



Custom Invoicing

Stay on top of your bottom line
with one-click invoicing

**Make every invoice accurate, timely
and well-documented.**

BigTime's invoicing engine supports dozens of industry-standard billing scenarios and enough options to satisfy even your most exacting customer needs.

1 GIVE THE INVOICE A NAME AND DESCRIPTION

Customized PDF Style

Customized PDF Style to show clients exactly what they need to see on the

2 SETUP THE INVOICE HEADER

► ADDRESS/LOGO FIELDS APPEARANCE FOOTER

My Address

Client Address

Addit

☐ Show my logo

☒ Bill to address

☒ Sh

☒ Show my address

☒ Contact name

3 DETERMINE WHICH DETAILS THIS INVOICE WILL INCLUDE

► LINE ITEMS TIME/EXPENSES BUDGET STATUS

☐ Include line items

☐ Show line item na

Benefits Of Billing With BigTime



Flexible Billing Rates

Manage bill rates in one place with the flexibility to override as needed.



Customizable Invoice Templates

Use the invoice template editor to format invoices the way your clients want.



Time & Materials Invoices

In a few clicks automate the calculation of hours, billing rates, and expenses.



Multiple Fixed Fee Billing Formats

Manage cash flow with flexible billing formats that support incremental invoicing.



Work-In-Progress Management

Know the state of your WIP at any point in time and forecast income with confidence.



Fluid Reporting Between Accounting and PMs

Make proactive decisions based on budget statuses with two-way reporting.



Speedy Approval Workflows

Automate invoice approval notifications speed up reviews and adjustments.



BigTime Wallet for Faster Payments

Allow clients to pay invoices online, anytime, anywhere with their preferred payment methods.

INVOICING WORKFLOW

See how you can go from entered time and expenses to getting paid in 5 simple steps.

STEP 1:

Set Billing Rates

- ✓ Assign bill rates to staff, project tasks, even work codes
- ✓ Use an unlimited number of custom rates

Custom Billing Rates

If you would like to assign custom rates (per staff member, activity type or both), then use this section to do so. Custom rates will automatically apply to any unbilled WIP.

Add Rate

Copy

Staff Member/Role	Category	Task
Project Manager	Creative:Consultation	Client Proposal:Build

Close

Undo

Save Changes

STEP 2:

Create Invoice Templates

- ✓ Personalize with your logo, address, company colors, and footer
- ✓ Choose the details you need to include: time entries with notes, expenses with receipts, budget status, etc

Item/Description	Quantity	Rate
<div><div></div>Development</div>	<div>1.00</div>	<div>\$10</div>
<div><div></div>Client Proposal:Build Proposal</div>	<div>1.00</div>	<div>\$6,</div>
<div><div></div>Client Proposal:Client Meeting</div>	<div>1.00</div>	<div>\$1,</div>
<div><div></div>Implementation of Services</div>	<div>1.00</div>	<div>\$1,</div>

Add More Lines

Invoice Notes/Memo

Activity Feed

STEP 3:

Configure Custom Invoices

- ✓ Select your client and invoice style from a variety of billing formats
 - Invoice fixed fee projects at milestones or percent complete
 - Bill a percentage of the budget
 - Choose line item info. most relevant to your billing process
- ✓ Provide more or less detail on invoices with subtotal options

Project Summary

BigTime Software:Development

Work-in-Progress (-)

Time:0.00 Hours*

\$0.00*

Expenses:

\$0.00*

Pre-Billed:

\$0.00

Last Invoice

Date:

10/19/21

Amount:

\$13.00

Type:

Time & Materials (T&M)

Invoice Settings

Rate:

Staff, Rate A

1 Choose a Project

2 Choose an Invoice

3 Finalize Invoice

Pick the project you would like to invoice.

This screen will create an invoice for a single (selected) project.

If you aren't sure which project to invoice, you can use the [Work-in-Progress by Project](#) screen to see a list of total unbilled time/expenses by project.

