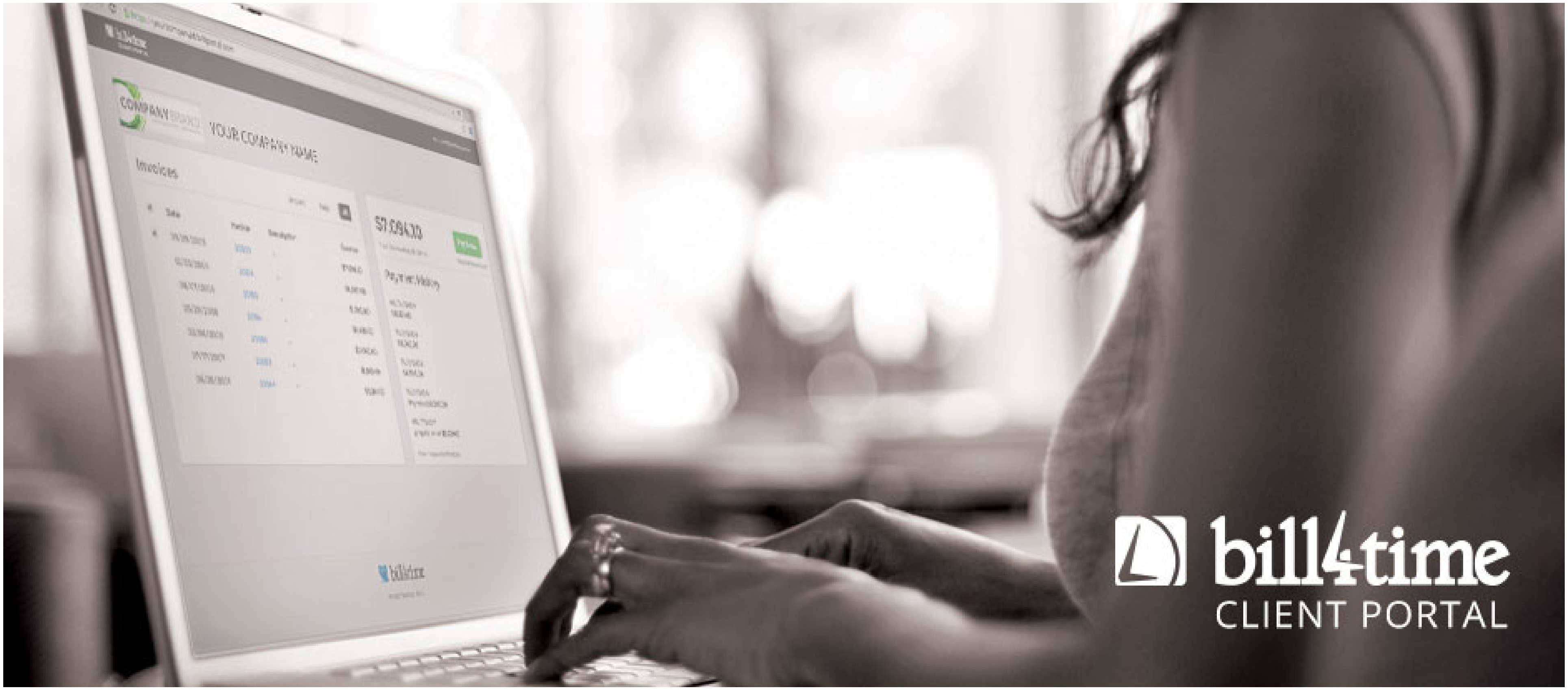


QUICK START GUIDE

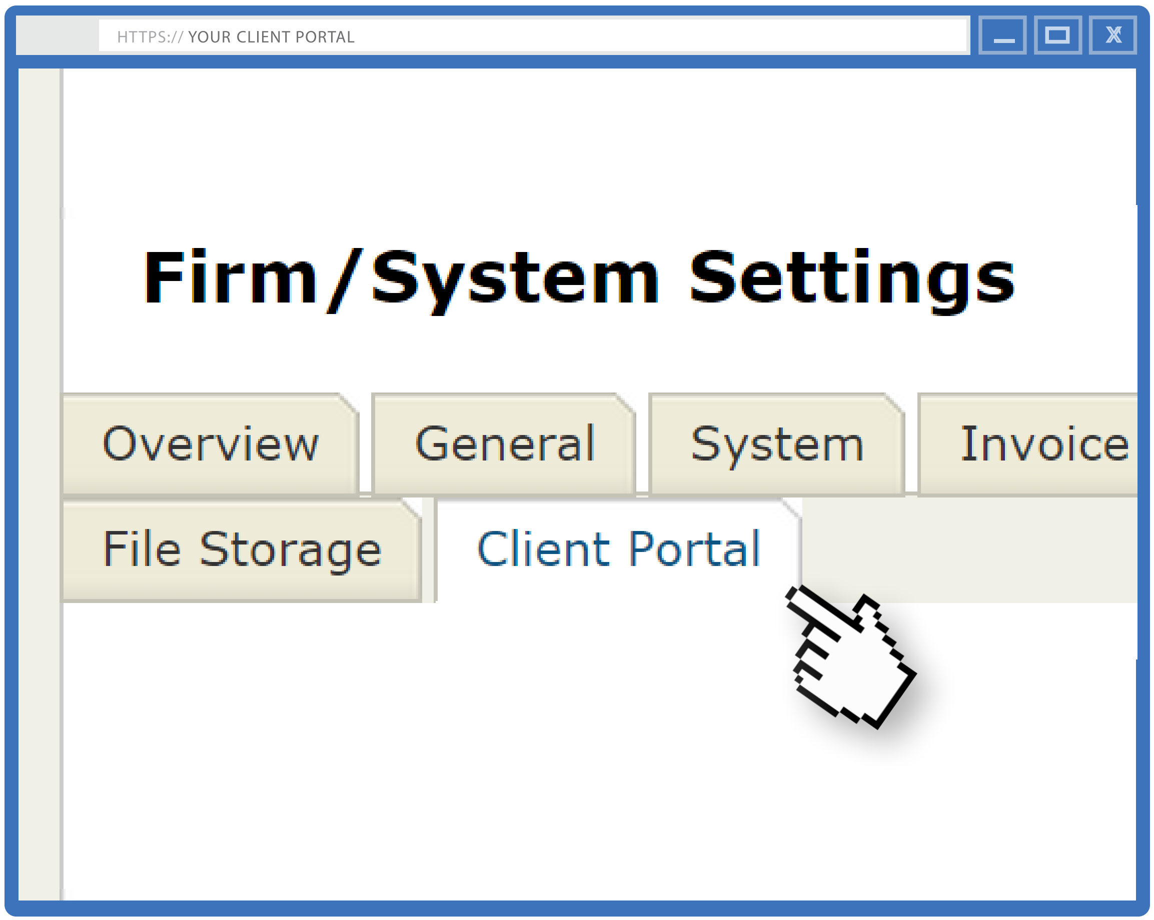
From start to finish, admin to user, we will quickly cover each topic in your new Client Payment Portal.

