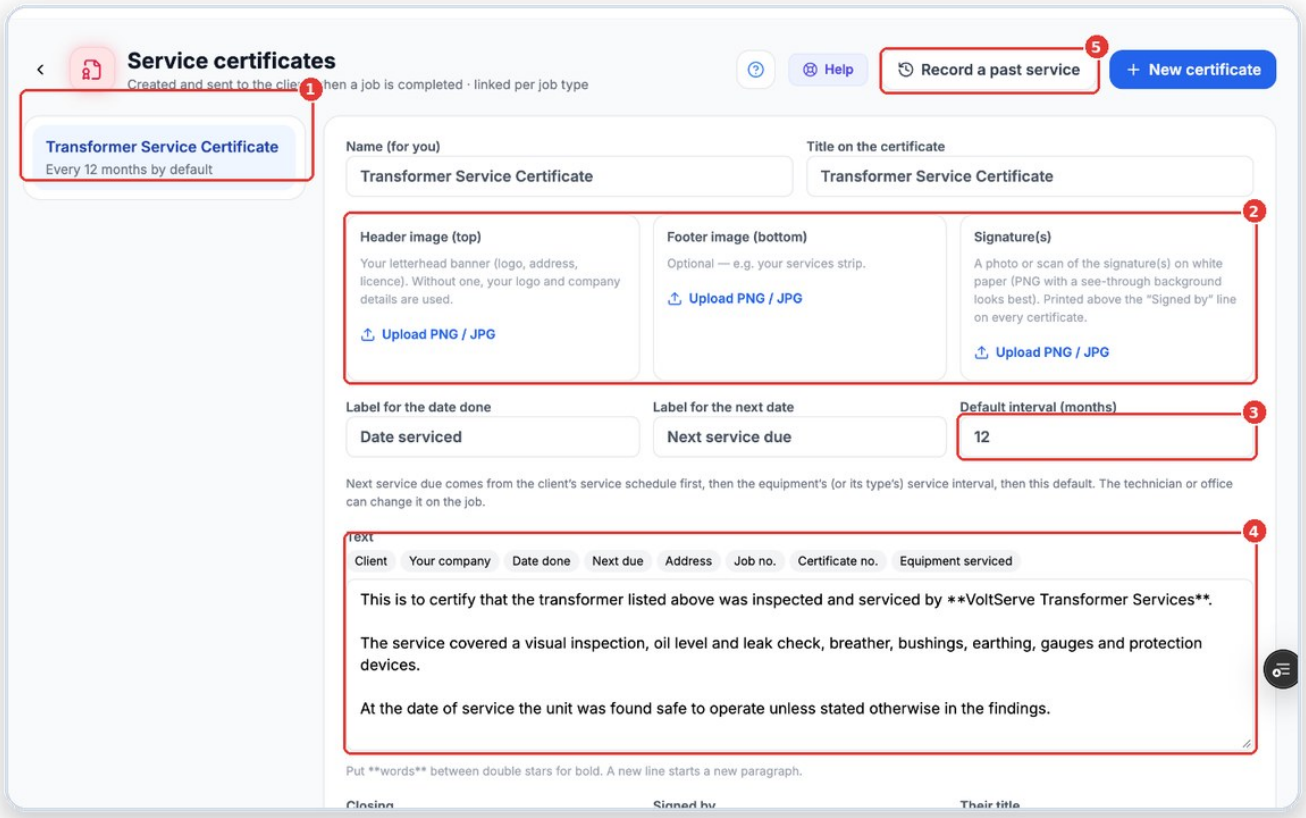
How TimeTap creates and sends a service certificate by itself when a job is completed — and how to get a certificate for a service done before you used TimeTap.

1. How it works

1. You set up a certificate **once** — your header and footer images, the wording, who signs and how often the service is due.
2. You link it to a **job type** (for example an extraction canopy service).
3. From then on, every job of that type gets its certificate **automatically** the moment the technician completes it — on the phone or on the dashboard. Nobody has to create or send anything.



