



# ESILAW 360

# PAYMENT PROCESSING

Easily collect payments from your client through the ESILaw and Worldpay processing integration.

**PAUL FIHRER - REGIONAL SOLUTION CONSULTANT**

May 2021

# CONTENTS

- 3 OVERVIEW
- 4 LAW FIRM ONBOARDING
- 6 LAW FIRM IN-APP CREDIT CARD TRANSACTION - WITH BILL
- 12 LAW FIRM IN-APP CREDIT CARD TRANSACTION - WITHOUT BILL
- 15 TRANSACTION & BILLING MANAGEMENT

## OVERVIEW

### YOUR DYE & DURHAM ESILAW SOLUTION JUST GOT BETTER WITH INTEGRATED PAYMENT PROCESSING.

Dye & Durham is always looking for ways to help you simplify your daily operations and grow your practice. Payment processing plays an important role in this effort, and we're so pleased to partner with Worldpay from FIS to offer affordable processing built right into your Dye & Durham ESILaw platform. Now you can easily collect client payments with the ESILaw and Worldpay from FIS® credit card processing integration.

### HOW THIS CHANGE BENEFITS YOU



Allows firms to open merchant account with authorized payment gateway

- WorldPay



Allows law firms to run credit card payment via ESILAW 360

- VISA, Mastercard, AMEX (American Express), Discover, JCB, UnionPay



Allows law firms to send e-Bills with Pay Now option to accept payment from their customers (remote transaction)



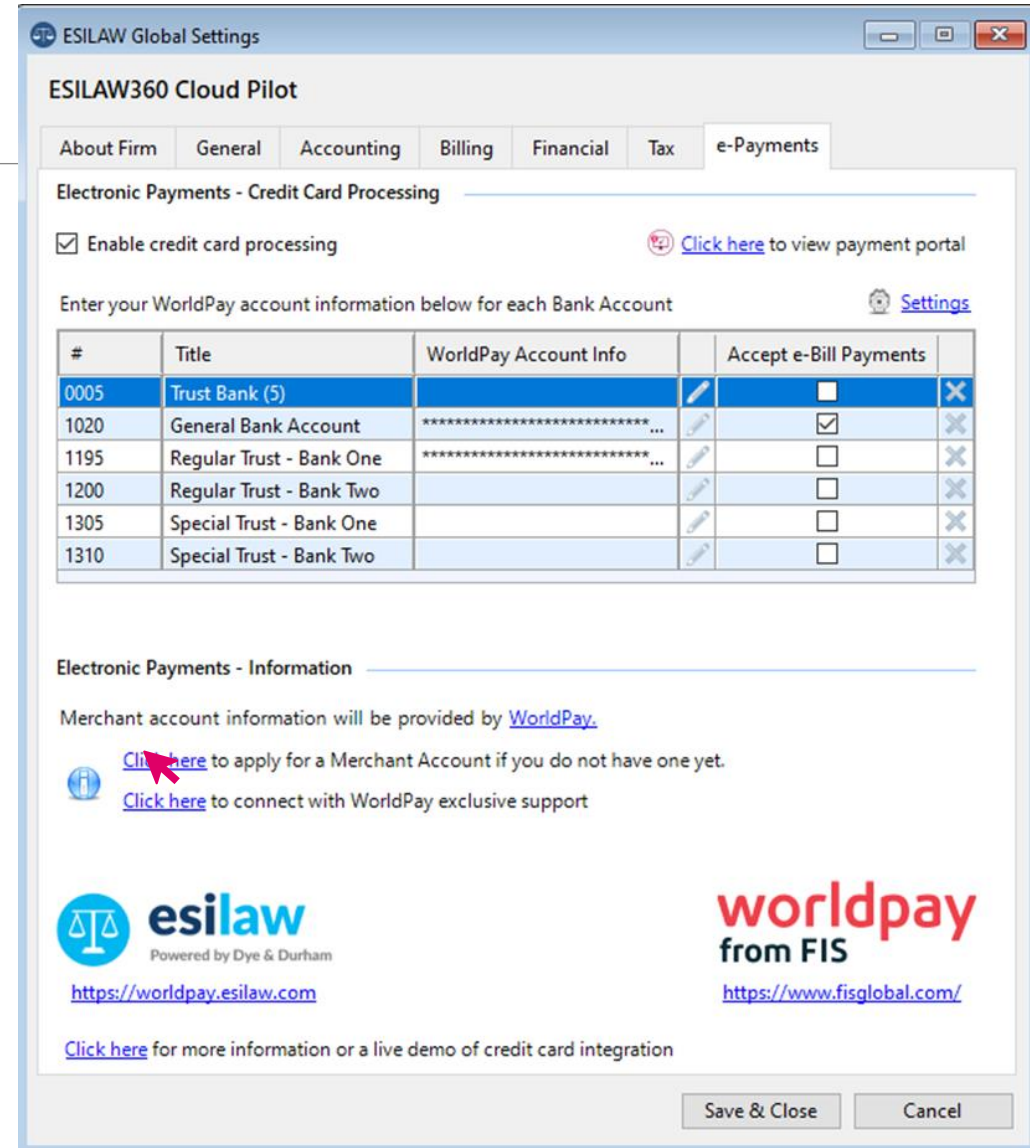
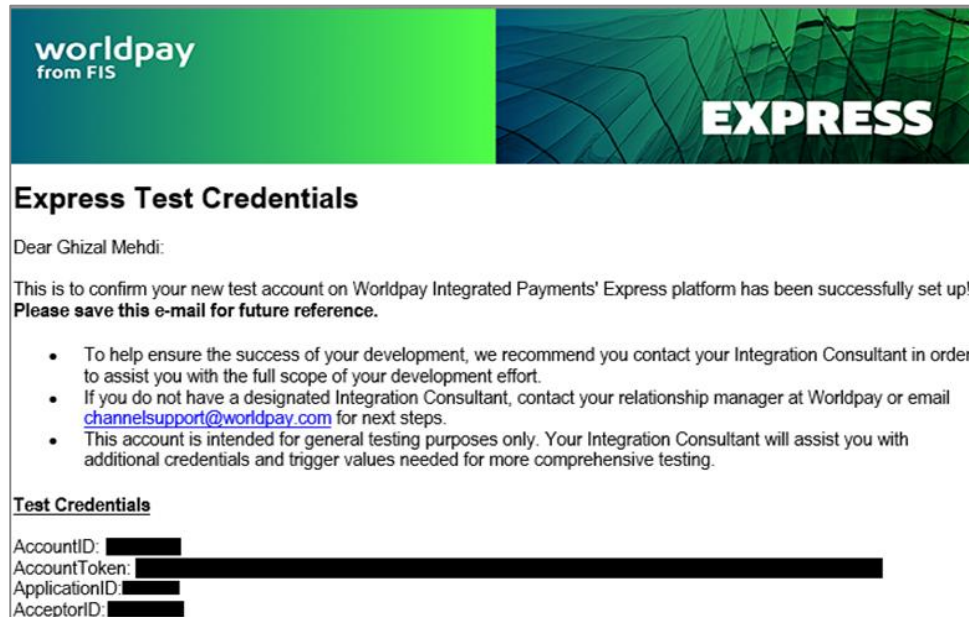
Allows law firms to view / manage their credit card transactions through Payment Gateway / Console

