



Sailboats USA

practical resources for DIY sailboat owners



THE HEELING LIST · FOR MARINE INDUSTRY BUSINESSES

Vendor Pro Guide

How to join The Heeling List as a Sailboats USA Pro, receive job requests from sailboat owners near you, send professional quotes and invoices, and export your records — free during launch, no lead fees, no commissions.

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sailboatsusa.com/pro.html • contact@sailboatsusa.com

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PART 1 OF 5

Joining the Pro Program

On The Heeling List, sailboat owners post the work they need done. Approved Pros in the right trade and area see those requests, reply, and send quotes. Here's how to get set up.

- 1.1 What the Pro Program Is
- 1.2 Claiming Your Business Listing
- 1.3 Applying to Be a Pro
- 1.4 Approval, Badges & Your Pro Account

1.1 What the Pro Program Is



The Heeling List

Sailboats USA's service for connecting sailboat owners with trusted local marine pros. Owners find it at sailboatsusa.com/get-quotes.html; you'll see it as **Heeling List Job Leads**.

Sailboats USA is a free resource used by DIY sailboat owners across the US and Canada. On **The Heeling List** (formerly "Get Quotes"), owners describe work they need — rigging, diesel, canvas, electrical, bottom paint, surveys, and more — along with where the boat is, photos, timing, and budget.

- **Approved Pros** see open requests in their trades within their travel radius and can reply and send quotes.
- **Owners can also invite you directly** if they already know your business.
- **It's free during launch** — no subscription, no lead fees, no commissions. If that ever changes, you'll get at least 30 days' notice and can opt out first.
- **We never touch your money.** Quotes and invoices are your documents; owners pay you directly by the methods you choose.

1.2 Claiming Your Business Listing

sailboatsusa.com/vendors.html

Every Pro is tied to a listing in the Marine Vendor Directory, so owners can see your ratings and reviews.

1. Search the directory for your business. If it's there, open it and click **This Is My Business — Claim It**.
2. If it isn't listed, click **+ Add a Vendor**, enter your details, and post it (the form asks for a first rating).
3. Once claimed you'll see **"You manage this listing"** and can add your logo, years in service, services offered, website, phone, and email.

Tip: a logo and a complete, accurate listing make a real difference — your logo also appears at the top of your quote and invoice PDFs.

1.3 Applying to Be a Pro

sailboatsusa.com/pro.html

1. Sign in and open **Become a Pro** (also linked from your listing page).
2. Choose your claimed listing and enter a contact name, business phone and email, and years in business.
3. Pick up to **6 services** you want requests for — choose the trades you actually do.
4. Enter your **home base ZIP / postal code** (shop, yard, or home port) and **how far you'll travel** (10–250 miles).

5. Tell us about insurance (carrier if insured), licenses and certifications (e.g. ABYC, USCG, SAMS/NAMS, state contractor number), and your experience and specialties.
6. Read the summary of your responsibilities, tick the box to agree to the **Pro Services Terms & Disclaimers**, and click **Submit Application**.

1.4 Approval, Badges & Your Pro Account

Applications are reviewed by hand, usually within a few days. Your status on **pro.html** shows one of:

- **Under review** — nothing to do yet.
- **✓ Approved Pro** — your listing gets a  badge and you get **Job Leads**.
- **Not approved yet** — you'll see a note explaining why; update your details and resubmit.
- **Suspended** — Pro access is paused; the note explains why. Contact us with questions.

Once approved, your Pro account page lets you change your **services**, **service area and radius**, and whether you receive **job-lead emails** — no re-review needed. It also links to Heeling List Job Leads, Messages, **My Quotes & Invoices**, and your public listing.

PART 2 OF 5

Winning Work

See requests that match your trades and area, reply with something useful, and keep the conversation going in Messages until you're hired.

