

# QuickBooks Online Plus – How to Leverage “Job Costing”

**NOTES:** Below Job Costing solution was based on Intuit’s Online Plus “Answers” forum which recommended using “Bill with Parent” option for question: “Does Online Plus offer job costing?” [https://qboe.custhelp.com/app/answers/detail/a\\_id/1072/kw/job/r\\_id/103898](https://qboe.custhelp.com/app/answers/detail/a_id/1072/kw/job/r_id/103898)

Intuit’s Online Plus beta was used as test environment for all documentation contained herein. <https://accounting.quickbooks.com/redirect/testdrive?sc=QOE-TYB-SAM-SAT>

- 1) Below is a screen-shot of 3 customer sub-accounts I created using “Bill with Parent” option on Customer Information form to leverage “**Job Costing**” capabilities within QB Online Plus.

Step #1: Click on CUSTOMER tab to access Customer Center

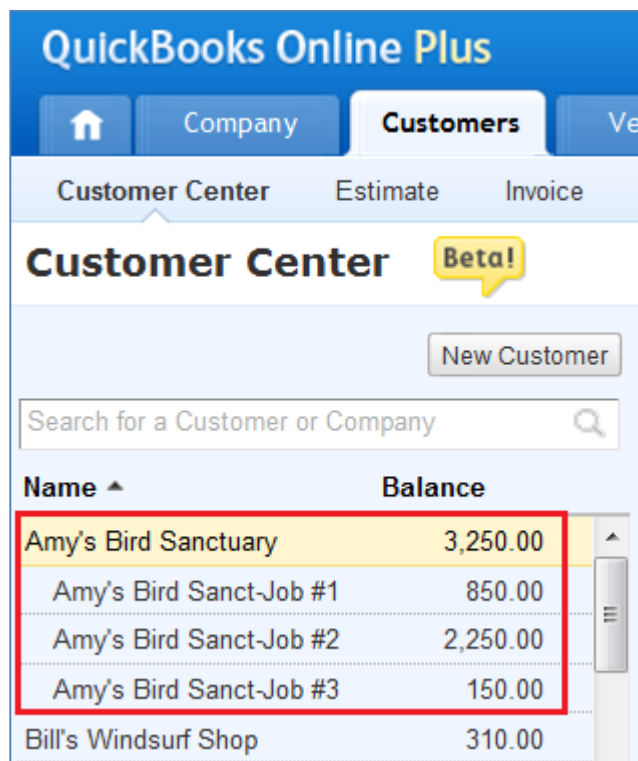
Step #2: Click on “New Customer” button and insert customer sub-account name to track by job.  
Append “Job #1” to customer name (“Amy’s Bird Sanctuary-**Job #1**”)

Step #3: Sselect “Is Sub-customer?” checkbox in lower right-hand section of form

Step #4: Make sure “Bill with Parent” radio button is chosen

Step #5: Click “Save” and you’re done.

The new customer sub-account(s) will appear in Customer Center under the parent customer and you will be able to track jobs using both customer parent and sub-account levels.



The screenshot shows the QuickBooks Online Plus interface. At the top, there are navigation tabs for 'Company', 'Customers', and 'Vendor'. Below this is the 'Customer Center' section, which includes a 'Beta!' badge and a 'New Customer' button. A search bar is present with the text 'Search for a Customer or Company'. Below the search bar is a table with two columns: 'Name' and 'Balance'. The table lists several customers, with a red box highlighting the sub-accounts under 'Amy's Bird Sanctuary'.

Name	Balance
Amy's Bird Sanctuary	3,250.00
Amy's Bird Sanct-Job #1	850.00
Amy's Bird Sanct-Job #2	2,250.00
Amy's Bird Sanct-Job #3	150.00
Bill's Windsurf Shop	310.00

2) Screen-shot below shows customized P&L report with job costing/tracking enabled (red box).

Step #1: Under **REPORTS** tab, click on **PROFIT & LOSS** report.

Step #2: After clicking “**Customize ...**” button, make the following 2 changes:

- 1) Under **Rows/Columns** section in **Customize Profit & Loss** dialog box, change **Columns** drop-down list value from “Total Only” to “Customers”.
- 2) Scroll down to **Lists** section in **Customize Profit & Loss** dialog box, select the Customer sub-account (Amy's Bird Sanct-Job #1) that you created above using “Bill with Parent” option. This will update the P&L report to track at job level.

Note: The customized P&L screen-shot below shows figures for both the parent-level customer and also at the job/customer sub-account level.

<b>Craig's Design &amp; Landscaping Services</b>				
<b>Profit &amp; Loss</b>				
January 1 - March 15, 2011				
	▼ Amy's Bird Sanctuary ▼	▼ Amy's Bird Sanct-Job #1 ▼	Total Amy's Bird Sanctuary ▼	TOTAL ▼
<b>Income</b>				
Design Income		300.00	300.00	\$300.00
Landscaping Services				\$0.00
Job Materials				\$0.00
Fountains and Garden Lighting		325.00	325.00	\$325.00
Plants and Sod		190.00	190.00	\$190.00
<b>Total Job Materials</b>	0.00	<b>515.00</b>	<b>515.00</b>	<b>\$515.00</b>
<b>Total Landscaping Services</b>	0.00	<b>515.00</b>	<b>515.00</b>	<b>\$515.00</b>
Pest Control Services		35.00	35.00	\$35.00
<b>Total Income</b>	<b>\$0.00</b>	<b>\$850.00</b>	<b>\$850.00</b>	<b>\$850.00</b>
<b>Expenses</b>				
Utilities				\$0.00
Telephone		98.07	98.07	\$98.07
<b>Total Utilities</b>	0.00	<b>98.07</b>	<b>98.07</b>	<b>\$98.07</b>
<b>Total Expenses</b>	<b>\$0.00</b>	<b>\$98.07</b>	<b>\$98.07</b>	<b>\$98.07</b>
<b>Net Operating Income</b>	<b>\$0.00</b>	<b>\$751.93</b>	<b>\$751.93</b>	<b>\$751.93</b>
<b>Net Income</b>	<b>\$0.00</b>	<b>\$751.93</b>	<b>\$751.93</b>	<b>\$751.93</b>

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