

MooTidy User Manual

MooTidy v0.1.0-rc.3

The frozen daughter-pilot release. Last updated: 1 November 2026.

Start here

Everything you need to start running your cleaning business in MooTidy, in the order you will need it. Each step links to the full guide if you want more detail.

The MooTidy journey

Lead → Customer → Property → Service plan → Clean → Invoice → Payment

You do each step yourself. The Customer Portal, where customers can see their cleans and ask for changes, is optional, and you can switch it on later or never.

Before you start

A few things that are good to know from day one:

- **Regular cleans appear only after you generate them.** A recurring plan does not fill the Calendar by itself: use **Generate jobs** (step 7).
- **A plan's cleaner applies to cleans generated from then on.** If you change the cleaner on a plan, cleans already in the Calendar keep their cleaner; change those on each clean.
- **Check payments before you save them.** A recorded payment cannot be edited or removed yet, so check the amount and date first.
- **A completed clean becomes a draft invoice when you create one.** You review the draft, then issue it to the customer.
- **MooTidy records payments; it does not take them.** Customers pay you as they do now (for example by bank transfer), and you record it.
- **Access details ask for your password.** Key safe codes and alarm details stay hidden until you confirm it is you, and hide again after 5 minutes.
- **Close every clean.** Each clean should end up completed, skipped, cancelled or marked no access, so your Calendar, invoices and customers' history stay accurate.
- **The Customer Portal is yours to control.** It stays off until you turn it on, and nothing a customer asks for changes until you decide.
- **Extra price confirmation.** On an invoice with a Quote Required add-on, MooTidy may ask you to confirm the price of the other add-ons too. The amounts are right; just confirm them.

Your first day, step by step

1. Sign in

Go to app.mootidy.com (<https://app.mootidy.com>) and sign in with your email and password. You land on the Dashboard. The menu shows the version, **MooTidy v0.1.0-rc.3**. See Getting started.

2. Check Business Settings

Open **Business Settings** and check your **Time zone** (it decides what "today" means everywhere), your contact details, and under **Invoice and payment details** your invoice prefix, payment terms and bank details. See Business Settings.

3. Add or review your Services

Open **Services** and make sure each clean you offer is there, with its pricing (hourly, fixed or quote) and default duration. Add checklists if you want your cleaner to tick items off. See Services.

4. Add a customer

Select **Add customer** on the Dashboard or the Customers page. Only the first name is required. If someone asked about your cleaning first, add them as a lead and convert them later. See Customers and Leads.

5. Add their property

On the customer's page, under **Properties**, select **Add property**. Add the address and the notes your cleaner needs (pets, parking, products). Add access details in the separate **Sensitive access details** area. See Properties.

6. Create a recurring service plan

Under **Recurring service plans**, select **New plan**: the property, the service, how often, the start date, the usual day and time, the price and the cleaner. See Recurring service plans.

7. Generate the cleans

Open **Calendar**, select **Generate jobs**, choose the plan and how far ahead to create cleans, then **Generate**. Doing it again never creates duplicates. See From plan to cleans.

8. Assign a cleaner if needed

Cleans take the plan's cleaner. For any clean without one, open it in the Calendar and use **Assign cleaner**. The Dashboard lists cleans that need a cleaner in the next 7 days. See Calendar and scheduling.

9. Run the clean

Whoever cleans opens **My Jobs** on their phone, taps the clean, then **I've arrived** and **Start clean**. See My Jobs.

10. Complete the clean

Tick off the checklist and tap **Complete job**. If something went wrong, use **Report issue**; if nobody could get in, use **No access**.

11. Create and issue the invoice

Open the completed clean in the Calendar and, under **Billing**, select **Create invoice**. Review the draft in **Invoices**, then **Issue invoice**. The customer is emailed their invoice. See Invoices.

12. Record the payment

When the money arrives, open the invoice and select **Record payment**. Check the amount and the date before you save. See Recording payments.

That is the whole journey. From here, Your daily MooTidy routine keeps things running day to day.

Your daily MooTidy routine

A few minutes each day keeps MooTidy and your business in step. If you also do the cleaning yourself, you will use both routines.

Running the business (owner)

1. **Open the Dashboard.** It shows today at a glance. See Dashboard.
2. **Work through Needs attention.** Each clean that needs something is listed with the reason (for example **Needs a cleaner** or **Issue reported**) and a link straight to it. Overdue invoices and customer requests are listed below the cleans.
3. **Check Today's cleans.** Make sure everything for today has a cleaner and is going ahead.
4. **Look ahead. Next 7 days** shows how many cleans each day has, and how many still need a cleaner. In the Calendar, **Unassigned only** finds them all.
5. **Answer Customer Requests** (if you use the portal). Approve or reject each one, make any change yourself, then mark it applied. See Customer Requests.
6. **Close yesterday's work.** Resolve reported issues, make charge decisions on no-access visits, and make sure every past clean is completed, skipped or cancelled.
7. **Invoice completed cleans.** Open each completed clean, **Create invoice**, then issue it from **Invoices**.
8. **Record payments received.** Open the invoice and **Record payment**, checking the amount and date.

Every few weeks, use **Generate jobs** to create regular cleans further ahead.

Doing the cleans (cleaner)

1. **Open My Jobs** and look at **Today**.
2. **Open your next clean.** Read the notes, any **Today's priorities** and the checklist.
3. **Tap I've arrived** when you get there.
4. **Tap Start clean** when you begin.
5. **Work through the checklist**, ticking items as you finish.
6. **Finish the visit:**
 - **Complete job** when you are done;
 - **Report issue** if something is wrong (damage, safety, not enough time);
 - **No access** if you cannot get in.

If you need to see the key safe code or alarm details, tap **Show access details** and confirm your password. They hide again after 5 minutes. See My Jobs.

Your two-week MooTidy pilot

What we are asking

You are not being asked to test MooTidy.

Use it to run your business normally for two weeks: your customers, your cleans, your invoices and your payments.

When something feels confusing, slow, missing or wrong, write it down as it happens. A quick note in the moment is worth more than a long list remembered later.

We want evidence from real work, so we will not change MooTidy every day while you use it. At the end of the two weeks, we will sit down together, go through what you noted, and decide what MooTidy needs next.

In short: use MooTidy to run the business normally. When something gets in your way, capture it. We will review the evidence rather than changing the product every day.

How to note something

For each thing you notice, write down four things:

Keep your notes wherever is easiest for you, for example a note on your phone, and bring them to the review.

