

# September 2024 product release overview

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## Multi-entity accounting & financial management

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## Dimensions & business intelligence

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## Project financials & job costing

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Some features offer benefits that apply to more than one category.

# Multi-entity accounting & financial management

Automated and streamlined finances for  
valuable insights to scale your business

# Automated recurring reminders

What

Customize your reminder schedule to automatically send notifications until invoices are paid, estimates are accepted, bills are paid, and purchase orders are closed.

Why

Get peace of mind knowing follow-ups with customers, vendors, and employees are handled for you.

Create a workflow

Take tour

Help

Recurring invoice reminder workflow

When this happens

Invoice approval status is Unpaid

Do this

Send reminder

Create and send recurring reminder

Start

0

days

Before invoice is due

Repeat every

2

days

End

When invoice is paid

Note:

Reminder will be sent once to the assignee. Reminder task will get closed automatically once someone takes an action over it.

Notify via

Task

Edit

Email to your team

Edit

Email to customer

Edit

Cancel

Save

Save and turn on

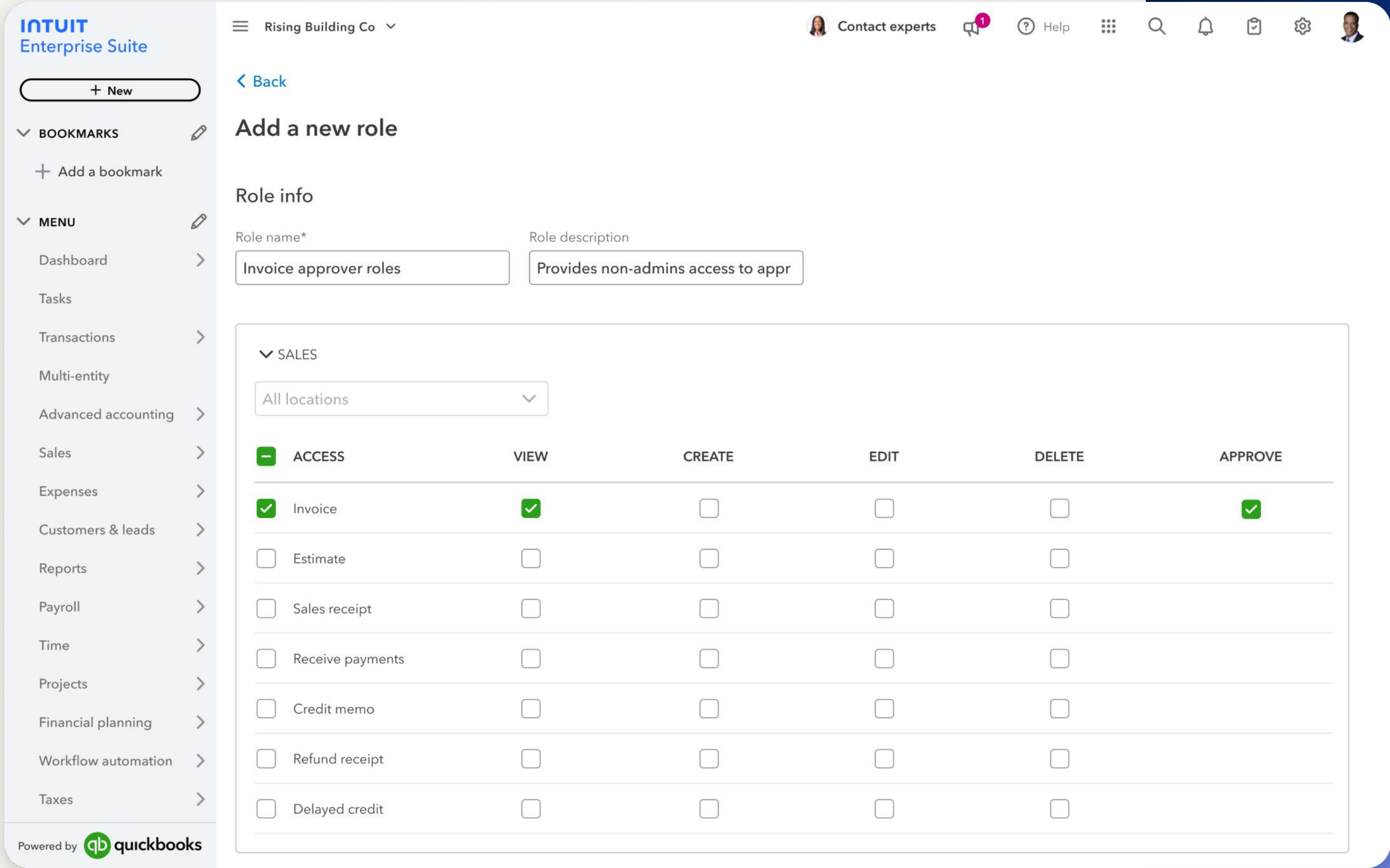
# Custom invoice approver role

What

Add non-admin users to a custom invoice approver role.

Why

Grant invoice approval permissions to those who need it. This helps you separate duties and scale your business.



