Practice Management suite of applications well suited for both the accounting and the legal profession. In addition to ImagineShare, ImagineTime also includes time and ...

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ImagineShare

ImagineTime

www.imaginetime.com

877-520-1525

From the 2019 reviews of client portal systems for accounting firms.

ImagineShare is a new client portal now offered by ImagineTime, a comprehensive Practice Management suite of applications well suited for both the accounting and the legal profession. In addition to ImagineShare, ImagineTime also includes time and billing, due date tracking, a CRM, and reporting and analytics. Intended as a workflow and communication platform between client and firm, the client portal makes it easy share documents with clients in a safe, secure fashion, providing a real time communications record for each client. A mobile app is also available for both

iOS and Android smartphones and tablets, with users able to access, upload, and

Accessing the Files feature will display all available documents for that client. If unsure which file is needed, a global search option is available including the ability to use key words to search for a particular file. One of the nice features in ImagineShare is the ability to view the file within the portal without downloading it, though there is an option on the right side of the screen to download the file if desired. Another nice feature is Taskflows, which allows users to connect a task to a particular document stored in the portal. Users can also add a due date to any task created in the portal, which will automatically send clients a reminder to send the document. If the client still has not sent the document, an additional reminder can be sent manually from the task screen if desired. When the client submits the requested information or documents, the user will receive a notification that the task has been completed.

In addition, clients will be able to view the status of any project, as well as who is assigned to the project. Users can also make their calendar viewable on the portal, so clients can view the calendar and request an appointment if desired.

ImagineShare offers unlimited storage capability, which allows firms to store any and all documents on the portal for easy client access to both historical and current documents. The portal supports multiple document types including forms, receipts, statements, and tax returns and is bi-directional, so both firms and clients can easily upload and download documents when necessary.

Along with the client portal, ImagineTime also offers time and billing, calendar scheduling, CRM, credit card processing, and workflow management capability, with both e-Signature and document management features added in September. ImagineTime also integrates with a variety of third-party tax software applications including Lacerte, UltraTax, ProSeries, ATX, and Drake.

Documents remain secure at all times, with 256-bit AES encryption used during

ImagineTime's practice management suite which includes their comprehensive time and billing application, and due data management capability. ImagineTime offers a variety of help and support resources including a newly enhanced knowledgebase as well as access to the ImagineTime Manual. Users can request support from the vendor's website or by using the toll-free number. Both email support and remote support sessions are also available.

ImagineShare, the client portal recently added to ImagineTime is an excellent addition to a very strong application and will drastically reduce the amount of paperwork that needs to exchange hands. The ImagineTime Client Portal is available for $25 per user, per month, based on yearly billing, or $35 for month-to-month billing. The Full Practice Management solution includes the Client Portal, Time & Billing, and Due Date Management and is available for $70 per user, per month.

2019 Rating: 5 Stars

Firm Management