



**SIEGEL SOLUTIONS**  
CLIENT DRIVEN SOLUTIONS

# QuickBooks Online for Landscapers 102

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

Deep dive into special features for landscapers:

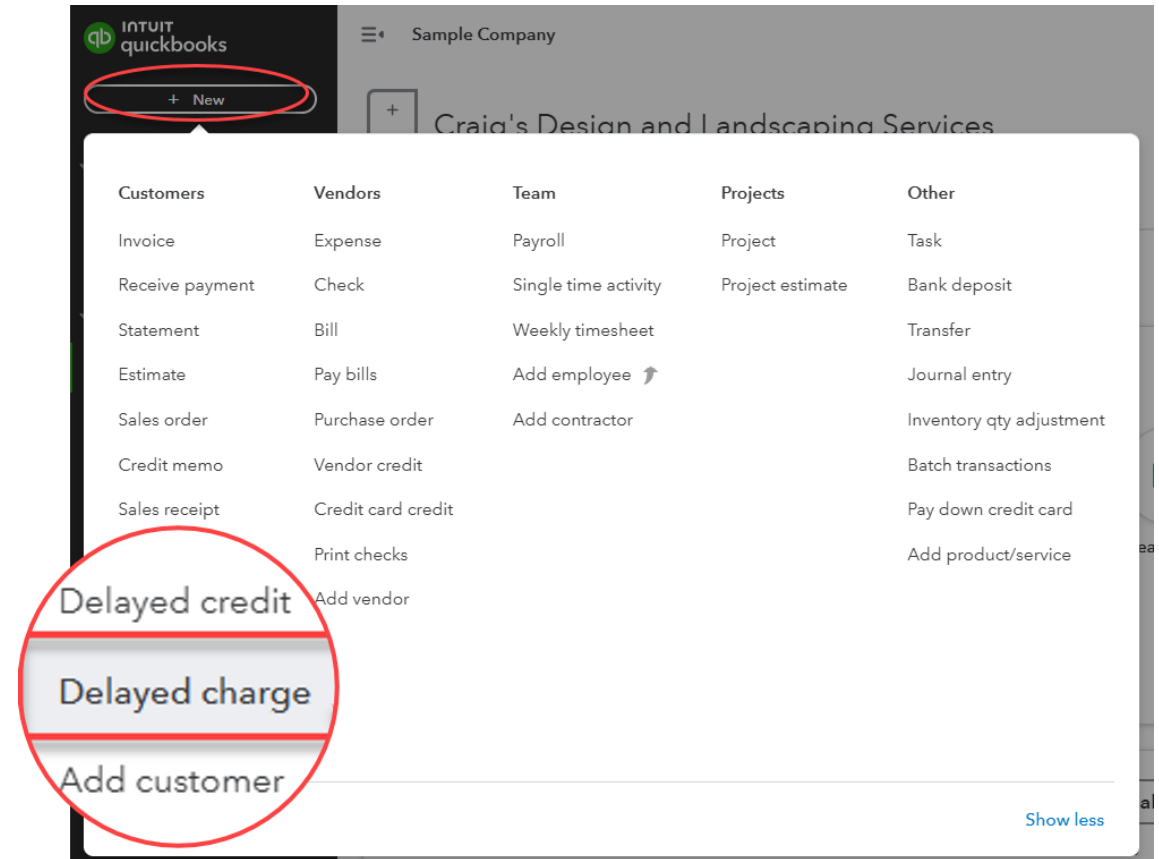
- Delayed charges
- Estimating
- Progress Billing
- Job center
- Job Cost for Labor



# Delayed charges

Sets a reminder to invoice later

Useful for maintenance work



# Estimates and Progress Billing

Activate in Sales settings

Sets up a project budget

Link multiple invoices to budget

Useful for annual contracts

## Account and Settings

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



# Project Center

Activate in Advanced Settings

Opens the Project Center

- Project-specific reports
- Project profitability
- Unbilled expenses
- Job Labor allocation

Critical for Job Management

## Account and Settings

Company	Unbilled expense income account	Unbilled Expense income
Usage	Categories	Track classes <input type="checkbox"/> Off
Sales		Track locations <input type="checkbox"/> Off
Expenses	Automation	Pre-fill forms with previously entered content <input type="checkbox"/> On
Time		Automatically apply credits <input type="checkbox"/> On
Advanced		Automatically invoice unbilled activity <input type="checkbox"/> Off
		Automatically apply bill payments <input type="checkbox"/> On
	<b>Projects</b>	Organize all job-related activity in one place <input checked="" type="checkbox"/> <input type="checkbox"/>
		<input type="button" value="Cancel"/> <input type="button" value="Save"/>
	Currency	Home Currency <input type="checkbox"/> United States Dollar
		Multicurrency <input type="checkbox"/> Off