- 2.1 Finding Job Leads
- 2.2 Replying to an Owner
- 2.3 When an Owner Invites You
- 2.4 Messaging & Getting Hired

2.1 Finding Job Leads

sailboatsusa.com/job-leads.html

- **Heeling List Job Leads** lists open requests in **your trades** within **your travel radius**, closest first. Tick **Also show other trades nearby** to see everything in your area.
- Each lead shows the work, whether the boat is **in or out of the water** and where it's kept (marina slip, mooring, boatyard, trailer...), the boat, timing, budget, photos, approximate distance, and how many businesses have replied.
- For the owner's privacy you see the town/ZIP area — never their email, street address, or slip number.
- If job-lead emails are on, you'll get an email when a matching request is posted.

 **Sailboats USA**
practical resources for DIY sailboat owners

 **Heeling List Job Leads**

Open requests within **50 miles** of Annapolis, MD for **Rigging, Mast & Climbing Services**.

Replace chafed main halyard on a Catalina 30
Rigging · Annapolis, MD 21403 · **~3 mi away** · posted today · 1 reply
When: Within a month · **Boat is:** Out of the water · Boatyard (on the hard) · **Budget:** Under \$500

Introduce your business, ask any questions, and give a ballpark or next step...

Send Reply →

A job lead (sample).

2.2 Replying to an Owner

Write a short, specific reply and click **Send Reply**. It goes to the owner's Messages inbox under your business name, and appears on their request with your badges and star rating. You can reply once per request — continue in Messages after that.

Replies that win work: mention relevant experience with that boat or job, ask the one or two questions you need answered, give a realistic ballpark or next step (an inspection visit, measurements), and say when you're available. Only reply to jobs you can actually do.

2.3 When an Owner Invites You

Owners can invite a business they already know — even one that isn't a Pro yet.

- **If you already have an account** on your claimed listing, you'll get a note in Messages and the job appears under **Jobs you were invited to** on Job Leads.
- **If you were invited by email**, open the link and sign in or create a free account **with that same email address**. You'll be asked to **verify the email** (click the link we send, then **I've verified — show the job**).
- Invited businesses can see, reply to, and quote **only that job**. To receive requests from other owners, apply to become a Pro.

2.4 Messaging & Getting Hired

- Use **Messages** for questions, scheduling, access details (gate codes, slip numbers), and photos — the owner shares private details there once they choose you.
- When the owner picks you, they click **Mark as hired**. The job then appears under **Jobs you were hired for**, with buttons to create a quote or invoice even after the request closes.
- Keep job communication on the site so there's a record for both of you.

Messages tools

sailboatsusa.com/messages.html

- **Formatting:** the toolbar above the message box adds **bold**, *italic*, underline, strikethrough, bulleted and numbered lists, quotes, and links — handy for a scope of work or a checklist. **Enter** sends; **Shift+Enter** starts a new line.
- **Links:** any web address or email you type becomes clickable automatically, including the quote and invoice links the site sends for you.
- **Archive: Options** → **Archive Conversation** moves a finished job out of your inbox. It lives under the **Archived** tab and comes back to your inbox automatically if the owner writes again.
- **Search:** the search box above your conversations finds names and words in any message, inbox or archived. Click a result to jump straight to that message.

PART 3 OF 5

Quotes & Invoices

Send an itemized quote, and when the owner accepts, flip it into an invoice in one click. Add any extra charges, list your payment options, then download PDFs or export everything to Excel or QuickBooks Online. No payment ever passes through Sailboats USA.

- 3.1 Building a Quote
- 3.2 Extra Charges, Discounts & Tax
- 3.3 Sending, Editing & Withdrawing
- 3.4 Converting a Quote to an Invoice
- 3.5 Payment Options, Paid & Void
- 3.6 PDFs, Numbering & Your Defaults
- 3.7 Downloading & Exporting
- 3.8 Requesting a Connection to Your Software

3.1 Building a Quote

sailboatsusa.com/quote.html

1. After replying to a request (or from **Jobs you were hired for**), click  **Create Quote**.
2. Your business details, the owner, the job, the boat, and where the boat is kept fill in automatically.
3. Edit the first line and add more with the buttons under the table. Enter a **quantity** and **unit price** for each line — amounts and totals update as you type.
4. Set **Valid until** and add **Notes & terms**: scope, what's included and excluded, warranty, schedule, deposit expectations.

