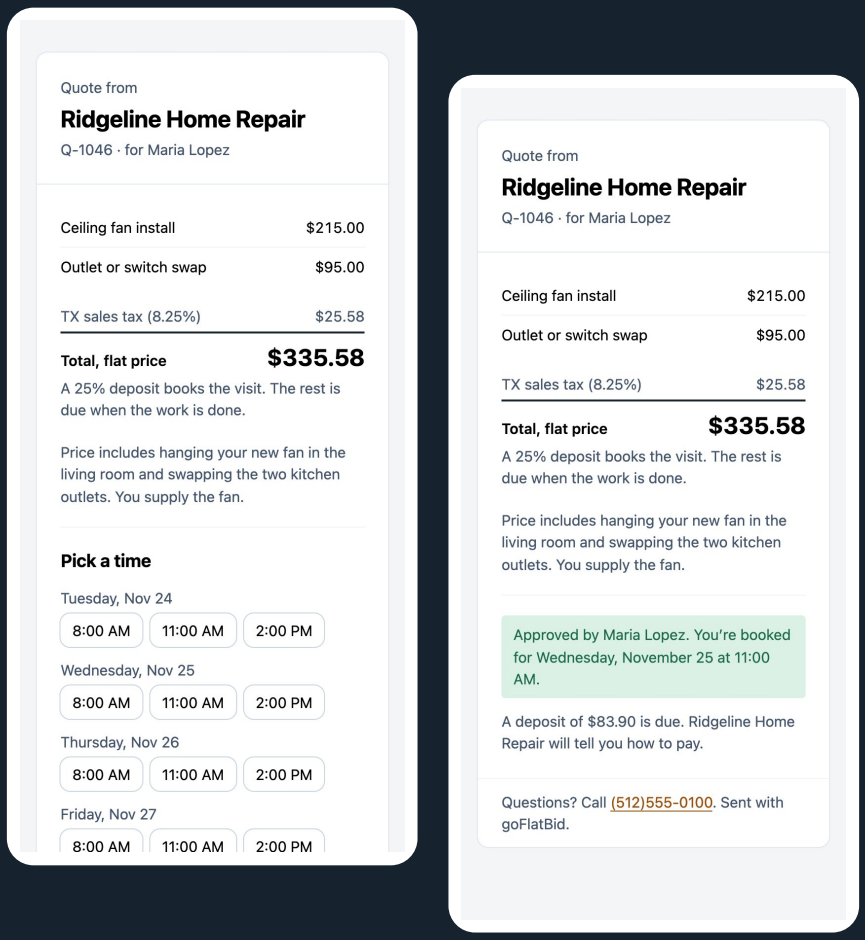
goFlatBid

From quote to money in the bank

An app walkthrough with step-by-step how-tos

Quote, approval, booking, the job, the invoice and the payment, shown screen by screen with a real example job.



OVERVIEW

One link does the whole job

goFlatBid is quoting, scheduling and invoicing for small trade businesses of 1 to 5 people. Every task has one flat price from your price book. Your customer gets a single link to approve the quote, book a time and pay the deposit. When you tap **Done**, the invoice goes out by itself and reminders follow until it is paid.

This guide follows one real example from start to finish: Ridgeline Home Repair quoting Maria Lopez for a ceiling fan install and an outlet swap.

1	**Build the quote** From your price book, in about a minute.
2	**Send it** By text and email, with your own note.
3	**Customer approves** Signs, picks a time and pays the deposit.
4	**It lands on your schedule** No phone tag. Unanswered quotes get a follow-up.
5	**Do the work** The tech opens the job, navigates and clocks in.
6	**Mark it done** The invoice goes out with the deposit already credited.
7	**Get paid** Card, bank transfer, Apple Pay or Google Pay. Reminders chase it for you.
8	**Money in the bank** Stripe pays out to your bank. QuickBooks gets the records.

Who does what

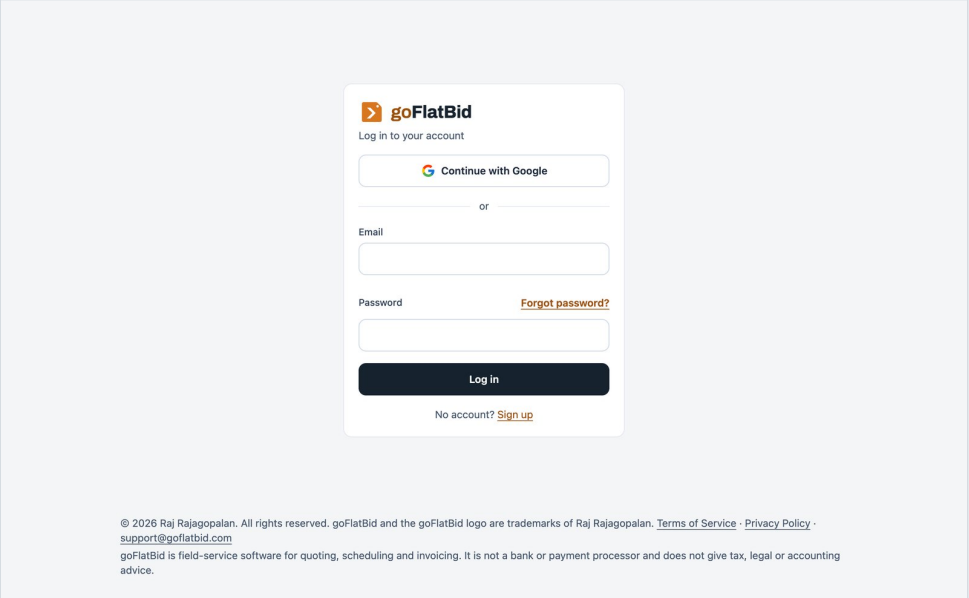
Owner sets prices, settings, payments and QuickBooks. **Office** people quote, schedule, invoice and fix time entries. **Techs** see their jobs, clock in and out, add photos and mark work done. Techs never see labor costs or profit.

BEFORE YOU START

Set up in about 10 minutes

You do this once. After that, every job follows the same eight steps.

1. **Sign up** at app.goflatbid.com once goFlatBid launches. The 14-day trial needs no card.
2. **Load your price book.** Start from your trade's template (handyman, plumbing, electrical, HVAC, cleaning, pressure washing, lawn) or import a spreadsheet. Every task gets one flat price, parts and labor in.
3. **Import your clients** from a CSV file exported from the app you use now.
4. **Fill in Settings › Business:** your name, logo, phone, sales tax, the deposit to book (for example 25%), and payment terms (for example Net 7).
5. **Connect Stripe** so customers can pay deposits and invoices by card, bank transfer (ACH), Apple Pay or Google Pay. The money goes to your own Stripe account.
6. **Connect QuickBooks** (optional) and choose what syncs: customers, items, invoices, payments.
7. **Invite your team** as office or tech users (Crew plan).



