LANDSCAPT · INVOICING & PAYMENTS

From completed visit to money in the bank, without retyping a thing

Invoices draft themselves from finished work, contracts and packages bill on schedule, clients pay online by card or bank transfer, and every payment lands against the right invoice and flows to QuickBooks.

1 · Complete	2 · Draft	3 · Send	4 · Pay	5 · Apply	6 · Books
Crew finishes the visit	Invoice builds itself	Email or print, with a pay link	Card, bank, portal, autopay	Balance and status update	Synced to QuickBooks

1. Invoices that draft themselves

Finish the work and the bill is already waiting for a look

- **Completed visits become draft invoices** with one line per service. Set a rate and quantity on a visit and that is what bills. Materials the crew marked as used ride along on the same invoice, and materials marked "used, not billed" are left off.
- **Your client's billing rhythm decides the grouping:** one invoice per visit, per day, per week, or per month. A monthly client's draft collects the whole month's visits and is dated the last day of the month, so it never shows past due before the month is over.
- **Tax follows the work.** Jobs converted from an estimate carry that estimate's tax; other jobs use the client's rate. Tax-exempt clients are never taxed, and tax is figured after any discount.
- **Safe by design:** a visit that is already invoiced shows "View Invoice" instead of creating a second one. Voiding an invoice releases its visits and materials so they can be billed again.
- Invoice numbers count up on their own. Switching from another system? Set the next number once and new invoices continue from there.

2. Contracts and packages

Fixed pricing that bills on schedule, with no double-billing

- **Contract billing** runs daily: an active contract with auto-generate on is invoiced on its billing day of the month. Choose **weekly, every two weeks, monthly, quarterly, annual, or one-time**, and optionally bill a month in advance.
- **Seasonal pricing:** monthly contracts have a twelve-month grid, so winter months can bill a different amount, or nothing at all. Each invoice carries the contract's PO number.
- **Mid-cycle starts** either begin at the first full cycle or **prorate** the partial first period on its own invoice. A contract signed late can bill every missed cycle on one catch-up invoice.
- **Each contract bills once per period**, however many times you press Create Invoices. Editing a signed contract's terms raises a "needs client approval" flag while billing carries on.
- **Packages** (for example a multi-step fertilizer program) bill each step at its share of the program. Packages under a contract are covered by the contract's price and never invoiced twice; packages without a contract bill on the client's invoice rhythm.
- **Projects** bill by milestone: percentages of the contract price, invoiced one at a time, with approved change orders re-spreading only the milestones not yet billed. Snow work bills through its own storm-based invoicing.

3. Review, send, and print

Your invoices, your branding, a pay link on every one

- **Edit before it goes out:** reorder lines by dragging, add standard other charges (late fee, trip charge, fuel surcharge) as a fixed amount or a percent, and apply a charge to many invoices at once.
- **Hide clutter from the customer:** tuck dump runs or add-ons into the service line above them. The total never changes and your own screen still shows every line.
- **Invoice templates and email wording** are built in the same editor. Optionally add a chemical application record page or the crew's completion notes, and attach up to 12 before-and-after photos to the PDF and the online invoice.
- Email goes to the client's billing address with billing contacts copied. Bounced addresses are skipped and the real reason is shown if a send fails. **Print Selected** combines many invoices into one PDF.
- **Emailing locks the invoice** so the client's copy can't be edited underneath them. Sent invoices carry a **View & Pay Online** link, and if one goes to the wrong person you can revoke it in a click.
- **Merge** invoices for one client, or **consolidate** sub-account invoices onto a property manager's account, with each line tagged by property.

