LESSON 01

Start here

Cleaning Company Operations Kit | Customer training guide
OwnerOps One Learning Center | Revised October 25, 2026

1. Get your kit
After purchase, use your purchase download link. If OwnerOps One has specifically granted your account this kit, sign in at owneropsone.com/product-access and select **Download**. Signing up alone does not unlock the kit.

2. Extract the ZIP
Save the ZIP to your computer and extract/unzip it into a folder you can find again. Keep the original ZIP as a clean master copy. Do not try to work inside the compressed ZIP preview.

3. Choose your working format
For the guided workflow, open **Cleaning_Workspace.html** with a current desktop browser. Start with the **Forms** or **Setup & backups** tab. If double-click opens another app, use your computer's Open with option to choose a browser.

Format	Use it for
HTML workspace	Saved documents, branding, automatic calculations, ZIP estimates, client and schedule imports.
Excel workbook	Separate editable spreadsheet with linked estimate, invoice and job-cost calculations.
Fillable PDFs	Simple reusable forms. Type into fields and save a customer copy; these do not calculate.

Important: The HTML workspace saves on your device/browser, not in your OwnerOps One account. HTML, Excel and PDF files do not sync with one another. Use the same browser and file location, and download a JSON backup after every session.

Your first session

Set up branding (page 2), add/import clients (pages 2-3), create an estimate (pages 5-6), then produce an invoice (page 7). Calendar imports are on page 4. Backups and troubleshooting are on page 10.

LESSON 02

Set up your business & clients

Do this once before creating customer-facing documents.

1. Open Setup & backups
Enter your **Business name**, email, phone, address, website and tagline. Include only details you want customers to see.

2. Add your visual branding
Choose **Document accent color**. Use **Business logo** to select a PNG or JPEG no larger than 2 MB. Use **Remove logo** if you want to replace or omit it.

3. Save and check
Select **Save business details**. Open **Forms** and check the document header. Use **Print / Save PDF** to inspect the customer output before sending it.

4. Add a client
Open **Clients**. Enter a client name, email, phone, service address and useful notes. A name is required. Give each customer a stable **Client ID**, such as C001, if you will import their appointments.

5. Save the client
Select **Save client**. Check that the client appears in the directory. Use the row's **Edit** button to correct it; keep its existing Client ID so scheduled visits remain linked.

6. Use the client on a form
Open **Forms**, choose a form, then choose the client. Contact details fill in automatically. Verify the address and contact details for this particular job.

Check before switching: Select **Save document** before changing the form or client. Existing saved documents are snapshots; review their contact information after you change a client record.

Branding by format

The HTML workspace supports your logo, accent color and business contact details on printed documents. The workbook uses your editable business details. The delivered fillable PDFs have an editable business-name header; their design is fixed and they do not have a logo-upload control.

LESSON 03

Import an existing client list

Use a CSV export from your current system. Work with a copy of your export, and keep the original.

1. Prepare your CSV
Use **Import_Templates/clients_template.csv** as a reference. Keep a header row. Supported fields are **id, name, email, phone, address, notes**. The name field is required. Keep IDs stable and unique.

2. Back up first
In **Setup & backups**, select **Download backup JSON** before adding a large batch. Importing does not overwrite existing records.

3. Choose the import
Open **Import**. Set **Import type** to **Clients CSV**, then choose your file. Keep the file smaller than 10 MB.

4. Map your columns
For each destination field, select the matching column from your CSV. For example, map Customer Name to **name**, Customer Number to **id**, and Service Address to **address**. Choose Not mapped for fields you do not have.

5. Preview and correct
Select **Preview import**. Review the valid-record count, warnings and sample rows. Missing names and duplicates are skipped. The preview shows up to the first 100 valid rows; the count may be larger.

6. Commit and verify
Select **Import valid rows**. Open **Clients** and check several records, including addresses and IDs. Download a new JSON backup after the import.

