

WORK SAMPLE · FIELD SERVICE MIGRATION

Leaving Jobber without losing a visit or a dollar

A Melbourne commercial cleaning business with 158 clients, 252 sites, 339 active recurring jobs and 60 cleaners moves off Jobber before its renewal on 15 February 2027: rosters to Google Calendar, site files to Google Drive, billing to QuickBooks Online recurring invoices. Three months of billing from both systems are checked, and each regional wave goes live only when six gates pass. A work sample: the data is realistic and every figure is computed from the files.

195

of 363 jobs move as is

\$73,775

over-billed Aug-Oct (credits owed)

\$24,094

under-billed Aug-Oct

32/32

controls pass

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.

Nine exports in, one checked move out

Inputs, as exported

SOURCE	SIZE
Jobber clients / properties	158 / 252
Jobber recurring jobs	363 (339 active; weekly / 4-weekly / monthly 276 / 66 / 21)
Jobber team	60 cleaners
Jobber visits and invoices, Aug-Oct 2026	7,313 visits, 231 invoices
QBO customers and sub-customers	420 (168 parents)
QBO recurring templates and invoices, Aug-Oct	289 templates, 884 invoices

Billing policy: weekly work is billed monthly at rate x visits x 52/12; 4-weekly work per run; monthly work at the rate. Rates rose 4% on 1 July 2026.

Approach

1. Profile both systems before changing anything.
2. Match QBO customers to Jobber clients, sub-customers to sites, templates to jobs.
3. Reconcile every job's rate and who bills it, and give each status one action and one owner.
4. Check three months of what should have been billed against both systems.
5. Build the roster in Google Calendar and the site files in Google Drive, with codes kept out of the calendar.
6. Move in a pilot and four regional waves, each behind six gates.
7. Prove it: 32 controls in the workbook and 12 tests against an answer key.

What the two systems look like today

MEASURE	VALUE
Active jobs invoiced by Jobber	77
QBO recurring templates	289
QBO parent customers vs Jobber clients	168 vs 158
Weekly templates on the x4 basis	19
Visits skipped Aug-Oct	145
Site notes holding an access code	66
Archived jobs in Jobber	24
Average rostered hours a week	911.9

What this tells us

- Two systems raise invoices and neither knows about the other, so a site can be billed twice or not at all.
- QBO has 10 more parent customers than Jobber has clients: duplicates keyed with a typo or an "- Accounts" suffix.
- A weekly clean billed at 4 visits a month loses about two visits a quarter; 52/12 is 4.33.
- Site notes are free text, and some hold alarm codes. Calendar events reach every cleaner's phone, so codes must come out first.

Eleven findings, each measured from the files

FINDING	SIZE	EFFECT (AUG-OCT)
Billed by Jobber and QBO	15 sites	\$42,156.02 over-billed
Two live QBO templates	8 sites	\$14,936.00 over-billed
Ended in Jobber, still billing in QBO	7 jobs	\$15,287.97 to confirm
Not billed anywhere	9 jobs	\$17,111.01 not invoiced
Weekly billed at x4	19 templates	\$4,449.06 short
Rate rise missed	31 templates	\$2,534.00 short
Billed only in Jobber (no template)	62 jobs	Will stop billing at cutover unless a template is made
QBO-only supply templates	6	\$1,395.00: confirm and keep
Duplicate QBO customers	10	Split statements and ageing
Roster clashes	11	Same cleaner, two sites, same time
Access codes in notes	66	Would leak into calendars

05 · OPTIONS APPRAISAL

How to leave Jobber safely

OPTION	BILLING ACCURACY (30%)	COST AND FIT (25%)	EFFORT TO RUN (25%)	CHANGE FOR CLEANERS (20%)	WEIGHTED /100
A. Stay on Jobber, fix invoicing inside it	3	1	3	5	58
B. Move all at once on one date	3	4	2	2	56
C. Fix billing first, then a pilot and regional waves behind gates (recommended)	5	4	4	4	86
D. Keep Jobber for rosters, QBO for billing	3	2	2	5	58

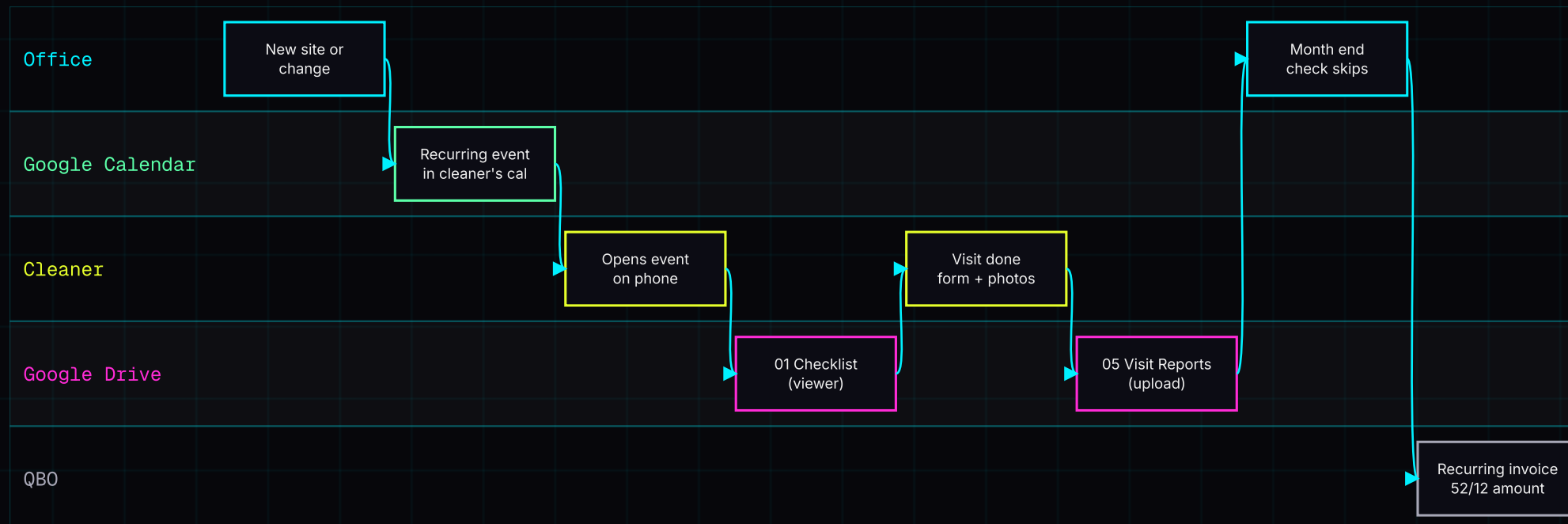
Why C

The billing errors exist today, whatever happens to Jobber. Fixing them first means the move carries clean rates into QBO. Waves keep the risk to one region at a time, and gates make "ready" a number, not an opinion.

What it changes for cleaners

Their roster arrives as a Google Calendar they already have on their phone, with the checklist one tap away in Drive. The office reads out or texts access codes; they are never in the event.

One place for each job: the calendar for when, Drive for how, QBO for billing



Calendar

One calendar per cleaner, shared with the office. Each job is a recurring event with the site address, the checklist link and the notes with codes removed.

Drive

A shared drive: client, then site, then five folders. Cleaners see the checklist and can upload reports; site access and billing are office-only.

QBO

One recurring template per site and service at the agreed monthly amount. Skipped visits are credited at month end from the visit forms.

