

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

ImagineShare

ImagineTime

www.imaginetime.com

From the [2020 reviews of client portals](#) for accounting firms.

ImagineShare is the accounting firm portal system from ImagineTime, and a part of its suite of practice management solutions. The system is best-suited to small and mid-sized accounting firms, and can be used as a stand-alone portal or as part of the suite, which includes options for project management, due date tracking, time and billing, payment processing, e-signature, CRM, reporting and analytics.

The client portals can be used on all major browsers and operating systems, allowing use on computers or mobile devices. As with all portals, ImagineShare's purpose is to enable secure sharing of documents both ways between an accounting firm and its clients. This is done on customizable screens that can be branded with firm logo on client-facing screens. The firm-side interface includes a client selection list and an activity log that shows recently performed tasks, along with options for taskflow, file information, details, contacts, staff assignments, billing functions and integration options.

Most day-to-day functions of the program are handled within the files section, which offers a view of all documents currently being stored in the client's folder,

with the ability to search within folders and view documents prior to opening them.

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

The ImagineShare system includes unlimited storage capability for client and firm files, including all traditional Microsoft Office files, data and spreadsheet files, images, PDFs and other information. Using tax season prep as an example, this allows the firm to request source documents from clients, the clients to be able to upload the documents, the firm to be able to prepare a client return and provide it for digital signature, and then the firm to provide the finalized return to the client, all in a digital and contactless manner, without the need for an in-person visit.

Data security is maintained using always-on 256-bit AES encryption and secure data centers. The system's Share Link function also helps maintain security, providing an email plug-in that makes using the portals easier for firm staff and client users.

ImagineShare integrates with other components in the ImagineTime suite, as well as with Outlook and third-party tax prep systems Lacerte, UltraTax, ProSeries, ATX, and Drake. Help and support functions include a knowledgebase and online user manual. Live phone support and remote virtual assistance is available during business hours.

ImagineShare can be a valuable addition for firms wanting a reliable and easy-to-use portal system for sharing client files. The system costs \$25 per user, per month. The comprehensive ImagineTime Practice Management suite, including the portal system, time and billing, and due date management, costs \$70 per user, per month.

2020 Rating: 4.5 Stars

Firm Management

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