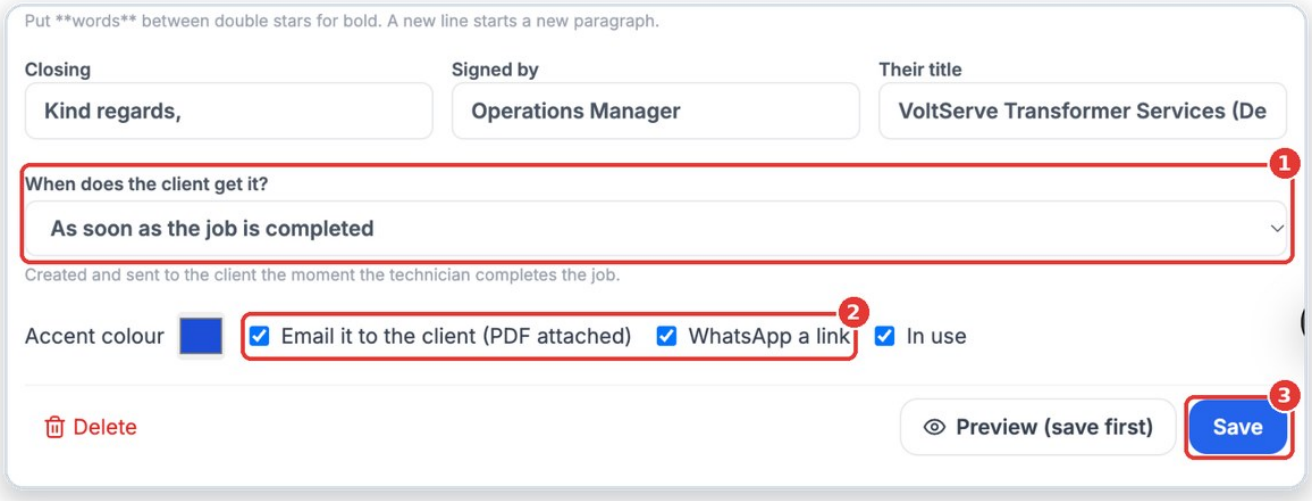
Job Cards → More → Service certificates

1. Your certificate. Click it to edit.
2. Header, footer and signature images (PNG or JPG).
3. How often the service is due by default — used when there is no service schedule or equipment interval.
4. The wording. Click a field like **Client** or **Next due** to insert it.
5. **Record a past service** — for work done before TimeTap (see section 4).

> **Tip:** Only jobs whose **job type** has a certificate get one. Check it under **Job Cards → More → Job types, forms & checklists** → edit the type → *Certificate sent to the client*.

2. Option 1 — automatic: when and how the client gets it

1. Scroll down on the certificate to **When does the client get it?**
2. **As soon as the job is completed** — sent the moment the technician completes the job. **Once the job's invoice is paid** — held until the invoice is paid, then sent by itself. **Only when we send it from the job** — created, but the office presses Send.
3. Tick **Email it to the client** (PDF attached) and/or **WhatsApp a link**, then **Save**.