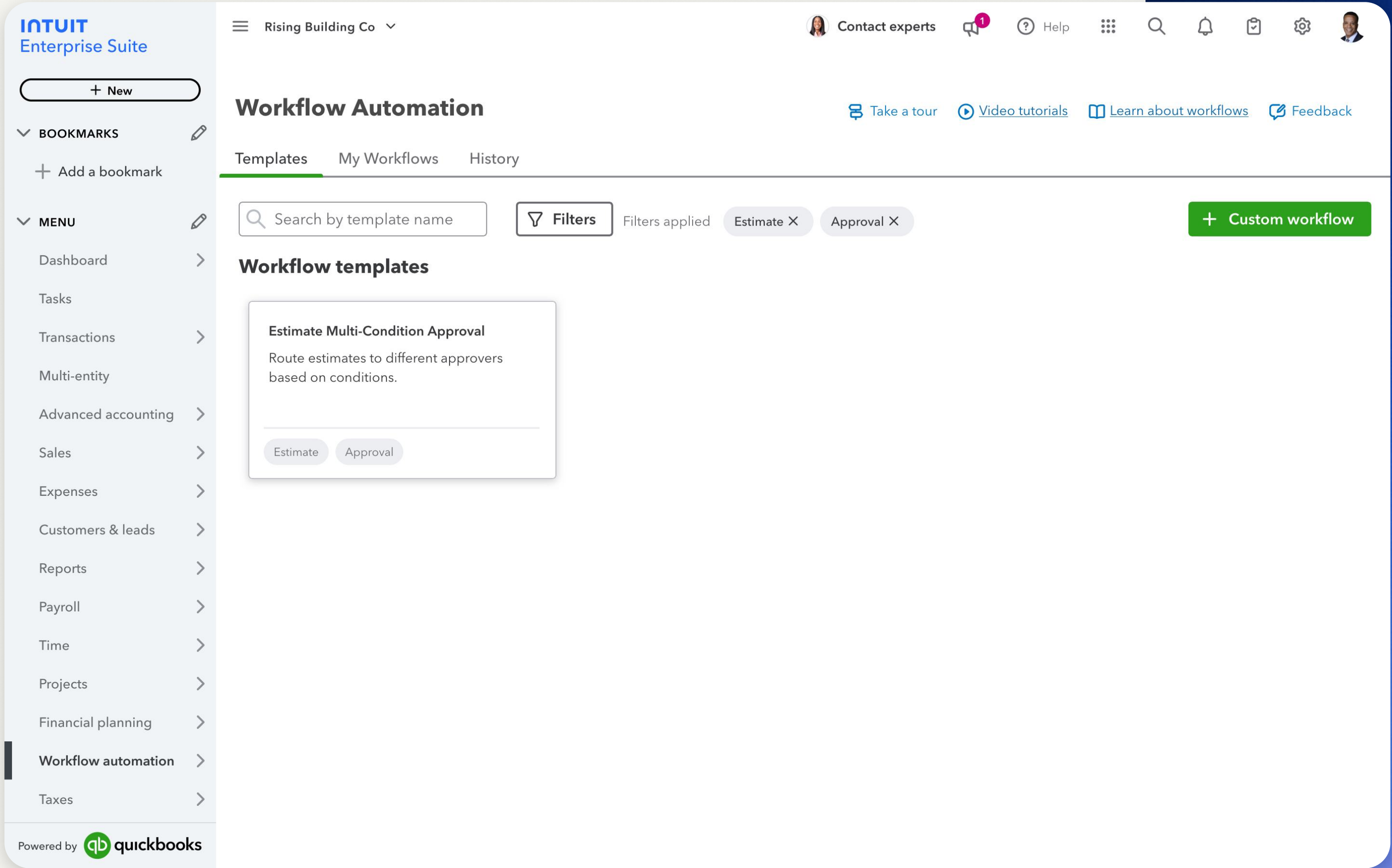
# Estimate approval workflows

What

Request internal approval before sharing an estimate with your customer.

Why

You can produce higher quality, more accurate estimates.



# Fixed asset auto-detection & creation

What

When you add items that have fixed asset accounts to expenses or bank feeds, we'll automatically create a fixed asset draft based on the info you entered.

Why

Manage fixed assets more efficiently by eliminating the need to manually enter the same data in multiple places.

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Enterprise Suite

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BOOKMARKS

+ Add a bookmark

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Payroll

Time

Projects

Financial planning

Workflow automation

Taxes

Powered by qb quickbooks

Rising Building Co

Contact experts

Help

Advanced accounting

Revenue Recognition

Fixed assets

Fixed assets

Give feedback

How it works

See report

Add multiple assets

Add an asset

Now you can save a fixed asset as a draft

Create a fixed asset and save it as a draft, so you can come back and edit it before it posts to your books. Try now

Filters

Search

| Asset Name               | Location | Purchase Price | Purchase Date | Depreciation Start Date | Asset Account | Accumulated Depreciation | Status       | Action |
|--------------------------|----------|----------------|---------------|-------------------------|---------------|--------------------------|--------------|--------|
| Pickup truck             | -        | \$5,000.00     | 04/01/2024    | 06/01/2024              | -             | \$0.00                   | Draft        | Review |
| Laptop fully depreciated | -        | \$2,000.00     | 04/01/2023    | 04/01/2023              | -             | \$466.62                 | Depreciating | View   |
| Laptop                   | -        | \$10,000.00    | 05/09/2024    | 05/09/2024              | -             | \$82.50                  | Depreciating | View   |
| Laptop                   | -        | \$40,000.00    | 05/08/2024    | 05/08/2024              | -             | \$1,111.11               | Depreciating | View   |
| Dump truck               | -        | \$20,000.00    | 04/01/2024    | 04/01/2024              | -             | \$325.00                 | Depreciating | View   |
| Computer                 | -        | \$5,000.00     | 04/22/2024    | 04/22/2024              | -             | \$138.89                 | Depreciating | View   |
| Laptop                   | -        | \$3,000.00     | 02/01/2024    | 02/01/2024              | -             | \$277.76                 | Depreciating | View   |
| Laptop                   | -        | \$3,000.00     | 10/01/2023    | 11/01/2023              | -             | \$291.67                 | Depreciating | View   |

# Intercompany chart of accounts setup

What

Standardize intercompany chart of accounts setup across multiple linked companies.

Why

Save time and set up their intercompany chart of accounts more accurately because they don't have to manually enter the same information multiple times.

Select accounts for intercompany eliminations

Only select accounts you use for transactions between related companies. We'll automatically offset the transactions and balances in your consolidated reports.  
[Learn about intercompany eliminations](#)

1-3 of 3 items

< Page 1 of 1 >

| Companies          | Accounts                      |
|--------------------|-------------------------------|
| Horizon Investment | <div>Select accounts...</div> |
| Nest Homes         |                               |
| Marketplace Realty |                               |

SELECTED

✓ Intercompany expenses

✓ Intercompany sales

✓ Investments in subsidiaries

ALL CHART OF ACCOUNTS

Accounts payable (A/P)

Accounts receivable (A/R)

