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Review of Bill4Time

By Chandra Lewnau

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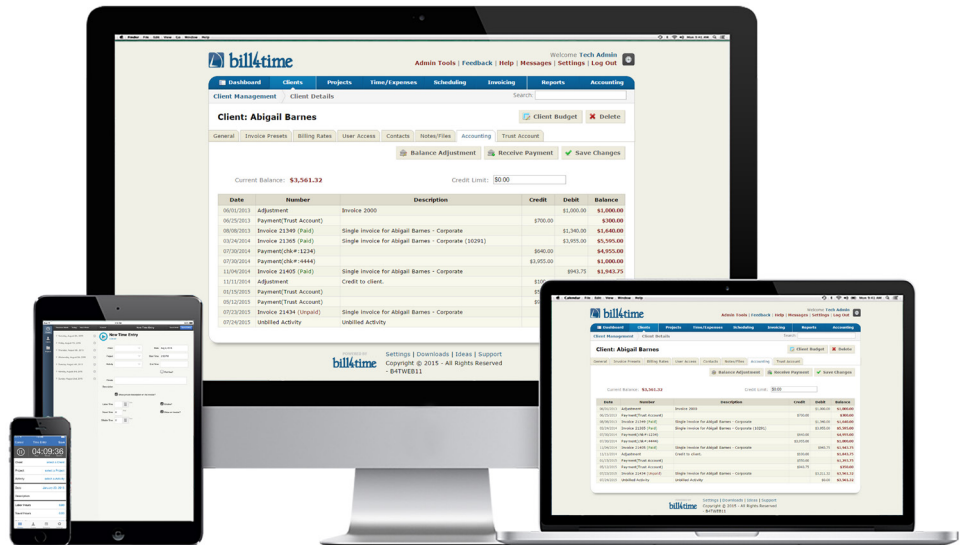
You must breathe to stay alive. Your law firm must bill to stay alive. Ideally, both should occur without much effort. In this issue of SmallLaw, estate planning lawyer Chandra Lewnau explores the deep billing feature set of cloud app Bill4Time. Chandra covers setup, the dashboards and user experience, key features such as timekeeping, invoicing, and reporting, the mobile apps, integrations, and of course the price. Should you consider Bill4Time? Read the review to find out.

Bill4Time is a cloud-based timekeeping and billing solution with law-specific features that set it apart from many other timekeeping applications. In addition to trust accounting, it offers ABA uniform task-based management system codes, LEDES billing, and conflict checking.

These features make Bill4Time ideally suited for the legal market. But this market has stiff competition both from other billing-specific products and from practice management solutions with timekeeping and billing. The SmallLaw team arranged for a complimentary Bill4Time subscription so that I could review it for you.

Getting Started

Bill4Time is a mature application. It's clear that considerable developer time and effort have gone into both the user interface and the feature set. It's easy to sign up for a free trial; no credit card is required. If you decide to keep it, there are three pricing levels for legal users.



1. Solo: This plan costs \$30 per month and \$20 for the second user. This plan limits you to 100 clients or matters and can't import data.
2. Pro: This plan costs \$50 per month for the first user and \$20 per month for each additional user.
3. Enterprise: This plan starts at \$100 per month.

While not hard to learn, Bill4Time has a large number of features and options so it pays to spend a little time with the training materials before you dive in. There is an extensive series of training videos on the Bill4Time YouTube channel that go over every aspect of the program. There is also a weekly webinar, and several user guides.

If you are migrating an existing practice, you'll want to spend some extra time getting your account set up to save you time on data entry later. If you have the Pro or Enterprise versions of Bill4Time you can import data. Pro users can import clients and projects one time. Enterprise users can import

at any time. You create an Excel file based on a template and send it to Bill4Time for import. Oddly, you must have at least 50 rows of data for an import to work. Overall, it's nice that some data can be imported, but if you are moving to Bill4Time from another system, you will largely be starting over.

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Dashboard

You start work in Bill4Time at a very user-friendly dashboard with a nice interface. You can customize it by moving the widgets around or adding new ones. I found the widgets for showing a list of matters by due date and a quick entry table for adding new time entries quite handy. The standard view lists

recent matters with a plus button on each row for quickly adding time. It also displays a graph of the billable hours for the week, hours billed for the day, and upcoming scheduled items for the day.

Bill4Time's 30+ reports are another strong feature. You can generate them with one or two clicks.... Export options include Excel and PDF.

Controlling Access

If you have staff or contractors, Bill4Time gives you a lot of flexibility in how much access you grant each user. Users can be specified as employees or contractors and can be assigned to different classes with default permissions. You can further tweak permission settings for each individual user.