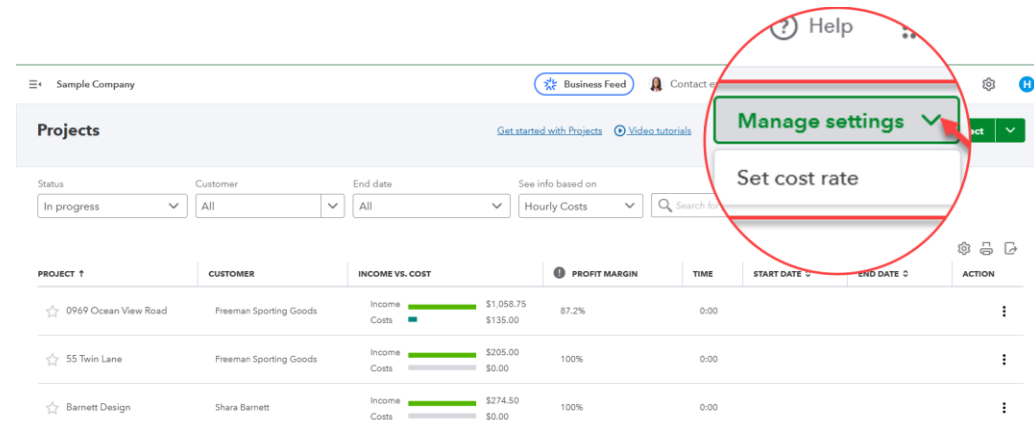


# Job Cost for Labor

Allocate the cost of labor to jobs using a timesheet

Needed to show job profitability

Uses Intuit payroll or labor cost



The screenshot displays a software interface for managing projects. A red circle highlights the 'Manage settings' and 'Set cost rate' options in the top right corner. Below the navigation bar, there are filters for 'Status' (In progress), 'Customer' (All), and 'End date' (All). A table lists projects with columns for 'PROJECT #', 'CUSTOMER', 'INCOME VS. COST', 'PROFIT MARGIN', 'TIME', 'START DATE', 'END DATE', and 'ACTION'.

PROJECT #	CUSTOMER	INCOME VS. COST	PROFIT MARGIN	TIME	START DATE	END DATE	ACTION
☆ 0969 Ocean View Road	Freeman Sporting Goods	Income: \$1,058.75 Costs: \$135.00	87.2%	0.00			⋮
☆ 55 Twin Lane	Freeman Sporting Goods	Income: \$205.00 Costs: \$0.00	100%	0.00			⋮
☆ Barnett Design	Shara Barnett	Income: \$274.50 Costs: \$0.00	100%	0.00			⋮








# Enter Cost Rate for each worker

Employee hourly rate ×

Include the total of **wages, taxes, and overhead** for each worker.  
*This is not your billable rate.*

