SOP-01 Moving a cleaning site from Jobber to Google Workspace and QuickBooks Online

Work sample: realistic data, built to show how I'd handle this work | Owner: Office lead | Review: after each wave, then quarterly

Purpose

Each site has one place for each thing: visits in the cleaner's Google Calendar, checklists and records in Google Drive, and billing only in QuickBooks Online. This SOP is used for every site moved from Jobber during the waves, and for every new or changed site afterwards.

Before you start

- **Open** the site's row on Rate Reconciliation in Jobber-to-Google-and-QBO-Migration.xlsx. The status must be Matched, or the bookkeeper has marked Sign-off as Approved.
- **Do not** move a site while its wave shows BLOCKED on Cutover Waves. All six gates must read PASS.
- **Have ready** the site's Calendar Build row and the Drive folder path next to it.

Steps

1. **Drive folder.** Check Clients/<Client>/<Site - Suburb> exists with its five folders. Fill 01 Scope & Checklist from the Jobber job. Put keys, alarm and access codes only in 02 Site Access.
2. **Sharing.** Sharing is by group, never by person: Cleaners can view 01 and upload to 05; Office edits everything; Bookkeeper sees 03 to 05. Do not share 02 Site Access with cleaners.
3. **Calendar.** Import the cleaner's .ics file (one per cleaner, from results/calendar) into their roster calendar, or create the event from the Calendar Build row: title, first date, time, repeat rule, address and description.
4. **Check the event.** Open it on a phone as the cleaner would. The checklist link opens; there is no code anywhere in the title, location or description.
5. **Billing.** The bookkeeper checks the QBO recurring template: one template per site and service, amount = Monthly basis on Jobber Jobs (weekly work at rate x visits x 52/12), next date the 1st of next month.
6. **Switch off Jobber invoicing.** In the same sitting, set the Jobber job to invoice outside Jobber, then make the QBO template active. A site is never billed by both, not even for a day.
7. **Visit reports.** Add the site to the visit form list. Cleaners submit the form after each visit; photos land in 05 Visit Reports.
8. **Record it.** On Rate Reconciliation set Sign-off to Done with the date and your initials. On Exceptions set the row to Done.
9. **Close in Jobber.** After the first full week runs cleanly, archive the Jobber job. The Jobber export stays in Drive under _Archive/Jobber Exports (view only).

Rules

- One billing system per site at any time. If unsure, ask the bookkeeper before anything is sent.
- Change a rate, a schedule or a cleaner in this order: Rate Reconciliation, then QBO template, then Google Calendar.
- Access codes are read out or texted by the office. They never go in a calendar event, an email to the team or a chat group.
- Nothing is deleted during the move. Ended work is made inactive and kept.

Month end (bookkeeper, before the QBO recurring run)

- Credit skipped visits from the visit forms.
- Compare QBO recurring templates with the site list: one active template per active site and service, none for ended work.
- Re-run the billing check for the month; any Over-billed or Under-billed row goes on Exceptions with an owner.

Weekly check (office lead, 10 minutes)

- No two events overlap on one cleaner's calendar (Roster Clashes).
- Visit reports received for every visit; chase gaps the same day.
- Search all calendars for the words alarm, code, key safe, lockbox and keypad: nothing found.