4. Getting paid online

Card and bank transfer through your own Stripe account

- Connect your **Stripe account** from Settings, an existing one or a new one. Payments are charged to your account and land with you. Bank transfer (ACH) is a separate switch you turn on.
- **Four ways to pay:** the client portal, a no-login pay link on every emailed invoice, a team member charging a card from the invoice, or autopay.
- **Saved methods and autopay:** clients keep a card or bank account on file. Autopay is the client's own choice and starts off. The To Charge queue lets you charge one invoice or run **Charge All**, with a confirmation first, and skips anything already in flight so nothing charges twice.
- **Optional card fee:** off by default. If you turn it on, you set the rate and the threshold, can choose to cover the card fee exactly, and can waive it on any single charge. Debit cards and bank transfers are never surcharged.
- **Already on Stripe?** Import the cards your customers already saved. Autopay stays off on imported cards until you turn it on.
- Proposal deposits can be taken by card when a client accepts an estimate, and are applied automatically to that estimate's invoice when it is issued.

5. Your clients' portal

A branded, self-serve site, separate from your staff login

What clients can do

- See every invoice, outstanding and history, with a PDF of each
- Pay one, several, or all at once by card or bank transfer
- Pay ahead with a prepayment that settles the next invoice
- Save, update, or remove a payment method and switch autopay on
- Review and accept estimates with an e-signature

What you control

- Invite-only access, by email, from the client record
- Your company name, color, logo, and support contacts
- Switch estimates, tickets, and documents on or off
- Property managers see and pay their sub-accounts together
- Drafts, crew notes, and costs are never shown

6. Payments, credits, and refunds

Every dollar is applied to the right invoice, and the books stay honest

Situation	What happens
One check, several invoices	Record a single payment and split it across any of the client's open invoices.
Overpayment or prepayment	The extra stays on the client as credit, and a prompt on their next invoice offers Apply with one click. Client credit is used before a card is charged.
Partial payment	The invoice moves to Partial and shows what is left, then to Paid when the balance reaches zero.
Refund	Card and bank refunds go back through Stripe. Unused credit is refunded first so a paid invoice isn't reopened needlessly.
Bad debt	Write off a balance without counting it as cash collected.
Chargeback	The invoice is flagged and held out of the charge queues until the dispute closes.
Paid twice	Only what is still owed is applied. The rest becomes credit, never a double entry.

Real-time status. Invoices move from Draft to Sent, Viewed, Partial, and Paid on their own, with Overdue shown once the due date passes. Past-due and paid events can trigger your automations, such as a reminder email. Only issued invoices count in revenue and receivables reports, so a draft is never counted as money earned.

7. Statements and receivables

Know who owes what, and send them the proof

- **Account statements** show a running balance for any date range, with or without line detail, an optional message, and a minimum-balance filter. Print one, email one, or email many clients' statements at once.
- Each client's balance, credits, and prepayments are visible on the invoice list. Filter by status, date, balance, and payment type, and bulk-email, print, or charge from there.
- Payments are reported net of refunds, and write-offs and applied credits stay out of cash collected.

8. QuickBooks Online sync

Enter it once, and your books stay current

- Connect QuickBooks Online in one click from Settings. Customers, invoices, and payments, including refunds, voids, and edits, are sent as they happen, with a safety-net check every 15 minutes.
- Invoices keep the same number, terms, and due date. Clients are matched to your existing QuickBooks customers, and when names are only similar you pick the match rather than getting a duplicate.
- A **Sync Status** panel lists anything that didn't go through, with the reason and a Retry button. Only new records after you connect are sent, so nothing you entered by hand is duplicated.

Good to know: the sync is one-way, from Landscapt to QuickBooks, so make invoice and payment changes in Landscapt. It connects to QuickBooks Online (not Desktop). Synced invoices are voided rather than deleted so both systems stay in agreement.

9. Setup & control

Configured to how your company bills

What you configure

- Sales tax rate, with an option to update existing clients
- Invoice templates, email wording, and other charges
- Payment terms and invoice frequency per client
- Stripe, bank transfer, and the optional card fee
- Portal branding and QuickBooks connection

Control and audit

- Role-based permissions for invoicing, payments, and settings
- Balances change only through payment tools, never by hand-editing
- Void is final, with Duplicate as draft to bill again
- Audit trail and client timeline entries for payments and changes

Landscapt is a cloud platform for landscape and field-service operations, with CRM, scheduling, invoicing, purchasing, and maintenance in one system. Ask us for a live walkthrough using your own clients and contracts.