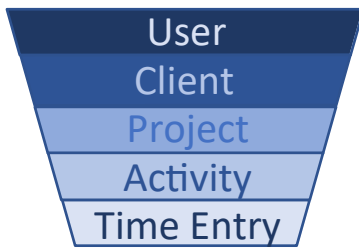


Setting/Changing Billing Rates:



Billing rates pull from the user level by default, but can be further customized on the client, project, or activity type – or overridden on individual time entries. (Note: You must have permissions to view/edit rates, in order to access these settings and make any updates.)

Rates are organized in a hierarchy: For example, changing rates on a User's profile will affect their rates for any clients, projects, and time entries they work on. However, changing their rate on a specific project, only affects that project and the entries within.

Changing a User's Billing Rate:

Changing a user's billing rate affects rates throughout the system, for just that user.

STEP 1

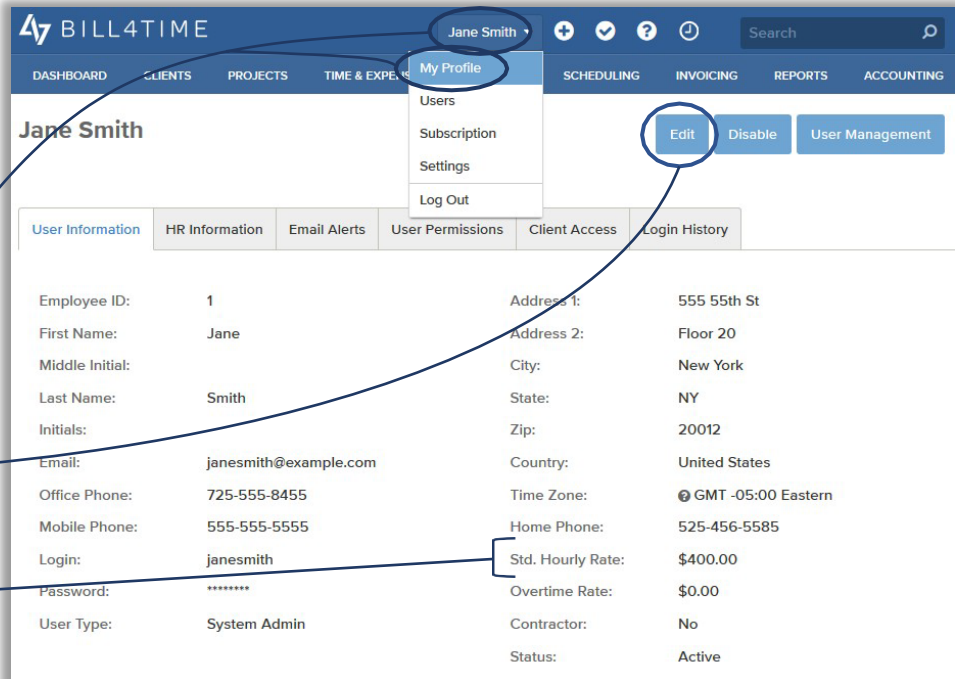
Click your name at the top right of the screen and select "Users" in this menu. Select the user to edit from this screen.

STEP 2

Click the "Edit" button within their profile.

STEP 3

Change their "Std. Hourly Rate" field and click the "Save" button.



Changing a Client Billing Rate:

Changing client's rates, will affect all projects and time entries under that client.

STEP 1

Click on the "Clients" tab across the top of your screen.

STEP 2

Search for and click on the client you'd like to edit.