This should only take a few minutes, we promise.

February 2015 QSGV.150209.1

Log Into to Your Client Portal

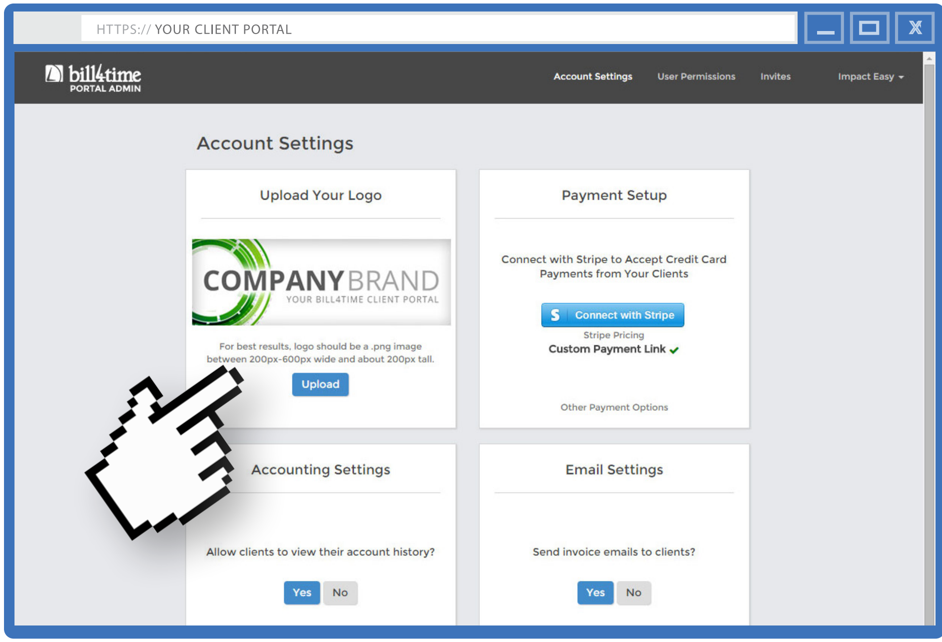
You will find your Client Portal in your Bill4Time account under Settings.



- or -

***YourFirmID*.b4tportal.com/admin/login**

Use your Bill4Time email and password to login



Upload Your Logo

For best results, your logo should be a PNG image between 200px and 600px wide and about 200px tall.

Pick a file, upload and you're done!