# LAWFIRM ONBOARDING

## FIRMS MUST OPEN A MERCHANT ACCOUNT WITH WORLDPAY.

Set-up information will be in ESILaw 360.

Under **Global Settings > e-Payments**, there will be a link to create a WorldPay merchant account (see right). Once you are set up, you will receive a confirmation email, as seen below.



**LAW FIRM IN-APP  
CREDIT CARD  
TRANSACTIONS**

**LEARN HOW TO PROCESS IN-APP  
CREDIT CARD TRANSACTIONS  
WITH AND WITHOUT BILLS.**

## LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITH BILL

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### PROCESSING AN IN-APP CREDIT CARD TRANSACTION IS EASY.

- 1 Create a bill in ESILaw 360 and send it to client via email.
- 2 The client will receive an email with the bill and will be provided the option to “pay now.”
- 3 Clicking “pay now” will open a browser window for the client to enter credit card information
- 4 After payment submission, the firm will be notified that the payment is in the firm’s bank.
- 5
  - A. If the firm is in the cloud, they will have the option to enable or disable directly updating the general ledger.
  - B. If the firm is “on-premise” they will not be able to directly update the general ledger.

# LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITH BILL

## 1 CREATE A BILL IN ESILAW 360 AND SEND IT TO CLIENT VIA EMAIL.

To: paul.fihrer@outlook.com  
 Subject: ESILAW360 Cloud Pilot - Bill

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Dear Rocky Adams,

Attached to this email is a copy of your bill.

