USER MANUAL

WorkFiled

From quote to job completion

For tradespeople and small businesses that want to keep quotes, job reports, sign-offs and invoices together.

iPhone · iPad · Mac

Android phone and tablet · Web app

Updated 25 November 2026

This edition reuses the established workflows and adds current features, Android and the web. Screenshots and the main video show the Apple edition with fictional data.

View platforms, downloads and the latest guide

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Navigation may differ between platforms. Check the app page for the availability of each edition.

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Choose a device and get started

iPhone, iPad, Mac, Android phones, Android tablets and browsers have different first-start steps. The chapters below explain the shared workflows.

1. Get WorkFiled from the official store for your device. See platforms and download status on the app page. App Store and Google Play show when an edition is available in your country.
2. On **iPhone, iPad and Mac**, you can start a personal workspace without a company account. Choose sample data first if you would like to practise.
3. On **Android phones and tablets**, create or sign in to a company account. The account also verifies purchases and trial access when you choose to keep your work on the device.
4. For the **web app**, use the company's browser access. Start with Web access step by step; no mobile-app installation is needed inside the browser.
5. Switch to your own workspace before entering real customer data. Always check the workspace name and storage status. Navigation and button names may vary between platforms.

About screenshots and the video

The existing screenshots and main video show the Apple edition with fictional data. Use the updated written chapters for new features and Android or browser setup. Update all devices before sharing new types of records. Older editions may reject a newer format.

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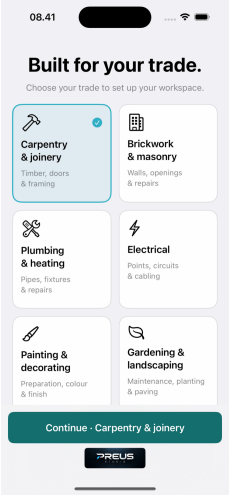
Getting started

Set up your workspace and business details before you share your first document.

1. Tap **Get started**, select your trade, and continue. Your trade guides the fields and resources WorkFiled suggests. You can change it in **Settings**.
2. Use sample data to practise. Switch to your own workspace before entering real customer information.
3. Open **Settings** → **Business details**. Add your trading name, address, contact details and logo. Enter relevant business registration and tax details.
4. Review the currency, selling rate and tax defaults for new work. Check the individual document if you have agreed different terms with a customer.

Workspaces

On Apple devices, you can use a personal workspace without a company account. On Android, the company account verifies app access even when work data stays on the device. Open **Company & employees** when you are ready to share jobs and visits with your team.



Choosing a trade on first launch. Sample data.

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Customers and jobs

Save customer information once and reuse it on quotes, jobs and invoices.

1. Open **Customers** → **New customer**. Enter a name, address and relevant contact details, then save.
2. Open the customer and select **New job**. Give the job a title, specify the site and describe the work.
3. If you already have an accepted quote, start the job from the quote to keep the records linked.
4. Find the job in your jobs list. Use a recognisable title, such as “Replace door closer, 8 Lake Lane”.

Example

Use the customer record for the billing address and the job site for the address where the technician needs to arrive.

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Price list, projects and actuals

Reuse business defaults and keep the history of a customer or project together.

1. Create or review price-list entries with a description, unit and selling price. Keep private costs in the internal fields. For CSV import, review the file contents and import result.
2. Use customer projects when several quotes or jobs belong to one case. Verify the customer and site when reusing earlier details.
3. Start the job from an accepted quote to preserve the link. Later, compare the quote with recorded time, resources and actual figures.
4. Assign photos to the before, during or after phase and highlight an area with an arrow, circle or pen. Check the image and its job before sharing.

The workflow on Android

The Android edition also includes price lists and CSV, projects and customer history, quote-to-actual comparison and photo annotation. Navigation can differ from the Apple video.

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Quotes and price acceptance

Agree the price and scope, then record acceptance against the quote the customer reviewed.

1. Open **Quotes** → **New quote**. Select the customer, add a title and describe what the price covers.
2. Add a quantity, unit and selling price for each line. Enter any internal costs in the separate fields for your own records.
3. Save the draft and open **Preview quote PDF**. Check the customer, scope, total and terms. Open **Send to customer** and share the checked PDF.
4. When the customer accepts, select **Record price acceptance**. Save a reference to written confirmation or show the customer the exact quote PDF before capturing a signature on the device.
5. Select **Start job** on the quote and check the site and scope on the new job.

Sharing

Sharing a PDF through the share menu leaves the quote status as it is. Use the built-in Mail or Messages composer if you need the send recorded in the delivery log.

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Declined, expired and archived quotes

Keep the quote list useful while preserving document history.