3.2 Extra Charges, Discounts & Tax

Line button	Use it for
+ Labor	Hours × your rate
+ Parts	Materials and parts (marked taxable by default)
+ Delivery	Travel or delivery to the boat
+ Handling	Ordering, shipping, or handling fees
+ Misc / + Other	Anything else (haul-out coordination, disposal, shop supplies...)
+ Discount	Enter a positive amount; it's subtracted automatically
+ Tax	A named rate (e.g. "MD sales tax 6%") applied only to lines you tick as tax

Choose **USD** or **CAD** next to the total. Totals are calculated to the cent, but you're responsible for checking every line, rate, and tax before sending.

3.3 Sending, Editing & Withdrawing

- **Save Draft** keeps it private to you. **Send** shares it with the owner and drops a note with a link into their Messages.
- Until the owner responds you can edit and **Save Changes & Notify**, or **Withdraw** the quote.
- The owner can **Accept** or **Decline**, with an optional note; you're notified in Messages either way.



Harbor Rigging Co. (sample)

Annapolis, MD · (410) 555-0100

INVOICE

No. INV-0001 · Due Oct 27 · From quote Q-0001

Description	Qty	Unit	Amount
Labor: run new main halyard	2	\$95.00	\$190.00
Parts: 3/8" double-braid, 90 ft *	1	\$185.00	\$185.00
Delivery / travel · Handling	1	\$55.00	\$55.00
Discount	1	\$20.00	-\$20.00
Misc: replaced chafed sheave pin *	1	\$12.50	\$12.50
Subtotal			\$422.50
MD sales tax (6%)			\$11.85
Total (USD)			\$434.35

PAYMENT OPTIONS: Check payable to Harbor Rigging Co., or Zelle to billing@example.com

✓ Mark as Paid

Void

↓ Download PDF

An invoice converted from an accepted quote, with an extra charge added (sample figures).

3.4 Converting a Quote to an Invoice

1. Open the accepted quote (from Messages, or from **My Quotes & Invoices**) and click **Convert to Invoice**.
2. Every line is copied into a new draft invoice linked to the quote, with a due date 30 days out.
3. Add anything that came up during the job, adjust the due date, and check the totals.

You can also start an invoice directly from **Jobs you were hired for** → **+ Invoice**.

3.5 Payment Options, Paid & Void

- Enter your **payment options** — how the owner should pay you (check, Zelle, card at your office, etc.). You can't send an invoice without them. Never ask for payment by gift card.
- Owners pay you **directly, outside the site**. Sailboats USA doesn't verify, collect, or hold any payment.
- When you're paid, click **Mark as Paid** — a **PAID** stamp appears on screen and on the PDF. Use **Mark as unpaid** to undo, or **Void** to cancel an invoice.
- "Paid" is a record-keeping convenience only — it isn't a receipt issued by Sailboats USA.
- **Owners can keep your work in their Boat Log Book**. Once an invoice is marked Paid, the owner can add it to their maintenance log in one click — with the date, your business name, the cost, and every

line. Clear line descriptions (“Replaced raw-water pump impeller, Jabsco 1210-0001”) make that record useful for years — and remind them who did the work.

3.6 PDFs, Numbering & Your Defaults

- **Download PDF** or **Print** any quote or invoice — with your logo, business details, all lines, totals, notes, and payment options. Keep your own copies.
- Pros get their own sequential numbers: **Q-0001**, **Q-0002...** and **INV-0001...** (Invited businesses that aren't Pros get date-based numbers.)
- Tick **Save my tax, currency, notes and payment options as defaults** and they'll pre-fill every new document.
- Everything you've created is listed on **My Quotes & Invoices** (next section), with status and totals.

3.7 Downloading & Exporting: PDF, ZIP, Excel & QuickBooks

sailboatsusa.com/pro-documents.html

Open **My Quotes & Invoices** from your Pro account page or Job Leads. At the top you'll see quotes awaiting a reply, unpaid and paid totals, and a count of your documents. Narrow the list with the **type**, **status**, **date range**, and **search** filters.

