other contact information. The addition of the new mobile app allows both iPhone and Android smartphone/tablet users to access the product remotely. An optional Customer Relationship Management application offers integration with Microsoft Outlook and also offers an email blaster ideal for communicating with clients.

### **Help/Support – 5 Stars**

ImagineTime offers three levels of product support; Silver, Gold, and Platinum, each with varying options available. The ImagineTime Manual is available as a PDF that can be accessed or downloaded as needed. There are also a variety of instructional videos, Help and FAQ's to browse. Product users can quickly access the Help function by clicking the F1 key on the user's keyboard.

### **Summary and Pricing**

ImagineTime offers excellent time and billing capability, as well as access to a series of related applications for a complete practice management solution. Pricing for the desktop version of ImagineTime starts at \$295 for a single user.

ImagineTime Cloud starts at \$30.00 per user per month. Optional modules including Finish Line, Workflow, Document Management and Calendar and Contact Management are available at an additional cost.

**2016 Overall Rating - 5 Stars**