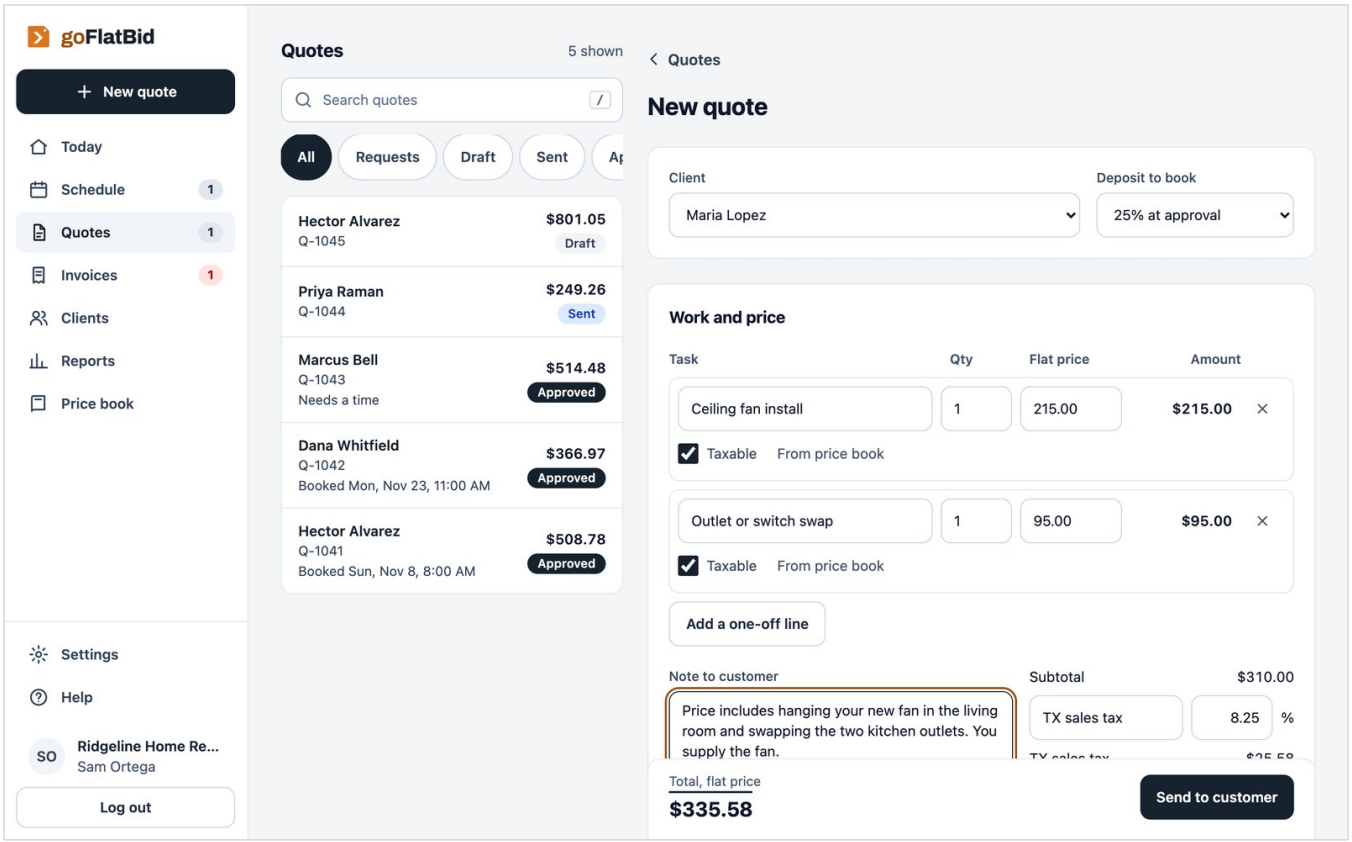
The sign-in screen. Two-step verification is available for every user.

STEP 1

Build the quote

Pick tasks from your price book. The total, tax and deposit work themselves out.

1. Click **New quote** (top left, or the orange + button on a phone).
2. Choose the **client**. New customers can be added from the Clients page in seconds.
3. Type in **Search the price book** and tap each task. Here: *Ceiling fan install* ($215) and *Outlet or switch swap* ($95). Change the quantity if needed, or add a one-off line.
4. Check the **deposit to book** (25% here) and the sales tax. Both come from your settings.
5. Add a **note to the customer** that says what the price includes.



Q-1046 for Maria Lopez: two flat-price tasks, Texas sales tax at 8.25%, total $335.58.

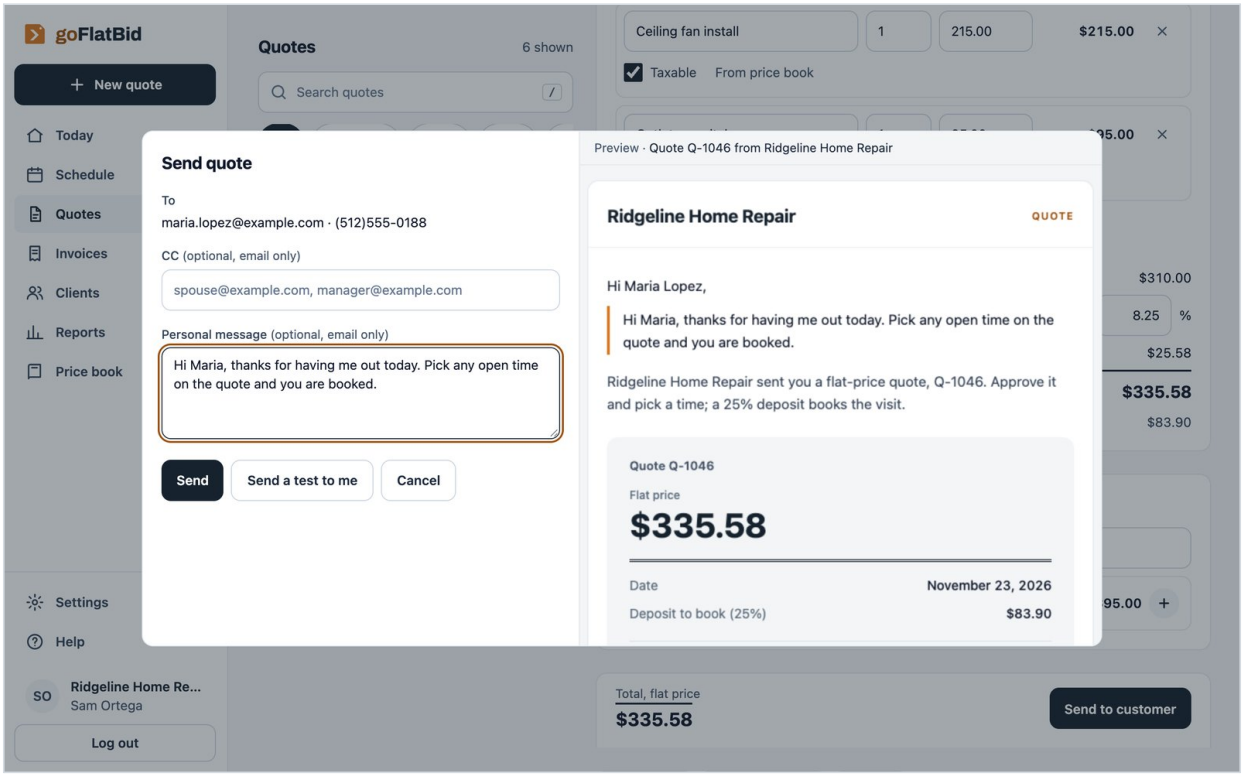
Tip. Every line shows **From price book**, so your prices stay the same from tech to tech and job to job.

STEP 2

Send it

One tap sends the quote by text and email. Your customer needs no app and no login.

1. Click **Send to customer**.
2. Add a **personal message** and anyone to CC (a spouse or property manager). Use **Send a test to me** to see exactly what they get.
3. Click **Send**. The quote shows **Sent** in your list, and later **Viewed** once the customer opens it.



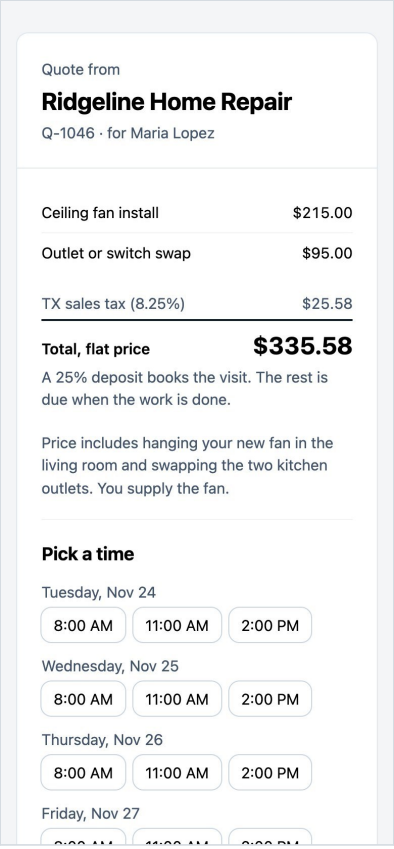
The send dialog shows who it goes to and lets you add a personal note.