Let's Configure Your Payment Options

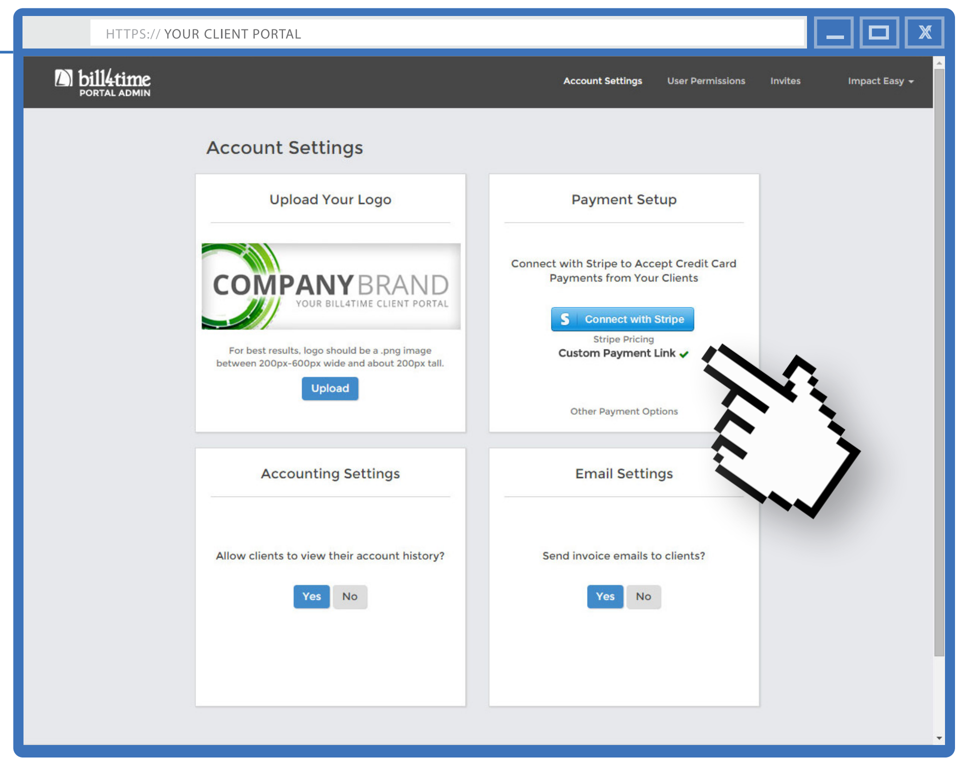
stripe

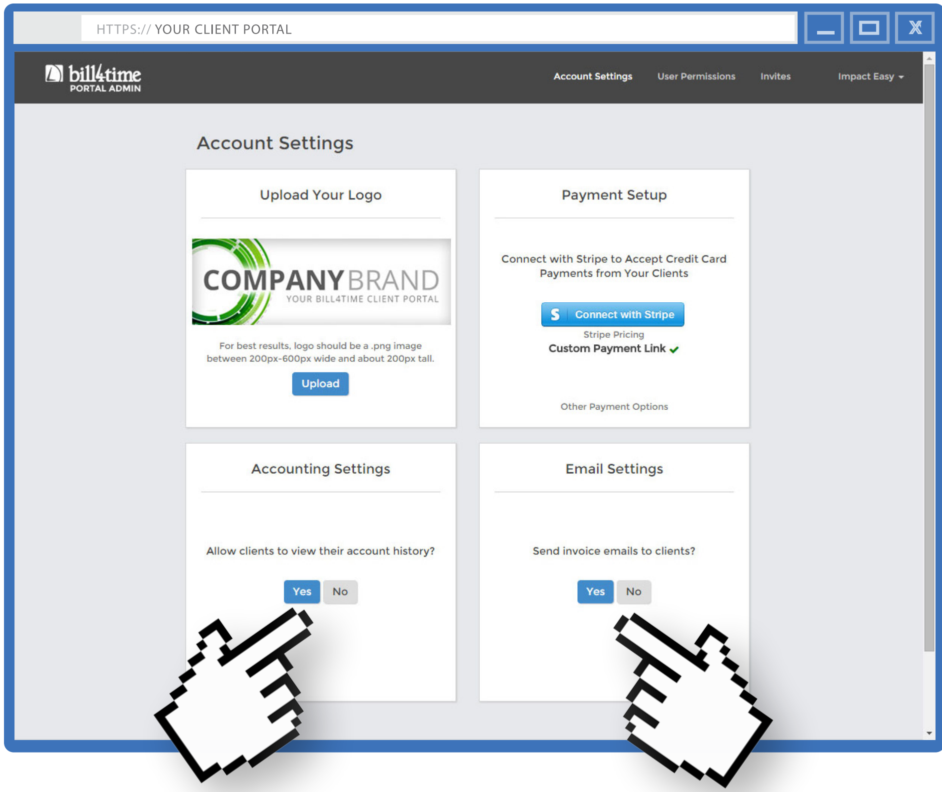
Stripe is the premier credit card processor that allows your clients to pay with ease. With a full integration, your client will always stay in your portal.

Not a stripe user just click the "Connect with Stripe" and you'll be set within minutes. More info - https://stripe.com/us/pricing

PayPal

Options are always good. If your client uses PayPal, they can have that option as well or you can link to an outside payment site.





Client Settings

Before you start inviting your clients to your new payment portal, take a few moments to determine the following options:

ACCOUNTING SETTINGS

Allow your clients to view their history of invoices or keep it strictly to payments.

EMAIL SETTINGS

When you create an invoice you can choose whether or not to automatically send an email notification to the client.

