



**SIEGEL SOLUTIONS**  
CLIENT DRIVEN SOLUTIONS

# QuickBooks Online for Landscapers 101

GREEN INDUSTRY WINTER FORUM | FEBRUARY 12, 2025

# Ed Jaworski

- 20 years experience in corporate sector
- 24-year ProAdvisor (Advanced Certified, Top 100 ProAdvisor)
- Hobbies include sailing, jazz (I play saxophone), model railroading
- Married 25 years with a 21 yr. old daughter



# ED JAWORSKI



## ADVANCED CERTIFIED QUICKBOOKS PROADVISOR

- QuickBooks Consulting
- Working with small businesses since 2002
- Worked in corporate environment for 22 years
- B.S. Business / Accounting degree and MS Computer Information Systems



# Agenda

General features of QuickBooks, including:

- Invoicing
- Expense tracking
- Banking
- Profitability reporting

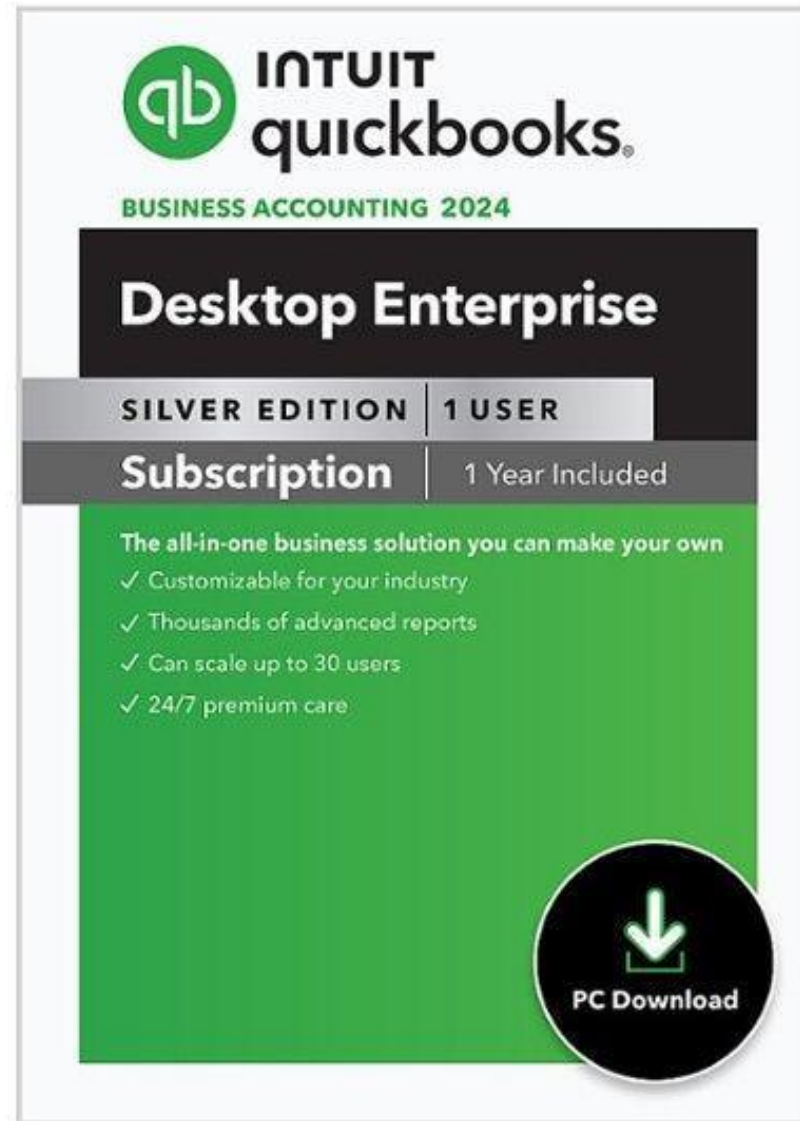


# QuickBooks Desktop (QBDT)

QB Pro and QB Premier have been discontinued

## QB Enterprise Solutions

- Higher capacity, richer features
- For the “middle market”
- More inventory functionality



The image shows a software box for Intuit QuickBooks Desktop Enterprise. At the top left is the Intuit QuickBooks logo. Below it, the text reads "BUSINESS ACCOUNTING 2024". The main title "Desktop Enterprise" is in large white letters on a black background. Below this, a grey bar indicates "SILVER EDITION | 1 USER". A darker grey bar below that says "Subscription | 1 Year Included". The main body of the box is green and contains the text "The all-in-one business solution you can make your own" followed by four bullet points: "✓ Customizable for your industry", "✓ Thousands of advanced reports", "✓ Can scale up to 30 users", and "✓ 24/7 premium care". In the bottom right corner, there is a circular button with a white download arrow icon and the text "PC Download".