Done

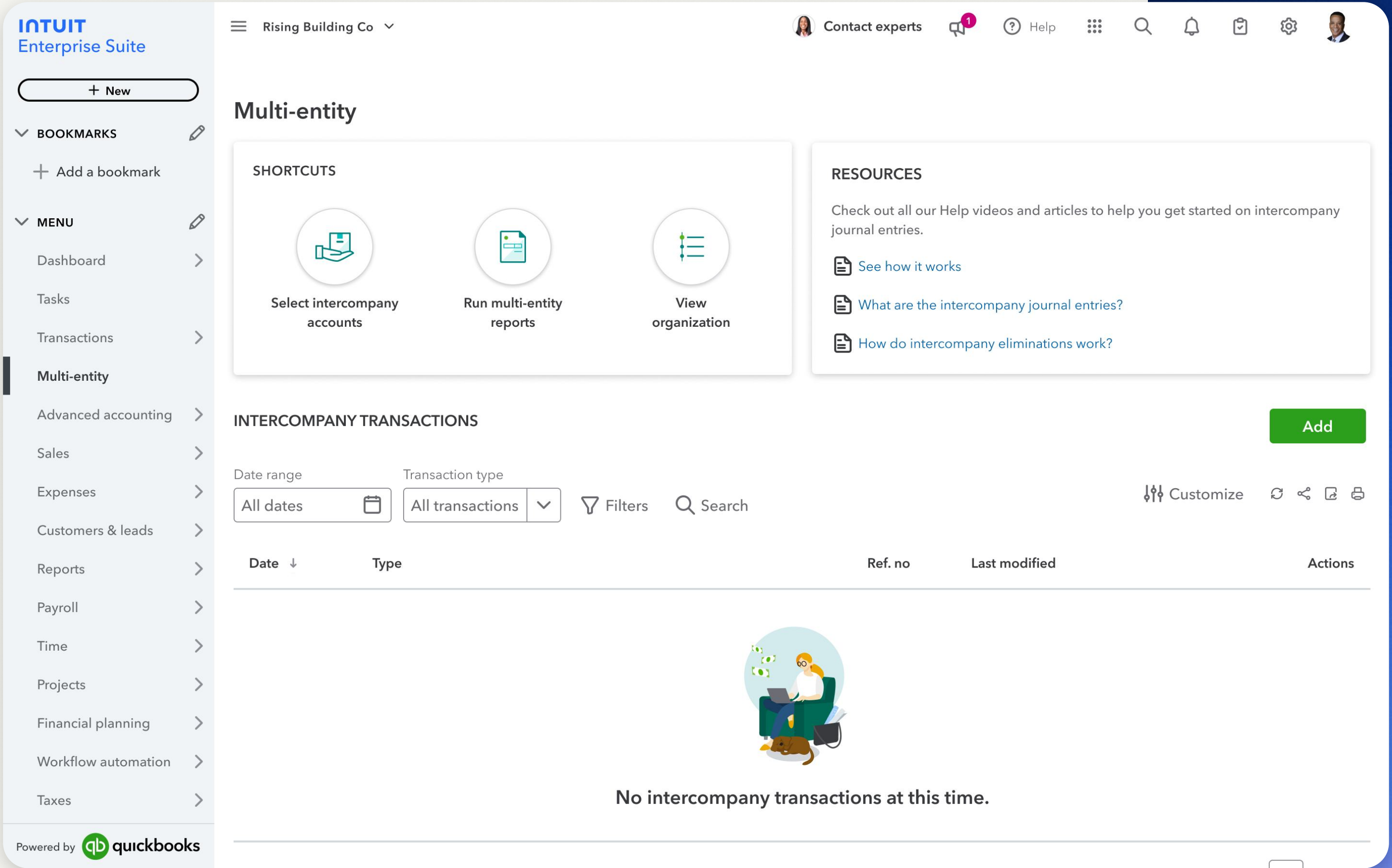
# Multi-entity navigation

What

Multi-entity is now its own menu item, rather than being under Advanced accounting.

Why

Get to multi-entity tasks in fewer clicks.



# Multi-entity user management

What

Manage users across the primary company and linked companies from a single dashboard.

Why

Save time by managing permissions for multiple entities in one place.

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Help

Back

Add a user

Personal info

We'll send them an invite to access Intuit Enterprise Suite.

First name

Bryan

Last name

Villa

Email

bryan.villa@gmail.com

Company access

Select the role this person should have for Horizon Investments. You can also give access and assign roles for other companies. [View role descriptions](#)

Company name

Add company

| <input type="checkbox"/> | Company Name       | Role                | Actions                          |
|--------------------------|--------------------|---------------------|----------------------------------|
| <input type="checkbox"/> | Horizon Investment | Standard all access | <a href="#">View permissions</a> |
| <input type="checkbox"/> | Nest Homes         | Assign role         | <a href="#">View permissions</a> |
| <input type="checkbox"/> | Marketplace Realty | Assign role         | <a href="#">View permissions</a> |

Delete user

Add user

# Shareable workflow templates

What

Duplicate and customize approval workflow templates. Share them with all your linked companies.

Why

Save time, help ensure compliance, improve oversight, and prevent errors when you use these duplicated approval templates across your linked companies.

Publish as template

Start

Workflow started by event

Bill is created or edited

When this happens

Bill amount is between \$0 and \$1000

Yes

No

Do this

Request approval from ---

Stop

When this happens

Bill amount is greater than \$1000

Yes

No

Do this

Request approval from ---

Stop

100%

Zoom to fit

Cancel

Publish as template

Template details

Note: Publishing template shares this template with your team and/or QuickBooks community. They get notified about the shared template. It'll help them to readily use this template and create their own workflow from it.

Template name

Bill Multi-Condition Approval

Description

Route bills of different amounts to different approvers and set levels of approvers.

Author name

Mark Walberg

Tags

Search tags...

Bill Approval

Share with

☒ Companies

All my companies

☐ QuickBooks community

# Dimensions & business intelligence

Detailed, dimensional reporting and  
automated, predictable finances

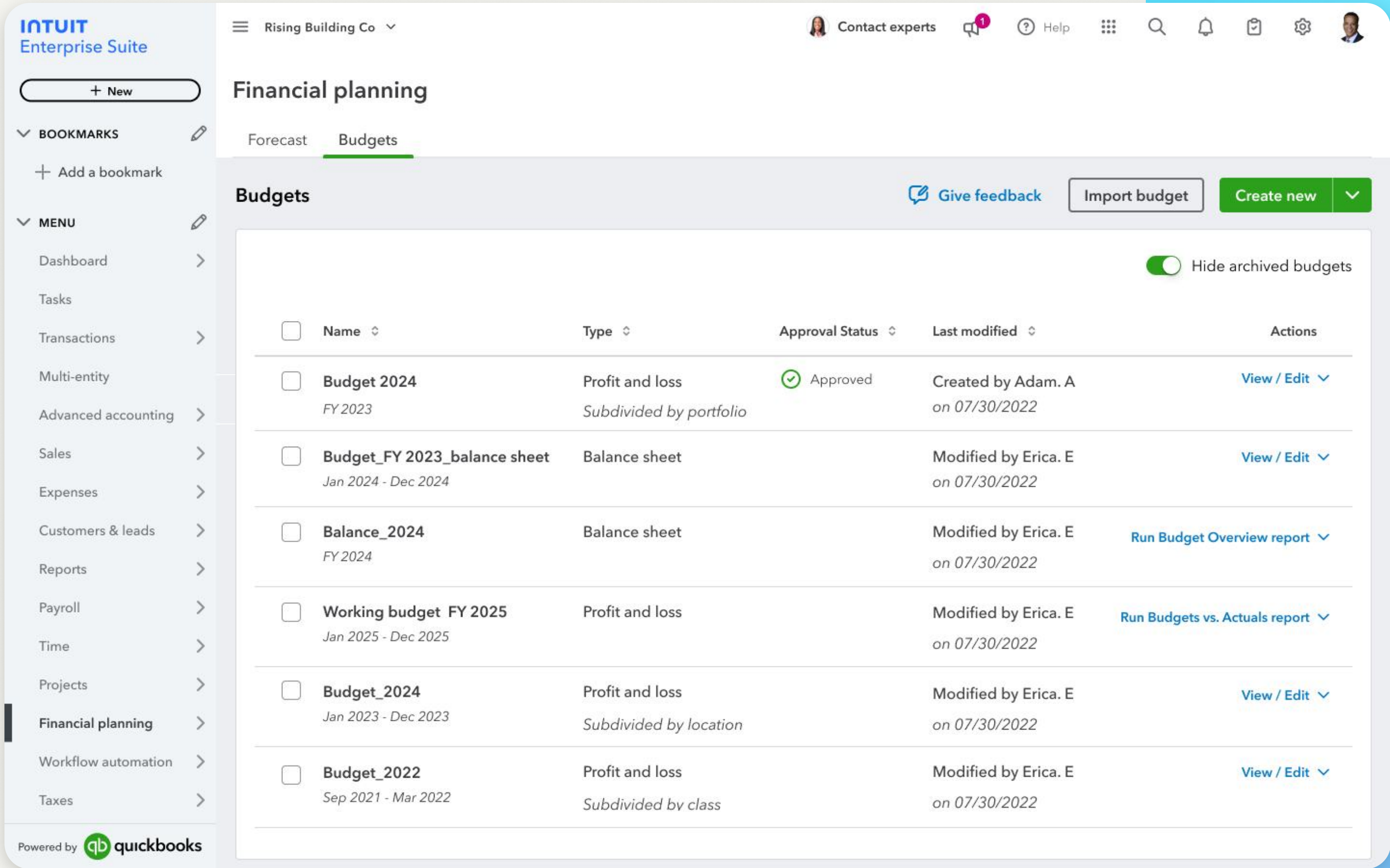
# Budget collaboration & approvals

What

Collaborate on budgets with other department heads and get them approved with approval workflows.