BigTime Software:Development

Bayer U.S. LLC

Meyer

New Buffalo

BigTime Software

Development

Marketing

Product

QA

Research

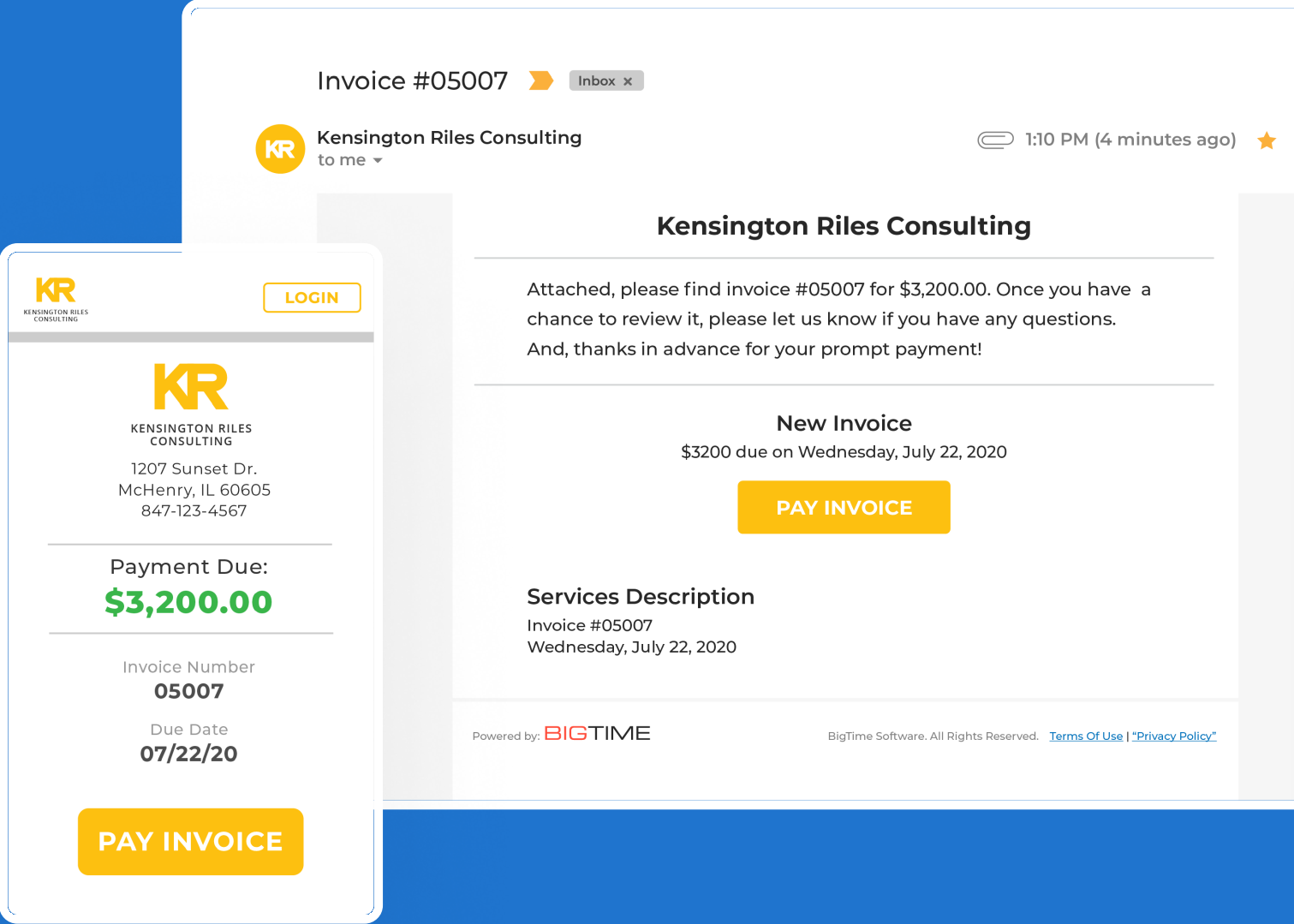
Sales

Total Amount: \$0.00

STEP 4:

Select The Option To Add Payment

- ✓ Pick your desired format for your custom payment landing page
- ✓ Check to attach a link to the invoice for clients to pay by credit card or ACH on your custom payment landing page
- 💰 Explore why our customers love accepting payments through BigTime Wallet.



