

Cleaning Customer Tracker Template Specification

Practical cleaning business template • Customize fields before use

Brand customization: This TidyOps-branded example shows a finished presentation. Replace the logo, colors, company details, and placeholders with your own brand before use.

CLEANING CUSTOMER TRACKER

Template ID: TPL-BIZ-007

Version: 1.0

Updated: September 2026

Provided by TidyOps

1. CUSTOMER DIRECTORY

Maintain one master record for each customer.

Customer ID	Customer	Status	Service	Frequency	Price	Last Service	Next Service
					\$		

Customer Status

- ☐ Active
- ☐ New
- ☐ Paused
- ☐ Seasonal
- ☐ Past Customer
- ☐ Canceled
- ☐ Do Not Schedule

2. CUSTOMER INFORMATION

Customer ID:

Customer / Company Name:

Primary Contact:

Phone:

Email:

Billing Contact:



Customer Since:

Lead Source:

Account Manager:

3. SERVICE PROPERTY

Property / Facility Name:

Service Address:

City / State / ZIP:

Property Type:

- ☐ House
- ☐ Apartment / Condo
- ☐ Vacation Rental
- ☐ Office
- ☐ Retail
- ☐ Multifamily
- ☐ Commercial Facility
- ☐ Other:

Approx. Square Footage:

Bedrooms:

Bathrooms:

4. SERVICE DETAILS

Primary Service:

Frequency:

- ☐ One-Time
- ☐ Weekly
- ☐ Every 2 Weeks
- ☐ Every 4 Weeks
- ☐ Monthly
- ☐ Custom

Current Price Per Visit: \$

Standard Crew Size:

Estimated Labor Hours:

Preferred Service Day:

Preferred Arrival Window:

5. CUSTOMER PREFERENCES

Record operational preferences such as:

- ☐ Customer Priorities
- ☐ Preferred Products
- ☐ Products to Avoid
- ☐ Special Surfaces
- ☐ Pets
- ☐ Parking Instructions
- ☐ Restricted Areas
- ☐ Communication Preference
- ☐ Other:

Notes

6. ACCESS INFORMATION

Access Method:

- ☐ Customer Present
- ☐ Key
- ☐ Lockbox
- ☐ Keypad
- ☐ Smart Lock
- ☐ Front Desk / Security
- ☐ Property Manager
- ☐ Other

Access Notes

Do not use a general customer spreadsheet to store raw passwords, payment credentials, alarm codes, or other highly sensitive access credentials when a secure system is available.

7. SERVICE HISTORY

Date	Job #	Service	Price	Crew	Status	Quality Score
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\$	Complete	%
\$	Complete	%

This should feed customer lifetime metrics automatically.

8. CUSTOMER REVENUE

For each customer calculate:

Total Completed Jobs:

Lifetime Revenue: \$

Average Job Value: \$

Revenue Last 30 Days: \$

Revenue Last 90 Days: \$

Revenue This Year: \$

9. RECURRING CUSTOMER VALUE

For recurring customers:

Price Per Visit: \$

Estimated Visits Per Year:

Estimated Annual Recurring Revenue

\$

Example frequency assumptions should be editable rather than hard-coded:

Weekly → approximately 52 visits/year

Every 2 Weeks → approximately 26

Every 4 Weeks → approximately 13

Monthly → approximately 12

10. CUSTOMER PROFITABILITY

Where job-costing data is available:

Lifetime Revenue: \$

Estimated / Actual Cost: \$

Contribution Profit: \$

Contribution Margin: %

Revenue Per Labor Hour: \$

This helps distinguish high-revenue customers from genuinely valuable customers.

11. CUSTOMER HEALTH

Create a simple health indicator.

Healthy

- Active recurring service
- Payments current
- Good quality history
- No unresolved issues

Review

- Recent complaint
- Low profitability
- Repeated rescheduling
- Failed payment
- Declining frequency

At Risk

- Multiple complaints
- Repeated recleans
- Cancellation request
- Long service gap
- Significant unresolved issue

Customer Health:

☐ Healthy

☐ Review

☐ At Risk

12. CUSTOMER FOLLOW-UPS

Due Date	Customer	Follow-Up Type	Assigned To	Status

Follow-Up Types

- ☐ First-Service Check-In
- ☐ Quality Follow-Up
- ☐ Complaint Follow-Up
- ☐ Payment Follow-Up
- ☐ Renewal
- ☐ Rebooking
- ☐ Review Request
- ☐ Upsell / Add-On

☐ Other

13. FIRST-SERVICE FOLLOW-UP

After a customer's first service:

- ☐ Service completed
- ☐ Quality reviewed
- ☐ Customer contacted if appropriate
- ☐ Feedback recorded
- ☐ Problems resolved
- ☐ Recurring schedule confirmed
- ☐ Review request considered

14. QUALITY HISTORY

Track:

Inspections:

Average Inspection Score: %

Recleans:

Complaints:

Damage / Incident Reports:

Last Quality Issue:

15. CUSTOMER ISSUE LOG

Date	Issue	Job #	Severity	Resolution	Closed
					☐

Issue Type

- ☐ Missed Task
- ☐ Quality Complaint
- ☐ Late Arrival
- ☐ Access Problem
- ☐ Billing
- ☐ Damage
- ☐ Cleaner Concern
- ☐ Scheduling

☐ Other

16. PAYMENT STATUS

Track operational payment status without storing sensitive card data.