Every QBO customer, site and template has a home in Jobber

Customers (168 parents)

RULE	MATCHED
E1 same email, name 0.85+	5
F1 name 0.93+, clear winner	4
N1 same name	159

Templates (289)

RULE	TEMPLATES
Not in Jobber	6
Property + service	265
Property + service + amount	18

Rules run in order: same normalised name; same email and name 0.85+; name 0.93+ with a clear winner. Three pairs of look-alike businesses (different clients, near-identical names) stay apart. Where an ended job and its replacement share an address, the template goes to the job whose monthly amount it equals.

Duplicate customers to merge in QBO

QBO RECORD	JOBBER CLIENT	RULE	ACTION
Northside Engineering - Accounts	Northside Engineering Pty Ltd	F1 name 0.93+	Merge into Q0017
Hillcrest Accountants - Accounts	Hillcrest Accountants	E1 same email	Merge into Q0077
Kingsley Fitness	Kingsley Fitness Pty Ltd	E1 same email	Merge into Q0092
Fairfield Engineerng	Fairfield Engineering Pty Ltd	F1 name 0.93+	Merge into Q0044
Westend Poiatry - Accounts	Westend Podiatry	E1 same email	Merge into Q0033
Banksia Logistics - Accounts	Banksia Logistics	N1 same name	Merge into Q0086
Elm Street Lgistics - Accounts	Elm Street Logistics Pty Ltd	F1 name 0.93+	Merge into Q0123

195 of 363 jobs move as is; 157 items need one action each

STATUS	ROWS	MONTHLY DIFF.	ACTION	OWNER
Matched	195	0.00	Move as is	Office
Billed in Jobber	62	(52,180.34)	Create QBO template at the Jobber rate; switch off Jobber invoicing at cutover	Bookkeeper
Double-billing risk	15	0.00	Stop Jobber auto-invoicing now; credit the duplicate invoices	Bookkeeper
Duplicate in QBO	8	4,930.00	Make the newer template inactive; credit the second invoice each month	Bookkeeper
Not billed	9	(5,703.67)	Create QBO template; raise catch-up invoices for Aug-Oct	Bookkeeper
Basis mismatch	19	(1,483.02)	Change template to the 52/12 monthly amount; bill the shortfall	Bookkeeper
Rate mismatch	31	(840.00)	Update template to the current agreed rate (1 Jul 2026 rise); bill the shortfall	Bookkeeper
Inactive in Jobber - confirm	7	5,095.99	Confirm with the client whether the work ended; if so make the template inactive and credit	Owner
Archived, no template	17	0.00	Nothing to move; keep in the Jobber archive export	Office
Missing in Jobber	6	465.00	Confirm what it is (supply-only charge); keep the template, add a note	Owner

Status is a formula in the workbook, worked out in a fixed order (ended work first, then duplicates, then who bills, then basis, then rate), and agrees with the engine on every row. "Billed in Jobber" shows a negative difference because there is no QBO template yet: it is not lost money until Jobber is switched off.

09 • RESULTS • THREE-MONTH BILLING CHECK

\$73,774.99 over-billed and \$24,094.07 under-billed, August to October

\$771,931

should have been billed

\$199,249

billed in Jobber

\$622,363

billed in QBO

\$42,156

billed twice

Largest over-billed

JOB	CLIENT	STATUS	GAP
J1264	Elm Street Logistics Pty Ltd	Double-billing risk	6,305.01
J1097	Kingsley Insurance Brokers	Double-billing risk	5,148.00
J1081	Clearwater Property Group Pty Ltd	Duplicate in QBO	5,070.00
J1232	Southgate Pathology	Double-billing risk	5,018.01
J1215	Northside Learning Centre	Double-billing risk	4,485.00
J1172	Hillcrest Accountants	Double-billing risk	4,029.99
J1346	Sunbury Architects Pty Ltd	Inactive in Jobber - confirm	3,822.00
J1143	Banksia Accountants	Double-billing risk	3,276.00

