

**[Beka Rice](#)**

Last updated on June 5, 2019

5 Points to Consider if You Want to Sell Services using WordPress

Most of the focus on using WordPress for eCommerce is put into selling **products** with your eCommerce site. How can you add or manage products? Can you only add simple products, or can you have variations (such as tee shirt colors and sizes)? How can we manage stock for these products? How can we ship them effectively and get reliable rates?

However, not everything you sell will need to leverage all of the capabilities of your eCommerce platform. **Selling services** could make a lot of the features of your plugin, such as shipping capabilities and integrations, unnecessary. On the opposite side of that token, you still may need to leverage a lot of other features of your eCommerce plugin, such as the ability to send invoices or manage orders effectively. How do you find the optimal set of features for your service-based business? What things might you need? Those are questions we'll try to answer.

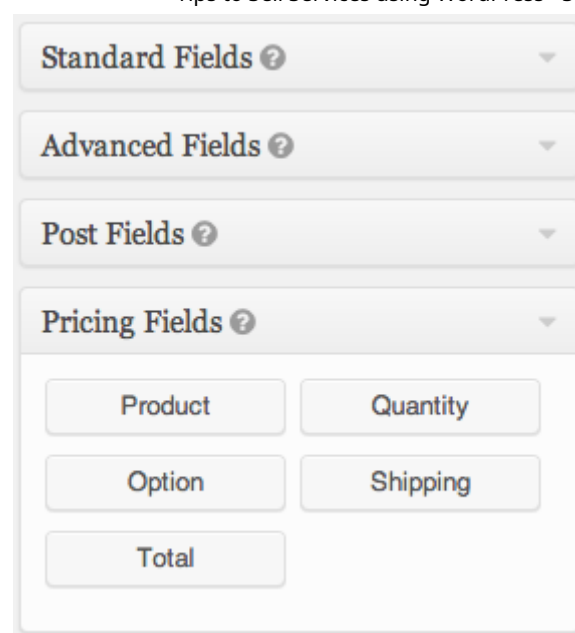
Here are some key considerations and important tips to bear in mind when creating an eCommerce site to **sell services using WordPress**.

What are you selling?

Are you going to only sell services with your site, or will you be selling anything else? For example, let's say you're a WordPress developer – you may do freelance work, but you may also sell plugins, themes, or ebooks. Maybe down the road you'll sell tee shirts, tools that help your customers, or any number of things. If you think you'd be selling something other than your services, it would be a good idea to start out by using an **[eCommerce plugin](#)**. I'd use one regardless since many eCommerce plugins sell services just fine, but this isn't your only option.

Gravity Forms

If you're only selling a few services, you could start with something like **[Gravity Forms](#)**. Gravity Forms includes the ability to set pricing fields as part of your forms, and chances are you'd probably be using it (or **[another form builder](#)**) already.

The image shows a screenshot of the Gravity Forms Pricing Fields interface. It features a vertical stack of four dropdown menus: 'Standard Fields', 'Advanced Fields', 'Post Fields', and 'Pricing Fields'. The 'Pricing Fields' dropdown is currently selected, revealing a grid of five buttons: 'Product', 'Quantity', 'Option', 'Shipping', and 'Total'. Each button is a light gray rectangle with rounded corners and a thin border.

Gravity Forms Pricing Fields

With a personal license, you can create forms for your site so that customers can enter the information needed and upload any product details to receive a quote for your services. You could then invoice customers after you send a quote or they've expressed interest in using your service. You could also use PayPal "Buy Now" buttons to accept payments, but that's going to be a bit cheesy if you have them all over the place.

With **add-ons**, you can also accept payment as part of these forms (for example, if you sell services at a set price, such as installation services, or you just want to be like [Fiverr](#) and sell random services at a fixed price). The **Developer License** for Gravity Forms includes several payment gateway integrations for you to accept payments, and there's also a [free Stripe add-on](#) available you could check out (newsflash: [we love Stripe](#)).

This is a pretty quick and easy way to sell services via your site, as you can simply create pages to list each service, then use a Gravity Form to either accept quote inquiries or to accept payments. You can also use the **FreshBooks** add-on, which is part of the developer license, to automatically add clients and create invoices in your [FreshBooks](#) account when a form is submitted.

eCommerce Plugins

For services-based sites, there are four eCommerce plugins I'd recommend that you take a look at using:

- [WooCommerce](#)
- [Easy Digital Downloads](#)
- [Shopp](#)
- [Cart66 Cloud](#)

Each of these plugins will provide you the flexibility needed to sell services or products (digital or physical, though selling physical products is tougher with EDD). They'll also offer the management tools needed to successfully run your service-based business.