# QuickBooks Online (QBO)

## QBO Simple Start

Entry level; meant for solopreneurs, 1 user

## QBO Essentials

Basic level, 3 users

## QBO Plus\*

Most widely used, 5 users  
Needed for Projects feature

## QBO Advanced\*

Feature rich; bonus apps; 25 users  
Increasingly attractive features for larger businesses

\* Needed for Job Cost and Project features



QuickBooks  
Online



# Feature Comparison

|                  | QB Desktop                      | QB Online                        |                       |                  |
|------------------|---------------------------------|----------------------------------|-----------------------|------------------|
|                  | Enterprise                      | Essentials                       | Plus                  | Advanced         |
| Max Users        | Up to 40                        | 3 + 2 Acct                       | 5 + 2 Acct            | 25 + 3 Acct      |
| Licensing        | Unlimited companies per license | One company per subscription     |                       |                  |
| Access           | Specific devices, wired LAN     | Any internet connected device    |                       |                  |
| User controls    | Robust                          | Limited                          | Limited               | Improving        |
| New features     | Ongoing                         | Ongoing                          |                       |                  |
| Inventory        | Advanced                        | N/A                              | Simple                | Better           |
| Bank Feeds       | Improved, requires user action  | Better, daily background updates |                       |                  |
| Segment tracking | Class                           | None                             | Class + Location (40) | Class + Location |
| Reporting        | Mature, some add-ons            | Limited, improving add-ons       |                       |                  |



# Software Price

| Annual Price   | QB Desktop |                    | QB Online        |                    |                     |
|--|------------|--------------------|------------------|--------------------|---------------------|
|  | Enterprise |                    | Essentials       | Plus               | Advanced            |
| QBES: from Silver to Diamond MSRP; Gold and Platinum levels in between | 1          | \$1,410 - \$4,440  | \$780<br>3 users | \$1,188<br>5 users | \$2,820<br>25 users |
|  | 5          | \$4,118 - \$7,428  |                  |                    |                     |
|  | 10         | \$6,325 - \$9,732  |                  |                    |                     |
|  | 30         | \$9,266 - \$12,804 |                  |                    |                     |
| QBO at MSRP  | 40         | \$16,332           |                  |                    |                     |





