

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

**ImagineTime**  
Effective Practice Management

Compatible 

toll free: 877.520.1525

877-520-1525

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

ImagineTime consists of four integrated modules: time and billing, due date monitoring, contact management and document management. The document management module is an extension of the core practice management and due date monitoring module, and as such, that is where the primary value of the document management component is based — in the integration with those applications.

The document storage system uses a traditional Windows Explorer style folder, sub-folder model. You have the ability to set up your folder template to be applied to all clients. A particularly useful feature is the ability to update the folder template for existing clients in the event you decide to add a new folder after the fact. Documents can be searched based on keywords that are tagged to the folders or based on the filename. The selected document or file is displayed in a viewer screen.

In addition to the integration with the other ImagineTime applications, ImagineTime provides integration with QuickBooks, Lacerte and ATX/TaxWise. However, this integration is not with the document management module.

You can store and retrieve MS Office files to/from ImagineTime, and the system includes a scanning utility to control scanning from TWAIN-compliant scanners.

Document security can be controlled at the user level by selectively choosing the

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

\$125 for a single-user license and increases to \$1,295 for a 50-user license.

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved