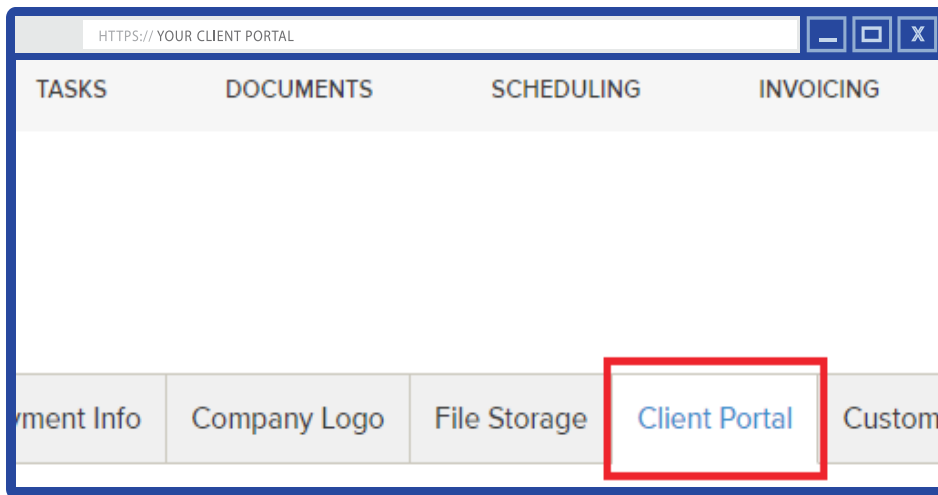# BILL4TIME

Client Portal
Quick-Start Settings Guide

From start to finish, admin to user, we will quickly cover each setting in your Client Payment Portal. This will only take a few minutes, we promise.

SETTING UP YOUR CLIENT PORTAL

To access your Client Portal settings, begin by clicking on your name at the top right of any page and select **"Settings"** in the drop-down menu. From there, locate the **"Client Portal"** sub-tab.

Please note: if you do not have access to "Settings" in your drop-down menu, you will need to contact your System Admin to grant you these permissions.
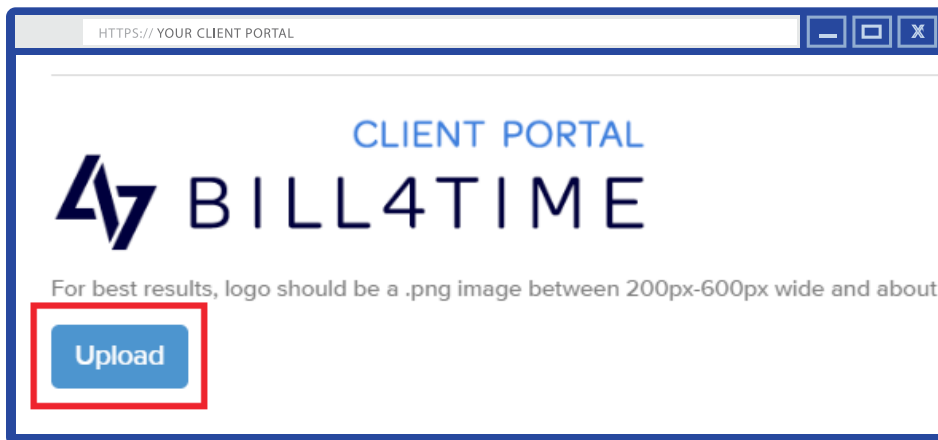

PERSONALIZE YOUR PORTAL LOGO

You may upload your own logo, to customize your portal's log-in page, as well as the invites and invoice emails you send to clients.

Simply click on the blue **"Upload"** button (on your Client Portal settings page), then select your logo file.

Please note: for best results, your logo should be in .PNG image format, and measure between 200-600 pixels wide by 200 pixels tall.
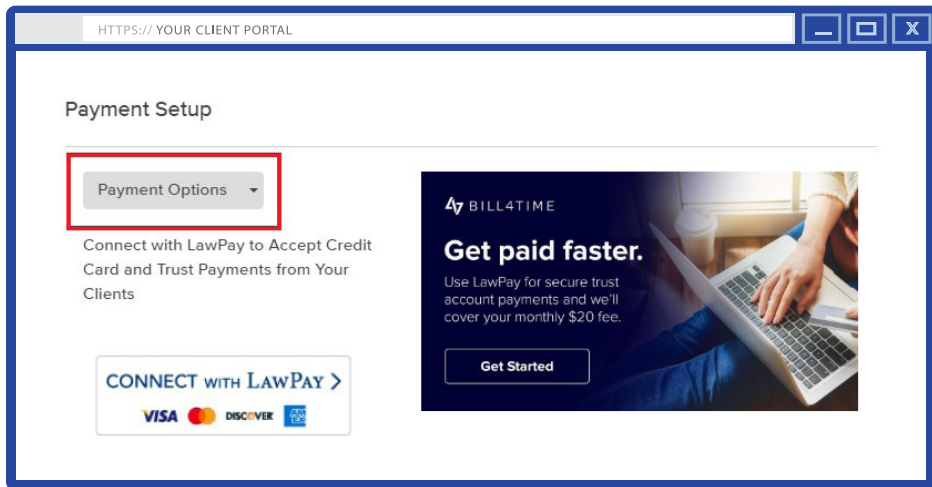
CONFIGURING ONLINE PAYMENTS

LawPay is the most trusted and secure online payment processor for lawyers. It was designed specifically to meet ethical requirements for legal trust accounting.

Ask us for more details on how to get the $20/monthly account fee waived for new LawPay users!

In addition to LawPay, you can also enable integrations with PayPal or Stripe. You can also set up a custom payment link, to direct customers to your own external payment portal.

CLIENT PORTAL SETTINGS

Before you invite clients to make payments via your Bill4Time Client Portal, you'll want to review the following settings:

SEND AUTOMATIC INVOICE EMAILS - (*Recommended setting: Yes*)
Your client portal can help alert your clients when there are new invoices waiting to be paid! If you've selected "Yes" for this setting, automatic notification emails will be sent to clients when their invoices are "finalized". (Note: this only sends emails to clients who you have invited to your portal)

ALLOW ACH PAYMENTS - (*Optional*)
If you're integrated with Stripe, selecting "Yes" will allow your clients to pay their invoices via ACH payments!

INVOICE LINK EXPIRATION - (*Recommended setting: 60 days*)
This setting allows you to limit the length of time that your invoice email links will be active. You have the option to customize this from 30, 60, or 90 days, up to 6 months or 1 year. If you prefer that these links always remain active, simply select the "Never" option instead.

ALLOW CLIENTS TO VIEW THEIR ACCOUNT HISTORY
(*Recommended setting: Yes*)
Selecting "Yes" will allow your clients the option to view their billing/payment history. If you would prefer that clients not have access to this information, select "No" instead.

(Note: Blue buttons indicate your currently selected settings.)

DISPLAY CALCULATED INVOICE BALANCES - (*Recommended setting: Yes*)
This option controls automatic calculation of invoice balances. When 'Yes' is selected, their payments will be subtracted from the invoice total, and clients will see the remaining balance left to be paid. When 'No' is selected, your client will only be able to see the exact amount of the invoice and any payments they make will not be subtracted from that amount.

ALLOW GUEST ACCESS - (*Recommended setting: No*)
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: 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.)

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INVITE YOUR CLIENTS

Once you've confirmed your portal's security settings, it's time to start inviting your clients! To do this, click on the "Invites" text link, enter your client's email address in the "Invite" email field, and select the client(s) you'll be giving them access to. Then click "Send Invite".

CLIENT ACCESS PERMISSIONS

Most of your portal users will be associated with a single client profile or business entity.

If you have a client that will be handling more than one business or client's billing in your portal, you can associate their portal account with multiple entities. Just click "Add Client" and select any additional client profiles they need access to.

(Note: you can edit/remove this access as needed, within the "User Permission" portion of your portal settings.)

VIEW SENT INVITES

Clicking on "View Sent Invites" will display the status of your portal's invitations in real-time. Below is a quick breakdown of this info:

DATE & EMAIL
These columns display the email address your invite was sent to, and the date it was sent.

CLIENT
This column displays the client(s) access associated with each user's portal invitation.

(Note: If you've allowed access to the wrong client(s) and the user has already accepted their invite, you can remove that access on the "User Permissions" page. If the user has not accepted your invitation yet, simply send a new invite with the correct client(s) selected. This will cancel the previous invite and update their access.)

PORTAL INVITE STATUS KEY

ACCEPTED: This invitation has been received and your client has successfully created their portal account.

WAITING: This invitation email has been sent, but your client has not created an account yet. (Note: client portal invites only remain valid for up to 7 days.)

EXPIRED: This invitation has expired. This may be due to 7 days of inactivity or due to an updated invite being sent to this same email address. If an invite has expired, you will need to send a new invite. QUICK

From: yourclient@email.com
To: no-reply@bill4time.com
Subject: Customer Portal Invitation

Smith & Smith Corp Client Portal Invitation Inbox ×

Smith & Smith Corp <no-reply@bill4time.com>
to me ▾

Smith & Smith Corp

Sign Up for the Client Portal

Create Your Account

Smith & Smith Corp has invited you to join their client portal, where you can pay invoices, view your payment history, and more! To get started, just click the link above.

If the link above doesn't work, try this url:

http://sandsco.b4tportal.com/welcome?invite=5d93c0157cdf1c194cf3b26e

**Powered by Bill4Time**

Terms | Privacy | Security

PORTAL INVITATION EMAILS

Once you've invited your client to the portal, they will receive an email containing a link for creating an account.

With one creative password and a simple button click, your client will be able to securely sign into the portal and view/pay their invoices with ease.

Note: If you've uploaded a custom logo in your client portal settings, this will be displayed on your portal's login page!

HTTPS:// YOUR CLIENT PORTAL

CLIENT PORTAL
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Smith & Smith Corp invited you to join their client portal, where you can pay invoices and view your payment history.

Email Address
support@bill4time.com

[Password]

[Confirm Password]

Create Your Account

By creating an account you agree to the Bill4Time Terms of Service.

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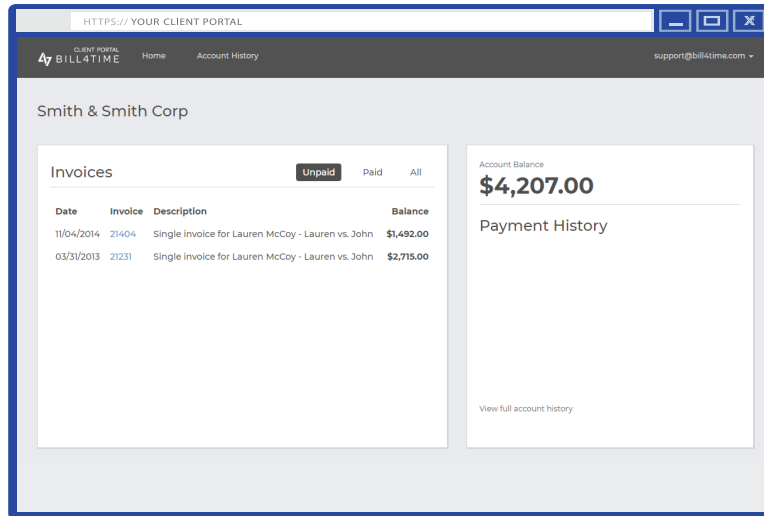
INVOICE DASHBOARD

After successfully creating an account (and logging in), your client will land on their invoices dashboard.

If you have not allowed access to see their history, only the client's unpaid invoices will be displayed on this screen.

(By default only the client's unpaid invoices will be shown. For this example, we're displaying "most recent" invoices.)
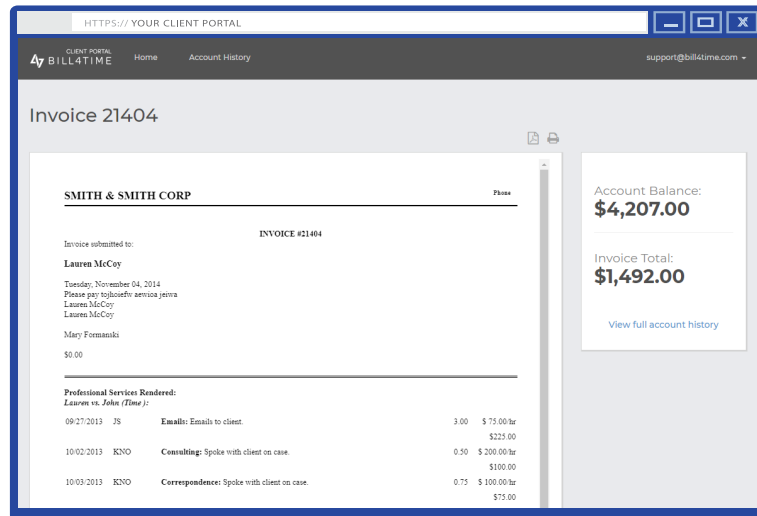
PREVIEW, PRINT, OR SAVE INVOICES