1. Open a quote awaiting a customer reply. When the customer says no, choose **Mark declined** or the corresponding decline action.
2. Use **Reopen quote** if discussions resume. Check validity, price and scope before sharing a new agreement.
3. An unanswered sent quote shows **Expired** after its validity date. An accepted quote does not expire simply because that date has passed.
4. Choose **Archive** to clear a quote from the active list. Open archived quotes and unarchive the record to work on it again.
5. Check any active online links before recording a local decline. Follow the app’s instructions if an online quote must be closed first.

History remains available

Archiving organises the list. Recorded customer acceptance, previously issued documents and their originals are preserved.

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Recording work, time and materials

Keep a running record on the job so you can review time, quantities and evidence together at handover.

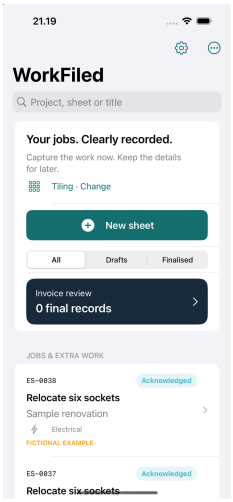
1. Open the job's work section. Use **Add resource, travel or expense** to record labour, materials, equipment, travel or expenses.
2. Write a useful description for each line. Check the quantity and unit, such as 3 metres of cable or 2 brackets.
3. Open the timer from the job overview. Start, pause and stop it as needed. Check the elapsed time and number of people before saving it as a work line.
4. Add photos to the job when they help document the work. Review the entries before preparing the recipient copy.

Example

Give installation time, materials and travel their own lines. It makes a wrong quantity easier to find before handover.

Quick actions on the job

Use **Take photo**, **Record time** and **Dictate work** directly from the job. Review dictated text and quantities before saving. On an empty job, the **Record work** action helps you start. Photos and signatures remain optional where the job does not require them.



Jobs and work in progress. Sample data.

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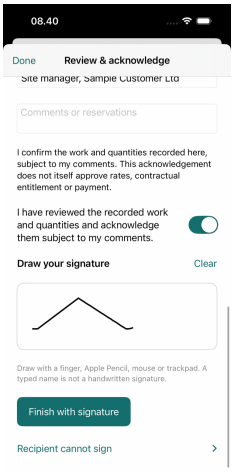
Handover and signature

The customer can acknowledge the work and quantities you show at handover.

1. Open **Status & review** on the job and open the recipient copy. Review the scope and work lines. Internal rates and notes stay in the workspace.
2. Ask the customer to enter their name and role, add any reservations, check the acknowledgement and draw their signature.
3. Choose **Finish with signature**. If the customer cannot sign, choose **Recipient cannot sign** and add a reason if known.
4. Open the saved recipient PDF and send it to the customer.

Three separate records

Price acceptance belongs to the quote. Handover acknowledgement belongs to the job report. A payment received is recorded on the invoice.



Recipient acknowledgement and signature. Sample data.

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Issuing and sharing an invoice

Check the invoice before WorkFiled saves the issued original.

1. Open **Settings** → **Business details** → **Bank transfer**. Enter the instructions the customer should use. The invoice number can identify the payment.
2. Create the invoice from accepted or completed work. Check the customer, lines, taxes, due date and payment details.
3. Open the exact invoice preview. Close it, confirm you have checked it, then select **Issue invoice**.
4. Open the invoice in **Finance** and choose **Open original PDF**. Share that document with your customer.

The original

WorkFiled stores the issued PDF. Send that same original if the customer asks for another copy.

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Payments and credit notes

Record a payment once it arrives. Use a separate credit note to correct an issued amount.

1. Verify the bank receipt, open the correct invoice and choose **Mark paid today**. Check the date and invoice before confirming.
2. Choose **Clear paid marker** if you selected the wrong invoice. This changes the recorded invoice status and keeps its original PDF.
3. Choose **Create credit note** to correct an issued amount. Select a full or partial credit and enter a reason.
4. Check the credit note PDF before issuing. A partial credit leaves a remaining balance. Find the invoice and credit note as separate documents.

Example

If you need to credit a bracket you already invoiced, use a partial credit note and check the remaining balance before sharing the documents.

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Prepare accounting and document collections

Check information before passing it to your bookkeeper or accounting system.

1. Create an invoice draft from accepted or completed work. For service visits, review the selected invoiceable visits and duplicate protection before issuing.
2. Choose a combined PDF for review or printing. On Android, the collection is a print copy. Choose **ZIP with original PDFs** when you need the exact issued original files.
3. For the optional **e-conomic connection**, the owner connects the business's own account. Check customer matching, invoice lines and amounts before transferring a draft.
4. Open the accounting system and check the draft there. Post and send it from that system. A transferred draft is not a posted invoice by itself.

Keep the original

A combined print copy does not change the issued invoice or job report. Use the original PDF or original ZIP for document archiving and resending.

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Company, roles and team calendar

Use the company workspace for the jobs and visits your employees need to see.

