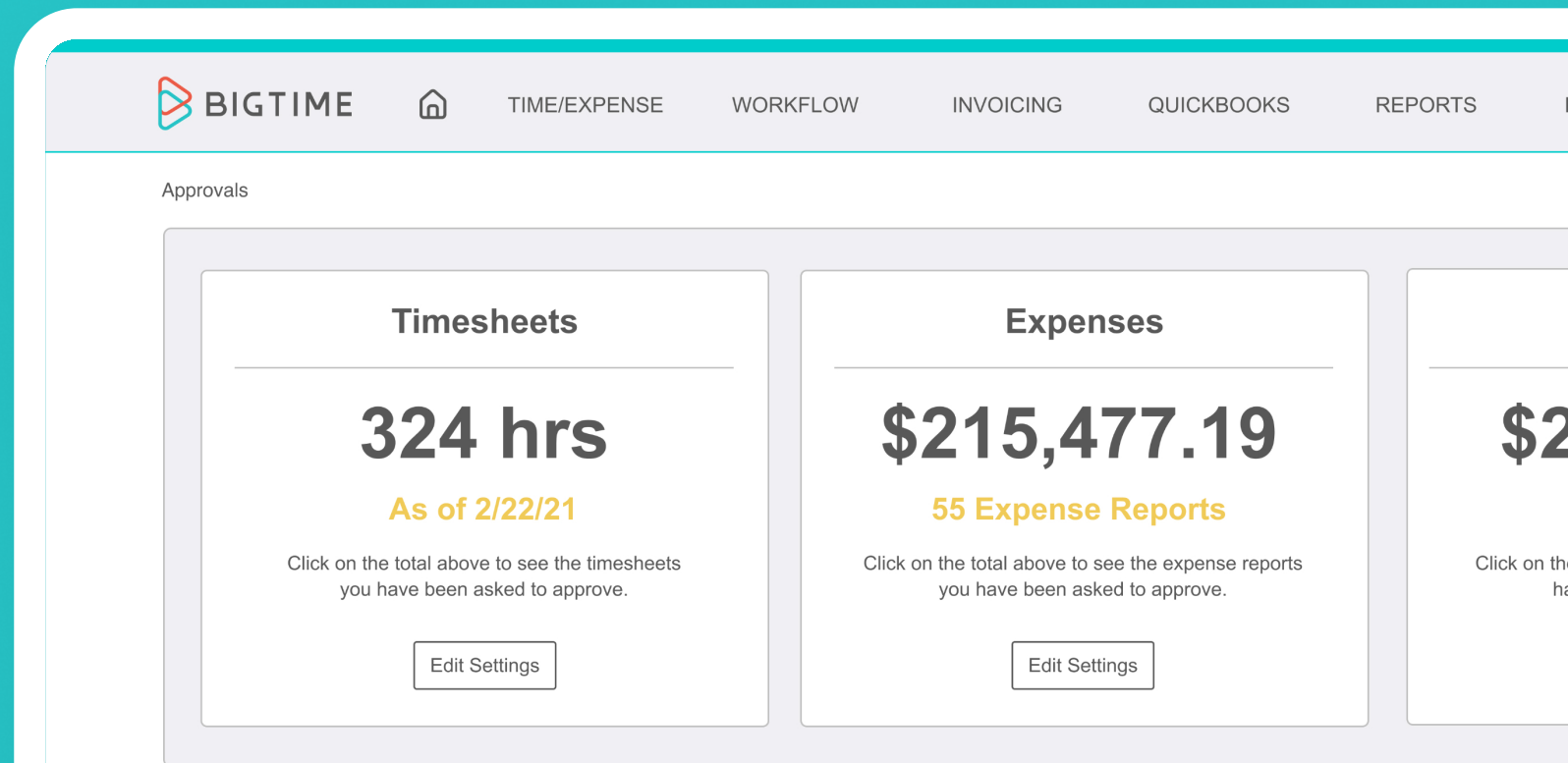


Multi-Level Approvals For Time, Expenses And Invoices

Configure and automate approval workflows to ensure a thorough review process while keeping the process quick and simple.

Control your timesheet, expense report, and invoice approval processes with easily **configurable approval workflows** with primary, secondary, and final approvers.



HOW IT WORKS: TIME & EXPENSES

Setting Approval Workflows

Both timesheets and expense reports allow up to three individuals or teams to be assigned to the approval process. Billable/non-billable approval is routed to either the team lead or the staff manager, respectively.

Timesheets

324.00 hrs

As of 2/22/21

Primary Approval

By Team Lead

Secondary Approval

By Staff Manager

Final Approval

By Financial/Admin

Simple

(none)

By Team Lead

By Staff Manager

By Billable/Non-Billable

By Financial/Admin

Departments

Creative

HOW IT WORKS: TIME & EXPENSES

Approval Process

To ensure a quick approval process, **notifications alert approvers when they have entries** in their queue.. While system admins are able to see everything, other approvers are only shown the entries they need to take action on.

Using bulk actions, approvers can save time by approving multiple time or expense entries at once.