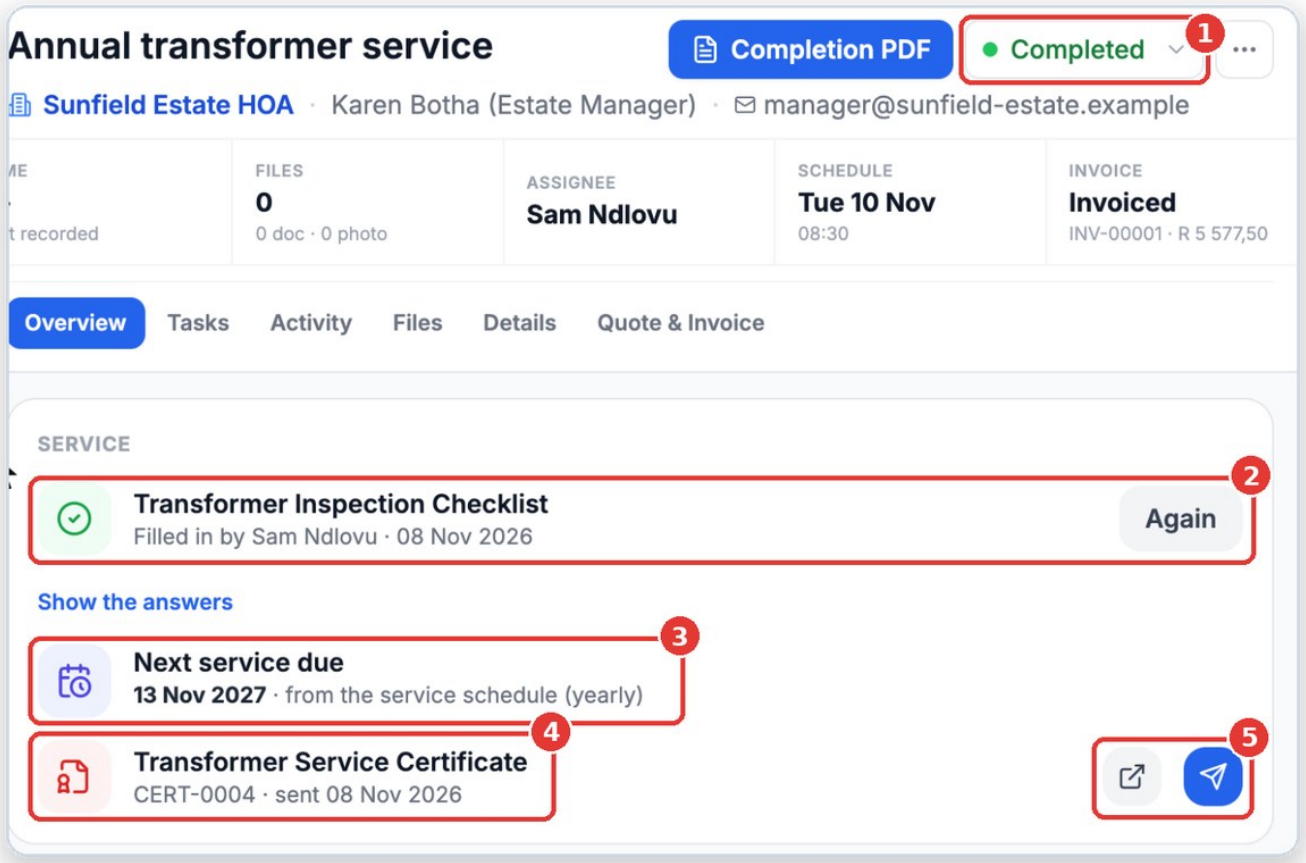
Sending options

1. When the client gets it.
2. How it is sent: email with the PDF, and/or a WhatsApp link.
3. Save your changes.

> **Tip:** If the technician's phone loses signal right after completing, TimeTap creates and sends the certificate itself within about half an hour.

3. Find a certificate, or send it again

1. Open **Job Cards** and click the completed job.
2. On the **Overview** tab, the **Service** card shows the checklist, the next service date and the certificate.
3. Click the **open** icon to view or download the PDF, or the blue **send** button to send it to the client again.
4. Clients with a portal login can also see their certificates in the client portal.



