Run generator servicing from schedule to invoice

Generator service · How it works in TimeTap · November 2026

TimeTap keeps every generator you look after on its service schedule, books the visit with the client, gives your technicians the service checklist on their phone, sends the service certificate and invoices the job — in one flow.

Screens shown are from *PowerOn Generator Services (a demo company)* — all names and numbers are made up.

At a glance

Step	What happens	Who	Where
1	Add the generator and link it to the client	Office	Assets → Add Asset
2	Put the asset on a service schedule	Office	Asset → Service Schedules → Enroll in Schedule
3	Pending job cards are created for you	TimeTap	Job Cards → Jobs
4	Confirm the date with the client, then commit	Office	Job card → Visit date
5	The technician does the service on the staff app	Technician	Staff app → Jobs
6	The certificate is created and sent	TimeTap	Job card → Service
7	Invoice the job	Office	Job card → Quote & Invoice
8	Every visit in the client's history	Office	Clients → the client → Checklists

Set up once

- ☐ **Schedule type** — e.g. *Quarterly generator service* (every 3 months, 14 days notice).
- ☐ **Job type** with the *Generator Service Checklist* and the *Generator Service Certificate*.
- ☐ **Certificate** — letterhead, footer and signature.
- ☐ **Clients** with a cellphone number for the contact person.
- ☐ **Technicians** signed in to the staff app with notifications on.

WHAT THE CHECKLIST COVERS

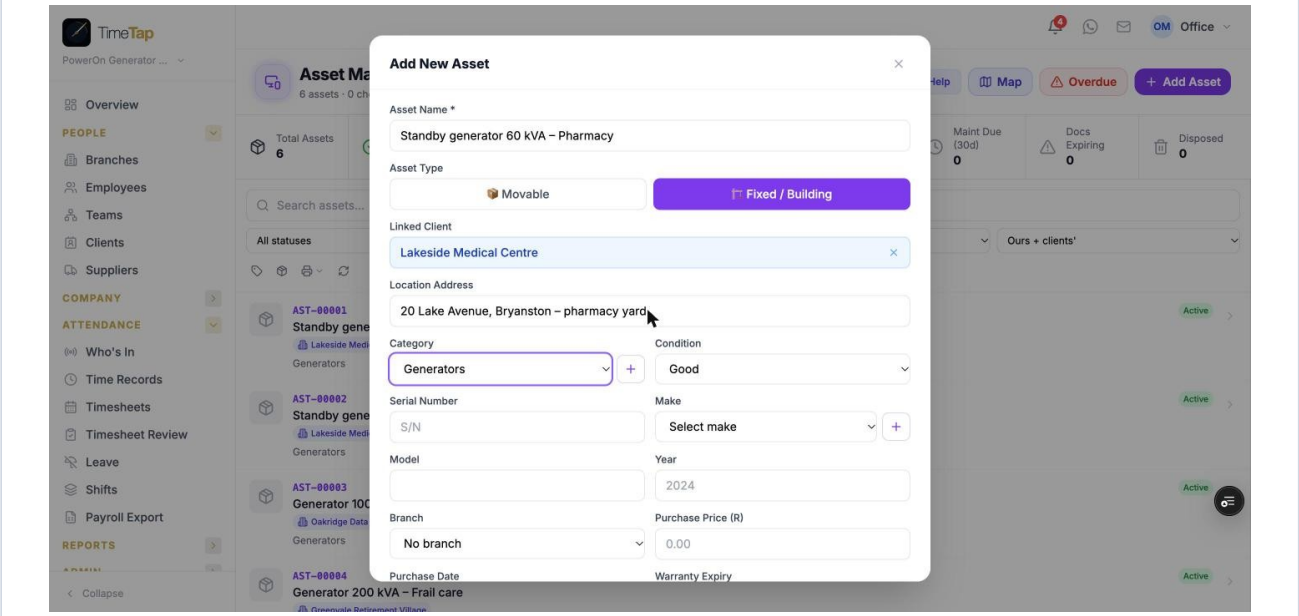
Engine oil and oil filter · Fuel filter · Air filter · Coolant level and condition · Fan belt · Battery and charger · Fuel level · Leak check · Run test under load · Changeover (ATS) test · Hour meter reading · Battery voltage (V) · Photos of hour meter and panel · Result: ready for standby / follow-up