EMPLOYEE	COST RATE	
Emily Platt	\$85.31/hr	
John Johnson	\$85.31/hr	



Projects

See info based on

Status: In progress  Customer: All  End date: All

PROJECT ↑ | CUSTOMER | INCOME VS. COST

Hourly Costs

Hourly Costs

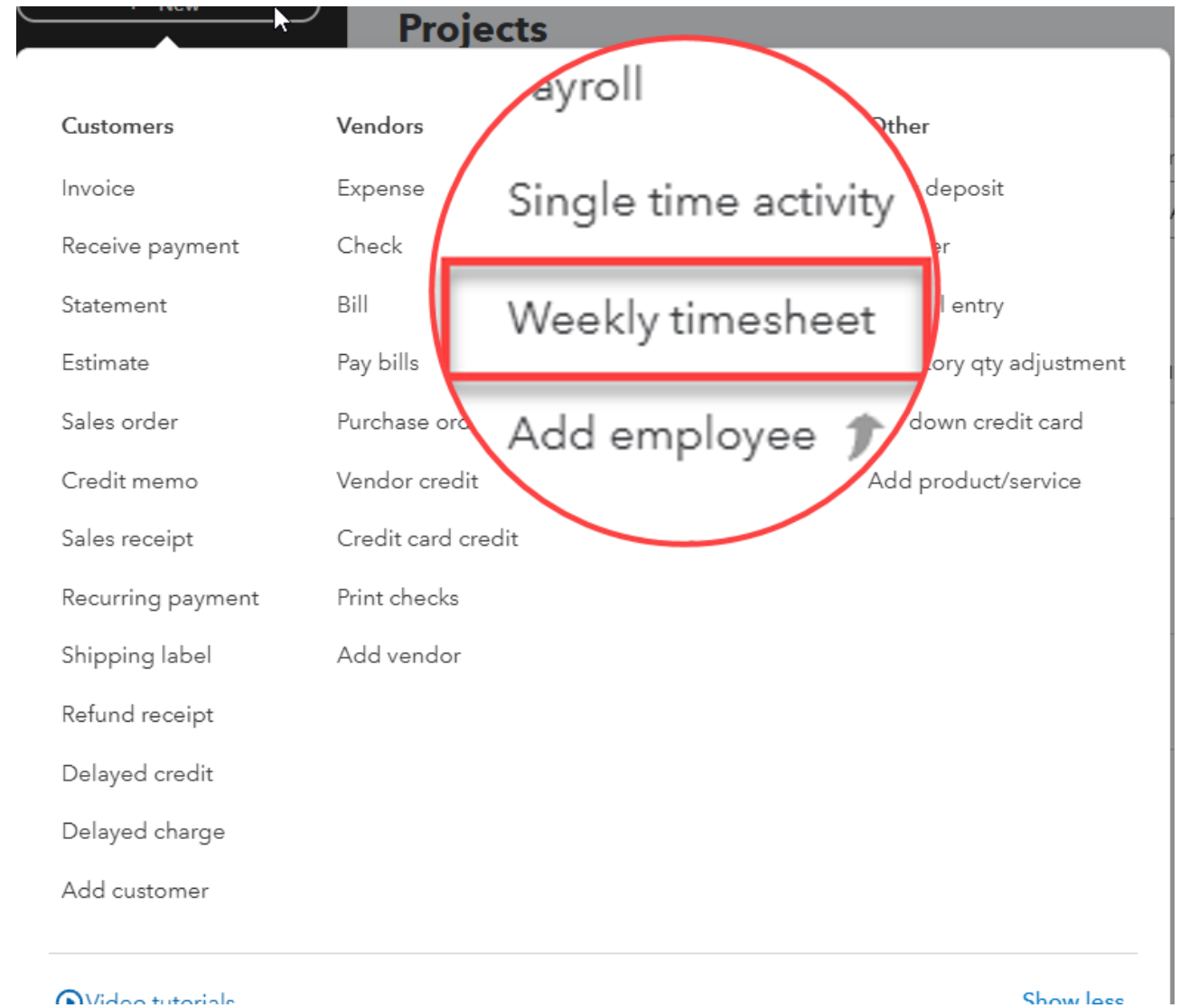
Payroll Expenses



# Enter Timesheet from menu or App

## Time sheet apps:

- QB Time (Intuit)
- ClockShark
- Time Tracker (eBillity)



# Enter time sheet

Weekly Timesheet ⚙️ ? Help ✕

Emily Platt 2/3/2025 to 2/9/2025 TOTAL HOURS 38:00

Enter Project Name, Service Item, and Notes

#	DETAILS	TUE 4	WED 5	THU 6	FRI 7	SAT 8	SUN 9	TOTAL
1	<p>Freeman Sporting Goods: <span>▼</span></p> <p>Design:Design <span>▼</span></p> <p>Custom Design work on-site</p> <p><input type="checkbox"/> Billable (/hr)</p>	8:00	4:00					<p>Cost \$1,023.72</p> <p>Hrs 12:00 <span>🗑️</span></p>
2	<p>Freeman Sporting Goods: <span>▼</span></p> <p>Landscaping:Installation <span>▼</span></p> <p>Installation of landscape design</p> <p><input type="checkbox"/> Billable (/hr)</p>		4:00	8:00	8:00			<p>Cost \$1,706.20</p> <p>Hrs 20:00 <span>🗑️</span></p>
3	<p>Shara Barnett:Barnett Des <span>▼</span></p> <p>Landscaping:Gardening <span>▼</span></p> <p>Weekly Gardening Service</p> <p><input type="checkbox"/> Billable (/hr)</p>				6:00			<p>Cost \$511.86</p> <p>Hrs 6:00 <span>🗑️</span></p>

Cancel Copy last timesheet Save Save and new ▼



# 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 App Store

qb INTUIT quickbooks    Apps    Deals             Sign in    Try QuickBooks for free

**COLLECTIONS** ▾

**CATEGORIES** ▾

**INDUSTRIES** ▲

- Accounting
- Administration
- Agriculture
- Construction**
- Education
- Energy & materials
- Entertainment
- Enterprise management
- Finance
- Health
- Hospitality
- Manufacturing
- Professional services
- Public administration
- Real estate
- Retail
- Technology
- Transportation
- Utilities

## Construction Filters

 <b>Dext</b> ✓ Trust Dext, 700K+ clients. Fetch receipts, invoices, Amazon, bank data. Try free ★★★★☆ (557)	 <b>QuickBooks Time</b> Simplify payroll and invoicing with QuickBooks Time ★★★★☆ (12720)	 <b>Quotient</b> Online estimating and proposal software ★★★★☆ (84)
 <b>JobTread</b> Construction CRM, Estimating, Job Costing, Invoicing, and Project Management ★★★★☆ (92)	 <b>NiceJob</b> Marketing platform designed to help you collect reviews & boost your reputation. ★★★★☆ (80)	 <b>Knowify - Construction Project Management</b> ✓ Tools for trade contractors: Manage every project and service job in one place ★★★★☆ (92)
 <b>Houzz Pro</b> Project management & marketing software for construction & design professionals ★★★★☆ (122)	 <b>SynkedUP</b> Know Your Numbers ★★★★☆ (27)	 <b>Sage Construction Management</b> Construction software suite to track leads and awarded projects ★★★★☆ (55)



# QBO Add-on's for Landscapers



QB Time



Clock  
Shark





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# Questions?



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# Thank You for Attending...

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