Why

Collaborating with others in the same context lets you complete work more efficiently. It also ensures that budgets are reviewed correctly, which is essential for growth.



# Customer-defined dimensions

What

Create up to 20 dimensions, including your original class. You can purchase up to 19 customer-defined dimensions.

Why

Unlock greater levels of insights with even more granular tracking for income and expenses.

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Transaction List

More actions

Export

Save

Table View

Chart View

Last month

Pivot

Group

Filter

Customize

Transaction List

14 Aug - 20 Aug

| Portfolio<br>(Invoice line item: Portfolio) | Revenue Type<br>(Invoice line item: Revenu...) | Investor<br>(Invoice line item: Investor | Classes<br>(Invoice line item: |
|---------------------------------------------|------------------------------------------------|------------------------------------------|--------------------------------|
| Commercial                                  | Rent                                           | HK Investment                            | Sub-class A                    |
| Residential                                 | Sale                                           | York Residence                           | Sub-class B                    |
| Residential                                 | Sale                                           | York Residence                           | Sub-class C                    |
| Commercial                                  | Sale                                           | HK Investment                            | Sub-class D                    |
| Commercial                                  | Rent                                           | HK Investment                            | Sub-class E                    |
| Urban                                       | Rent                                           | York Residence                           | Sub-class F                    |
| Townhouse                                   | Sale                                           | York Residence                           | Sub-class G                    |
| Condo                                       | Rent                                           | York Residence                           | Sub-class H                    |
| Suburban                                    | Sale                                           | HK Investment                            | Sub-class I                    |
| Single Family                               | Sale                                           | York Residence                           | Sub-class J                    |
| Commercial                                  | Rent                                           | HK Investment                            | Sub-class K                    |
| Residential                                 | Rent                                           | York Residence                           | Sub-class L                    |
| Urban                                       | Sale                                           | HK Investment                            | Sub-class M                    |
| Suburban                                    | Rent                                           | York Residence                           | Sub-class N                    |
| Commercial                                  | Sale                                           | York Residence                           | Sub-class O                    |

9 columns | 48 rows | Updated a few seconds ago

Customize report

Cash

Accrual

Columns

Layout

General

NEW

Select your data

Clear all

Search columns...

Line items

Account

Show more

Dimensions

Portfolio

Portfolio

Deleted

Created date

Last modified date

Full name

Revenue Type

Investor

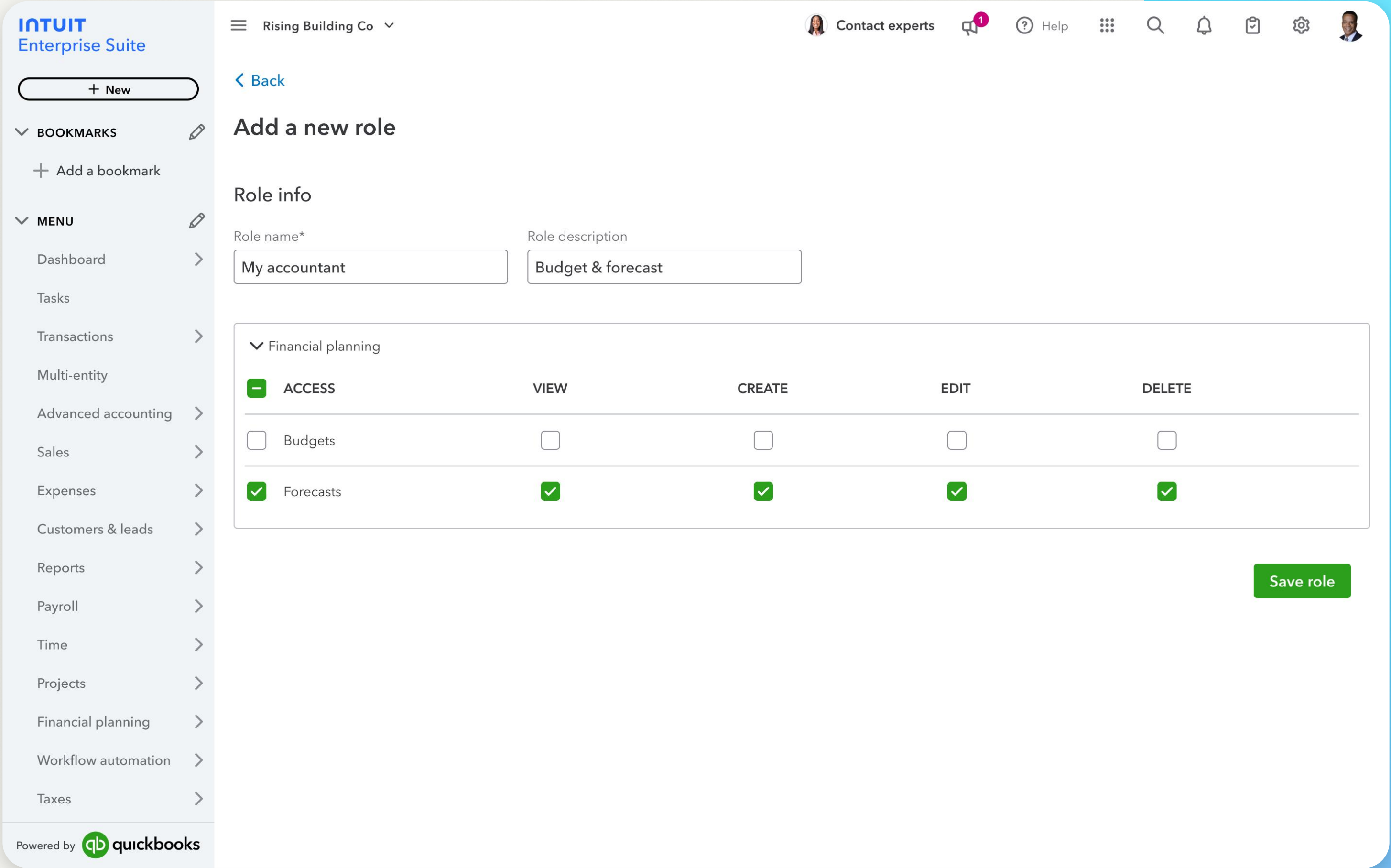
# Custom roles for forecasts & budgets

What

Set up granular user permissions for access to budgets and forecasts.

Why

With these new permissions, you control who has access to your forward-looking financial data, so you can protect your company's sensitive information.



# Dimensions with budgets

What

Incorporate dimensions into budgets.

Why

Create more granular budgets for more precise tracking, deeper insights, and better decision making.