1. Add the generator and link it to the client

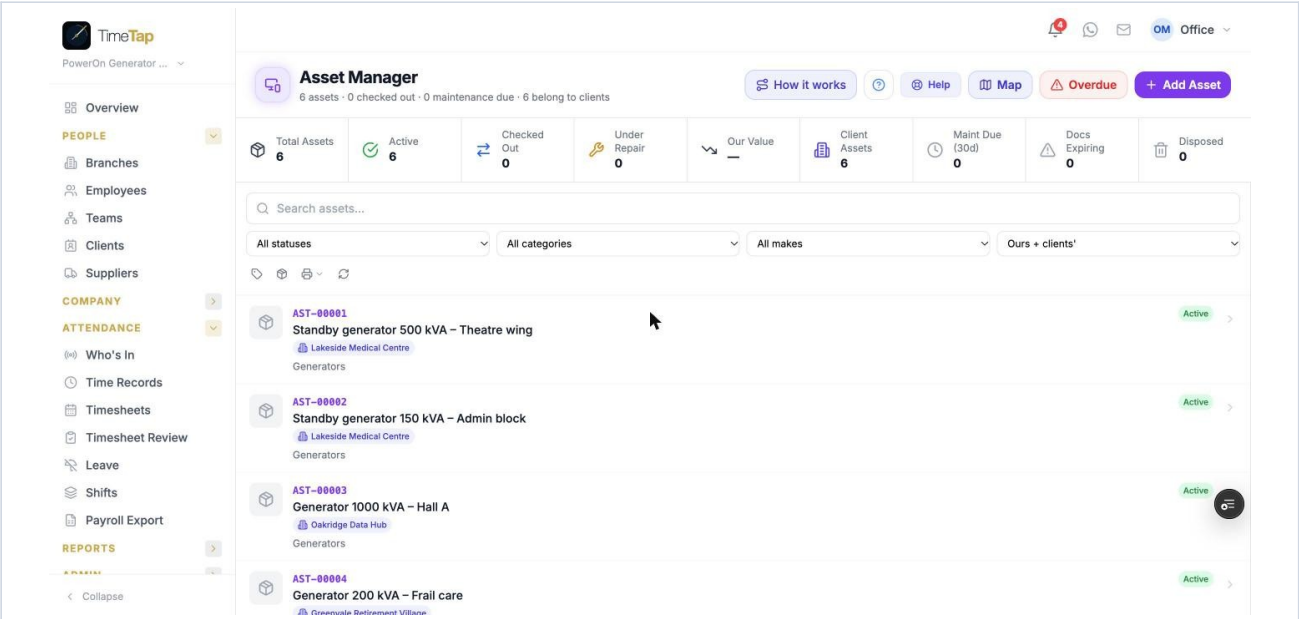
Where: Assets → Add Asset

Every generator you look after is an asset in TimeTap, linked to the client who owns it and to the address where it is installed. One generator = one asset — a site with three generators gets three assets.

- **Asset Name** — what the technician will recognise on site.
- **Asset Type** — choose **Fixed / Building** for an installed unit.
- **Linked Client** — ties every job, checklist, certificate and invoice to that client.
- **Location Address** — the exact installation address the technician drives to.
- **Category** — optional; a category with a service interval gives a next-due date even before a schedule exists.



Adding a new asset, linked to the client and its installation address



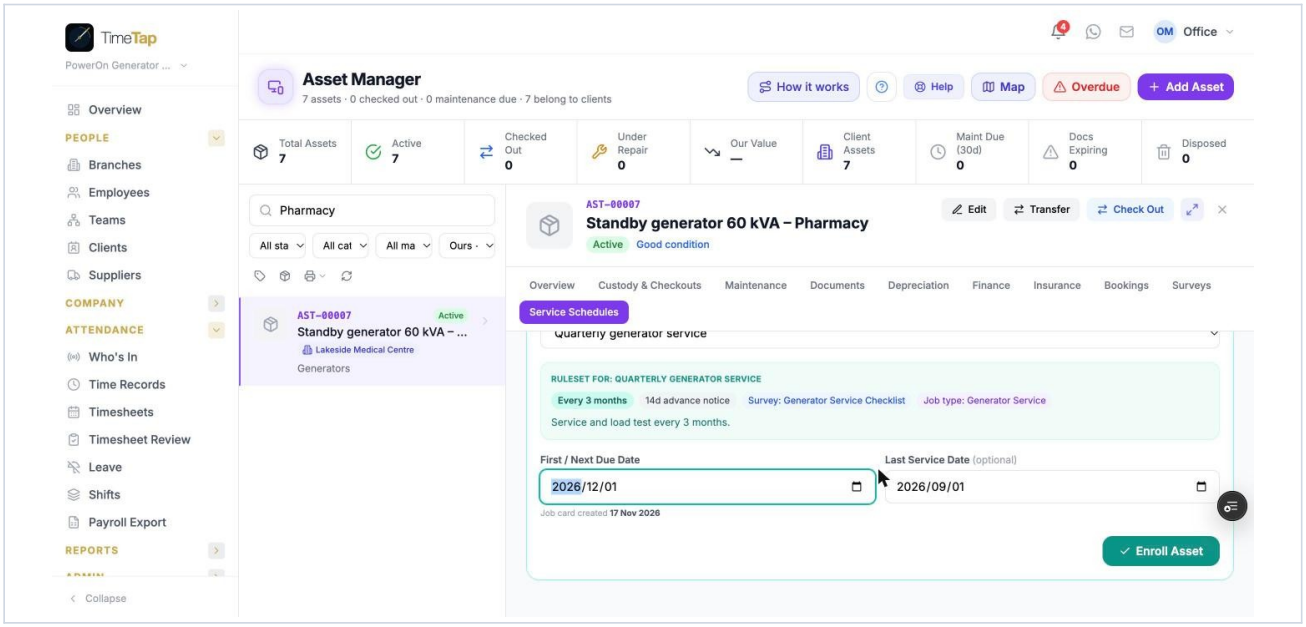
The asset register: every unit, its client and its status