WooCommerce can sell almost anything, and there are tons of extensions available to help you do so. For example, you could look at the [Bookings extension](#), which allows you to sell appointments or your time. This could be great for service businesses that have offerings like installations, coaching, appointments

(i.e., hair salons), and other products that require set time commitments. WooCommerce also offers tons of payment gateway options, and will allow you to sell your virtual products and services, or easily sell physical products if needed.

Easy Digital Downloads can be transformed into an extremely lightweight services plugin using a [free plugin](#) to remove the downloadable files notice on the confirmation page. EDD also boasts lots of payment gateway choices and add-ons for your store, and is a great choice if you know that you won't need to sell physical products in the future. While the plugin could do it, it's far better suited to all-digital shops.

Shopp offers a lot of flexibility right in the core plugin, as recurring payments are included, along with several other features. While Shopp doesn't boast as large of a marketplace, it does offer great options for both digital and physical products, and has good order management capabilities.

Cart66 Cloud is the only solution of these without a free core offering or reporting as part of the plugin, but it does provide some features that make it a contender for a different kind of site. Cart66 Cloud costs \$25-\$30 per month, but allows you to use recurring payments with any gateway offered, and can also protect content as a membership solution. It's a solid choice for shops that will sell services, products, and potentially offer membership content to customers. [Here's an article](#) on using Cart66 for a store that sells both services and products.

Do Customers Pay Now or Later?

This is a pretty integral problem to solve when setting up your eCommerce site. Will customers pay when they book services, or will they be getting a quote to pay later? Do you also sell anything for which customers will pay now? Managing all of your incoming revenue within your eCommerce site could be a really great system for you, so you'll probably want to keep payments coming in through your site rather than through invoices, via PayPal, and all over the place. This will help you out when we talk about [reporting](#).

If customers will end up paying when they book services (i.e., you sell services for a fixed fee), you'll probably want to use an eCommerce plugin that will allow you to list services as products, [accept payments](#), and manage any orders placed. The four plugins we've mentioned can definitely help you to do this, as all can take payment for your services up front.

If you'd like to instead **invoice services** and have customers pay them later, you may want to look at an invoicing solution that integrates with your eCommerce plugin. My favorite is **FreshBooks** – they offer [free trials](#) if you'd like to check them out. FreshBooks can integrate with either **WooCommerce** or **EDD**.

If you use [WooCommerce FreshBooks](#), you'll have complete synchronization between your WooCommerce shop and FreshBooks. You can use orders to generate invoices, and can even generate a new client for every single WooCommerce customer, or create all invoices under a default client. You can create or send invoices right from your WooCommerce admin. Invoices can be saved or sent automatically, and

payments will even stay synced between the two systems whether customers pay via WooCommerce or FreshBooks. This is really helpful so that all revenue is tracked within WooCommerce so you can see it using the WooCommerce reporting and get a business overview at a glance.

<input type="checkbox"/>		Invoice Status	Order
<input type="checkbox"/>	🕒	Sent	#299 by Skylar White skylarwhite@mailinator.com
<input type="checkbox"/>	⋯	Paid	#298 by Gus Fring gustavo@sogetthis.com
<input type="checkbox"/>	⊖	Draft	#297 by Walter White heisenberg@mailinator.com
<input type="checkbox"/>	✓	Paid	#296 by Hank Schrader schraderbrau@mailinator.com

FreshBooks invoice statuses

If you are planning to go the WooCommerce route, here’s a [great tutorial on creating an invoicing system](#) that I’d check out.

If you use [FreshBooks for EDD](#), an invoice, payment, and client are created in FreshBooks for each purchase. This will allow you to ensure that every download purchase can create or send an invoice. If you use the [free Downloads to Services plugin](#) we mentioned, this provides a really simple solution to managing both up-front payments and those that must be invoiced while still ensuring EDD reporting tracks all revenue.

If you don’t want to use FreshBooks, you can also use the PDF invoicing plugins available for WooCommerce and EDD. WooCommerce has both [Print Invoices / Packing Lists](#) and [PDF Invoices](#) plugins available, while EDD has a [PDF Invoices](#) extension as well.