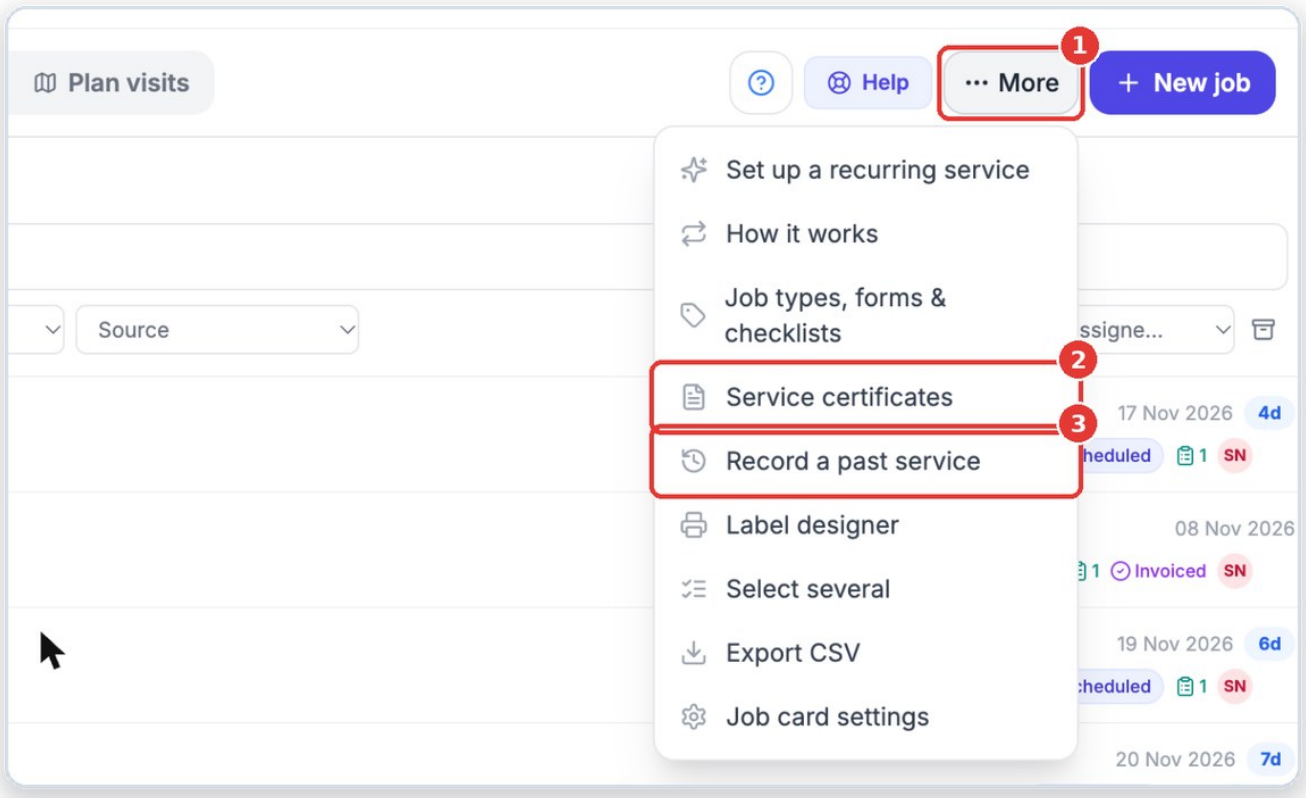
A completed job card

1. The job is **Completed** — that is what creates the certificate.
2. The checklist the technician filled in.
3. Next service due — worked out for you.
4. The certificate number and when it was sent.
5. View the PDF, or send it again.

Important: No certificate sent? Check that the client on the job has an **email address** or **WhatsApp number**, and that the job type has a certificate. You can always press **send** on the job after fixing it.

4. Option 2 — manual: a service done before TimeTap

1. Go to **Job Cards → More → Record a past service** (also on the **Service certificates** page, and as **Past service** in a client's Job Cards section).
2. Do **not** create and complete a normal job for an old service — that would date the certificate today and send it to the client straight away.

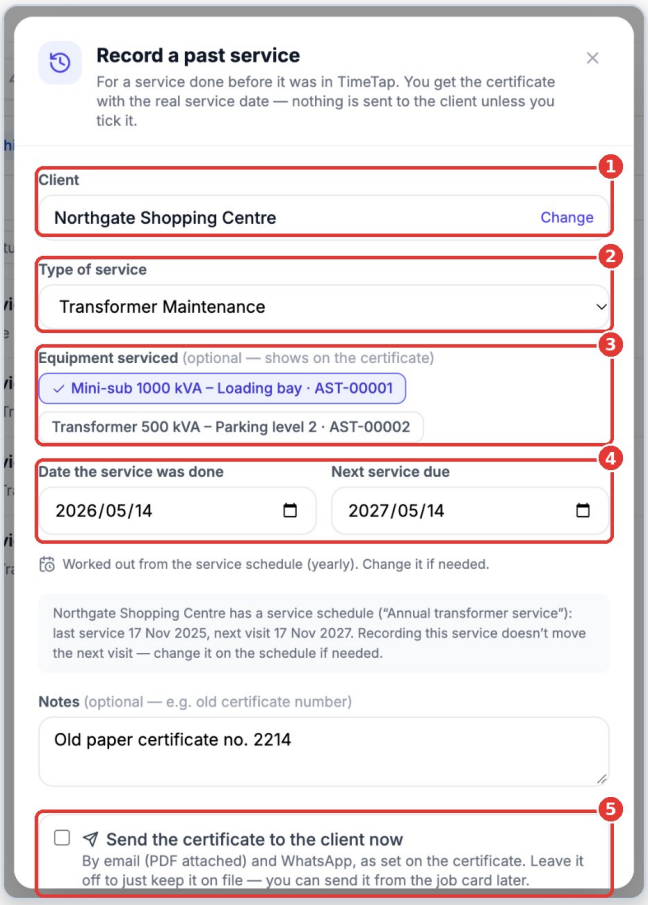


Job Cards → More

1. **More** at the top of Job Cards.
2. Service certificates — the wording and look.
3. **Record a past service**.