STEP 3

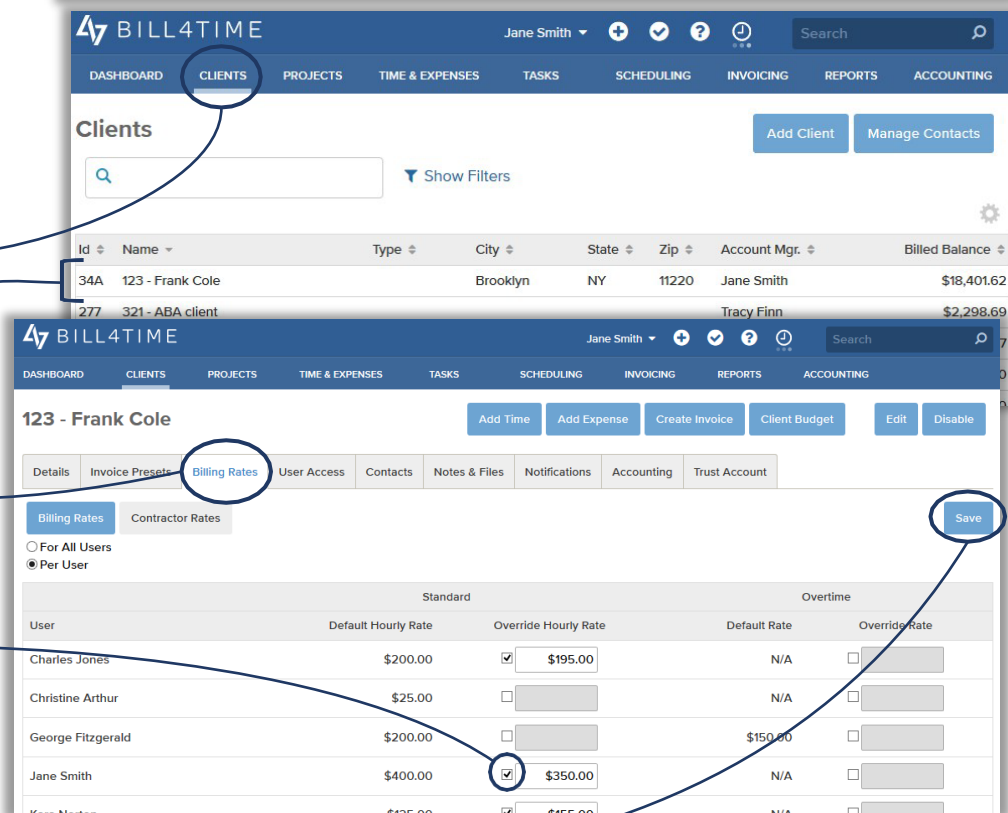
Click on the "Billing Rates" tab, within their client profile.

STEP 4

Check the box next to the user(s) you want to edit, and enter their client-specific rate in the "Override Rate" field. You'll now see their default hourly rate displayed here, as well as the overridden client rate.

STEP 5

Click the "Save" button, to update this rate.



User	Standard		Overtime	
	Default Hourly Rate	Override Hourly Rate	Default Rate	Override Rate
Charles Jones	\$200.00	<input checked="" type="checkbox"/> \$195.00	N/A	<input type="checkbox"/>
Christine Arthur	\$25.00	<input type="checkbox"/>	N/A	<input type="checkbox"/>
George Fitzgerald	\$200.00	<input type="checkbox"/>	\$150.00	<input type="checkbox"/>
Jane Smith	\$400.00	<input checked="" type="checkbox"/> \$350.00	N/A	<input type="checkbox"/>
Kara Norton	\$125.00	<input checked="" type="checkbox"/> \$155.00	N/A	<input type="checkbox"/>

Changing a *Project Billing Rate*:

Changing a project's billing rates will affect all projects and time entries under that specific project.

STEP 1

Click the Project tab from the menu. (This tab may be labeled Matter/Case instead, depending on your account's Project Mnemonic settings.)

STEP 2

Search for and click on the project you'd like to edit. Then Click on this project's "Billing Rates" tab.

STEP 3

Check the box next to each user you want to change and place their desired rate in the "Override Rate" field. (You'll see the user's default standard hourly rate displayed here as well.)

STEP 4

Click the "Save" button, to update this rate.

