

Potential Issue Using Projects in Transactions

Chapter 10

In Chapter 10, you are introduced to the project tracking feature in QBO. Although this is an essential feature for many businesses, getting **projects** working efficiently in QBO can be frustrating. Patience is the key to the process!

As described in Chapter 10 (pages 10-2 to 10-4), the process for activating the feature and the initial setup of specific **projects** is usually problem-free.

Some students have issues, though, when they try to access a **project** in a transaction for the first time. Although the **project** is set up correctly, it's not available in the customer dropdown menu when creating a transaction ((**timesheet**, **bill**, etc.). This is a timing issue. There can be a delay in QBO between when a **project** is set up and when it's useable in a transaction.

Here are some tips:

1. Make sure you're working in Chrome (the preferred browser for QBO) when you set up the **project**. Wait a few minutes before you try to access the new **project** in a transaction.
2. If you don't see the **project** in the dropdown menu when you're creating a transaction, refresh the webpage and try again.
3. That didn't work? Clear your browser's cash and try to access the **project** again.
4. If the **project** still doesn't appear, go back to the Project Center (see Figure 10.5) to verify that the **project** exists. If it doesn't appear, add the **project** again and retry entering the transaction. Wait a few minutes and refresh the webpage if necessary.
5. If you're **still** having problems accessing the **project** within transactions, log off and then log back in. Verify that the **project** is listed in the Project Center. If not, create the **project**. Wait 5-10 minutes and then try to access the **project** in a transaction. Refresh the browser if it doesn't appear. Repeat this step if necessary.

For most students, Steps 1 through 3 are sufficient. Unfortunately, some students need to repeat Step 4 or 5 multiple times.

Intuit is continually improving the application, so hopefully, this issue will soon be resolved.