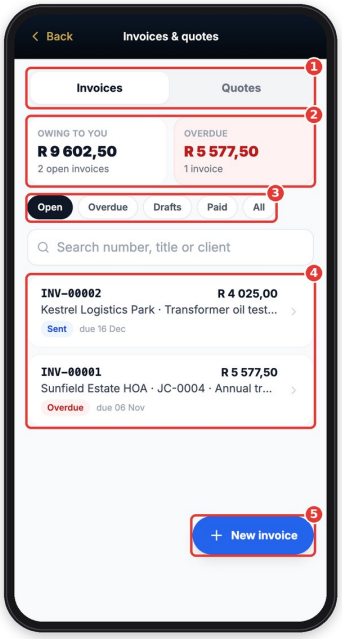
See what is owing, make an invoice or a quote on the spot, send it by e-mail or WhatsApp and record the payment — from your phone.

1. What is owing

1. Open **More → Invoices & quotes**. You see it if your company has Invoicing & Quotes and you are an owner, admin or manager — or your access allows invoicing.
2. At the top: **Owing to you** (all open invoices) and **Overdue** (past their due date). Tap either to see those invoices.
3. Use **Open · Overdue · Drafts · Paid · All** and the search box (number, title or client) to find an invoice. Tap one to open it.

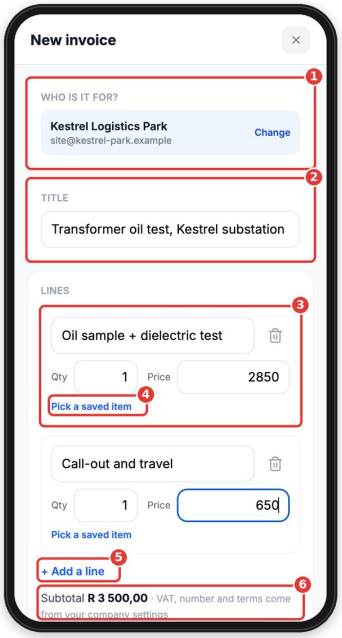


Invoices

1. Invoices or quotes.
2. What is owing, and what is overdue.
3. Filter the list.
4. Your invoices with their status and due date.
5. Make a new one.

2. Make an invoice or a quote

1. Tap **New invoice** (or **New quote** on the Quotes tab).
2. Under **Who is it for?** search your clients and tap one — or type a name if it is not a saved client.
3. Give it a title, then add the lines: what for, quantity and price. **Pick a saved item** fills in one of your saved products or services. **+ Add a line** for more.
4. Tap **Create invoice — then send it**. The number, VAT and terms come from your company settings.



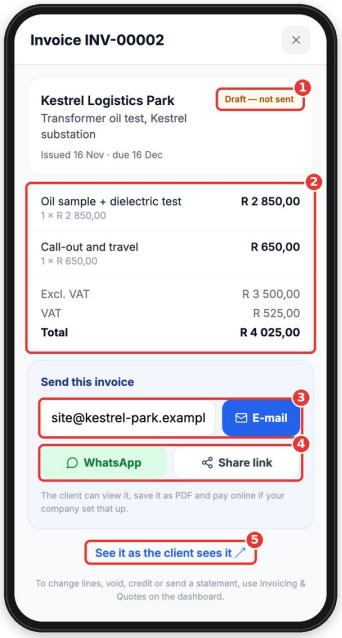
New invoice

1. Pick the client.
2. A short title.
3. A line: what for, quantity and price.
4. Or pick one of your saved items.
5. Add more lines.
6. Subtotal — VAT is added from your settings.

Tip: Finished a job? Open the job — a finished job has an **Invoice** card that fills in the labour, parts and costs from the job for you.

3. Send it

1. A new invoice shows **Draft — not sent** with its lines and total.
2. Under **Send this invoice**: check the e-mail address and tap **E-mail**, tap **WhatsApp** to send the link from your own WhatsApp (when the client has a cellphone number), or **Share link** to send it any other way.
3. The client opens the link, sees the invoice, can save it as a PDF — and pay online if your company has set that up. **See it as the client sees it** shows you the same page.

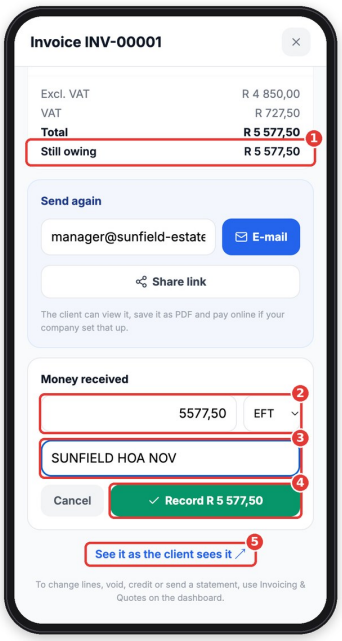


Sending an invoice

1. Not sent yet.
2. The lines and the total with VAT.
3. E-mail it to the client.
4. Or send the link by WhatsApp or any other app.
5. See what the client sees.

4. Money received

1. Open the invoice and tap **Record a payment**.
2. The amount still owing is filled in — change it if they paid part. Choose how they paid (EFT, cash, card…) and add a reference if you like.
3. Tap **Record**. The invoice moves to **Part paid** or **Paid**, and the payment shows on it.

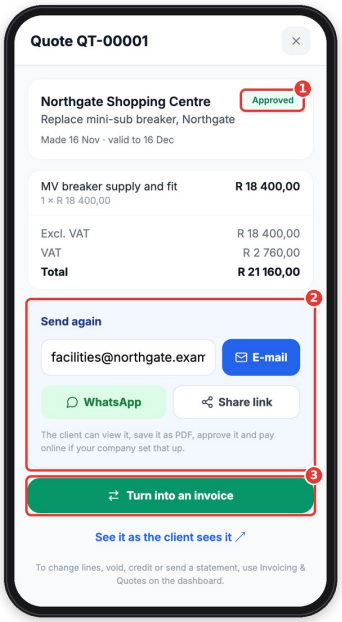


Recording a payment

1. What is still owing.
2. The amount and how they paid.
3. A reference (optional).
4. Record it.
5. See what the client sees.

5. Quotes

1. Make a quote the same way on the **Quotes** tab and send it. The client can approve it from the link.
2. Approved quotes show in a green bar at the top: **… approved quote — ready to turn into an invoice**.
3. Open the approved quote and tap **Turn into an invoice** — the invoice opens, ready to send.



An approved quote

1. The client approved it.
2. Send it again if needed.
3. Make the invoice from it.

> **Tip:** To change lines on an invoice that was already sent, void it, give a credit or send a statement, use **Invoicing & Quotes** on the dashboard.

Still stuck? Ask your team leader or HR — they can see what TimeTap shows for you.