Do You Need Recurring Payments?

All four of the solutions mentioned can also use recurring payments for services that require monthly payments, such as utilities, website management plans, or retainers. **Cart66 Cloud** and **Shopp** have recurring payment capabilities built into their respective platforms, which can be tied to product or service purchases.

WooCommerce and **Easy Digital Downloads** require paid add-ons to accept recurring payments. [WooCommerce Subscriptions](#) (\$199) will allow you to accept recurring payments with several [WooCommerce payment gateways](#), while [EDD Recurring Payments](#) (\$83) integrates with PayPal Standard, Stripe v1.5 or later, and Paymill 1.1 or later.

Managing Customers and “Orders” ?

Each of this plugins will allow you to effectively manage orders, view customer information, and add internal notes to orders. While your eCommerce plugin will not provide a full CRM (Customer Relationship Management) system, the ability to view when customers submitted quotes or purchased services, to resend emails, update customer information, view past orders, and view internal notes will be really helpful in managing services.

Cart66 Cloud will require you to leave your WordPress site to manage orders, while the other 3 plugins will allow you to view all orders right from the plugin admin. Of the other 3, I think WooCommerce and Shopp slightly edge out EDD, as they allow you to view customer lists in the same place that you can view orders, but EDD requires you to view customer reports instead. WooCommerce can do this by filtering by customer, while Shopp provides a customer list. WooCommerce also does include a separate customer list under reports in addition to the information available with orders.

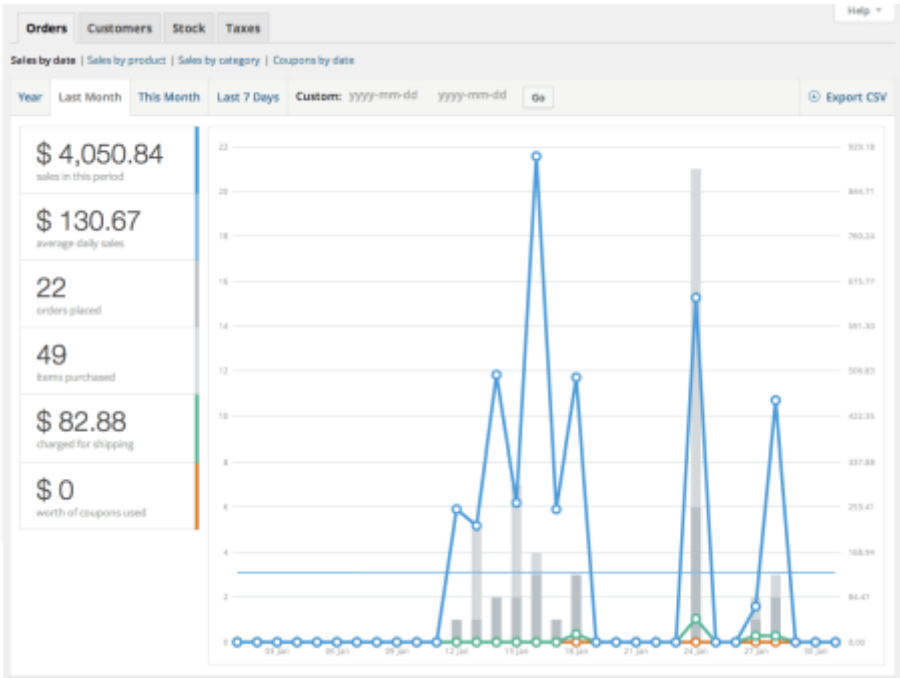
As a side note, WooCommerce also has a plugin that creates the ability to add custom fields to orders for easier administration – [Admin Custom Order Fields](#). This may help replace some of what’s needed from a CRM, as it allows administrators to create new order fields for better management, and this fields can optionally be shared with customers.

Using Reporting for a Business Overview ?