2. Put the asset on a service schedule

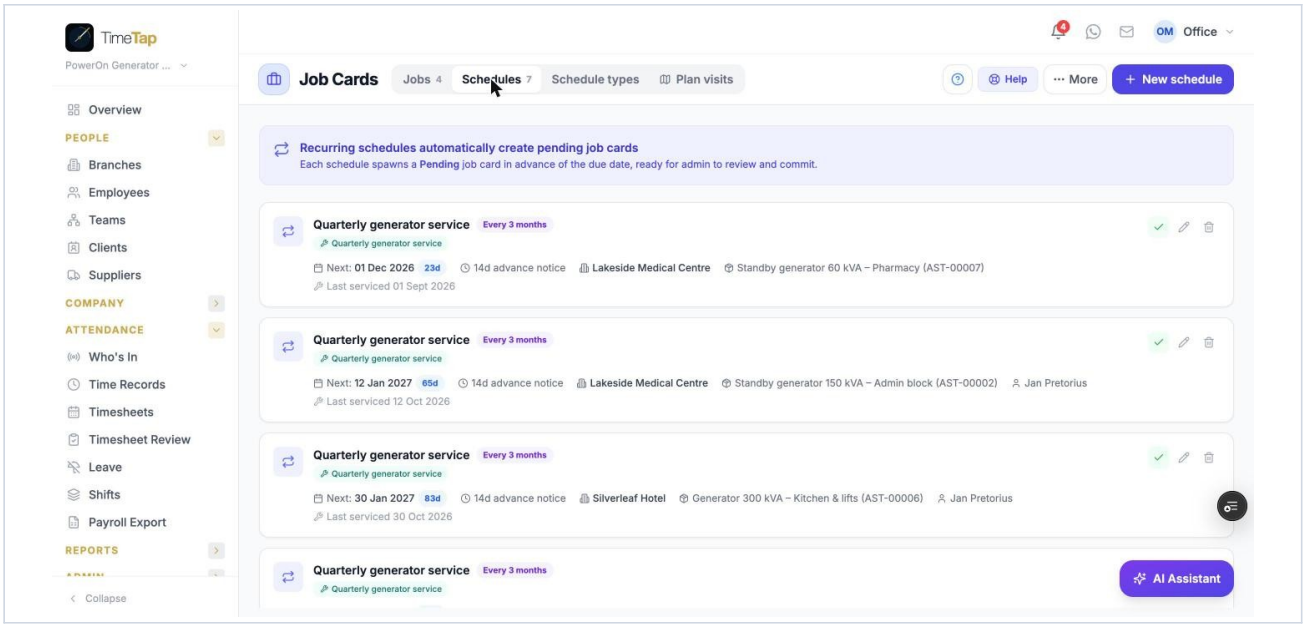
Where: Asset → Service Schedules → Enroll in Schedule

A schedule is what makes TimeTap create the job cards for you. Pick the schedule type (for example *Quarterly generator service*) — it brings the frequency, how many days ahead the job card is made, the checklist and the job type. Enter the first due date and, if you know it, the last service date.

- All schedules are also listed under **Job Cards → Schedules**, with the next due date, client, asset and technician.



Enrolling the asset in the quarterly generator service schedule — the ruleset shows what it brings



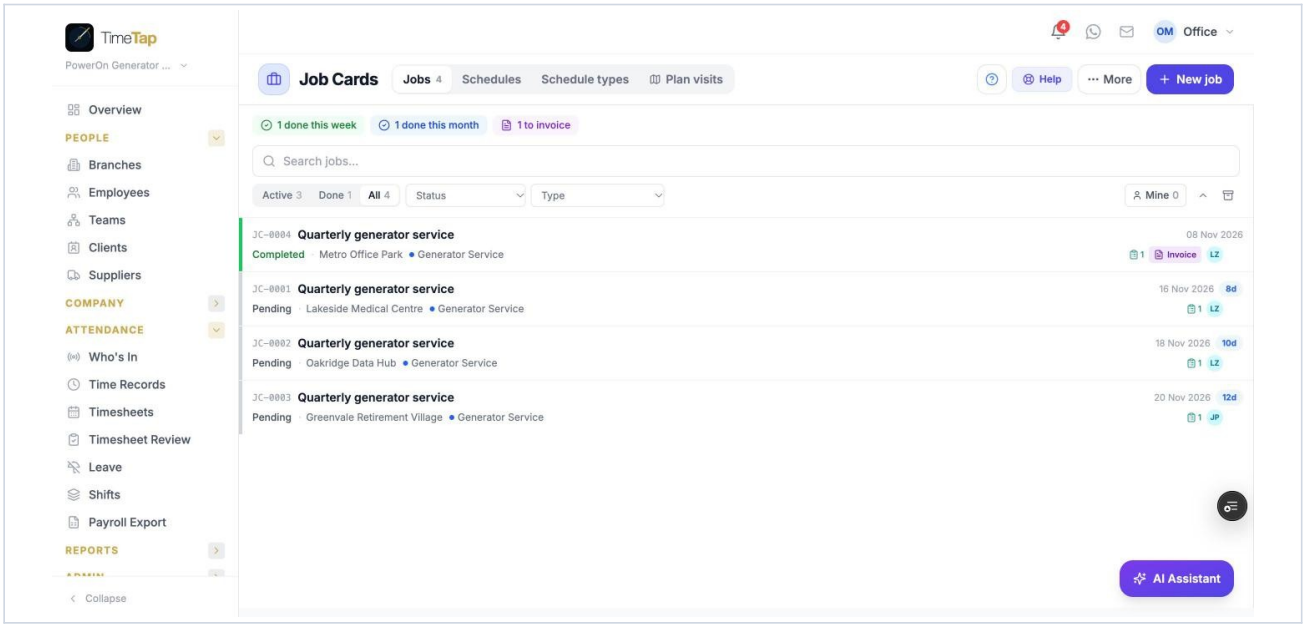
Job Cards → Schedules: every asset on a schedule, with its next due date

3. Pending job cards are created for you

Where: Job Cards → Jobs

When a service comes due (14 days ahead by default), TimeTap creates a **Pending** job card with the client, asset, address, checklist and technician already filled in. Pending means the date is still a proposal — nobody has agreed to it yet.

