

BIGTIME 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 their invoice.

2 SETUP THE INVOICE HEADER

ADDRESS/LOGO FIELDS APPEARANCE FOOTER(S)

My Address Client Address

Show my logo Bill to address

Show my address Contact name

Show overall note

3 DETERMINE WHICH DETAILS THIS INVOICE WILL INCLUDE

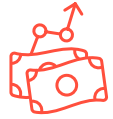
LINE ITEMS TIME/EXPENSES BUDGET STATUS RECEIPTS

Include line items Show line item name

Show quantity/rate Show line item note

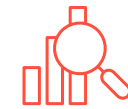
Show both name+note

BENEFITS OF BILLING WITH BIGTIME



Flexible Billing Rates

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



Work-In-Progress Management

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



Customizable Invoice Templates

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



Fluid Reporting Between Accounting and PMs

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



Time & Materials Invoices

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



Speedy Approval Workflows

Automate invoice approval notifications speed up reviews and adjustments.



Multiple Fixed Fee Billing Formats

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



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. Adjusting these rates will automatically apply to any unbilled WIP.

Staff Member/Role	Category	Task	Rate	
<input type="text" value="Project Manager"/>	<input type="text" value="Creative:Consultation"/>	<input type="text" value="Client Proposal:Build Proposal"/>	\$250.00	<input type="button" value="🗑"/>

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	Amount ▼	
⋮ Development	1.00	\$10,000.00	\$10,000.00	
⋮ Client Proposal:Build Proposal	1.00	\$6,000.00	\$6,000.00	
⋮ Client Proposal:Client Meeting	1.00	\$1,600.00	\$1,600.00	
⋮ Implementation of Services	1.00	\$1,600.00	\$1,600.00	

Invoice Notes/Memo

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

Back Cancel Next Step

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.

The image shows a screenshot of an email and a mobile payment landing page. The email is from Kensington Riles Consulting, dated 1:10 PM (4 minutes ago). The subject is "Invoice #05007". The email body contains the following text: "Attached, please find invoice #05007 for \$3,200.00. Once you have a chance to review it, please let us know if you have any questions. And, thanks in advance for your prompt payment!". Below the text is a "New Invoice" section with the amount "\$3200 due on Wednesday, July 22, 2020" and a yellow "PAY INVOICE" button. The "Services Description" section lists "Invoice #05007" and "Wednesday, July 22, 2020". The footer of the email mentions "Powered by: BIGTIME" and "BigTime Software. All Rights Reserved. Terms Of Use | Privacy Policy".

The mobile payment landing page is for Kensington Riles Consulting. It features the company logo, a "LOGIN" button, and the following information: "KENSINGTON RILES CONSULTING", "1207 Sunset Dr. McHenry, IL 60605", "847-123-4567". The "Payment Due" section shows "\$3,200.00" in green. Below this, it lists "Invoice Number 05007" and "Due Date 07/22/20". A yellow "PAY INVOICE" button is at the bottom.

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 ▼ **Snapshot**



MPM Consulting
311 S. Wacker Dr.
Chicago, IL 60606
312-346-4646

INVOICE
Invoice Date: 01-27-20
Total Amount: \$1,250.00
Number: 20-01-0156
PO Number: 5156414512
Terms: Due on receipt

