Run transformer maintenance from schedule to invoice

Transformer maintenance · How it works in TimeTap · November 2026

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

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

At a glance

Step	What happens	Who	Where
1	Add the transformer 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. *Annual transformer service* (yearly, 14 days notice).
- ☐ **Job type** with the *Transformer Inspection Checklist* and the *Transformer 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

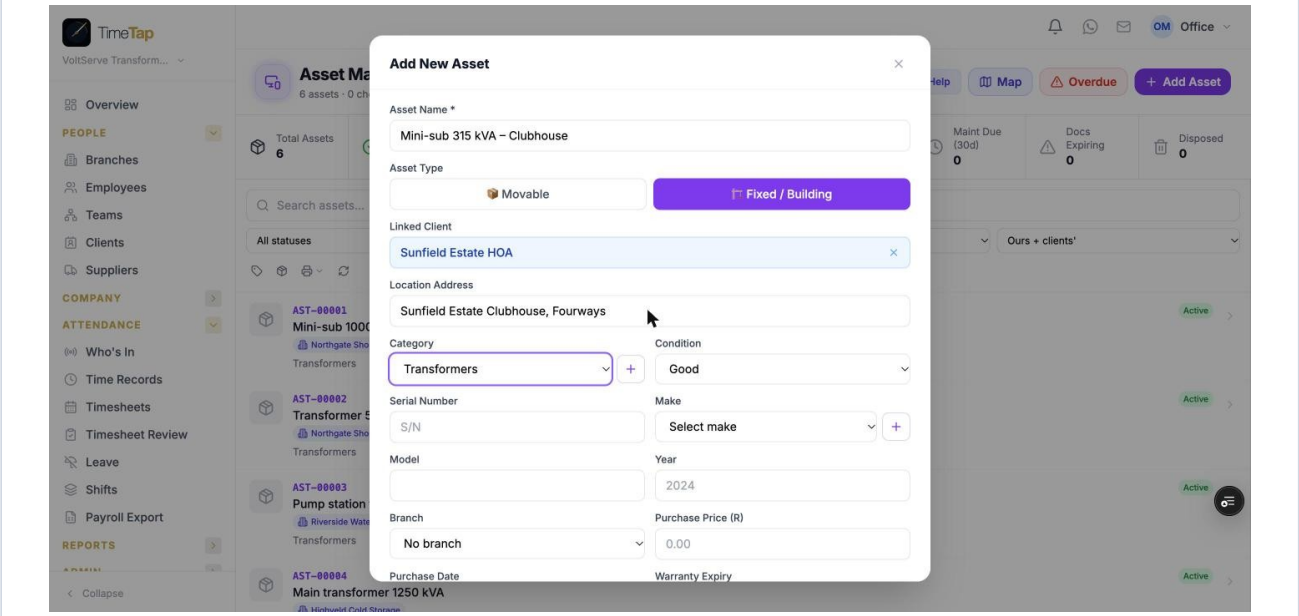
Visual check for oil leaks · Oil level · Silica gel breather · Bushings · Earthing · Temperature gauges · Buchholz relay · Tap changer position · Top oil temperature (°C) · Insulation resistance (MΩ) · Oil sample taken · Photos of nameplate and gauges · Defects found · Result: safe to operate / follow-up

