

Invoicing, Progress Invoicing, Job Costing, and Reporting

About this Guide and Webinar

This guide is designed to accompany our webinar entitled *Invoicing, Progress Invoicing, Job Costing, and Reporting*, in which you will be introduced to the concept and use of *Invoices* in QuickBooks Online. *Invoices* are what you send to your construction customers, and it is based on these *Invoices* that your customers pay you. This webinar will cover invoicing based on an estimate, as well as progress invoicing (multiple invoices from an estimate), job costing, and reporting on these areas.

Note: this supplemental guide and the video it accompanies were prepared using QuickBooks Online (“QBO”) Plus Canada and a Construction Demo company set up specifically by the author for this purpose. This company is not available to students taking this webinar, but you can set up your own company with this Demo company as a model. You can also access the QuickBooks Online Canada Sample Company, *Long for Success – Event Planning* to test out what you’ve learned. *Long for Success – Event Planning* is a “dummy” set of QBO Plus books that will maintain your additions, deletions, and edits only as long as the browser windows you use to access it are open, or after a period of inactivity. *Do not use this company as your real set of books.* The *Long for Success – Event Planning* is accessible here: <http://tinyurl.com/canadasampledta>.

What are Invoices in QuickBooks Online?

Invoices are sales forms you use to notify your customers that they owe you money. They are populated, very much the way estimates are, with customer details, the date, and product or service items, which are linked to the general ledger or chart of accounts. Unlike estimates, invoices do affect the general ledger. Invoices for service items, such as we are using for construction, affect those linked general ledger accounts, usually income accounts (AKA revenue or sales) and any sales taxes being collected.

Invoices that are issued to customers but not yet paid in full increase Accounts Receivable (“A/R”), and you can view A/R reports so that you know *who* owes you *how much* and *from when*.

There are other sales forms, such as Sales Receipts and Credit Memos, but those are not necessary at the present time. Your income will result mainly, if not entirely, from producing invoices.

You can start your sales workflow with an invoice to a customer, but in a construction setting we are going to focus on invoicing from an estimate.

Invoicing in Full from an Estimate

QuickBooks has made it very simple to invoice in full from an estimate. The workflows that follow assume that Progress Invoicing, the ability to issue two or more partial invoices from an estimate, is not enabled. We’ll cover that later in this webinar.

To invoice from an estimate, you can follow one of two workflows.

Workflow #1: Invoicing from inside the estimate

1. Open the estimate from which you wish to issue an invoice. You can find the estimate in many ways, but we'll concentrate on clicking on it from the Customer or Sub-customer record's transaction list tab.

Barata, Luis ✉ 🔗 Edit New transaction ▾

Add notes

Transaction List Customer Details

Batch actions ▾ Filter ▾

<input type="checkbox"/>	DATE ▾	TYPE	NO.	MEMO	DUE DATE	BALANCE	TOTAL BEFORE SALE	SALES TAX	TOTAL	STATUS	ACTION
<input type="checkbox"/>	02/17/2021	Estimate	1002		02/17/2021	\$0.00	\$23,560.00	\$3,062.80	\$26,622.80	Accepted	Create invoice ▾
Total						\$0.00			\$26,622.80		

< First Previous 1-1 of 1 Next Last >

2. With the estimate open, select **Create invoice** in the top right corner.

Estimate no.1002 ? Help ✕

Customer: Barata, Luis:Tea and Crumpets Ro ✕ Email: barata@mailinator.com

Accepted ▾ Send link Co/Bo

Billing address: Barata, Luis:Tea and Crumpets Room, 1223 Street Avenue, Ottawa ON: K1Z 2Z2

Estimate date: 02/17/2021 Expiration date: 02/28/2021

Estimate no.: 1002

Tags 🏷 Manage tags

Start typing to add a tag

Amounts are: Exclusive of Tax ▾

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX	
1	03/01/2021	Direct Costs:Cabinetry & Countertops	Cabinetry & Countertops Materials	1	15,000	15,000.00	HST ON	🗑
2	03/08/2021	Direct Costs:Cabinetry & Countertops Labour	Cabinetry & Countertops Labour	1	5,600	5,600.00	HST ON	🗑
3	03/15/2021	Direct Costs:Clean Up Materials	Clean Up Materials	1	100	100.00	HST ON	🗑
4	03/15/2021	Direct Costs:Clean Up Labour	Clean Up Labour	1	350	350.00	HST ON	🗑

3. The invoice pops open, populated with details brought over from the estimate. It also includes a link to the estimate in the header. Make any changes such as the date or message.