Automatic follow-up. No answer? goFlatBid sends one friendly follow-up by text and email after the number of days you choose (3 by default). Turn it off or change it in Settings › Business › Win more work.

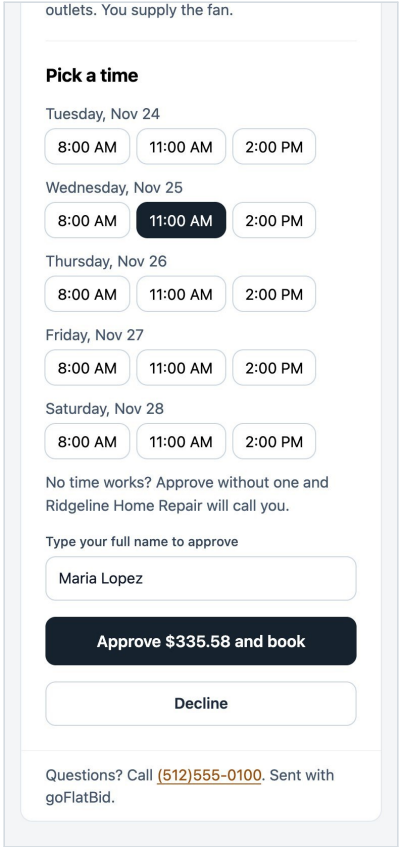
STEP 3

Your customer approves, books and pays the deposit

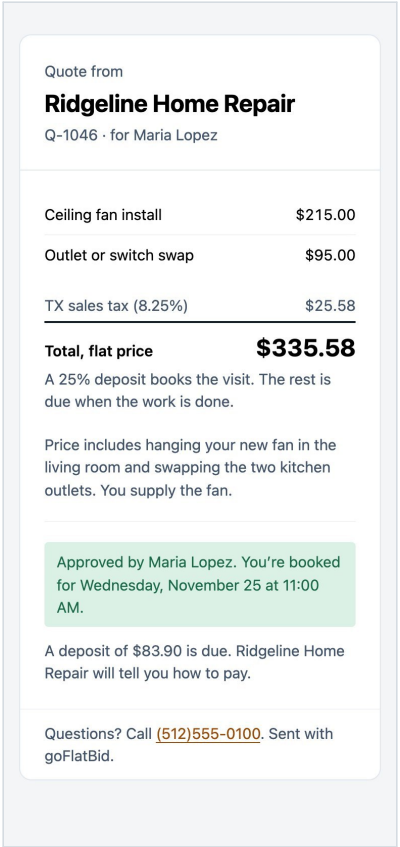
This all happens on the customer's phone, from the one link. Here is what Maria sees.



The flat price, with your note.



She picks an open time and types her name.



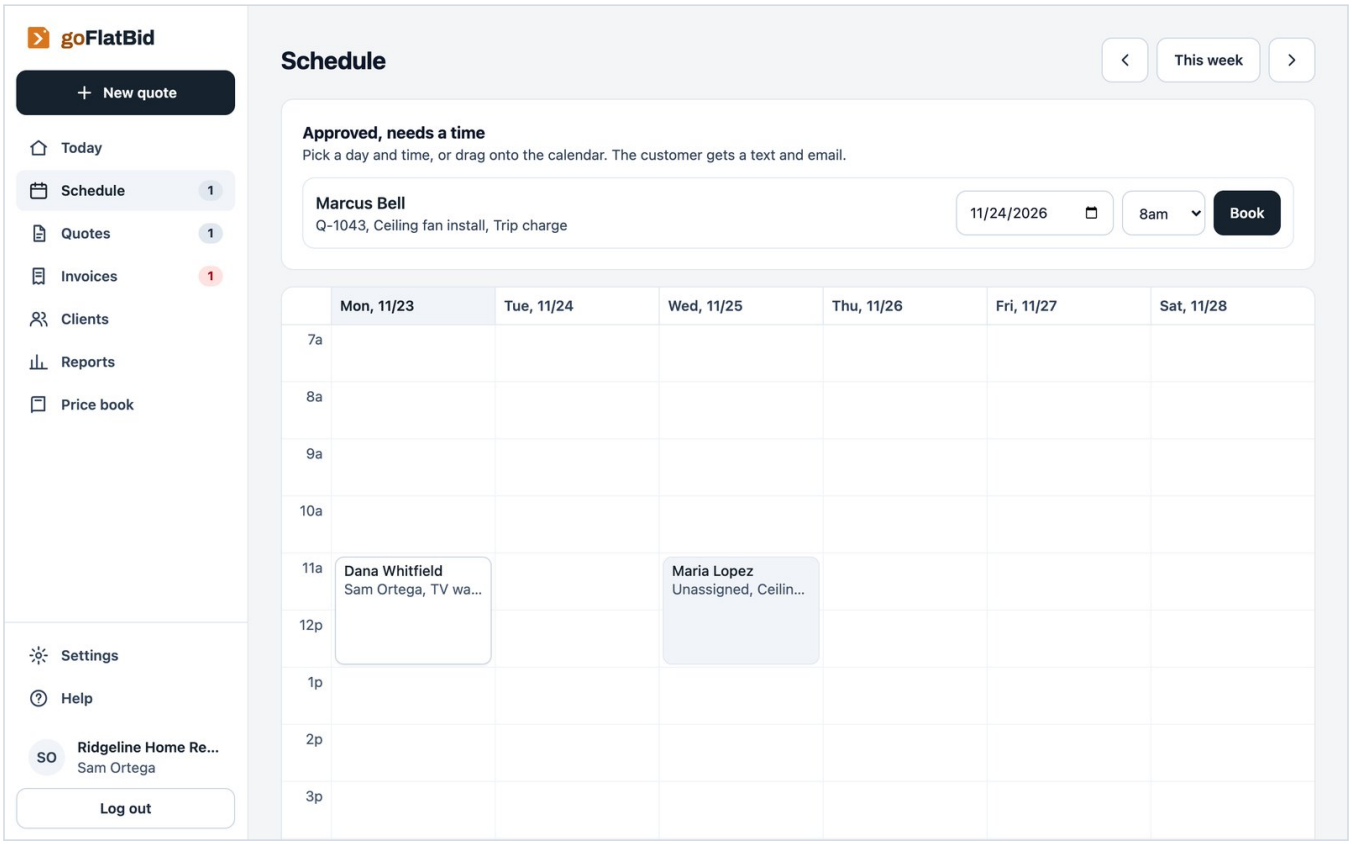
Booked. She pays the $83.90 deposit.

1. The customer opens the link and sees each task, the tax and one flat total. There is no hourly math.
2. They choose from **open times** on your calendar. If none suits them, they can approve without a time and you call them.
3. They **type their full name to approve**. That is their signature, and the time is stored with it.
4. They **pay the deposit** by bank transfer (ACH) or card through Stripe.

STEP 4

It lands on your schedule

Approved jobs with a time go straight onto the calendar. Approved jobs without one wait at the top.



