

INSTRUCTIONS

Use invoicing as a final upsell opportunity.

Add a product/service using QuickBooks Online to add a promotion to your winterizing invoice to give homeowners one last chance to sign up.

How to use this tool:

1. If you have never used the “products” feature in QuickBooks Online, [access this tutorial to learn how.](#)
2. In QuickBooks Online, use the “Add a Product/Service” page (see below) to quickly add services or promotions to each invoice.
 - a. Set up a service/product as a shortcut to include an offer on invoices.

Product/Service information ✕

Service [Change type](#)

Name*

SKU

Category

Sales information

Sales price/rate **Income account**

Save and close

Products and Services

Dashboard | All Sales | Invoices | Customers | **Products and Services**

Products and Services
4 All List

NAME	SKU	TYPE	SALES DESCRIPTION
Promotions			
Rachio Winter Promo	PROMO-Rachio	Service	Save Now to Save Later: S...
Sales		Service	

Product/Service information ✕

Service [Change type](#)

Name*

SKU

Category

Sales information

Sales price/rate **Income account**

Save and close



3. For inspiration, here are a few sample services you could create to add onto every winterization invoice you send

	1	2	3
Product or Service?	Service	Service	Service
Name	Spring Activation Promo	Spring Activation Promo	Rachio Winter Promo
SKU	PROMO-Activation		PROMO-Rachio
Description on sales forms	Plan ahead for Spring: schedule your sprinkler activation before October 31 and Save \$30!	Protect your landscape investment: sign up for our annual maintenance plan by October 31 and save \$50!	Save Now to Save Later: Schedule your Rachio Smart Sprinkler Controller install for this winter and save \$100 on the install and save water in the spring!
Price (on sales forms)	0.00	0.00	0.00
Income Account	Promotions	Promotions	Promotions
Is Taxable	No	No	No