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< Back

Budget vs. Actuals P&L by Portfolio

More actions

Export

Save

Custom dates

01/01/2024

31/12/2024

Accrual

Compare

Display

Filter

General options

Budget vs. Actuals P&L by Portfolio

Jan 2024 - Dec 2024

|                          | Residential     |                 |                 |             |
|--------------------------|-----------------|-----------------|-----------------|-------------|
|                          | Actuals         | Budget          | Variance        | % of budget |
| Income                   |                 |                 |                 |             |
| Billable Expense Income  | \$1,050,098.35  | \$385,133.00    | \$664,965.35    | 272.66%     |
| Discounts given          | \$1,090.00      | \$0.00          | \$0.00          |             |
| Discounts/Refunds Given  |                 | \$0.00          | \$0.00          |             |
| Total Discounts Given    |                 | \$0.00          | \$0.00          |             |
| Markup                   | \$10.00         |                 | \$15.00         |             |
| Sales                    | \$27,004,650.00 | \$9,901,990.00  | \$17,102,660.00 | 272.72%     |
| Sales of Product Income  | \$205.00        | \$0.00          | \$205.00        |             |
| Sales of Product Revenue |                 | \$0.00          | \$0.00          |             |
| Total Income             | \$28,054,968.35 | \$10,287,123.00 | \$17,767,845.35 | 272.72%     |
| Cost of Goods Sold       |                 |                 |                 |             |
| Cost of Goods Sold       | \$75.00         |                 | \$75.00         |             |
| Total Cost of Goods Sold | \$75.00         | \$0.00          | \$75.00         | 0.00%       |

Display

Select a way to slice your data

Total

Total

Date

Customer name

Vendor name

Employee name

Product/Service

Class

Portfolio

Revenue Type

Investor

Location

Powered by qb quickbooks

34 Columns | 57 Rows | Updated 20 minutes ago

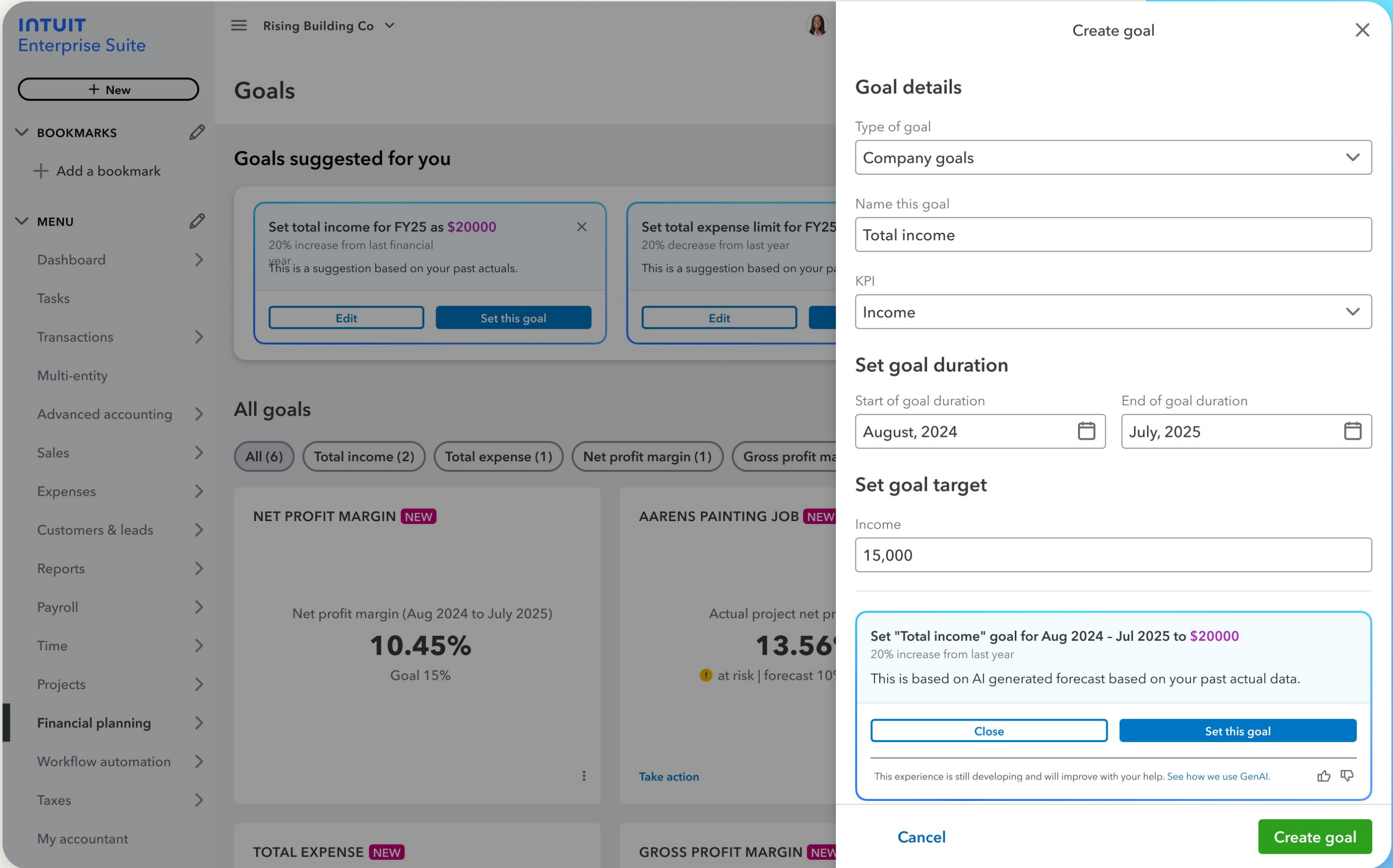
# Financial goal setting

What

Create income, expense, and profit margin goals based on AI-powered recommendations.

Why

AI-powered goal setting saves time and helps you more efficiently run your business with confidence.



# Payroll cost allocation

What

Assign multiple project or class values to a single employee within the same pay period for any wage item. If you use QuickBooks Time, these allocations will automatically transfer from QuickBooks Time.

Why

Save time and track labor costs with increased accuracy to specific categories. This gives you the detailed insights you need to boost profitability.

Available for customers with QuickBooks Online Payroll Premium and Elite.

Categorize

Give feedback?

Organize your payroll transactions

Better understand your payroll expenses on reports. Changes made here will only affect this pay run. Go to **Payroll settings** to make changes for future pay runs.

| Employee (30)                                | Hours           | Pay               | Percentage | Class                  | Customer/Project                                          |
|----------------------------------------------|-----------------|-------------------|------------|------------------------|-----------------------------------------------------------|
| <div>▼ Baxter, Jason</div> <div>Hourly</div> | 180h            | \$4,980.00        |            | 2 selected             | 2 selected                                                |
| Regular<br>\$28.00/h                         | <div>128h</div> | \$3,584.00        | -          | <div>Residential</div> | <div>Dalton: renovation</div>                             |
|                                              | <div>32h</div>  | \$896.00          | -          | <div>Commercial</div>  | <div>Alexander: renovation</div> <div>+</div> <div></div> |
| NY Drywalling<br>\$25.00/h                   | <div>16h</div>  | \$400.00          | -          | <div>Residential</div> | <div>Dalton: renovation</div>                             |
|                                              | <div>4h</div>   | \$100.00          | -          | <div>Commercial</div>  | <div>Alexander: renovation</div> <div>+</div> <div></div> |
| Overtime                                     | <div>0h</div>   | \$0.00            | -          | <div>Residential</div> | <div>Dalton: renovation</div> <div>+</div>                |
| Bonus                                        | -               | <div>\$0.00</div> | -          | <div>Residential</div> | <div>Dalton: renovation</div> <div>+</div>                |
| Reimbursement                                | -               | <div>\$0.00</div> | -          | <div>Residential</div> | <div>Daltonr: renovation</div> <div>+</div>               |

Cancel

Confirm

# Shareable workflow templates

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Do this

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Author name

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Tags

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Bill Approval

Share with

☒ Companies

All my companies

☐ QuickBooks community

Cancel

Publish as template

# Project financials & job costing

Streamlined and more profitable project  
management

# Change order management

What

Track changes to the original project estimate and send updates for the customer to approve, for both estimated cost and income.