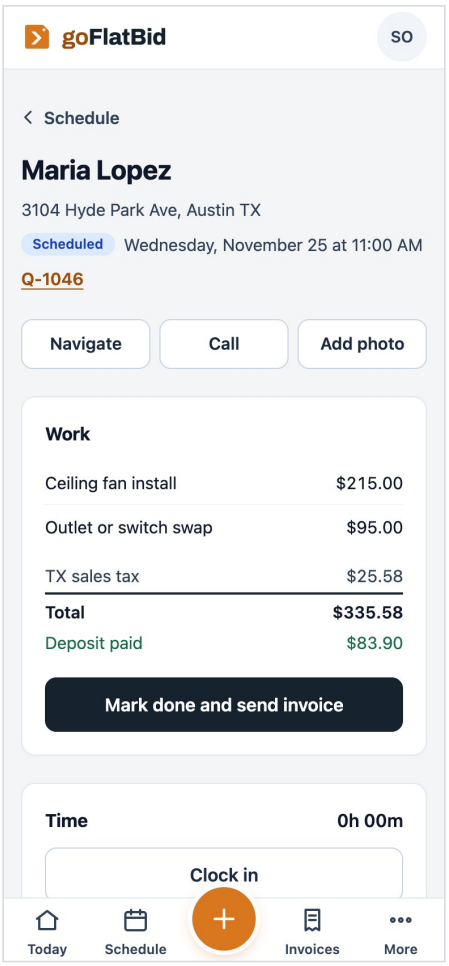
Maria's job sits on Wednesday at 11:00 AM. Marcus approved without a time, so he waits under "Approved, needs a time".

1. Open **Schedule** to see the week. Use the arrows to move between weeks.
2. To book a job that needs a time, pick a day and time and click **Book**, or drag it onto the calendar. The customer gets a text and an email.
3. Assign the job to a tech from the job page.

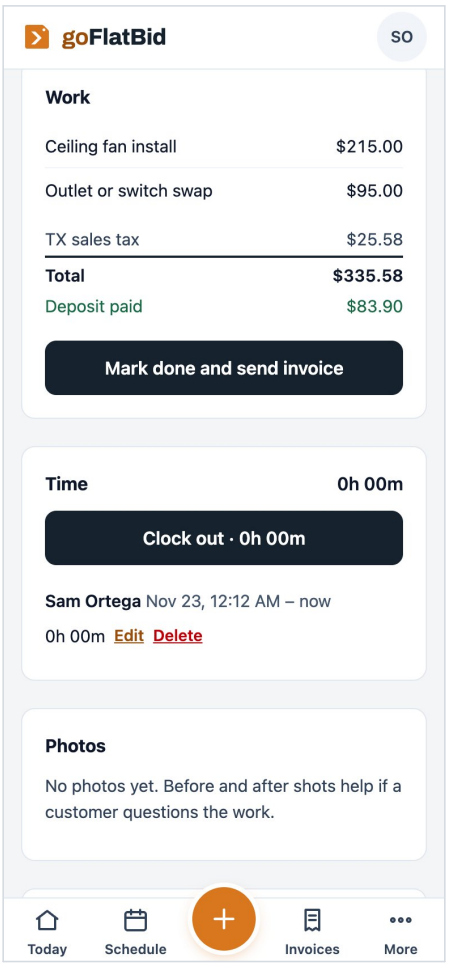
STEP 5

Do the work

The tech runs the visit from their phone.



The job: address, work, deposit paid.



Clocked in. The timer runs.

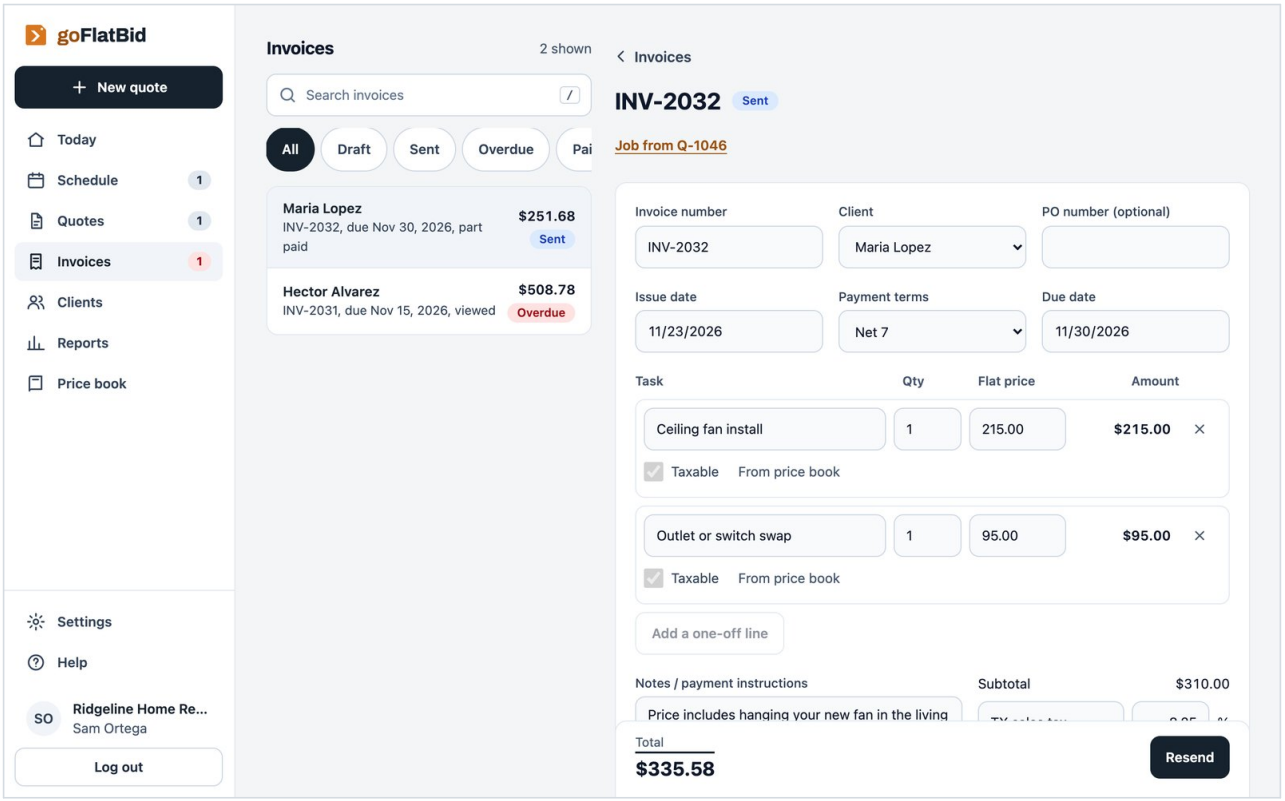
1. Open the job from **Today** or **Schedule**.
2. Tap **Navigate** for directions or **Call** to reach the customer.
3. Tap **Clock in** on arrival and **Clock out** when finished. The office can correct a time that was forgotten.
4. Tap **Add photo** for before and after shots. They help if a customer questions the work.

STEP 6

Mark it done. The invoice sends itself.

One button closes the job, creates the invoice from the quote and sends it.

1. On the job, tap **Mark done and send invoice**.
2. goFlatBid creates the invoice from the approved quote. The deposit is already credited, so Maria owes the balance of **$251.68**.
3. The invoice goes to the customer by text and email with a pay link. Payment terms (Net 7 here) set the due date.
4. If you set a review link, the customer also gets a short thank-you asking for a review.

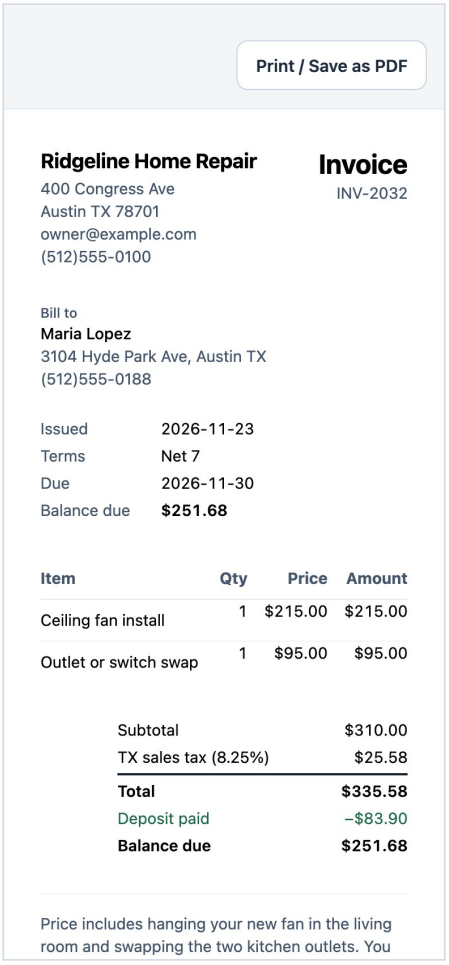


INV-2032 is created from Q-1046 and sent. You can still edit lines, add attachments or resend.