What were you trying to do?

For example: "Send Sarah her invoice for last week."

What happened?

For example: "The invoice was issued, but I wasn't sure whether Sarah had been emailed."

What did you expect?

For example: "A message saying the invoice had been emailed."

Screenshot, if useful

A photo or screenshot of the screen helps, especially for anything that looked wrong. Never include a key safe code, alarm code or password in a screenshot.

What kind of note is it?

Label each note with one of these, so we can sort them later:

Label	Use it when
Bug	Something did not work, or gave the wrong result.
Confusing	It worked, but it was hard to understand or find.
Missing	You needed something MooTidy cannot do yet.
Nice to have	An idea that would make things easier, but you managed without it.

Good to know during the pilot

- Read Start here, especially **Before you start**. It explains the few things that work differently from what you might expect.
- If a page says it couldn't load, check your connection and try again. MooTidy shows an error rather than an empty page, so a failed page is never "nothing there". See Common situations.
- If you report a problem, the version is at the bottom of the menu: **MooTidy v0.1.0-rc.3**.
- Anything urgent that stops you working with a customer: carry on the way you would without MooTidy, and note what happened.

1. Welcome to MooTidy

MooTidy runs the day-to-day work of a residential cleaning business: the people who ask about your cleaning, your customers and their homes, the regular cleans you have agreed, who is cleaning where and when, and what customers owe and have paid.

It is built for a solo cleaner or a small team, with one simple idea at its centre: every clean follows the same journey.

The MooTidy journey

Lead → Customer → Property → Service plan → Clean (job) → Invoice → Payment

Stage	What it is	What it leads to
Lead	Someone who has asked about your cleaning.	When they say yes, you convert them into a customer.
Customer	A person or household you clean for.	You add the home (or homes) you clean for them.
Property	A home you clean, with its address and the notes your cleaners need.	You set up the regular clean for that home.
Service plan	The agreed service, schedule and price for regular cleans.	You generate the plan's cleans into the Calendar.
Clean (job)	One visit on one day, with a cleaner assigned.	The cleaner arrives, cleans and completes it in My Jobs.
Invoice	What the customer owes for completed cleans.	You issue it, and the customer pays.
Payment	Money you have received.	The invoice becomes paid, and the payment counts as revenue.

You can also book a single clean without a plan (a one-off job), and you can add a customer directly without starting from a lead.

You stay in control. MooTidy has an optional customer portal where customers can see their cleans and invoices and ask for changes. It is optional: you can always do everything on the customer's behalf, and nothing a customer asks for changes until you decide.

2. Getting started

Signing in

1. Go to MooTidy and enter your **Email** and **Password**.
2. Select **Sign in**.

MooTidy may show **Loading...** for a moment while it finds your business. You then land on the page for your role:

- **Owners, managers and admins** land on the **Dashboard**.
- **Cleaners** (and contractors) who do not manage the business land on **My Jobs**.

You can still open any page your role allows from the menu.

Creating an account and setting up your business

If you are new to MooTidy:

1. Select **Sign up** and fill in **First name**, **Last name**, **Email**, **Password** (at least 6 characters) and, optionally, **Phone**.
2. MooTidy says **Account created**. Open the confirmation email and follow the link.
3. Sign in. Because you do not belong to a business yet, MooTidy shows **Let's set up your cleaning business**.
4. Enter your **Business name** and check the **URL identifier** MooTidy suggests (lowercase letters, numbers and hyphens).
5. Check **Country**, **Time zone** and **Currency**. The time zone matters: it decides what "today" means everywhere in MooTidy (see Time zones).
6. Optionally add contact and address details, the **Default travel buffer (minutes)** and **Cancellation notice (hours)**. You can change all of these later in Business Settings.
7. Save. You land on the Dashboard, which shows a short **Finish setting up** checklist until the essentials are in place.

People who already belong to a business never see this setup page.

Finding your way around

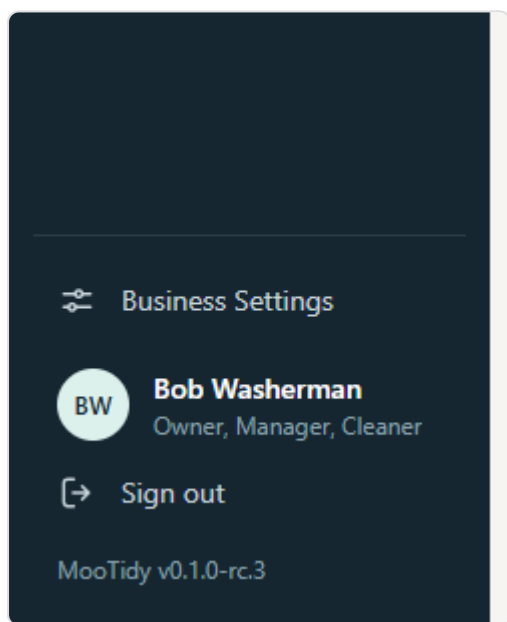
The menu on the left (or behind the menu button on a phone) is grouped:

Group	Pages
(top)	Dashboard
CRM	Leads, Customers, Customer Requests
Operations	Calendar, My Jobs
Finance	Invoices
Business	Services, Notifications
My work	My Cleaner Profile, My Availability
(bottom)	Business Settings

You only see the pages your role can use. A cleaner sees a short menu focused on their own work. My Jobs appears for anyone who cleans, including an owner who also cleans.

On a phone, tap the menu button at the top to open the menu. Choosing a page closes it again.

Version. The menu shows the MooTidy version you are using (for example "MooTidy v0.1.0-rc.3"). Owners, managers and admins can also see the version and build under **Business Settings, About MooTidy**. Quote these if you ever report a problem.



The bottom of the menu shows who is signed in and the MooTidy version.

Time zones

MooTidy works in your **business's time zone** (set in Business Settings). "Today", the days in the Calendar, the times on jobs, the default date for a payment, revenue periods and overdue invoices all follow your business's local time, including the clocks changing in spring and autumn.