Invoice no.1002 Help

1 linked Estimate

Customer: Barata, Luis Tea and Crumpets Ro Get set up
 Cards visa mc

BALANCE DUE
\$26,622.80

Invoice no.

Billing address: Barata, Luis Tea and Crumpets Room, 1223 Street Avenue, Ottawa ON, K1Z 2Z2
 Terms: Net 30 Invoice date: 02/19/2021 Due date: 03/21/2021

Tags: Manage tags

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	03/01/2021	Direct Costs:Cabinetry & Countertops	Cabinetry & Countertops Materials	1	15,000	15,000.00	HST ON
2	03/08/2021	Direct Costs:Cabinetry & Countertops Labour	Cabinetry & Countertops Labour	1	5,600	5,600.00	HST ON
3	03/15/2021	Direct Costs:Clean Up Materials	Clean Up Materials	1	100	100.00	HST ON
4	03/15/2021	Direct Costs:Clean Up Labour	Clean Up Labour	1	350	350.00	HST ON
5	03/01/2021	Direct Costs:Cabinetry & Countertops	Additional Cabinet Materials approved by LB Feb 19 21	1	1,000	1,000.00	HST ON

Amounts are:

4. **Save** the invoice.
5. If you open the estimate again, you see a link to the invoice in the header. And remember: once you've invoiced from an estimate in full, the estimate's status changes automatically to *Closed*.

Estimate no.1002 Help

1 linked Invoice

Customer: Send later Co/Bo

AMOUNT
\$26,622.80

Estimate no.

Billing address: Barata, Luis Tea and Crumpets Room, 1223 Street Avenue, Ottawa ON, K1Z 2Z2
 Estimate date: 02/17/2021 Expiration date: 02/28/2021

Tags: Manage tags

Closed

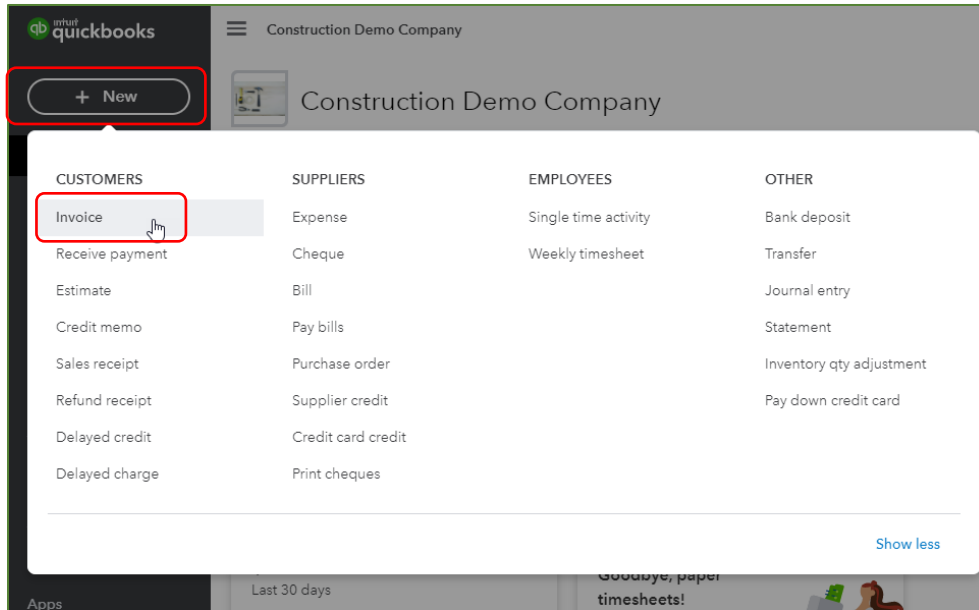
#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1	03/01/2021	Direct Costs:Cabinetry & Countertops	Cabinetry & Countertops Materials	1	15,000	15,000.00	HST ON