What you want	How
One PDF	Click ↓ PDF on its row.
One combined PDF	Tick the documents you want (or tick none to use everything the filters show) and click One combined PDF . Each document starts on a new page — ideal for printing a month's invoices.
A ZIP of PDFs	Same selection, then ZIP of PDFs — one file per document, named by number and customer. Good for emailing your bookkeeper.
Excel workbook	Under Export to Excel , choose invoices, quotes, and/or customers and click Download Excel (.xlsx) . You get separate sheets for invoices, invoice lines, quotes, quote lines, and customers (with totals invoiced and paid).
QuickBooks Online	Download Customers CSV and Invoices CSV , then import them into QuickBooks (below).

Importing into QuickBooks Online

1. **Customers first.** In QuickBooks Online go to **Settings** ⚙ → **Import data** → **Customers**, upload the Customers CSV, check the column matches, and import.
2. **Then invoices.** Go to **Settings** ⚙ → **Import data** → **Invoices**, upload the Invoices CSV, and map the columns (invoice number, customer, dates, product/service, description, quantity, rate, amount, taxable). Each line of each invoice is one row.

3. Products/services are named by line type (**Labor, Parts, Delivery, Handling, Misc, Discount...**). QuickBooks can create any it doesn't have yet.
4. **Sales tax:** the file marks each line as taxable or not; QuickBooks applies *your* tax settings on import, so check the totals match.

Good to know: only **sent** and **paid** invoices are included — drafts and voided invoices are left out. Dates use the US format (MM/DD/YYYY). If your QuickBooks company is set to a different date format, change it in the import screen. Always review a small import first; you're responsible for your own books.

3.8 Requesting a Connection to Your Software

Right now Sailboats USA gives you files to import yourself. If you'd like your quotes, invoices, or customers to flow directly into the software you already use — **QuickBooks Online, QuickBooks Desktop, Xero, Sage Intacct, Sage 50, NetSuite, FreshBooks, Wave, Zoho Books, Microsoft Dynamics 365 Business Central**, or something else — tell us:

1. On **My Quotes & Invoices**, scroll to **Request an integration**.
2. Choose your software (or **Other** and type its name), tick what you'd want synced (invoices, quotes, customers, payments received, products & services), and add any notes.
3. Click **Send Request**. Your requests are listed underneath with their status — **Received, Reviewing, Planned, Available, or Not planned** — and any reply from our team.

Requests help us decide which connections to build first; they aren't a promise that a connection will be built or a date. One request per software is enough — we'll update its status as things change.

PART 4 OF 5

Your Reputation

Owners choose businesses by their reviews. Here's how ratings and badges work — and how to earn good ones.

4.1 Reviews, Ratings & “Verified Job”

4.2 Pro & Preferred Badges

4.3 Your Sailor Profile & Certifications

4.1 Reviews, Ratings & “Verified Job”

- Members rate your business overall plus **price, communication, timeliness, and expertise**. Averages show on your listing and next to every reply you send.
- When an owner who hired you through The Heeling List reviews you, the review is tagged  **Verified job**.
- Ask satisfied customers to leave a review — but never offer anything in exchange, and never review your own business or a competitor.
- We don't remove reviews just because they're negative. If a review breaks the rules (personal information, threats, not a real customer), report it to us.

4.2 Pro & Preferred Badges

-  **Pro** shows your application was approved. It isn't a license check or endorsement.
-  **Preferred** is an editorial designation chosen by Sailboats USA; Preferred businesses are listed first in the directory. It can't be requested or bought.
- Badges can be removed if a business breaks these rules or receives serious complaints.

4.3 Your Sailor Profile & Certifications

sailboatsusa.com/sailor-profile.html



Every member can keep a **Sailor Profile** of their skills, certifications, and goals. For your business's people it's a simple way to show credentials — ABYC, USCG licenses, NMEA, first aid, and more.