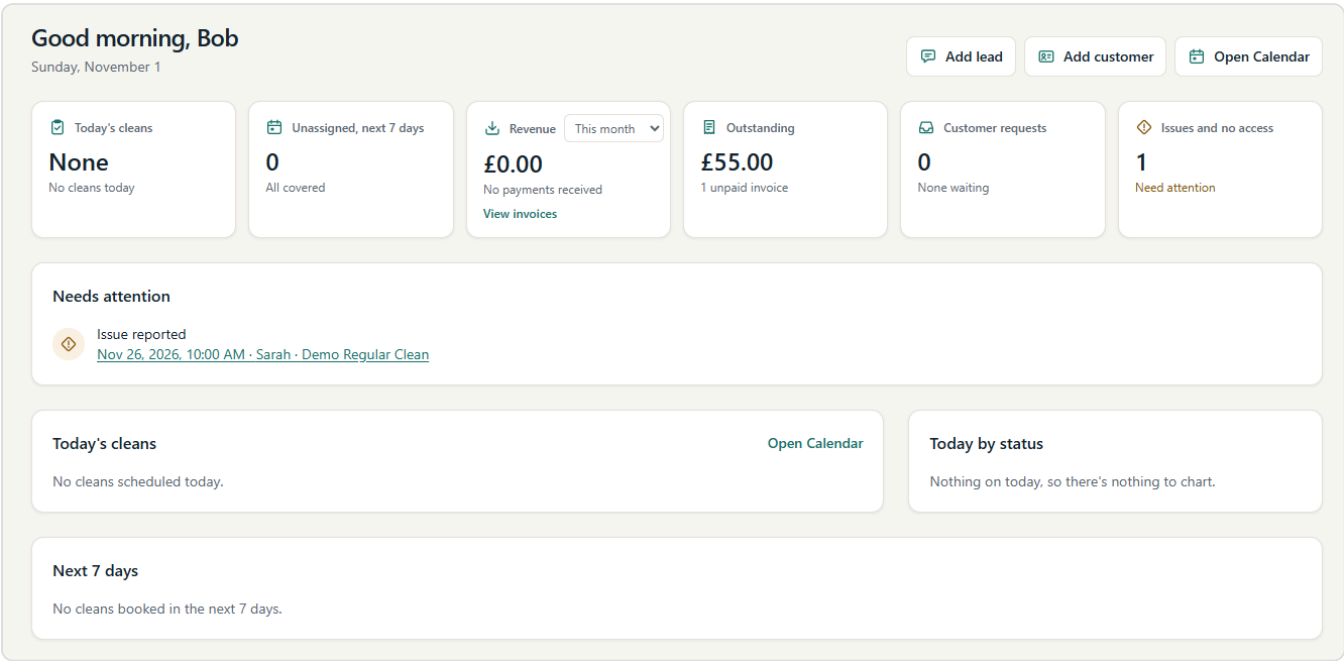
This holds even if your phone or computer is set to another time zone, for example while you are travelling. A clean at 9:00 AM in your business's time zone shows as 9:00 AM for everyone.

Times are shown on the 12-hour clock with AM and PM everywhere in MooTidy, including emails: for example 9:00 AM, 2:05 PM, 12:00 PM (noon) and 12:30 AM (just after midnight).

3. Dashboard

Owners, managers and admins.

The Dashboard answers "what needs me today?" It opens with a greeting and three quick actions: **Add lead**, **Add customer** and **Open Calendar**.



The Dashboard: summary cards at the top, then Needs attention and today's work.

The summary cards

Card	What it shows
Today's cleans	How many cleans are going ahead today, and how many are in progress or completed.
Unassigned, next 7 days	Cleans in the next seven days that still need a cleaner ("All covered" when every clean has one).
Revenue	Money received in the period you choose (below).
Outstanding	What customers currently owe you, and how much of it is overdue.
Customer requests	Requests from the customer portal waiting for your decision.
Issues and no access	Problems and no-access visits cleaners have reported that need attention.

Most cards open the page where you deal with them: **Today's cleans** and **Unassigned, next 7 days** open the Calendar, **Outstanding** opens Invoices and **Customer requests** opens Customer Requests. **Revenue** and **Issues and no access** are summary figures: Revenue has its own **View invoices** link, and each issue or no-access visit is listed under **Needs attention** with a link to its clean.

Revenue, Outstanding and Overdue

These three figures answer different questions:

- **Revenue** is **money actually received**: the total of the payments you have recorded whose payment date falls in the chosen period. Choose the period from the menu on the card: **Today**, **This week** (Monday to today), **This month** (the default), **Last 30 days** or **This year**. The card also shows how many payments that is. A part payment counts only the amount actually received.
- **Outstanding** is **what customers owe you now**: the unpaid balance of every issued or part-paid invoice. Draft and void invoices are not included, and paid invoices have nothing left to owe.
- **Overdue** is **the part of Outstanding that is late**: invoices whose due date has passed. An invoice due today is not overdue yet. The Outstanding card shows the overdue amount in a warning colour, for example "£180.00 overdue".

Changing the Revenue period changes only the Revenue card.

If a figure cannot be loaded, the card says so instead of showing £0.00, so a zero on the Dashboard is always a real zero.

Needs attention

A list of things waiting for you.

Cleans that need something are listed one per row, with the reason and a link to that clean, for example "Issue reported" above "Nov 26, 2026, 10:00 AM · Sarah · Demo Regular Clean". Select the link to open the clean. The reasons are:

- **Needs a cleaner**: a clean in the next 7 days with nobody assigned;
- **Still in progress**: a clean still in progress after its scheduled end;
- **Issue reported**: a cleaner reported an issue that is not resolved yet;
- **No access awaiting decision**: a no-access visit waiting for your charge decision.

The first five cleans are shown. **Show all** lists the rest, and **Show fewer** hides them again.

Below the cleans:

- overdue invoices, for example "2 invoices are overdue" (**View invoices**);
- customer requests waiting for a decision (**Review**).

When nothing is waiting, it says **All clear**. If some checks could not be loaded, it says the list may be incomplete; refresh the page to try again.

Today and the week ahead

- **Today's cleans** lists today's work in time order, with the customer, service, cleaner (or **Unassigned**) and status.
- **Today by status** shows today's cleans by status at a glance.
- **Next 7 days** shows the number of cleans per day, split into assigned and unassigned, so you can spot busy or uncovered days.

4. Leads

Owners, managers and admins.

A lead is someone who has asked about your cleaning but is not a customer yet.

Adding a lead

1. Open **Leads** and select **Add lead** (also on the Dashboard).
2. Fill in what you know. Only **First name** is required. You can also record **Last name, Email, Phone, Postcode, Source** (for example Website, Referral, Facebook, Instagram, Google Search, Flyer, Walk-in or Other), **Requested service, Preferred frequency, Preferred times** and a **Message**.
3. Save. The lead appears in the list with the status **New**.