Largest under-billed

JOB	CLIENT	STATUS	GAP
J1077	Wattle Grove Dental	Not billed	(4,875.00)
J1059	Sunbury Accountants Pty Ltd	Not billed	(3,510.00)
J1035	Ashwood Early Learning	Not billed	(2,730.00)
J1207	Bayview Vet Clinic	Not billed	(2,418.00)
J1165	Wattle Grove Fitness	Not billed	(1,638.00)
J1212	Westend Physiotherapy	Basis mismatch	(830.01)
J1163	Clearwater Logistics	Not billed	(806.01)
J1107	Oakwood Logistics	Basis mismatch	(609.99)

Should-bill follows the written policy, not the visits that happened: skipped visits are a credit decision for the office, listed in Jobber Visits.

11 clashes and 4 cleaners over their hours

Roster clashes (same cleaner, same day, overlapping)

JOB A	JOB B	CLEANER	DAY	A	B	OVERLAP MIN
J1171	J1245	CL12	MO	21:30-23:30	21:00-22:30	60
J1061	J1301	CL29	TH	08:00-10:00	07:30-08:30	30
J1093	J1186	CL03	TH	17:30-19:30	18:00-20:00	90
J1115	J1328	CL15	WE	20:30-21:30	20:00-21:30	60
J1128	J1158	CL14	MO	07:00-07:30	07:00-08:00	30
J1172	J1212	CL14	MO	20:30-21:30	20:00-22:30	60
J1051	J1069	CL24	MO	05:30-06:30	06:00-07:00	30
J1221	J1254	CL35	TU	20:00-21:30	19:30-20:30	30
J1057	J1162	CL44	WE	06:00-08:00	05:30-07:30	90
J1200	J1281	CL20	FR	07:30-08:30	07:00-08:00	30
J1263	J1317	CL46	TU	06:00-07:30	05:30-07:30	90

Highest load against contract

CLEANER	NAME	REGION	CONTRACTED	ROSTERED
CL38	Rosa F.	East	20	27.5
CL14	Nikos A.	East	25	30.0
CL27	Grace F.	South	20	22.0
CL46	Farid L.	East	20	20.5
CL17	Quynh A.	North	20	19.5
CL24	Dinh F.	West	20	19.5

Jobber let these through because each visit was booked on its own. In Google Calendar they would sit side by side on one phone; each is fixed before its wave by moving one job or its start time. Gate G5 counts what is left.

339 recurring events, 66 codes kept out of them

One event, as built

FIELD	VALUE
Calendar	CL43 Carmen L. roster
Title	Office clean - Oakwood Vet Clinic (Bentleigh)
First date	2027-01-26
Time	05:30-07:30
Repeat	FREQ=WEEKLY;BYDAY=TU
Location	218 High Road, Bentleigh VIC
Description	Office clean. Checklist: Clients/Oakwood Vet Clinic/Main office - Bentleigh/01 Scope & Checklist. Notes: Code for roller door: [in 02 Site Access]; Bins out on Tuesday night. Access details: Clients/Oakwood Vet Clinic/Main office - Bentleigh/02 Site Access (office will share).

How codes are handled

- A pattern finds codes after words like alarm, code, key safe, lockbox and keypad, and leaves phone numbers and bin days alone (0 false flags in 252 notes).
- The code is replaced with a pointer to *02 Site Access*, an office-only folder.
- Every event is searched again before import: 0 contain a code (gate G6).
- Each cleaner gets an .ics file built from the workbook, so the import is the same file the checks ran on.
- Weekly jobs repeat by day, 4-weekly jobs keep their Jobber cycle, monthly jobs repeat on the first weekday of the month.

1,670 folders, shared by role, not by person

Structure

Clients/
 Oakwood Vet Clinic/
 Main office - Bentleigh/
 01 Scope & Checklist
 02 Site Access
 03 Agreements
 04 Billing
 05 Visit Reports

158 client folders, 252 site folders and five folders under each site. Sharing is by group (cleaners, office, bookkeeper), so a new starter gets access by joining a group.