1. Add the transformer and link it to the client

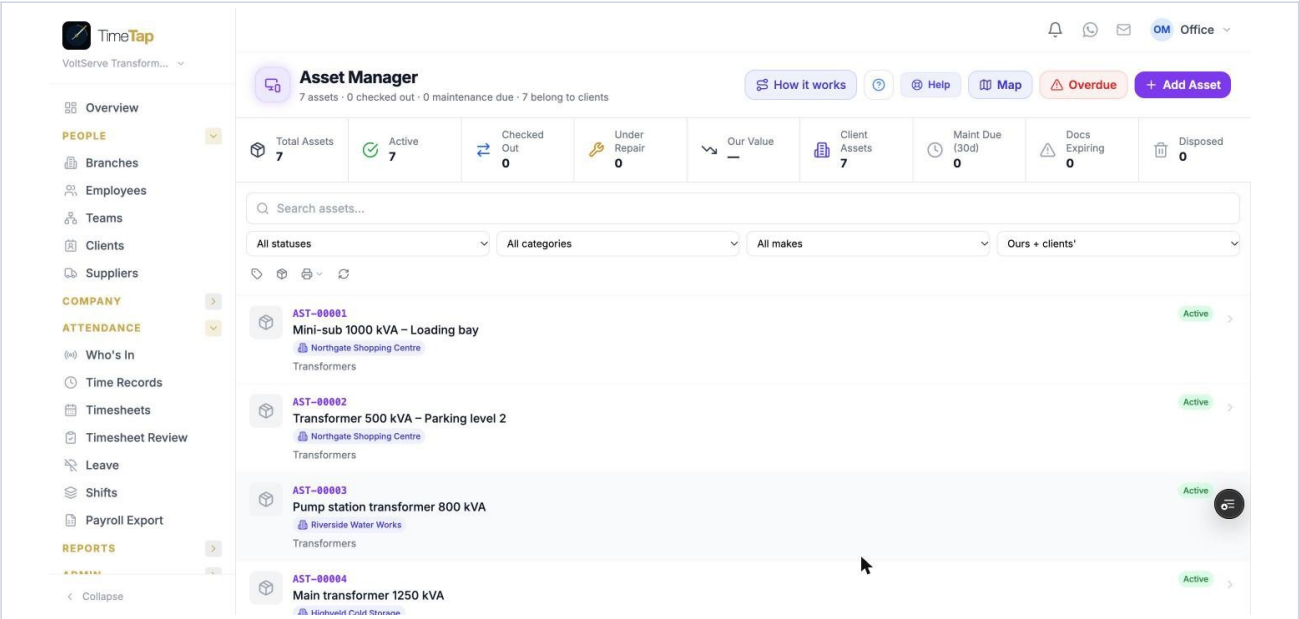
Where: Assets → Add Asset

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



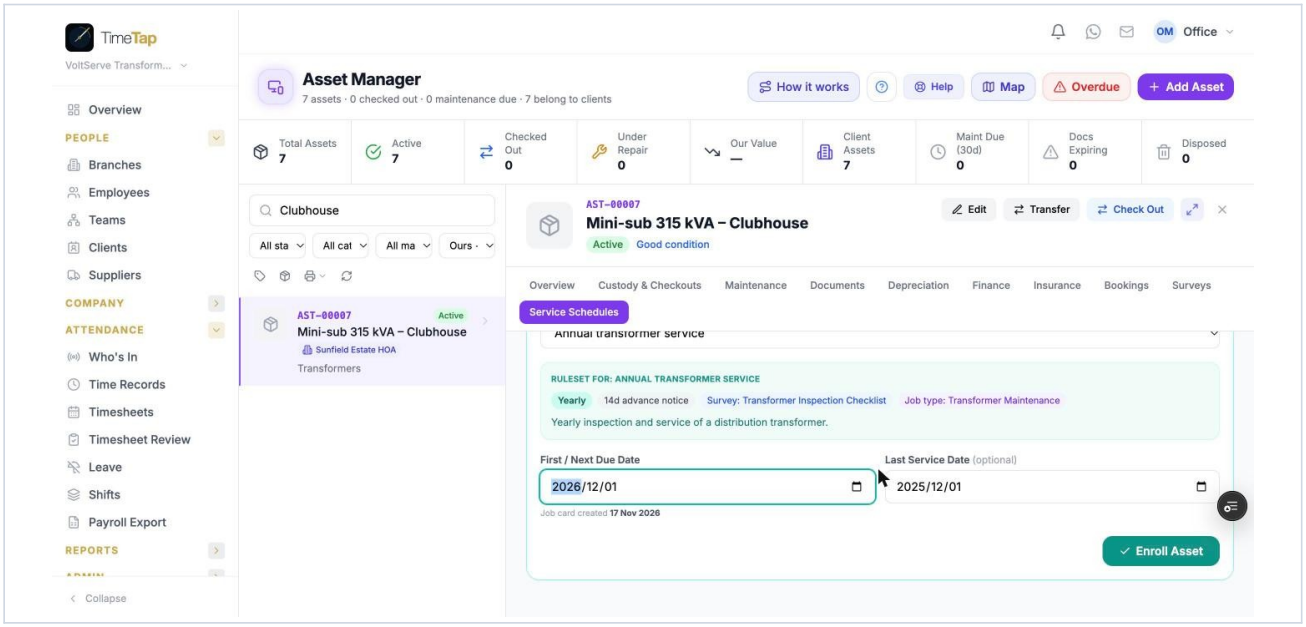
The asset register: every unit, its client and its status