Client Approvals | Review/Approve Timesheets

Back to Dashboard

Bulk Actions

Timesheet Period	Total	Unapproved	Action
McDonald			
02/08/21 - 02/14/21	4.00 Hours	4.00 Hours	<div>ApproveReject</div>
Michigan Ave			
02/22/21 - 02/28/21	40.00 Hours	40.00 Hours	<div>ApproveReject</div>
Rocky Mountain			
02/22/21 - 02/28/21	80.00 Hours	80.00 Hours	<div>ApproveReject</div>
Jane Doe (secondary approval)			
02/22/21 - 02/28/21	4.00 Hours	4.00 Hours	<div>ApproveReject</div>
02/08/21 - 02/14/21	13.00 Hours	13.00 Hours	<div>ApproveReject</div>
Mary Pat Holtrop (secondary approval)			
02/22/21 - 02/28/21	48.00 Hours	8.00 Hours	<div>ApproveReject</div>
02/15/21 - 02/21/21	48.00 Hours	48.00 Hours	<div>ApproveReject</div>
02/08/21 - 02/14/21	29.00 Hours	25.00 Hours	<div>ApproveReject</div>
Matt McCahill (final approval)			
02/22/21 - 02/28/21	40.00 Hours	40.00 Hours	<div>ApproveReject</div>

HOW IT WORKS: TIME & EXPENSES

Approval Detail

The timesheet and expense report detail pages can be configured to **include the fields that are most important to your business**, pulling information directly from the entries and displaying it all in one place.

If one approver rejects an entry, the entire approval process will start over once the entry is adjusted and resubmitted,

Mary Pat Holtrop - 2/22/21 thru 2/28/21

Back to Timesheet Approvals

ApproveReject

<input type="checkbox"/> Project	Approval Level	Labor Code	Date	Hrs Input	Status	N/C	Notes
Primary (2)							
Wasco Elementary	Primary	Consulting	2/26/21	3.00	Under Review		
Wasco Elementary	Primary	Consulting	2/27/21	3.00	Under Review		
Primary				6.00			
Secondary (1)							
Rocky Montain	Secondary	Project Management	2/27/21	5.00	Under Review		
Primary				5.00			
Final (3)							
<input type="checkbox"/> Rocky Montain	Final	Design	2/23/21	8.00	Under Review		
<input checked="" type="checkbox"/> Rocky Montain	Final	Design	2/24/21	8.00	Under Review		
<input checked="" type="checkbox"/> Rocky Montain	Final	Project Management	2/25/21	8.00	Under Review		
Final				24.00			
Approved (1)							
Rocky Montain	Approved	Project Management	2/26/21	5.00	Approved		
Approved				5.00			
Overall Totals				40.00			

4

HOW IT WORKS: INVOICES

Setting Approval Workflows

Multi-level approvals allows for **up to four levels** of invoice approvers (compared to standard invoice approvals which allows for up to two). Team lead and financial/admin are the only simple approver options for invoices.

If needed, higher-level approvers can **leap-frog over lower level approvers**, speeding up the entire process. If leap-frogging is not enabled, higher level approvers can still approve invoices before lower level approvers, but everyone will still need to approve the invoice.

Invoices

\$26,760.00

5 Invoices

Primary Approval

By Team Lead

Secondary Approval

Holtrop, Mary Pat

Tertiary Approval

By Financial/Admin

Final Approval

(none)

Simple

(none)

By Team Lead

By Financial/Admin

HOW IT WORKS: TIME & EXPENSES

Approval Process

Approvers can **add a note to an invoice** when they reject it or send it to the next approver, so users or subsequent approvers know what to look at. When a previously rejected invoice is sent back to review, it speeds up the process by skipping over previous approvers and going directly to the approver that rejected it.

Website Redesign Draft Date 2/26/21

[Back to Draft Invoices](#)

Preview

Invoice Detail

Time (\$0.00)

Expenses (\$0.00)

Invoice Line Items

Snapshot

Holtrop & Associates

311 S. Wacker Drive
Chicago, Illinois 60606
312.346.4646

Record Breakers Group

Invoice

Invoice Date: 02/26/21
Number: 02457
Amount: \$9,000.00
Terms: Net 15
Job ID: 000064

Invoice Details

Description	Amount
Consulting	\$3,000.00
Design and Development	\$6,000.00
TOTAL AMOUNT DUE	\$9,000.00

Invoice Snapshots

< Current

Additional Documents

Statement of Work

Add Document

Review/Approval Status

JSmith (Team Leads)
2/126/21

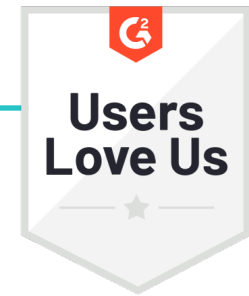
Mary Pat Holtrop
2/26/21

Financial Admin
2/26/21

Recreate

Cancel

Save Changes



Tanya C

Financial Controller | Accounting | Small-Business (50 or fewer emp.)

Validated Reviewer ✓

Verified Current User ✓

Review Source: Invitation from G2 on behalf of the seller ✓



“Streamline Your Timekeeping And Expense Processes”

What do you like best?

For a project based industry, this software supplies electronic timesheets, multi-level approvals and seamless sync with Quickbooks. BigTime uses these approved items to create client invoices within the software.

What do you dislike?

Would be helpful to be able to customize some of the default status fields.

What problems are you solving with the product?

Our billable hours and expenses are more accurate due to multi-level approvals. Invoicing from BigTime is a huge benefit and has decreased the errors and time needed for issuance of client invoices.

About BigTime

©2020 BIGTIME SOFTWARE

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.

Multi-level approvals are available for Premier customers.

Contact us at sales@bigtime.net for more information on multi-level approvals including user rights, filtering, reporting, or related activities such as invoice generation and submission.

[REQUEST PRODUCT TOUR](#) >



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