STEP 5:

Review And
Send

- ✓ Make any last adjustments
- ✓ Preview the invoice PDF within BigTime
- ✓ Send out for internal approvals or email directly to the client

BLODGETT INC: PROGRAM MANAGEMENT - 000113 DRAFT DATE 1-27-20

◀ BACK TO DRAFT INVOICES


PREVIEW

INVOICE DETAIL

TIME (\$1,250.00) .

EXPENSES(\$0.00)

Time & Material ▼

BIGTIME

MPM Consulting

311 S.Wacker Dr.

Chicago, IL 60606

312-346-4646

Invoice Date:

Total Amount:

Number:

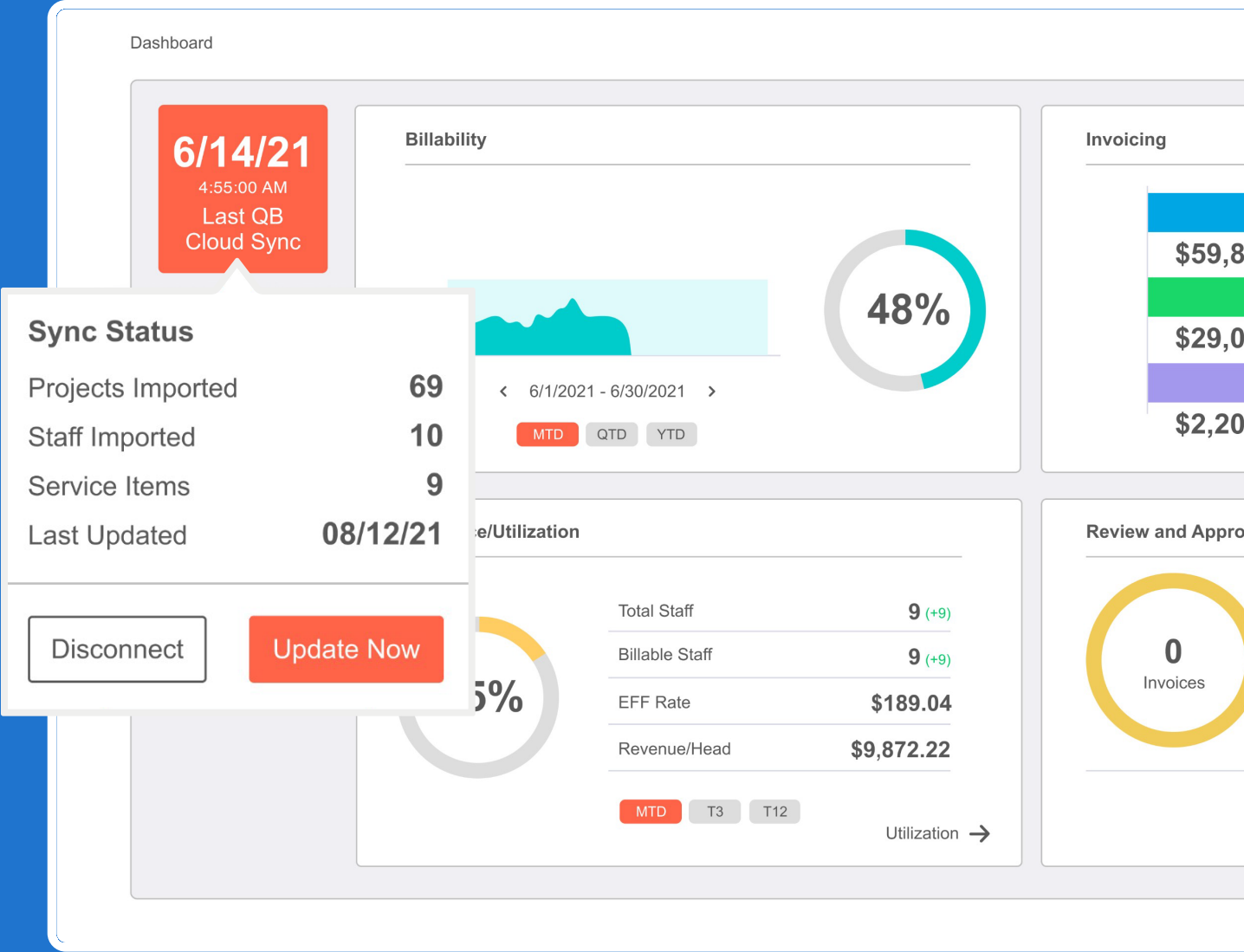
PO Number:

Terms:

STEP 6:

Sync With
QuickBooks Or
Sage Intacct

- ✓ Post invoices to your accounting software for record-keeping or further processing
- ✓ Automatically link imported codes to their QuickBooks/ Sage counterparts




Invoice Options For Every Services Firm

BigTime is built to be flexible enough for a variety of billing styles, whether you're an accountant, architect, engineer or IT-services firm.

Invoicing Template Options

- 1 Time & Material
- 2 Milestone
- 3 Fixed Fee Project
- 4 Monthly Retainer
- 5 Progress Billing

BIGTIME + QUICKBOOKS



KENSINGTON RILES
CONSULTING

Kensington Riles Consulting

1207 Sunset Dr

McHenry, IL 60605

INVOICE

Due Date:

03-02-20

Total Amount:

\$47,870.00

Number:

20-03-0865

Terms:

Due on receipt

Project Code:

20-0176

Project:

Consulting Project

Invoice Summary

Description	Total Budget	Remaining Budget		Prior Billings		This Invoice	
		%	\$	% Billed	\$ Billed	% Billed	\$ Billed
Design	\$25,000.00	--	--	11.52%	\$2,880.00	88.48%	\$22,120.00
Develop	\$50,000.00	50.0					
Test	\$15,000.00	95.0					
Deploy	\$10,000.00	100.0					
BUDGET TOTALS	\$100,000.00						
TOTAL AMOUNT DUE							



KENSINGTON RILES
CONSULTING

Kensington Riles Consulting

1207 Sunset Dr

McHenry, IL 60605

INVOICE

Due Date:

03-06-20

Total Amount:

\$5,220.00

Number:

20-03-0865

Terms:

Due on receipt

Project Code:

20-0176

Project:

Consulting Project

Invoice Summary

Description	Quantity	Rate	Description	Amount
Cooper Loveless	8.00	\$150.00	Met on-site with client	\$1,200.00
Ty Sank	14.75	\$120.00	Phase 1 completed	\$1,770.00
Kara Thrace	15.00	\$150.00	Worked on template building	\$2,250.00
TOTAL AMOUNT DUE				\$5,220.00

The iFish Group, Inc. Case Study

Learn how BigTime's invoicing made it possible for The iFish Group to get paid two weeks faster.



"The reconciliation between project financials in QuickBooks Online is way better. Invoicing out of BigTime and then directly posting it to QuickBooks allows for zero human error to be introduced."



Scott Schriber

Director of Operations,
The iFish Group, Inc.

[READ CASE STUDY](#) 

BIGTIME + QUICKBOOKS

THE IFISH GROUP, INC. CASE STUDY

How The iFish Group started getting paid two weeks earlier with BigTime



About **BigTime**

BigTime takes the guesswork out of utilization, capacity planning, and project profitability. Our awardwinning PSA software provides project planning, budgeting, time- and expense-tracking, and invoicing, all backed by uber-cool reporting and analytics.

We help accountants, architects, engineers, IT-services firms, and scientific and management consultants budget, track, and bill their most important asset: **time**.



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YOUR PROFESSIONAL
SERVICES ORGANIZATION?

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DRIVE, SUITE 2300, CHICAGO, IL 60606