

01 • EXECUTIVE SUMMARY

Billing is fixed before anything moves, then the roster moves region by region

The problem. Jobber still raises invoices for 77 active jobs while the bookkeeper bills the rest from QBO recurring templates. Nobody had compared the two. Weekly work was priced two ways, the 1 July rate rise did not reach every template, and 66 site notes held alarm and key-safe codes that would have gone straight into cleaners' phone calendars.

What the check found. Of 363 jobs, 195 move as is. 15 sites are billed by *both* systems (\$42,156.02 over three months), 8 have two live templates, 9 are not billed at all, 19 weekly templates use 4 weeks a month instead of 52/12 and 31 missed the rate rise. In total \$73,774.99 was over-billed and \$24,094.07 under-billed between August and October.

The move. 339 recurring events (one calendar per cleaner, codes removed), 1,670 Drive folders with sharing by role, and a pilot with 2 cleaners on 2026-12-07 that passes all six gates. Waves 1 to 4 stay blocked until their billing items are cleared.

157

jobs and templates needing a billing fix

\$2,323.02

a month of rate and basis shortfall

11

roster clashes to resolve

0

access codes in calendar text

Recommended next steps

- Switch off Jobber auto-invoicing on the 15 double-billed sites this week and credit the duplicates.
- Owner confirms the 7 ended jobs still billing in QBO.
- Fix the 50 rate and basis templates from December.
- Run the pilot on 2026-12-07; release each wave when its gates show PASS.