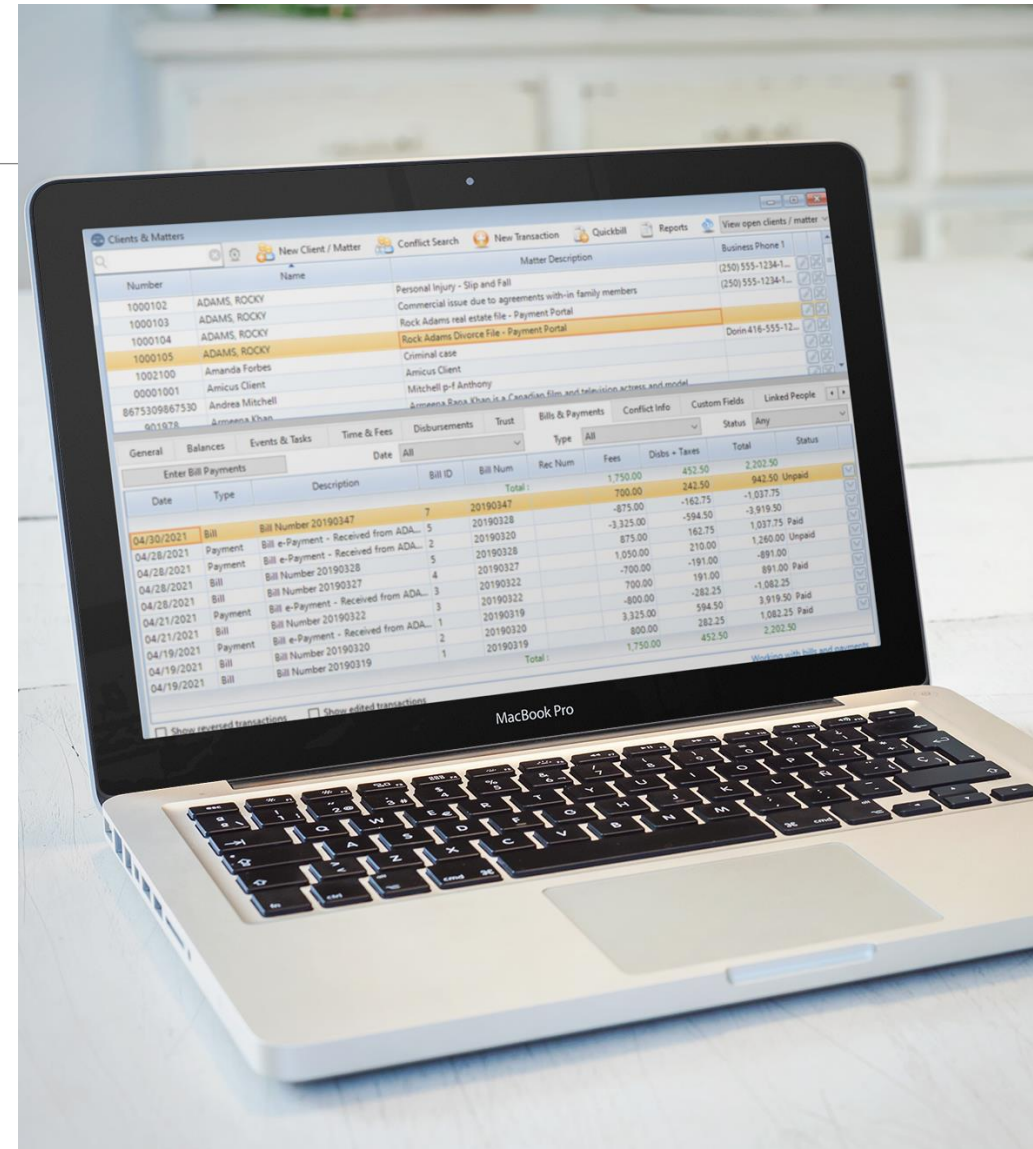
Rock Adams Divorce File - Payment Portal  
 Bill #: 20190347  
 Bill Date: 04/30/2021  
 Bill Amount: 942.50\$

To pay your bill contact our office or click the link below:  
[Pay Now](#)

Regards,

---

ESILAW360 Cloud Pilot



# LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITH BILL

## 2 THE CLIENT WILL RECEIVE AN EMAIL WITH THE BILL AND WILL BE PROVIDED THE OPTION TO “PAY NOW.”

To: paul.fuhrer@outlook.com  
 Subject: ESILAW360 Cloud Pilot - Bill

---

Dear Rocky Adams,

Attached to this email is a copy of your bill.

Rock Adams Divorce File - Payment Portal  
 Bill #: 20190347  
 Bill Date: 04/30/2021  
 Bill Amount: 942.50\$

To pay your bill contact our office or click the link below:  
[Pay Now](#)

Regards,

---

ESILAW360 Cloud Pilot

### ESILAW360 Cloud Pilot

802 W. Pender Street  
 Vancouver, BC V7P3T2  
 Tel: 555 666 7777  
 Email: info@dyedurham.com  
 Web: https://www.dyedurham.com

### ADAMS, ROCKY

19 Marpole Lane  
 Vancouver, BC V7T 2A1  
 Cell: +15145741071  
 Email: paul.fuhrer@outlook.com

Date 04/30/2021  
 File # 1000105  
 Bill # 20190347

Attention: Rocky Adams.  
 Re: Rock Adams Divorce File - Payment Portal

Date	Initials	Description of Service	Hours	Amount
04/30/2021	PF	Drafting of documents	1.00	350.00
04/30/2021	PF	Review of agreements	1.00	350.00
Total:			2.00	700.00

### TIME SUMMARY

Lawyer Name	Initials	Hours	Rate	Amount
Paul Fuhrer	PF	2.00	350.00	700.00

### TAXABLE OTHER CHARGES

Total Taxable Other Charges 0.00

### NON-TAXABLE OTHER CHARGES

Total Non-Taxable Other Charges 0.00

### TAXABLE DISBURSEMENTS

Fax 50.00  
 Courier 50.00  
 Total Taxable Disbursements 100.00

### NON-TAXABLE DISBURSEMENTS

Clerk of the Court 50.00  
 Total Non-Taxable Disbursements 50.00

Total Fees 700.00  
 Total Other Charges and Disbursements 150.00  
**TOTAL FEES, OTHER CHARGES, DISBURSEMENTS 850.00**



## LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITH BILL

### 3 CLICKING “PAY NOW” WILL OPEN A BROWSER WINDOW FOR THE CLIENT TO ENTER CREDIT CARD INFORMATION

For client convenience, they can easily pay their bill via credit card, directly out of the email, as seen below.

ESILAW360 Cloud Pilot	
Card Information	* Denotes a required field
*Card Number:	<input type="text"/>
*Expiration:	Month <input type="text"/> / Year <input type="text"/>
CVV:	<input type="text"/>
Transaction Information	
Ticket Number:	PPI-349
Reference #:	20190347
Amount:	\$942.50
Order Details	
Transaction description: Paying my bill to ESILAW360 Cloud Pilot for Bill / Invoice number 20190347	
<b>Pay</b>	

Successful payments will prompt the below message.

