

Smarter Project Delivery Starts With Integrated Systems

Optimizing Efficiency with PSA,
CRM, and Accounting Software



Oftentimes, professional services businesses fail to see the ways in which their systems are working against their project delivery, creating the very downsides to project management they strive to avoid.

This is where integrated systems come in. When you integrate your Customer Relationship Management (CRM), Professional Services Automation (PSA), and Accounting systems, you're setting your organization up for successful, smoother, and repeatable project delivery so you can focus on growing your business.



Customer Relationship Management (CRM)
tools support interactions with customers and prospects



Professional Services Automation (PSA)
tools streamline time tracking, billing and invoicing, and project and task management



Accounting systems process transactions and organize financial information

Benefits Of Integrating CRM, Accounting, And PSA Software



Seamless data flow

See a smooth exchange of data between your CRM, PSA, and Accounting software, eliminating the need for manual data entry and reducing errors.



Scalability and growth

Integrated systems provide a foundation for scalability, allowing your organization to efficiently manage increasing customer demands, project complexities, and financial growth.



Streamlined financial processes

Have simplified financial processes such as invoicing, expense management, and financial reporting, ensuring accurate and timely financial data.



Data consistency

Experience data consistency across departments that minimizes discrepancies and enhances data accuracy and reliability.



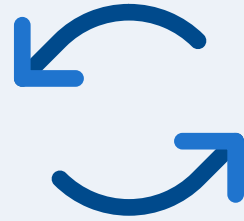
Improved resource management

Get real-time access to resource availability to improve resource allocation and enhance your organization's project planning capabilities.



Comprehensive customer insights

See a holistic view of customer interactions, preferences, and project requirements that enables you to provide personalized and efficient customer management.



CONNECT WORKFLOWS

Throughout the Project Lifecycle to
Increase Visibility

Stage 1 : Kick-Off Projects Faster

CRM + PSA Software

- ✓ Trigger projects to be automatically created in BigTime once they reach a certain lifecycle stage in your CRM.
- ✓ Add details to a project in BigTime and sync them to your opportunity in your CRM.
- ✓ Define the project scope better based on the available resources shown in BigTime.
- ✓ Leverage BigTime's intuitive reporting to see project forecasts enriched with your CRM data.

The screenshot displays the BigTime software interface. On the left, a list of projects is shown with details such as Name, Client, and Project Type. The 'Development' project for Stark Industries is highlighted. On the right, the details for the 'Stark Industries: Development' project are shown, including Name, ID, Display As., Budget Style, Type, Category, and Current Status. A 'Billing/Realization To Date' summary is overlaid on the bottom right, showing a donut chart with 11% completion, Total Input of \$83,480.60, and Invoiced amount of \$9,015.60.

Name	Client	Financials	Team
Initial Design/Build Augustana College:Initial Des...			
Marketing BigTime Software:Marketing			
Anderson City of Chicago:Anderson			
Mascow ABC Company:Mascow			
Development Stark Industries: Development			
Michigan Avenue City of Chicago:Michigan Aven...			
Bailey CT Foundation:Bailey			

Project Client Financials Team

Stark Industries: Development

Name ID

Development 000003

Display As..

Development

Budget Style Type Category

Standard (By Task) ▾

Allow everyone to bill time/exp

Current Status

Active

Billing/Realization To Date

11%

Total Input
\$83,480.60

Invoiced
\$9,015.60

Stage 2: Strategically Assemble Strong Project Teams

PSA Software

- ✓ Allocate resources based on skills, experience, and availability to increase billable hours and profitability.
- ✓ Forecast resource demand with precision based on project pipeline and business strategy.
- ✓ Account for PTO and global holidays when allocating tasks to resources.

