Simplify Statement Generation with Bill4Time's Enhanced Statements Feature



Bill4Time is thrilled to announce the launch of our enhanced Statements feature.

This new update empowers law firms to generate more detailed and tailored client statements, streamlining the billing process and improving client communication.

With the enhanced Statements feature, Bill4Time now offers the convenience of directly emailing these statements from within the platform, saving time and effort for busy legal professionals.

Introducing the New Statements Tab: A Convenient Space for Statement Generation

To make the <u>statement creation process</u> even more efficient, Bill4Time has enhanced the statements tab on the main navigation bar. This tab provides users

with a convenient space to create new statements as well as access previous ones.

The new — but familiar — statement creation process follows a similar flow as the previous feature, but it has added functionality for greater statement customization and flexibility.

Email Statements Natively in Bill4Time

One of the standout additions of Bill4Time's enhanced feature is the ability to promptly <u>email statements to clients directly from the platform</u>. This offers law firms the choice to send statements as a PDF attachment or as a link for viewing in the client portal.

With this convenient option, legal professionals can effortlessly share statements with their clients, improving communication and ensuring timely delivery of invoices. Before you start, make sure to configure Statement email settings.

Stay on Brand With Customized Statement Email Settings

Before utilizing the email functionality, it is important to ensure that the <u>Statement email settings are properly configured</u> to meet the specific requirements of your law firm. For law firm branding purposes, you can add your law firm's information (company name, street address, phone number, etc.) on each statement, maintaining a clear and consistent look for clients. Within the Settings tab in Bill4Time, you can customize the email delivery method for all statements.

Additionally, you have the flexibility to designate both the recipients and sender for the statement email distribution. This allows you to streamline the emailing process and ensure that statements reach the intended recipients in a timely manner.

Optimize Statement Delivery With Multiple Formats

When sending statements via email, you can choose to send the statement as a PDF attachment or as a link that will automatically redirect your clients to the

client portal for viewing the statement. This flexibility allows you to cater to your clients' preferences and optimize the delivery of statements.

Increase Client Satisfaction Through Flexibility

With Bill4Time, users have expanded options to tailor statements for multiple scenarios.

This includes selecting the date range, specifying the statement creation date, and the flexibility to include all unpaid invoices that fall outside the selected date range for each specific client. These customization options allow law firms to create statements that are more detailed and tailored to their clients' needs.

Improve Billing Organization With Easy Access to Generated Statements

Following the recent enhancements, all created statements are now conveniently located within the 'View Statements' tab.

Statements generated within the last 30 days are accessible in the 'Recent Statements' table, while all historical statements are cataloged in the 'Statement History' table. Users are provided with efficient filtering options to easily locate specific client statements.

Additionally, each statement PDF is readily viewable within the Bill4Time platform, eliminating external windows and keeping work in the platform.

Increase Productivity With Bulk Statement Sending

Bill4Time provides users with the flexibility to send statements individually or in bulk, depending on their workflow and preferences. You can easily <u>email or view a single statement</u> directly in Bill4Time.

For law firms that need to send multiple statements simultaneously, Bill4Time offers the option to select multiple statements from the Recent Statements or Statement History tables and click the email icon at the top right of the table.

This will send each individual statement to its respective recipient. The Subject and Body fields will inherit the default settings configured in your Statement Setup under Settings.

Make Legal Billing Easy With Bill4Time

Bill4Time's enhanced Statements feature provides law firms with a comprehensive solution for generating detailed and tailored client statements.

With the ability to customize statements, conveniently access generated statements, and streamline the emailing process, legal professionals can save time and improve client communication. By leveraging this feature, law firms can enhance their billing process and deliver a superior client experience.

<u>Schedule a demo today</u> to discover the power of Bill4Time's enhanced Statements feature and transform your law firm's billing workflow.