Working with leads

- The list shows each lead's status, contact details, source and what they want.
- Use **Filter by status** to see, for example, only new leads.
- Change a lead's status from the status menu on the lead as you follow it up: **New, Contacted, Qualified, Declined** or **Closed**.

Converting a lead into a customer

1. On the lead, select **Convert to customer** and confirm.
2. MooTidy creates the customer from the lead's details and opens the new customer, ready for you to add their property.
3. The lead's status becomes **Converted**.

5. Customers

Owners, managers and admins.

The customer list

Customers lists the people and households you clean for, with their status. Use **Search customers** (name, email or phone) and **Filter by status** to find someone. Select a customer to open their page.

Customer statuses are **Lead**, **Active**, **Paused** and **Inactive**.

Adding a customer

1. Select **Add customer** (on the Customers page or the Dashboard).
2. Enter at least the **First name**. You can also add **Last name**, **Preferred name**, **Status**, **Email**, **Phone**, **Preferred contact**, **Source** and **Internal notes**.
3. Save, then open the customer to add their property.

Customers converted from a lead start with the status **Lead**; change it to **Active** when you start cleaning for them.

The customer page

Section	What you do there
Header	See contact details. Edit details to change them. Change the status with the status control.
Properties	Add and edit the homes you clean (see Properties).
Recurring service plans	Set up regular cleans (see Recurring service plans).
Internal notes	Notes for your team only. Edit notes , then Save notes .
Billing	The customer's Outstanding balance , unpaid and paid invoice counts, and Recent payments .
Portal access	Invitations and portal users (see Customer Portal).

Tip: after editing a customer's details, notes or status, check that the change shows on the page. If it does not, the save did not go through: try again.

6. Properties

Owners, managers and admins.

A property is a home you clean for a customer. A customer can have more than one. Add the property before you set up a recurring plan.

Adding or editing a property

1. On the customer's page, under **Properties**, select **Add property** (or **Edit** on an existing one).
2. Enter a **Label** (required, for example "Home" or "Holiday flat") and the address: **Address line 1**, **Address line 2**, **City**, **State / Region**, **Postal code** and **Country**.
3. Add **Bedrooms** and **Bathrooms**, and any notes your cleaners need: **Pets notes**, **Parking notes**, **Parking cost notes**, **Surfaces notes**, **Products to use**, **Products to avoid** and general cleaning notes.
4. Select **Save property**. The property appears under the customer.

Your cleaners see the address and these notes on the jobs they are assigned to. **Delete** removes a property.

Sensitive access details

Each property card has a separate **Sensitive access details** area, marked **Owners, managers and admins only**. It holds how to get in: **Access method**, **Key location**, **Key safe code**, **Alarm instructions** and **Access notes**.

Because these details open someone's home, MooTidy keeps them hidden until you confirm it is you:

1. Select **Reveal access details** (or **Add access details** or **Edit access**).
2. If you have not confirmed recently, MooTidy asks you to **Confirm it is you**. Enter your MooTidy password and select **Confirm**.
3. The details are shown. Select **Save access details** after a change. They hide again automatically after 5 minutes, or straight away with **Hide access details**.

Once you have confirmed, you stay confirmed for 5 minutes, so you can look at several homes without typing your password each time. Having just signed in counts as confirming. If the password is wrong, nothing is shown. If your account uses a second sign-in step, MooTidy may not be able to ask for it on this screen yet; it then shows nothing and tells you so.

Properties

1 home, with access details for each

Add property

 Home

26 Purlewent Drive, Bath, BA1 4ZZ

3 bed · 2 bath

EditDelete

 Sensitive access details

Owners, managers and admins only

Recorded. Hidden until you confirm your password.

Reveal access details

A property with access details recorded but hidden until you confirm your password.

MooTidy never loads access details in the background: they are fetched only when you ask and have confirmed. A cleaner sees them only for a clean they are assigned to, after **Show access details** and the same password check (see My Jobs). They never appear in emails or in the customer portal.

7. Services

Services lists what you offer, how it is priced and how long it takes. Owners and managers can change services; other roles can view them.

Adding a service

1. Select **Add service**.
2. Enter the **Service name** and a **Description** of what the clean includes. Line breaks are kept, so you can write it as a short list.
3. Choose the **Pricing method**: **Hourly Rate** (enter the **Hourly rate**), **Fixed Price** (enter the **Fixed price**) or **Quote Required** (the price is confirmed later on the invoice).
4. Set the **Default duration (minutes)** and, if you use one, the **Minimum duration (minutes)**. **Display order** controls the list order (lower first).
5. Under **Options**, choose whether it **Can be booked as a recurring clean** and whether it is **Visible to customers**.
6. Save.

Use **Edit** to change a service, deactivate it to stop offering it without deleting it, or **Delete** it (MooTidy asks you to confirm).

Add-ons

Add-ons are optional extras, such as inside the fridge. Select **New add-on**, enter the **Add-on name**, choose what it is **Offered with** (one service or all services), its **Price** and any **Extra time (minutes)**.

Cleaning checklists

The **Checklists** tab holds the steps for each service.

1. Choose the **Service** and select **New item**.
2. Enter the **Item** (for example "Worktops wiped and dried"), an optional **Section** (for example Kitchen), whether it is **Required**, and its **Display order**.

Each job keeps its own copy of the checklist from when the job was prepared, so changing a checklist later does not change jobs already prepared.

8. Recurring service plans

Owners, managers and admins.

A recurring service plan records the regular clean you have agreed with a customer: which home, which service, how often and at what price. Plans are how most of your Calendar is filled.

Properties

1 home, with access details for each

Home

26 Purlewent Drive, Bath, BA1 4ZZ

3 bed · 2 bath

Edit

Delete

Sensitive access details

Owners, managers and admins only

Recorded. Hidden until you confirm your password.

Reveal access details

Add property

Recurring service plans

New plan

Demo Hourly Clean

Active

Edit

Delete

Property

Home

Schedule

Weekly

Monday · 1:00 PM · 120 min

Price

£22.00 per hour

Runs

Jan 4, 2027 to Jan 18, 2027

Cleaner

Bob Washerman

Manage add-ons

Demo Regular Clean

Active

Edit

Delete

Property

Home

Schedule

Fortnightly (every 2 weeks)

Thursday · 10:00 AM · 150 min

Price

£75.00 per visit

Runs

Oct 29, 2026 to Mar 31, 2027

Cleaner

Bob Washerman

Manage add-ons

On the customer's page: the property, then each recurring plan with its schedule, dates, price and cleaner.