FOLDER	CLEANERS	OFFICE	BOOKKEEPER	WHY
01 Scope & Checklist	Viewer	Editor	-	Checklist the cleaner opens from the calendar event
02 Site Access	-	Editor	-	Codes and keys; office reads them out or texts them, never in the calendar
03 Agreements	-	Editor	Viewer	Signed agreement and current rate letter
04 Billing	-	Editor	Editor	QBO template notes, credit notes, rate history
05 Visit Reports	Contributor (form uploads)	Editor	Viewer	Photos and sign-off uploaded from the visit form

The pilot passes all six gates; each wave waits for its own

WAVE	GO-LIVE	JOB	G1 BILLED TWICE	G2 DUP. TEMPLATE	G3 BILLED ONCE	G4 RATES	G5 CLASHES	G6 CODES
Pilot	2026-12-07	8	0	0	0	0	0	0
Wave 1 North	2027-01-11	63	4	1	7	9	1	0
Wave 2 East	2027-01-18	102	6	3	3	15	3	0
Wave 3 South	2027-01-25	87	2	2	4	18	3	0
Wave 4 West	2027-02-01	79	3	2	2	8	4	0

How a gate works

Each gate is a count over the Rate Reconciliation, Roster Clashes and Calendar Build tabs for that wave's jobs. When the bookkeeper fixes a template, the count drops; the wave goes live when all six read 0.

The pilot

2 North cleaners (CL09, CL33) with 8 jobs and no open items. They run on Google Calendar from 2026-12-07 while Jobber stays live for everyone else, so problems show up with 8 jobs, not 339.

14 · CONTROLS

32 of 32 controls pass

CONTROL	ACTUAL	CONTROL	ACTUAL
Rate Reconciliation job rows = Jobber jobs	363 PASS	Archived jobs: should bill	0 PASS
Active templates on Rate Reconciliation = active QBO templates	289 PASS	Roster clashes where Jobber shows a different cleaner	0 PASS
Formula status = engine status (rows that differ)	0 PASS	Calendar events marked as clashing = 2 x clashes	22 PASS
Rows with no next action	0 PASS	Calendar events = active jobs	339 PASS
Actions tab rows = Rate Reconciliation rows	369 PASS	Codes found = codes moved to 02 Site Access	66 PASS
QBO parents with no Jobber client	0 PASS	Calendar events with an access code in the text	0 PASS
QBO parents in Customer Match = parents in QBO	168 PASS	Drive folders = clients + 6 x locations	1,670 PASS
QBO sub-customers with no Jobber property	0 PASS	Active jobs with no wave	0 PASS
Templates pointing at a job that does not exist	0 PASS	Active jobs across waves = active jobs	339 PASS
Jobber invoices total = Billing Check Jobber column	199,249.04 PASS	Gate open items: formula = engine (cells that differ)	0 PASS
QBO invoices total = Billing Check QBO column	622,362.98 PASS	Pilot gates passed	6 PASS
Should-bill (weekly + monthly active jobs) = 3 x monthly basis	737,036.10 PASS	Rostered hours = active jobs' weekly hours	911.88 PASS
Gap total = billed (both systems) - should bill	49,680.92 PASS	Rostered hours: workbook = engine (cleaners that differ)	0 PASS
Billing Check gap = engine gap (rows that differ)	0 PASS	Exceptions: billing rows = rows needing a fix	157 PASS
Double-billed jobs: over-billing = their QBO billing	42,156.02 PASS	Exceptions: roster rows = clashes	11 PASS
Not-billed jobs: anything billed	0 PASS	Engine regression: job status disagreements	0 PASS