1. Open **Settings** → **Company & employees**. Create a company as the owner or sign in to your existing company.
2. Choose **Invite employee**, enter their work email, and select Employee or Project manager. Share the invitation privately. The code works for that email for seven days.
3. Open the person's profile after they join. Verify their role and access before sharing work.
4. Publish the appropriate saved job or choose **Share a planned visit** in **Team calendar**. Check its date, time, address and scope. Open the visit and assign the person who will do the work.
5. The employee signs in to the company and opens the visit in **Team calendar**. Use Day or Week to find it.

Who can see what?

The shared calendar shows the schedule and scope. Internal prices and notes stay in the workspace.

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Personal or company workspace

Choose where the work belongs before connecting synchronisation.

1. A **personal workspace** is separate from the company's shared records. On Apple devices, private iCloud can keep supported data together on your own Apple devices using the same iCloud account, once connected.
2. A **company workspace** uses company sign-in and the company service. Verify the company, user and permitted access before creating or changing shared records.
3. Share or connect only the workspace and records that belong in the company. Read the summary before confirming a transfer or opening an existing shared workspace.
4. Check storage status and the latest sync. Resolve a pending upload or a problem before issuing another document that could duplicate the first.
5. If a record is missing on another device, check the company, workspace, permissions and connection first. Export a backup before choosing a restore that replaces local data.

Signing in does not move personal records

Company sign-in, web setup and workspace switching do not automatically move personal customers or documents into the company. Private iCloud and company access are different connections. An exported backup is also separate from synchronisation.

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Web access step by step

Use the same company account from a supported browser on a computer or tablet.

1. Open the company area in WorkFiled and verify that you are signed in as the owner of the correct company. Browser access requires the relevant app or company entitlement.
2. Open the web app from the app page and choose company sign-in. Use your usual company login where offered, or an already registered passkey. A passkey is optional; the following steps explain how to set one up.
3. Find **Web access** → **Set up web access** in the company area. Select setup to check your existing browser access.
4. If the app confirms that **your passkey is ready**, open the web app and use that passkey to sign in.
5. Otherwise, the app displays a **private setup code**. Open the web app using the app's link and follow the website's setup to create your own passkey. The code lasts 24 hours; generating a new code replaces the previous unused code.
6. Check the company and workspace after signing in. Open the records and original documents you have shared with the company. If setup fails, verify company sign-in, app access and the connection, then try again.

Keep access private

Never share a setup code or passkey with a colleague or customer. Employees use their own permitted access. The browser company area shows shared company data; personal Apple records do not appear there automatically.

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Exports, backups and restore

Use PDF for customer documents, CSV for selected figures and a full backup when you need a restorable copy.

1. Share a customer document from its PDF view. Use the saved original for issued documents.
2. Open **Settings** → **Backup & export** and choose **Export internal CSV** for spreadsheet review. Share the file with people authorised to see internal information.
3. Save open changes and choose **Export full backup**. Save the package in **Files** somewhere you can access if you change devices.
4. Choose **Restore from backup** and select the package in **Files**. Read the replacement message and check the workspace after restoring. Open an original PDF to verify it.

Before restoring

Export a copy of your current workspace first. A restore can replace the data stored on the device.

Android and recovery copies

Use saved recovery copies to inspect earlier contents without changing the originals. Private backups follow the platform’s format and cannot simply be merged. Shared company records and issued PDF originals travel through the company service. On Android, ZIP export preserves the exact original PDF files.

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Pro, troubleshooting and support

Find answers about access, team work and documents.

1. Open **Settings** → **WorkFiled Pro** for plans or to restore an Apple purchase. On Apple, the 14-day trial starts with the first App Store download and ends without an automatic charge. Saved documents remain available to read, export and back up.
2. **A colleague cannot find a visit.** Check that they signed in to the right company, that the visit was published and assigned, and that you are looking at the same date.
3. **A customer needs a document.** Find the exact quote, saved job report or issued invoice and share the PDF from that record.
4. **Bank details have changed.** Update your defaults for new invoices and check the details on the new draft. Previous issued documents retain their original content.

Contact

Contact WorkFiled support if the issue persists. Include the steps, device and app version, and redact customer information in screenshots.

Purchases and access on Apple, Android and the web

On Apple, use **Restore purchases** with the Apple account that bought the subscription. On Android, use purchase and restoration with the same Google account that bought it in Google Play. Manage or cancel in the store that bills you. Company sign-in can grant access to shared company records according to your permissions; it does not move the subscription between stores. Do not buy another subscription simply to troubleshoot access.

The Android trial is verified after company sign-in and an authorised Google Play installation. Changing device or platform does not restart the company’s 14 days. The trial requires no card and starts no automatic charge. Deleting an account does not cancel a store subscription. Saved documents remain readable and exportable after access expires.

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