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

They can also print a copy of the invoice from this screen (by clicking on the print icon), or save a PDF file of the invoice for their records as well.

PAYMENT INFORMATION

When your client clicks the "Pay Now" button for an invoice, it will give them the option to pay either the invoice amount or their account balance overall. Alternatively, they can select "Pay other amount" and select how much they would like to pay.

After your client has selected their payment preference, they can click on the green "Continue" button and it will prompt them to enter their payment information to complete the transaction.

(Note: If these options are unvailable and they are only seeing the exact invoice amount, this is due to your "Display Calculated Invoice Amounts" setting being set to "No". You will need to change this setting to "Yes" if you'd like them to be able to choose their payment amount.)

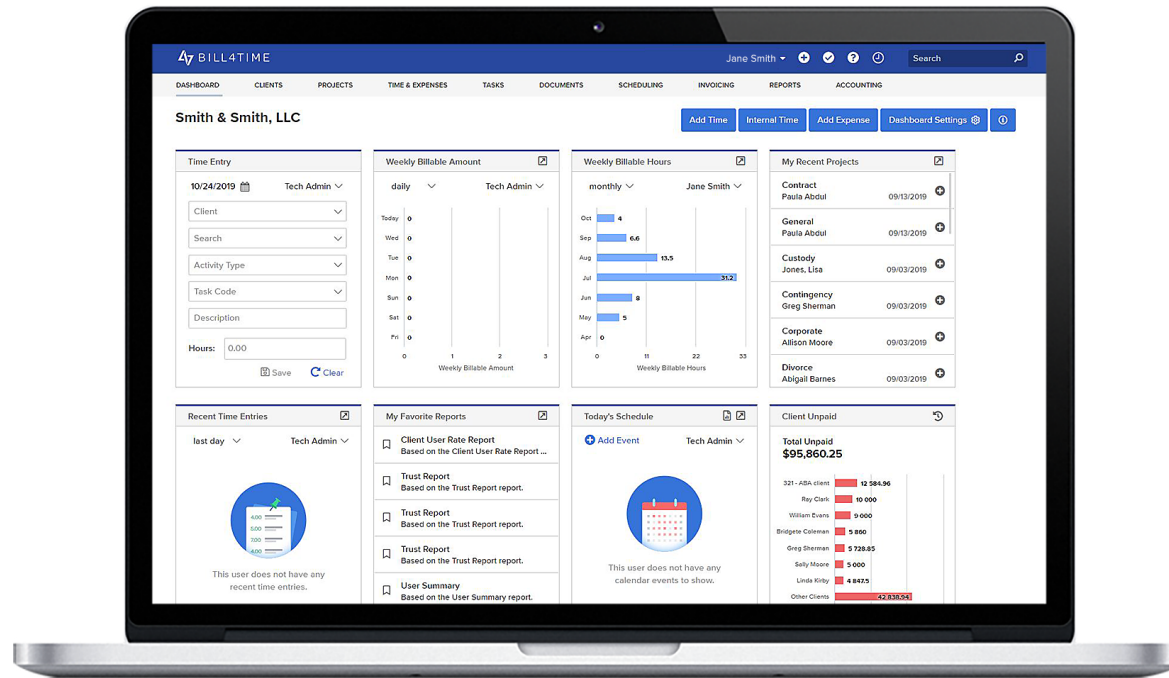## SUBMITTING PAYMENTS

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

Once the payment is submitted, it will automatically deduct from your invoice totals in Bill4Time.

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THAT'S IT!

Now that you know your client portal inside and out,
start sending those invitations!