- **Plan visits** shows pending jobs close to each other, so one trip can cover several sites.



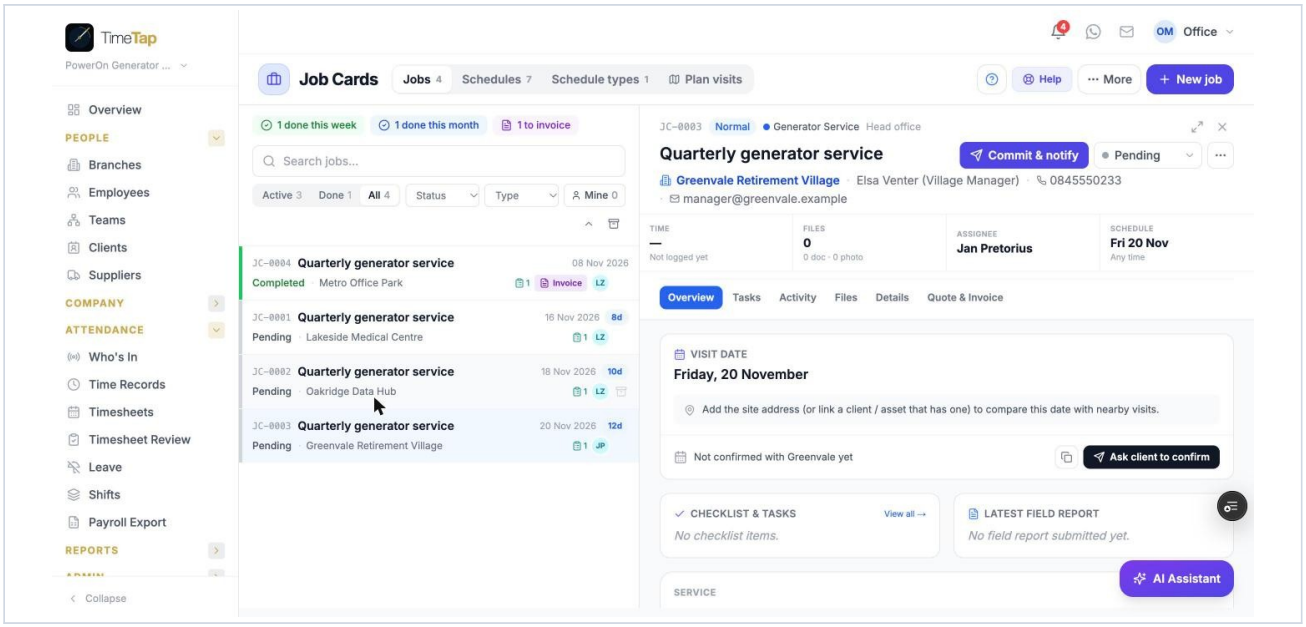
Pending job cards waiting for the office

4. Confirm the date with the client, then commit

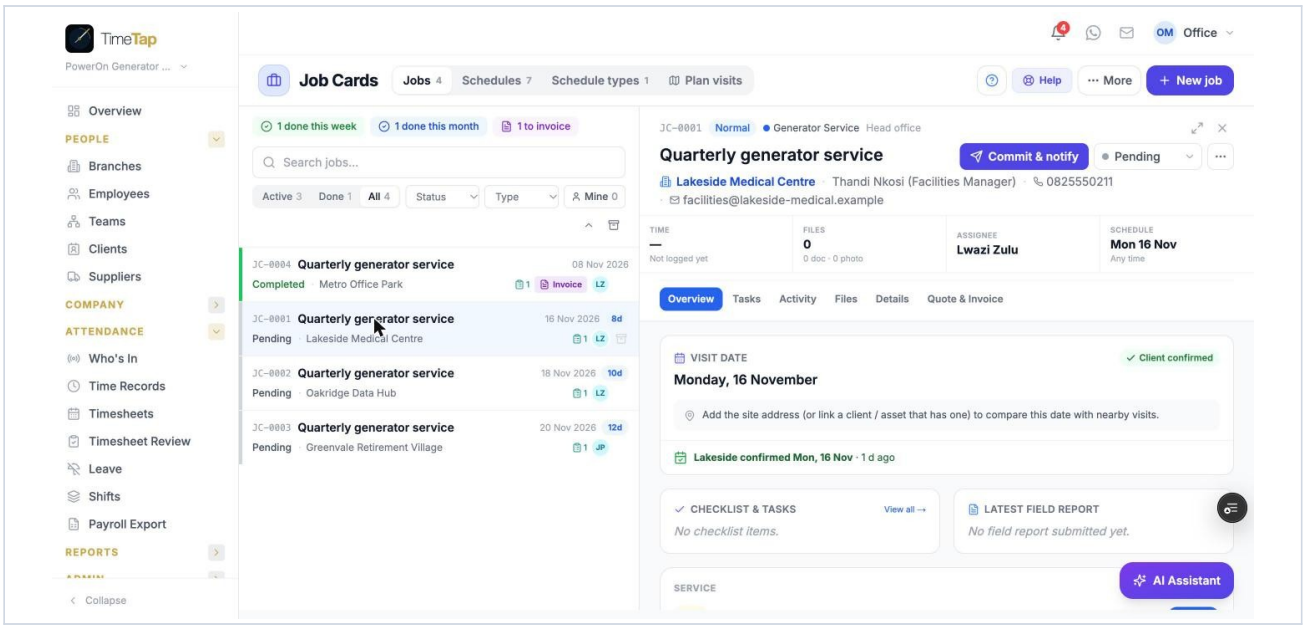
Where: Job card → Visit date

Open the pending job card. On the **Visit date** card, tap **Ask client to confirm** — the client gets a WhatsApp to accept the date or ask for another day. (This needs a cellphone number on the job, the contact person or the client.)