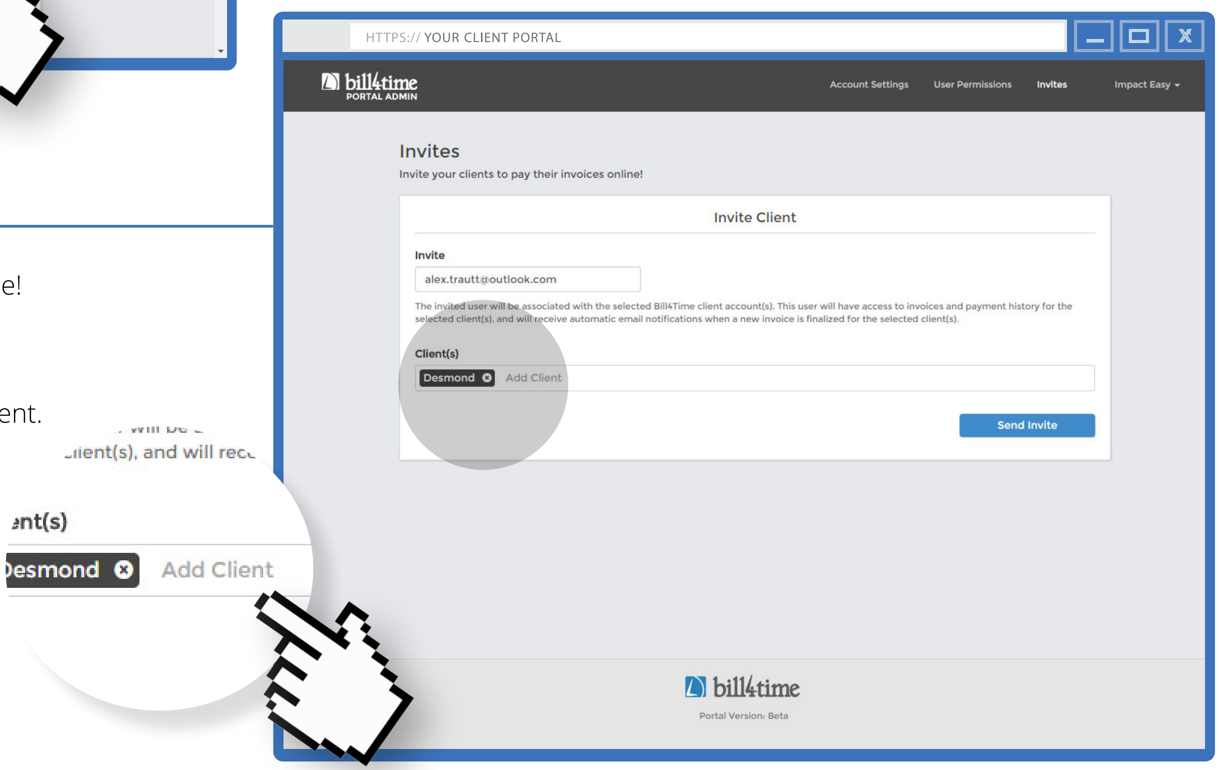
The button hight-lighted in **BLUE** is the current selection.

Invite Your Clients

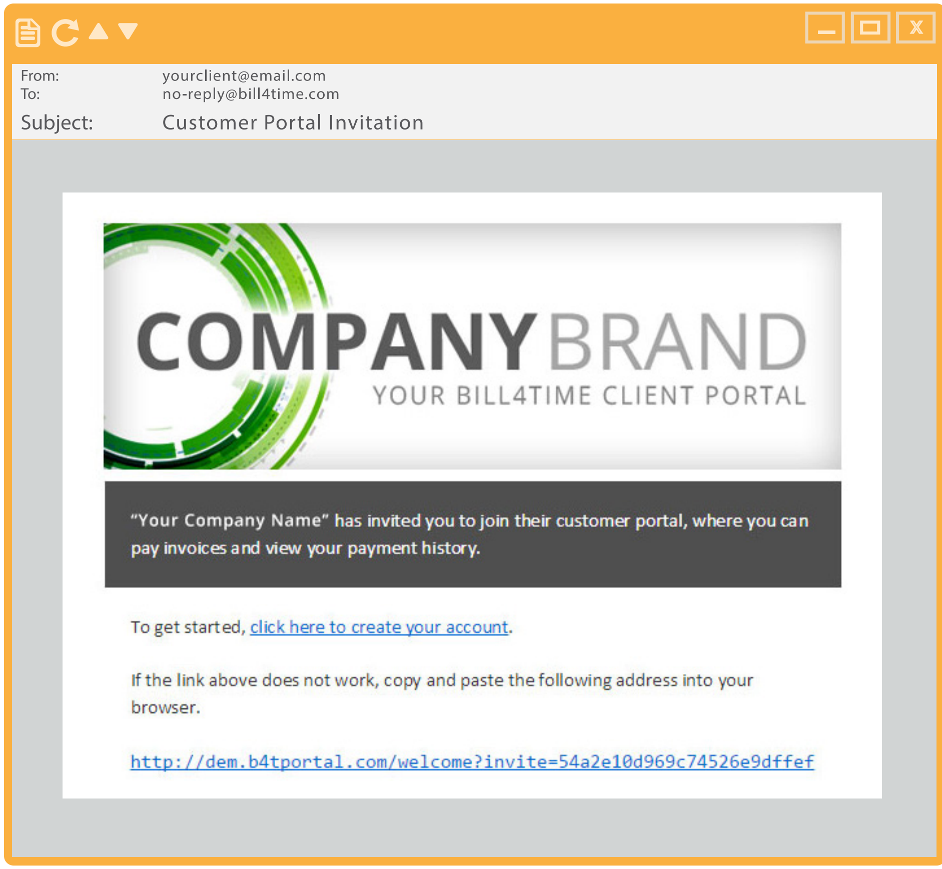
Email, associated a company or client, send and you're done!

SETTING USER PERMISSIONS

Most of your user's will be associated with one business/client. For your clients that have multiple businesses/clients, you can associate all with one user. Just click Add Client.