Basic Info User Rights Contact Info **Skills** Time Expenses Activity Team

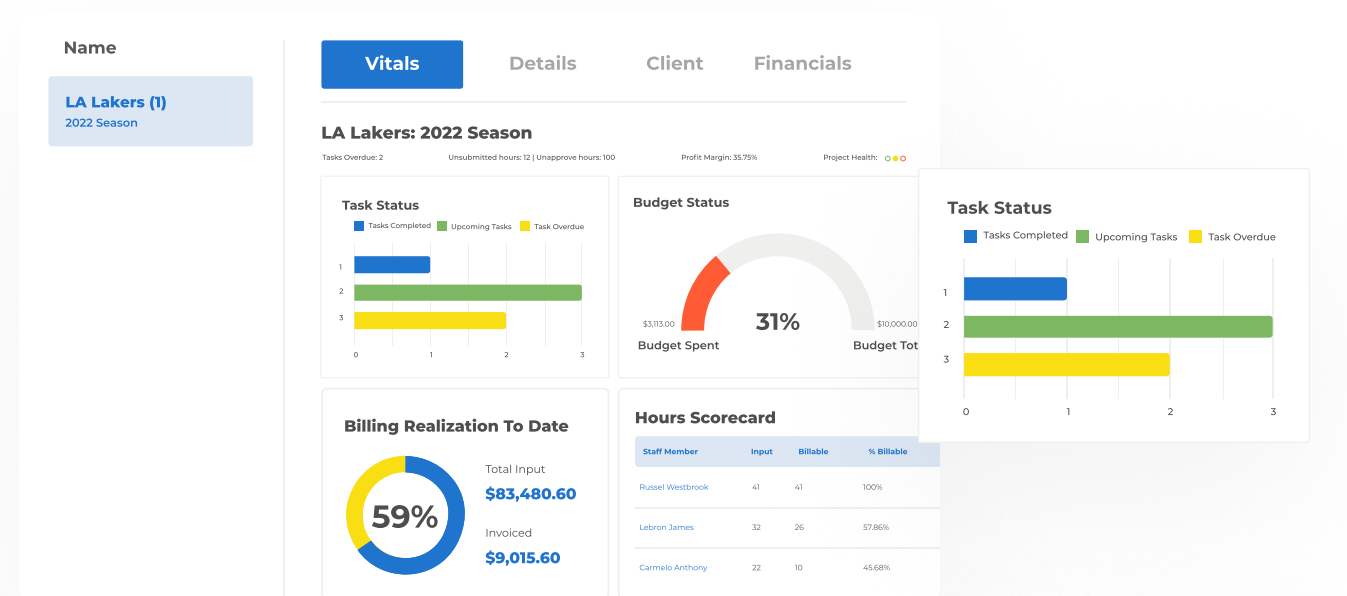
Skill Name	Industry	Category	Type	Rating	Added	Expire Date	File
Mary Pat Holtrop View Skill Cards Add Multip...							
Data Analysis	Architectural	Analysis	Skill	★★★★★	10/21		
Project Manage...	Architectural	Management	Skill	★★★★☆	10/28		
Survey Operato...	Civil	Operations	Skill	★★★★☆	10/29		
Blueprint Creat...	Civil	Technical	Skill	★★★★☆	10/30		

Undo Close **Save Cha**

Stage 3: Monitor Progress & Budget In Real-Time

CRM + PSA Software

- ✓ Coordinate budgets, schedules, and project scopes for accurate project oversight.
- ✓ Set up tasks for each project and assign hourly, fee, and expense budgets to track compared to actuals.
- ✓ Arm your client-facing team with more project details than ever before, by pulling up-to-date budget reports into your CRM.



Report Opportunities

Allocations+Actuals by Month

For opportunities that have BigTime projects attached, this report shows projected revenues in a pivot table (along with actuals).


Account Name	Opportunity Name	Sum Projected Dollars	Sum Actual Dollars	Sum Billable Dollars	Sum Variance Dollars
<input type="checkbox"/> City of St. Charles	Lincoln Park	\$13,800.00	\$0.00	\$0.00	\$13,800.00
	Subtotal	\$13,800.00	\$0.00	\$0.00	\$13,800.00
<input type="checkbox"/> Holtrop & Co	Madison 101	\$0.00	\$1,600.00	\$1,600.00	(\$1,600.00)
	Subtotal	\$0.00	\$1,600.00	\$1,600.00	(\$1,600.00)
<input type="checkbox"/> Midwest Consulting	Kimball St	\$0.00	\$0.00	\$0.00	\$0.00
	Subtotal	\$0.00	\$0.00	\$0.00	\$0.00
Total Amount		\$13,800.00	\$1,600.00	\$1,600.00	\$12,200.00





Stage 4: Reduce The Effort Behind Logging Time & Expenses

PSA + Accounting Software

- ✓ Simplify the time and expense tracking process in BigTime while giving project managers access to the data they need to stay on track.
- ✓ Generate detailed time and expense reports in BigTime, providing valuable insights for project analysis, cost management, and client invoicing.
- ✓ Automate data flow from BigTime to an accounting system to ensure financial transactions are up-to-date in both systems for seamless tracking and reporting.

