

APPOINTMENT-BASED

RETAIL AND eCOMMERCE

PROFESSIONAL AND FIELD SERVICES



Professional and Field Services Businesses

AND THE ADVANTAGES OF MOVING ONLINE



Find out which QuickBooks® Online features are tailored to the needs of your professional and field services clients.

Do you have professional and field services clients?

These are clients who:

- Get paid by the project, job or gig
- Work on projects of varying lengths
- Incur costs and expenses up front

Common professional and field services businesses include:

- Consultants
- Photographers
- Architects
- Entertainers
- Wedding planners
- Interior designers
- Caterers
- Landscapers
- General contractors
- Lawyers

BUSINESSES THAT GET PAID BY THE PROJECT OR JOB HAVE UNIQUE ACCOUNTING NEEDS—YOU CAN HELP.

Your professional and field services clients are looking for:

How QuickBooks Online can help:



Quick solutions for keeping cash flow and invoicing up to date

Staying on top of cash flow is essential for these types of businesses, because they often incur expenses up front, before they receive payment.

✓ **Easily monitor cash flow**

Clients will have a clearer picture of each project’s profitability thanks to one-click access to critical reports, including Profit & Loss, Balance Sheet and dozens more. Tag expenses by customer job. Perform time tracking in QuickBooks Online Plus.

✓ **Create custom invoices fast**

Clients can build professional-looking invoices quickly and easily, featuring their company’s branding. With QuickBooks Online Essentials or Plus versions, clients can copy estimates to invoices.

✓ **Spend less time entering data**

Clients can spend more time focused on their projects by syncing their bank with QuickBooks Online, which automatically downloads, categorizes and reconciles transactions.¹

✓ **Set up recurring invoices**

Clients can keep invoicing up to date by letting QuickBooks Online generate monthly invoices for customers using the same services each month. Delayed charges and credits help keep track of work that is going to be billed later.



Clear and accurate ways to track profitability by job

Time tracking and job costing are essential to ensure the profitability of any business. This holds especially true for these clients, who must spread limited resources—including their time—across various jobs.

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✓ **Know where they stand**

Clients will have all the information they need to make smart decisions and prepare for tax time with financial reports that help them analyze their sales, track their profits and much more. With QuickBooks Payments, clients can get paid twice as fast and communicate with customers directly on the invoice.²

✓ **Stay on top of expenses**

Clients can easily record expenses, helping them control spending per job, and making tax time easy. They can even use their phones to photograph and save receipts while in the field.

✓ **Plan smarter**

Clients can do job costing and streamline quote creation and payroll by integrating with apps, ensuring that each project is profitable from beginning to end.

Your professional and field services clients are looking for:



Easy, immediate access to their books from anywhere

These clients are always on the run or in the field, which means they don't have a lot of time for bookkeeping. They need solutions that let them stay on top of their books, wherever their projects take them.

How QuickBooks Online can help:

✓ **Access books quickly and easily**

Even on their busiest days, clients can stay on top of their books with anytime, anywhere access from their iPhone, iPad, Android device or browser.³

✓ **Connect their most-used apps**

Clients can sync, link and import data from apps they already use, such as PayPal, American Express and Square, ensuring that their data is accurate and up to date throughout the life of a project.

✓ **Work seamlessly with teams**

Clients and their teams always have access to the most secure, up-to-date information with files that sync to allow for simultaneous use, wherever they are.

Meet the unique needs of professional and field services businesses with the right accounting tools for better financial management and greater efficiency.

For professional and field services businesses with job costing and construction management needs, apps like Knowify and BuilderTREND are powerfully useful.

These businesses can build a custom accounting solution by running specialized apps alongside QuickBooks Online.



Knowify

Field services businesses will benefit from this app's powerful job costing, bid and contract management, change order management (with built-in eSignature capture), scheduling, classic and AIA-style invoicing, and more. Learn more at intuitaccountants.com/knowify.



BuilderTREND

End-to-end construction management, with easy-to-use scheduling and production tools, and more. Learn more at bit.ly/buildertrend.

Professional and field services businesses also favor these tailor-made apps to enhance their QuickBooks Online experience:



TSheets

Track hourly employees and simplify payroll, invoicing and job costing. Learn more at intuitaccountants.com/tsheets.



Practice Ignition

Create beautiful proposals, accept payments and manage leads. Learn more at intuitaccountants.com/practice.



Mavenlink

Increase productivity with this project management solution, which enables collaboration between team members. Learn more at intuitaccountants.com/maven.



Fathom

Create insightful dashboard and performance reports. Learn more at bit.ly/fathomapp.



Method:CRM

Keep customer follow-ups and history all in one place with the top-rated CRM built for QuickBooks. Learn more at intuitaccountants.com/method.

Want to know more?

Download *The Accountant's Complete Guide to Moving Clients Online*.

Part 1



Why choose online?

intuitaccountants.com/online

Part 2



How to convert QuickBooks Desktop data to QuickBooks Online

intuitaccountants.com/convert

Part 3



Resources to help clients optimize their move online

intuitaccountants.com/optimize

Ready to help a client make the move?

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¹ Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions, and fees.

² QuickBooks Online customers getting paid online with QuickBooks Payments get paid twice as fast.

³ QuickBooks Online requires a computer with a supported Internet browser (see System Requirements for a list of supported browsers) and an Internet connection (a high-speed connection is recommended). The QuickBooks Online mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Online mobile access is included with your QuickBooks Online subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.