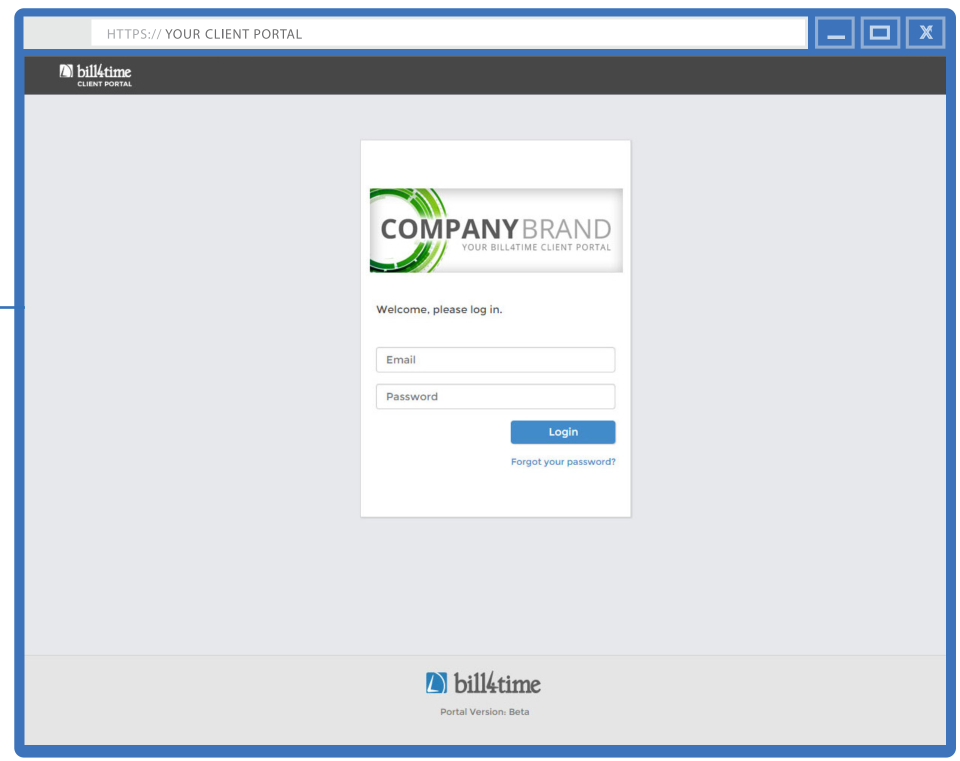


Your Complete Time Billing Solution



Email Invitation

Your client will receive an email with a link to create an account. Be sure to upload your logo, it will be used within your invitations.



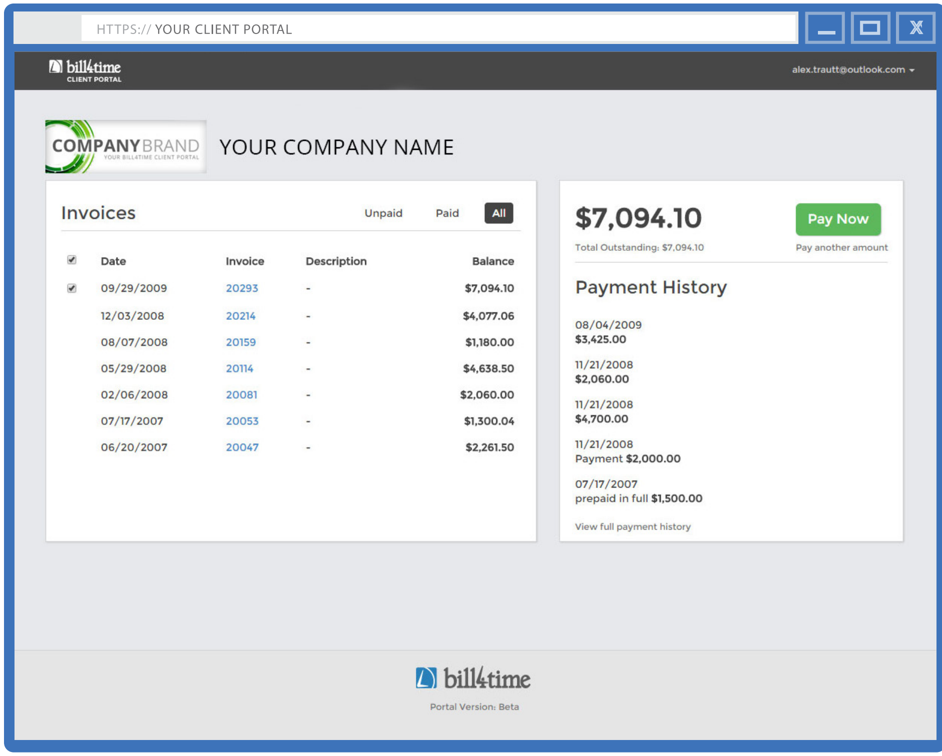
Client Password

With one creative password and a click, your client creates an account and is ready to go!

Invoice Dashboard

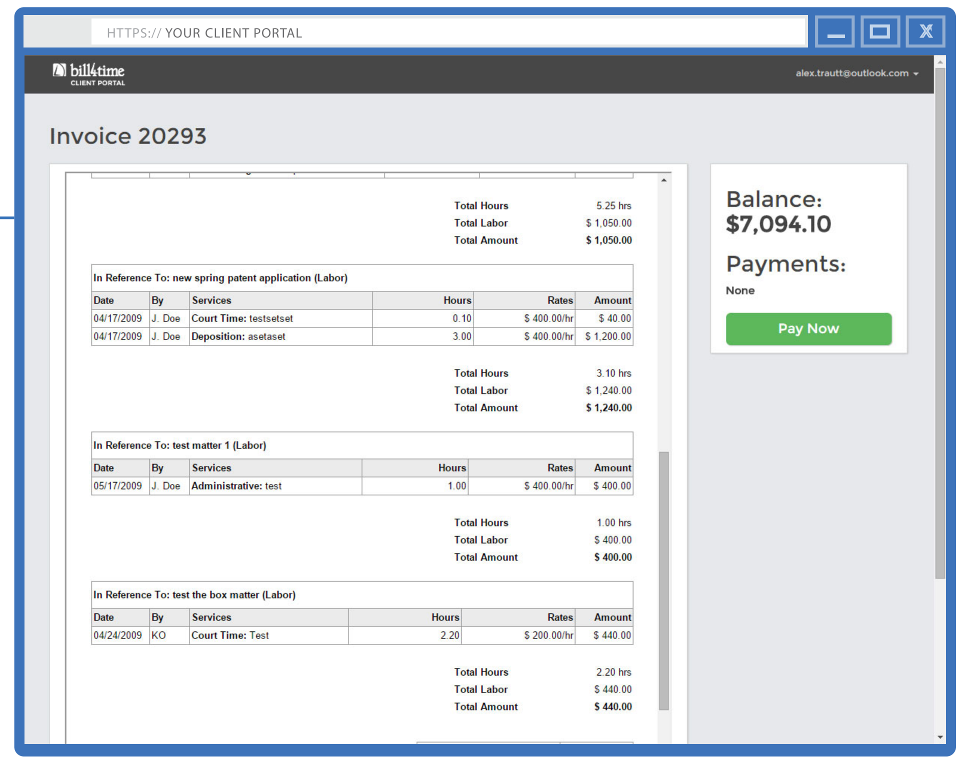
After creating an account or successfully logging in, your client will land on the invoices dashboard.

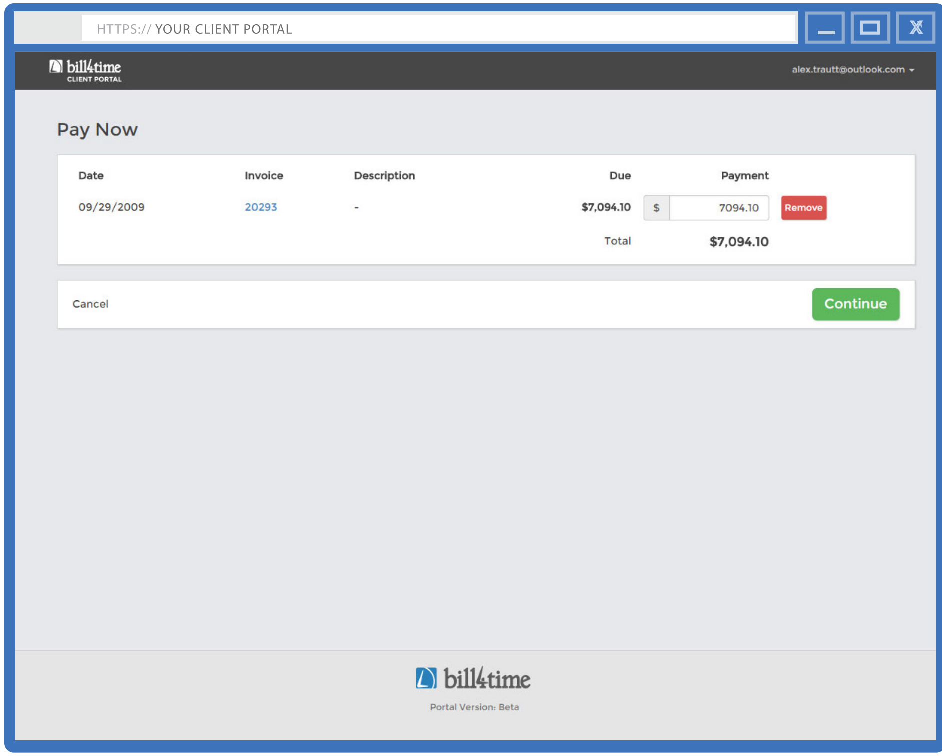
If you have not allowed access to see their history, only unpaid invoices will be shown. By default all unpaid invoices will be selected. For this example we have chosen to show all.



Invoice Preview

By clicking directly on the invoice number, your client can preview each invoice and easily “Pay Now” after review.