2. Put the asset on a service schedule

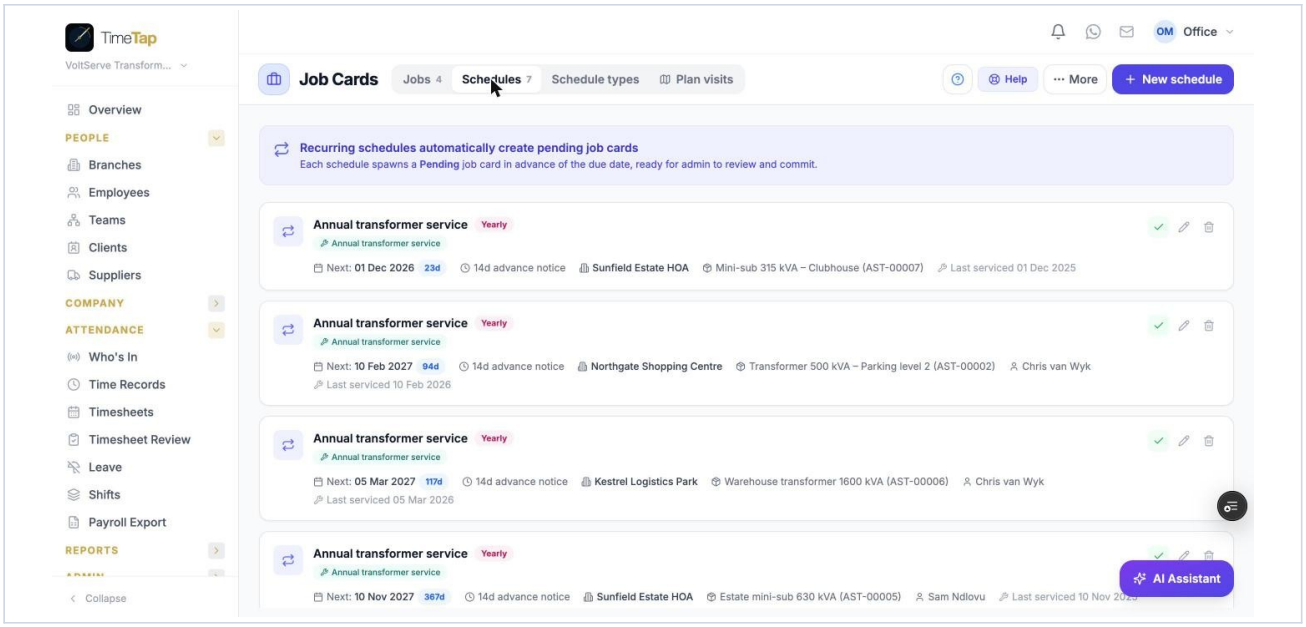
Where: Asset → Service Schedules → Enroll in Schedule

A schedule is what makes TimeTap create the job cards for you. Pick the schedule type (for example *Annual transformer 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 annual transformer service schedule — the ruleset shows what it brings



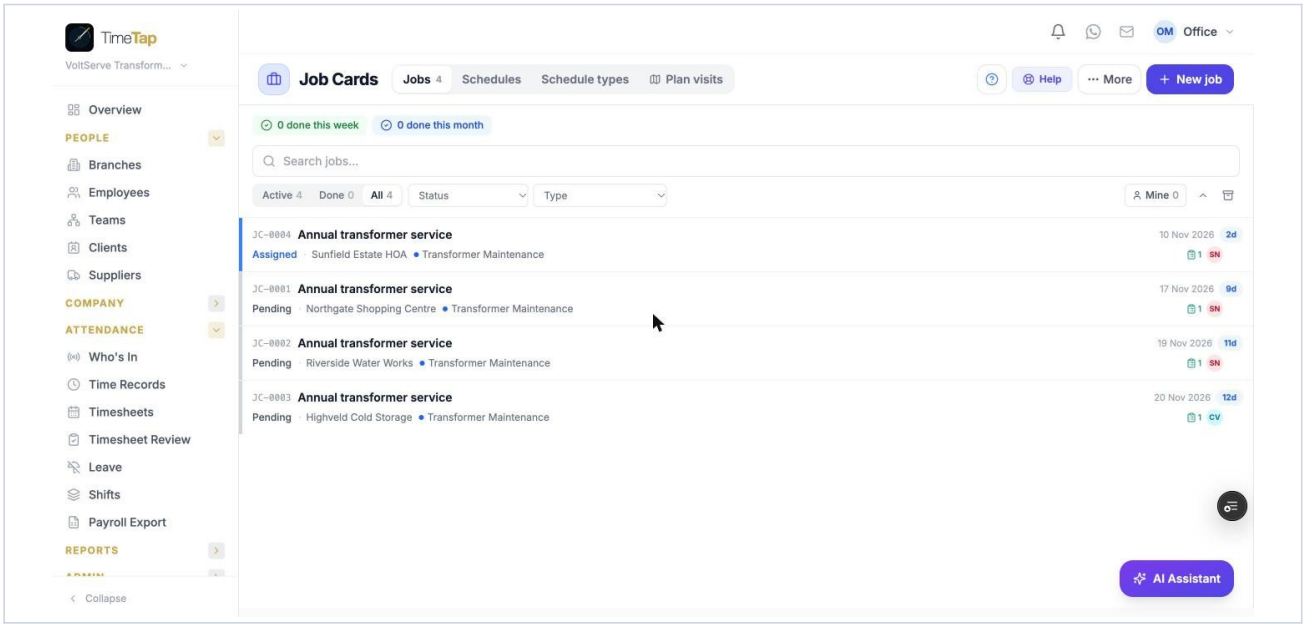
Job Cards → Schedules: every asset on a schedule, with its next due date

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.