These settings range from which matters the user can see, to whether they can create new matters, override billable rates on time entries, view invoices, enter time for date ranges outside the current week, and much more. This is more granular control than you will find even in many practice management applications.

Timekeeping

Tracking your time is one of the strongest features of Bill4Time. It offers an almost ridiculous number of ways to add new time entries. Clearly, a lot of thought has gone into making this process as efficient as possible.

One nice feature is the batch item entry. This screen enables you to enter up to 10 rows of billing data at a time. It gets even better if you are billing multiple entries to the same client or matter. Just check

a box to fill information from the current entry to the entries below.

If you prefer a timer, one is accessible from a clock icon at the top of every window in the app. The timer follows you as you change screens with unobtrusive flashing dots to remind you that it's still running. If you are like me and get interrupted constantly, you will appreciate the ability to have multiple timers running at once. You can keep several timers running all day and move between them pausing and restarting as you switch tasks. When you stop a timer, you can convert it to a time entry.

Once you've created a time entry, use the Save and Duplicate button to easily create related entries for the same client as an alternative to the batch billing feature. You can also enter time from the desktop app (Chrome-based if you are a Mac user), iPhone app, iPad app, or Android app. I spent a little time on the iPad and Android apps and didn't run into any glitches.

Bill4Time has flat fee billing features as well, but I admit I did not find them intuitive to use. With so many easy and flexible ways to add time — both individual entries and bulk entries — you and your staff will have no excuse for not staying on top of your billing.

Invoicing and Reporting

I haven't had to do much invoicing personally, but I've done enough to know that a good billing process can make a huge difference to a firm's bottom line and to the morale of the accounting staff.

Bill4Time handles both batch billing and one-off invoices. You can set matters to bill regularly or bill only at the end (e.g., flat fee or contingent matters) and can use those settings to filter the matters that get invoiced each month. Once you've set your filters to

create your batch of bills for the month, you can go back and add more invoices to it.

Clicking any invoice in the batch takes you to a screen on which you can edit the invoice. Clicking any line item in the invoice lets you edit that item. You can set things like bill notes for the account as well as manually override these settings. Bills can be finalized with the click of a button. And you can print to PDF or email them to clients. Bill4Time offers trust accounting so you can accept payments, apply payments from the invoice screen, and more. This is all fairly standard, but works well.

Bill4Time's 30+ reports are another strong feature. You can generate them with one or two clicks. Reports include payments received, new matters, work in progress, inactivity, write-downs, and A/R aging. You can customize each report with relevant filters such as time range, matter, client, or staff. From any report screen, you can click on each entry to edit it. Export options include Excel and PDF.

As I used Bill4Time, I became more and more impressed with the program's capabilities. The billing features are as strong as or stronger than those in the cloud-based practice management solutions I have tried.

Wish List

With law firms using so many cloud services, integration has become important. Bill4Time falls short on this front. For example, clients can click a link to pay their invoice but

only via PayPal or Stripe, which many clients may not think of as a professional-caliber service. However, Bill4Time will soon integrate with LawPay, one of the largest legal-specific credit card processors. Let's hope this is the first of many integrations.

Bill4Time offers a scheduling feature that enables you to enter events and create billing entries from your events, but the limited feature set of the internal calendar and inability to sync your existing calendar make it almost useless. Currently, you can create a link to view but not edit your Bill4Time events in Outlook or Google. You cannot view a Google or Outlook calendar in Bill4Time. I would like to see Bill4Time add two-way sync with Outlook and Google so I could view my main calendar in Bill4Time and create time entries from existing appointments with a single click. This would put

Bill4Time more on par with practice management solutions. This too is on the Bill4Time roadmap.

I didn't try the QuickBooks Connector, but the help materials suggest that it's also unidirectional from Bill4Time to QuickBooks. If Bill4Time synced both ways with QuickBooks, a good calendar, and address book, it could function as a component of a robust do-it-yourself practice management solution.

TechnoScore

As I used Bill4Time, I became more and more impressed with the program's capabilities. The billing features are as strong as or stronger than those in the cloud-based practice management solutions I have tried. Likewise, these tools are more user-friendly than many of the desktop-based programs. For example, I found Bill4Time much more robust than

the billing features in MyCase, the last cloud practice management app I tried.

Who would gain the most from using Bill4Time? Solos and small law firms that need sophisticated billing functionality but choose not to use practice management software either because they just don't need it or because they have cobbled together a working solution from other standalone products.



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