INVOICE SNAPSHOTS
◀ Current

ADDITIONAL DOCUMENTS
+ Add Document

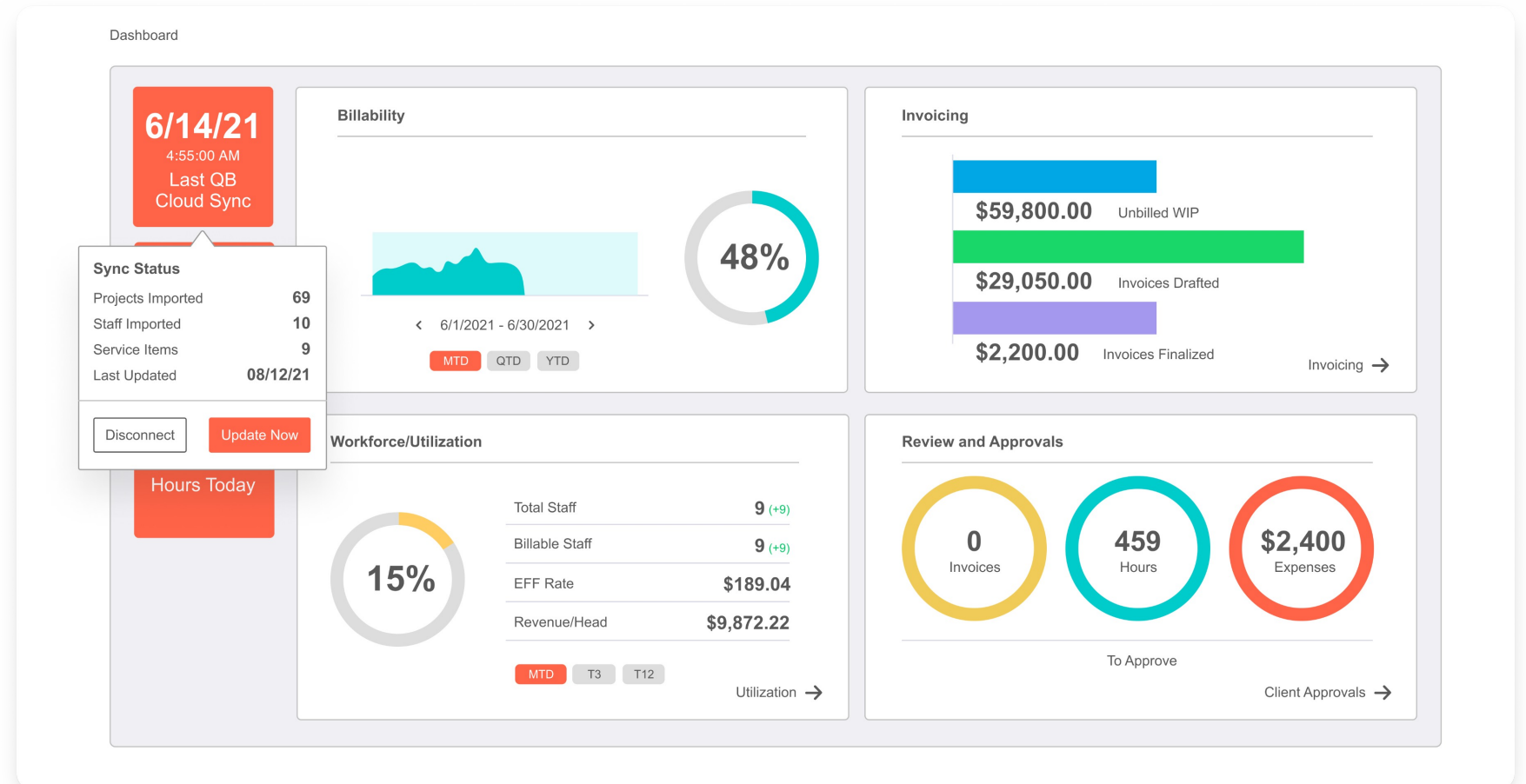
REVIEW/APPROVAL STATUS
+ Forward to Review

Note to Reviewer...

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.



Kensington Riles Consulting
1207 Sunset Dr
McHenry, IL 60605

INVOICE


Due Date: 03-06-20
Total Amount: \$5,220.00
Number: 20-03-0863
Terms: Due on receipt
Project Code: 20-0176
Project: Consulting Project

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	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



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

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	50.00%	\$25,000.00	--	--	50.00%	\$25,000.00
Test	\$15,000.00	95.00%	\$14,250.00	--	--	5.00%	\$750.00
Deploy	\$10,000.00	100.00%	\$10,000.00	--	--	--	--
BUDGET TOTALS	\$100,000.00		\$49,250.00		\$2,880.00		\$47,870.00
TOTAL AMOUNT DUE							\$47,870.00

INVOICING TEMPLATE OPTIONS

Time & Material | Milestone | Fixed Fee Project | Monthly Retainer | Progress Billing

THE IFISH GROUP CASE STUDY

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

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



 **BIGTIME** | The iFish Group, Inc. Case Study

“
The reconciliation between project financials in QBO 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](#)

ABOUT BIGTIME

BigTime takes the guesswork out of utilization, capacity planning, and project profitability. Our award-winning 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.

Looking to power up your professional services organization?

Click the button below to request a
personalized demo

[REQUEST PRODUCT TOUR](#)



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