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# Review: Bill4Time: Web-Based Billing and Case Management

By Caren Schwartz

## Bill4Time

[www.bill4time.com](http://www.bill4time.com)

## TechnoScore: 3.5

1 = Lowest Possible Score; 5 = Highest Possible Score

### INTRODUCTION

As professionals, we sell our time. Therefore, a billing system needs to make it easy to track time and disbursements, record payments, track client trust accounts, and create bills easily understood by clients.

The biggest benefit of using a Web-based application like Bill4Time is that you do not need to install or maintain anything. As the company adds new features or fixes items, the changes immediately become available.

Bill4Time works with Mac and PC regardless of whether you use Internet Explorer, Firefox, or Safari. All of my use and testing was done with Firefox.

As we've hopefully learned from the unfortunate events of past years, data recovery remains critical. Firms need to back up data both within the office and offsite. An online backup service protects your information when your office is not available or when a computer is stolen or damaged.

With Web-based software, you may assume you're similarly protected — but always make sure the provider maintains backups in multiple locations and that they guarantee the availability of your data.

### FEATURES

Bill4Time offers tracking of billable and non-billable time, travel time, and internal time. You can

set rates by client, by matter, or by employee. The program also includes fixed-fee billing.

Bill4Time has some case management features as well, including notes, appointments, and deadlines as well as the ability to attach files to the matter within the program. Files can be as large as 25 MB. The application integrates with QuickBooks and gives you the ability to handle receivables and payments within Bill4Time.

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In addition, Bill4Time includes a calendar in which you can schedule events and, if you have Internet access, receive reminders.

There is also a module available, at extra cost, for your BlackBerry or Treo that enables you to enter time and expenses directly on your device for instant upload to the billing system. (I did not test this module but can see its value.)

The Bill4Time Web site includes information regarding privacy and security settings as well as policies regarding backup. Overall, your data is probably

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more secure and better backed up using Bill4Time than when it is sitting on your office desktop or traveling the world on your laptop.

### **CONFIGURATION AND GENERAL USAGE**

The basic setup and use of Bill4Time is very simple. When you first open your browser and login, the program presents a "Dashboard." Here you can access all areas of the program including the place to define users, change security settings, and add clients and matters.

You can create custom lists for Matter Types, Billable Activities, Internal Activities, Expense Types, and Schedule Types. These lists are simply a series of names with no other characteristics. I would have found it helpful to have a description field that could populate my time entries with a default description.

Access permissions are set at the user level and are comprehensive, including the ability to prevent access to specific clients. However, within a given client you cannot limit access to specific matters, nor can the rights vary from client to client for a single user.

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Bill4Time uses Clients and Matters. A client may have one matter or multiple. There is one default set of rates for each timekeeper. You can change these at the client level that then filters down to the matters. When creating a matter you have the option to set a single custom hourly billing rate or to set the matter as flat fee billing. You can set clients for hourly billing, contingency billing, or flat fee billing. You can also set the billing frequency to occur regularly or at the close of a matter.

You can assign matters to an individual user responsible for the matter. Individual users can also subscribe to a matter. As a subscriber you receive email

notification every time work is done on a matter including billable time, notes, status updates, etc. In a busy firm these alerts could quickly become overwhelming — but you cannot set a limit to only receive notification for certain types of events, like notes but not time entries for instance.

### **TIME ENTRY**

Time is entered either from the matter screen or from the Time/Expenses section of the program. Under Time/Expenses you can add matter-related time or internal time or view a weekly Time Management screen. When you begin entering time you must decide in advance whether you are entering matter-related time or internal time as these are entered on different screens. For either type of time you can start a timer to track the time spent.

To bill a matter as a flat fee, set the matter as flat fee and then, from the matter screen, add a time entry. This will automatically create a flat fee time entry for the designated amount. If you create billing items from the time entry screen they will default to hourly at the client/matter assigned hourly rate. If you are tracking time on all matters regardless of flat fee or hourly, it can be easy to forget that you're billing a client on a flat fee and create additional billing items that you then have to go back and change.

Time entries include a start and stop time, but that is for information only. The start time is automatically filled in when you start a new entry but the end time is not filled in by the timer nor is the difference between start and end time used to calculate the time spent. The timer will fill in the actual labor time. There is a field to enter travel time on the same billing item with your labor time, which is convenient provided you want to bill for travel time at the same rate as labor. Time entries can be billable or non-billable. For no charge you will need to override the billing rate and make it \$0. On a billing item you also have the ability to override the billable hours entered as labor and travel. A handy box enables you to enter a reason for the override but this is for internal purposes only.