12 of 12 tests pass

TEST	METHOD	TESTED	EXPECTED	ACTUAL	
Job status vs answer key	engine.py reconciles every job; compared with truth_jobs	363	363	363	PASS
QBO customers matched to the right client	Parents and sub-customers vs truth_customers (look-alike names included)	168	168	168	PASS
Wrong-client matches	A customer linked to a different business	168	0	0	PASS
Templates matched to the right job	Property + service, amount where two jobs share an address	289	289	289	PASS
Access codes found	Seeded codes in property notes	66	66	66	PASS
Access code false flags	Notes flagged that hold no code (phone numbers, bin days)	252	0	0	PASS
Roster clashes found	Seeded overlapping visits	11	11	11	PASS
Extra clashes reported	Clashes that are not real	11	0	0	PASS
Billing check vs answer key	Should-bill and Jobber billing per job-month vs truth_billing	1,017	1017	1,017	PASS
Codes leaked into calendar text	Search every event description for a code	339	0	0	PASS
Archived jobs not on any calendar	Archived jobs found in Calendar Build	24	0	0	PASS
Pilot cleaners have no open item	Open items on Pilot gates	6	0	0	PASS

The answer key comes from the data generator: the true status of each job, the true client behind each QBO record, the seeded codes and clashes, and what each job should have been billed each month.

16 · CUTOVER PLAN AND ROLES

Billing fixed in December, roster moved in January

WHEN	WHAT	TASK	BOOKKEEPER	OWNER	OFFICE	CLEANERS
Now - 30 Nov	Stop Jobber invoicing on double-billed sites; credit duplicates; owner confirms ended jobs; merge QBO customers	Credits and template fixes	R	A	C	I
1 - 6 Dec	Fix basis and rate templates; create templates for Jobber-billed jobs (inactive until each wave)	Confirm ended jobs with clients	C	R/A	I	I
		Roster clashes	I	A	R	C
2026-12-07	Pilot: 2 cleaners on Google Calendar and Drive; daily check with the office	Calendar and Drive build	C	A	R	I
		Release a wave	C	A	R	I
Jan 2027	Waves 1-4 weekly, each after its gates PASS; Jobber invoicing off per wave					
By 12 Feb 2027	Jobber read-only; archive export to Drive; cancel the subscription					

What could go wrong, and the routine that catches it

RISK	LIKELIHOOD	HOW THE BUILD HANDLES IT	WHEN	STEP
A site is billed twice during the wave week	Med	Template stays inactive until Jobber invoicing is off for that wave (G1)	Daily	Office checks calendar changes and visit forms
Cleaner misses a changed visit	Med	Changes only in Google Calendar after the wave; office sends a weekly summary	Weekly	Clash check across cleaners' calendars
Code shared in an event by hand later	Low	Monthly search of all events for the code pattern	Month end	Credits for skipped visits; QBO recurring run; billing check against the template list
Former cleaner keeps Drive access	Low	Access by group; leaver checklist removes the group	Quarter	Rate review; Drive access review
Skipped visits billed in full	Med	Month-end credit from visit forms before QBO runs		

18 · HOW THIS APPLIES TO YOUR BUSINESS, AND THE FILES

Using this on your own move

If you are leaving a field service app, or billing from two places, the same steps apply:

- I'd profile both systems first and agree the billing policy in writing.
- Matching rules are tuned to how your team keyed names and addresses.
- Waves follow your regions, crews or service lines; the gates stay the same.

This is a work sample with realistic data. It shows the method and the output; every figure comes from the sample files.

Files in the download

FILE	WHAT IT IS
Jobber-to-Google-and-QBO-Migration.xlsx	27 tabs, 16,894 formulas, 32 controls, 12 tests
results/calendar/*.ics	One calendar file per cleaner, ready to import
Migration-SOP.pdf / .docx	Step-by-step runbook for the office
engine.py	Matching, reconciliation, billing check, clashes, code removal, calendar and Drive build, gates, regression test
gen.py	Builds the sample data set
book.py / metrics.py / report.py	Build the workbook, the figures and this report
data/*.csv	Inputs as exported