Amounts are:

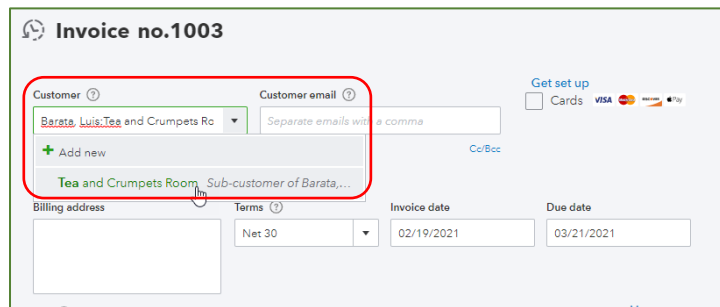
There is a second way to create an invoice from an estimate.

Workflow #2: Invoicing from outside the estimate

1. Select **+New** and then **Invoice**.



2. Enter or select the name of the customer or sub-customer and then hit the **TAB** key to get to the next field.



3. A “drawer” pops out from the right side of the screen with items you may wish to add to the invoice (such as billable time and expenses, etc.). Choose the estimate linked to that sub-customer and select **Add**. (FYI you would be able to select more than one estimate to add to this invoice.)

Invoice no.1003

Customer: Barata, Lusia Tea and Crumpets Ro
 Customer email: lberata@mailinator.com
 Get set up: Cards, Visa, Mastercard, American Express
 Send later, CoBoc

Billing address: Barata, Lusia Tea and Crumpets Room, 1223 Street Avenue, Ottawa ON, K1Z 2Z2
 Terms: Net 30
 Invoice date: 02/19/2021
 Due date: 03/21/2021
 Invoice no.: 1003

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1							
2							

Subtotal: \$0.00
 Total: \$0.00
 Balance due: \$0.00

Message on invoice: This will show up on the invoice.
 Message on statement:

Estimate #1002
 Feb 17
 \$26,622.80 | Taxable
 • Cabinetry & Counterto...
 • Cabinetry & Counterto...
 • Clean Up Materials
 More
 Add (highlighted in red) Open

4. Make any edits as in the first set of instructions and **Save** the invoice. As before, both the invoice and the estimate have hyperlinks to each other in their respective headers.

What is Progress Invoicing?

As we saw, you can invoice fully from an estimate in one invoice if you so choose.

In addition, however, you can enable Progress Invoicing in QuickBooks to create partial invoices from an estimate, and QBO will track what you have invoiced so far compared to the original estimate.

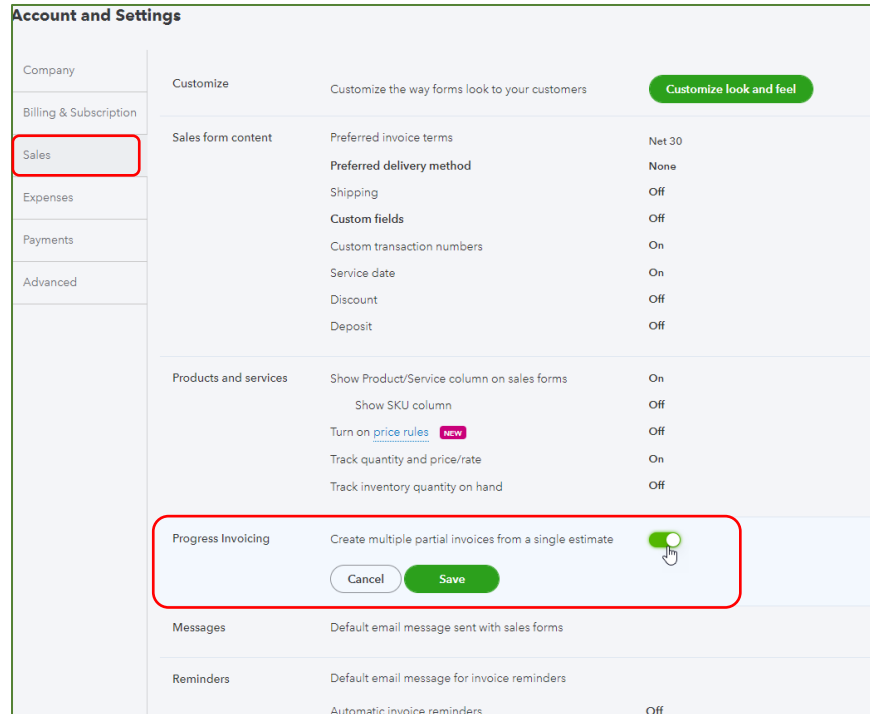
Progress invoicing allows for the following:

- Divide project estimates into multiple invoices based on milestones or phases or dates
- On each line item of a progress invoice, you can use a full, partial, or custom amount to invoice clients as you go, and your progress for that line item is tracked automatically
- Each estimate shows customers exactly what's been invoiced from it so far, as well as the remaining balance

If progress invoicing is for you, you'll need to enable it in QuickBooks.

Enabling Progress Invoicing

Select the **gear icon** at the top right of the QBO screen > **Account and settings** > **Sales** > **Progress Invoicing**. Toggle to turn on Progress Invoicing. Select **Save** in the *Progress Invoicing* section and **Done** at the bottom right of the screen.



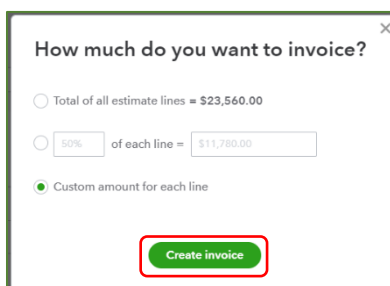
If you've turned on progress invoicing but have discovered it's not for you, you can always disable it selecting the **gear icon** at the top right of the QBO screen > **Account and settings** > **Sales** > **Progress Invoicing** and toggling the other way.

Progress Invoicing from an Estimate

To issue a progress invoice from an estimate, as before, you can follow one of two workflows.

Workflow #1: Progress invoicing from inside the estimate

1. Open the estimate from which you wish to issue an invoice.
2. Select **Create invoice** in the top right section of the header.
3. Now that Progress Invoicing is turned on, you'll see a new window pop up before the invoice appears: *How much to you want to invoice?*



4. Select one of the three options:
 - Total of all estimate lines (invoice in full)
 - Percentage of each line (you enter the percentage)
 - Custom amount for each line
5. Select **Create invoice**.

- Let's assume that you chose the most complex option, **Custom amount for each line**. A zero-dollar invoice appears, populated with the items from the linked estimate. Line by line, enter the percentage or dollar amount you wish to invoice from the estimate total for that item.

Invoice no.1003

1 Linked Estimate

Customer: Barata, Luis Tea and Crumpets Rco
Customer email: barata@smallintor.com

Get set up: Cards, Visa, Mastercard

BALANCE DUE: **\$0.00**

Invoice no.: 1003

Billing address: Barata, Luis Tea and Crumpets Rco, 1223 Street Avenue, Ottawa ON K1Z 2Z2

Terms: Net 30 | Invoice date: 02/19/2021 | Due date: 03/21/2021

Tags: Start typing to add a tag

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	DUPLICATE	QTY	RATE	AMOUNT	SALES TAX
1	03/01/2021	Direct Costs:Cabinetry & Countertops	Cabinetry & Countertops Materials	Amount: 0.00 of 15000.00	0.00	15000	0.00	HST ON
2	03/08/2021	Direct Costs:Cabinetry & Countertops Labour	Cabinetry & Countertops Labour	Percent	0.00	5,600	0.00	HST ON
3	03/15/2021	Direct Costs:Clean Up Materials	Clean Up Materials	Amount: 0.00 of 100.00	0.00	100	0.00	HST ON
4	03/15/2021	Direct Costs:Clean Up Labour	Clean Up Labour	Amount: 0.00 of 350.00	0.00	350	0.00	HST ON
5	03/01/2021	Direct Costs:Cabinetry & Countertops	Additional Cabinet Materials approved by LB Feb 18 21	Amount: 0.00 of 1,000.00	0.00	1,000	0.00	HST ON

