

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

www.imaginetime.com

ImagineTime, which offers practice management, CRM, due-date monitoring and time and billing systems to professional accountants, recently introduced its new Document Management system. As with the other programs the company offers, the document management program is designed specifically for professional practices.

The program works as an integrated module of the core ImagineTime system, with an intuitive interface that provides quick access to key functions, including managing clients and contacts, billing tools, calendaring, reporting and other features. By integrating advanced document management processes into the system, professionals now have tools for more efficiently storing digital files and collaborating with clients. Drag-and-drop functionality makes the program really simple to use.

Users can assign keywords to files and folders, in addition to their custom naming, to ease search functions, and automation functions can be set to automatically create certain folders and folder structures when clients are added to the ImagineTime system. Additional document management functions include built-in scanning that offers optical character recognition (OCR) technology, and the ability to save scanned documents into searchable PDFs, JPGs or TIFs. The Document Management add-on module for ImagineTime costs \$125. n

Technology

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