When the card shows **Client confirmed**, tap **Commit & notify**: the job is booked and the technician is notified on the staff app.



A pending job not yet confirmed — Ask client to confirm



The client confirmed — Commit & notify books the job

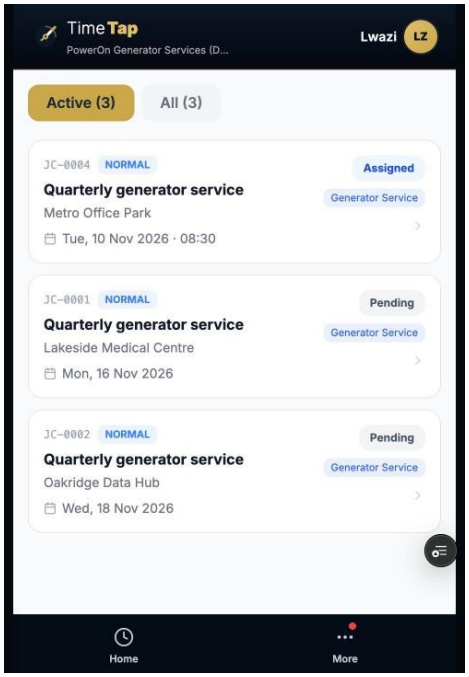
5. The technician does the service on the staff app

> **Where:** Staff app → Jobs

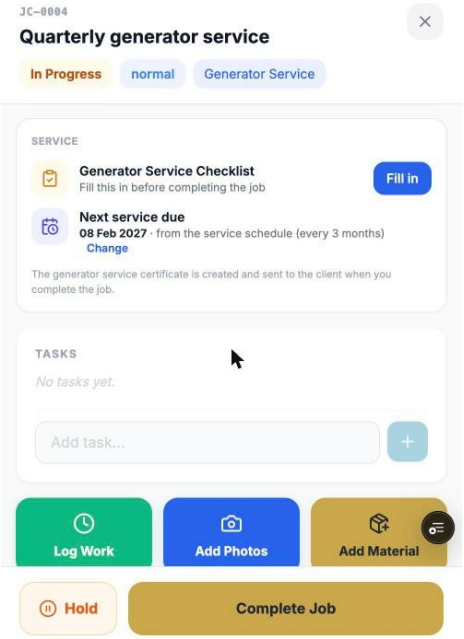
The technician opens the job on their phone, taps **Start Job** on site (the location is recorded) and fills in the **Generator Service Checklist**. The job cannot be completed until the checklist is filled in.

They finish with **Complete Job**: their signature and the client's signature on the phone (or a sign-off link if the client is not there).

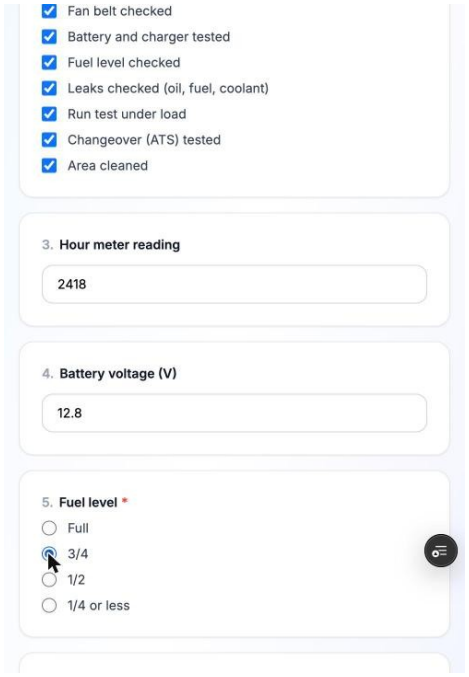
- Readings such as the hour meter and battery voltage are captured as numbers, so they can be compared visit after visit.



