

"Review of Time & Billing Programs"

The CPA Technology Advisor

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ImagineTime's Time & Billing program is targeted at smaller accounting firms and it gets the job done. There is nothing fancy about this product, but we accountants don't like fancy, we just want something that works. ImagineTime fits this mold.

Ease of Use: ★★★★★ (5.0)

ImagineTime has an intuitive user interface that is easy to learn and understand. Like other time and billing systems on the market, the design is simple yet effective. The user-friendly icons on the tool bar allow the user to easily navigate through the different sections of the product. The first screen you come to has four main buttons, Data Entry, Reports, Utilities and Management Reports. Once you decide the area you want to enter, you are off to the races.

Menus throughout the product are customizable. This is a nice feature because not all firms will take advantage of all of the utilities of the product. This makes the user experience much more pleasant when the screen is not cluttered with menu icons that are not being used.

If you are a power user and need to access multiple areas at one time, ImagineTime allows you to resize the windows to allow the user to see more than one set of information concurrently. This is a nice trick once you get more familiar with the program. If you are still used to the old DOS keystrokes and don't like to use your mouse to click icons, ImagineTime has shortcut keys for all menu items throughout the program.

Users will have no problem setting up clients, nor will they have a problem learning the workflow of entering time and expense entries. The system also has a timer that will allow users to track time via a stopwatch and then automatically transfer the time worked to the time entry.

MANAGEMENT FUNCTIONS & REPORTING: ★★★★★ (4.0)

If you are a manager using this product, you will appreciate its simplicity. Reports are separated into three primary groupings: daily, weekly & management reports; transaction reports; and staff and client performance reports. The reporting features in ImagineTime allow you to analyze the productivity of your practice in many different ways. Staff reports include chargeable versus non-chargeable time reports.

The standard report templates included in the product are useful and don't need much modification at all. These reports were designed well. If you need to create a custom report, the Report Wizard allows you to easily create tailor output based on the data fields in the system. All reports can be exported to Excel if you would like to analyze the data more.

Optional features that need to be considered are the due date monitoring module, contact manager & staff calendar module and the remote office time entry module. These modules are not included in the standard product, but can be added at any time. See the company's website to learn more specific details about these features.

BILLING PROCESS: ★★★★★ (5.0)

The billing process in ImagineTime starts with a dashboard that lets the user know what clients need to be billed. This is a great feature to make sure you get your bills to your clients. From this dashboard, the user simply clicks on the entry that needs to be billed and the billing process begins. Next the user will select the type of bill that needs to be sent (retainer, initial, progress or final bill).

The system then takes the user to a text editor where the user can customize the bill. Customization is very easy since an easy-to-use text editor is available. Once the content of the bill has been edited, the format of the bill can be changed as well. These changes can be made in the firm set up phase or at the individual invoice phase.

For complex billing situations, ImagineTime has a process called Super Bill. This function allows users to compile complex billing issues into one bill. You can bill for tax and audit work in the same bill when using the Super Bill process. This allows firms to get the bill to the client in a much quicker and simplified manner.

The system also allows for firms to send detailed statements, which is a nice feature when you have multiple invoices for one client. Firms can email bills or print them out for mailing.

INTEGRATION: ★★★★★ (5.0)

ImagineTime integrates with QuickBooks, Lacerte and UltraTax CS tax software. Additionally, the product has integration capabilities with Microsoft Office products such as Outlook, Word, Excel and Access. If your firm accepts credit cards or ACH payments, ImagineTime can also process these transactions.

SUPPORT & HELP: ★★★★★ (5.0)

Users can access help anywhere in the product by hitting F1. The help menu will be able to answer most of your inquiries due to its comprehensive nature. There are three levels of customer support available, as well as online tutorials.

RELATIVE VALUE: ★★★★★ (5.0)

ImagineTime is a quality time and billing product for tax and accounting firms. Its straight forward design and navigation, in combination with reporting features, make it a product that most small to mid-sized firms should consider when making a decision to purchase a time and billing system.



2009 OVERALL RATING:
