



Administrative Guide 2018

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Section 1: The Dashboard

Upon logging into Bill4Time you are taken to the dashboard. The dashboard is the central hub for all the functions of Bill4Time. Most features in Bill4Time can be accessed from here. The functions displayed are based on each user and his/her security settings.

The dashboard interface for Bill4Time is shown. At the top, the user 'Jane Smith' is logged in (1). A search bar is available (2). The main navigation bar includes: DASHBOARD (3), CLIENTS (4), MATTERS (5), TIME & EXPENSES (6), SCHEDULING (7), INVOICING (8), REPORTS (9), and ACCOUNTING (10). Below the navigation bar, the current client is 'Smith & Smith, LLC (SANDS)'. There are buttons for 'Add Time' (11), 'Internal Time' (12), and 'Add Expense' (13). A 'Time Entries' section shows a table with columns: Client, Matter, Activity, Notes, and Labor Hours. Below this is a 'Recent Matters' table with columns: ID, Matter, Client, and Last Activity. To the right, there is a 'Today's Time Entries' section and a 'Weekly Billable Amount' line graph showing billable hours over time.

Time Entries 03/16/2018

Client	Matter	Activity	Notes	Labor Hours
Select Client	Select Project	Select Acti	Add Notes	0
+				0

Recent Matters

ID	Matter	Client	Last Activity
+	10768	Divorce	123 - Frank Cole
+	10631	Flat Fee	321 - ABA client
+	10100	Defense	Alexis Kline
+	10775	Non ABA	321 - ABA client
+	10-1540	General	Greg Sherman
+	10066	Investment Planning	Bradley, Richard
+	10514	Divorce	Collins, Pete
+	10075	1015-0013	Anderson, Mary
+	10105	General	Kim Griffin
+	10091	Consulting	Anderson, Tom
+ Add Matter			

Today's Time Entries

Activity	Client	Time
No time entries. Add one?		

Weekly Billable Amount

Graph showing Billable Amount (Y-axis, 0k to 3k) over time (X-axis, 1/21 to 3/11). The graph shows a peak in billable amount around 2/11 and 2/25.

Powered by Bill4Time | Settings | Downloads | Ideas | Support

Figure 1 - The Dashboard

1. **Tools** – At the top, you will have some tools to choose from.
 - a. Click your name at the top to bring down your options to view **My Profile, Users, Settings, Subscription, and Log Out**. If some of these options are unavailable, that means you do not have access to that area of the program.
 - b. Click the plus icon to bring up the option to add a new **Client, Project, Time Entry, Expense, Internal Time, Invoice or Payment**.
 - c. If you are on the Bill4Time Legal plan, you can click the check mark to access the Conflict Checker where you can search for key words or phrases to run conflict checks in your system.

- d. Click the question mark icon to bring up the Help Menu where you can access popular training tutorials, how to contact support, and more.
- e. By clicking the clock icon, you will have access to add new entries via the Multi Timer. This allows you to start/pause timers for different clients and convert them to time entries when finished. This timer is built into the server so if you close your browser, your computer shuts down, or you switch computers, you will have access to these timers no matter where you go.
- 2. Search** – The Search toolbar allows you to search for your Clients and Projects by name.
- 3. Clients** – Access to all client-related functions, such as creating, editing, and searching for clients. You also have access to manage your contacts.
- 4. Projects** – Access to all project-related functions, such as creating, editing, and searching for projects. *Note: While we are referring to “Projects,” you may rename this term to better suit your company, such as Matter, Case, etc. For the purpose of this document, we will continue to use “Project”.*
- 5. Time/Expenses** – Access to time entry/expense screens, and basic time reporting for your activity.
- 6. Scheduling** – For entering and reviewing scheduled events.
- 7. Invoicing** – For creating, viewing, and searching for invoices.
- 8. Reports** – Access to over 40 different reports to pull data such as summary of time billed to AR aging.
- 9. Accounting** – For viewing all client balances, posting payments, and making balance adjustments.
- 10. Add Time** – Add a new time entry.
- 11. Add Internal Time** – If turned on in your Settings, allows you to add non-client, non-billable time for the user signed in.
- 12. Add Expense** – Add a new expense entry.
- 13. The links at the bottom of the Dashboard** – Access to the Settings, Downloads for Mobile/Desktop Widget/QuickBooks Integration, the Ideas Site, and technical support.

The different sections of the Dashboard can be changed for each user who signs into the program. By clicking the gear icon on your Dashboard, you will get a selection of different Dashboard Widgets which you can remove, edit, move around, and add. The gear icon is located at the far right, next to the “Add Expense” button.

After clicking the gear icon, you can choose from the following widgets:

- **Time Entry Grid** – A quick way to enter or review time entries billed on that specific day for the user signed in.
- **Recent Projects** – Gives you quick access to the last 10/25/50/ or All projects that you have worked on. Clicking the “+” symbol to the left of a specific Project will open a new time entry with the Client/Project filled in.
- **Projects by Due Date** – Gives you quick access to projects with specific due dates.
- **Assigned/Subscribed Projects** – Gives you quick access to all projects either assigned or subscribed to you.
- **Budgeted Projects** – Gives you quick access to budgeted projects and their tracked hours.
- **Favorite Reports** – Gives you quick access to your favorite reports you saved in the system.
- **Today’s Time Entries** – Shows you today’s entries that were made by you.
- **Weekly Billable Hours** – Chart to show your billable hours per week.
- **Recent Time Entries** – Shows you the entries that were made by you in the past week.
- **Today’s Schedule** – Shows you your scheduled entries for that particular day.
- **Weekly Billable Amount** – Chart that shows the amount of work you billed per week.

Section 2: System Administration

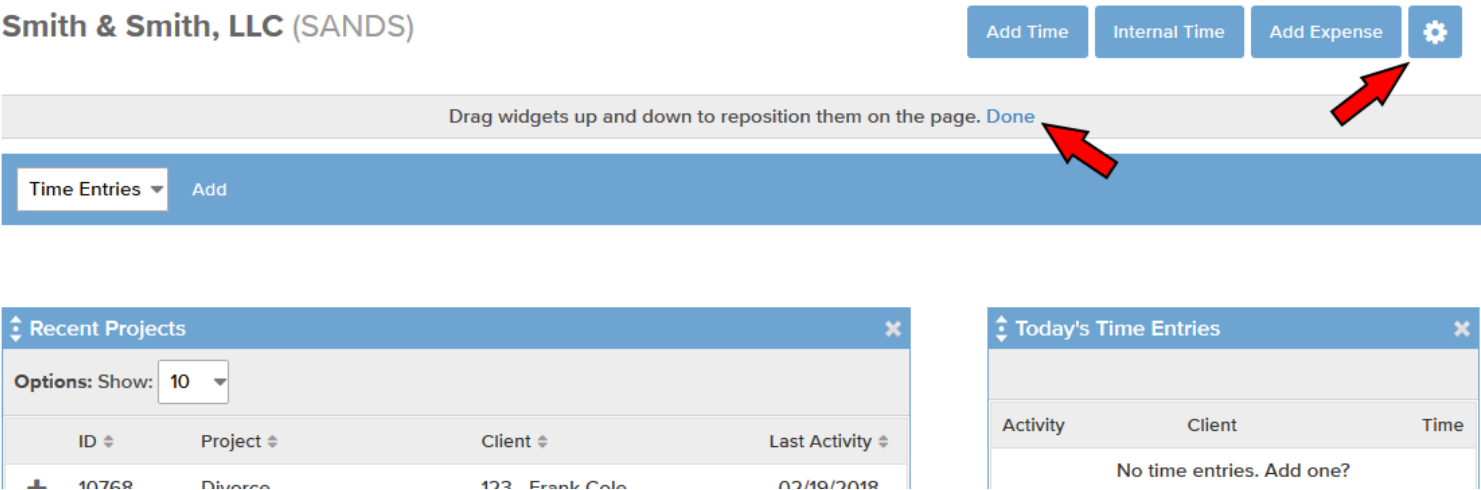


Figure 2 – Dashboard Edit screen

In order to properly use Bill4Time, you must **first set up your Firm/System Settings**, so the program is set up correctly for your company. In the **Administrative** section of the dashboard clicking on *Settings* will take you to the screen below:

General

This is where you will set up the general information for your firm. *As is stated in our privacy policy, no information in Bill4Time will ever be transmitted, shared, or sold to anyone.* Click on the *Edit Settings* button to edit the information on this screen. When you are done with your changes, clicking on *Save Changes* will commit these changes to the system. If you do not want to save the changes made to this screen, simply click on the *Back* button to cancel them.

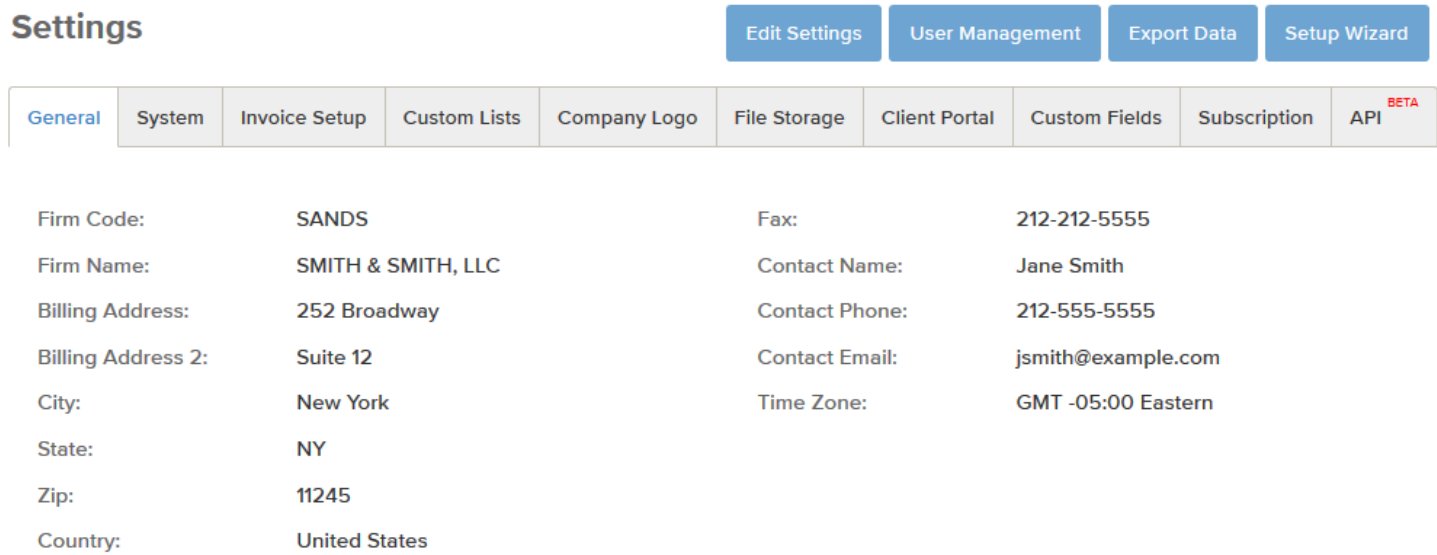


Figure 3: Firm/System Settings main screen

System

This is where you will customize your system settings. To enable/disable a feature, make sure you click *Edit Settings* first. See below for details of each feature used in the System tab.

Settings

Edit Settings
User Management
Export Data
Setup Wizard

General	System	Invoice Setup	Custom Lists	Company Logo	File Storage	Client Portal	Custom Fields	Subscription	API ^{BETA}
---------	--------	---------------	--------------	--------------	--------------	---------------	---------------	--------------	---------------------

☐ Track Client Locations ?
☒ Track Internal (Non-Client) Time ?
☐ Track Project Due Dates
☐ Verify Entries Before Billing ?
☐ Verify Expenses Before Billing ?
☐ Allow "Non-Project Related" Time/Expense Entries ?
☐ Require Activity Type on Time Entries ?
☒ Use Trust Accounting ?
☐ Allow Overtime Billing Rates ?
☒ Sort Projects Alphabetically ?
☐ Enable LEDES File Export ?
☐ Enable ABA Standard Codes ?
☒ Enable Custom Invoice Numbers ?

Accounting Type ? Bill4Time Accounting
Accounting Isolation ? Project
Project Mnemonic ? Project
Labor Mnemonic ? Labor
Activity Mnemonic ? Activity
Tax Mnemonic ? Tax
Tax 2 Mnemonic ? Tax 2
Expense Markup 0.00%
System Date Format mm/dd/yyyy
Week Display Sunday-Saturday
Timer Interval 6 Minutes
Default Currency ? USD (United States Dollar)

Figure 4: Edit System Settings

- **Track Client Locations** –To track your client’s various business locations. With this enabled, you can input various locations and select the appropriate one when creating a project.
- **Track Internal (non-client) Time** – If you want your users to track their non-billable/non-client related time such as lunch breaks, internal meetings, vacations, etc.
- **Track Project Due Dates** – Allows you to track due dates for each project in the system.
- **Verify Entries Before Billing** – If selected, during the process of creating Invoices, the user will be required to verify and approve **each billable time entry** before approving the Invoice. This is for an extra quality assurance check before Invoices are sent. *If this option is not selected, you can still review and make corrections to invoices before finalizing and printing them.*
- **Verify Expenses Before Billing** – This is the same as the *Verify Time Entries Before Billing* option. If not selected, you can still review and edit expenses before billing.
- **Allow “Non-Project Related” Time Entries** – If selected, users will be able to enter billable time that is not part of a client project. Since there is no project assigned to these activities, you will need to create a Client Summary Report to view all of these time entries. When creating a statement for these entries, just choose the name of the client.
- **Require Activity Type on Time Entry** – Makes the *Activity Type* field a required entry on the time entry screen. If you do not wish to require an Activity Type, just uncheck this box.
- **Enable Auto Text Types** – This option allows you to use the Auto Text list. (Found in the Custom Lists tab). This allows the user to replace abbreviations on the time entry screen to their full text equivalents.
- **Use Trust Accounting** – This allows you track payments from a trust account. Useful for lawyers and law firms, but not needed for other professions.
- **Allow Overtime Billing Rates** – Checking this will allow you to bill differently for overtime work, so you can later mark a time entry as *Overtime* and it will be billed accordingly.



If you mouse-over the icon ? a description will pop-up regarding each item.

- **Allow Custom Project IDs** – This allows you to override the standard ID set in the system when you add/edit a project to let you customize your own IDs.
- **Sort Project Drop-Downs Alphabetically** – Checking this will sort your projects in alphabetical order automatically.
- **Enable LEDES File Export** – Used to convert invoices into electronic bills. Used by lawyers and law firms.
- **Enable ABA Standard Codes** – This allows the American Board Association activity/task codes to be required fields for time/expense entries. Used for LEDES exported invoices.
- **Enable Great American File Export** – LEDES file for this specific company if needed.
- **Enable Custom Invoice Numbers** – This allows you to edit invoice numbers.
- **Accounting Type** (drop down selection)
 - **Bill4Time Accounting** – Utilize the Bill4Time internal accounting system to receive payments, track balances/credits, and auto-assign Invoice numbers.
 - **QuickBooks Accounting** – By selecting this option, you can use the *Bill4Time QuickBooks Connect* program to transfer invoice and payment data as well as balance adjustments directly into QuickBooks. For more information please see our support documentation on using *QuickBooks Connect*.
 - **External Accounting** – With this option selected, you will use Bill4Time for everything through the invoicing process, and then use another accounting system or program for handling payments, receivables, balances, etc.
- **Accounting Isolation** (drop down selection)
 - **Client Isolation** – Allows for combined accounting for every project under the client.
 - **Project Isolation** – Allows for separate accounts for each project under the client.

More on the accounting isolation

The Accounting Isolation can be set on the company level under the Settings which will default to all clients in the account. You also have the ability to override this setting per client so the isolation you use the most would want to be setup under the Settings.

Please note that if you make changes either to the whole account or per client, then you will need to go back and edit each payments/adjustment you made that is not applied to any invoices to point them to the right project they belong to or the accounting will not be accurate.

- **Project Mnemonic** – A descriptive word that best captures your company's types of projects. Some examples are: Matter, Case, Ticket, Issue, etc. The changes will be reflected throughout the entire Bill4Time system for your firm, including invoices, reports, and statements.
- **Labor Mnemonic** – A descriptive word that best captures your company's type of service. Some examples are: Labor, Labour, Service, etc.
- **Tax Mnemonic** – A descriptive word that best describes your company's tax type. Some examples are: Tax, GST, VAT, etc.
- **Tax 2 Mnemonic** – A descriptive word that best describes your company's second tax type. Some examples are: Tax, GST, VAT, etc.
- **Expense Markup** – Enter the default markup percentage that will be used when entering expenses. You may override this amount if you wish when you enter each expense.
- **System Date Format** – Choose between either U.S. or European date formats.
- **Week Display** – This will allow you to choose between mm/dd/yyyy or dd/mm/yyyy
- **Time Interval** – Interval for time entries when using the timer. So when you track "0.1" of your time, the timer tracks one time interval.
- **Default Currency** – Choose the currency symbol that you wish work with. You can also change the currency symbol for only a specific client from in the *Client Settings* section.
- **Export Data** – Allows you to backup all data (client, contacts, invoices, accounting activity, project details, user details, etc.) as a hard copy on any computer needed. It is exported as a .csv file, compatible with Excel.

Invoice Setup

Your Invoice Setup allows you to customize your Invoice Template settings for your firm. If you would like more customization on your invoices, Bill4Time does offer customized invoices with the Bill4Time Enterprise plan. For more information please contact Support at support@bill4time.com or 877-245-5484.

Settings

[Edit Settings](#)
[User Management](#)
[Export Data](#)
[Setup Wizard](#)

General	System	Invoice Setup	Custom Lists	Company Logo	File Storage	Client Portal	Custom Fields	Subscription	API <small>BETA</small>
<input type="checkbox"/> Calculate Tax on Labor <input type="checkbox"/> Calculate Tax on Expenses <input type="checkbox"/> Calculate Tax 2 on Labor <input type="checkbox"/> Calculate Tax 2 on Expenses <input checked="" type="checkbox"/> Track Paid/Unpaid Invoice Status			Late Fee: None Type: Grace: 30 Days Period: Auto: On Calculate:						

Default Invoice Template: ?

[New Template](#)

Template Name	Layout	Edit
✓ SANDS template	Professional	
Custom Template for Lisa Jones.	Standard	
Invoice Template for Jill Adler	Professional	
Trust template	Official	

Default Invoice/Statement Header Text: ? (using template header)

Smith & Smith, LLC 252 Broadway Suite 12 New York, NY 11245
--

Default Invoice Note: ?

--

Figure 5: Invoice Setup

- **Calculate Tax on Labor** –To charge sales tax on labor/service
- **Calculate Tax on Expenses** – To charge tax on all expenses
- **Calculate Tax 2 on Labor** – Secondary tax on labor/service
- **Calculate Tax 2 on Expenses** – Secondary tax on expenses

Note: You can apply specific tax rates on certain expenses, too. Find under the “Custom Lists” tab in the Firm/System Settings (page 12), or make the adjustment in the client’s details page (choose the Invoice Presets tab on that page).

- **Track Paid/Unpaid Invoice Status** – This feature lets you apply payments to specific Invoices, thus automatically changing the invoice statuses from unpaid to paid, or vice versa.
- **Late Fee Type** – This feature allows you to set the late fee rates based on either a flat fee or discount. You can set your grace period and have this auto-calculate on past due invoices.
- **Default Invoice Template** – This allows you to create a default invoice template for your clients which can be changed for each client in the *Invoice Presets* tab of the client’s detail page. Click *New Template* to add a new template or click the clipboard icon next to the chosen template to edit it. From there, you will see this screen:

Invoice Template Editor

Delete

Save

Cancel

Content

Cover Letter

Design

Preview

Name:

SANDS template

Header Type:

Text Header ▾

Logo:

Company Default ▾



Company Details:

Show ▾

☒ Company Name☒ Street Address☒ City, State, Zip☐ Country☐ Phone☐ Fax☐ Email☐ Custom Line:

Client Details:

Show ▾

☒ Client Name☒ Attention☒ Street Address☒ City, State Zip☐ Country☐ Phone☐ Email☐ Custom Line:

Smith & Smith, LLC
252 Broadway
Suite 12
New York, NY 11245

Client 12345
Attn: Client Representative
500 Main St
Someplace, NY 10006

Options:

☒ Group By Project☒ Show Services Through Date☒ Show Invoice Terms☒ Show Billable Hours Totals☒ Show Labor Amount☒ Show Expense Amount☒ Show Invoice Amount (Labor + Expenses)☒ Show Previous Balance☒ Show Balance Due☒ Show Payment History☒ Show payment history inline w/ totals☐ Show payment history in a separate section☒ Display 'No Charge' Where Line Total is 0.00

Line Spacing:

Single ▾

Paper Size:

Letter ▾

Columns:

- ☒ Date of Service
- ☒ Services By
- ☐ Task Code (for firms/clients using ABA codes)
- ☒ Activity Type
- ☒ Description
- ☒ Hours
- ☒ Rate
- ☒ Amount
- ☐ Labor Start/End Time

Footer Type: None ▼

Advanced Options:

- ☐ Show Page Numbers
- ☐ Repeat Header (for pdfs)
- ☐ Repeat Footer (for pdfs)
- ☐ Show Project ID on invoices
- ☐ Show Project Description on invoices
- ☐ Show Full Names on invoice line items
- ☐ #10 Windows Envelope (not compatible with Standard/Official designs)

Invoice Add-Ons:

- ☒ Attach Receipts
- ☒ Attach Trust Account Summary
 - ☒ Hide Trust Account Summary with no activity
- ☐ Attach User Hours Summary
 - ☐ Group details by Project
- ☒ Attach A/R Balances Summary

Figure 6: Invoice Template Editor

- **Header Type** – Allows you to customize the header with Text, Custom (picture), or Letterhead options.
 - **Logo** – Allows you to add a logo to your templates.
 - **Company Details** – Turn on/off certain company details to show on the invoice.
 - **Client Details** – Turn on/off certain client details to show on the invoice.
 - **Options** – Turn on/off certain options for your invoices.
 - **Line Spacing** – Single or double line spacing options
 - **Paper Size** – Letter or A4 paper options.
 - **Columns** – Turn on/off certain columns for your invoices
 - **Footer Type** – Allows you to customize the footer with text, an uploaded image, or space for your letterhead office stationary. This setting will show at the bottom of each invoice.
 - **Advanced Options** – Allows for page numbers or repeating of headers/footers for PDF.
 - **Invoice Add-Ons** – Allow you to attach receipts and add Trust or User Hours summary at the bottom of invoices.
- You can then pick the *Design* and *Preview* tab to see what the invoice will look like if you were to create them now. Once finished, click *Save*.

Custom Lists

With Bill4Time you can customize your interface to meet the needs of your firm. Here, you can edit and add items to the drop-down menu choices that will be available to your users on many different Bill4Time screens.

General	System	Invoice Setup	Custom Lists	Company Logo	File Storage	Client Portal	Subscription
Project Types (Edit)		Client Types (Edit)		Billable Activity Types (Edit)			
Bankruptcy		Client Type 1		Consulting \$200.00			
Debt		Company 1		Correspondence			
Defense-Suit		Company 2		Court			
Divorce		Debt		Documentation			
Family Law		LLC		Draft			
Litigation		Personal Injury		Emails \$75.00			
Other		Remediation		Meeting			
Personal Injury				Other			
Real Estate				Paralegal \$150.00			
Suit				Phone Call			
Time & Material				Research			
Expense Types (Edit)		Internal Activity Types (Edit)		Schedule Types (Edit)			
Calls (T) \$6.00		Bereavement		Appointment			
Filing Fee. (T) \$5.00		Break		Court			
Lab Supplies (T)		Business Errand		Dinner Meeting			
Mailing/Postage (T)		Internal Meeting		Holiday			
Meal (T)		Lunch Break		Lunch Meeting			
Mileage (T) \$0.565		Misc		Meeting			
Miscellaneous (T)		Personal Errand		Note			
Printing/Copying (T) \$0.25		Training		Phone Call			
Rent (T)		Vacation		Reminder			
Reports (T)				Task			
Travel/ Lodging (T)				Time Off			
Invoice Term Types (Edit)		Auto Text Types (Edit)		Project Status (Edit)			
Cash		ACM-Attend Council Meeting;		Approval Pending			
Due Upon Receipt - default		doc-Drafting documentation for		Closed			
Net 1		RR-Test and test and test.		Open			
Net 15		RR1-Test test test		Wait(On Client)			
Net 30		TC-Telephone conference with		Waiting (on 3rd party)			
Payment due in 15 days		Tel-Telephone call to					

Figure 7: Custom Lists

Click on *Edit* next to the category type to make changes. An example of editing the *Billable Activity Type* list is in *Figure 8*. To add a new item to the list, enter it in the *New Item* Field, then click the *Add* button. To remove an item, click the “x” icon to the right.

Billable Activity Types

Name: Add

Code:

Rate:

Default: None

Activity Type	Code	<input checked="" type="checkbox"/> Rate <small>?</small>	
Court	<input type="text"/>	\$ <input type="text"/>	✕
testing	<input type="text"/>	\$ <input type="text"/>	✕
Consulting	202	\$ <input type="text"/>	✕
Contract	203	\$ <input type="text"/>	✕
Correspondence	204	\$ <input type="text"/>	✕
Documentation	205	\$ <input type="text"/>	✕
Draft	206	\$ <input type="text"/>	✕

Save
Done

Figure 8: Billable Activity Types

The Auto Text feature makes entering time easier. If you are often writing sentences over and over again than follow these steps to make this process a lot faster:

- Pick your Hot Key symbol. You will use this symbol after typing an abbreviation in order to trigger the text replacement.
- Put in your Abbreviation for the sentence.
- Write in the Full Text that you would like shown below in *Figure 9* is an example for an auto text. The example below shows:
 - Hot Key “!”
 - Abbreviation “ACM”
 - Full Text “Attend Council Meeting;”

When you open a time entry, you put in the abbreviation and hot key. Once you leave the Summary Box it will appear as the Full Text. Example: ACM! = Attend Council Meeting; (or whatever you choose).

For more information please see contact support@bill4time.com or call us at 877-245-5484.

The different types you can edit and change are:

- **Project Types** – To segregate your projects
- **Billable Activity Types** – For time entries
- **Expense Types** – For expense entries.
- **Internal Activity Types** – For internal time
- **Schedule Types** – For scheduled activities
- **Invoice Term Types** – For payment terms
- **Project Status** – Statuses for projects
- **Auto Text Types** –

Auto Text Types

Auto Text List Edit

Hot Key : !

Abbreviation:

Full Text:

Add

Abbr	Full Text	
doc	Drafting documentation for	✕
pc	Phone call to client	✕
TC	Telephone conference with	✕
Tel	Telephone call to	✕

Done

Figure 9: Auto Text Editing

Company Logo

You can add a logo to both your Dashboard and invoice to make the system more personable and customizable. Click the *Edit Settings* button, and then upload your logo for the system and your invoices. The system logo will replace the “Bill4Time” logo located at the top left corner of every page in the system. *If you have any issues uploading your logo please email Support@Bill4Time.com for further assistance.*

Settings

Edit Settings
User Management
Export Data
Setup Wizard


General	System	Invoice Setup	Custom Lists	Company Logo	File Storage	Client Portal	Custom Fields	Subscription	API ^{BETA}
---------	--------	---------------	--------------	--------------	--------------	---------------	---------------	--------------	---------------------

Dashboard Logo:

No image uploaded

size limit: 500 pixels wide, 40 pixels tall.

Invoice Logo:



size limit: 175 pixels wide, 75 pixels tall.

Figure 10: Company Dashboard/Invoice Logo Upload Page

File Storage


Bill4Time can be used as an online document management system as all documents uploaded to the program can be accessed from any computer and any location. We also integrate with Box so any files uploaded to the program will automatically upload to the folder in your Box account. If you upload files in your Box account it will upload them to the appropriate clients in Bill4Time as well.

Settings

SaveBack

General	System	Invoice Setup	Custom Lists	Payment Info	Company Logo	File Storage	Client Portal	Custom Fields	Subscription
---------	--------	---------------	--------------	--------------	--------------	--------------	---------------	---------------	--------------

File Storage Options


☒ Use Bill4Time Storage



☐ Use Box Storage Store files with Box.
Requires a Box Account ([Need one?](#))

Figure 11: File Storage tab

Client Portal

The Client Portal has many benefits not only for your business but also for your clients. When setting up your client portal you can go through certain settings like setting up a payment option for your clients to pay for their invoices online. You can also invite your clients to the portal so they can securely login to view past invoices and payments as well as being automatically notified when emails are ready for them to view.


Settings

Edit Settings
User Management
Export Data
Setup Wizard

General
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Invoice Setup
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Company Logo
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Custom Fields
Subscription
API ^{BETA}

Account Settings
User Permissions
Invites

Upload Your Logo



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

Upload

Payment Setup

Current Settings

You have the following payment options configured:

Stripe ✓ (Stop using Stripe)

PayPal ✓ (Stop using PayPal)

Settings

Send automatic invoice notification emails?

Turn this on to automatically notify your clients by email every time a new invoice is ready to be paid.
Recommended setting: 'Yes'.

Yes
No

Allow ACH Payments

Turn this on to allow invoices to be paid with ACH, avoiding credit card fees.
Important: Users must be invited to the portal in order to pay with ACH.
Recommended setting: 'Yes'.

Yes
No

Invoice email link expiration

Set the duration it takes for an invoice link to expire.
Recommended setting: '60 days'.

60 days

Allow clients to view their account history?

Turn this off to prevent your clients from viewing their full payment history.
Recommended setting: 'Yes'.

Yes
No

Display calculated invoice balances?

This option controls automatic calculation of invoice balances. When 'Yes' is selected, payments will be subtracted from invoice totals, and clients will see their remaining balance left to be paid. When 'No' is selected, clients will only see the invoice amount. Any payments they make will not be subtracted from that amount.
Recommended setting: 'Yes'.

Yes
No

Allow guest access?

This option determines whether or not your clients are required to log in before accessing the client portal. Requiring clients to log in provides a more secure experience. Please note that when you email an individual invoice to a client through Bill4Time, the recipient of that email will always be able to view and pay that invoice, regardless of this setting.
Recommended setting: 'No'.

Yes
No

Figure 12: Client Portal


After creating and finalizing the invoice, you can either click on the Email button on the Invoice Details page or click the envelope icon next to a finalized invoice on your Invoice Management screen.

Type	ID	Description	Invoice Date	Created	Status	Paid	Invoices	Total	
Invoice	21558	Single invoice for Andy Halloway - Real Estate (10116)	06/29/2016	06/29/2016	Finalized		1	\$906.25	✉
Invoice	21557	Single invoice for ABA client	06/29/2016	06/29/2016	Finalized		1	\$794.00	✉
Invoice	21556	Single invoice for Greg Sherman	06/23/2016	06/23/2016	Finalized		1	\$437.50	✉
Batch	1657	Multiple invoice batch	06/17/2016	06/17/2016	Pre-Bill		6	\$21,029.84	+
Invoice	21545	Single invoice for Edlund, Elsie - General (10047)	06/03/2016	06/03/2016	Pre-Bill		1	\$243.75	
Invoice	21544	Single invoice for Donna J. Moss - Custody (10039)	06/03/2016	06/03/2016	Finalized		1	\$900.00	✉
Invoice	21543	Single invoice for Davis, Kira - General (10078)	06/03/2016	06/03/2016	Finalized		1	\$2,081.25	✉
Invoice	21542	Single invoice for David Shore - David vs. Matt (10034)	06/03/2016	06/03/2016	Finalized		1	\$2,843.75	✉
Batch	1651	Closing Account.	06/03/2016	06/03/2016	Pre-Bill		4	\$5,962.50	+
Invoice	21527	Single invoice for Garza, Karen - Karen vs. Tim (10060)	05/23/2016	05/23/2016	Finalized	✓	1	\$0.00	✉

Figure 12a: Emailing Invoice

Once the client clicks on the link, it will open their invoice for them to view online (Figure 12b). Here, the client can see a digital copy of the invoice. At the top right corner, there will be an Invoice Total and Account Balance. They will also be able to view full account history to view past invoices and payments in their account. They can print the invoice as well as save it as a PDF and of course pay for the invoice if you are linked up with either Stripe, PayPal, LawPay, or other payment options.

Invoice 21556



Smith & Smith, LLC
252 Broadway
Suite 12
New York, NY 11245
212-555-5555

Greg Sherman
222 22nd St
8th Floor
New York, NY 10018

Invoice 21556

Date	Jun 23, 2016
Terms	Due Upon Receipt
Service Thru	Jun 23, 2016

In Reference To: General (Labor)

Date	By	Services	Labor Hours	Billable Hours	Rates	Amount
06/23/2016	JS	Meeting: Meeting with client.	2.50	2.50	\$ 175.00/hr	\$ 437.50
Total Hours						2.50 hrs
Total Labor						\$ 437.50
Total Invoice Amount						\$ 437.50
Previous Balance						\$ 0.00
Balance (Amount Due)						\$ 437.50

Trust Account Summary

Billing Period: 06/21/2016 - 06/23/2016

Client: Greg Sherman | General Project Trust

Total Deposits	Total Disbursements	Current Balance
\$5,000.00	\$0.00	\$5,000.00

Date	Transaction	Deposit	Disbursement	Balance
06/21/2016	Received From-Greg Sherman	\$5,000.00		\$5,000.00

Pay Now

Invoice Total:
\$437.50

Account Balance:
\$437.50

[View full account history](#)

Figure 12b: Client Portal Invoice Preview

Subscription

This is where you can see your firm's billing history (bills your firm incurs each month for the use of the Bill4Time service). From here, you can view your billing history for all past charges as well as update your credit card at any point.

To change the credit card on file, do the following:

- Click the *Update Payment Method* button.
- Enter the new credit card information.
- Click *Save* and the system will automatically verify and save the card information for future bills.

You will be able to view the current plan you are on as well as Upgrade your plan if needed.

[Click here for more information on pricing/plans.](#)

Section 3: Users

Now that you have completed the System Set Up, you are ready to start setting up your users. Users are individuals who are billing time and need access to Bill4Time. All individuals accessing Bill4Time must each have a User Account set up.

To get to your User Management you can click your name at the top right and select Users or if you are under the Settings you will have access to the Manage Users button to the right. From here, you will see your list of Active Users for the firm. You can still view all users setup in the account including disabled users by changing the Show at the bottom left (*Figure 13*) from Active Users to All or Disabled users.

A little bit about Users

A user account is required for each individual who will access Bill4Time from your firm. Non-timekeepers (for data entry, billing, etc) who require Bill4Time access also need user accounts. Your users do not have to be in the same physical location since Bill4Time is accessible anywhere. An Active user account is one which can login to the system and is billed for each month as part of your firms Bill4Time subscription. When a user leaves, deactivate their account by changing their status to Disabled. This will prevent them from logging into the system and you will no longer be billed for that user account.

Users

[Add User](#)

User ID ↕	First Name ↕	Last Name ↕	User Type ↕	Office Phone ↕	Mobile Phone ↕	Status ↕
10	Tracy	Finn	Limited User			Active
14	Kimberly	Bond	Office Admin			Active
3	George	Fitzgerald	Office Admin	854-569-5555		Active
6	Kristin	ONeill	Standard User			Active
1	Jane	Smith	System Admin	725-555-8455	555-555-5555	Active

Show: Active Users ▼

Figure 13: Active User List

Setting up a new User

To add a new user to your account, click the New User button. From here, you will see some required fields (highlighted in blue) to fill in for this user. You will be setting up this user with their Login & Password which you will want to send to them in order to sign in. Once they sign into their account, they can edit their profile to change this if needed.

New User

Save

Cancel

User Information

HR Information

First Name:	<input type="text"/>	Address 1:	<input type="text"/>
Middle Initial:	<input type="text"/>	Address 2:	<input type="text"/>
Last Name:	<input type="text"/>	City:	<input type="text"/>
Initials:	<input type="text"/>	State:	[Choose One] ▼
Email:	<input type="text"/>	Zip:	<input type="text"/>
Office Phone:	<input type="text"/>	Country:	United States ▼
Mobile Phone:	<input type="text"/>	Time Zone:	Using Firm Default ▼ ⓘ
Home Phone:	<input type="text"/>	Std. Hourly Rate:	<input type="text"/>
Login:	<input type="text"/>	Status:	Active ▼
Password:	<input type="text"/>	Contractor:	No ▼
User Type:	[Select User Type] ▼		

Figure 14: New User Setup

The required fields have light blue text boxes:

- **First name**
- **Last name**
- **Email** – This can be used when emailing invoices.
- **Login** – The user will need this to access the system. It is not case sensitive.
- **Password** – The user will need this to access the system. It is not case sensitive.
- **User Type** – The accessibility of the functions and information stored in the software. This will determine which options appear on the user's dashboard as well as be a template for their User Permissions (Figure 15)
- **Std. Hourly Rate** – The defaulted user rate. You can over-ride this rate in the client details, project details, activity type, and time entry.



If the user forgot the Company ID, Username, or Password, they can send a password reset as long as their correct email is setup in their account. If not, the Admin will need to go in and reset this information for them for security purposes.

Notable optional fields:

- **Initials** – This will be used on the invoice, noting the user's contribution to the work and expense entries. You can put up to 20 characters with spaces. If there is nothing in this text field, it will default to the first letter of the first and last name.
- **Contractor** – This feature allows you to have temporary users to your Bill4Time account. Here, you put in the rate that they are charging you. The Std. Hourly Rate is the rate that will be on the invoice for your clients to pay you.
- **Status** – This is where you would activate or deactivate the user. This will affect your monthly subscription.

Click the *HR Information* tab if desired which is just for internal purposes, and when finished, click Save. *Note that each active user account is billed accordingly in your monthly service fee.*

Editing a User Account

The user account is now created, and you can view or edit the information for a User at any time. Once the user is setup in the system you can go through the options available like User Permissions.

User Permissions

Configure what part of the system you would like the user to access. To enable/disable a permission, check the boxes next to the specific permissions.

User Information

HR Information

Email Alerts

User Permissions

Client Access

Login History

Set User Default:

Save Changes

System Administration	
<input checked="" type="checkbox"/>	Users
<input checked="" type="checkbox"/>	Clients
<input checked="" type="checkbox"/>	View Clients
<input checked="" type="checkbox"/>	Create/Edit Client
<input checked="" type="checkbox"/>	Firm Settings
Rates	
<input checked="" type="checkbox"/>	View Billing Rates
<input checked="" type="checkbox"/>	Edit/Define Billing Rates
Accounting	
<input checked="" type="checkbox"/>	View Balances
<input checked="" type="checkbox"/>	Receive Payments
Invoicing	
<input checked="" type="checkbox"/>	Invoicing
<input checked="" type="checkbox"/>	View Invoices
<input checked="" type="checkbox"/>	Resend Invoices/Balance Statements
Projects	

Figure 15: A Selection of the User Permissions screen

System Administration

These permissions should only be given to the office/firm administrator or owner

- **Users**– The user can view the complete list of users, set up new and delete users, change user permissions, and view/edit passwords.
- **Clients** – Access to Client Management
 - **View Clients** – The user can view client’s information
 - **Create/Edit clients** – The user can create new clients or edit information on existing clients.
- **Firm Settings** – ability to edit settings for the firm such as preferences, address, credit card, etc.

Rates

- **View Billing Rates** – The user can see all the billing rates and all total billed amounts pertaining to these rates.
- **Edit/Define Billing Rates** – The user can edit billing rates for clients, employees, or projects.

Accounting

- **View Balances** – The user can see the client balances of all clients.
- **Receive Payments** – The user can receive payments towards clients and projects.

Invoicing

- **Invoicing** – The user can create, edit, and delete invoices.
- **View Invoices** – The user can see all clients' invoices.
- **Resend Invoices/Balance Statements** – The user can reprint Invoices and balance statements.

Projects

- **Create/Edit/Close Projects** – The user can create a new project, edit an existing project, and close a completed project.
- **Access Projects** – The user can view projects.
 - **All Projects** – The user can view all projects.
 - **All Open Projects** – The user can view only open projects.
 - **Limited Project Access** – The user can only see their personal data entered on projects.
- **Allow projects assigned to this user** – The user can be an account manager for assigned projects
- **View Billable Hours** – The user can see the billable hours.

Time/Expense Entries

- **View other user's time/expenses** – This user can view other users time/expenses.
 - **Enter time/expenses for other users** – This user can enter billable time and expense entries for other users.
- **Enter Expenses** – The user can enter his/her expenses that will be billed to clients.
- **Can Override Billing Rates on Time Entries** – The user can view and override his/her billable rates and other Users billing rates on time entries. This feature is not automatically enabled and must be checked off to be able to view this option.
- **Allow Entries to be Excluded from Invoices** – This allows the user to be able to exclude their entries from being invoiced.
- **Limit time/expense and internal time entries to the current week** – This user will only be allowed to add time to the current week and not outside of it.
- **Limit time/expense and internal time entries to the current month** – This user will only be allowed to add time to the current month and not outside of it.

Scheduling

- **View Other Users Schedules** – The user can see another user's calendar or the *All Users* calendar.
- **Manage Other Users Schedules** – The user can add new or edit existing entries to another user's calendar.

Reporting

- **Full Reporting Access** – The user can run reports with data for the entire firm.
- **Limited Reporting Access** – The user will only be able to run reports for their own time/expenses.

Account Manager Settings

- **View time/expense entries** – If checked, this allows the user to view entries created by any users under the clients they manage.
- **Edit time/expense entries** – If checked, this allows the user to view/edit entries created by any users under the clients they manage.
- **View Billable Rates** – If checked, this allows the user to view rates on entries created by any users under the clients they manage.
- **Edit Billable Rates** – If checked, this allows the user to edit rates on entries created by any user under the clients they manage.
- **View Balances** – If checked, this allows the user to view balances on entries created by any users under the clients they manage.

Once you are finished editing user permissions, click the *Save Changes* button.

Client Access

From this screen you can select which clients the user has access to. If you revoke client access for a user, that means they will no longer be able to view or add time/expenses to that client/matter. System Administrators automatically have access to all clients.

Jane Smith

Delete User

Back

User Information

HR Information

Email Alerts

User Permissions

Client Access

Login History

☒ Full Access☐ Limited Access

Save Changes

[Check All](#) | [Clear All](#)

Enable	Client Name
<input checked="" type="checkbox"/>	123 - Frank Cole
<input checked="" type="checkbox"/>	ABA client
<input checked="" type="checkbox"/>	Abigail Barnes
<input checked="" type="checkbox"/>	Alexis Kline
<input checked="" type="checkbox"/>	All State Insurance Company
<input checked="" type="checkbox"/>	Allison Moore
<input checked="" type="checkbox"/>	Anderson, Tom
<input checked="" type="checkbox"/>	Andy Halloway
<input checked="" type="checkbox"/>	Anne Hall
<input checked="" type="checkbox"/>	Arnold Tracy
<input checked="" type="checkbox"/>	Bassler, Ruby
<input checked="" type="checkbox"/>	Berk, Amanda
<input checked="" type="checkbox"/>	Bill Jones

Figure 16: Client Access Settings

Select the check box next to *Full Access* to give this user access to all clients (default). If you select *Limited Access* you can then select which clients the user can access. *Check All* will enable all clients, *Clear All* will disable all. You can also go through and eliminate access on a per client level from the Client itself. Once you are finished making the necessary changes, click Save Changes.

Section 4: Clients

Once you've set up your firm and users' settings, it's time to start entering clients. Click the *Clients* tab and you will be taken to the Client Management screen (Figure 17). If you have not created any clients yet, this screen will not display any clients.

Clients

Add Client

Manage Contacts



Show Filters



Id	Name	Type	City	State	Zip	Account Mgr.	Billed Balance
34A	123 - Frank Cole		Brooklyn	NY	11220	Jane Smith	\$5,212.52
277	321 - ABA client					Tracy Finn	\$3.40
68	Alexis Kline					Mary Formanski	\$0.00
127	All State Insurance Company		New York	NY	10256	Jane Smith	\$752.00
26	Allison Moore	Company 2	Wall	NJ	08774	Mary Formanski	\$187.50
50	Anderson, Mary					Mary Formanski	\$0.00
61	Anderson, Tom		New York	NY	20012	Mary Formanski	\$0.00
76A	Andy Halloway		Pleasantville	PA	20115	Mary Formanski	\$1,787.50
78	Arnold Tracy		Riverside	CA	92507	Mary Formanski	\$0.00
23	Banks, Kyle		New York	NY	20012	Jane Smith	\$0.00

Page Size:10

Prev

1

2

3

4

5

...

9

Next

Figure 17: Client Management Screen

Creating a Client

From the Client Management screen, click the *Add Client* button to be taken to the screen below:

New Client

Save

Cancel

General Information

Client ID: Billing Name: Client Name: Address 1: Account Manager: Address 2: Email: Address 3: Phone: Country: Mobile: City: Fax: State: Creation Date: Zip:

Client Settings

Status: Currency Code: Client Type: Currency Symbol: VAT Number: Accounting Isolation: 

Figure 18: New Client Screen

The only required field (as denoted with the light blue text box) is the Client Name. The notable optional fields are as follows:

- **Client ID** – If not filled in, a numerical ID will automatically assign itself to the client.
- **Client Name** – Here you can enter the clients name on how you wish to organize your client in the system. So for example, if you would like to order your clients by last name, first name you would enter that here.
- **Account Manager** - The user who is the primary manager for this client
- **Email** – This is the primary email used to email your invoice through the Bill4Time portal
- **Phone; Mobile; Fax; and Billing Address** – This information can be pulled on your invoices dependent on your invoice template settings.
- **Billing Name** – The Billing name is what will show on your client invoices. This is specific if you organize your clients in Client Name by last name, first name but on the invoice you would like it to show first name last name.
- **Creation Date** – If no date is selected, it defaults to the date that the client was inputted into Bill4Time.
- **Client Settings**
 - **Status** – A new client is automatically set up as *Active*. Change this to *Disabled* when you are ready to close the client.
 - **Client Type** – Here you can segregate your clients any way you want to make client management easier. You can click the plus icon to view and edit your client types which can be useful on reports.
 - **VAT Number** – can be filled in if available.
 - **ABA Codes** – Turn this on or off, depending on the ABA code setting in the Firm/System settings. This enables you to custom the ABA code setting for each client.
 - **Currency Code & Symbol** – Change the standard currency symbol per client if needed.
 - **Accounting Isolation**
 - **Firm Default** – The account isolation that is chosen in the Firm/System settings.
 - **Client** - Allows combined accounting for every project under the client. The accounting under each project is the sum of all projects under this one client.
 - **Project** - Allows separate accounts for each project under the client. The accounting under each project is separate from the accounting activity of the other projects for this one client.

When you are finished click the *Save* button to commit the client to the system, and you will be taken to the *Client Details* screen.

If you followed the steps above a new client has then been created. From here, you can create projects, time entries and expense entries for the client, but you may want to go through the Edit Client process to ensure that custom settings for this client are correct.

Client Details

Once you save or view a client you will be on the Details page. The Details page will show you the information on the client which you can edit at any point. You can also view the current open projects to click into as well as add new projects from this page.

At the top you can quickly add Time & Expenses from this screen. You can also click Create Invoice to be brought to your invoice management as a quick short cut. The Client Budget allows you to create a budget per client/project with the amount of money budgeted per month.

Greg Sherman

Add Time
Add Expense
Create Invoice
Client Budget
Edit
Disable

Details	Invoice Presets	Billing Rates	User Access	Contacts	Notes & Files	Notifications	Accounting	Trust Account
---------	-----------------	---------------	-------------	----------	---------------	---------------	------------	---------------

Client ID: 339
Account Manager: Paul Michaels
Primary Contact:
Email: gsherman@example.com
Phone: 555-555-8989
Mobile:
Fax:
Creation Date: 09/26/2016

Billing Contact:
Billing Name: Greg Sherman
Address: 210 22nd St
18th Floor
Country: United States
City: New York
State: NY
Zip: 10001

Client Settings

Status: Active
Client Type: Real Estate
VAT Number: N/A

Accounting Isolation: Project
Currency Code: Firm Default
Currency Symbol: Firm Default (\$)

Accounting Summary

Project	Last Payment Date	Last Payment	Balance	Balance w/ Unbilled
Client Totals	10/07/2017	\$4,226.88	\$0.00	\$13,220.50
Contingency	05/10/2017	\$4995.00	\$0.00	\$0.00
Flat Fee Services	06/30/2017	\$5007.67	\$0.00	\$5,000.00
General	10/07/2017	\$4226.88	\$0.00	\$8,220.50

Current Open Projects [\[Add New Project\]](#)

ID	Project	Assigned To	Date
10664	Contingency	Jane Smith	09/26/2016
10665	Flat Fee Services	Jane Smith	09/26/2016
10-1540	General	Jane Smith	09/26/2016

Figure 19: Client Details tab

Invoice Presets

Here you will be able to set up different Invoice options that will only apply to this client. This is useful if your client has specific requirements for their template or different header, late fee, or tax preferences.

Making any changes to your clients Invoice Presets will only affect this client and the projects underneath. You can change these presets on a per project level as well.

Greg Sherman

Add Time

Add Expense

Create Invoice

Client Budget

Edit

Disable

Details	Invoice Presets	Billing Rates	User Access	Contacts	Notes & Files	Notifications	Accounting	Trust Account
Payment Terms:	Due Upon Receipt			Labor Tax:		0.0000% (default)		
Invoice Attn:	Attn: Leslie N McDonald			Expense Tax:		0.0000% (default)		
Invoice Discount:	0.0000%			Labor Tax 2:		0.0000% (default)		
				Expense Tax 2:		0.0000% (default)		
Late Fee Type:	None							
Grace Period:	30 Days							
Auto Calculate:	On							

Invoice Templates: ?

New Template

✓ Template Name	Design	Edit
✓ Firm Default (SANDS template)	Classic	
Custom Template for Lisa Jones.	Standard	
Invoice Template for Jill Adler	Professional	
SANDS template	Classic	
Trust template	Official	

Default Invoice/Statement Header Text: ? (using template header)

Smith & Smith, LLC 252 Broadway Suite 12 New York, NY 11245
--

Default Invoice Note: ?

--

Figure 20: Invoice Presets Screen

The notable fields are the following:

- **Payment Terms** – These will be displayed on your invoice if it is enabled in the invoice template.
- **Invoice ATTN:** This is the name that will accompany the client's address in the invoice. These will be displayed on your invoice if it is enabled in the invoice template.
- **Tax Rates** – This allows you to edit the tax rates setup on your client to override your default setup in the Settings.
- **Late Fees** – This allows you to edit the Late Fees setup on your client to override your default setup in your Settings.
- **Invoice Template** – This allows you to change the template you need by clicking on the template you wish the client to use. The check mark denotes which template is currently used for the client. To switch to a different template, click the desired template. To create a new template, click the *New Template* button.

- **Invoice Header Text** – This pulls from your Settings and can be overrode to change the header that will appear on the invoice.
- **Invoice Note Text:** This pulls from your Settings and can be overrode to change the note that will appear on the invoice.

Billing Rates

Here, you will set up any custom billing rates for this client. The two options are:

1. **Flat Rate (All Users)** – Selecting this option will have the client billed at the same hourly rate for all users' hourly work. It overrides all hourly rates set per user in the *User Setup*. When selecting this you will be prompted to enter the flat rate amount.
2. **Per User** –All employees bill at their standard rates (as defined in the *User Details* page) and you can override those rates from this screen on a per-user basis. These changes will only affect the client you are editing.



This client-level rate overrides the user's Standard Hourly Rate stated in the User Details page. What can override the rate from the client level? The rates at the project, activity, and time entry level.

The user's default rates will be listed to the right. If you wish to override the default rate, select the user which will activate the override rate field. Enter in the hourly rate for this user, specific to this client.

If you are working with any Contractors, you can click Show Contractor Rates to view the contractor rates setup in their user profile and to override them as well.

When you are done, click on the *Save Billing Rates* button.

Note on Billing: The billing rates here apply for **this client only** but can still be overridden on a per-project basis. When creating a project, you will have the option to set a custom billing rate (hourly) or set the project as flat-fee billing. More information, consult Bill4Time's supplemental guide: *The User Guide* and look under **Creating Projects**.

Greg Sherman

Add Time

Add Expense

Create Invoice

Client Budget

Edit

Disable

Details

Invoice Presets

Billing Rates

User Access

Contacts

Notes & Files

Notifications

Accounting

Trust Account

Billing Rates

Contractor Rates

Save

☐ For All Users

☒ Per User

Standard		
User	Default Hourly Rate	Override Hourly Rate
George Fitzgerald	\$200.00	<input type="checkbox"/> <input type="text"/>
Jane Smith	\$250.00	<input checked="" type="checkbox"/> <input type="text" value="\$225.00"/>
Kimberly Bond	\$200.00	<input type="checkbox"/> <input type="text"/>
Tracy Finn	\$75.00	<input type="checkbox"/> <input type="text"/>

Figure 21: Billing Rates Screen

User Access

From this tab you can select which users have access to this client. If you set a user to not have access to a client, they will not be able to create projects for the client, view any projects that are open for the client, or do any billable work for the client. Essentially, they will not know that the client exists.

Please Note – If you already removed user access from the Client Access tab under the user profile, they will not have access to the client even though they are checked in the User Access tab on the Client profile.

Selecting the *User Access* tab will take you to this screen:

Greg Sherman

Add Time

Add Expense

Create Invoice

Client Budget

Edit

Disable

Details

Invoice Presets

Billing Rates

User Access

Contacts

Notes & Files

Notifications

Accounting

Trust Account

Save

Enable	User Name
<input type="checkbox"/>	Automatically Add All Current and Future Users
<input type="checkbox"/>	George Fitzgerald
<input checked="" type="checkbox"/>	Jane Smith (System Admin)
<input type="checkbox"/>	Kimberly Bond
<input checked="" type="checkbox"/>	Kristin O'Neill
<input checked="" type="checkbox"/>	Tracy Finn

Figure 22: User Access (per-client view)

By default, each client is set up to be accessible by all users, indicated by a check mark next to “Automatically Add all Current and Future Users” and their names. This enables all the current users in your firm - as well as any users added in the future - access to this client.

If you want to choose the users that can have access to this client, uncheck the “Automatically Add...” box and place a check mark next to any users that you want to enable client access. You will not be able to remove client access from System Administrators. Click the *Save Changes* button to commit these changes to the system.

Contacts Tab

You can create contact records for key personnel at the client level. This information is important because it can be looked up by anyone in the firm as well as being displayed alongside relevant projects.

Select the *Contacts* tab to be taken to this screen:

Greg Sherman

Add Time

Add Expense

Create Invoice

Client Budget

Edit

Disable

Details	Invoice Presets	Billing Rates	User Access	Contacts	Notes & Files	Notifications	Accounting	Trust Account
---------	-----------------	---------------	-------------	----------	---------------	---------------	------------	---------------

Add Contact

Contact Name	Projects	Title	Department	Email	Phone	
Joe Morge	1			joe@example.com		[Remove]
Leslie N McDonald	0	Job Title	Department	leslie@yahoo.com	555-333-2454	[Remove]

Sort By: First Name ▾

Figure 23: View Client Contacts

To add a new contact, click on the *Add Contact* button. *First Name* and *Last Name* are the only fields required. Click on *Additional Information* to enter more information (eg: address, department, etc.) into the contacts account as well. Click *Save* to commit this contact to the system.

Notes/Files

From this section you can add notes or file attachments that are important for your servicing the client but not relevant to one particular project. You can upload just about any type of file attachment (up to 50 MB) or just enter text information. This data is available to all users that have access to the client and is not part of any client projects. Select the *Notes/Files* tab to be taken to this screen:

Greg Sherman

Add Time

Add Expense

Create Invoice

Client Budget

Edit

Disable

Details	Invoice Presets	Billing Rates	User Access	Contacts	Notes & Files	Notifications	Accounting	Trust Account
---------	-----------------	---------------	-------------	----------	---------------	---------------	------------	---------------

Add File

Add Note


◆ Name & Description ◆	Last Modified By ◆	Upload Date ◆	Delete ◆
 accountactivity.png Activity report for review.	Jane Smith	02/27/2018	✕
 actactivity1.pdf Activity2	Jane Smith	02/27/2018	✕

Figure 24: Client Notes/Files

To add a File Attachment, click on the *Add File* button. You can then browser your computer to select the file you wish to add. Put in a description in the required *Comment* section and click the *Save* button.

To add a new note, click on the *Add Note* button. Enter in your *Subject* and *Note* text (both required). Then click the *Save* button to attach this note to your client's portfolio.

You may edit or delete any Note/File attachments at any time from the main screen. Any previously entered notes and files will be listed.

Accounting Tab

This tab will show you a snapshot of the client's accounting history, including invoices, payments, adjustments, and unbilled activity. Click on the Accounting tab to be taken to the screen below:

Alan J. Corbett

[Add Time](#)
[Add Expense](#)
[Create Invoice](#)
[Client Budget](#)
[Edit](#)
[Disable](#)

[Details](#)
[Invoice Presets](#)
[Billing Rates](#)
[User Access](#)
[Contacts](#)
[Locations](#)
[Notes & Files](#)
[Accounting](#)
[Trust Account](#)

[Receive Payment](#)
[Balance Adjustment](#)
[Save](#)

Billed Balance: **\$88.31**
 Credit Limit:

Unbilled Balance: **\$0.00**

Total Balance: **\$88.31**

Date ▲	Number	Description	Credit	Debit	Balance
11/16/2017	Invoice 10395 (Unpaid)	Single invoice for Alan J. Corbett - Revision		\$248.00	\$88.31
10/17/2017	Invoice 10367 (Paid)	Single invoice for - Revision		\$604.60	(\$159.69)
02/08/2017	Payment (Trust Account)		\$3,192.68		(\$764.29)
01/31/2017	Invoice 10286 (Paid)	Single invoice for - Revision		\$1,216.16	\$2,428.39
01/13/2017	Invoice 10275 (Paid)	Single invoice for - Revision		\$1,212.23	\$1,212.23
12/14/2016	Payment (Trust Account)		\$1,807.32		\$0.00
12/01/2016	Invoice 10250 (Paid)	Single invoice for - Revision		\$1,807.32	\$1,807.32

Figure 25: Client Accounting

If you click on an invoice it will bring you to the Invoice Details page for that invoice. You can also click the Print & PDF buttons to open and save an invoice from this page as well. "Unbilled Activity" represents time entries and expenses that have been entered for the client that have either not been billed or not on a finalized invoice.

A **Balance Adjustment** can be used either for a debit on the account not related to either a fee or expense or a credit which can be used to write off a balance or credit an account.

1. Click the *Balance Adjustment* button and a pop-up window will open (Figure 26).
2. Enter in the amount.
3. Click on the calendar icon to select a date of the adjustment.
4. Select *debit* or *credit* for the adjustment type.
5. The Public Note is shown on the invoice and under the Accounting tab. The Private Note is only for internal reasons. The only way to access the saved Private Note, is to see the Balance Adjustment Details pop-up window.
6. If the adjustment is a credit you can apply this to any open invoices
7. Then click Save when finished

New Balance Adjustment

Client:

Project:

Amount:

Date:

Type:

Public Notes:

Private Notes:

[Save & Duplicate](#)
[Save](#)
[Cancel](#)

Figure 26: Enter Balance Adjustment

A payment can be entered and applied to invoices to deduct from the total outstanding:

1. Click the *Receive Payment* button.
2. Choose a specific *Project* to reflect the unpaid invoices or keep it set to All to show all invoices outstanding for any project.
3. Enter in the payment *Amount*.
4. Change the date if needed.
5. Select the *Payment Method*.
6. Enter in the *Reference number* (optional)
7. Put in a description in the *Notes* field (optional)
8. Check the box next to specific invoice(s) you want this payment applied to – the Applied Amount will automatically calculate based on how the “Amount” is filled in.
9. Click *Save*

Receive Payment

Client: Greg Sherman

Date: 07/23/2018

Project: All

Method: Check

Amount: \$0.00

Reference #:

Notes:

Unpaid Invoices 2

Amount Remaining: \$0.00

<input type="checkbox"/>	Invoice	Date	Project	Total	Balance	Applied Date	Applied Amount
<input type="checkbox"/>	21656	01/31/2017	General	\$1,987.50	\$1,987.50	07/23/2018	\$0.00
<input type="checkbox"/>	21677	03/31/2017	General	\$1,159.25	\$1,159.25	07/23/2018	\$0.00

Save

Save & Duplicate

Cancel

Figure 27: View/edit payment or adjustment

Trust Account

This tab will allow you to keep track of trust account transactions for each client and associated projects. Note that Trust Accounting is only available on Bill4Time Legal plans. This enables you to manage your trust account balance without affecting the balance the client owes your company.

Click on the Trust Account tab to display the screen below:

Greg Sherman

Add Time

Add Expense

Create Invoice

Client Budget

Edit

Disable

Details

Invoice Presets

Billing Rates

User Access

Contacts

Notes & Files

Notifications

Accounting

Trust Account

Add Deposit

Add Disbursement

Transfer In

Transfer Out

General Project Trust Credit: \$0.00

Bank Account: IOLTA-345839400

All Project Trust Credit: \$5,194.39

Project: General Project Trust

Total Trust Credit: \$5,194.39

Date	Transaction	Project	Clear Date	Credit	Debit	Balance
10/01/2017	Received From-Greg Sherman	General Project Trust		\$5,000.00		\$0.00
06/30/2017	Smith & Smith, LLC	General Project Trust			\$5,000.00	\$0.00
05/01/2017	Received From-Greg Sherman	General Project Trust	07/05/2017	\$5,000.00		\$5,000.00

Figure 28: Client Trust Account

1. **Add Deposit** – Used to record payments intended to add funds to the trust account.
2. **Add Disbursement** – Used to record withdrawals to pay fees that are not towards your firm.
3. **Transfer In** – Transfer In allows you to transfer funds from another project trust into this trust.

4. **Transfer Out** – Transfer Out allows you to transfer funds from this trust to another project trust.
5. **Bank Account** – This is a required field in order to enter a trust accounting entry. Add a bank account by clicking the list icon.
6. **Project** – This filters the trust account activity to relevant projects:
 - a. **General Project Trust** – All entries that deal with the trust account not associated to a particular project. For example, a client gives you a check for this retainer, and he doesn't have a preference to how the check is spread out to the various open projects.
 - b. **All Project Trusts** – All entries that were assigned to specific projects. These are all of the activities that each are assigned to particular projects. To see all entries assigned to a specific project"
 - c. **General Project Trust + All Project Trusts** – All entries entered under the *Trust Account* tab for this client.
 - d. **The names of the individual projects** – All entries assigned to the named project. For example, a client gives you a check and wants it specifically spent for that particular project.



Rule of Thumb It's best to use the General Project Trust account when your client has only one case or matter. You can also use the General Project Trust account if your client has multiple cases or matters, but the money in the trust account is not assigned specifically to any one of the cases.

Add Deposit

Client: Greg Sherman

Project: General Project Trust

Amount:

Date: 02/27/2018

Bank Account: IOLTA-345839400

Transaction: Received From-Greg Sherman

Notes:

Check #:

Check Image: Browse... No file selected.

Date Cleared:

Void Check: ☐

Save Cancel

Add Disbursement

Client: Greg Sherman

Project: General Project Trust

Amount:

Date: 02/27/2018

Bank Account: IOLTA-345839400

Made To:

Notes:

Check #:

Check Image: Browse... No file selected.

Date Cleared:

Void Check: ☐

Date Voided:

Void Reason:

Save Cancel

Figure 29: Add Deposit/Disbursement

Section 5: Projects

A project is pertinent to a client, to which activities such as work, expenses, and scheduled items will be associated. With the User>Client>Project tier, you can have multiple projects per client, but you cannot have multiple clients per project.

Much like Clients, once you go to Project Management you can view all projects and click to create a New Project to view the screen below:

Note: As mentioned previously in the Settings portion, you have the ability to adjust your Project Mnemonic to any term you use. Your firm may be instead use Matter, Case, File, etc. but for the purpose of this guide, we will continue to use the term “Project.” If your firm has renamed the Project Mnemonic the new term will be used throughout your Bill4Time interface.

New Project

Save

Cancel

Project Details

Project Id: Project Name: Client: +Client Contact: Assigned To: Email: Project Type: Billing Method: Payment Due Upon:
 Subscribers:

- ☐ & Smith, LLC, Smith
- ☐ Bacon, Kevin
- ☐ Bond, Kimberly
- ☐ Finn, Tracy
- ☐ Fitzgerald, George
- ☐ Formanski, Mary
- ☐ Jones, Charles

 Description:

Project Settings

ABA Codes: Minimum Trust Balance: Hide Time from Invoices: ☐Hide Expenses from Invoices: ☐

Figure 30: Add New Project

Creating a Project

The only required field (as denoted with the light blue text box) is the Client Name & Matter name. The notable optional fields are as follows:

- **Project ID** – If not filled in, a numerical ID will automatically assign itself to the client.
- **Project Name** – Here you can enter the projects name
- **Client Name** – Enter in your clients name here. If you have not added the client yet you can click the plus icon to add one.
- **Client Contact** – You can enter in a contact per Project if needed.
- **Assigned To** – Select which user this project is assigned to.
- **Project Type** – Here you can segregate your projects any way you want to make project management easier. You can click the plus icon to view and edit your project types which can be useful on reports.
- **Billing Method**
 - **Hourly** – All entries saved will bill at the hourly rates setup in the system.
 - **Contingency** – This project is billing at a percentage of a settlement fee. All entries saved will be non-billable by default allowing you to track the hours worked but at no dollar amount. Once you receive the settlement fee add one more time entry and change the Entry Type from Hourly to Case Closing Settlement. That will allow you to enter in your settlement amount to bill on your invoice.
 - **Flat Fee – Reoccurring** – All entries are billable and will bill at the flat fee setup in the system. This method is basically for billing a certain fee each month and not tracking hours worked.
 - **Flat Fee – One Time** – All entries saved will be non-billable by default allowing you to track the hours worked but at no dollar amount. Once you are ready to bill the project you would add one more entry and change the Entry Type from Hourly to Project Closing Fee to fill out the rest of your entry and save it. This will allow you to track the hours worked and only bill the flat fee whenever needed.
- **Payment Due Upon**
 - **Bill regularly for time** – This setting enables you to still generate invoices while the project is still open. Regardless of your flat rate setting, you will be able to create invoices. For one-time flat fee projects, your invoices will show the work entry as “unbillable” (i.e. There is no hourly rate attached to these work entries) but still included on the invoice. This still requires you to go through the normal billing procedures.
 - **Bill at Project closing** – This setting only allows you to create an invoice when the project status is closed. Even though you have work entries recorded, you will not see this project available when you are on the “New Invoice Batch” screen unless you close the project.
- **Subscribers** – You can use Subscribers to allow alerts for users as well as customize user access on a per client level.
- **Description** – You can setup a description per matter which is strictly internal.
- **ABA Codes** – Turn this on or off, depending on the ABA code setting in the Firm/System settings. This enables you to custom the ABA code setting for each project.
- **Minimum Trust Balance** – Enter a minimum trust balance here for tracking purposes only.
- **Hide Time from Invoices** – This defaults all time entries to be set to “Exclude from Invoice” so they are never billed.
- **Hide Expenses from Invoices** – This defaults all expense entries to be set to “Exclude from Invoice” so they are never billed.

When you are finished, click the *Save* button to commit the project to the system, and you will be taken to the *Project Details* screen. The Projects have the same options as in your Clients, which will allow you to update the Invoice Presets, Rates, Contacts, Notes/Files, etc per each project if necessary.

Section 6: Invoicing

When you go through invoicing, you can either create single invoices or batches. Once you click into *Invoicing* in your blue menu bar you will be at the page below. Once on Invoice management you will be able to view all invoices created in the past, when they were created, their current status, and the totals amount per invoice or batch.



For more advanced invoicing tips and further invoicing information, visit:
<https://bill4time.zendesk.com/forums>

You can also search by Batch IDs, Created Date From & To, Status, and Invoice Date. You can click into any invoice to view and edit if the invoice is still set to a Pre-bill.

Click on the blue *Invoicing* tab to display the menu below:

Invoicing

Find Invoice Create Invoice Create Draft Create Statements

Batch ID: Status:

Create Date (From): Invoice Date:

Create Date (To):

Type	ID	Description	Invoice Date	Created	Status	Paid	Invoices	Total
MC=Multiple Currencies in batch								
Batch	1146	Multiple invoice batch	11/16/2017	11/16/2017	Pre-Bill		5	MC +
Invoice	10391	Single invoice for Charlie Bradbury	11/01/2017	11/01/2017	Finalized		1	\$11,039.70
Batch	1144	Multiple invoice batch	10/30/2017	10/30/2017	Finalized		17	\$34,289.96
Invoice	10372	Single invoice for Amanda Burns - Unnamed (10309)	10/30/2017	10/30/2017	Finalized		1	\$225.92
Batch	1142	Multiple invoice batch	10/17/2017	10/17/2017	Finalized		5	\$2,581.75
Invoice	10366	Single invoice for James Anderson	10/17/2017	10/17/2017	Finalized		1	\$483.68
Invoice	10365	Single invoice for Katie Alvers	10/01/2017	10/17/2017	Finalized	✓	1	\$225.00
Batch	1139	Multiple invoices for City	09/28/2017	09/28/2017	Finalized	✓	2	\$0.00
Batch	1138	Multiple invoice batch	09/28/2017	09/28/2017	Finalized		7	\$3,518.90
Batch	1137	Multiple invoices for - Margaret Masters	09/28/2017	09/28/2017	Finalized		2	\$2,404.91

Show: 10 Results

Prev 1 2 3 4 Next

Figure 31: Invoice Management screen

Creating the Invoice Batch

When creating your invoices, go through Create Invoice to get to your New Invoice Batch screen.

1. First, select a date range. You can check the box to select a “Billing Start Date” but keep in mind this is not required and does not show on invoices. If not checked, the system will automatically pull everything up till your Through Date. Your “Billing Through Date” is your stop date and your “Invoice Date” is just the date of the invoice.
2. Select which clients & projects to bill.
3. Put in a description for this batch, if you desire.
4. Click the *Save* button. The invoices are created and will be set with a “Pre-Bill” status.




Remember

- 1) An invoice batch can include as many invoices as you want.
- 2) All invoices start off with a “Pre-Bill” status.

The first step to invoicing your clients is to create a new batch of invoices. Click on the *Create Invoice* button to be taken to this screen:

New Invoice



Invoice Details

Batch Id:



Off Month Batch: ☐


Invoice Start Number:

Batch Description:

Single invoice for Greg Sherman - General (10-1540)

Billing Start Date: ☐

 Billing Through Date: 

Invoice Date: 

Select Clients

Payment Due Upon:

Account Manager:

Project Type:



<input type="checkbox"/> Client	Labor	Expense Items	Invoice Amount	
 <input checked="" type="checkbox"/> Greg Sherman	6	2	\$2,414.25	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> General (10-1540)	6 <input checked="" type="checkbox"/>	2 <input checked="" type="checkbox"/>	\$2,414.25	<input checked="" type="checkbox"/>
<input type="checkbox"/> Jack & Martin	1	1	\$750.00	<input type="checkbox"/>
<input type="checkbox"/> ...	1	1	\$750.00	<input type="checkbox"/>

Figure 32: Creating New Invoice

Reviewing Invoices in the Batch

All entries in your invoice batch will list separately. You can click into each invoice individually to make the edits you need (Figure 33)

Invoice Batch

Create PDF

Create ZIP

Print on Letterhead

Print

Edit

Delete

Back

Batch ID: 1750

Description: February 2018

Off Month Batch: No

Batch Status: Pre-Bill

Billing Through Date: 02/28/2018

Invoice Date: 02/28/2018

Batch Total: \$13,612.63

Invoices		Trust Payments						Finalize	Unfinalize
<input type="checkbox"/>	Invoice ID	Client	Project	Labor Items	Expense Items	Status	Invoice Amount	Paid	Email
<input type="checkbox"/>	21786	123 - Frank Cole	Family Law	13	7	Pre-Bill	\$6,298.38		
<input type="checkbox"/>	21792	Anderson, Tom	Multiple Projects	7	0	Pre-Bill	\$2,962.50		
<input type="checkbox"/>	21793	Bill Jones	Development Contract	8	0	Pre-Bill	\$1,037.50		
<input type="checkbox"/>	21797	Greg Sherman	General	6	2	Pre-Bill	\$2,414.25		
<input type="checkbox"/>	21798	Mocha Joes	Corporate	4	0	Pre-Bill	\$900.00		

Figure 33: View Invoice Batch

You will now see a list of invoices that are included in this batch. Notice how all invoices are showing in “Pre-Bill” status.

From this screen your options are:

1. **Create PDF** – Create a PDF of all of the listed invoices in the batch. Once all of the invoices are finalized. Each invoice will be on a separate page in one PDF.
2. **Create ZIP** – Create ZIP allows you to save a zip file with each invoice as a PDF separately.
3. **Print on Letterhead** – Prints all invoices in your batch without your default header so you can print the invoices to separate sheets of paper with your own letterhead.
4. **Print** – Prints all invoices in your batch. Each invoice will print separately.
5. **Edit** – This allows you to edit/add/remove what clients/projects are included in the batch. Once all invoice are finalized in your batch, you will no longer be able to edit the batch.
6. **Delete** – This will delete the entire batch of invoices. All of these invoices will be deleted, but none of the work/expense entries are lost. All entries go back to unbilled activity, so you can create invoices again for these items.
7. **Back** – The Back button will take you back to the previous screen you were on.
8. **Finalize/Unfinalize** – You will see check boxes to the far left of the invoices. You can check the boxes and use the Finalize and Unfinalize buttons to mass update your batch.
9. **Trust Payments** – Trust Payments allows you to view the trust balances available and to pay for each invoice from Trust.

The next step in the billing process is to go through each of the Invoices, ensure they are correct, and finalize them.

Viewing and Editing Invoices

From this screen you can review the invoice and make any necessary corrections to it before finalizing or printing. Hover over an entry and click it to open and make changes. When finished, click the Save & Close button. Those changes will immediately be reflected on the invoice. The following options are available from this screen:

Invoice 21797

Print

Create PDF

Finalize

Edit

Delete

Save

Back

Invoice Details

Invoice Summary

Payments

Prev


Next

Invoice #: 21797

Client: Greg Sherman

Invoice Date: 02/28/2018

Billing Through: 02/28/2018

Terms: Due Upon Receipt 


Discount: Percentage 0.00 %

[Discount Options](#)

Batch ID: 1750

Status: Pre-Bill

Paid Status: Not Paid

Group by Project : ☒

Labor Tax Rate: 0.0000%

Tax 2 Rate: 0.0000%

Expense Tax Rate: 0.0000%

Tax 2 Rate: 0.0000%

Labor Total: ☐ \$ 967.50

Expenses Total: ☐ \$ 75.00

Invoice Description: Single invoice for Greg Sherman - General

Invoice Notes:

General (Labor)

Date	By	Service Summary	Hours/Rate	Amount
12/05/2017	JS	Meeting Meeting with client.	5.00 at \$ 0.00/hr	No Charge
12/08/2017	JS	Documentation Wrote documentation on case.	3.50 at \$ 215.00/hr	\$752.50
02/20/2018	JS	Phone Call Phone call with so and so	1.00 at \$ 215.00/hr	\$215.00

General (Expenses)

Date	By	Service Summary	Hours/Rate	Amount
01/10/2018	JS	Meal Lunch meeting with client.	--	\$75.00

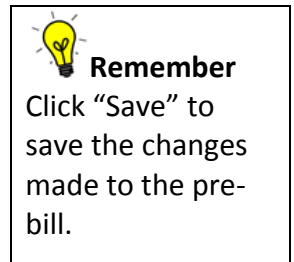
Total Hours:	9.50 hrs
Total Labor:	\$967.50
Total Expenses:	\$75.00
Total Invoice Amount:	\$1,042.50
Previous Balance:	\$4,226.88
10/25/2017 Payment	(\$4,226.88)
Balance (Amount Due):	\$1,042.50

Figure 34: Viewing Invoice

- **Print** – Shows the invoice as a print preview, ready to be printed. If the invoice is still in “Pre-Bill” status, the printout will reflect this status.
- **Create PDF** – Creates a PDF of the invoice. If the invoice is still in “Pre-Bill” status, the PDF will reflect this status. With this PDF, you can print it, save it, or attach it to an email.
- **Finalize (Unfinalize)** – Marks the invoice as “Finalized,” locks all invoice edits, and automatically brings up the next invoice in “Pre-Bill” status. Once Finalized, there will be an Unfinalize button that will allow you to put the invoice back into a pre-bill state to make further edits.
- **Edit** – Click to Edit the invoice to bring you back to the Invoice Batch page which will allow you to bring in new entries or add more clients/projects to your existing batch.
- **Delete** – Deletes the invoice from this batch.
- **Save** – Saves all invoice edits. However, this does not finalize the invoice. It may still be subject to other edits in the system (eg: billing rate change).
- **Back** – Brings you back to the previous screen or the previous invoice in this batch.
- **Prev/Next** – Takes you to the Previous or Next invoice in the batch.
- **Invoice Details** – The details page will allow you to make further changes to the pre-bill (more information below) and edit the entries within the pre-bill.
- **Invoice Summary Tab** – Completely summarizes your invoice with a single listed item showing the date span, summary detail, total hours, and total amounts. This is particularly useful when you bill retainers and you want to show clients only the total time billed and the total billed amount to the retainer.
- **Payments Tab** – Allows you to apply payments that may have already been saved as well as creating new payments.

The following are further options that can be made at the pre-bill level (*Figure 34*):

- **Invoice Date** – Select the date of the invoice
- **Billing Through** – Select the billing through date to update or bring in new entries
- **Invoice Terms** – Applies payment terms on invoices. Choose from the pull-down menu or click the pencil icon to edit the current list and add your own payment term.
- **Invoice Discount** – Applies an invoice discount at either a percentage or flat amount. You can also use the *Discount Options* link to apply it to just labor, expenses, or both.
- **Invoice Description** – This is an internal title and will show on invoice management and reports.
- **Invoice Notes** – Includes an invoice note which will show on the bottom of the last page of the invoice.
- **Export LEDES 98B File** – Exports the invoice to a LEDES 98B File. Make sure you enable this feature in the Firm/System settings.
- **Group by Project** – If unchecked, the invoice items will be listed chronologically, without grouping them by project. If checked, the invoice items will be grouped by project and listed chronologically.
- **Write up/down Labor/Expense Totals** – Enables you to have a fixed amount for labor and/or expenses, while still maintaining the hours, a rate per hour, and individual expense amounts.



Smith & Smith, LLC
 252 Broadway
 Suite 12
 New York, NY 11245



Greg Sherman
 Attn: Leslie N McDonald
 210 22nd St
 18th Floor
 New York, NY 10001

Invoice 21802

PRE-BILL

Date	Mar 02, 2018
Terms	Due Upon Receipt
Service Thru	Mar 02, 2018

In Reference To: General (Labor)

Date	By	Services	Hours	Rates	Amount
12/05/2017	JS	Meeting: Meeting with client.	5.00	\$ 0.00/hr	No Charge
12/08/2017	JS	Documentation: Wrote documentation on case.	3.50	\$ 215.00/hr	\$ 752.50
02/20/2018	JS	Phone Call: Telephone call to client to discuss upcoming meeting	1.00	\$ 215.00/hr	\$ 215.00

In Reference To: General (Expenses)

Date	By	Expenses	Amount
01/10/2018	JS	Meal: Lunch meeting with client.	\$ 75.00

			Total Hours	9.50 hrs
			Total Labor	\$ 967.50
			Total Expenses	\$ 75.00
			Total Invoice Amount	\$ 1,042.50
			Previous Balance	\$ 0.00
			03/02/2018 Payment - Check Split Payment	(\$4,226.88)
			Balance (Amount Due)	\$ 1,042.50

Figure 35: Sample Pre-Bill

Once you have reviewed all items on an Invoice and feel it is complete, click the *Finalize* button to change the Invoice from *Pre-Bill* to *Finalized* status. At this point, the Invoice is ready to be printed and sent to the client.

Once you have gone through and edited your batch of invoices to finalize them, you can then go through and send them to clients.

Print and Send Invoices

Now that the batch is closed, there will be buttons to either *Create PDF*, *Create Zip*, *Print on Letterhead* or *Print* – this will allow you to print the entire batch of Invoices, so they can be mailed or e-mailed.

You also have the option to send your client an email directly from Bill4Time. Click the envelope icon next to a finalized invoice to get to this screen below:

Once you open the Email Invoice pop you can see the options available. This will show the Clients name and Invoice number. If you click to generate the invoice link you can see the invoice as the client sees it. You can choose a contact from your list and choose who the email is being sent from. You can enter multiple people in the To and CC fields and enter the Subject and Body as needed. Once finished click *Send*. Once your client receives the email and clicks the link they will get sent to their client portal which is shown below:

From their client portal they can click to Print the invoice, download a PDF, and click “Pay Now” if payment options in the portal settings were enabled. *To learn more about this feature go to page 14 in the Guide for instructions on how to set this feature up in your account.*

Figure 36: Email Invoice

Invoice 21802

Smith & Smith, LLC
252 Broadway
Suite 12
New York, NY 11245



Greg Sherman
Attn: Leslie N McDonald
210 22nd St
18th Floor
New York, NY 10001

Invoice 21802

Date	Mar 02, 2018
Terms	Due Upon Receipt
Service Thru	Mar 02, 2018

In Reference To: General (Labor)

Date	By	Services	Hours	Rates	Amount
12/05/2017	JS	Meeting: Meeting with client.	5.00	\$ 0.00/hr	No Charge
12/08/2017	JS	Documentation: Wrote documentation on case.	3.50	\$ 215.00/hr	\$ 752.50
02/20/2018	JS	Phone Call: Telephone call to client to discuss upcoming meeting	1.00	\$ 215.00/hr	\$ 215.00

In Reference To: General (Expenses)

Date	By	Expenses	Amount
01/10/2018	JS	Meal: Lunch meeting with client.	\$ 75.00

Total Hours	9.50 hrs
Total Labor	\$ 967.50
Total Expenses	\$ 75.00
Total Invoice Amount	\$ 1,042.50
Previous Balance	\$ 0.00
03/02/2018 Payment - Check Split Payment	(\$4,226.88)
Balance (Amount Due)	\$ 1,042.50

Pay Now

Account Balance:
\$1,042.50

Invoice Total:
\$1,042.50

[View full account history](#)

Figure 37: Client Portal Preview

Find Invoice

From Invoice Management click **Find Invoice** to get you to this screen:

Invoice Search

[Print Invoices](#)

Client Filter:
Project Filter:

<input type="checkbox"/>	Id	Client	Project	Description	Batch	Bill Through	Status	Paid	Invoice Total
<input type="checkbox"/>	10397	- Margaret Masters	Lurking in the Apocalypse	Single invoice for - Margaret Masters - Lurking in the Apocalypse (5148)	1147	12/14/2017	Pre-Bill		\$8.00
<input type="checkbox"/>	10396	Amelia Richardson	Copyright Conflict	Multiple invoice batch	1146	11/16/2017	Pre-Bill		\$622.00
<input type="checkbox"/>	10395	Alan J. Corbett	Revision	Multiple invoice batch	1146	11/16/2017	Pre-Bill		\$248.00
<input type="checkbox"/>	10394	Adam Milligan	Technical	Multiple invoice batch	1146	11/16/2017	Pre-Bill		\$450.00
<input type="checkbox"/>	10392ABC	- Margaret Masters	Lurking in the Apocalypse	Multiple invoice batch	1146	11/16/2017	Pre-Bill		\$400.00
<input type="checkbox"/>	10391	Charlie Bradbury	Sip's Six Vengeance	Single invoice for Charlie Bradbury	1145	11/01/2017	Finalized		\$11,039.70
<input type="checkbox"/>	10390	Staci Altman	The Proud History	Multiple invoice batch	1144	10/30/2017	Finalized		\$2,300.92
<input type="checkbox"/>	10389	Scott Carey	Pure Leaf	Multiple invoice batch	1144	10/30/2017	Finalized		\$451.85
<input type="checkbox"/>	10388	Samuel Campbell	Rebels of War	Multiple invoice batch	1144	10/30/2017	Finalized		\$602.47
<input type="checkbox"/>	10387	Richard Beesome	Desert Planet	Multiple invoice batch	1144	10/30/2017	Finalized		\$4,016.44

Show:

Figure 38: Invoice Search

If you know the Invoice # that you would like to see, enter that into the **Invoice #** field and click **Search**. You can also filter the list by client and Project by clicking on the *Client* drop-down to select a specific client and see all Invoices for that client.

Create Draft

In the **Invoice Management** click Create Draft. This will bring you to the figure below where you can select a client and project. Create Draft is a great way to view the unbilled activity for a particular client and project without creating an invoice.

First choose the Client filter and pick a Client. Your Projects will then pull up and you can choose from the drop down to either view All Projects or pick one at a time.

Once you choose your Client/Project(s) click the **Create** button.

Invoice Draft

Client:
Matter:

Figure 39: Create Draft

Smith & Smith, LLC

DRAFT

Create Invoice

Invoice submitted to:
Cristi Mendez
22 Andell Rd
Alice, TN 78232

Invoice #	N/A
Invoice Date	03/16/2018
For Services Through	03/16/2018

Date	By	Service Summary	Hours/Rate	Amount
In Reference To: Divorce (Labor)				
12/19/2017	KNO	Meeting Meeting with client.	3.50 at \$150.00/hr	\$525.00
01/03/2018	KNO	Review Planning and drafting	2.50 at \$150.00/hr	\$375.00
01/04/2018	KNO	Emails Emails tracked to/from client.	3.00 at \$150.00/hr	\$450.00
02/21/2018	JS	Draft Planning and drafting	2.50 at \$100.00/hr	\$250.00

Total Hours: 11.50 hrs
Labor: \$1,600.00
Total Amount: \$1,600.00

Total Labor: \$1,600.00
Total Invoice Amount: \$1,600.00
Previous Balance: \$1,737.50
Balance (Amount Due): \$3,337.50

Figure 40: Draft Invoice

Here you can view and edit the entries to make changes. If you are satisfied and still are working on the Project, just exit out of the pop-up. If you are satisfied with the Invoice and are finished entering entries for this Client/Project, then click the Create Invoice button which brings you to the Invoice Details screen in Invoice Management where you can Finalize and Print it.

Create Statements

Lastly in Invoice Management click **Create Statements** button to bring you to the figure below.

Create Statements

Create Statement

Statement Filter: Clients with outstanding balances ▼

Client Status: Active Clients ▼

Account Manager: All ▼

Display Firm Logo ☒

Display Firm Address ☒ Center ▼

Display Firm Footer ☐

Start Date:

End Date:

Exclude Recently Invoiced ☐

Display Country on client address ☐

<input type="checkbox"/>	Client Name	Client Id	City	State	Zip	Account Manager	Balance	Status
<input type="checkbox"/>	123 - Frank Cole	34	Brooklyn	NY	11220	Jane Smith	\$4,342.04	Active
<input type="checkbox"/>	ABA client	277				Tracy Finn	\$9,058.36	Active
<input type="checkbox"/>	Abigail Barnes	173	New York	NY	20001	Jane Smith	\$8,900.24	Active
<input type="checkbox"/>	Alexis Kline	68				Mary Formanski	\$5,857.90	Active

Figure 41: Create Statements

Filters to choose from are as follows:

- **Statement Filter** – This allows you to show all clients or only clients with Outstanding balances
- **Client Status** – Choose from Active Clients, Disabled Clients, or All Clients.
- **Account Manager** – Choose from any account managers in the account
- **Display Firm Logo** – Uncheck this if you choose not to print the Logo together with your header
- **Display Firm Address** – Uncheck this if you choose not to print the client address with the logo. Also you have the option put your header either Left, Center, or Right of your page.
- **Display Firm Footer** – Check to display the footer note setup in the settings
- **Start Date** – Pick a specific start date that pulls the data onto the statement
- **End Date** – Pick a specific end that that pulls the data onto the statement
- **Exclude Recently Invoiced** – This filter allows you to eliminate any clients/projects that have been billed in the last 15 or 30 days.
- **Display Country on client address** – If checked displays the countries address from client settings.

You can print out statements for your Clients (and projects) who have outstanding balances. Check off the Clients/Projects you would like to Print out or check all by checking the box next to “Client Name” and click the Create Statement button.



Smith & Smith, LLC
252 Broadway
Suite 12
New York, NY 11245

Statement submitted to:

Greg Sherman
 Attn: Leslie N McDonald
 210 22nd St
 18th Floor
 New York, NY 10001

Date of Statement: **Friday, March 16, 2018**
 Account: **General**

<u>Date</u>	<u>Item</u>	<u>Description</u>	<u>Credit Amount</u>	<u>Debit Amount</u>	<u>Balance</u>
01/31/2017	Invoice #21656	Single invoice for Greg Sherman - General (10663)		\$1,987.50	\$1,987.50
02/09/2017	Payment - Trust Account		\$1,987.50		0.00
03/31/2017	Invoice #21677	Single invoice for Greg Sherman - General (10663)		\$1,159.25	\$1,159.25
04/12/2017	Payment - Trust Account		\$1,159.25		0.00
05/24/2017	Invoice #21678	Single invoice for Greg Sherman - General (10663)		\$2,658.86	\$2,658.86
05/24/2017	Payment - Trust Account		\$2,658.86		0.00
10/07/2017	Invoice #21784	September 2017		\$4,226.88	\$4,226.88
03/02/2018	Invoice #21802	Multiple invoice batch		\$1,042.50	\$5,269.38
03/02/2018	Payment - Check	Split Payment	\$4,226.88		\$1,042.50

Total Amount Due: \$1,042.50

Figure 42: Print Account Statement

You can print these out in batches or pick which statements to print out individually and send them to your clients. Remember to make payments and balance adjustments just go into the **Accounting** tab from the Menu screen or in each Client or Projects account.