Creating a plan

1. On the customer's page, under **Recurring service plans**, select **New plan**.
2. Choose the **Property** and the **Service**.
3. Choose the **Recurrence type**: **Weekly**, **Fortnightly (every 2 weeks)**, **Every N Weeks** (then enter the **Interval (weeks)**) or **Monthly (same calendar day)**. A monthly plan on the 31st falls on the last day of shorter months.
4. Set the **Start date** and, if the plan has one, the **End date** (leave it blank for an ongoing plan).
5. Set the **Preferred day**, **Preferred start time** and **Default duration (min)**.
6. Choose the **Cleaner**, or leave it **Unassigned**. The plan's cleaner is given to the cleans generated from then on (see Who cleans the generated cleans).

7. Choose the **Pricing method** and enter the **Hourly rate** or **Fixed price**.
8. Select **Save plan**. The plan appears with its property, schedule, price and cleaner.

MooTidy checks the form before saving (for example, an end date before the start date is refused) and keeps what you typed if anything needs fixing.

Plan add-ons and status

- Add extras to a plan with + **Add add-on**: choose the **Add-on**, its **Agreed price**, **Additional duration (min)** and **Quantity**.
- Change the plan's status with the **Plan status** control: **Draft**, **Active**, **Paused** or **Ended**.

From plan to cleans

A plan does not put cleans in the Calendar by itself. When you want cleans created:

1. Open **Calendar** and select **Generate jobs**.
2. Choose the **Recurring plan**. Each active plan is named by customer, service, property and recurrence, for example "Sarah · Demo Regular Clean · Home, 26 Purlewent Drive · Fortnightly from Oct 29, 2026". Below it, MooTidy says how far the plan already runs, for example "Generated through Jan 18, 2027." For a plan with an end date that already has every clean, it adds "This plan is fully generated through its end date of ...".
3. Choose the **Generate through date**. MooTidy creates a clean for every plan date up to and including this date. Dates that already have a clean are skipped.
4. Select **Generate**. MooTidy says how many new cleans it created, or **No new cleans needed** when every date already has a clean. Select **Done** to see them in the Calendar.

Generate recurring jobs

×

Create the upcoming cleans for one active plan.

Recurring plan

Sarah · Demo Hourly Clean · Home, 26 Purlewent Drive · Weekly from Jan 4, 202 ▼

Generated through Jan 18, 2027. This plan is fully generated through its end date of Jan 18, 2027.

Generate through date

31/12/2026 📅

MooTidy creates a clean for every plan date up to and including this date. Dates that already have a clean are skipped.

CloseGenerate

Generate jobs: choose the plan and how far ahead to create cleans.

Generating again never duplicates cleans that already exist, so you can safely extend a plan further ahead later. A plan with an end date never gets cleans after its end date.

Who cleans the generated cleans

- Each clean gets the plan's cleaner (if one is set) **at the moment it is generated**.
- If you later change the plan's cleaner, cleans already in the Calendar keep the cleaner they have. Change those one at a time on each clean (**Assign cleaner**, and **Remove** for the old cleaner). Cleans generated after the change get the new cleaner.
- When Generate creates cleans assigned to a cleaner, MooTidy sends that cleaner one summary email (**Regular work assigned**), for example "New regular work: 4 cleans from Thursday, 7 January 2027 at 9:00 AM", rather than one email per clean.

9. Calendar and scheduling

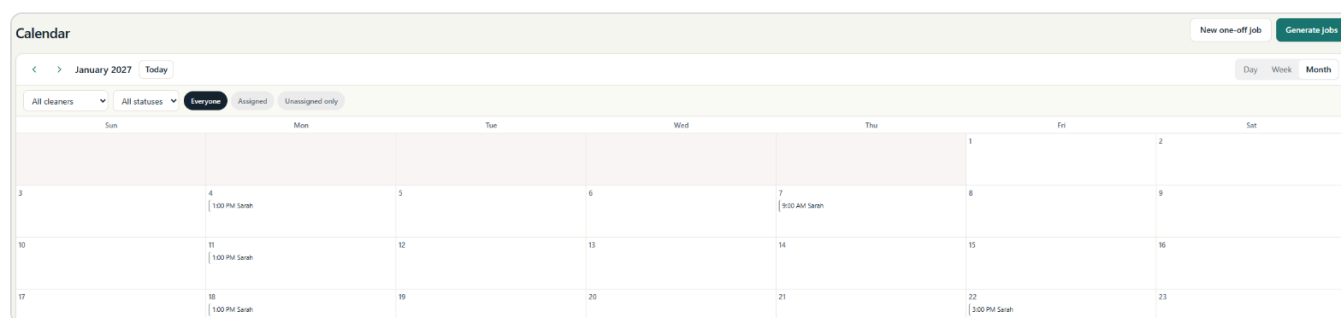
Owners, managers and admins.

The Calendar

Calendar shows your cleans by day, week or month. Use the previous and next arrows to move, and **Today** to come back. Narrow the view with:

- **Cleaner:** one cleaner or **All cleaners**;
- **Status:** one status or **All statuses**;
- **Assignment:** **Everyone**, **Assigned** or **Unassigned only**.

Cleans with nobody assigned are marked **Unassigned**. Days and times always follow your business's time zone.



The Calendar in Month view. Use Day, Week or Month, and the filters to narrow it down.

Job statuses are **Scheduled**, **Confirmed**, **In Progress**, **Completed**, **Skipped**, **Cancelled** and **No Access**.

Booking a one-off clean

1. Select **New one-off job**.
2. Choose the **Customer**, **Property** and **Service**, and optionally a **Cleaner**. Choosing a service fills in its pricing method, price and default duration.
3. Set the **Date**, **Start time** and **Duration (min)**, and any add-ons and notes. You can change the duration, pricing method or price for this clean; the service itself is not changed. Choosing a different service fills in that service's defaults again.
4. Save. If the cleaner already has work at that time (or too close to it for the travel buffer, or outside their availability), MooTidy shows the clash. Choose a different time, or **Create anyway**.

Working with a clean (Job Detail)

Select a clean in the Calendar to open its details. You can see the times, customer, property, cleaners, notes and, once work has started, what happened **On the day** (arrived, started, completed, actual duration, outcome, or no access).