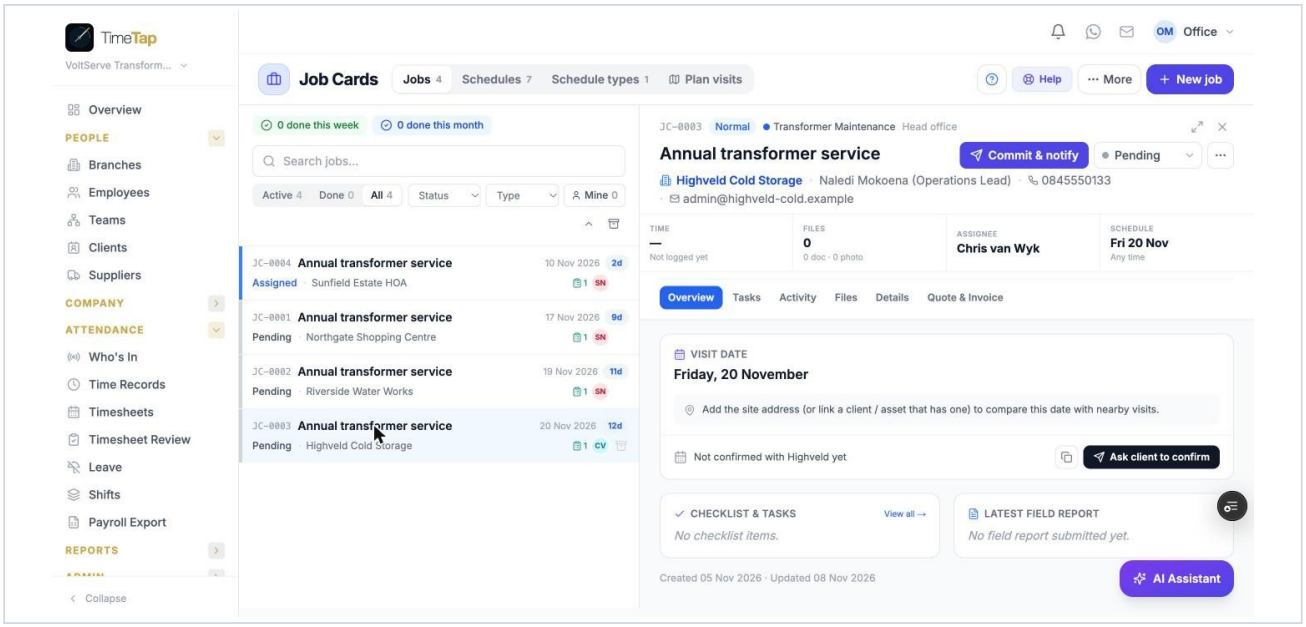
Pending job cards waiting for the office