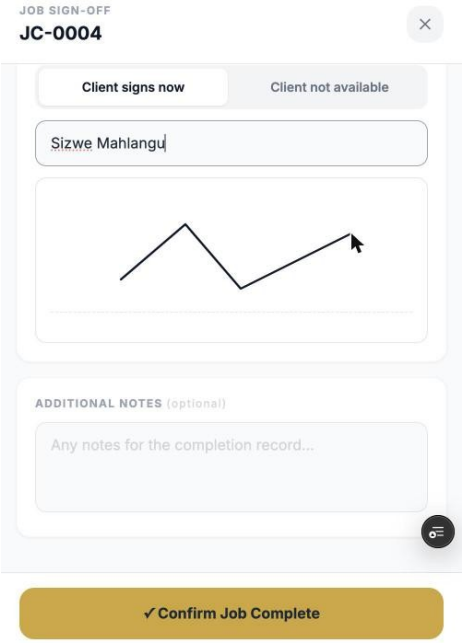
The technician's job list



The service card: checklist to fill in and the next service date



Filling in the Generator Service Checklist



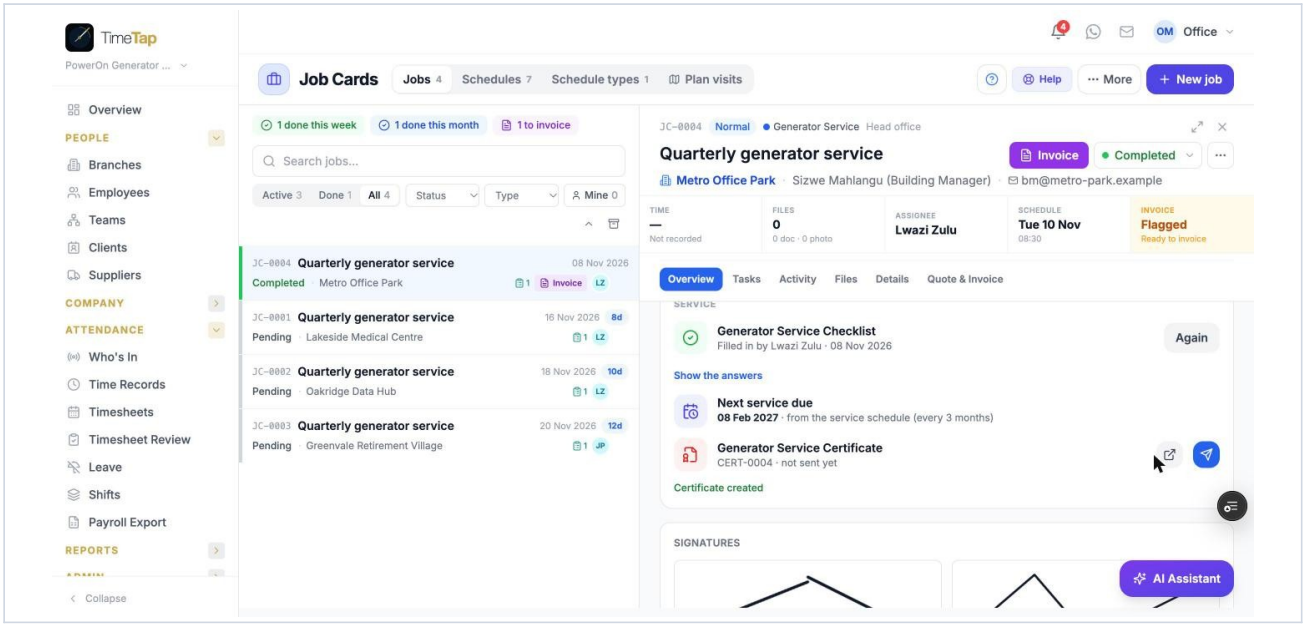
Sign-off: technician and client sign on the phone

6. The certificate is created and sent

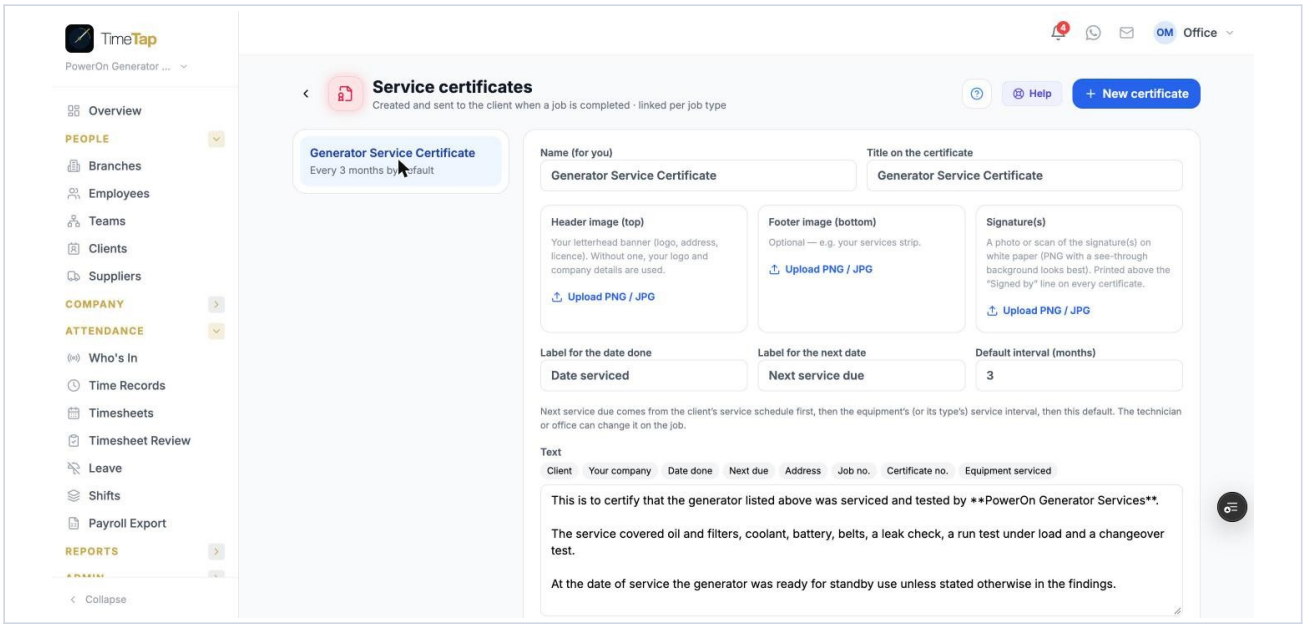
Where: Job card → Service

On completion TimeTap creates the **Generator Service Certificate** with the date serviced and the **next service due** (from the schedule), and sends it to the client by e-mail and WhatsApp — straight away, or only once the invoice is paid. It stays on the job, on the asset and in the client's history.