Demo Hourly Clean

Sarah · Mon, Jan 18

Scheduled

Rescheduled

Recurring

Start

Jan 18, 2027, 1:00 PM

End

Jan 18, 2027, 3:00 PM

Duration

2 h

Job Detail shows the clean's status, times and duration on your business's clock.

Cleaners

Assign cleaner

Bob Washerman

Primary

Remove

Part of a recurring plan (Weekly), starting Jan 4, 2027.

Add today's priorities

On the day

Confirm

Reschedule

Edit

Other actions

Skip

Cancel job

The cleaners, then the main actions. Skip and Cancel job are under Other actions.

To...	Do this
Assign a cleaner	Assign cleaner , choose the Cleaner and Role (Primary or Assistant) , then Assign . If there is a clash, MooTidy shows it; select Assign anyway to go ahead.
Remove a cleaner	Remove next to their name.
Confirm the clean with the customer	Confirm .
Give the cleaner priorities for this visit	Add today's priorities . The cleaner sees them on this job only.
Move the clean	Reschedule , set the New start . The New end moves with it, so the clean keeps its length; change the end only if the length should change. Add an optional Reason , then Reschedule .
Change times or notes	Edit , change the Start , End , Estimated duration (min) , Customer notes or Internal notes , then Save . The duration always matches Start and End: changing it moves the end. For an hourly clean it is the time invoiced.
Skip one visit of a plan	Under Other actions , Skip .
Cancel the clean	Under Other actions , Cancel job , add an optional Reason , and confirm.
Deal with a reported issue	Under Reported issues , add optional resolution notes and select Resolve .
Invoice a completed clean	Under Billing , select Create invoice (see Invoices).
Open the clean's invoice	Under Billing , select the invoice number, for example DEMO-0010. It opens that invoice.
Decide on a no-access or late-cancellation charge	Under Billing , use Charge decision : choose the Charge type , then Charge (with an Amount) or Waive , and Submit . Charging creates an invoice; waiving does not.

After each action MooTidy says what happened, for example **Cleaner assigned**, **Clean rescheduled** (with the new day and times), **Job cancelled** or **Invoice created**, and what to do next where there is a next step.

Rescheduled, cancelled and newly assigned cleans can email the cleaners involved (see Notifications).

10. My Jobs (for cleaners)

Anyone who cleans: cleaners, contractors, and owners or managers who also clean.

My Jobs is the cleaner's workspace. It shows only your own cleans and the details you need to do them. It is designed for a phone.

Today and Upcoming

- **Today** lists your cleans for today, in time order.
- **Upcoming** lists your cleans for the next 90 days, grouped under **Today**, **Tomorrow** and each later date. Cancelled cleans are left out.

Each clean shows the start and end time, its status, the customer, the address and the service with its length. Tap a clean to open it.

My Jobs

Sunday, November 1. Tap a job to see the details.

Today **Upcoming**

Fri, Nov 13

2:00 PM to 4:30 PM **Completed**

Sarah
26 Purlewent Drive, Bath, BA1 4ZZ
Demo Regular Clean · 2 h 30 min · Regular clean

Thu, Nov 26

10:00 AM to 12:30 PM **In Progress**

Sarah
26 Purlewent Drive, Bath, BA1 4ZZ
Demo Regular Clean · 2 h 30 min · Regular clean

Thu, Dec 3

10:00 AM to 12:30 PM **No Access**

Sarah
26 Purlewent Drive, Bath, BA1 4ZZ
Demo Regular Clean · 2 h 30 min

Fri, Dec 11

9:00 AM to 12:30 PM **Scheduled**

Sarah
26 Purlewent Drive, Bath, BA1 4ZZ
Demo Regular Clean · 3 h 30 min · Regular clean

My Jobs on the Upcoming tab: each clean with its time, status, address and service.

Doing a clean

When you open a clean, MooTidy shows one main button for the next step:

The screenshot shows the MooTidy app interface for a scheduled clean. At the top, it displays the time '9:00 AM to 12:30 PM' and a 'Scheduled' status. Below this is the name 'Sarah' and the address '26 Purlewent Drive, Bath, BA1 4ZZ'. The clean type is 'Demo Regular Clean · 3 h 30 min · Regular clean'. A large green button labeled 'I've arrived' is prominent. Below it are two buttons: 'Start clean' and 'No access'. A checklist section follows, showing '0 of 3 done'. The checklist items are: 'Bins emptied', 'Bathroom cleaned Required', and 'Worktops wiped Required'. The bottom of the screen shows the 'Home' button and the address '26 Purlewent Drive, Bath, BA1 4ZZ'.

An open clean: the main button is always the next step, with the checklist below.

1. **I've arrived**: tap when you get there. (If you prefer, you can go straight to **Start clean**.)
2. **Start clean**: tap when you begin. MooTidy shows the start time and how long you have been cleaning.
3. **Checklist**: tap each item as you finish it. Items marked **Required** must be done. The bar shows how many are done.
4. **Complete job**: add any **Completion notes** (optional), then tap **Complete job**. MooTidy shows that the clean is completed, with the time.

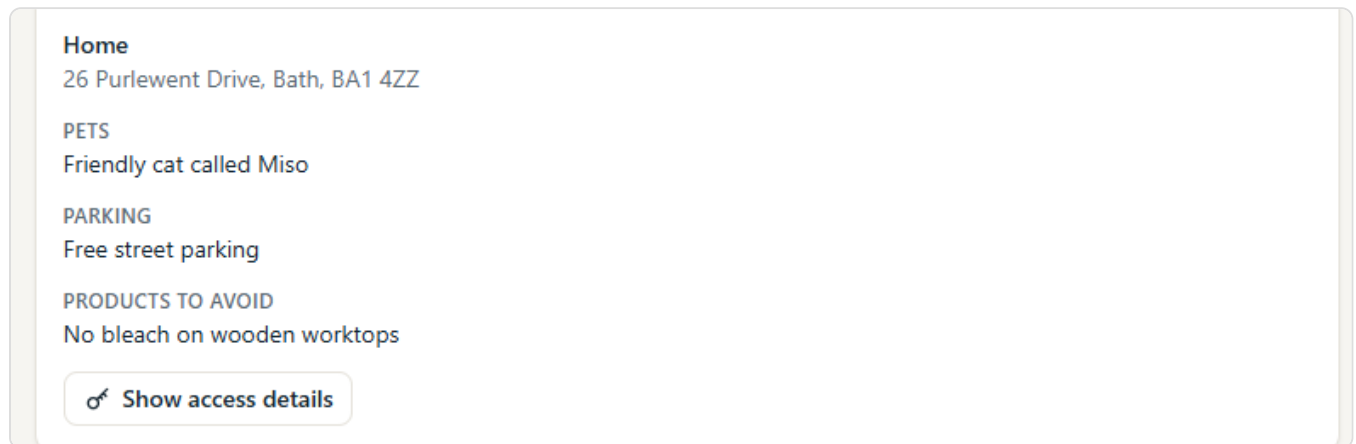
If required checklist items are not done, MooTidy asks first, for example "2 required checklist items are not done. Complete the job anyway?"