Payment Terms:

Preferred Payment Method:

Account Status:

☐ Current

☐ Payment Due

☐ Past Due

☐ Payment Failed

☐ Billing Hold

Outstanding Balance: \$

Last Payment Date:

17. PRICE HISTORY

Effective Date	Service	Old Price	New Price	Reason
		\$	\$	

This is particularly useful for recurring customers.

18. PRICE REVIEW

Current Price: \$

Current Estimated Cost: \$

Current Margin: %

Last Price Review:

Next Price Review:

Action:

☐ No Change

☐ Review Needed

☐ Price Increase Recommended

19. ADD-ON OPPORTUNITIES

Potential services:



- ☐ Deep Cleaning Upgrade
- ☐ Inside Refrigerator
- ☐ Inside Oven
- ☐ Interior Windows
- ☐ Cabinets
- ☐ Carpet Cleaning
- ☐ Floor Care
- ☐ Vacation / Event Cleaning
- ☐ Additional Property
- ☐ Other

Next Opportunity:

20. REVIEW TRACKING

Review Requested:

- ☐ No
- ☐ Yes

Request Date:

Review Received:

- ☐ No
- ☐ Yes

Rating:

Do not condition incentives on positive reviews where prohibited by platform rules or applicable law.

21. CUSTOMER REFERRALS

Referral Requested:

- ☐ No
- ☐ Yes

Customers Referred:

Referral Revenue: \$

Referral Reward:

22. CANCELLATION TRACKING

When recurring service ends:

Cancellation Date:

Final Service Date:

Cancellation Reason:

- ☐ Price
- ☐ Quality
- ☐ Moving
- ☐ Schedule
- ☐ Competitor
- ☐ No Longer Needed
- ☐ Financial
- ☐ Company Termination
- ☐ Other

Save Attempted:

- ☐ No
- ☐ Yes

Outcome:

23. CUSTOMER RETENTION

For a selected period:

Customers at Start:

Customers Lost:

Retention Rate

%

Churn Rate

%

24. CUSTOMER TENURE

Automatically calculate:

Customer Since:

Months as Customer:

Years as Customer:

Long-tenure recurring customers should be easy to identify.

25. CUSTOMER SEGMENT

Optional segmentation:

- ☐ New Customer
 - ☐ Recurring Residential
 - ☐ High-Value Residential
 - ☐ Commercial
 - ☐ Vacation Rental
 - ☐ Property Manager
 - ☐ Realtor / Partner
 - ☐ At Risk
 - ☐ Past Customer
-

26. CUSTOMER DASHBOARD

The workbook should show:

CUSTOMERS

Total Customers:

Active Customers:

Recurring Customers:

New This Month:

Canceled This Month:

VALUE

Revenue This Month: \$

Recurring Annual Value: \$

Average Customer Revenue: \$

RETENTION

Retention Rate: %

Churn Rate: %

QUALITY

Average Quality Score: %

Reclean Rate: %

Customers At Risk:

27. CUSTOMER VALUE RANKING

Customer	Annual Revenue	Lifetime Revenue	Margin	Health
Customer A	\$	\$	%	Healthy
Customer B	\$	\$	%	Review

This can identify accounts deserving proactive retention attention.

28. CUSTOMER FOLLOW-UP DASHBOARD

Highlight:

Red — Overdue customer follow-up

Orange — At-risk customer

Yellow — Price review due

Green — Healthy active customer

Additional alerts:

☐ Failed Payment

☐ Complaint Open

☐ Reclean Required

☐ Service Gap

☐ Review Request Due

☐ Renewal Due

29. MONTHLY CUSTOMER TREND

Month	Active	New	Lost	Recurring	Revenue	Retention
Jan					\$	%
Feb					\$	%
Mar					\$	%

Continue through December.

30. CUSTOMER ACTION PLAN

Customers Needing Immediate Attention

Accounts Needing Price Review

Customers to Ask for Reviews

Customers With Add-On Opportunities

Past Customers to Re-Engage

PRIVACY & SECURITY NOTICE

Customer records may contain personal information and property-access details.

Protect customer information from unauthorized access. Avoid storing payment-card information, banking credentials, passwords, complete alarm codes, or other highly sensitive credentials in an ordinary spreadsheet.

Only collect and retain customer information needed for legitimate business purposes, and follow applicable privacy, retention, security, and communication requirements.

TEMPLATE NOTICE

This template is a general customer-management resource and is not legal, privacy, accounting, financial, or marketing advice.

Customize the fields, retention calculations, customer statuses, and follow-up processes to match your business.

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