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	DUPLICATE	QTY	RATE	AMOUNT	SALES TAX
1	03/01/2021	Direct Costs:Cabinetry & Countertops	Cabinetry & Countertops Materials	50% of 15,000.00	0.5	15,000	7,500.00	HST ON
2	03/08/2021	Direct Costs:Cabinetry & Countertops Labour	Cabinetry & Countertops Labour	1,000.00 of 5,600.00	0.1785714	5,600	1,000.00	HST ON
3	03/15/2021	Direct Costs:Clean Up Materials	Clean Up Materials	0% of 100.00	0.00	100	0.00	HST ON
4	03/15/2021	Direct Costs:Clean Up Labour	Clean Up Labour	0.00 of 350.00	0.00	350	0.00	HST ON
5	03/01/2021	Direct Costs:Cabinetry & Countertops	Additional Cabinet Materials approved by LB Feb 18 21	30% of 1,000.00	0.3	1,000	300.00	HST ON
6	03/01/2021	Direct Costs:Cabinetry & Countertops Labour	Additional Cabinet Materials approved by LB Feb 18 21	35% of 1,560.00	0.35	1,560	546.00	HST ON

- Save** the invoice.

As we saw with invoicing fully from an estimate, there is a second way to create a progress invoice.

Workflow #2: Progress invoicing from outside the estimate

Let's proceed with a second progress invoice after having issued our first one, above.

- Select **+New** and then **Invoice**.
- Enter or select the name of the customer or sub-customer and then hit the **TAB** key to get to the next field.
- A "drawer" pops out from the right side of the screen with items you may wish to add to the invoice (such as billable time and expenses, etc.). Choose the estimate linked to that sub-customer and select **Add**. (FYI you would be able to select more than one estimate to add to this invoice.)
- Now that Progress Invoicing is turned on, you'll see a new window pop up before the invoice appears: *How much to you want to invoice?* However, this time, QuickBooks is allowing you to invoice only up to the maximum amount of the remaining total, given that you've invoiced from this estimate before. Choose your option and select **Copy to invoice**.

How much do you want to invoice?

Remaining total of all lines = \$14,214.00

50% of each line = \$11,780.00

Custom amount for each line

[Copy to invoice](#)

5. Again, let's assume that you chose the most complex option, **Custom amount for each line**. A zero-dollar invoice appears, populated with the items from the linked estimate. Line by line, enter the percentage or dollar amount you wish to invoice from the estimate total for that item. If you try and save the invoice for more than the original total line amount for any item, you'll see an *Estimate overage* window which warns you that you're going over on at least one item's quote. You can cancel and edit the invoice, or, if you meant to go over the original estimate amount, select **Go over**. It's a good practice to open the original estimate to review the original quoted amount as well as any amount outstanding, line by line.

Estimate overage

At least one of the line items is over the estimated amount.

[Cancel](#)
[Go over](#)

6. When you're finished with your edits, **Save** the invoice.
7. Each invoice will have a link to the original estimate.
8. The estimate will have a hyperlink to as many progress invoices as you ultimately create. You can also see, line by line, what's been invoiced of the total, how much is remaining (notice we went over on the first item, but in most cases you'll end up having invoiced for 100% of each item over time), and if you've invoiced completely for any item, you'll see a green checkmark in the *Closed* column.

Estimate no.1002 Help

2 linked transactions

Customer: 116 Luis, Tega and Crumpets Room Email: barata@mailinator.com Create Invoice **\$26,622.80**

Accepted Send later Co/Bo

Billing address: Barata, Luis Tega and Crumpets Room
1233 Street Avenue
Ottawa ON, K1Z 2Z2 Estimate date: 02/17/2021 Expiration date: 02/28/2021 Estimate no.: 1002

Tags Manage tags

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX	INVOICED	REMAINING	CLOSED
1	03/01/2021	Direct Costs:Cabinetry & Countertops	Cabinetry & Countertops Materials	1	15,000	15,000.00	HST ON	22,500.00	-7,500.00	✓
2	03/08/2021	Direct Costs:Cabinetry & Countertops Labc	Cabinetry & Countertops Labour	1	5,600	5,600.00	HST ON	1,000.00	4,600.00	