Duplicates: The importer skips an existing ID or matching email. When email is missing, it checks name plus address. Two clients sharing one email may be treated as duplicates; review warnings and add distinct records manually if appropriate.

If the preview is wrong

Do not import yet. Correct the source CSV or column mappings, then select **Preview import** again. A CSV needs a header and at least one data row. Quoted commas and multiline notes are supported. Keep sensitive entry codes out of documents you share.

LESSON 04

Bring in your schedule

Import clients first so appointment client IDs can match the directory. These are snapshot imports, not a connected calendar service.

1. Prepare a schedule CSV
Use **Import_Templates/schedule_template.csv**. Supported columns: **id, title, clientId, start, end, status, location, notes**. Title, start and end are required. End must be after start.

2. Use unambiguous dates
Use ISO date-times, such as **2026-11-03T09:00** and **2026-11-03T11:00** for local times. You may supply seconds and an explicit UTC offset. Avoid 11/03/26 or other slash dates. Check your computer's time zone before importing.

3. Import and map
Open **Import**, choose **Schedule CSV**, select the file, and map the columns. Match **clientId** to the exact saved Client ID. Select **Preview import**, review warnings, then **Import valid rows**.

4. Check the schedule
Open **Schedule**. Verify the first few start/end times, locations and client links. An unknown client ID leaves the appointment unassigned. Use **Edit** to select the right client and save the appointment.

Importing an ICS calendar file instead

Choose **Calendar ICS** in Import, select the file, then preview and import valid rows. Only individual timed UTC or floating-local events are supported. Recurring events, exceptions, all-day events, timezone-ID (TZID) entries and missing-end events are skipped with warnings. For those, export individual occurrences as a schedule CSV.

Add a visit or export the calendar

In **Schedule**, enter a visit title, select a client, set local start/end, status and location, then select **Save appointment**. Selecting a client can fill the location; check it. Use **Export schedule CSV** or **Export calendar ICS** for a snapshot to import elsewhere.

No automatic Google/Outlook sync, invitations, messages or reminders are sent. ICS imports are not automatically linked to clients. Review every import warning and back up after the import.

LESSON 05

Build a ZIP-based estimate

Use this tool as a residential pricing starting point, then inspect the job and adjust your quote.

1. Choose the market
Open **ZIP estimate**. Enter a five-digit US ZIP and select **Look up ZIP**. Confirm the returned location and region. If offline or lookup fails, choose the region manually.

2. Choose the service
Select **Regular**, **Deep** or **Move-out**. Enter the area to clean and review the low/high square-foot price assumptions.

3. Adjust your operating assumptions
Review productivity, condition multiplier, hourly wage, labor burden, supplies, travel, overhead, target margin, labor share and minimum charge. Use your real job conditions and costs. Enter percentage inputs as shown by each field label.

4. Review the outputs
Compare the modeled price range, estimated labor hours, cost floor and suggested price. The suggested price uses the greatest of your minimum charge, the cost floor and the modeled range midpoint. All amounts are before tax.

5. Move the price into a form
Select **Use suggested price in estimate**. In **Forms**, check the client, service scope and amount; add dates, exclusions and any customer discount. Save the estimate before switching away.

This is not a local quote survey. ZIP selects a region; the adjustment uses state employee wages as a proxy. The tool does not measure competitors' current prices in that ZIP and is not designed as a commercial-cleaning rate guide.

Where the baseline comes from

The workspace shows its sources under **Sources and calculation**: HomeGuide national residential price ranges (article April 29, 2024, checked October 25, 2026), BLS May 2025 wages for occupation 37-2012 and Zippopotam.us for ZIP lookup. The included Market_Sources.txt provides references. Only the ZIP is sent for lookup.

Treat default productivity, labor share, overhead and margin as editable assumptions. They are not measured local statistics. A target margin does not guarantee the profit you will earn.

LESSON 06

Prepare an estimate & discount

Use the HTML workspace for automatic totals and a clear customer-facing price.