Why

Streamlining change order management saves time, improves accuracy of project-related financial information, and increases project profitability.

Change order

Take tourFeedbackOld layoutHelp

EditEmail viewPDF viewPayor viewManage

Total change in cost: \$10,500.00Total change in income: \$21,000.00Previous profit margin: 43.75%Estimated profit margin: 45.88%

CHANGE ORDER

Linked transactions (1)

| Type               | Date        | Amount      |        |
|--------------------|-------------|-------------|--------|
| Project estimate#1 | May 7, 2024 | \$11,250.00 | Remove |

Rising Building Co.

Bill to:

AJ Brinnand

7535 Torrey Santa Fe Rd

Scranton, PA 92129

Ship to:

AJ Brinnand

7535 Torrey Santa Fe Rd

Scranton, PA 92129

Change order no.

1

Change order date

03/06/2024

Expiration date

MM/DD/YYYY

Edit customer

Tags (hidden):

Add or select a tag from list

| # | Date       | Product/Service | Description | Qty | Your rate (hidden) | Your total (hidden) | Markup% (hidden) | Cust |
|---|------------|-----------------|-------------|-----|--------------------|---------------------|------------------|------|
| 1 | 03/06/20.. | Parts           |             | 30  | 2500               | 7500                | 100              |      |
| 2 | 03/06/20.. | Flooring        |             | 2   | 1500               | 3000                | 100              |      |

Cancel

Save and send

Previous products/service

Use these to create your change order and we'll update your linked estimate.

FilterRemove all

Parts

Rate: \$5.99

Quantity: 30

Amount: \$179.70

Description: Strainer 1/60V-24251-01-00 ...

Remove

Private consultation

Rate: \$80.00 flat rate

Amount: \$100.00

Description: Facilitating mediation confer...

Remove

Lawn mowing

Amount: \$100.00

Description: Includes garbage disposal

Remove

Lawn mowing

Amount: \$100.00

Description: Includes garbage disposal

Add

# Estimate approval workflows

What

Request internal approval before sharing an estimate with your customer.

Why

You can produce higher quality, more accurate estimates.

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Help

Video tutorials

Learn about workflows

Give feedback

Workflows

Templates

My workflows

Run history

All sources

All actions

Last updated by

Updated on

Search...

+ Custom workflow

My workflows

| WORKFLOW NAME                 | RECORD TYPE | WORKFLOW TYPE | LAST UPDATED BY    | UPDATED ON | ON/OFF                              | ACTIONS |
|-------------------------------|-------------|---------------|--------------------|------------|-------------------------------------|---------|
| Actual cost vs estimated cost | Project     | Reminder      | Scott Lis          | 06-08-2024 | <input checked="" type="checkbox"/> |         |
| Estimate Approval Workflow    | Estimate    | Approval      | Bryan Villagonzalo | 10-09-2023 | <input checked="" type="checkbox"/> |         |
| Invoice Approval              | Invoice     | Approval      | Vanessa Salazar    | 10-06-2023 | <input type="checkbox"/>            |         |
| Overdue invoice alert         | Invoice     | Reminder      | Libby Norris       | 12-25-2022 | <input checked="" type="checkbox"/> |         |
| Pay vendor reminder           | Bill        | Reminder      | Aladrian Goods     | 04-12-2022 | <input checked="" type="checkbox"/> |         |

1-5 of 8 items

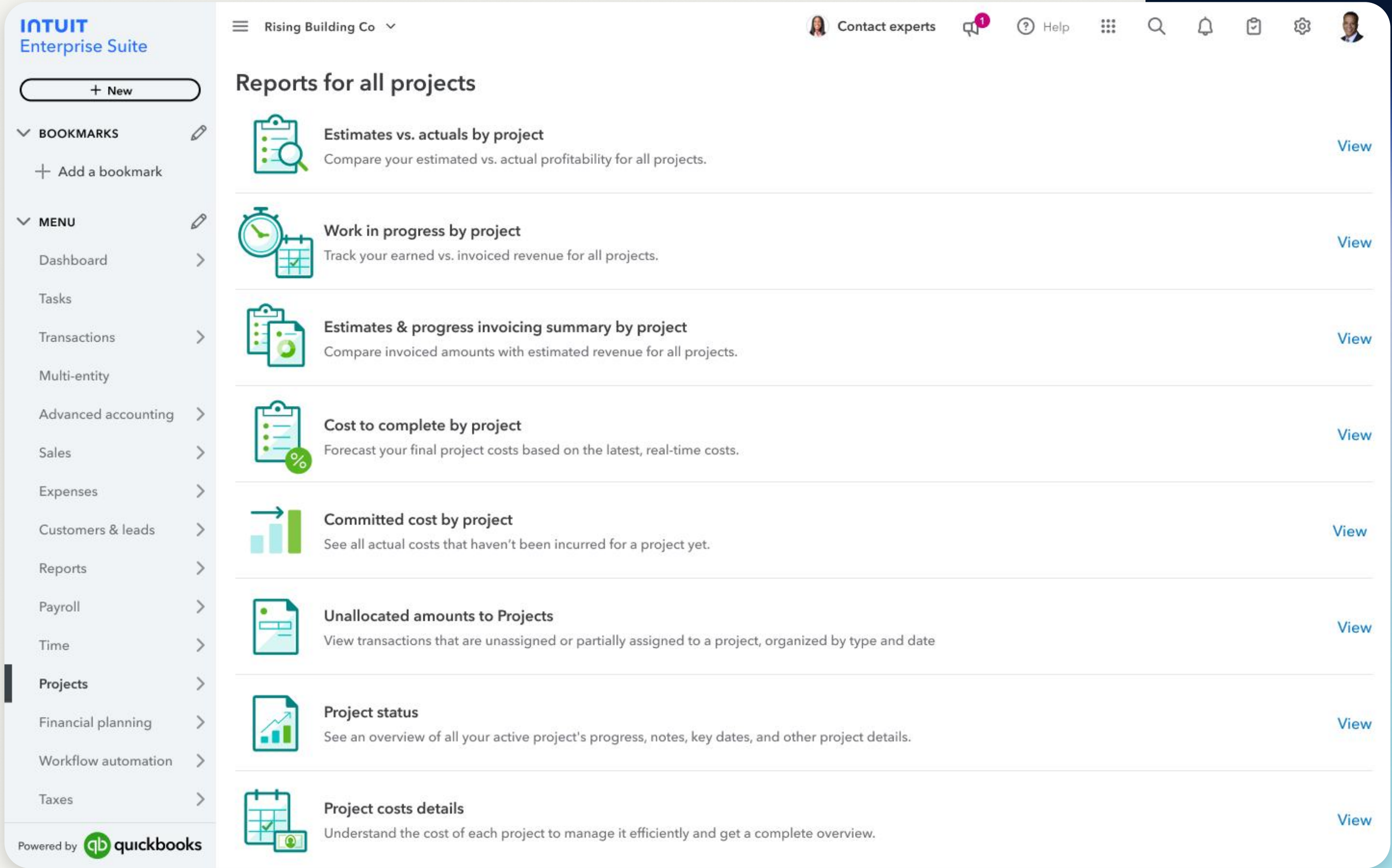
# Industry-specific reports

What

Access 6 new project-related reports: Committed costs, Change orders, Project status, Project costs by vendor and project, Project costs detail, Time by employee and project.