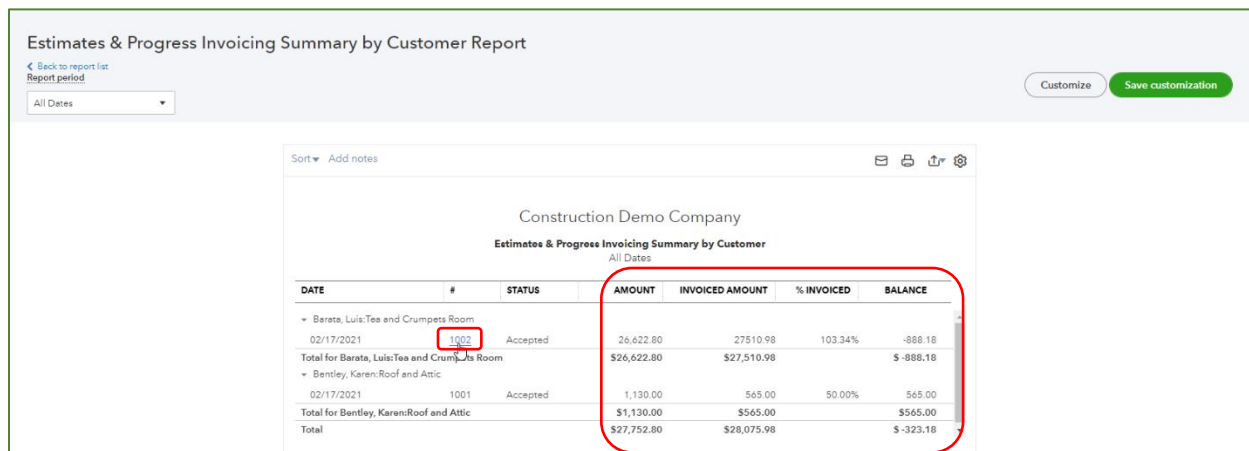
Amounts are | Exclusive of Tax

Reporting on Estimates and Related Invoices

As we learned in the webinar entitled *Estimates, Change Orders, and Reporting*, you can produce two standard reports related to estimates: *Estimates & Progress Invoicing Summary by Customer* and *Estimates by Customer*. These are found in the *Sales and customers* grouping of standard reports, and you can also search for them in the Reports tab by starting to enter “est” (or any other part of the report name) in the search bar.

The *Estimates by Customer* report, introduced in the webinar entitled *Estimates, Change Orders, and Reporting*, will not indicate any progress invoices.

The *Progress Invoicing Summary by Customer* report, however, will provide us the progress invoicing information we need. Its default report period is *All Dates*. If you need to see detail about a particular estimate’s line items, you’ll need to click on the estimate to open and review it.



Estimates & Progress Invoicing Summary by Customer Report

Back to report list
Report period: All Dates

Customize Save customization

Sort Add notes

Construction Demo Company
Estimates & Progress Invoicing Summary by Customer
All Dates

DATE	#	STATUS	AMOUNT	INVOICED AMOUNT	% INVOICED	BALANCE
Barata, Luis:Tea and Crumpets Room						
02/17/2021	1002	Accepted	26,622.80	27510.98	103.34%	-888.18
Total for Barata, Luis:Tea and Crumpets Room			\$26,622.80	\$27,510.98		\$ -888.18
Bentley, Karen:Roof and Attic						
02/17/2021	1001	Accepted	1,130.00	565.00	50.00%	565.00
Total for Bentley, Karen:Roof and Attic			\$1,130.00	\$565.00		\$565.00
Total			\$27,752.80	\$28,075.98		\$ -323.18

Customizing Invoice Templates

As we saw with estimates, you can customize your invoice template(s) so that invoices get sent to customers looking the way you want for your image. You can customize an invoice template in the same fashion as customizing an estimate template. Review the section on *Customizing Estimate Templates* in the webinar entitled *Estimates, Change Orders, and Reporting* to refresh your memory on how to do this, including how to select a default estimate template and how to customize an estimate from the bottom of the estimate screen. You can select a default invoice template and customize an invoice from the bottom of the invoice screen in exactly the same way.

