

The Top 4 Features to Look for in a Client Portal

Between billing, time tracking, and providing status updates to clients, administrative efforts take up a lot of valuable time in the workdays of attorneys and their support staff. Luckily, there's a simple way to reduce workload and make administrative processes more efficient—a client portal.

Why use a client portal?

Working with a client generates a lot of information, and unless it all has a place to go, it can quickly get unruly for both clients and attorneys. Client portals centralize information, as well as communications, [documentation](#), and even [payments](#) for your clients. And while this is absolutely a benefit to them, it can also help attorneys and staff immensely.

That's because a client portal helps you make the most of your time while staying connected to clients. It gives your clients 24/7 access to their information without requiring them to reach out—but also gives them a way to reach out if they need to. Client portals provide robust [security](#) for client communications, a feature that is crucial when exchanging information about legal matters or payments.

What to look for in a client portal

When investing in a client portal for your legal practice, there are four key elements to keep in mind: invoice history, online bill pay, trust account balance, and task status.

Feature #1: Invoice history

Have you noticed that your firm is busier than ever during tax season?

Not only do you have your own books to reckon with, but suddenly every client you worked with last year is asking you to locate important documents for them. What if each year you could shift this task off your desk entirely?

Client portals simplify document management by providing an online record of each invoice submitted and paid on every account. This allows your clients to easily review their paid invoices each year, easing the burden on your firm to provide copies each time they're requested. Instead, clients can simply print paid invoices and other sensitive data themselves.

What does this mean for you? Allowing your clients to view their invoice history whenever they want means fewer phone calls for you and your staff to respond to, giving you more time to focus on complex cases. It shows your clients that you're committed to organized, client-focused business practices, which increases their trust in your firm.

The ultimate result? You and your staff can free up time in your busy schedules while providing a service that improves your relationship with your clients.

Feature #2: Online bill pay

Today, most people pay their water bills, tax bills, and dozens of other bills online. In fact, consumers expect they can pay online for most services and goods. Why should your clients have to dig out their checkbooks to pay you for their legal work?

Not only is online bill pay convenient for your clients, it helps ensure timely payments and improves the [invoice to payment processing time](#).

Client portals allow law firms to securely accept online payments while complying with state and federal financial management requirements. But it's important to note that not all payment processing options are the same when it comes to law firms.

Using a legal-specific client portal with a legal-specific online payment option helps law firms safeguard their adherence to compliance regulations. Legal-specific tools like TimeSolv enforce strict usage and withdrawal guidelines, particularly surrounding IOLTA accounts. Accidentally withdrawing funds inappropriately from an IOLTA account can be disastrous for a well-intentioned attorney, but TimeSolv and LawPay ensure attorneys follow state protocols to protect client funds.

Online portals that offer an online bill pay feature also give clients the opportunity to schedule recurring payments, making it even easier for you to get invoices paid on time without time-consuming client follow-up.

Despite growing trends in consumer behavior, many law firms don't allow online payments. Offering online bill pay through a dedicated client portal sets your firm apart from competitors and shows clients you're willing to do what it takes to serve them well. Additionally, online bill pay guarantees timely payments, freeing up your support staff to attend to other pressing work.

Feature #3: Trust account balance

There are few things more frustrating than working on a matter all day only to realize your client's [trust account](#) is out of funds. After all, retainers are supposed to make invoicing easier on all of you—but spending time pressing clients to refill their trust accounts minimizes this valuable benefit.

Client portals allow your clients to replenish their retainers without prompting or hassle. No more time spent sending lengthy client emails explaining how you spent the retainer and requesting additional funds. If the trust account balance consistently runs low, you can even set up refill notifications when the balance hits a particular level.

Allowing clients to replenish their trust accounts online is just another way that TimeSolv's client portal for legal practices will make your life easier as an attorney.

Feature #4: Task status

With a typical workflow, your clients don't know what's been done on their case until they receive their monthly invoice . . . or they call your office requesting a status update. For many attorneys, these phone calls pile up during the day, and by the time you're able to return them, your client is frustrated, you're exhausted, and the attorney-client relationship is deteriorating.

But client portals allow clients visibility into the progress of their matters. By tracking your tasks in the client portal, your clients can see what's been done on their case whenever they want—before they even receive an invoice.

By empowering clients to view their case status themselves, you'll reduce the constant barrage of phone calls you get interrupting your train of thought, allowing you to get more work done more efficiently. You'll also improve your relationship with your clients since they'll spend less time talking to your answering machine and more time getting their questions answered.

An effective client portal allows you to focus on what's really important

With TimeSolv's easy-to-use client portal available to clients 24/7, you'll ensure your clients have the information they need to make payments on time, get status updates, and more—freeing up your time to do the work you were trained for.

When you're ready to transform the way your firm handles invoices and bills, [start a free TimeSolv trial](#).