Tip of the Week: How to Add Task/Expense Code as Billable, Non-Billable, or No Charge

There was no functionality for marking a Task/Expense Code as Billable, Non-Billable, or No Charge, unlike a Time/Expense Entry.

Due to this, managing the billable Expense/Task type was difficult and required a manual process to identify the billable type, which wasn't efficient.

It also required permissions to be set to allow timekeepers to edit the billable type, something that not all businesses are comfortable allowing.

To address this issue, we have now added the ability for you to set by default whether your Task/Expense Code is Billable, Non-Billable, or No Charge.

Today's tip of the week looks at how you can set up a Task/Expense Code as Billable, Non-Billable, or No Charge.

To add or edit a Task/Expense code, go to Time -> Settings (or Expense -> Settings) and click the Task Codes (or Expense Codes) tab.

To edit an existing Task/Expense code click on the name of the code in the far left column. In the dialog box, you will see a dropdown where you will be able to select the billable type for that particular Task/Expense Code, either Billable, Non-Billable or No Charge.

Once you select your preferred option, you will see the success message: "The default Billable Type for the Task Code has been overridden".

You will be able to generate Invoices/Reports for Billable Task/Expense with the actual amount provided while creating an entry.

If you'd like more help with the understanding of two-factor authentication or any tools, please call us at 1.800.715.1284, email us at support@timesolv.com or Contact support.

Contact support