ESILAW360 Cloud Pilot	
<p>Thank you. Payment has been accepted successfully. Payment confirmation email has been sent.</p>	
Payment Details	
Result:	Approved
Transaction ID:	93236800
<div style="background-color: #0070C0; color: white; padding: 10px; display: flex; justify-content: space-between; align-items: center;"> <span>Payment received</span> <span style="background-color: white; color: #0070C0; border-radius: 15px; padding: 5px 15px;">\$942.50</span> </div>	

## LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITH BILL

### 4 AFTER PAYMENT SUBMISSION, THE FIRM WILL BE NOTIFIED THAT THE PAYMENT IS IN THE FIRM'S BANK.

Clients will be provided with an e-Receipt that firms will be able to view in ESILaw.

#### ESILAW360 Cloud Pilot - eReceipt

Thank you for your payment. This is a e-Receipt for your records only.

#### ESILAW360 Cloud Pilot

Attention: Accounts Payable

802 W. Pender Street Vancouver, BC V7P3T2

**Client Name:** ADAMS, ROCKY

**Invoice Number:** 20190347

**Payment Number:** 93010922

**Auth Code:** 49E32AB0CE2F48B8

#### Processing Information for Invoice # 20190328

Charge Date	Payment Method	Payment Amount	Payment Status
2021-04-30	Credit Card	\$942.50	APPROVED

#### Questions or concerns?

Contact [sales](#)

This email was sent by: **ESILAW360 Cloud Pilot**

802 W. Pender Street Vancouver, BC V7P3T2

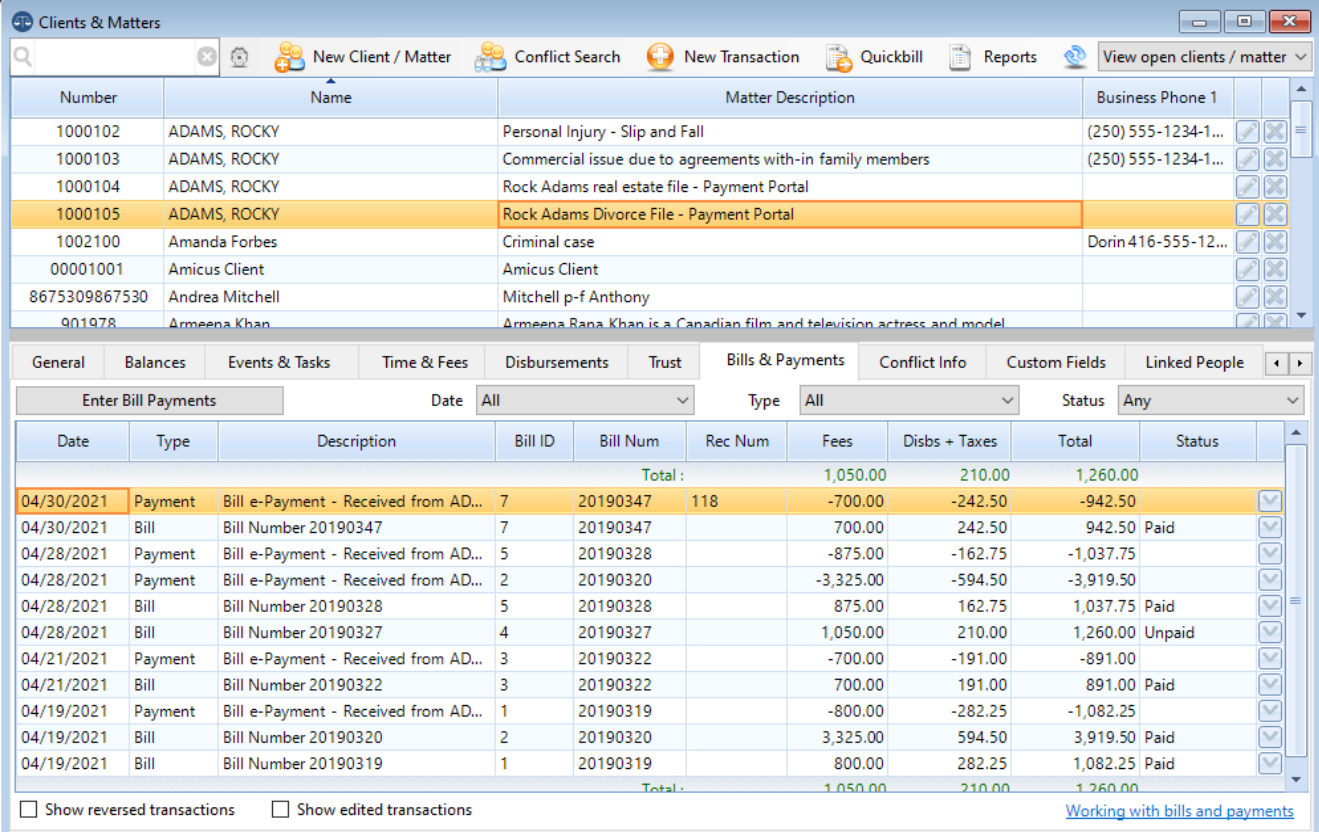
## LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITH BILL

### 5 A. IF THE FIRM IS IN THE CLOUD, THEY WILL HAVE THE OPTION TO ENABLE OR DISABLE DIRECTLY UPDATING THE GENERAL LEDGER.

