



r/ProHVACR • 28 days ago

Ok\_Firefighter2257



## How do you go about invoicing and paperwork as an HVAC business owner?

Business

Hi Guys! I'm about to start my own HVAC Business, just got my license and all. I worked 8 years as a technician previously and got a pretty good set of customers to start with

I hear a lot from podcasts and other owners that paperwork and invoicing is stressful and i've got a clue as to how it works, but i'm far from an expert as I was never involved directly in that side of operations at my previous job and could definitely learn from you guys.

Can you guys share how you go about your paperwork and invoicing? Just want to get an idea of how I can run mine and what systems i should be using

9

19



Share

### Post Insights

Only the post author and moderators can see this

**3.8K**

Total Views

**100%**

Upvote Rate

**19**

Comments

**9**

Total Shares

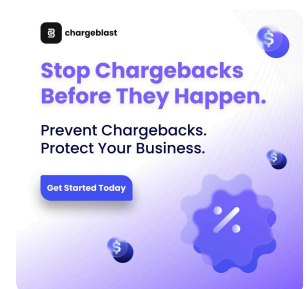
### Hourly views for first 48 hours



get\_Chargeblast • Promoted



Imagine having a 0% Dispute rate. It's possible with Chargeblast.

[Learn More](#)[chargeblast.com](https://chargeblast.com)



Sort by: Best ▾

**ThadJarvis987** • 28d ago

Quickbooks

10 Reply ...

**sanilschandran** • 20d ago

I would be so reluctant to recommend Quickbooks. They charge a lot more than every other invoicing software for transactions.

1 Reply ...

**Valuable-Bee4972** • 28d ago

Get a service based app like housecall pro, jobber, tradify and then integrate with your quickbooks online. We invoice and receive payments through quickbooks.

5 Reply ...

**atypicallemon** • 28d ago

This is my setup and works pretty well. Get your app that integrates with QuickBooks. It makes life so much easier. Just have to verify or adjust every once in a while.

2 Reply ...

**deten** • 28d ago

I am also interested. My current system is in excel and it works fine, I quote and invoice from the same document, but I have to manually enter tax rates, mark up parts and keep track of quick of my quotes turn into purchase orders.

4 Reply ...

**Randominterests2019** • 27d ago

Can you paste a copy of it for reference?

1 Reply ...

**Murky-Perceptions** • 28d ago



Its been 8yrs, I'm doing very good but have had to learn alot still.

Advise:

- 1)find a mentor or 2, learn from their wins /losses.
- 2)link up with a good supplier & take all their trainings, get in with tech support, office staff etc.
- 3)don't grow to fast you should focus on quality not quantity.
- 4)know your book keeping #'s (P&L) @ all times.
- 5)only hire when necessary & make all expectations/ wages, beni's & bonuses clear from day 1.
- 6) learn the industry good, bad & ugly. Learn about up-selling, corp buyout Co's & garbage practices so you know what not to do but use sales, tech and honest practices to your advantage.
- 6.5) GOOD LUCK!!! Your 9-5 is now a 5-9 but you're going to live Your dreams not someone else's!

⊖ ↑ 3 ↓ ○ Reply ...



**Parachuter-** • 28d ago

Agreed, get with a supply house that will invest in your business with training seminars. A good distributor wants you to be successful because they want you to be successful and grow your business, in turn they sell more product. Not to mention if you run your business successfully the distributor won't be on the hook if you can't pay them. Also get with a payroll service that takes care of your taxes. I know a handful of guys over the years that thought all that money in their bank account was theirs. You have to share with Uncle Sam.

↑ 2 ↓ ○ Reply ...



**Alarming\_Ice\_8197** • 28d ago

I use expence/ invoice / income tracking on a spreadsheet that gpt helped me make, works pretty well, nice and simple. I created my own custom invoice in a spredssheet so it looks pretty. Quickbooks invoice looks cheezy and ammiture imo. I talked to my accountant about qbo and she said its pretty convenient to use qbo but doesnt matter to her. Maybe she will just charge me more or something idk lol I reccomend finding a local cpa that you like and letting them do your first year so you know how its done properly then ask them how you should do stuff to keep the cost down if you're talking directly about book keeping [r/Bookkeeping](#) is very helpful too. invoicing is not that hard, dont over think it. charge- tax- invoice number- make sure you get paid. I don't think service apps will are too necessary while just starting. More so if you have a good customer base and start getting people's information forgotten about, confused or if you have money to blow lol I keep all job/ customer and other information orginised in a folder on my computer, super simple.

↑ 2 ↓ ○ Reply ...



**Alternative\_Ask\_7181** • 28d ago



⊖ ↑ 2 ↓ ⊗ Reply ...



**No-Artichoke-4416** • 26d ago

I've heard great things about their service - I like that they give you real office managers who know the HVAC industry

↑ 1 ↓ ⊗ Reply ...



**Overall-Software7259** • 28d ago

You're starting a company and don't know even know how you are going to invoice?

⊖ ↑ 4 ↓ ⊗ Reply ...



**Zinner4231** • 28d ago

He's got his license tho..... quickbooks is a short answer. But as a hvac business owner for 30 years my best advice is for you to get a 2year business management degree before you step one foot in a truck with your name on it. Seems harsh now, but you and younger me would thank me later. Or just send it and see what happens....

⊖ ↑ 8 ↓ ⊗ Reply ...



**thermo\_dr** • 28d ago

Agreed. Or get a business partner. You would make more money sharing equity with a partner that knows how to run a business than running a ship with no direction.

Where are these customers coming from? Your current employer?

↑ 3 ↓ ⊗ Reply ...



**Alwaysangryupvotes** • 27d ago

How did I know I'd see one of these comments almost immediately. Y'all get on my mf nerves just give this man advise or stfu 😂

↑ 1 ↓ ⊗ Reply ...



**LucyBallistic** • 28d ago

Payzer

↑ 0 ↓ ⊗ Reply ...



**sadistinga** • 28d ago



2

+ Create



invoices. Track ar



1



Reply



**boatsntattoos** • 26d ago

I'm a one man show. QuickBooks does what I need.



1



Reply



**No-Length-6728** • 25d ago

I'd definitely recommend using a software like ServiceTitan/House Call Pro that has everything in one system with the ability to export to quick books for accounting purposes. If you are investing in a business, I easily think spending the money on one of these softwares in the beginning will be a huge help, plus it helps boost your customer experience. I am a former ST user/employee - happy to answer any questions you have!



1



Reply