4. Confirm the date with the client, then commit

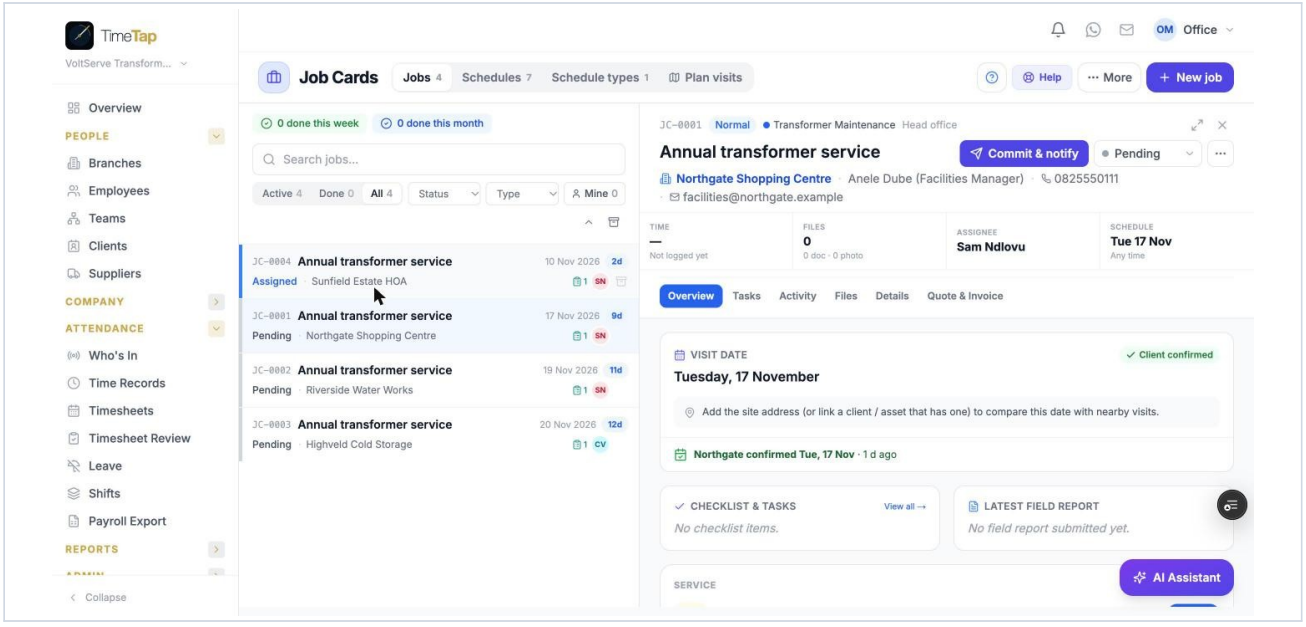
Where: Job card → Visit date

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

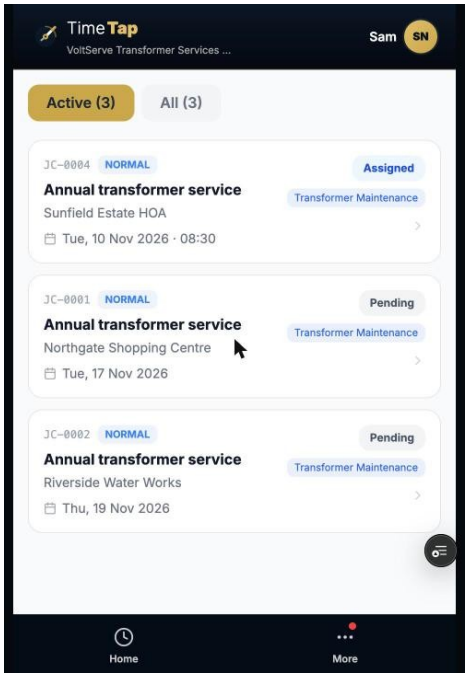
5. The technician does the service on the staff app

> **Where:** Staff app → Jobs

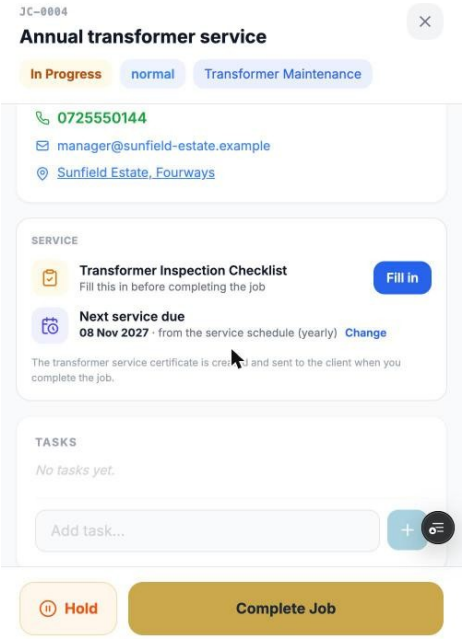
The technician opens the job on their phone, taps **Start Job** on site (the location is recorded) and fills in the **Transformer Inspection Checklist**. The job cannot be completed until the checklist is filled in.

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).

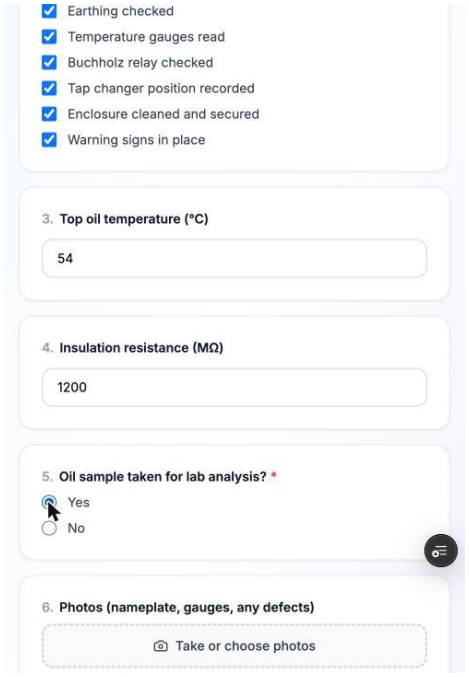
- Readings such as top oil temperature and insulation resistance are captured as numbers, so they can be compared visit after visit.