- Tap **Complete anyway** to complete it. It is recorded as completed with required items incomplete, so your manager can see that.
- Tap **Go back** to return and finish the items.

Tap **Complete job** once; MooTidy shows **Completing...** while it saves. If something goes wrong, it says the job could not be completed and the button stays available. Only treat the clean as completed when MooTidy shows it as completed.

What you can see on a clean

- **Today's priorities** from your manager, if any.
- **Job notes, Cleaning notes, Pets, Parking, Products to use, Products to avoid**, and any additions.
- The property name and address.
- **Show access details**: tap to see how to get in (for example the key safe code). Unless you confirmed in the last 5 minutes, MooTidy first asks for your MooTidy password. The details hide again automatically after 5 minutes, or tap **Hide**. They are only available for cleans you are assigned to.



Notes for the clean, and Show access details, which asks for your password first.

- After the clean: when you arrived, started and completed, and how long it took.

Reporting an issue

If something is wrong (damage, a safety concern, not enough time, and so on):

1. Tap **Report issue**. It appears once you have started the clean.
2. Choose the **Type** (for example Damage Concern or Insufficient Time), describe **What happened**, and choose **How serious** (**Low**, **Medium** or **High**).
3. Tap **Send report**. Your manager is alerted, and the issue is listed on the clean.

When you cannot get in

1. Tap **No access** (available before or during the clean).
2. Optionally add a **Reason**, for example "Nobody home and the key safe was empty".
3. Tap **Confirm no access**. The clean is marked **No Access** and your manager is alerted.

What cleaners do not see

My Jobs never shows prices, invoices, payments, business figures or other cleaners' work. Cleaners see only their own assigned cleans.

11. My Cleaner Profile

Anyone who cleans.

My Cleaner Profile holds your work profile in this business.

- **My details** (you can change these yourself): **Display name** (how your name appears on jobs) and **Home or starting postcode** (optional, for planning routes). Select **Save my details**.
- **Set by your manager:** your **Worker classification** (Employee, Contractor or Owner-Cleaner) and your **Status** (Active or Inactive). These are managed for you.

If you do not have a cleaner profile yet, MooTidy offers **Create cleaner profile**. Adding your first availability also creates it.

For owners and managers who also clean: your own profile shows **Management settings** instead of "Set by your manager". There you can set the **Worker classification**, whether you are an **Active cleaner**, and **Internal notes**, then **Save management settings**. Internal notes are for management only and are never shown to cleaners.

12. My Availability

Anyone who cleans.

My Availability records when you are normally available to work. MooTidy uses it to warn when a clean is booked outside your hours. It is your normal working pattern, not a rota or a holiday-booking system.

Your usual week

Your week is shown Monday to Sunday. For each day:

- **Add hours:** choose **From** and **To**, then **Save**. You can add more than one block on a day (for example 8:00 AM to 12:00 PM and 1:00 PM to 5:00 PM). Blocks on the same day cannot overlap, and the end must be after the start.
- **Edit** or **Remove** a block.
- Days with no hours show **Not available**.

To repeat a day, use **Copy hours from** and **Copy to**, then **Copy**. Copying replaces the hours already set on the second day.

Time off and one-off changes

For holidays, sickness or extra hours on a particular date:

1. Select **Add a change**.
2. Choose **Time off** or **Extra hours**.
3. Set the **From date** and **To date** (they start as today's date).
4. For time off, keep **All day** ticked or untick it to give times. Extra hours always need a **From** and **To** time.
5. Add an optional **Reason**, then **Save change**.

Changes are listed with their dates and times; **Remove** deletes one.

13. Customer Requests

Owners, managers and admins. Only relevant if you use the customer portal.

Customers using the portal can ask for changes: **Reschedule a clean**, **Skip a clean**, **Extra service**, **Property update**, **Contact update** or **General request**. **Customer Requests** collects them. Nothing changes until you decide.

Each request shows who sent it, when, and what it is about:

- A **Reschedule a clean** request shows the **Current clean** (with **View clean** to open it), what the customer **Requested instead** (a date, and a time if they gave one, for example "Fri 22 Jan 2027, 2:00 PM" or "Fri 8 Jan 2027, any time") and the **Customer's message**.
- A **Skip a clean** request shows the clean it is about.
- A **Property update** request shows which of the customer's properties it is about, for example "Sarah · Home".

Customer Requests

Changes your customers have asked for. Nothing changes until you decide.

All Submitted Under review Approved Rejected Applied

Reschedule a clean

Sarah · Sent Oct 31, 2026, 8:21 PM

Current clean

Fri 22 Jan 2027, 3:00 PM · Demo Regular Clean · Home [View clean](#)

Requested instead

Fri 22 Jan 2027, 2:00 PM

Applied

A reschedule request: the clean as booked now, and what the customer asked for instead.

Use the filters at the top (**All**, **Submitted**, **Under review**, **Approved**, **Rejected**, **Applied**) to narrow the list.

For each request you can:

- write a **Response to the customer** (optional);
- **Mark under review** while you look into it;
- **Approve** or **Reject** it;
- mark it applied once you have made an approved change.

Approving does not change anything by itself. For a reschedule:

1. **Approve** the request.
2. Open the clean (**View clean**) and **Reschedule** it to the time you agree. That can be the time asked for or another time you agree with the customer.
3. Back in Customer Requests, select **Mark applied and email customer**. MooTidy emails the customer to confirm the booking as it now stands in your Calendar ("Your cleaning booking is confirmed"), with the real date and time.

If the clean is no longer active (for example it was cancelled), the button is **Mark applied** instead, and MooTidy says no booking confirmation will be sent. For other request types, make the change yourself,

then **Mark applied**.

The customer sees your decision and response in the portal, and is emailed when you approve or decline (if those emails are switched on). A customer can cancel their own request while it is submitted or under review.

