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877-520-1525

[www.imaginetime.com](http://www.imaginetime.com)

**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

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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

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### **Invoicing Functions: 4.75 Stars**

ImagineTime can be used for fixed rate or hourly billing, as well as for billing for expenses with or without pass-through markups. The billing console offers a list of clients and account balances, with details on unbilled invoices, WIPs and other data. Users can quickly select the client invoices they want to post, individually or in batch, after which they can print the invoice, or generate it to PDF and email it from within the program.

A word processing function similar to Word offers customization of documents. For clients that are billed based on a fixed or flat periodic rate, the program offers recurring billing functions that can handle up to five fixed fees per client.

In addition to detail and summary WIPs, the system offers staff utilization reports for measuring productivity and managing budgeted versus actual time. Comparisons are available at the task and the overall engagement level, with the ability to perform budget rollovers based on budget or prior year actual.

The Billing and Collections centers in ImagineTime offer several accounts receivables management functions, including the previously mentioned billing dashboard, along with aging reports, deposit reports, bad debt entries and the optional ability to accept credit card and electronic payments.

### **Management Features: 4.75 Stars**

The primary dashboard view in the system is the Billing Dashboard, which provides a sortable and filterable spreadsheet listing of clients and their balances. Additional reporting functions include detailed and summary WIPs, client master file reports, client snapshots, firm productivity, staff utilization and histories.

Firm analytics can be performed using reports that analyze hours and dollars

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### **Integration & Data Management: 4.25 Stars**

For staff who frequently work away from the office, ImagineTime now offers a remote transfer feature that lets them record their time to a copy of the database. When the user returns or emails the data to someone at the firm, it can be synched into the main system. Synching from mobile devices is also possible since it syncs calendaring data with Outlook. The company is currently developing a mobile app.

ImagineTime can import client contact and invoice data from Lacerte, UltraTax and ATX. It can output invoices and reports into Excel, Word and PDF, and integration with Outlook allows direct emailing of from the program as well as syncing of tasks, appointments and contacts. Users can also import transactions from the GoToBilling merchant payment processing platform.

### **Help/Support: 4.5 Stars**

The program includes extensive right click menu options, as well as a traditional help utility index that is context sensitive to the task the user was performing when searching help. The company's support website offers program updates, FAQs, user manuals, implementation manuals and training videos. Live technical support is offered via tiered packages or on a per-issue basis.

### **Summary & Pricing**

ImagineTime offers strong scheduling and project management features, with impressive reporting and customization options. A single-user version of the program starts at \$295 per year. A five-user version, which can be installed on any number of actual computers on a network, starts at \$795. The new hosted version of ImagineTime costs \$40 per user per month. The optional e-payment and tax data import functions are offered at an additional cost.

## 2012 Overall Rating: 4.5 Stars

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