5. Fill in the past service

1. Search for and pick the **client**.
2. Choose the **type of service** — only job types that issue a certificate are listed.
3. Optionally tick the **equipment** serviced — it is printed on the certificate.
4. Enter the **date the service was done**. **Next service due** is worked out for you (from the client's schedule, the equipment's interval or the certificate's default) — change it if needed.
5. Add a note if you like (e.g. the old paper certificate number). Leave **Send the certificate to the client now** off to just keep it on file, or tick it to send it now.
6. Click **Save & create certificate**.



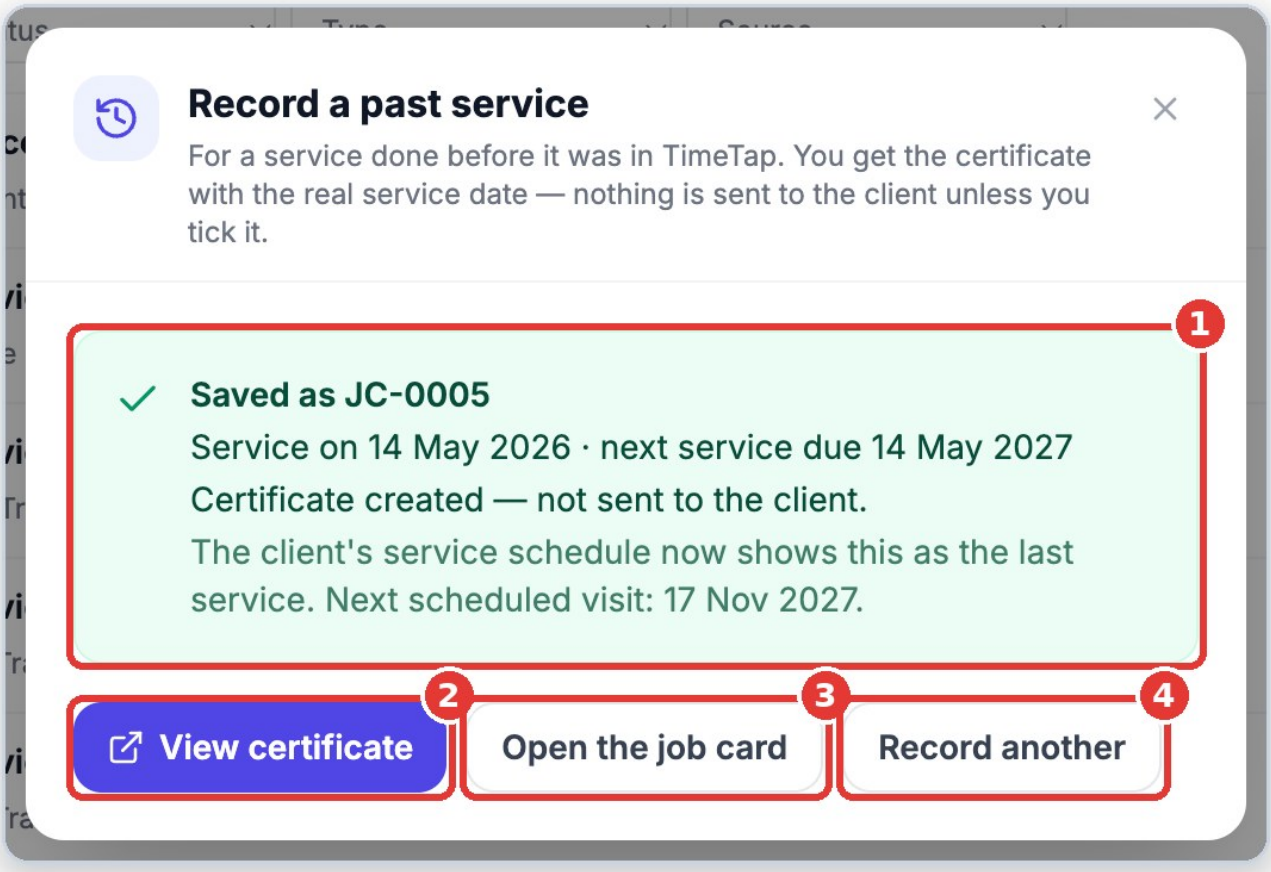
Record a past service

1. The client.
2. The type of service.
3. Equipment serviced (optional).
4. The real service date and the next service due.
5. Send now? Off by default — nothing goes to the client unless you tick it.