This means that the status of the bill payment will automatically update in ESILaw 360.

### B. IF THE FIRM IS “ON-PREMISE” THEY WILL NOT BE ABLE TO DIRECTLY UPDATE THE GENERAL LEDGER.

This means that the status of the bill payment will not automatically update in ESILaw 360.



The screenshot shows the 'Clients & Matters' interface. The top section displays a list of matters with columns for Number, Name, Matter Description, and Business Phone 1. The matter '1000105 ADAMS, ROCKY Rock Adams Divorce File - Payment Portal' is highlighted in orange.

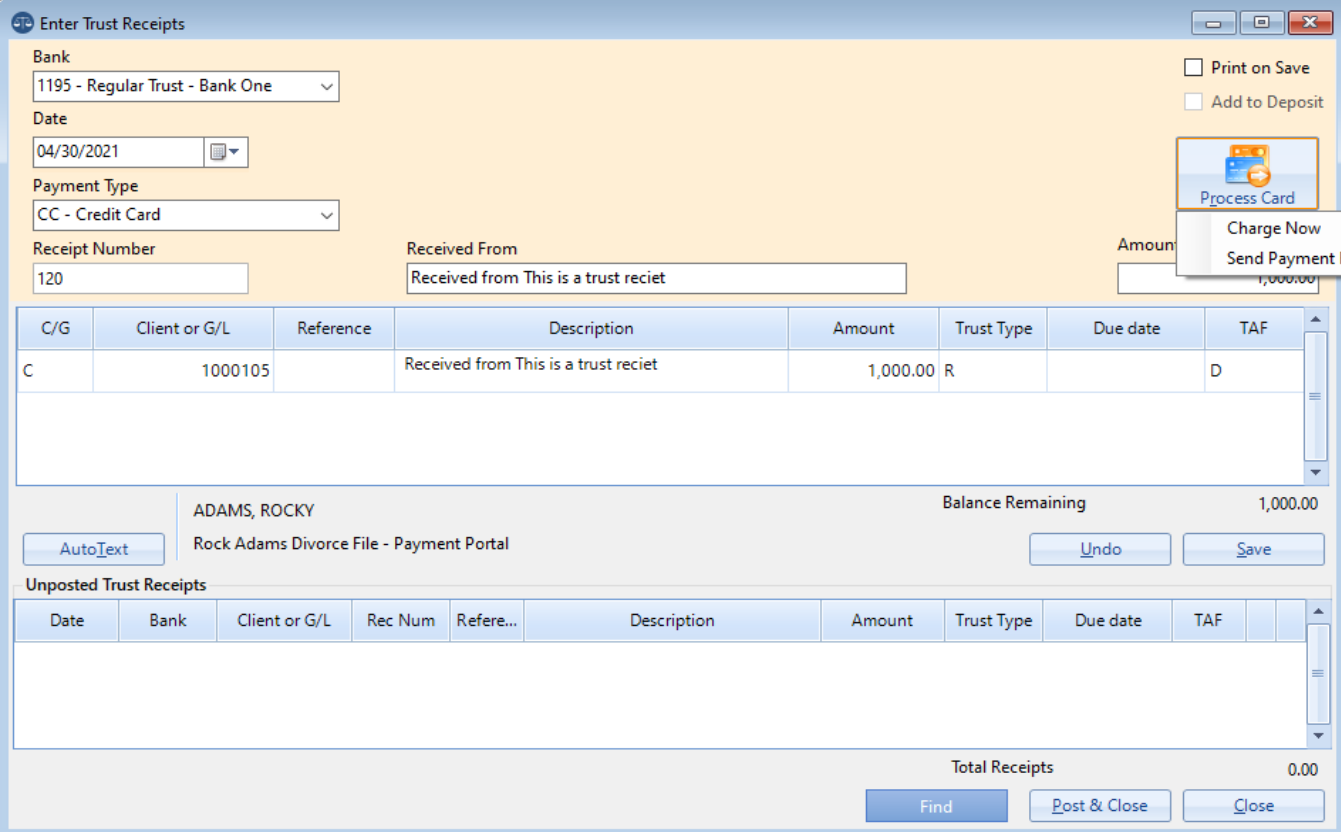
The bottom section shows the 'Bills & Payments' tab with a detailed view of bill payments. The table includes columns for Date, Type, Description, Bill ID, Bill Num, Rec Num, Fees, Disbs + Taxes, Total, and Status. The data is as follows:

Date	Type	Description	Bill ID	Bill Num	Rec Num	Fees	Disbs + Taxes	Total	Status
Total :						1,050.00	210.00	1,260.00	
04/30/2021	Payment	Bill e-Payment - Received from AD...	7	20190347	118	-700.00	-242.50	-942.50	
04/30/2021	Bill	Bill Number 20190347	7	20190347		700.00	242.50	942.50	Paid
04/28/2021	Payment	Bill e-Payment - Received from AD...	5	20190328		-875.00	-162.75	-1,037.75	
04/28/2021	Payment	Bill e-Payment - Received from AD...	2	20190320		-3,325.00	-594.50	-3,919.50	
04/28/2021	Bill	Bill Number 20190328	5	20190328		875.00	162.75	1,037.75	Paid
04/28/2021	Bill	Bill Number 20190327	4	20190327		1,050.00	210.00	1,260.00	Unpaid
04/21/2021	Payment	Bill e-Payment - Received from AD...	3	20190322		-700.00	-191.00	-891.00	
04/21/2021	Bill	Bill Number 20190322	3	20190322		700.00	191.00	891.00	Paid
04/19/2021	Payment	Bill e-Payment - Received from AD...	1	20190319		-800.00	-282.25	-1,082.25	
04/19/2021	Bill	Bill Number 20190320	2	20190320		3,325.00	594.50	3,919.50	Paid
04/19/2021	Bill	Bill Number 20190319	1	20190319		800.00	282.25	1,082.25	Paid
Total :						1,050.00	210.00	1,260.00	

# LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITHOUT BILL

## 1 B. ALLOWS USERS TO PROCESS CREDIT CARD PAYMENTS MANUALLY WITHIN ESILAW 360.

These payments are processed for trust transactions or non-bill transactions (when an invoice does not exist).



The screenshot shows the 'Enter Trust Receipts' window with the following details:

- Bank:** 1195 - Regular Trust - Bank One
- Date:** 04/30/2021
- Payment Type:** CC - Credit Card
- Receipt Number:** 120
- Received From:** Received from This is a trust reciet
- Amount:** 1,000.00

Buttons on the right include 'Print on Save', 'Add to Deposit', 'Process Card', 'Charge Now', and 'Send Payment Request (Email)'. The 'Process Card' button is highlighted with a tooltip.

C/G	Client or G/L	Reference	Description	Amount	Trust Type	Due date	TAF
C	1000105		Received from This is a trust reciet	1,000.00	R		D

Summary information at the bottom:

- ADAMS, ROCKY** | **Balance Remaining:** 1,000.00
- Rock Adams Divorce File - Payment Portal** | **Undo** | **Save**

**Unposted Trust Receipts** table:

Date	Bank	Client or G/L	Rec Num	Refere...	Description	Amount	Trust Type	Due date	TAF

**Total Receipts:** 0.00

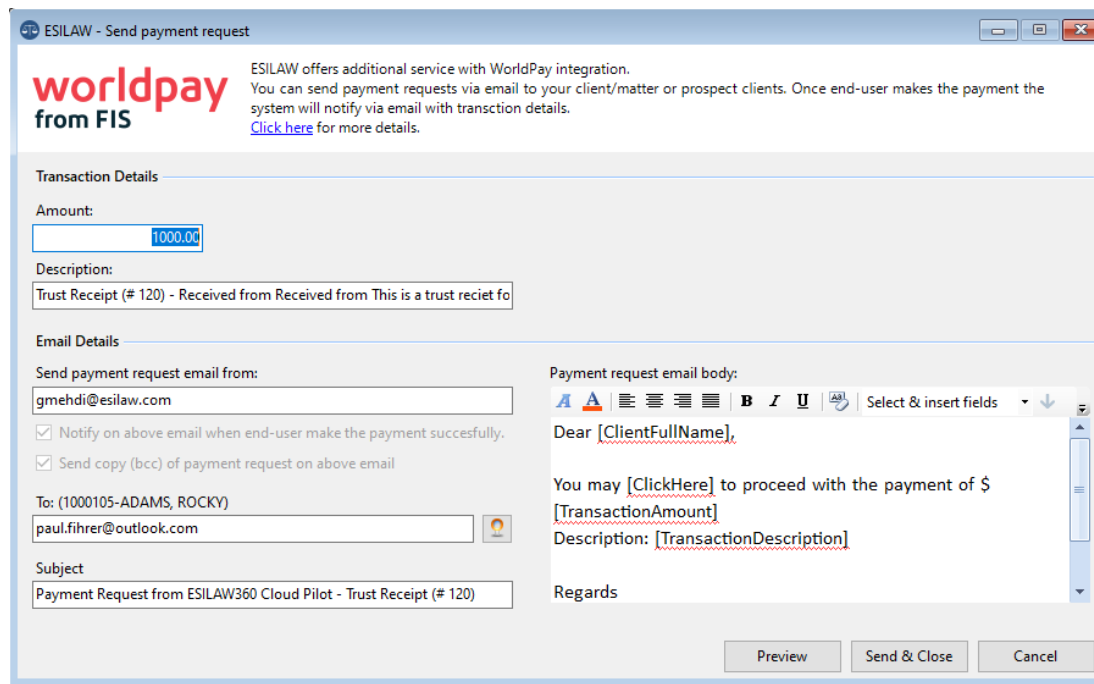
Buttons at the bottom: **Find**, **Post & Close**, **Close**

# LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITHOUT BILL

**THIS FORM GENERATES AN EMAIL WITH ALL RELEVANT TRANSACTION INFORMATION.**

Use this information to enter a one-time transaction and submit it to the client.

Take client’s credit card information over the phone or in-person based on the information from the form.



**worldpay from FIS**

ESILAW offers additional service with WorldPay integration. You can send payment requests via email to your client/matter or prospect clients. Once end-user makes the payment the system will notify via email with transaction details. [Click here](#) for more details.

**Transaction Details**

Amount:

Description: Trust Receipt (# 120) - Received from Received from This is a trust reciet fo

**Email Details**

Send payment request email from:

Notify on above email when end-user make the payment succesfully.