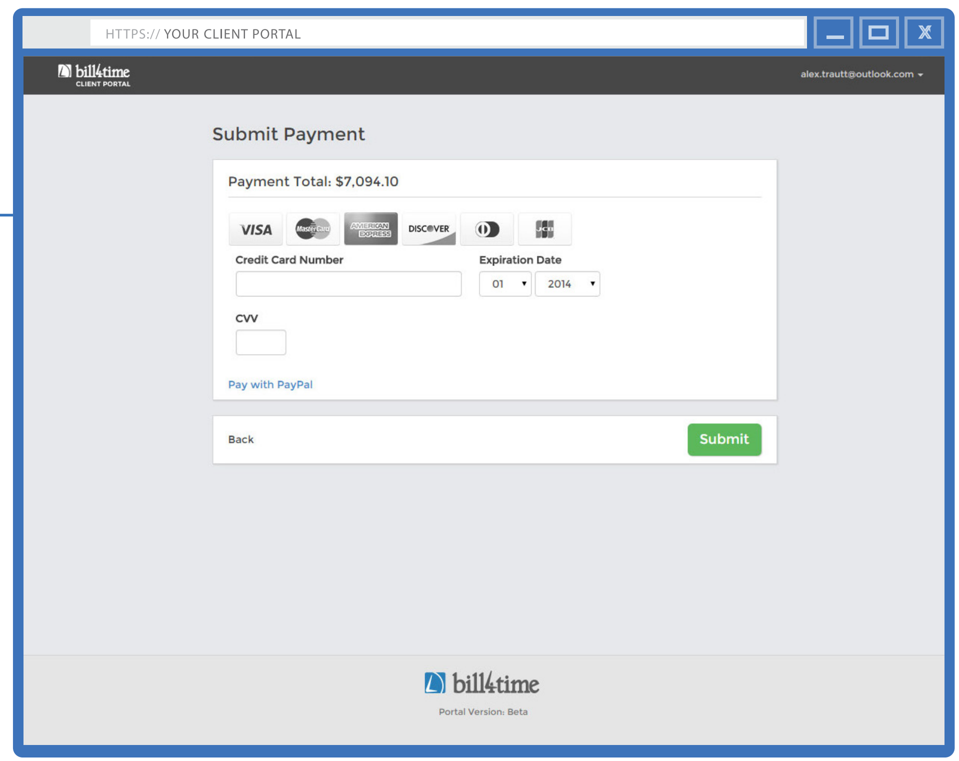
Payment Confirmation

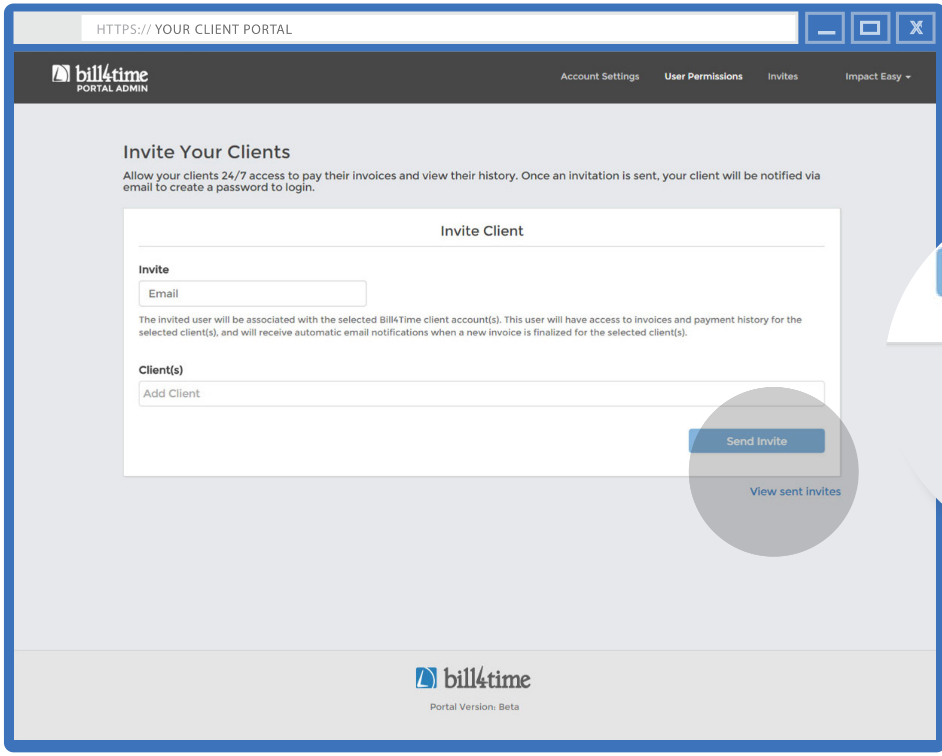
One last review before payment. Your client will see all the invoices they have selected to pay and can also make adjustments to the amount paid on each, if necessary.

Submit Payment

If you provide both Stripe and PayPal payment options, both will be available for your client to select from. If one option (Stripe or PayPal) is provided, that will be the only option displayed.

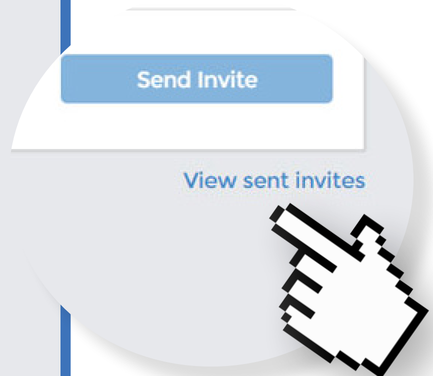
Credit Card Number, Expiration Date and CVV. The payment has been made in 3 simple feilds.





View Sent Invites

Now see the status of your invitations in real-time. Below is a quick breakdown.