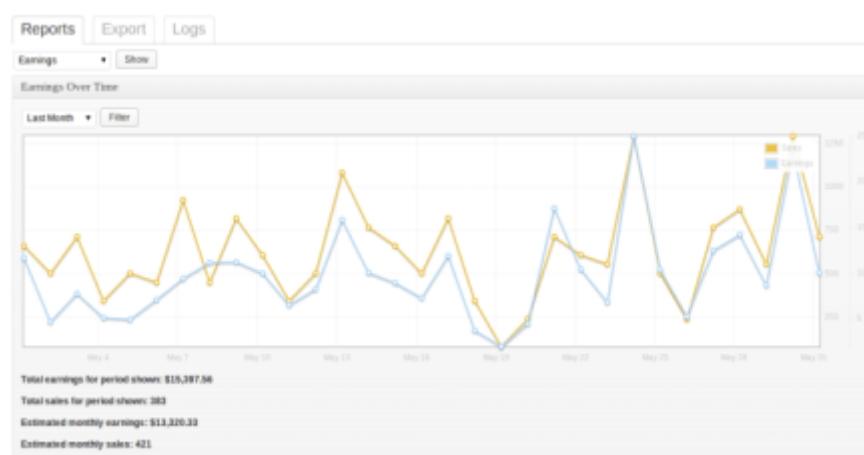
Reporting is a super helpful feature of WooCommerce, Shopp, and EDD. Using the built in reports, you can view revenue by date range, view customer lists, details on shipping and taxes, and more. WooCommerce will even let you view sales by product and category.

By keeping payment for all services and products located in one place, you can leverage reports to get information about your customers and the products or services offered. You’ll also see all revenue in one convenient place, which can then be exported to your accounting system as needed.

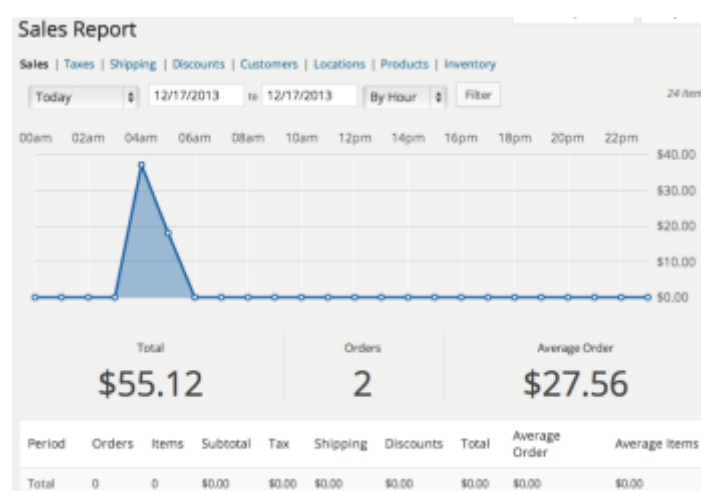
Here are some examples of reporting with each:



WooCommerce Sales Reporting



EDD Reports



Shopp Reporting

Conclusion: Go Sell Services using WordPress ?

Using [Gravity Forms](#), [WooCommerce](#), [Easy Digital Downloads](#), [Shopp](#), or [Cart66 Cloud](#) will allow you to easily create an eCommerce site to sell services using WordPress.

Gravity Forms is probably best for sites that only sell a few services and have no need for recurring payments or order management. It's a very handy tool you probably already use, and it will allow you to collect project details and potentially collect payment up-front with form submissions. You can also tie it to FreshBooks invoicing for "pay-later" capabilities.

WooCommerce is extremely flexible and is a great all-around choice. The tight integration with [FreshBooks](#) makes it a compelling choice for shops that want to use FreshBooks for invoicing or to sell via the store checkout, but it may be overkill if you sell nothing else besides a few services. However, the availability of extensions and other tools is a big positive.

Easy Digital Downloads will also allow you to integrate with FreshBooks to support immediate or future payments. It's more lightweight than WooCommerce but also offers several add-ons so you can get the extra shop tools you need. It's also flexible and provides a great choice for shops that won't be selling physical products.

Shopp doesn't offer as many integrations as other plugins, but does include recurring billing, easy order management, and the ability to sell both services and products. It's handy for those of you that want these capabilities within one plugin.

Cart66 Cloud rounds out our list to provide a great all-around option. Using Cart66 Cloud, you can sell products, services, memberships, and use recurring billing for almost any payment gateway. However, integrations are hard to come by, it doesn't do a great job with order management, and has no reporting capabilities. It provides a good all-around alternative to WooCommerce if you prefer to use a hosted solution instead, or require recurring payments with a particular gateway.