Why

Industry-tailored reports that have deeper project insights help you make confident decisions and drive performance.



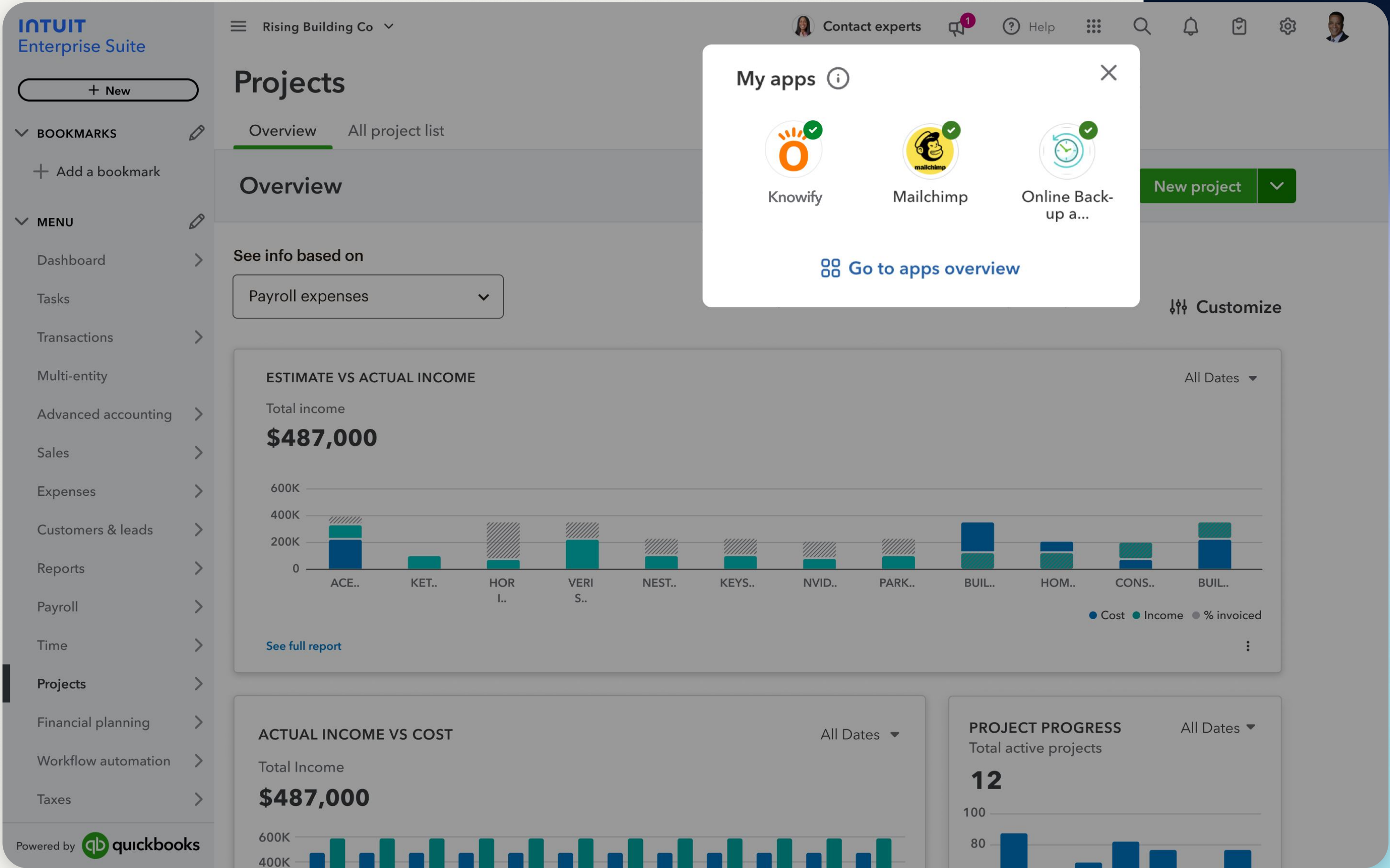
# Integration with Knowify

What

Sync project data and associated transactions between Intuit Enterprise Suite and Knowify.

Why

Streamline project accounting and improve data accuracy because you don't have to manually manage this data in both places.



# Payroll cost allocation

What

Assign multiple project or class values to a single employee within the same pay period for any wage item. If you use QuickBooks Time, these allocations will automatically transfer from QuickBooks Time.

Why

Save time and track labor costs with increased accuracy to specific categories. This gives you the detailed insights you need to boost profitability.

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| Reimbursement                                | -               | <div>\$0.00</div> | -          | <div>Residential</div> | <div>Daltonr: renovation</div> <div>+</div>               |

Cancel

Confirm

# Project manager role

What

Assign a specific user to the project manager role.

Why

Users with project manager permissions can only access project-related information, so you can protect your company's sensitive information.

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Help

Back

Add a new role

Role info

Role name\*  
Project Manager

Role description

Role permissions

Select what this role can access and do, or copy permissions from an existing role.

Project manager

Sales  
No access  
Invoice, Estimate, Sales receipt, Receive payments, Credit memo, Refund receipt, Delayed credit, Delayed change

Projects  
Full access  
Access project list, associated transactions, tasks, employee costs, estimates, change orders, and reports.