More information on customizing templates can be found here: <https://quickbooks.intuit.com/learn-support/en-ca/customise-forms/customize-invoices-estimates-and-sales-receipts-in-quickbooks/00/291044>.

Job Costing and Reporting

Any invoice is automatically linked to a customer or sub-customer, by virtue of the fact that an invoice needs that name in order to be saved (it cannot be saved without a name).

Costs, however, require an extra field to be filled out in order to link them to a customer or sub-customer. We will use the two-sided service items we created on these purchase forms, and the costs will be linked to the purchase account on each item's setup as well as the customer or sub-customer indicated on the form.

On bills, cheques, expense and credit card credit forms, you'll use the *Item details* grid (if it's collapsed, expand it by clicking on the caret icon to the left of the words *Item details*). You can, if you wish, collapse the *Category details* grid, just to keep it out of the way.

Enter the items you've purchased, and use the service items you've set up. Enter the quantity (default to 1) and unit price or just enter the total amount as well as the sales tax code. Enter the customer or sub-customer name in the *Customer* or *Customer/Project* field. Save the transaction.

Bill no. 43567

Supplier: Deboon's Exteriors

BALANCE DUE: \$2,373.00

Make payment

Mailing address: Deboon's Exteriors, Deboon's Exteriors

Terms: Net 15

Bill date: 02/22/2021

Due date: 03/09/2021

Bill no.: 43567

Tags: Start typing to add a tag

Category details

Item details

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX	CUSTOMER / PROJECT
1	Direct Costs Exterior Windows & Doors	Exterior Windows and Doors	4	400	1,600.00	HST ON	Barata, Luis, Tea and Crumpets Room
2	Direct Costs Exterior Windows & Doors	Exterior Windows and Doors	2	250	500.00	HST ON	Cloran, Jason 400 SQ Ft Addition
3							

Add lines Clear all lines

Memo

Subtotal: \$2,100.00

HST (ON) @ 13% on 2,100.00: 273.00

Total: \$2,373.00

Attachments Maximum size: 20MB

Cancel Revert Make recurring More Save Save and close

Once your costs are entered, you can run a Profit and Loss by Customer report. Choose your report period.

You will see the income/revenue and costs/expenses by customer and sub-customer. You can drill down into any figure on this report to get to a list of transactions that made up that figure, and you can drill down on that list of transactions to open any individual transaction for reviewing and editing.

Now you have job costing!

Profit and Loss by Customer Report

← Back to report list
Report period: This Month 02/01/2021 to 02/28/2021

Display columns by: Customers
Show non-zero or active only: Active rows/active columns
Compare another period: Select period
Accounting method: Cash Accrual

Customize **Save customization**

Run report

Construction Demo Company
Profit and Loss by Customer
January 1 - February 22, 2021

	BARATA, LUIS	TEA AND CRUMPETS ROOM	TOTAL BARATA, LUIS	BENTLEY, KAREN	ROOF AND ATTIC	TOTAL BENTLEY, KAREN	CIORAN, JASON	600 SQ FT ADDITION	TOTAL CIORAN, JASON	TOTAL
INCOME										
Construction Income		24,346.00	24,346.00		500.00	500.00				\$24,846.00
Total Income	\$0.00	\$24,346.00	\$24,346.00	\$0.00	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$24,846.00
COST OF GOODS SOLD										
Cost of Goods Sold										\$0.00
Direct Materials Costs		1,600.00	1,600.00					500.00	500.00	\$2,100.00
Total Cost of Goods Sold		1,600.00	1,600.00					500.00	500.00	\$2,100.00
Total Cost of Goods Sold	\$0.00	\$1,600.00	\$1,600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00	\$2,100.00
GROSS PROFIT	\$0.00	\$22,746.00	\$22,746.00	\$0.00	\$500.00	\$500.00	\$0.00	\$ -500.00	\$ -500.00	\$22,746.00
PROFIT	\$0.00	\$22,746.00	\$22,746.00	\$0.00	\$500.00	\$500.00	\$0.00	\$ -500.00	\$ -500.00	\$22,746.00

You can also get this report if you select a regular Profit and Loss report and choose to **Display columns by** and then choose *Customers*.

