

Carpet cleaning orders

STANDARD OPERATING PROCEDURE

Company: ClearCare Carpet Cleaning (fictional)

Purpose: Complete every order with the correct carpets, agreed service, payment and handover recorded.

Owner: Operations Manager | **Version:** 3.1 | **Date:** 3 October 2026

Start: A customer calls, messages, orders online or visits.

Sample rules for shiran.io: the size limit and payment terms are illustrative. Cleaning techniques belong in separate, material-specific work instructions.

1. Book the job - Customer Service

Create one job number. Record name, phone, address, carpet count, estimated sizes, material/stains if known and preferred date. Request photos if available.

Check team/workshop availability; assign a technician and confirm the visit. Give a provisional quote and route; explain that inspection confirms the final price and timing.

Missing information or unclear access: resolve before dispatch.

2. Inspect and agree - Technician

Count and measure each carpet; assign an item number. Record condition and existing damage; take photos with permission, or written notes if declined.

Agree price, route, timing, payment terms and stain-removal limits with the customer before work or collection. Save their written or digital confirmation. Do not promise removal of every stain.

Choose a route **for each carpet**:

- **A - Home:** up to 4 m², suitable material, safe workspace and suitable equipment.
- **B - Workshop:** over 4 m², removable and suitable for workshop cleaning.
- **Fixed, delicate, unknown material or unsuitable conditions:** stop; the manager agrees an alternative with the customer before proceeding.

Customer declines: record cancellation; do not clean or collect. Any visit fee must have been agreed beforehand.

Route A - Clean at the customer's home

3A. Clean at home - Technician

Protect the area and use the approved method. Check the result against the agreed service with the customer; explain drying and use precautions.

Problem or damage: stop where necessary, notify the manager and record the agreed next action.

4A. Invoice and get paid - Technician

Invoice the home-cleaning portion, confirm payment received and give a receipt. Confirm cash received or an electronic credit through the company's payment account; a screenshot alone is insufficient.

Complaint or payment pending: keep this portion open; contact the manager for follow-up instructions before leaving.

5A. Record completion - Customer Service

Record customer acceptance, payment and receipt. Mark the home portion complete. A mixed order stays open until every carpet is finished or returned and all payments are recorded.

Route B - Collect for the workshop

3B. Collect and label - Collection Team / Workshop

Label each carpet with job/item number, e.g. CC-0101 / C1. Agree the count and condition with the customer and save their collection confirmation. Give a receipt stating items, price and expected return date.

The Workshop matches labels/count, records arrival and keeps each label linked through cleaning, drying and packing.

Missing label, mismatch or new damage: hold affected items; notify the manager before processing.

4B. Clean, dry and check - Workshop / Supervisor

Use the approved method and dry fully. The supervisor checks the agreed cleaning is complete, the carpet is dry, there is no unexplained new damage compared with the collection record, and all items are accounted for. Record the result, reviewer and date.

Failed check: hold for suitable rework or a manager-agreed customer solution. Notify Customer Service promptly if the return date will change.

Only a recorded pass permits **Ready for payment**.

5B. Invoice and get paid - Customer Service

Notify the customer; invoice only the workshop work, excluding home work already invoiced. Keep both invoices and their payments linked to the job. Confirm cash received or an electronic credit through the company's payment account before dispatch.

Payment pending or disputed: hold dispatch; ask the manager to resolve. Additional work or charges require customer agreement before being incurred.

6B. Return and close - Delivery Team / Customer Service

Pack dry carpets. Match job/item labels and count to the delivery record; confirm appointment and recipient.

At handover, check count/condition together and obtain signed or digital confirmation.

Absent recipient: keep carpets and rebook; never leave unattended. **Wrong item:** do not hand it over; notify Customer Service. **Complaint:** keep the job open for the manager.

Close the whole job only after all carpets are finished/returned, all payments and receipts are recorded, and complaints are resolved.

Shared job record and follow-up

Keep contacts, item IDs, routes, price/approval, condition notes, status per item, invoices, payments and handovers in one job record.

A held item must have a reason, named owner, next action and follow-up date. Customer Service checks due and held jobs each working day; the manager resolves overdue actions. Update customers when an agreed date changes.

Keep both documents available where orders are handled. Test a home job, a workshop job and a mixed order before use. Review after an incident or process change.