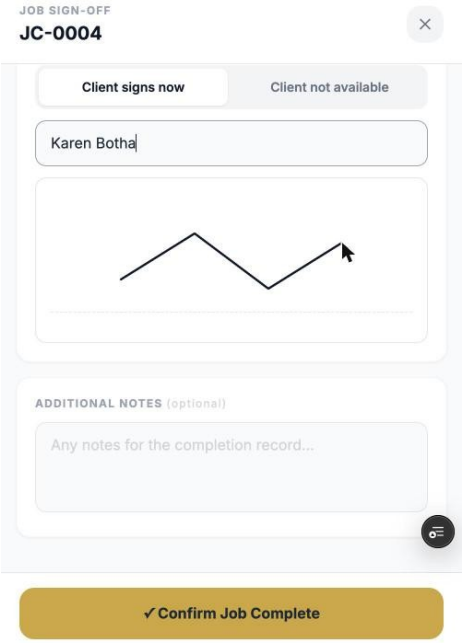
The technician's job list



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



Filling in the Transformer Inspection Checklist



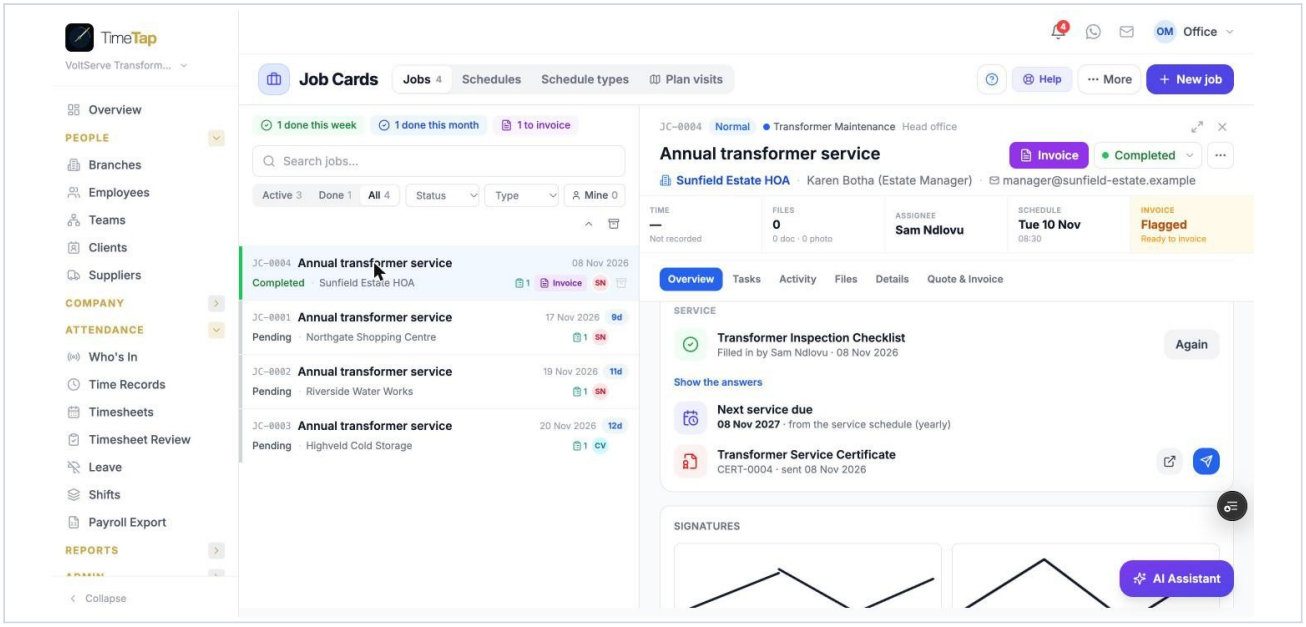
Sign-off: technician and client sign on the phone