The regular Profit and Loss report is very flexible, in that you can choose your columns to be other parameters.

In fact, you can also run a regular Profit and Loss report and choose to **Display columns by** *Products/Services* so you can see profitability of those two-sided items:

Construction Demo Company
Profit and Loss
January 1 - February 22, 2021

	DIRECT COSTS	BRICKLAYING LABOUR	BRICKLAYING MATERIALS	CABINERY & COUNTERTOPS	CABINERY & COUNTERTOPS LABOUR	CLEAN UP LABOUR	CLEAN UP MATERIALS	DEMOLITION MATERIALS	DESIGN SERVICES	ELECTRIC
INCOME										
Construction Income		500.00		22,800.00	1,546.00	0.00	0.00			10,000.00
Total Income	\$0.00	\$500.00	\$0.00	\$22,800.00	\$1,546.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00
COST OF GOODS SOLD										
Cost of Goods Sold										\$0.00
Direct Materials Costs			100.00							50.00
Total Cost of Goods Sold			100.00							50.00
Total Cost of Goods Sold	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00
GROSS PROFIT	\$0.00	\$500.00	\$ -100.00	\$22,800.00	\$1,546.00	\$0.00	\$0.00	\$ -50.00	\$10,000.00	\$0.00
PROFIT	\$0.00	\$500.00	\$ -100.00	\$22,800.00	\$1,546.00	\$0.00	\$0.00	\$ -50.00	\$10,000.00	\$0.00

And if you wanted to get super granular, you can take that profitability report, select the **Customize** button, and filter it for one or more customers, sub-customers, or projects by placing a checkmark in the checkbox(es). Make your customizations and then choose **Run report**.

Customize report

▼ General

Report period
 Custom 01/01/2021 to 02/22/2021

Accounting method
 Cash Accrual

Number format
 Divide by 1000
 Without cents
 Except zero amount

▼ Rows/Columns

Columns
 Products/Services

▼ Filter

Customer

Distribution Account

Supplier

Employee

▼ Filter dropdown menu:

- All
- Not Specified
- Specified
- (Select all)
- Barata, Luis
- Barata, Luis:Basement Reno
- Barata, Luis:Tea and Crumpets Room
- Bentley, Karen
- Bentley, Karen:Door Handles

Run report

The resulting report would be filtered but you would have to change the title to indicate the filters in place. Here, for example, we've changed the title to indicate the customer(s) chosen in the filter:

Construction Demo Company

Profit and Loss - for Luis Barata
 January 1 - February 22, 2021

	DIRECT COSTS	BRICKLAYING MATERIALS	CABINERY & COUNTERTOPS	CABINERY & COUNTERTOPS LABOUR	CLEAN UP LABOUR	CLEAN UP MATERIALS	EXTERIOR WINDOWS & DOORS	TOTAL DIRECT COSTS	TOTAL
▼ INCOME									
Construction Income			22,800.00	1,546.00	0.00	0.00		24,346.00	\$24,346.00
Total Income	\$0.00	\$0.00	\$22,800.00	\$1,546.00	\$0.00	\$0.00	\$0.00	\$24,346.00	\$24,346.00
▼ COST OF GOODS SOLD									
Cost of Goods Sold									\$0.00
Direct Materials Costs		100.00					1,600.00	1,700.00	\$1,700.00
Total Cost of Goods Sold	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,600.00	\$1,700.00	\$1,700.00
GROSS PROFIT	\$0.00	\$ -100.00	\$22,800.00	\$1,546.00	\$0.00	\$0.00	\$ -1,600.00	\$22,646.00	\$22,646.00
PROFIT	\$0.00	\$ -100.00	\$22,800.00	\$1,546.00	\$0.00	\$0.00	\$ -1,600.00	\$22,646.00	\$22,646.00

Be sure to watch our video on *Projects*.