Send copy (bcc) of payment request on above email

To: (1000105-ADAMS, ROCKY)

Subject:

**Payment request email body:**

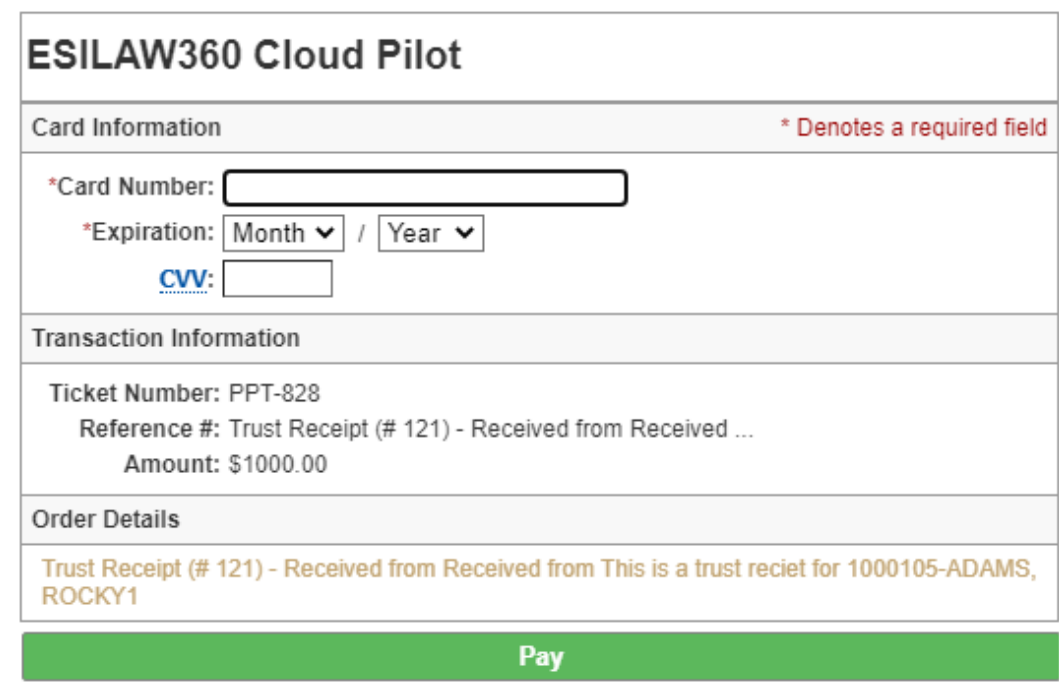
Dear [ClientFullName],

You may [ClickHere](#) to proceed with the payment of \$ [TransactionAmount]

Description: [TransactionDescription]

Regards

Buttons: Preview, Send & Close, Cancel



## ESILAW360 Cloud Pilot

**Card Information** \* Denotes a required field

\*Card Number:

\*Expiration:  /

CVV:

**Transaction Information**

Ticket Number: PPT-828

Reference #: Trust Receipt (# 121) - Received from Received ...