# Standard Workflow



# Expense setup

From Expense settings

Needed to track costs by Job

Setup Items to be used on Purchase transactions

## Account and Settings

Company

Usage

Sales

Expenses

Time

Advanced

## Expenses

### Bills and expenses

Show Items table on expense and purchase forms

Show Tags field on expense and purchase forms

Track expenses and items by customer

Make expenses and items billable

Markup with a default rate of 0.00 %

Track billable expenses and items as income

In a single account

In multiple accounts

Charge sales tax

Default bill payment terms

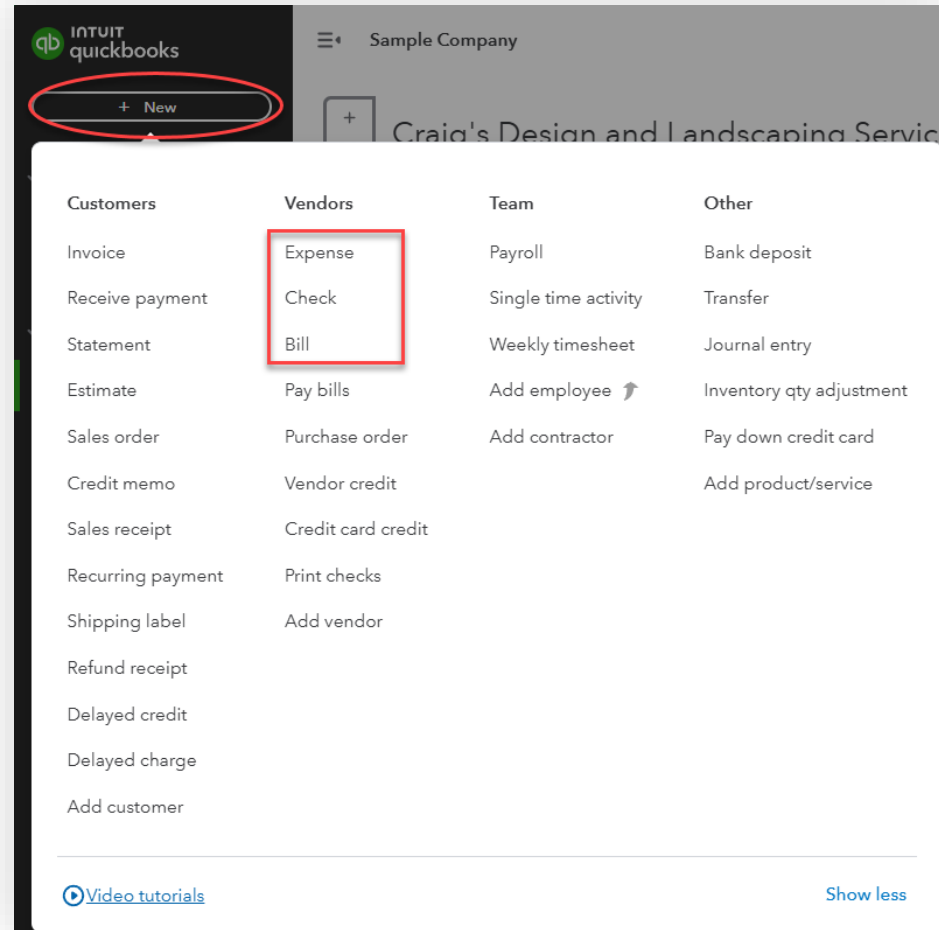
Enter Text

Cancel

Save



# Record Expenses

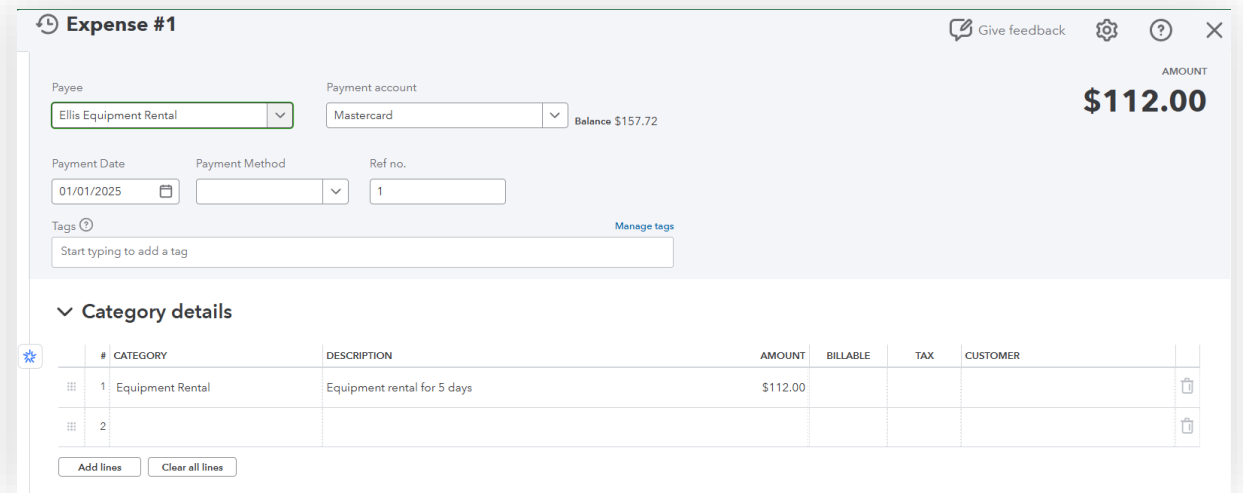


INTUIT quickbooks Sample Company

+ New

| Customers         | Vendors            | Team                 | Other                    |
|-------------------|--------------------|----------------------|--------------------------|
| Invoice           | Expense            | Payroll              | Bank deposit             |
| Receive payment   | Check              | Single time activity | Transfer                 |
| Statement         | Bill               | Weekly timesheet     | Journal entry            |
| Estimate          | Pay bills          | Add employee ↗       | Inventory qty adjustment |
| Sales order       | Purchase order     | Add contractor       | Pay down credit card     |
| Credit memo       | Vendor credit      |                      | Add product/service      |
| Sales receipt     | Credit card credit |                      |                          |
| Recurring payment | Print checks       |                      |                          |
| Shipping label    | Add vendor         |                      |                          |
| Refund receipt    |                    |                      |                          |
| Delayed credit    |                    |                      |                          |
| Delayed charge    |                    |                      |                          |
| Add customer      |                    |                      |                          |