Time/Expense | My Timesheet

Week Day Add Timesheet Row Clear Blank Rows < 10/1/22 - 10/31/22 > 

Project	Task	Labor code	Sun	Mon	Tue
ABC Company Concepts	Project Management	Research	 5.00	 2.00	--
Stark Industries: Development	Project Management	Research	--	--	--
Stark Industries: Design	Development	UX Design	 2.00		
Sterling Cooper: Creative	Project Management	Research	--		
ABC Company; Research	Project Management	Consulting	 5.00		
ABC Company: Build Out	Design	Research	--		

Timesheet Approval Confirmation

You selected 5.00 hours to approve. By clicking OK below, you are certifying that:

1. I have reviewed the timesheet data entered by my direct reports and it is accurate.
2. Each time entry has, to the best of my knowledge, been correctly associated with the appropriate Project, contract number or name.

Please enter your name as well as your BigTime password in the space provided below. Then click the APPROVE button.

Your Name: BigTime Password:

Stage 5: Invoicing

PSA + Accounting

- ✓ Integrate BigTime with your accounting software to allow project managers to generate accurate and timely invoices based on project milestones, deliverables, or time-based billing.
- ✓ Build multi-level review and approval processes in BigTime for timesheets, expense reports, and invoices to accelerate sign-off and the time it takes to get paid.
- ✓ Post invoices created in BigTime to the accounting system for A/R tracking.

QuickBooks | Post Timesheets

Post Selected Time | < August 2021 > | Show Unposted Only

<input type="checkbox"/> Task	Period	Entered
<input type="checkbox"/> Mackenzie Riley	8/8/21-8/14/21	40.00
<input checked="" type="checkbox"/> Jason Stephenson	8/8/21-8/14/21	42.00
<input type="checkbox"/> Laura Scott		
<input type="checkbox"/> Bridget Poetker		
<input type="checkbox"/> Leanna Michniuk		

Preview | Invoice Detail | Time(0.00) | Expense(\$0.00)

City of Chicago
James Smith
1 Madison Ave.
Chicago, IL 60606

\$810,057.00

[Click here to choose another address](#)

Timesheet Period	Quantity	Rate	Amount	Actions
Development	8.00	\$100.00	\$800.00	<input type="checkbox"/>
Click here to choose another address				
Development	8.00	\$100.00	\$800.00	<input type="checkbox"/>
Click here to choose another address				

| Invoice Notes/Memo

Stage 6: Payments

PSA + Accounting + CRM Software

- ✓ Record payments in both BigTime, your accounting system, and CRM for increased accuracy and visibility.
- ✓ Reduce the effort required to get paid for the work you do by giving clients the option in BigTime to pay by credit card or ACH.
- ✓ Get paid for work faster by invoicing quicker and incorporating automatic payments in BigTime through BigTime Wallet.

The screenshot displays an email notification from Kensington Riles Consulting regarding invoice #05007. The interface includes a 'LOGIN' button, a detailed invoice card, and a 'PAY INVOICE' button. The invoice card shows the company name, address, and a payment due amount of \$3,200.00 with a due date of 07/22/20. The email body contains a message from the sender and a 'New Invoice' summary.

Invoice #05007 Inbox x

KR Kensington Riles Consulting
to me ▾ 1:10 PM (4 minutes ago)

Kensington Riles Consulting

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!

New Invoice
\$3200 due on Wednesday, July 22, 2020

PAY INVOICE

Services Description
Invoice #05007
Wednesday, July 22, 2020

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KR KENSINGTON RILES CONSULTING
1207 Sunset Dr.
McHenry, IL 60605
847-123-4567

Payment Due:
\$3,200.00

Invoice Number
05007

Due Date
07/22/20

PAY INVOICE

BigTime Customer Sees 50% Reduction In Billing Time

You heard that right. Aegis Project Controls, a consulting firm and BigTime customer was able to achieve a 50% reduction in billing process time as well as a 50% decrease in financial administrative tasks.

