



ProAdvisor Tips for Accurate Job Costing

Maximize profitability by implementing best practices in QuickBooks Online.

Billable Expense Essentials

Key insights into marking expenses as billable effectively.

- ☐ Ensure each expense is marked as billable in the expense entry screen.
- ☐ Verify the correct customer is assigned to each billable expense.

Avoiding Common Mistakes

Detailed tips to prevent errors like forgetting to assign a customer.

- ☐ Regularly review unassigned expenses and allocate them to the correct customer.
- ☐ Set up reminders to check for missing customer assignments before month-end.

Markup Strategies

Recommended strategies for setting default markup percentages.

- ☐ Set a default markup percentage in the company settings under 'Sales'.
- ☐ Review markup settings quarterly to ensure they align with current business goals.

Reporting Insights

How to use reports like 'Unbilled Charges' for accuracy checks.

- ☐ Run the 'Unbilled Charges' report monthly to identify outstanding billable expenses.
- ☐ Cross-check the 'Unbilled Charges' report with invoices to ensure all charges are billed.

Monthly Review

Steps to ensure all expenses are captured and correctly invoiced.

- ☐ Conduct a monthly review of all expenses to confirm they are accurately recorded.
- ☐ Ensure all billable expenses are included in invoices before closing the month.