[Video tutorials](#) [Show less](#)



Expense #1

Payee: Ellis Equipment Rental Payment account: Mastercard Balance \$157.72

AMOUNT: **\$112.00**

Payment Date: 01/01/2025 Payment Method: Ref no.: 1

Tags: Start typing to add a tag

Category details

| # | CATEGORY         | DESCRIPTION                 | AMOUNT   | BILLABLE | TAX | CUSTOMER |
|---|------------------|-----------------------------|----------|----------|-----|----------|
| 1 | Equipment Rental | Equipment rental for 5 days | \$112.00 |          |     |          |
| 2 |                  |                             |          |          |     |          |

Add lines Clear all lines



# Estimates

- Activate "Progress Invoicing" from Sales settings
- Allows multiple invoices from a single estimate
- Used for projects billed in stages or phases

## Account and Settings

|              |                       |   |
|--------------|-----------------------|---|
| Company      | Tags                  | On  |
| Usage        | Products and services | Show Product/Service column on sales forms<br>On  |
| <b>Sales</b> |                       | Show SKU column<br>Off  |
| Expenses     |                       | Turn on <a href="#">price rules</a> <b>BETA</b><br>Off  |
| Time         |                       | Track quantity and price/rate<br>On   |
| Advanced     |                       | Track inventory quantity on hand<br>On  |
|              | Late fees             | Default charge applied to overdue invoices<br>Off   |
|              |                       | Appears as a line under <b>Product/Service</b> on the invoice,<br>and applies to all customers. |
|              | Progress Invoicing    | Create multiple partial invoices from a single estimate <input checked="" type="checkbox"/>     |
|              |                       | <input type="button" value="Cancel"/> <input type="button" value="Save"/>                       |



# Record Sales

The screenshot shows the Intuit QuickBooks interface. At the top left, the '+ New' button is circled in red. Below it, a dropdown menu is open, displaying various transaction types. Three items are highlighted with red boxes: 'Invoice' in the Customers column, 'Bank deposit' in the Other column, and 'Sales receipt' in the Customers column.

| Customers         | Vendors            | Team                 | Other                    |
|-------------------|--------------------|----------------------|--------------------------|
| Invoice           | Expense            | Payroll              | Bank deposit             |
| Receive payment   | Check              | Single time activity | Transfer                 |
| Statement         | Bill               | Weekly timesheet     | Journal entry            |
| Estimate          | Pay bills          | Add employee         | Inventory qty adjustment |
| Sales order       | Purchase order     | Add contractor       | Pay down credit card     |
| Credit memo       | Vendor credit      |                      | Add product/service      |
| Sales receipt     | Credit card credit |                      |                          |
| Recurring payment | Print checks       |                      |                          |
| Shipping label    | Add vendor         |                      |                          |
| Refund receipt    |                    |                      |                          |
| Delayed credit    |                    |                      |                          |
| Delayed charge    |                    |                      |                          |
| Add customer      |                    |                      |                          |

The screenshot shows the 'Invoice #1032' form in Intuit QuickBooks. The form includes fields for Customer (Travis Waldron), Customer email (Travis@Waldron.com), Billing address (Travis Waldron, 78 First St., Menlo Park, CA 94304), Terms (Net 30), Invoice date (12/31/2024), and Due date (01/30/2025). A table lists the invoice items, and the subtotal is \$384.00. The balance due is \$414.72. The form also includes a 'Receive payment' button and a 'Message on invoice' field.