[Read Case Study](#)

[CLICK HERE >](#)



"We were using a combination of three different systems for time, accounting, and billing that we had to mesh together through uploads and reconciliations. With the Sage Intacct + BigTime integration, we brought all of our data into one consolidated platform, cutting our billing process in half."

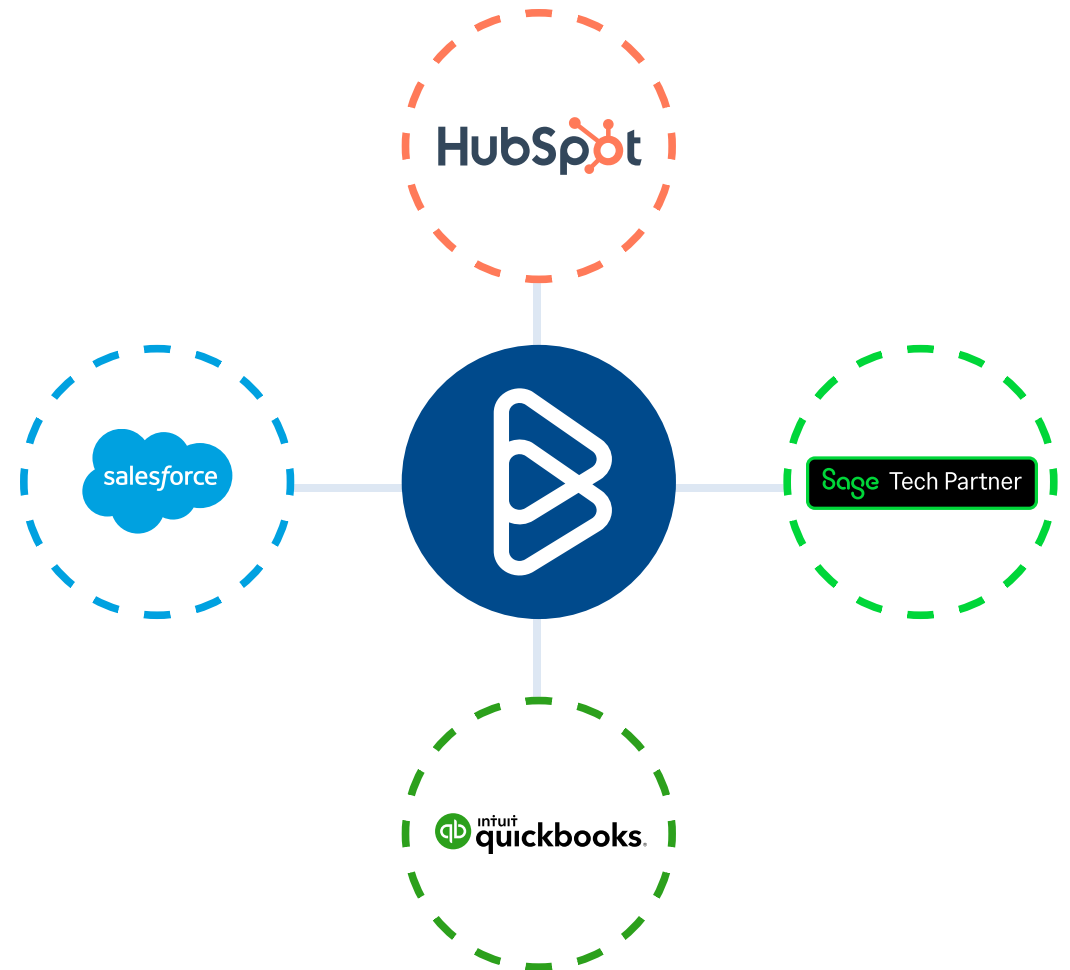


KYLE MCDONALD,
Chief Financial Officer, Aegis
Project Control

Connect BigTime With Your Existing Software Stack For Smarter Operations

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 reporting and analytics.



Ready to get started? See what BigTime's integrations can do for your team

[REQUEST A DEMO](#)