1. Create the estimate
Open **Forms**, choose **Cleaning Estimate** and choose the client. Enter a unique **Document ID**, record date and service address.

2. Describe the job
Fill in **Service scope / approved services**, dates/frequency, exclusions and the valid-until date. Be specific about rooms, tasks and work that is not included.

3. Enter service charges
For each service line, enter a description, quantity and rate. For a flat-price job, use quantity 1 and the whole service price as the rate. Check which lines are taxable and enter the applicable tax rate; the kit does not determine taxability for you.

4. Show the customer a discount
Enter a dollar value in **Discount amount ($)** and explain it in **Discount reason / promotion**, such as First-service offer. To offer a percentage, calculate its dollar value first: 10% of $250 is $25.

5. Review and save
Check Subtotal, Discount applied, Tax, Total and Balance / credit. Leave payments received at zero unless you have actually received money. Select **Save document**.

6. Make a customer copy
Select **Print / Save PDF**. Choose your browser's Save as PDF destination. Check every page, branding and totals in print preview; save with a recognizable filename before sending.

Illustrative example (all lines not taxable)	Amount
Service subtotal	$250.00
Discount: first-service offer	-$25.00
Total before tax	$225.00

The discount is capped at the subtotal. Where tax is entered, it applies to taxable lines after the proportional discount. The printed PDF is a static customer copy; retain the editable saved document and JSON backup.

LESSON 07

Invoice, record payment & review costs

Copy an approved estimate to avoid retyping, then record what actually happened.

1. Open the saved estimate
In **Forms**, use **Saved documents** to open the correct Cleaning Estimate. Confirm the client and approved scope before continuing.

2. Create the invoice
Select **Copy estimate to invoice**. The estimate is saved and an independent Cleaning Invoice is created. Enter a new invoice Document ID, issue date and due date. Review copied scope, charges, discount and tax.

3. Save the invoice
Select **Save document**, then **Print / Save PDF** for the customer. Later edits to the estimate do not update this invoice. Correct the invoice itself when needed.

4. Record a payment
After receiving money, reopen the invoice and enter the cumulative amount in **Payments received ($)**. Save the document. The balance updates automatically; a negative balance represents a customer credit. This field records a payment, it does not collect one.

5. Issue a receipt
Select **Payment Receipt**, choose the client and record the actual payment and invoice reference. Save and print a copy. Receipt fields are manual; verify the amount against your payment record.

6. Review actual job costs
Select **Job Cost Review**. Enter revenue excluding tax, total paid crew hours, hourly labor cost, supplies, travel and other direct costs. For example, two people working three hours equals six total crew hours.

Cost example: Revenue $225; 6 crew hours at $20 = $120 labor; supplies $15; travel $10; other $0. Direct costs = $145. Contribution before overhead = $80, or about 35.6% of revenue. This is not final net profit.

Document the reason for any quoted-versus-actual variance and your next pricing or process action. If staff have different labor rates, use the workbook's individual labor rows or an accurate weighted rate. Save and back up after recording payments and costs.

LESSON 08

Choose the right form

Use a consistent document ID and client/job reference so each record can be matched to the visit.

Form	When to use it
Client Intake	Capture contact information, service address, preferences and initial needs.
Site Assessment	Record site conditions and scope before quoting.
Cleaning Estimate	Describe proposed work, charges, dates, exclusions and discount.
Room Cleaning Checklist	Track room-by-room tasks during a visit.
Recurring Service Plan	Document agreed frequency and repeat tasks; schedule individual visits separately.
Crew Job Sheet	Give the crew the visit details, task scope and handoff notes.
Supply and Equipment Log	Record supplies or equipment used and items to replenish or maintain.
Job Cost Review	Compare revenue with actual labor and direct costs.
Quality Review and Rework	Record quality checks, issues and follow-up work.
Cleaning Invoice	Request payment for completed or agreed services.
Payment Receipt	Acknowledge an actual payment with its reference.
Visit Reschedule and Handoff	Document a changed visit and who needs the updated details.

