Expense-Recording Best Practices

- Enter expenses promptly using the actual date and time.
- Use one consistent payee record per person or business.
- Choose specific, reusable categories.
- Select the real payment method.
- Turn on Pay From Register only when cash or payment is actually taken through that register workflow.
- Add an invoice, check, transaction, or confirmation number as the reference.
- Write a description that another manager can understand later.
- Attach the bill, receipt, or proof of payment.
- Review the expense before saving to avoid duplicate entries.

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