The first screenshot shows the 'PROJECTS' tab selected in the top navigation bar. A list of projects is displayed, with 'Family Law' selected. The second screenshot shows the 'Billing Rates' tab for the 'Family Law' project. The 'Billing Rates' tab is selected, and the 'Save' button is circled. The third screenshot shows the 'Billing Rates' tab with the 'Override Rate' field for 'Jane Smith' set to '\$325.00'.

User	Default Hourly Rate	Override Hourly Rate	Default Hourly Rate	Override Hourly Rate
Charles Jones	\$195.00	<input type="checkbox"/>	N/A	<input type="checkbox"/>
Christine Arthur	\$25.00	<input type="checkbox"/>	N/A	<input type="checkbox"/>
George Fitzgerald	\$200.00	<input type="checkbox"/>	\$150.00	<input type="checkbox"/>
Jane Smith	\$350.00	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>
Kara Norton	\$155.00	<input type="checkbox"/>	N/A	<input type="checkbox"/>

Changing *Activity Billing Rates*:

Setting up specific billable activity rates will override any user, client, and project rates within the system – for every entry of that type, regardless of which client & project it's for.

STEP 1

Click on your name in the upper right-hand corner of the screen, then click "Settings" in the dropdown menu.

STEP 2

Click on the "Custom Lists" tab.

STEP 3

Locate the "Billable Activity Types" heading and click on the blue "Edit" link.

STEP 4

Check the box next to "Rate" to enable rates per activity. Then enter in rates for these activities as needed.

STEP 5

Click the "Save" button, to update these activities and their associated rates.

The first screenshot shows the user's name 'Jane Smith' in the top right corner, with a dropdown menu open showing 'Settings' selected. The second screenshot shows the 'Settings' page with the 'Custom Lists' tab selected. The third screenshot shows the 'Billable Activity Types' table with the 'Rate' checkbox checked and the 'Consulting' activity type set to '\$125.00'.

Activity Type	Code	Rate
1040 Tax Return		\$
Admin		\$
Consulting		\$125.00
Correspondence		\$
Court		\$
Documentation		\$

Changing rates on *Time Entries*:

Manually overriding your rates on individual time entries, is the highest level of override within the system.

STEP 1

Click on Time/Expenses from the menu bar.

STEP 2

Locate and open the time entry you would like to override.

STEP 3

Check the "Override" box next to the rate field and enter your desired rate.

STEP 4

Click "Save and Close".

Bill4Time interface showing the 'Time & Expenses' section. The menu bar includes 'TIME & EXPENSES'. The dashboard displays a bar chart of hours over the past 30 days and a table of time entries for the week of July 23, 2018. The entry for Monday, 7/23, is highlighted.

Date	User	Client	Project	Private Description	Cost	Labor (hrs)	Total (hrs)
07/23/2018	Jane Smith	123 - Frank Cole	Family Law	Documentation drafted and collected for upcoming client meeting.	-	3.50	3.50
Day Total:						3.50	3.50
Week Total:						3.50	3.50

Bill4Time interface showing the 'Edit Time Entry' form. The form includes fields for Work Entry #, For User, Client, Project, Activity, Private Description, Date of Work, Start Time, End Time, Entry Type, Status, Overtime, Billable, Exclude From Invoice, Date Created, Labor Time, Rate, Travel Time, and Billable hours. The 'Override' checkbox next to the Rate field is checked, and the 'Save & Close' button is highlighted.

Field	Value
Work Entry #	26301
For User	Jane Smith
Client	123 - Frank Cole
Project	Family Law
Activity	Documentation
Private Description	Documentation drafted and collected for upcoming client meeting.
Date of Work	07/23/2018
Start Time	4:43pm
End Time	
Entry Type	Hourly Work
Status	Ready For Billing
Overtime	<input type="checkbox"/>
Billable	<input checked="" type="checkbox"/>
Exclude From Invoice	<input type="checkbox"/>
Date Created	07/23/2018
Labor Time (hrs)	3.50
Rate \$	\$325.00
Travel Time (hrs)	0.00
Billable (hrs)	3.50