**Customer:** Travis Waldron  
**Customer email:** Travis@Waldron.com  
**Billing address:** Travis Waldron, 78 First St., Menlo Park, CA 94304  
**Terms:** Net 30  
**Invoice date:** 12/31/2024  
**Due date:** 01/30/2025

| # | PRODUCT/SERVICE | DESCRIPTION  | QTY | RATE | AMOUNT | TAX |
|---|-----------------|--------------|-----|------|--------|-----|
| 1 | Landscaping:Sod | Sod          | 20  | 15   | 300.00 | ✓   |
| 2 | Design:Rocks    | Garden Rocks | 7   | 12   | 84.00  | ✓   |
| 3 |                 |              |     |      |        |     |

**Subtotal:** \$384.00  
**BALANCE DUE:** \$414.72



# Banking

Sample Company Business Feed Contact experts Help Search Notifications Settings Profile

## Bank transactions

Bank transactions | App transactions | Receipts | Reconcile | Rules | Chart of accounts | Recurring transactions

**Checking** Link account Update Explore

**Checking**  
-\$3,621.93  
BANK BALANCE Updated moments ago  
\$1,201.00  
IN QUICKBOOKS **25**

**Savings**  
\$200.00  
BANK BALANCE Updated moments ago  
\$800.00  
IN QUICKBOOKS **1**

**Mastercard**  
\$304.96  
BANK BALANCE Updated moments ago  
\$157.72  
IN QUICKBOOKS **7**

**For review (25)** | Categorized | Excluded Video tutorials Take a tour Go to bank register

All dates All transactions (...)

1-25 of 25 1 Print Copy Settings

| <input type="checkbox"/> | DATE ▾     | DESCRIPTION     | PAYEE           | CATEGORIZE OR MATCH  | SPENT | RECEIVED |  | ACTION              |
|--------------------------|------------|-----------------|-----------------|----------------------|-------|----------|--|---------------------|
| <input type="checkbox"/> | 02/28/2025 | Books By Bessie | Books by Bessie | Uncategorized Income |       | \$55.00  |  | <a href="#">Add</a> |
| <input type="checkbox"/> | 01/29/2025 | A Rental        |                 | Uncategorized Income |       | \$200.00 |  | <a href="#">Add</a> |



# Reporting

INTUIT quickbooks

+ New

BOOKMARKS

- Bank transactions
- Bookmark this page

MENU

- Dashboards
- Transactions
- Sales
- Expenses
- Customers & leads
- Reports**
- Payroll
- Time
- Budgets
- Taxes
- My accountant
- Lending & banking

Sample Company

Business Feed

Contact experts

Help

Find report by name

## Reports

Standard | Custom reports | Management reports

### Favorites

- Accounts receivable aging summary
- Balance Sheet
- Profit and Loss

### Business overview

|                          |                              |
|--------------------------|------------------------------|
| Audit Log                | Profit and Loss by Customer  |
| Balance Sheet            | Profit and Loss by Month     |
| Balance Sheet Comparison | Profit and Loss by Tag Group |
| Balance Sheet Detail     | Profit and Loss Comparison   |



[Back to report list](#)

## Profit and Loss Report

Report period

Last Month

12/01/2024

to

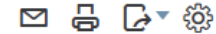
12/31/2024

Switch to modern view

Customize

Save customization

Expand Sort Add notes Edit titles



### Craig's Design and Landscaping Services

**Profit and Loss**  
December 2024

|                         | TOTAL             |
|-------------------------|-------------------|
| Income                  |                   |
| Design income           | 1,312.50          |
| Discounts given         | -30.50            |
| Landscaping Services    | 3,384.72          |
| Pest Control Services   | -100.00           |
| Sales of Product Income | 44.00             |
| Services                | 503.55            |
| <b>Total Income</b>     | <b>\$5,114.27</b> |
| <b>GROSS PROFIT</b>     | <b>\$5,114.27</b> |
| Expenses                |                   |
| Automobile              | 137.13            |
| Insurance               | 241.23            |
| Job Expenses            | 489.75            |





# Project App + QuickBooks

1. Enhance functionality with contractor-specific features like pay apps, change order management, RFIs, contractor-specific reports
2. Limit access to accounting/business data
3. Connect the office and the field
4. Digitize your business to increase productivity



# QBO Add-Ons



QB Time



Clock Shark





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# Questions?

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# Thank you for attending!

VISIT OUR BOOTH FOR MORE DETAILS  
COME TO [QB FOR LANDSCAPERS 102](#) AT 2:45PM