Amount: \$1000.00

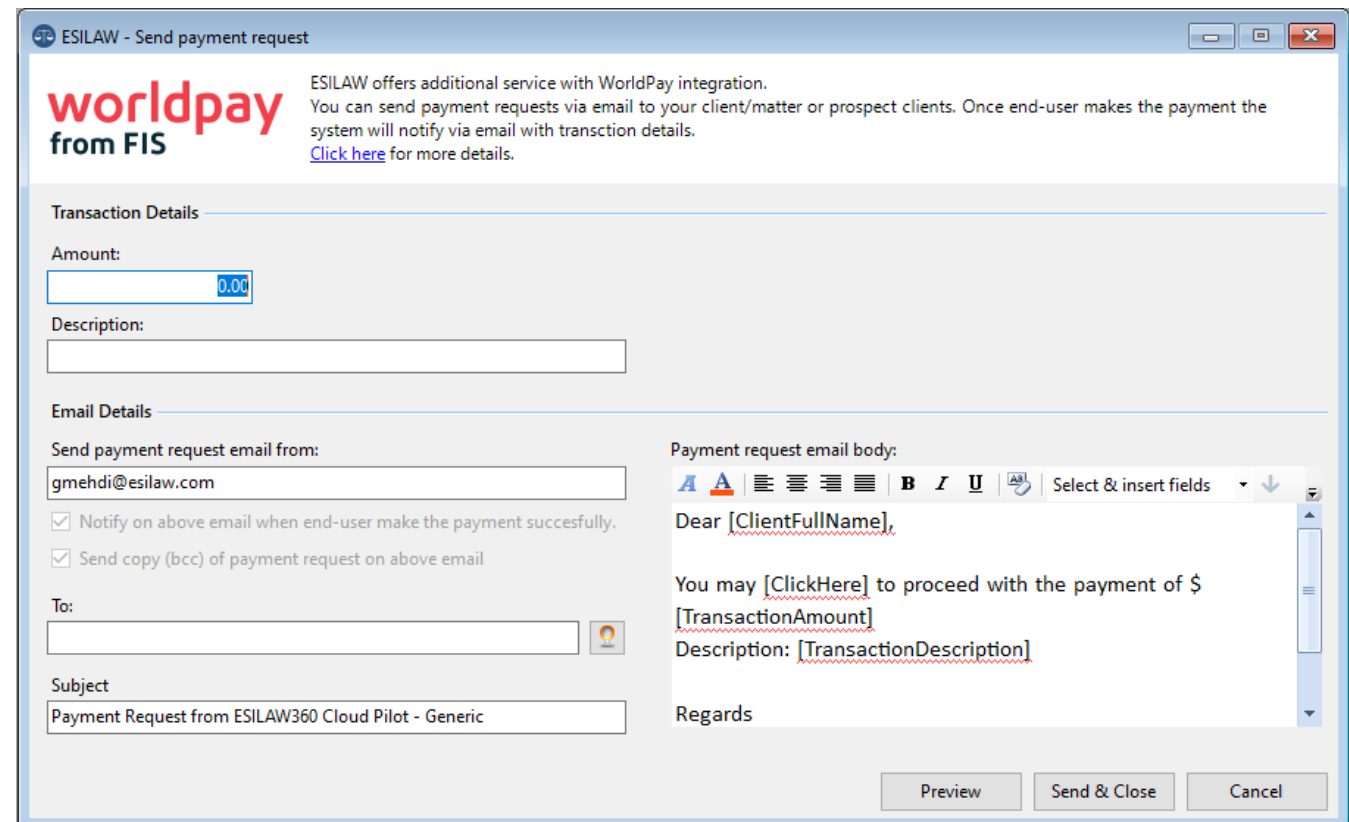
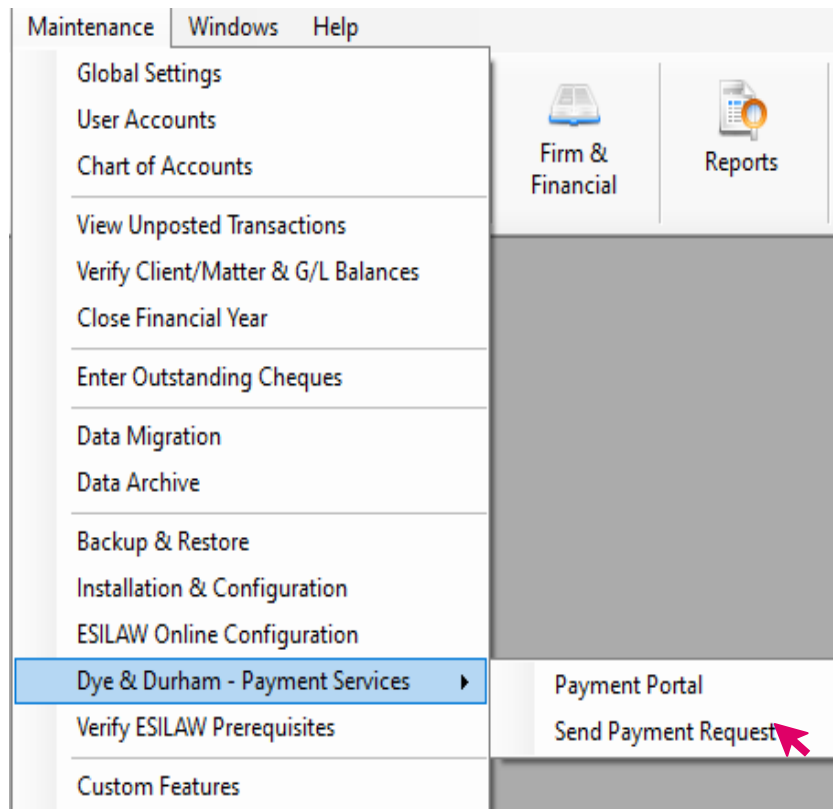
**Order Details**

Trust Receipt (# 121) - Received from Received from This is a trust reciet for 1000105-ADAMS, ROCKY1

**Pay**

# LAW FIRM IN-APP CREDIT CARD TRANSACTION – WITHOUT BILL

**ENTER ONE-TIME TRANSACTION AND SUBMIT TO CLIENT WITH  
PAYMENT REQUEST ID BLANK.**





# TRANSACTION & BILLING MANAGEMENT

## FIRMS CAN ACCESS ALL HISTORICAL TRANSACTIONS

- Reconciliation of successful transaction (between Payment Gateway Console)
- Action - Print, Download, View Receipt

ESILAW360 Cloud Pilot

 Invoices
  Settings

**5 Invoice Due**  
 You have 5 unpaid invoice(s).

**Filter by Status**

All 39


Paid 34

Pending 5

Cancelled 0


Refunded 0

**Invoices**

Date Range Last 6 months
2020-09-30 2021-04-29
Reset Search


Date ↓	Client/Matter/File #	Name	Invoice No	Reference #	Amount	Due Date	Status	Actions
2021-04-30	1000105	ADAMS, ROCKY	20190347	7	942.50 CAD	2021-05-30	Paid	Actions
2021-04-29	1001	Priyanka Nannaka	20190346	29	28.00 CAD	2021-05-29	Paid	Actions
2021-04-29	1001	Priyanka Nannaka	20190344	27	224.00 CAD	2021-05-29	Paid	Actions
2021-04-29	1001	Priyanka Nannaka	20190343	26	23.52 CAD	2021-05-29	Paid	Actions
2021-04-28	1000105	ADAMS, ROCKY	20190328	5	1037.75 CAD	2021-05-28	Paid	Actions

5
Showing 1 to 5 of 34 entries





# THANK YOU

**PAUL FIHRER**

Regional Solution Consultant

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