STEP 7

Get paid

The customer pays the balance from the invoice link. If they don't, goFlatBid follows up for you.


Print / Save as PDF

Ridgeline Home Repair
400 Congress Ave
Austin TX 78701
owner@example.com
(512)555-0100

Invoice
INV-2032

Bill to
Maria Lopez
3104 Hyde Park Ave, Austin TX
(512)555-0188

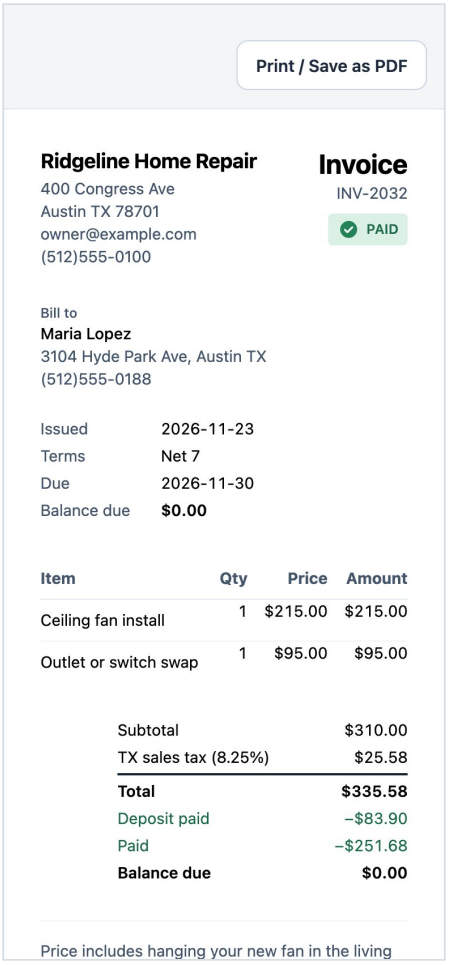
Issued	2026-11-23
Terms	Net 7
Due	2026-11-30
Balance due	**$251.68**

Item	Qty	Price	Amount
Ceiling fan install	1	$215.00	$215.00
Outlet or switch swap	1	$95.00	$95.00

Subtotal	$310.00
TX sales tax (8.25%)	$25.58
Total	**$335.58**
Deposit paid	−$83.90
Balance due	**$251.68**

Price includes hanging your new fan in the living room and swapping the two kitchen outlets. You

The invoice link: Pay $251.68.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Ridgeline Home Repair
400 Congress Ave
Austin TX 78701
owner@example.com
(512)555-0100

Invoice
INV-2032
PAID

Bill to
Maria Lopez
3104 Hyde Park Ave, Austin TX
(512)555-0188

Issued	2026-11-23
Terms	Net 7
Due	2026-11-30
Balance due	**$0.00**

Item	Qty	Price	Amount
Ceiling fan install	1	$215.00	$215.00
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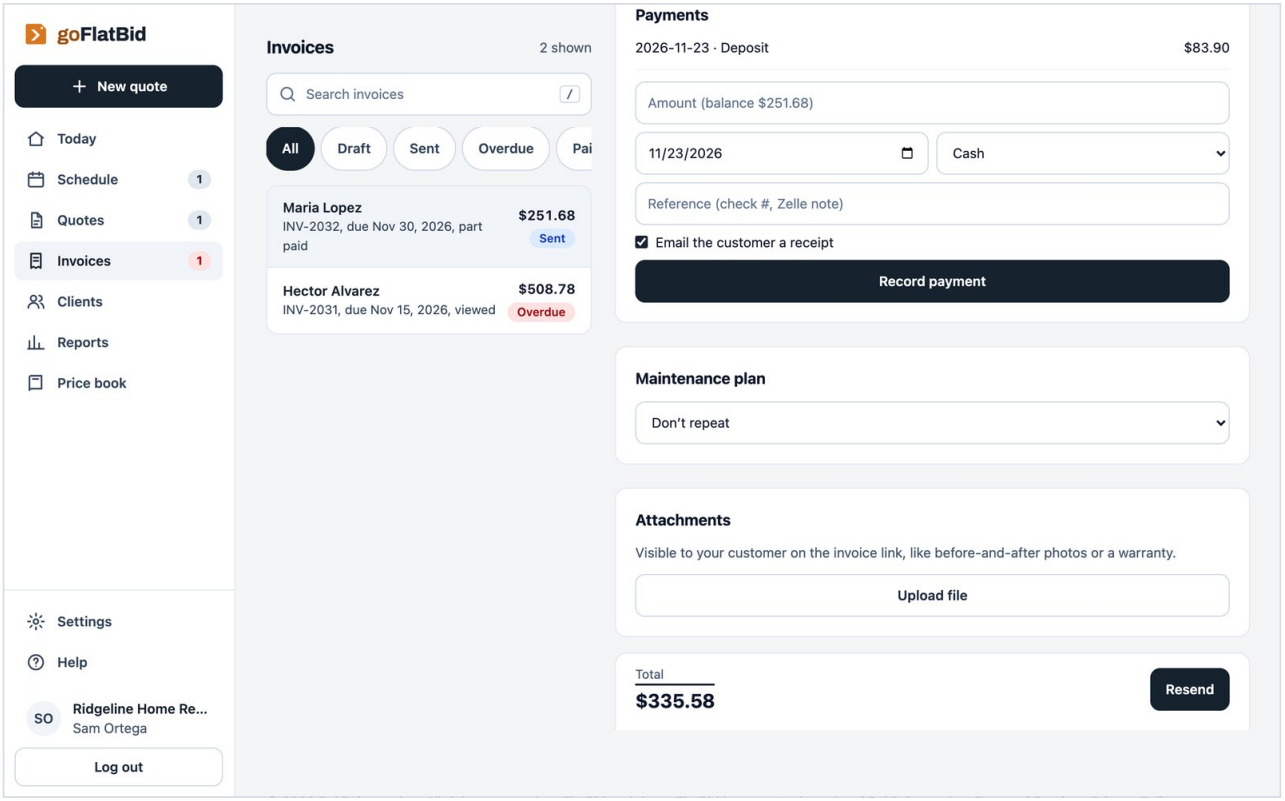
Subtotal	$310.00
TX sales tax (8.25%)	$25.58
Total	**$335.58**
Deposit paid	−$83.90
Paid	−$251.68
Balance due	**$0.00**

Price includes hanging your new fan in the living

After payment: marked PAID, balance $0.00.

1. The customer taps **Pay** and pays by card, bank transfer (ACH), Apple Pay or Google Pay through Stripe.
2. The invoice marks itself **Paid** and the customer gets a receipt. You get a notification.
3. **Not paid yet?** Text and email reminders go out 3 days before the due date, on the due date, and 3, 7 and 14 days late. You can add a late fee in Settings.
4. **Paid by cash, check or Zelle?** Open the invoice, enter the amount under **Payments** and click **Record payment**. A receipt goes out if you leave the box ticked.

