2012 Review Of ImagineTime Practice Management

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CREATED: AUGUST 29, 2012

Related Terms

- **Review-Practice Management/Time & Billing**
- **Time & Billing**
- **Practice Management**

ImagineTime, Inc. — ImagineTime Practice Management
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From the **Sept. 2012 review** of Time & Billing Systems.
Best Fit: Small and mid-sized professional practices looking for integration of time and billing with their tax compliance system.
Strengths

- Integration with many professional tax systems and QuickBooks
- Interface and navigation similar to Microsoft Office programs
- Calendar and appointment synching with Outlook
- Multi-staff calendar views

Potential Limitations

- No vacation accruals management or payroll integration

ImagineTime offers a variety of practice management and productivity systems for several industries and professions, including one specifically for tax and accounting firms. The system includes strong calendaring and schedule management features, along with modules for due date management, vendor and client management, and document management.

Basic System Functions: 4.75 Stars
The accounting professional version of ImagineTime was designed specifically for these firms, and make up most of the overall base of ImagineTime users. The system is built on the Microsoft Access platform and uses the familiar Microsoft Office ribbon navigation structure. This means that most users should be able to gain proficiency with basic system functions quickly. An alternate menu-based navigation is also available, as are numerous hot-key shortcuts.

The main interface offers a tabbed view of functions and features that are available to the user based on their role and access rights. As mentioned previously, the navigation menus at the top of the screen are similar to those found in Word or other Office programs, with activities divided into groups for Clients and Contacts, Time and Expenses, Billing, Collections and statements, Calendar and Due Dates, Reporting, Setup and Utilities, and access to Adobe Acrobat functions. Users can also customize this ribbon and create a favorites list, and can set password protections on options. In addition to user-level access rights, ImagineTime now comes with a "Lite" feature that can be used by staff who need access to only simple time and billing functions.

The system allows multiple screens and functions to be open simultaneously, which means users can easily switch between time keeping, client screens, scheduling, document management or other tasks, without having to close out of previous screens. ImagineTime is available primarily as an installed program, but is now also available as a hosted application, allowing remote access from any location and reducing the IT burden on a firm.

Time Management Capabilities: 4.5 Stars
ImagineTime's has three methods for performing time tracking, including timer sheets for live recording of tasks as they are in progress, an after-the-fact entry screen, where an authorized user can enter time for him or herself as well as multiple other staff members, with all displayed on a single spreadsheet view. This screen includes auto-fill features and selection lists for clients, projects, tasks, expenses, expense markups and other details.

Additionally, a calendar push feature can transfer appointments into time sheets. Multiple timers can be open and running, or paused, simultaneously, reflecting the reality of the multi-task office. When a timer is closed, the system then generates a time sheet for the task, with users able to edit the entries, adjust time, make notes or assign as billable or non-billable.

The program's project management capabilities are focused on client engagements and include subcategories for specific tasks. Reports are available for comparing actual versus budgeted time by engagement, task, staff, client and type of work. Since ImagineTime offers multi-level user rights access, firms can also implement an approvals/sign-off process through which supervisors can approve time and expense sheets for their staff.