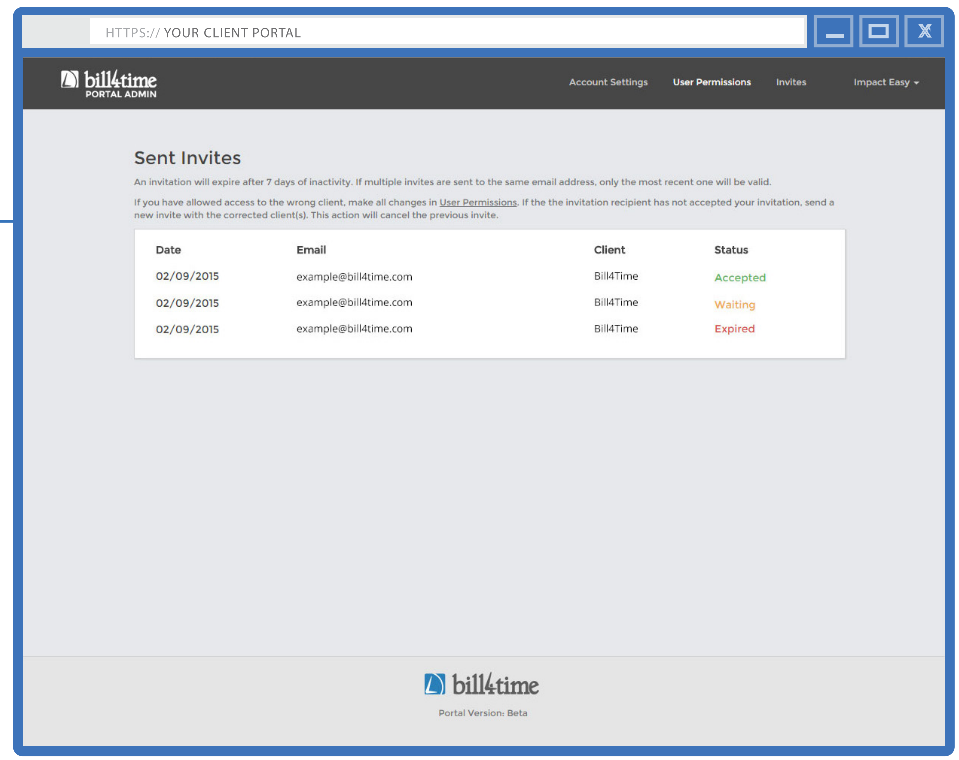


DATE & EMAIL

The date and email address the invitation was sent on and to.

CLIENT

The client(s) associated with the invited user. If you've allowed access to the wrong client, make all changes in User Permissions. If the invitation recipient has not accepted your invitation, send a new invite with the corrected client(s). This action will cancel the previous invite.



Status

ACCEPTED

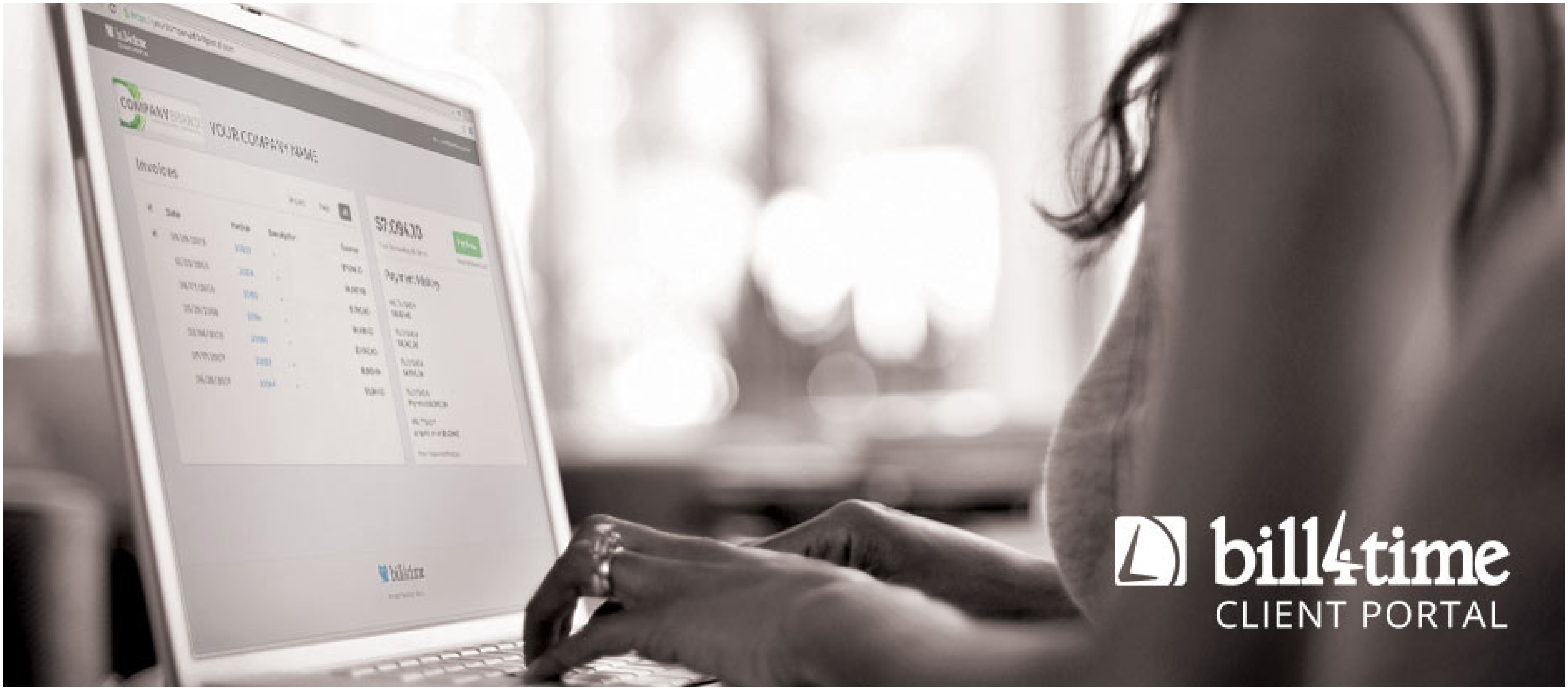
Your client has received your invitation and successfully created an account.

WAITING

Your client has received the email invitation but hasn't clicked through to create an account.

EXPIRED

The invitation either expired due to 7 days of inactivity or if an additional invite was sent to the existing email address.



That's it!

Now that you know your Client Portal inside and out,
start sending those invitations!

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