> **Tip:** If the client has a service schedule, TimeTap shows it here. The schedule only takes this as its **last service** if it is newer than the one it already knows, and the schedule's **next visit is never moved** — change that on the schedule if needed.

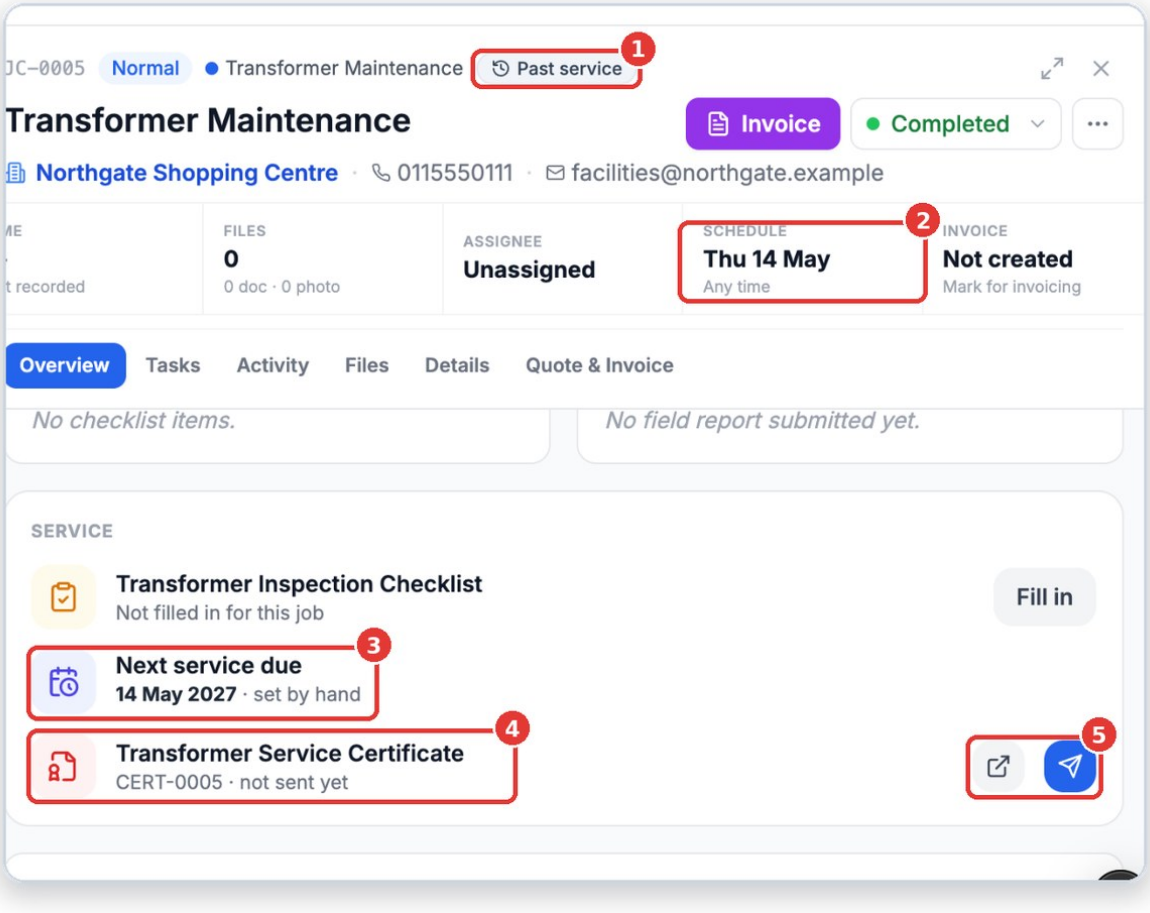
6. Done — view, open or record another

1. TimeTap confirms the job card number, the dates and whether anything was sent.
2. Click **View certificate** to check the PDF, **Open the job card** to see it, or **Record another** — it keeps the client and service type, so entering several old services is quick.
3. The job card is marked **Past service** and dated on the real service day. You can send the certificate from it any time.



Saved

1. What was saved: service date, next service due, and whether the client was sent anything.
2. View the certificate PDF.
3. Open the job card.
4. Record another past service.



The past-service job card

1. **Past service** badge — recorded after the fact.
2. Dated on the real service day.
3. Next service due on the certificate.
4. The certificate — **not sent yet**.
5. View it, or send it to the client when you are ready.

Still stuck? Use the feedback button in the TimeTap side menu, or ask us — we’re happy to help.