Tip of the Week: Simplify Payments with the TimeSolvPay Client Portal

For firms looking to streamline their billing and payment processes, the TimeSolvPay payments feature offers a robust and convenient solution. By enabling payments via the Client Portal, your clients can settle invoices directly through the portal, ensuring faster, hassle-free transactions. Here's how to set up the TimeSolvPay payment portal and make the most of this feature.

Setting Up TimeSolvPay

To begin using TimeSolvPay, follow these simple steps:

1. **Access TimeSolvPay Settings**: In your TimeSolv account, navigate to **TimeSolvPay > Settings**.
2. **Get Started**: Click the **GET STARTED** button. You'll see a screen regarding surcharges. By default, the option is set to 'No,' but you can opt for surcharging by selecting 'Yes' and continuing with the enrollment.
3. **Start Enrollment**: Check the acknowledgment box and begin enrollment.
4. **Provide Business Information**: You will be required to fill in your business details, payment method details, and signer information. Make sure to provide operating and Trust account details accurately.
5. **Submit and Wait for Approval**: Once your application is submitted, your Operating account will appear in TimeSolv, and the Trust account will be visible upon approval. Click **Refresh** to see the 'Status' change to **Active** once approved.

Enabling the Payment Portal for Your Clients

Once TimeSolvPay is active, follow these steps to enable payments through the Client Portal:

1. **Enable Payments for a Client**: Go to **Clients > Clients & Matters**, select a client, and under their **Contacts**, click **Edit**.
2. **Activate Client Portal**: If the Client Portal is not already enabled, click **Grant Access to Client Portal**. Then, check the **Enable Payments in the Client Portal** option to allow the client to make payments via the portal.
3. **Access the Client Portal**: You can log into the Client Portal directly from TimeSolv by navigating to the **Contacts > Edit** screen and clicking on **View Portal** at the bottom.

How Clients Use the TimeSolvPay Portal

Clients can pay their invoices with ease using the payment portal:

1. **Paying an Invoice**: Under the **Invoices** tab in the Client Portal, clients can select the invoice(s) they wish to pay. After verifying the payment amount in the **Payment** column, they can click the **Pay** button.
2. **Select Payment Method**: Clients can use a saved payment method or enter new payment details to complete the transaction. If you've enabled surcharging, credit card payments will incur a surcharge, but ACH and debit card payments won't.
3. **Review and Confirm Payment**: Before finalizing the payment, the portal provides a breakdown of the amount and any surcharges. Clients can review everything before clicking the **Pay** button to confirm the transaction.

With TimeSolvPay, you can offer clients a seamless and secure way to pay their invoices online. The setup is straightforward, and the system offers flexibility in payment methods and surcharging, making it a powerful tool to enhance your firm's billing efficiency.

If you're not using TimeSolvPay yet, get started today and simplify your payment collection process!