6. The certificate is created and sent

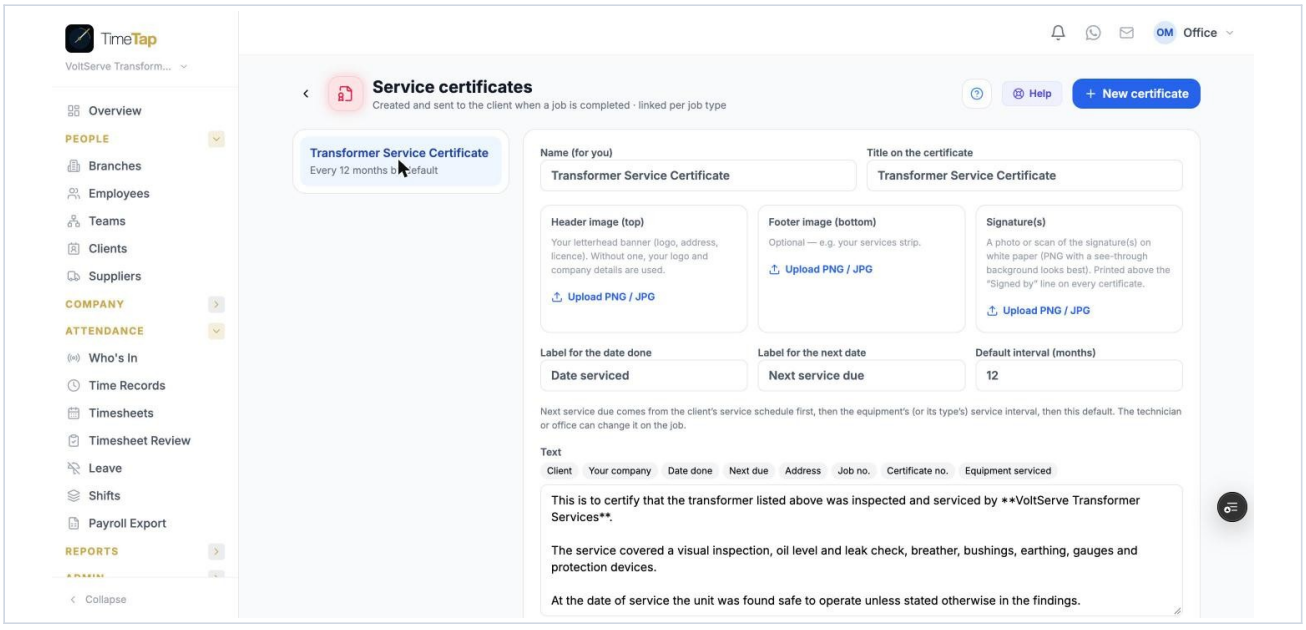
Where: Job card → Service

On completion TimeTap creates the **Transformer 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