Recording a cash or check payment



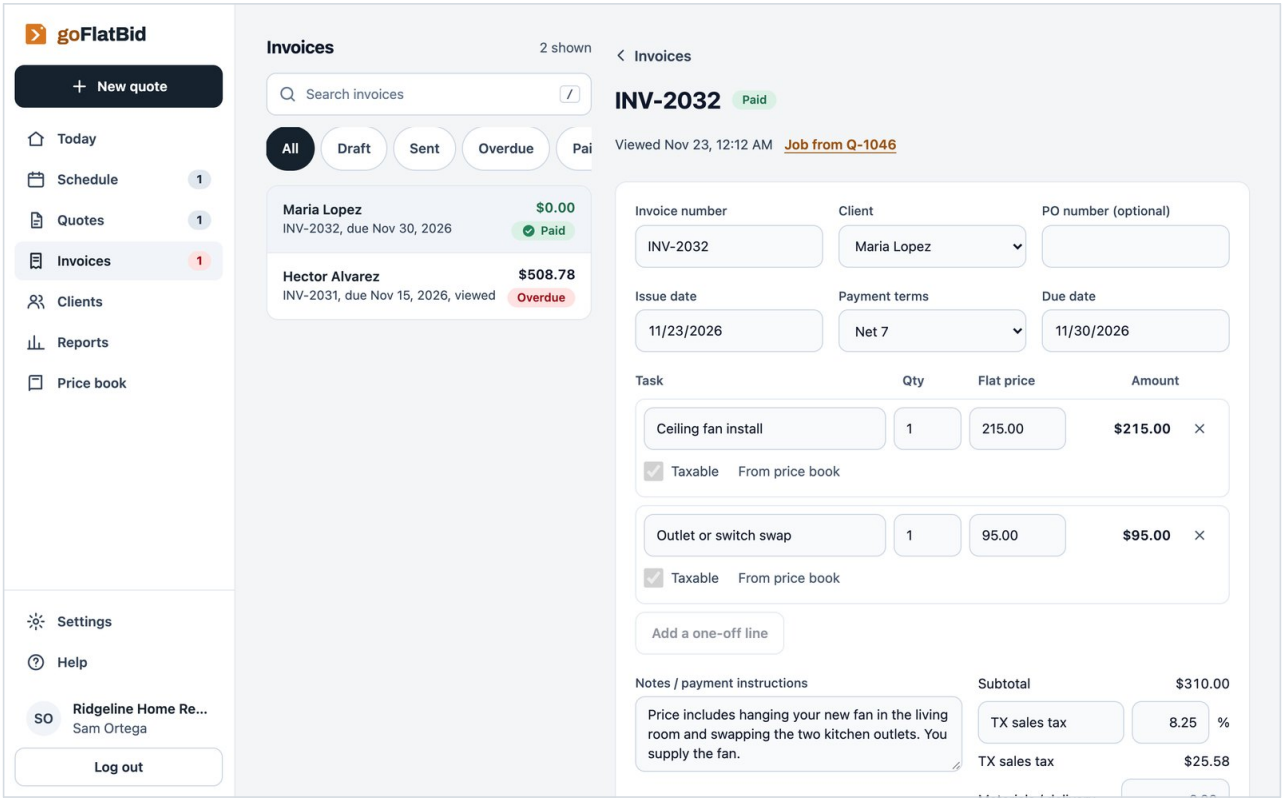
The Payments panel lists the deposit already received and lets you record the rest by hand.

Tip. Bank transfers (ACH) take a few business days to clear. Until then the invoice shows **Bank payment processing**, so no one chases a payment that is already on its way.

STEP 8

Money in the bank

The job is closed, the books are right, and the cash is on its way to your account.

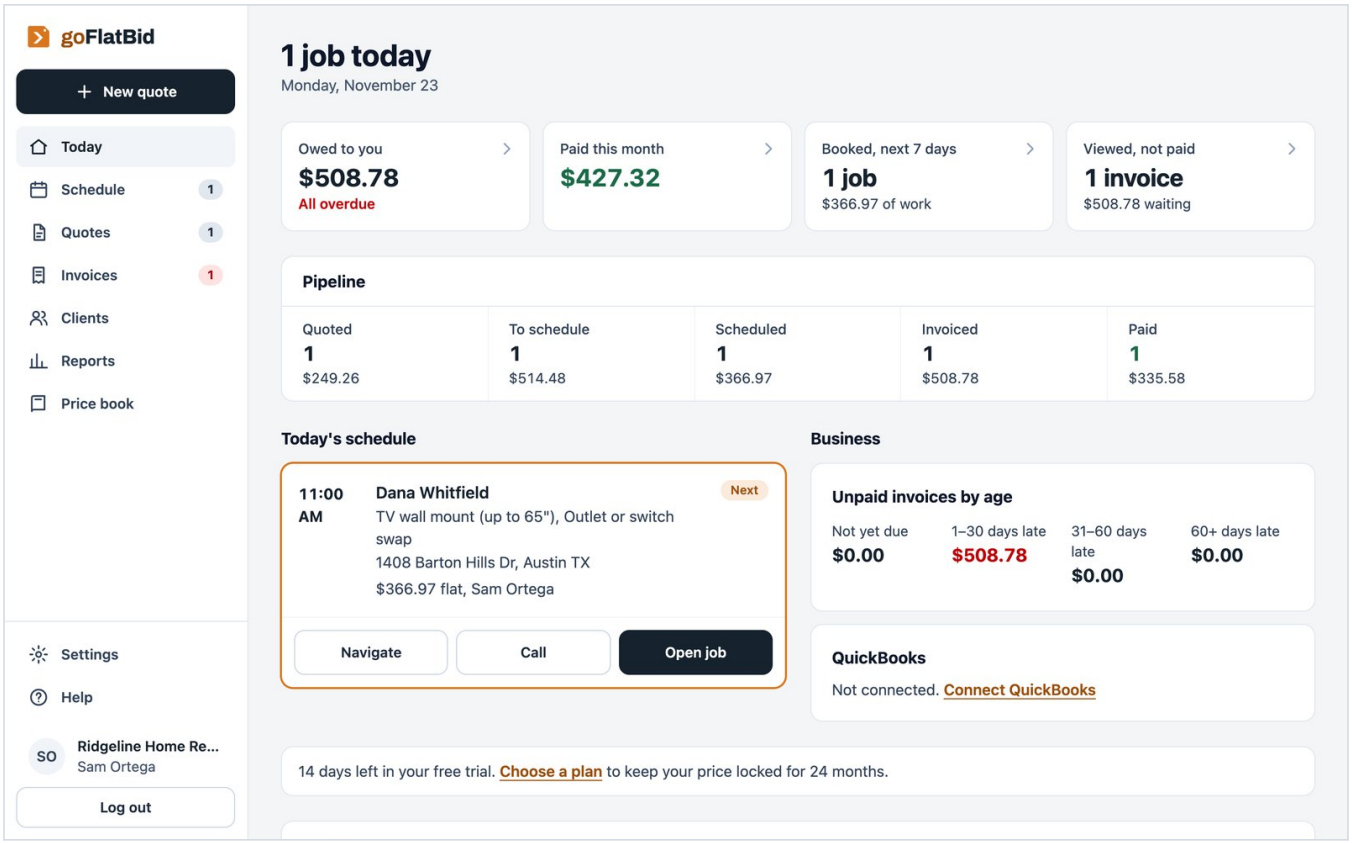


INV-2032 is Paid. Every step, from approval to payment, is in the audit trail.

1. **Stripe pays out** to your business bank account on your Stripe payout schedule. goFlatBid takes nothing from your payments; Stripe's card and bank fees are the only payment costs.
2. **QuickBooks** gets the customer, the invoice and both payments, if you turned those on. Every sync is logged, and a failed one has a **Retry** button.
3. **Today** shows the result: money owed to you, money paid this month, and your pipeline from quoted to paid.

Your day at a glance

The Today screen updates as soon as the payment lands: **Paid this month** rises and the job moves to **Paid** in the pipeline.



