VOLUME 03 / LANDSCAPE BUSINESS

Finish well. Leave a clear handoff.

Completed scope, installed records, open items, care ownership, invoices and payments in one closeout process.

COMPLETED

Current scope checked

OPEN ITEMS

Named owners

CARE RECORD

Relevant instructions

FOLLOW-UP

Clear next action

WORKED EXAMPLES / CHECKLISTS / REUSABLE WORKSHEETS

Original practical business guidance. Examples are fictional. Adapt the records to your actual scope, costs and professional review.

02 / WALKTHROUGH

Close against the current scope.

A job can look complete while important records remain unfinished.

Use the latest reference

Bring the current scope, reviewed changes and installed-selection record. Compare named work areas with what was completed. Do not close against an obsolete plan because it is the copy that happens to be in the truck.

Separate the three lists

List completed included work, unfinished included work and new requests. Give each open item a named owner and a timing status. A newly requested enhancement should not silently become an unpaid punch-list obligation.

Record the customer conversation

Document the questions raised and the next response. A walkthrough is useful evidence of the discussion; it does not replace the actual agreement or settle every issue automatically.

Close against the right version

Identify the approved scope reference and one unresolved item that needs a named owner.

Your project note / reference

Responsible person / next action

03 / RECORDS

Leave an installed record worth keeping.

The handoff should describe what was actually installed.

Record the final selections

Identify the actual plants and products, quantities, sizes and reviewed substitutions. Link the current drawings, supplier information and applicable instructions. Record a missing document as an open item rather than implying it was delivered.

Keep private information private

Retain relevant project records through your normal process. Keep private addresses, access details and customer information out of public samples. Obtain the necessary permission before using actual property photos in marketing.

Make retrieval simple

Give the customer one organized handoff with the current version and a clear contact for questions. A scattered series of text messages is difficult for the next person to use when a care question appears later.

Give the next person a usable record

Write the missing selection or supplier document and who will deliver it.

Your project note / reference

Responsible person / next action

04 / CARE

Explain care with the right source.

Care depends on the installed work and the actual property.

Use appropriate instructions

Provide the relevant supplier or responsible professional guidance for the installed selections. Review the customer’s ability to perform the agreed care. Avoid one universal watering schedule for every climate, soil, season and plant.

Clarify responsibilities

Identify who checks establishment, how concerns are raised and what contractor work remains open. Point to the actual written warranty terms. Do not improvise a blanket promise that every plant loss is covered or that none can be.

Know the limits of the fieldbook

EPA WaterSense discusses matching plant choices to site conditions; University of Maryland Extension covers site inventory and planning. Those sources are useful context. They do not turn this business checklist into a site-specific horticultural prescription.

Use a source that fits the installation

Record the actual care-information source, customer responsibility and contact for questions.

Your project note / reference

Responsible person / next action

05 / OPEN ITEMS

Give every open item a next action.

An owner and a clear update are more useful than an optimistic date.

Write the item so it can be checked

Describe the area, outstanding work or missing document. Identify whether it belongs to the included scope, an agreed change or a new request. Assign a person and state whether the timing is proposed or confirmed.

Separate a care question from an installation defect

Record the customer’s observation first. Arrange appropriate review before deciding the cause or remedy. Keep the communication factual and preserve the current records.

Close the loop

When an item is resolved, record what was done and communicate the result. If it cannot be resolved yet, explain the next review or decision. Do not let an invoice status erase an open work item.

Open-item record	Your entry
Item / current-scope reference	_____
Responsible person / next update	_____
Proposed or confirmed timing	_____

06 / INVOICE

An invoice connects work to an amount due.

It should reflect the reviewed scope and accepted changes.

Start with the current work

Show base scope and accepted changes separately when that helps the customer reconcile the total. Apply your actual discount and tax treatment. A generated invoice does not decide local tax rules or process a payment.

Separate requested and received deposits

Only subtract money actually received. In the fictional example, the revised total is $2,309.34 and the received deposit is $500. At invoice issue, the amount due is $1,809.34.

Give a specific next step

State the agreed due date or milestone and your real payment instructions. This example includes no payment destination and no real transfer. Use your normal accounting and recordkeeping process.

Invoice WC-01-I	Fictional amount
Base / accepted change	$2,069.34 / $240.00
Total before any applicable tax	$2,309.34
Deposit actually received / amount due	$500 / $1,809.34

07 / RECEIPT

Record this payment once.

A partial-payment receipt should not call the project paid in full.

Keep earlier payments separate

For invoice WC-01-I, the earlier $500 deposit stays in prior payments. The next fictional payment is $1,000. Do not enter the new payment in both fields.

Reconcile the remaining balance

Invoice total $2,309.34 less prior $500 and this payment $1,000 leaves $809.34. The receipt states that a balance remains. It records an event in the fictional scenario; the tool does not collect money.

Use a safe reference

A check or payment-provider reference can help reconcile records. Do not put full banking credentials, card numbers or sensitive account information in the document. Save a working copy appropriately if it contains private project details.

Receipt WC-01-R	Fictional amount
Invoice total	$2,309.34
Prior / this payment	$500 / $1,000
Still due / status	$809.34 / partial payment

Separate this payment from earlier payments

Record the invoice reference, actual new payment, prior payments and remaining balance.

08 / WORKSHEET

Make the handoff complete.

Use a dated working record, with a responsible person for anything open.

Current scope / accepted changes checked

Installed-selection and instruction records delivered

Open items / named owner / next update

Care responsibilities / source of instructions

Invoice / actual received payments / balance

Follow-up status / contact / closure record

Use the FREE tools and the completed Willow Court project: bookedworkpro.com/resources/landscaping

Background: EPA WaterSense - epa.gov/watersense/landscaping-tips; UMD Extension - extension.umd.edu/resource/landscape-planning. Technical suitability, actual care and local requirements need appropriate review.

Fictional amounts are USD; tax is omitted for the worked arithmetic only. This is a business planning resource, not an installation specification, legal contract or guaranteed profit model.