- Add each certification with issuer, earned date, and expiry. They show as *self-reported* until verified.
- Upload a photo or PDF of the card or certificate (only you and Sailboats USA admins can see it) and request a  **Verified** tag — it means an admin saw the document, not an endorsement.
- You choose who sees each part of your profile: only you, people you offer to help, signed-in members, or everyone.

PART 5 OF 5

Rules, Responsibilities & Help

The short version of the Pro Services Terms & Disclaimers, the conduct we expect, answers to common questions, and how to reach us.

- 5.1 Your Responsibilities as an Independent Business
- 5.2 Conduct Rules
- 5.3 Frequently Asked Questions
- 5.4 Getting Help

5.1 Your Responsibilities as an Independent Business

- You're solely responsible for your work and workmanship, warranties, safety, employees and subcontractors, and for every **license, permit, registration, and insurance policy** required where you work.
- Quotes and invoices are **your documents** — you're responsible for every line, rate, tax, total, and term, and for the payment options you list.
- You're responsible for determining, charging, collecting, and remitting any **sales/use tax**, and for your own income-tax reporting and records.
- Sailboats USA is **not a party** to your agreements with owners, doesn't guarantee any number of requests, and doesn't collect or process payments.
- Approval is at our discretion and can be suspended or removed.

Full terms: sailboatsusa.com/pro-terms.html · Privacy Policy: sailboatsusa.com/privacy.html

5.2 Conduct Rules

- ☐ Keep everything in your listing, application, replies, quotes, and invoices true and current.
- ☐ Reply only to jobs you can do; be clear about what a price includes.
- ☐ Use owner information only to respond to and perform that owner's job — no marketing lists, no sharing.
- ☐ No spam, bulk marketing, harassment, or pressure tactics.
- ☐ Don't ask owners to move off-site to avoid reviews, and never request payment by gift card or unusual methods.
- ☐ No fake reviews, and nothing of value in exchange for a review.

Owners and other members can report a request, reply, or document. Our admins review reports and may remove content, suspend Pro status, or ban accounts.

5.3 Frequently Asked Questions

Does it cost anything?

No — the Pro program is free during launch, with no lead fees or commissions. Any future change comes with at least 30 days' notice.

Why don't I see a request I heard about?

Leads are filtered to your trades and travel radius. Tick "Also show other trades nearby," or widen your services or radius on your Pro account page. Closed or hired requests no longer appear.

Can I reply more than once?

One reply per request — continue the conversation in Messages.

Can I change a quote after sending it?

Yes, until the owner accepts or declines: edit it and click Save Changes & Notify, or withdraw it.

How do I get paid?

Directly by the owner, using the payment options on your invoice. Sailboats USA never handles payments.

I was invited by email but can't see the job.

Sign in with the exact email the invite was sent to and verify it. If the owner closed the request or removed the invite, it won't appear.

Can I get my invoices into QuickBooks?

Yes — download the QuickBooks Online Customers and Invoices CSV files from My Quotes & Invoices and import them (section 3.7). For other software, use the Excel export.

Can you connect directly to my accounting software?

Not yet. Send an integration request (section 3.8) — the most-requested systems get built first.

How do I find an old conversation?

Use the search box on Messages — it searches every message, including archived ones.

Can my business find helpers through Learn the Ropes?

Only as

paid

work. Unpaid volunteer help is for personal boats only — a boat or job that's part of a business must pay helpers, and you're responsible for any employment, tax, and insurance obligations.

An owner mentioned their Refit Registry — what is it?

A wish list of parts for their refit that friends and fans can buy them. It's separate from your quotes and invoices; Sailboats USA never handles money for either.

How do I stop job-lead emails?

Untick "Email me when a matching job request is posted" on your Pro account page.

5.4 Getting Help

Questions about your application, a problem with an owner, or a correction to your listing? Email contact@sailboatsusa.com, or use **Report Inaccurate Content** on the site. For a problem with a specific request or document, use its **Report** link.

Sailboats USA (including The Heeling List) connects sailboat owners and marine businesses but is not a party to any agreement between them, does not guarantee any work, and does not process payments. This guide summarizes how the site works; the Pro Services Terms & Disclaimers govern.