Today: what you're owed, what came in this month, what's booked, and the pipeline.

QUICKBOOKS ONLINE

Keep QuickBooks in sync

Connect QuickBooks Online once and your customers, price book, invoices and payments go into your books as the work happens. No exports and no double entry. Owners and office staff set this up; techs never see it.

Connect

1. Go to **Settings › QuickBooks** and click **Connect to QuickBooks**.
2. Sign in on Intuit's page and choose your company. goFlatBid never sees your QuickBooks password, and its access keys are stored encrypted.
3. You come back to goFlatBid with a green **Connected to** badge showing your company name.

Choose what syncs

Under **What syncs**, tick only what you want. Each one is separate.

- **Customers:** new and edited clients become QuickBooks customers, with email, phone and address.
- **Price book items:** each task becomes a QuickBooks service item.
- **Invoices:** post when sent, with the same invoice number, every line and sales tax on the taxable lines. Draft invoices never sync.
- **Payments:** card, bank, cash and check payments are applied to the invoice. A deposit syncs as soon as the job is invoiced.

Map your accounts

1. Under **Mapping**, pick the **Income account for price book items**. If you skip it, goFlatBid uses your first income account.
2. Pick where to **Deposit payments into**. The default is Undeposited Funds, the usual choice if you group deposits in QuickBooks.
3. Click **Save**.

How syncing works

- It's automatic. Records sync when you add or edit a client or task, send an invoice, or record a payment.
- Edits update the same QuickBooks record. Nothing is entered twice.
- goFlatBid only creates and updates its own records. It never deletes anything in QuickBooks and never creates vendors.
- Card and bank payments carry their Stripe reference, so you can match them to bank deposits.
- A line that isn't from your price book goes to a "Flat-rate service" item, so every invoice line has a home.

Check the sync log and fix problems

1. Your **Today** screen shows **All synced** with the last sync time, or **Sync failed** with a link to fix it.
2. In **Settings › QuickBooks**, the **Sync log** lists every record with when it synced, its status and how many tries it took.
3. Fix the cause, then tap **Retry** on the failed row. You never re-enter the invoice.

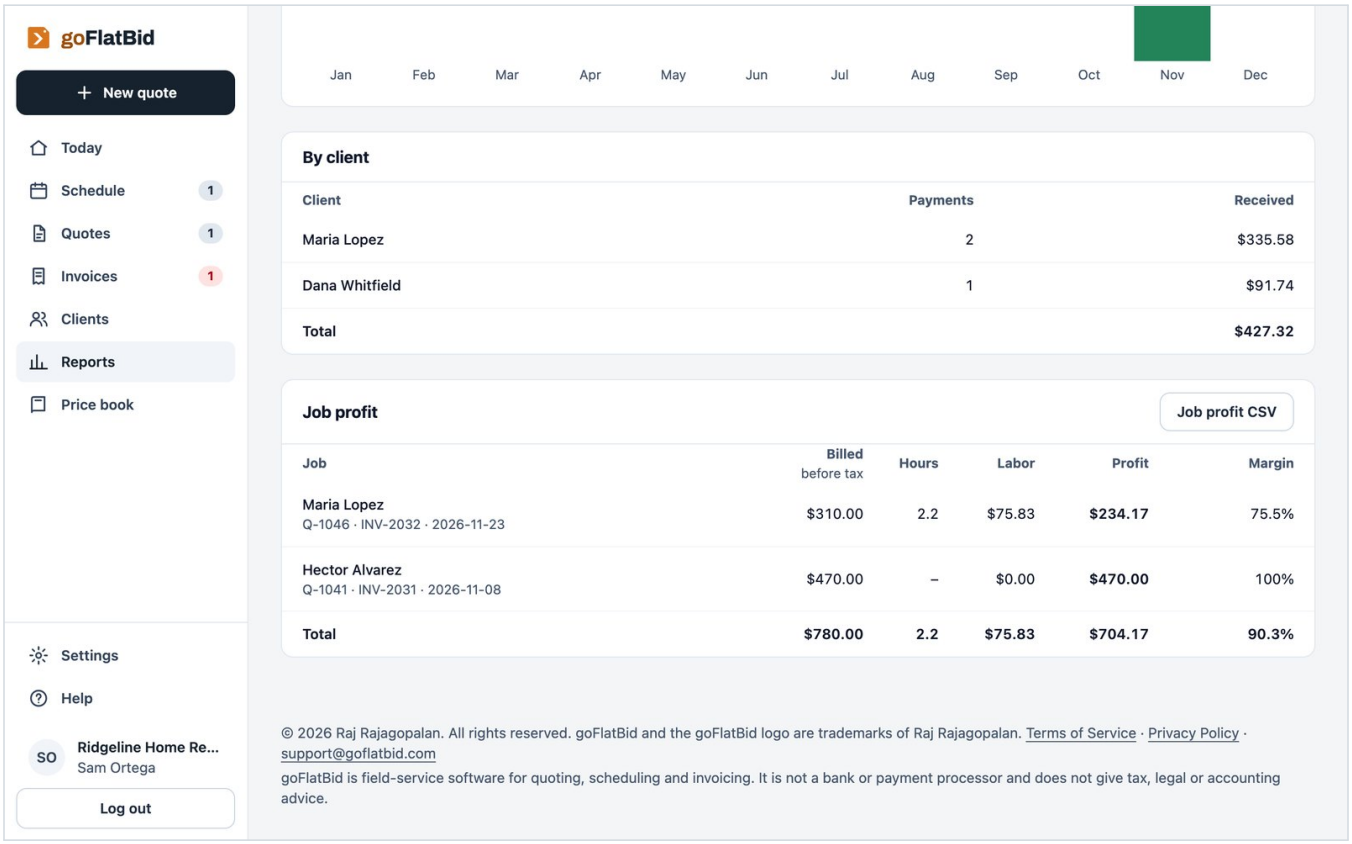
If the log says	Do this
QuickBooks already has a customer, vendor or employee with this name.	Rename the client in goFlatBid (for example, add the street) and tap Retry.
This record was changed in QuickBooks since the last sync.	Tap Retry. goFlatBid pulls the latest version and syncs again.
This record was deleted or made inactive in QuickBooks.	Restore it in QuickBooks, then tap Retry.
QuickBooks sign-in expired.	Reconnect QuickBooks in Settings, then tap Retry on anything that failed.

Disconnect. The owner can click **Disconnect** in Settings › QuickBooks at any time. Syncing stops and goFlatBid's access is revoked. Everything already in QuickBooks stays there.

KNOW YOUR NUMBERS

See which jobs make money

Clocked time and your hourly labor cost turn into a profit figure for every job. Sales tax is left out, because it is not your money.



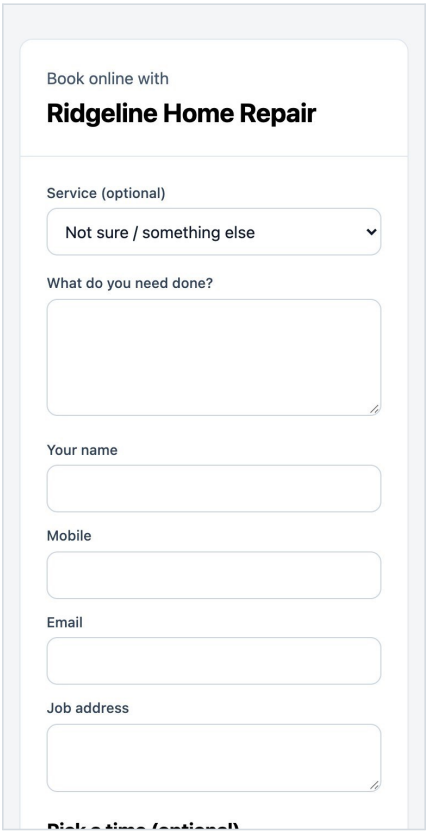
Reports › Job profit. Maria's job: $310.00 billed before tax, 2.2 hours, $75.83 labor, $234.17 profit, 75.5% margin.