If you're using any of these plugins or services, don't forget to check out our [coupons and special offers!](#) We may be able to save you some cash on purchasing these products.

Read More

- Here's the article from *Chris Lema* on [using Cart66 Cloud to sell both products and services](#)
- Here's the tutorial from *Patrick Rauland* on [creating a WooCommerce invoicing system](#)

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[#Easy Digital Downloads](#), [#WooCommerce](#)



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Beka Rice is the Head of Product at Jilt.

13 Comments

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Pingback: [Week in review: Evolving the customizer, WordPress philosophies, and more : Post Status](#)



Dan Cameron
July 1, 2014 at 2:34 pm

I'm hoping the launch of our Sprout Invoices app will push for an update to this post in the near future. We haven't launched yet but I think anyone looking for a solution to invoice a client/customer would benefit greatly from our app.

Cheers!

king davewhite



[June 15, 2015 at 4:46 am](#)

I want to sell unique Facebook status quotes on my word press websites but i don't know how to go about it. please can you help me?



John MacPherson

[June 19, 2015 at 2:41 am](#)

Great article..

Are you aware of any way of doing metered billing with any of these plugins?

Also, do you know of a way to send a pre-populated cart to clients so they can go straight to the cart page? E.g. Including recurring service 3, product 4, add on 8. So after speaking with a potential client you can send a proposal by email with a link to signup?



[Beka Rice](#)

[June 19, 2015 at 1:14 pm](#)

Hey John, if you want to do metered billing, you'd probably need to send invoices, so a FreshBooks integration might be a good idea. Not sure if there's a better solution honestly.

If you want to send a pre-populated cart with WooCommerce, you could [check out this plugin](#).

Pingback: [How to Easily Sell Services from Your WordPress Website](#)



[Morgan](#)

[October 17, 2015 at 4:02 am](#)

Thanks for this article, I was in the process of developing my own shopping cart but with your help I have found a few options that I can use to manage all that.

Thanks alot



[Ariel Herrera](#)

[November 19, 2015 at 1:27 am](#)

Hello Beka, I like your article I have so much time evaluating CMS platforms, as plugins for each of them to sell services, unfortunately have failed to find any system of sale (WooCommerce, Shopp, etc.) that allows me to leave a “detail of the services contracted/purchased or expiration details in the client profile ” do you know any?

Regards,

Ariel



Abigail Smith

May 16, 2016 at 11:30 am

Hello,

Loved the article! Very helpful. Wondering if you know the answer to any of these:

I am a high school student starting a business with my brother. We are launching a company that finds refunds for customers on late packages. Essentially we have software that analyzes data, determines which packages are late, then submits those to shipping companies (such as FedEx) to get refunds for our customers. The refund gets charged directly back to the customers shipping account. My company then wants to be able to charge the customer's credit card for a percent of the refund (they would sign an agreement up front that we would be allowed to do so). Is there a way (that you know of) to use wordpress/woocommerce/anything else to be able to charge credit cards a varying amount only when we find refunds? And then have the customer be able to sign into their account to see the packages we checked, the ones that were refunded, and how much they were charged etc?

This is kind of a long winded and complicated question, but thank you for any input you may have.



Beka Rice

May 19, 2016 at 11:01 pm

Hey Abigail, you'd need to use a payment gateway that will allow you to tokenize the customer card information (such as Authorize.net CIM or Stripe), and you can use the saved token to run transactions later for the recovery fees.

As for an account system, that sounds pretty custom / niche, so afraid I don't know of a pre-built solution for something like that.

**laura**May 18, 2016 at 11:31 pm

Hi Beka... I am looking at buying the Woocommerce Subscriptions... and I read articles you write. I am on your subscription list. I tried to click the Woocommerce Subscription so that in case I buy it... you get your referral bonus. But it was a 404. Here:

“WooCommerce and Easy Digital Downloads require paid add-ons to accept recurring payments. WooCommerce Subscriptions (\$199)”

Just letting you know.

I'll try to wait until you can get the referral because I get your newsletter and read your articles... and not so sure I'd buy it if you didn't recommend it.

Thanks!

**Beka Rice**May 19, 2016 at 10:57 pm

Hey Laura, thanks so much for the kind words and the heads up! Much appreciated 😊 Link fixed, and the [right one is this](#). thanks!

Hmm, looks like this article is quite old! Its content may be outdated, so comments are now closed.