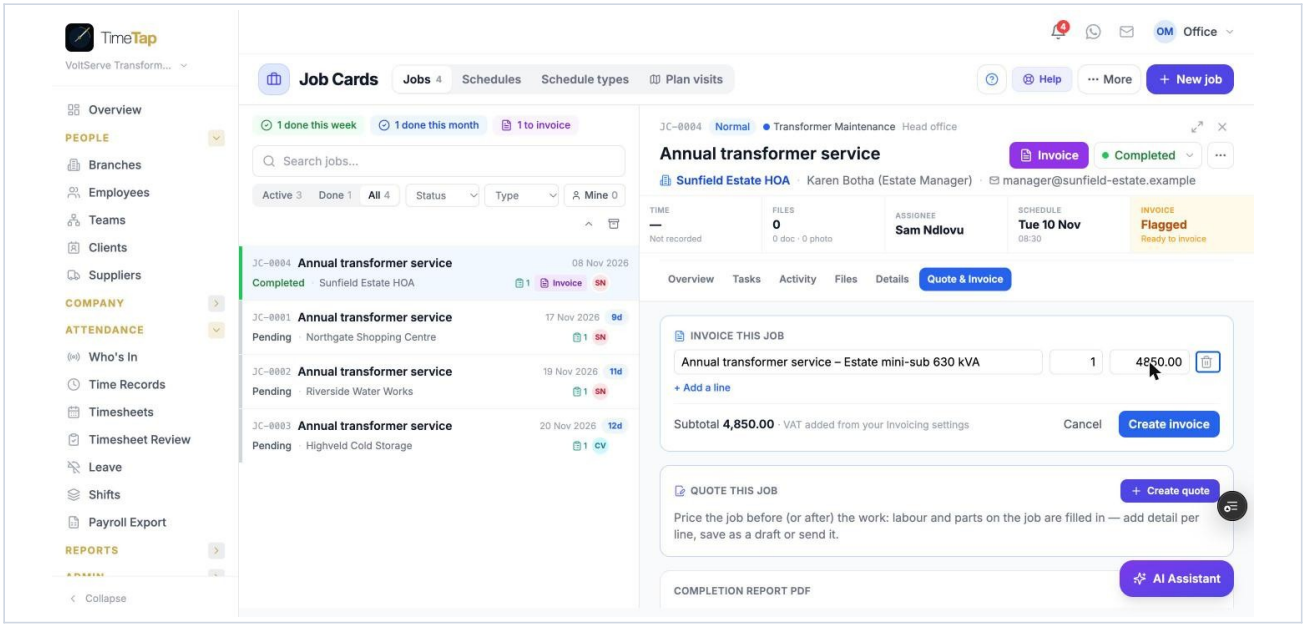


Job Cards → Certificates: letterhead, footer and signature

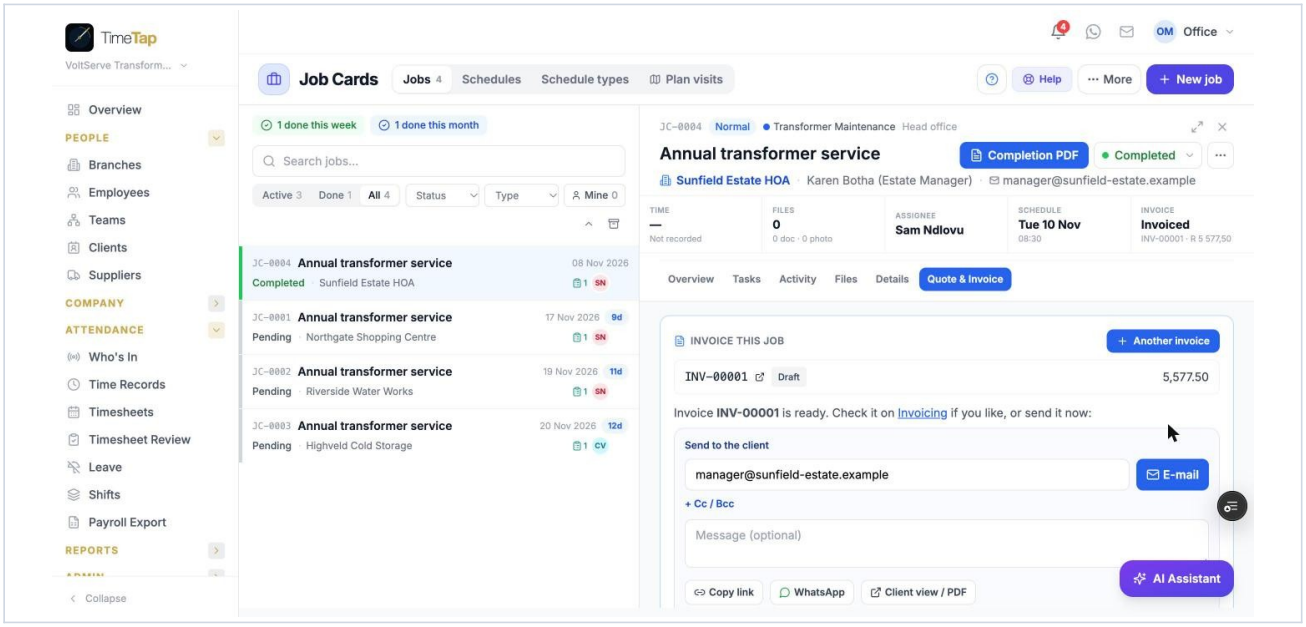
7. Invoice the job

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. *Annual transformer service – Estate mini-sub 630 kVA*), 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

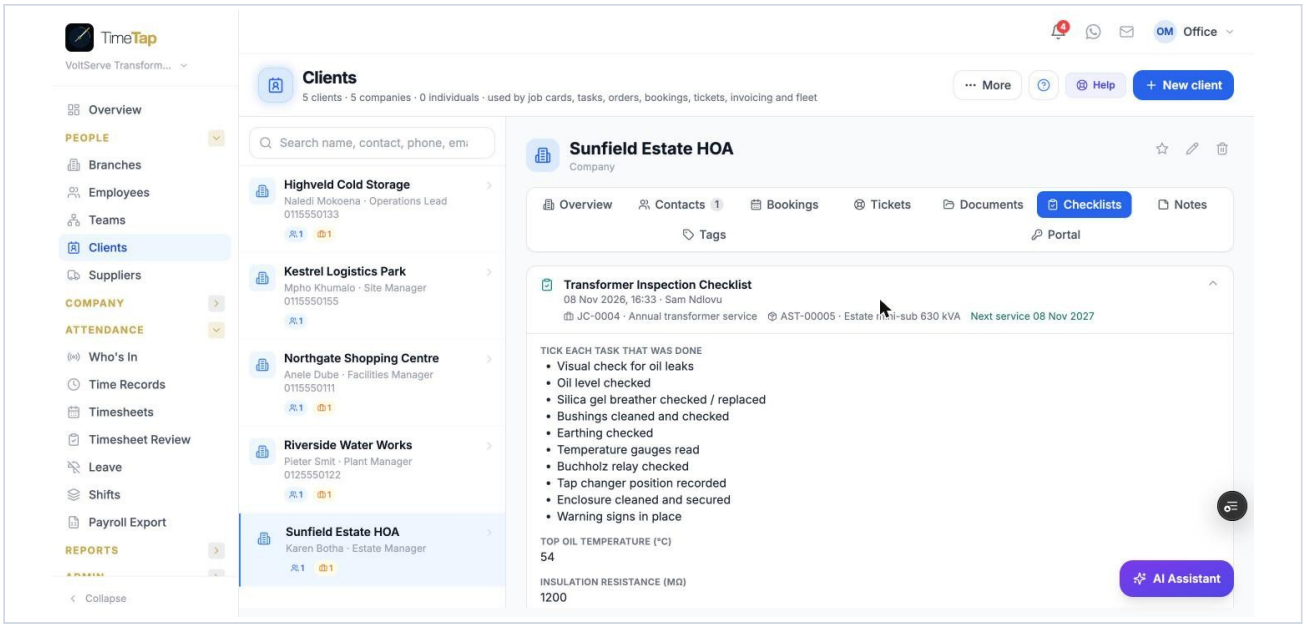


The invoice is ready to send to the client

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 each transformer have its own service interval?

Yes. Every asset is enrolled in a schedule type (for example yearly), and you can set its own next due and last service date. Different sites and units can run on different schedules.

Do technicians need a laptop on site?

No. Technicians use the TimeTap staff app on their phone: open the job, start it on site, fill in the inspection checklist with photos and readings, and get the client's signature.

Can we change the inspection checklist?

Yes. The checklist is a form you edit yourself — add, remove or reorder items, readings, photos and yes/no questions. Every job uses the latest version.

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 due date, and sends it by e-mail and WhatsApp. It also stays in the client's history. 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.