Routine: Choose the form and client, enter the visit details, select **Save document**, and print a customer/crew copy when useful. Use **Save as new** to create a separate record from a prior one, then change its Document ID, dates and job details.

These are operational records. Saving a recurring plan does not create repeating calendar events. Saving a handoff does not notify the crew; share the completed copy through your normal communication method.

LESSON 09

Use Excel or fillable PDFs

These are alternative working formats. Changes here do not appear in the HTML workspace.

Excel workbook: Cleaning_Automation_Workbook.xlsx

1. Keep a master copy
Open the workbook and Save As a working copy for the job or customer. Read the **Start** sheet, then enter business and client details on **Setup**.

2. Complete Estimate
Enter service descriptions, quantities, rates, taxable selections, discount amount and **Discount reason**. Use the amber input cells. Green formula cells calculate results; avoid overwriting them. Missing quantities or rates must be completed; zero is a valid value.

3. Review Invoice
The Invoice charges and discount reason are linked to Estimate. Enter invoice dates, ID and payments in their input cells. Unlike the HTML copy, changes to this workbook's estimate affect its linked invoice. Save a separate workbook or PDF snapshot before later revisions.

4. Complete Job Costs
Enter actual labor and other direct costs. Review revenue, contribution and margin. The **Clients** and **Schedule** sheets provide rows for pasted records; use the HTML workspace for guided CSV mapping and ICS imports.

5. Save and print
Save the workbook, inspect the totals and choose the intended sheet or print selection. Check print preview for extra columns or pages. Export a PDF if you need a static customer copy. No macros are required.

Fillable PDF forms

Open the combined **OwnerOpsOne_Cleaning_12_Forms.pdf** or a form in **Individual_Forms** using a PDF reader that supports form fields. Enter your business name in the header and fill the job details. Save As a new file for each customer or visit, then close and reopen it to confirm the values were saved.

> Fillable PDFs do not calculate, import clients, upload logos or sync with other files. Their layout is fixed. If fields do not work in a browser/mobile preview, open the downloaded PDF in a full PDF reader. Check all manual totals before sharing.

LESSON 10

Back up, restore & solve problems

Make a backup part of every work session, especially after imports, estimates and payments.

1. Save every document
In Forms, select **Save document**. A visible draft is not a substitute for saving. Reopen it from Saved documents if you need to confirm it exists.

2. Download a complete backup
Open **Setup & backups** and select **Download backup JSON**. Store the file in a secure folder and keep dated versions, for example cleaning-backup-2026-11-03.json. The backup contains business and customer details, appointments and saved documents.

3. Move to another browser or computer
Copy the extracted kit and your latest JSON backup to the new device. Open Cleaning_Workspace.html, then use **Restore backup**. Select the JSON and read the confirmation: restore replaces that workspace's existing records, it does not merge them. Back up the destination first.

4. Verify after restore
Check business branding, a client, an appointment and a saved invoice. Save a new backup after confirming everything is present.

Problem	What to do
No products on your account	Use your purchase download link, or confirm the owner granted this exact product to this account. Signing up alone gives no product access.
Changes disappeared	Use the same browser/profile and original file location. Restore your latest JSON backup. Browser storage can be cleared or unavailable.
Import added fewer rows	Read warnings: duplicates, missing required fields and unsupported calendar entries are skipped. Correct and preview again.
Appointment time is wrong	Check your computer time zone and CSV offset. Review imported times before using the schedule.
Logo or print layout is wrong	Use PNG/JPEG under 2 MB, save business details, then check print preview and browser scaling.
ZIP lookup failed	Check internet access or select the region manually. Recheck every estimate assumption.

Need help? Email support@owneropsone.com with the format used, step and error message. Avoid sending full client lists or backups unless support specifically requests them through an appropriate channel.