The Time Management view provides a way of seeing how much time you have entered for a week. All weeks run from Monday through Sunday. Travel

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time, labor, and totals are shown for the week and the day.

All time entries include two description boxes, detailed and summary. The summary prints on the invoice. You can click a single button to copy the detailed description to the summary but not the other way around.

### **INVOICING**

Creating invoices is a multi-step process. First you create the invoice batch. Creating an invoice batch involves choosing the clients and matters to be billed from a list, then selecting a date range and an invoice date. The batch is created and invoices are in a pre-bill state.

You can print pre-bills or review them on the screen. When in pre-bill mode, you can double click on an item and pull it up to change it, which I found very convenient. When you finish your review, you can finalize each bill after which you can print them as a batch or individually.

When all bills in the batch are finalized, the batch is automatically closed. However, you can go back to a batch and undo a bill that was previously finalized. You can view the status of invoice batches or individual invoices as well.

I found one aspect somewhat confusing. If you view invoices from the invoice search and any one of the invoices is open, they all show as pre-bill. However, if you view the batch you see the actual finalized or pre-bill status.

### **REPORTS**

There are three types of reports available — list style, calendar style, and historical. All reports can be transferred to Excel by a copy and paste process. In my tests the data came over exactly as seen on the report screen. No formulas of any type are created in Excel.

List reports show billable hours for client or employees, hours billed by client/matter, and employee expenses. Calendar reports shows employee utilization and productivity for a given month in a calendar format. Historical reports include client history and account activity.

Although I found the reports useful, more reports and more reporting options, including formatting choices, would be nice.

### **QUICKBOOKS INTEGRATION**

I tested the link to QuickBooks and found its usefulness somewhat limited. While the invoices transferred over perfectly, you are limited to one type of service and one type of expense. If you charge sales tax it cannot link to the “real” QuickBooks sales tax liability account so you will not be able to use the QuickBooks pay sales tax feature.

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Another limitation of the QuickBooks link, or any of the accounting links, is that when in use you cannot enter customer payments into Bill4Time. This means the invoices only show new activity balance and you will have to run statements from QuickBooks to reflect prior balances.

### **WISH LIST**

The most important item I would like to see in later versions of Bill4Time would be the ability to track Client Trust accounts.

### **HELP OPTIONS AND TECH SUPPORT**

Aside from short pop-up explanations on some fields there is no built-in help. However, there are several PDF manuals that you can print or view using Adobe Reader. The manuals include an “Administrative & Management Guide,” a “Users Guide,” and a “Reporting Guide.” The location of the manuals was not immediately obvious (they are located under Support>Downloads), but once found they are well written and easy to understand.

I had a few questions and one issue while testing. Technical support was responsive to phone calls and email. An issue I found with scheduling an ap-

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pointment on the calendar was fixed within a week of my reporting the problem. This is one of the many benefits of online software.

### **CONCLUSION**

Overall, if you are looking for a simple billing and calendaring solution and want the benefits of an online system, Bill4Time is a good solution. If your needs are more complex including formatting of the bill, detailed and flexible reporting, or trust accounting, Bill4Time may not suit you at this time. But take another look in the future as enhancements are added frequently.

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### **BILL4TIME'S RESPONSE**

We invited Bill4Time to respond to this Techno-Feature. Douglas Dweck responded as follows:

*Caren, thank you for taking the time to review Bill4Time. Our mobile device support now includes Pocket PC and Smartphones, in addition to the BlackBerry and Palm mentioned in your review. iPhone support will be available in July. We have added the ability to enter payments into Bill4Time and have those transferred into QuickBooks, keeping all prior balances in check.*

*As for your "Wish List," the ability to track Trust Accounts is being released this week, and will be available to our customers without any upgrade charge or need to install it, as we are a Web-based solution. This is just one of the many benefits of an online solution, as mentioned in your review.*

### **ABOUT THE AUTHOR**

Caren Schwartz is the founder of [Time & Cents Consultants](#), a Southport Connecticut firm that specializes in helping professionals select, install, and get the most out of their software. Her philosophy is that companies can save time and money when they can better manage their time and money. Caren is an Advanced Certified Professional Advisor for QuickBooks, a Certified Consultant for Timeslips by Sage, Peachtree by Sage, Amicus Attorney and Amicus Accounting by Gavel and Gown Software, as well as a Certified Independent Consultant for Time Matters, Billing Matters, Billing Matters Plus, and PCLaw by LexisNexis.

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