1. Set **Hourly labor cost per person** in Settings (wages plus taxes). Only owners and office users see it.
2. Open **Reports** and scroll to **Job profit**. Pick the year at the top.
3. Click **Job profit CSV** to send it to your accountant.

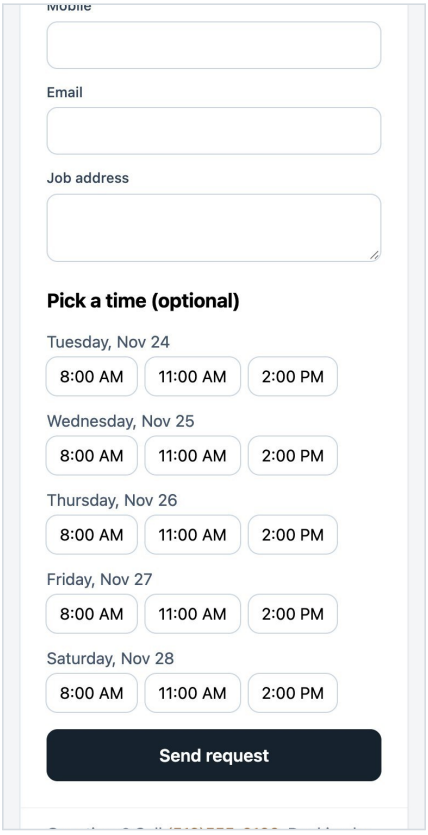
WIN MORE WORK

Bring in jobs while you're on the tools

Three settings that cost nothing to turn on: an online booking page, automatic quote follow-ups and review requests.



Your booking page.

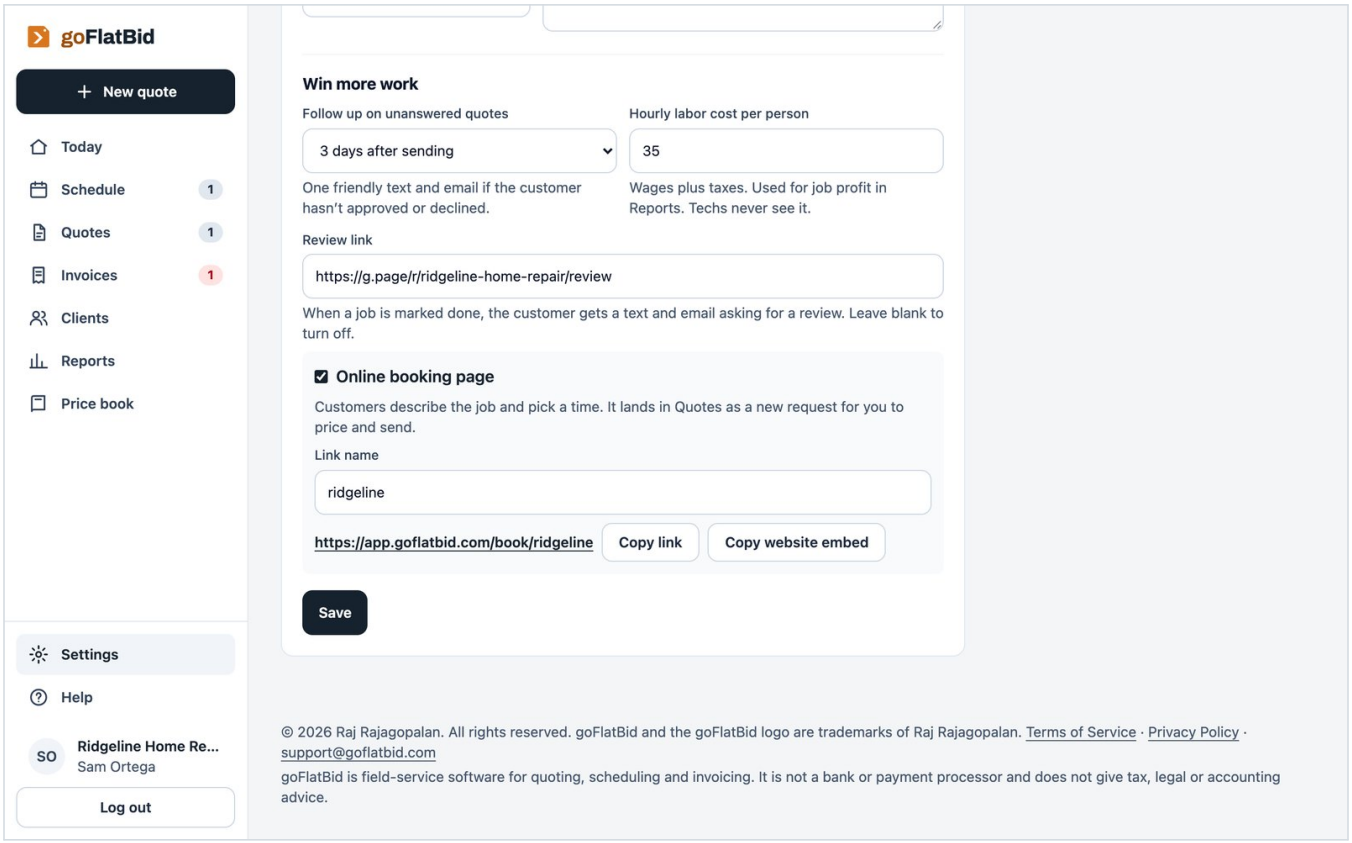


Customers can pick a time.

1. Go to **Settings › Business › Win more work** and tick **Online booking page**. Choose a link name, for example *ridgeline*.
2. Share the link, or click **Copy website embed** to put the form on your own website.
3. Requests arrive in **Quotes › Requests**. Price them from your price book and send, and the rest of the flow is the same.

Turn them on

All three live on one settings card. Changes take effect for the next quote, job or booking.



Settings › Business › Win more work: follow-ups, labor cost, review link and the booking page.

Quote follow-ups. One friendly text and email after 2, 3, 5 or 7 days if the customer has not approved or declined.

Review requests. Paste your Google review link. When a job is marked done, the customer is asked for a review.

Booking page. Customers describe the job and optionally pick a service and a time. Their description stays private to you and goes on the job notes for the tech.

QUICK REFERENCE

Quote to cash checklist

Step	Who	Where in goFlatBid	What happens automatically
1. Build the quote	Owner, office	New quote	Tax, total and deposit are worked out
2. Send it	Owner, office	Send to customer	Text and email; follow-up if unanswered
3. Approve and book	Customer	Quote link	Signature, time booked, deposit paid
4. Schedule	Owner, office	Schedule	Booked jobs appear on the calendar
5. Do the work	Tech	Job page	Time is tracked for job profit
6. Mark done	Tech	Mark done and send invoice	Invoice created and sent, deposit credited, review request
7. Get paid	Customer	Invoice link	Receipt; reminders until paid
8. Money in the bank	Owner	Today, Reports	Stripe payout; QuickBooks sync

Common questions

Does my customer need an app or an account?

No. They open a link from a text or an email.

What if the customer agrees by phone?

Open the quote and click **Mark approved**. The job is created the same way.

Can I change an invoice after it is sent?

Yes. Edit and click **Resend**. Changes are logged in the history.

What does it cost to take payments?

goFlatBid takes nothing from your payments. Stripe's standard card and bank fees apply.

What does goFlatBid cost?

Solo $19/month for one person. **Crew** $39/month for up to 5 people with office and tech roles. Every feature is on both plans, and your price is locked for 24 months from signup.

Get started. goFlatBid is launching soon. Join the waitlist at **goflatbid.com** to become a founding member: 50% off Solo or Crew for your first 12 months. Questions: **support@goflatbid.com**.