Inventory

Save role

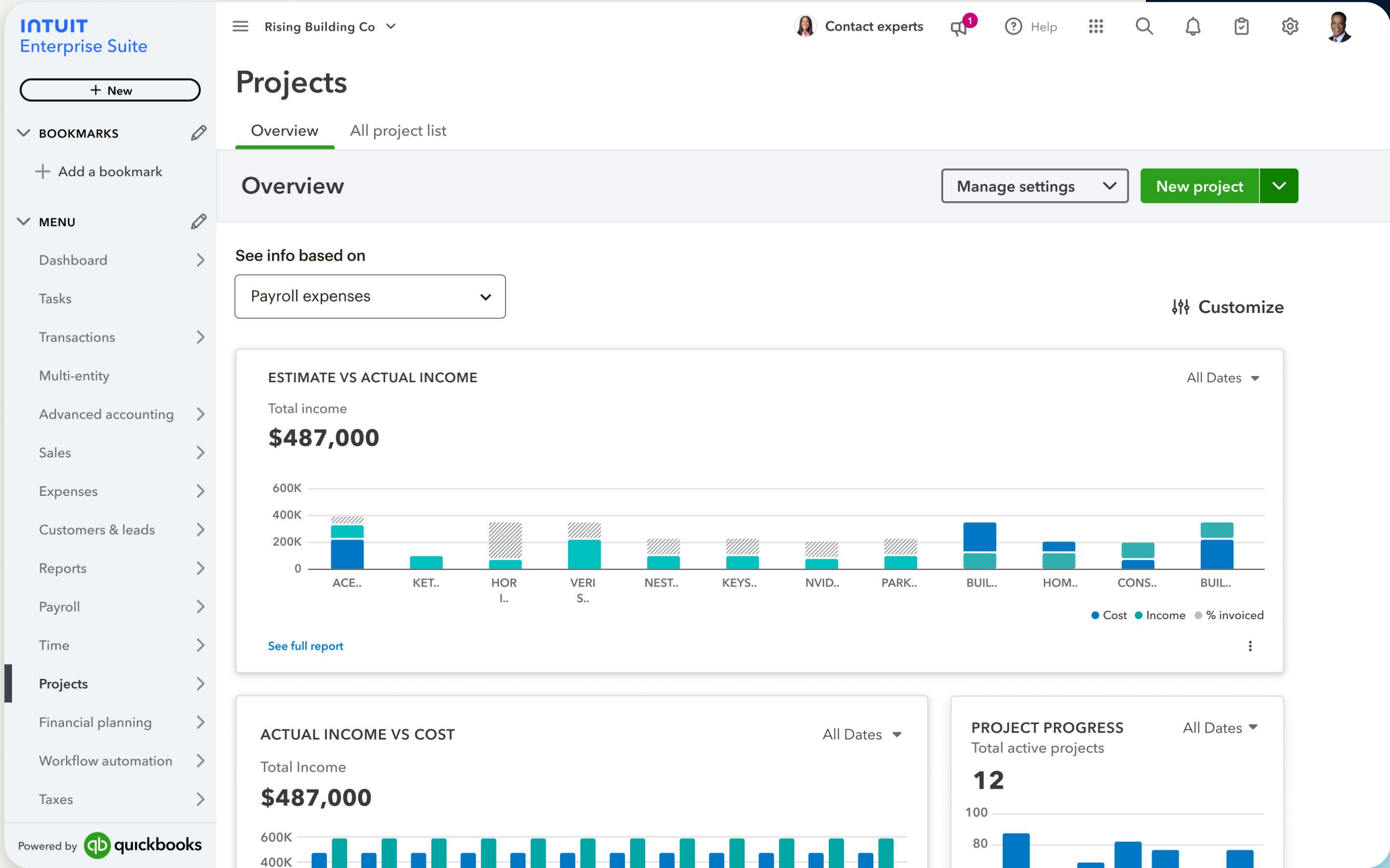
# Project overview dashboard

What

Customize the project overview dashboard and see top KPIs for projects in one place.

Why

Save time by monitoring all your projects in one place. Get actionable insights that can help you run your business with confidence.



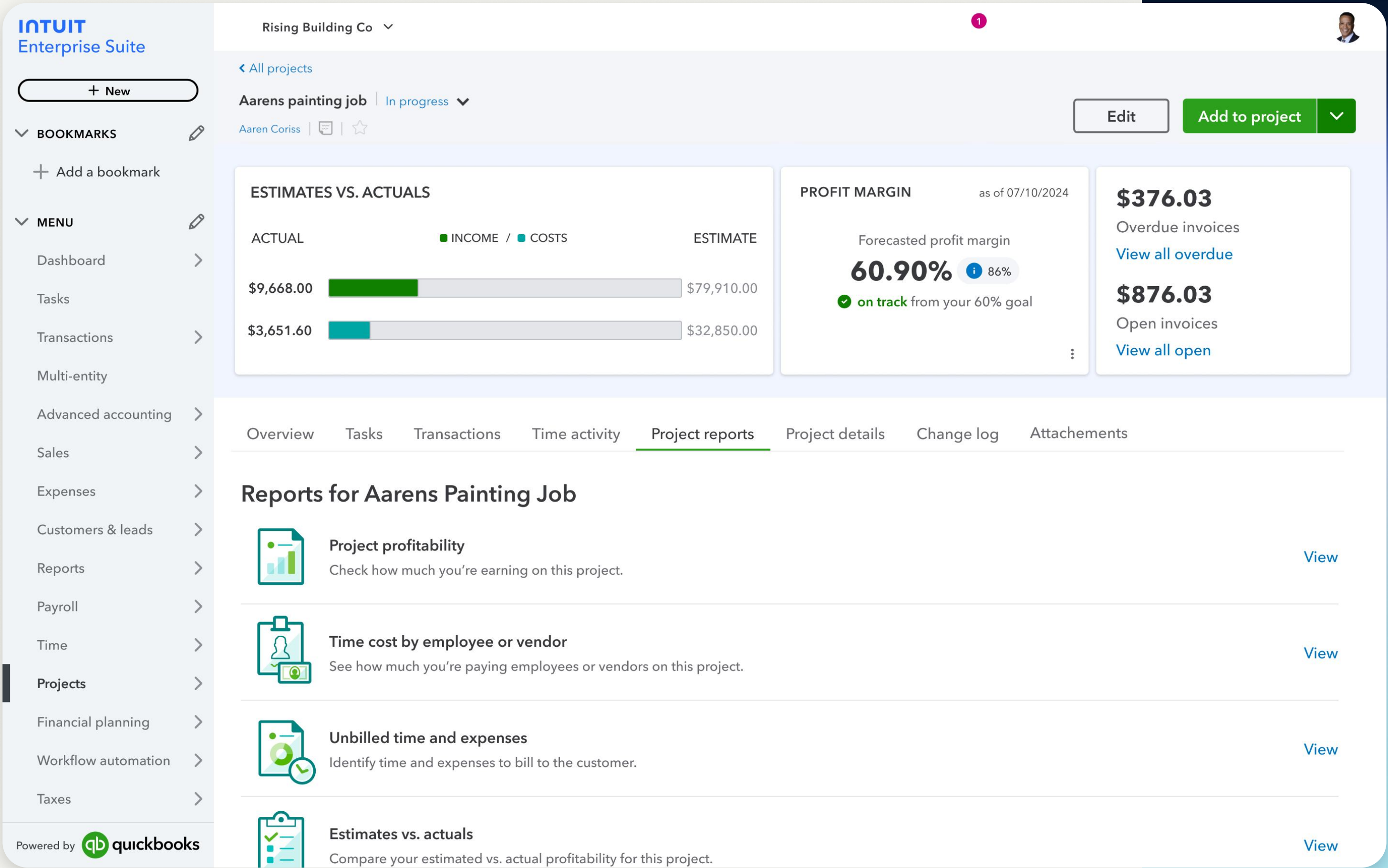
# Project profitability goal setting & monitoring

What

Set profitability goals for your projects based on AI-powered recommendations. We'll monitor your progress and proactively assess any issues that arise.

Why

AI-powered monitoring does the work for you, so you can address any issues before they impact your bottom line.



# Revenue recognition methods for projects

What

Easily track revenue using percentage-to-completion and project milestone methods.

Why

Save time and increase the accuracy of your financial data for revenue recognition.

Manage revenue recognition templates

| Template Name                 | Recognition Method                             |
|-------------------------------|------------------------------------------------|
| Even across periods, 12 mos   | STANDARD<br>Straight-line, even across periods |
| No. of days in period, 12 mos | STANDARD<br>Straight-line, prorated by days    |
| One-time                      | STANDARD<br>One-time future event              |
| Coffe purchase                | One-time future event                          |
| Annual coffee subscription    | Straight-line, even across periods             |

Add revenue recognition template

Template name

Name

Landscaping milestone

Recognition settings

Recognition method

Milestone

Schedule details

Enter the percentage of revenue to recognize for each milestone.

| Milestone  | Percent recognized |  |
|------------|--------------------|--|
| Deposit    | 40%                |  |
| Foundation | 30%                |  |
| Cementing  | 20%                |  |
| Completion | 10%                |  |

Add milestone

100/100 percentage distributed

Save