Just Released – Account Manager!

Bill4Time has added new management features! This functionality is designed for Account Managers to manage the data entered for clients they manage.

Within each user you have the ability to toggle on Account Manager functions like “View Entries”, “Edit Entries”, and “View Billable Rates” under User Permissions.

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Once these functions are turned on, the Account Manager will have the ability to go under Time/Expenses, Projects , and Reports to view the time entered for all users on any client they manage. This will not affect their ability to add time for clients they have access to, but do not manage. So if a user has limited access in the system, these permissions will still stand on clients they do not manage.

On Reports, each user will still be able to run reports for themselves; but now, they will also be able to run the reports for the users that enter time and expenses on clients they manage. In the example below, user “Kristin ONeill” has access to add time to client “Phyllis D’mar”, but she is not the account manager for this client. However, she is the account manger on client “Sally Moore”, so she can view and edit the entries for users Jane Smith, Kevin Moore, and herself, on this report.

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