

# Bill4Time

## Quick Start Guide

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### Get Started

Go to [www.bill4time.com](http://www.bill4time.com), login and you will be at the dashboard. Notice the top navigation bar.

### Set up your Settings – Firm System Settings

- Set up general preferences under the System option on the bottom of your Dashboard including what feature you will and won't use.
- Set up your accounting method in the Settings tab, and edit your Invoice layout from the Invoice Setup tab.
- Customize the various lists from the Custom lists tab.

### Additional Users – User Management

- Click Manage Users from the dashboard add new users to the system.
- Add information for that user including billings rates and HR information
- Click on an existing user to set up their permissions and which clients they have access to.

### Add some clients – Client Management

- Click Client Management to add a new client and enter in their information.
- Use the Invoice Presets tab for settings that will automatically reflect invoices for that client.
- Click on an existing client to see and edit their info, set custom billing rates, add contacts, set user access, see notes, trust accounting, and payments/invoices.

### Using Bill4Time

Create Projects (you can rename Project to anything you want from Firm/System Settings)

- Click New Project and enter relevant information. Assign the project to a user. Subscribe any users who should get alerts when the project is worked on or updated.

### Enter Time & Expenses

- Click Add Time or Add Expense from the Dashboard, or click a project to open it.
- Only the blue-shaded fields are required information.
- You can enter time, notes, and expenses from the Project.
- Use the File Cabinet tab to upload files to a Project

### Manage your Schedule

- Check today's scheduled entries from your Dashboard or go straight to Scheduling at the top.
- Click on a day to zoom in and edit that day's events.
- From within a Project you can view or add scheduled items relating to that Project.

### Run Reports

See how much a time your firm is billing, to which clients, by which employees, and much more. Just a few of the built in reports include:

- User Efficiency will give you a color-coded month view of who billed how much time each day.
- Contractors Summary reports on any employees who are paid per billed hour, and can tell you how much you owe them.

### Invoice your Clients

- Click on Invoicing and select which client you want to bill.
- Review the pre-bills, edit if necessary, and finalize. Once they are all finalized you can print and send them.

### Receive Payments

- Through Client Management or the Accounting tab on the Dashboard you receive payments and make balance adjustments.
- Choose the Account Activity report to show all history for each client from a date to/from.

*If you're using QuickBooks Accounting you may also do these functions with QuickBooks. See the support section for instructions on synchronizing with QuickBooks.*

### Do More-

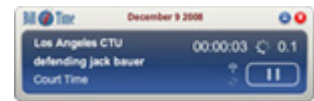
### Bill from your PDA

- Bill4Time Mobile is available for Blackberry, iPhone, PocketPC, and Palm PDA's. Go [www.bill4time.com/mobile](http://www.bill4time.com/mobile) for download instructions



### Bill from your computer Desktop

- Use our Desktop widget to bill time and expenses without a browser. Go to <http://www.bill4time.com/B4Twidget/badge.html> for download instructions.



### Join our R&D Team!

Go to [ideas.bill4time.com](http://ideas.bill4time.com) and see what other Bill4Time users are saying and suggest new features and improvements!

### Become a Bill4Time Pro

- Read the Top 20 Tips
- Browse through our knowledgebase for demos and FAQ's