- Set the certificate up once under **Job Cards → Certificates**: your letterhead, footer and a **signature** image (a PNG with a see-through background looks best).
- Want to be paid first? Set **When does the client get it?** to *Once the job's invoice is paid* — the certificate is created on completion but only goes to the client when the invoice is paid.



The completed job: checklist, next service date and the certificate

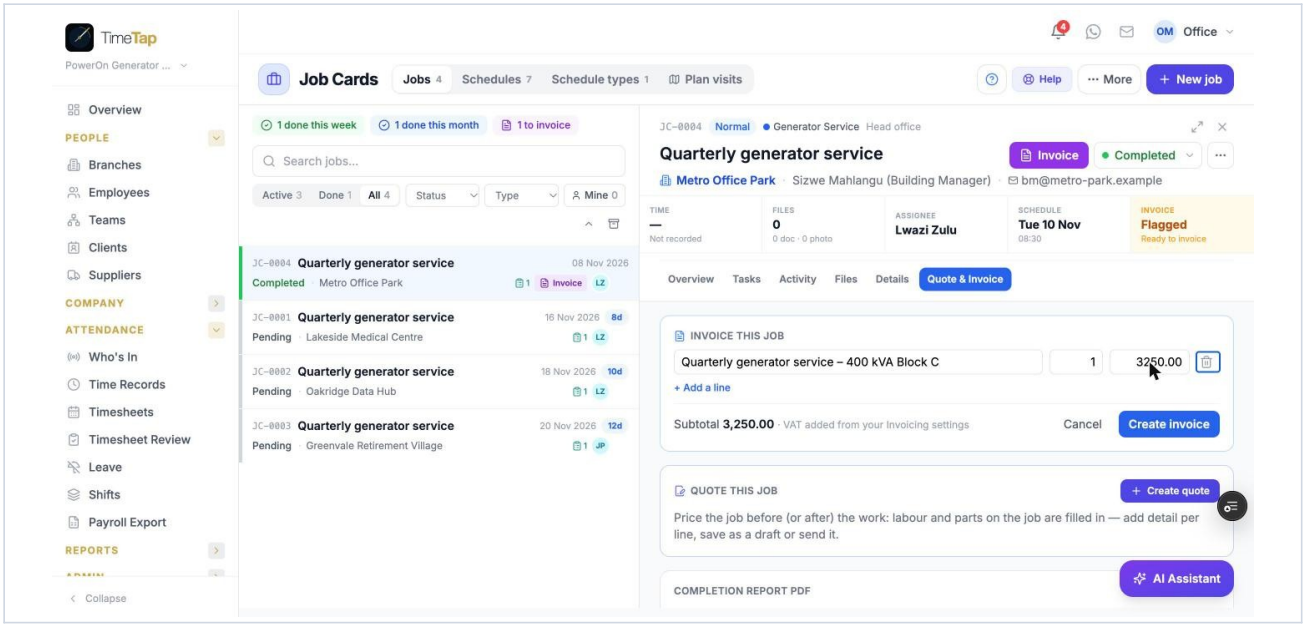


Job Cards → Certificates: letterhead, footer and signature

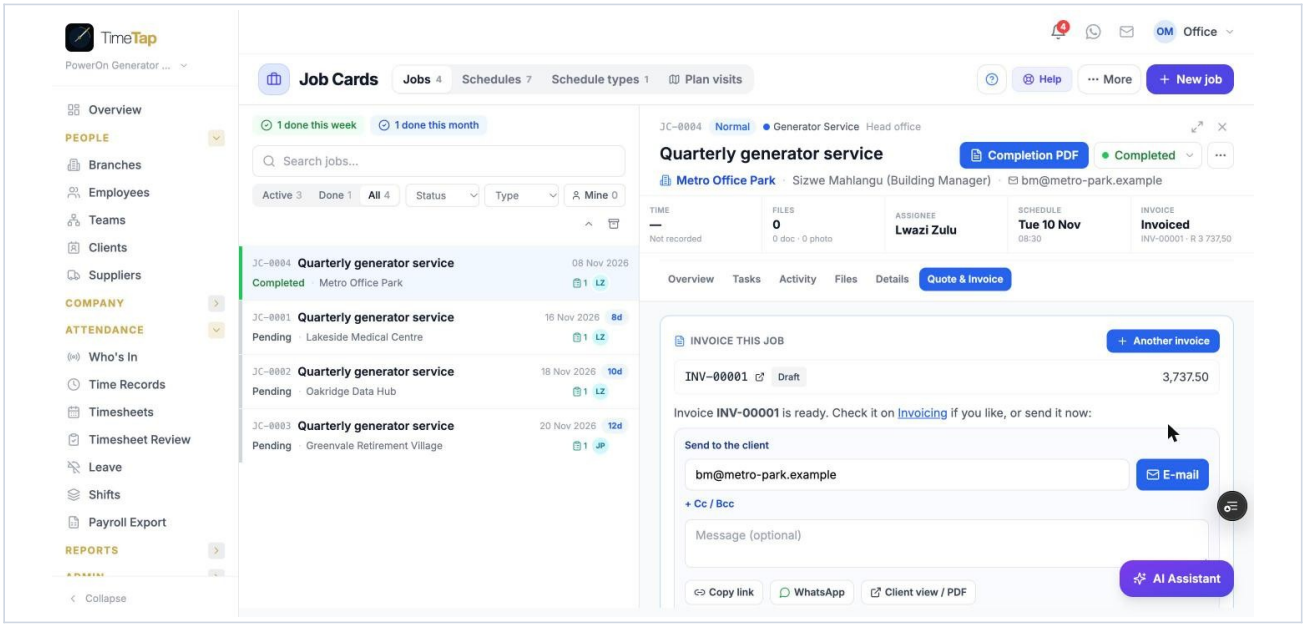
7. Invoice the job

Where: Job card → Quote & Invoice

With the Invoicing & Quotes add-on, invoice straight from the completed job: TimeTap lists the labour, parts and costs marked to charge the client — add or change lines (e.g. *Quarterly generator service – 400 kVA Block C*), tap **Create invoice**, then send it by e-mail or WhatsApp. The job shows as **Invoiced**, so it can't be billed twice.



Invoice this job — check the lines and create the invoice

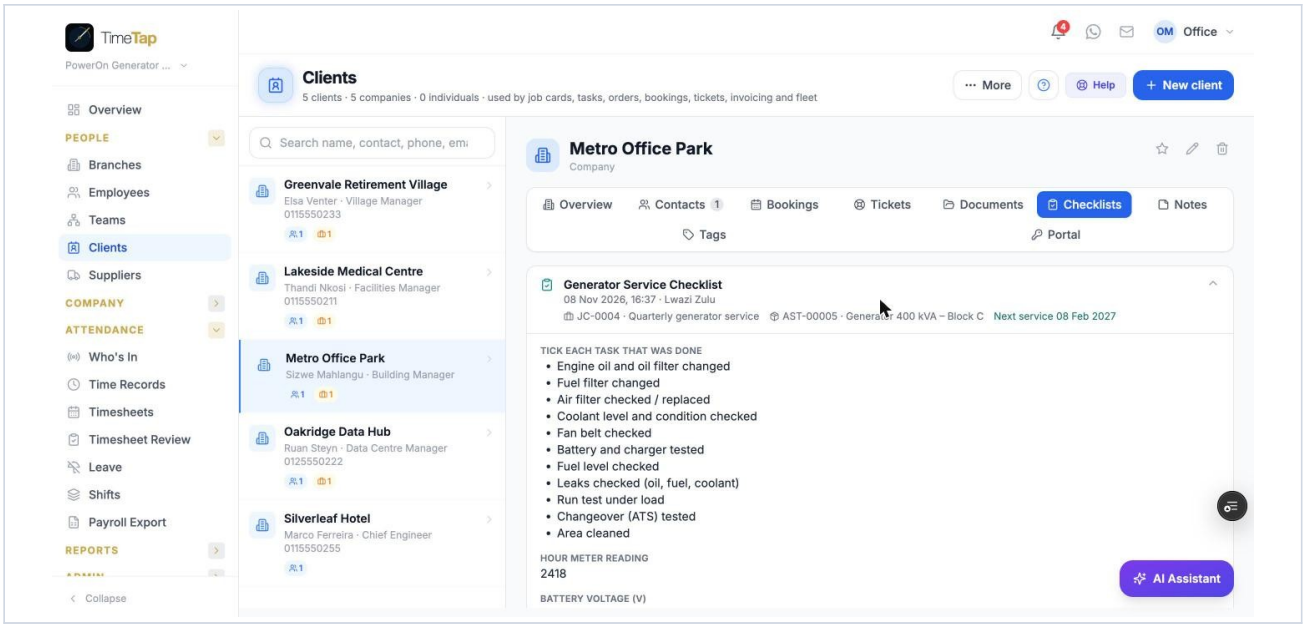


The invoice is ready to send to the client

8. Every visit in the client's history

> **Where:** Clients → the client → Checklists

Every checklist done at a client is kept under **Checklists** — the answers, photos, the job, the certificate and the next service date. Ideal for audits, insurers and contract renewals.



Clients → Checklists: the full service history with every answer

Questions

Can we service some generators monthly and others quarterly?

Yes. Each generator is enrolled in a schedule type — monthly, every 2, 3 or 6 months, or yearly — with its own next due date.

Do technicians record hour meter readings?

Yes. The service checklist has number fields for the hour meter and battery voltage, plus photos — so every visit's readings are kept and comparable.

What if the client wants another day?

The client answers the WhatsApp confirmation with 'another day'. The job card shows it, you pick a new day and ask again — then commit the job.

How does the client get the service certificate?

When the job is completed, TimeTap creates the certificate with your letterhead and signature, the date serviced and the next service date, and sends it by e-mail and WhatsApp. If you prefer to be paid first, the certificate can wait until the job's invoice is paid.

Can we invoice from the job?

Yes, with the Invoicing & Quotes add-on. The invoice is created from the job's lines, sent from the job card and linked to it so it can't be billed twice.

Want this set up for your company? Start a free trial at **www.timetap.co.za** or ask us for a walk-through.