14. Invoices

Owners, managers and admins.

Creating an invoice

Invoices are created from completed cleans:

1. In the **Calendar**, open a completed clean.
2. Under **Billing**, select **Create invoice**.

MooTidy creates a **Draft** invoice with a line for the clean (and any add-ons), and says what to do next: review it and issue it from **Invoices**. A charge decision (see Calendar and scheduling) can also create an invoice.

How a clean is priced on the invoice

- **Hourly** cleans are invoiced for the clean's **booked length** times its hourly rate, for example "2.5 × £22.00" for a 2 h 30 min clean.
- The cleaner's actual time (from arriving to completing) is kept for your own records. It does **not** change what the customer is invoiced.
- If a clean really should be billed for a different length, change the clean's times or duration with **Edit** before you create the invoice.
- **Fixed-price** cleans are invoiced at their fixed price, whatever the length.
- Once the invoice is created, later changes to the clean do not change it. To correct a draft, edit its lines; see also Voiding.

Demo Hourly Clean	£55.00
Cleaning Service · 2.5 × £22.00	
<hr/>	
Total	£55.00
Balance due	£55.00
<hr/>	
NOTE	
Thank you, Sarah.	

An hourly clean is invoiced at its booked length times the rate.

Invoice numbers

The invoice number is given **when the draft is created**, using your prefix and the next number in sequence (for example INV-0001 or MC-1135). The number stays with that invoice for good: it does not change when you edit or issue the invoice, and a number is never reused, even if the invoice is voided. Set the prefix and the next number in Business Settings (owner only).

Checking and editing a draft

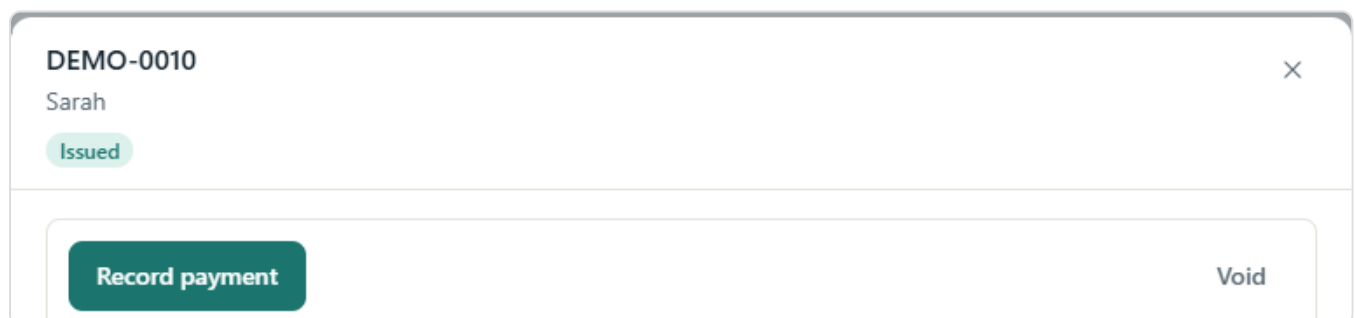
Open an invoice from **Invoices** to see it as the customer will: your business, **Bill to**, **Invoice date**, **Due date**, **Line items** and totals.

While it is a draft you can:

- **Edit** or **Remove** a line, or **Add line** (for example an Adjustment, Discount, Cancellation Charge or No Access Charge);
- **Confirm price** on any line marked **Price confirmation required** (for Quote Required services). An invoice cannot be issued until every price is confirmed. If the invoice has a Quote Required add-on, MooTidy may also ask you to confirm the price of other priced add-ons on it. Their amounts are already right: check them and confirm;
- write a **Note to customer** (shown on the invoice and in the invoice email; line breaks are kept) and an **Internal note** (only your team sees it).

The invoice also shows **Payment details**: your payment instructions and bank details from Business Settings, with the invoice number as the payment reference.

Issuing

The screenshot shows a user interface for an invoice. At the top, it displays 'DEMO-0010' with a close button (X) on the right. Below this, the name 'Sarah' is shown. A green pill-shaped button labeled 'Issued' is positioned below the name. The main area of the interface contains two buttons: a large green button labeled 'Record payment' on the left and a smaller, light grey button labeled 'Void' on the right.

An issued invoice. From here you record a payment, or void it if it has no payments.

1. Select **Issue invoice**.
2. Optionally set a **Due date**. Leave it blank to use your default payment terms.
3. Confirm. The invoice becomes **Issued**, and the customer is emailed their invoice (when email notifications are on and the customer has an email address).

Once issued, the lines and the note to customer can no longer be changed. The internal note can still be edited.

Statuses

Status	Meaning
Draft	Being prepared. Not owed yet.
Issued	Sent to the customer and unpaid.
Partially Paid	Some has been paid; a balance remains.
Paid	Nothing left to pay.
Void	Cancelled. Not owed.

An issued or part-paid invoice past its due date is shown as **Overdue**. On **Invoices**, use the filters (**All**, **Draft**, **Issued**, **Partially paid**, **Paid**, **Void**, **Overdue**) or search by invoice number or customer.

Invoices

What customers owe you, what is overdue and what has been paid.

All

Draft

Issued

Partially paid

Paid

Void

Overdue

Invoice	Customer	Issued	Due	Total	Paid	Balance	Status
DEMO-0010	Sarah	Oct 31, 2026	Nov 7, 2026	£55.00	£0.00	£55.00	Issued
INV-0002	Sarah	Oct 30, 2026	Nov 6, 2026	£75.00	£75.00	£0.00	Paid
INV-0001	Sarah	Not issued	Not set	£25.00	£0.00	£25.00	Draft

The Invoices list: what each customer owes, what is paid, and each invoice's status.

Voiding

To cancel an invoice that has no payments, select **Void invoice**, optionally give a **Reason**, and confirm. The clean can then be invoiced again, with a new number. An invoice that has payments cannot be voided.

15. Recording payments

Owners, managers and admins.

When a customer pays:

1. Open the invoice and select **Record payment**.
 2. Enter the **Amount**.
 3. Check the **Date**. It starts as today's date in your business's time zone; change it to the day the money was actually received.
 4. Choose the **Method** (**Bank Transfer**, **Direct Debit**, **Cash**, **Card** or **Other**), and add a **Reference** and **Payment notes** if useful.
 5. Save.
- A payment for less than the balance makes the invoice **Partially Paid**. Record each further payment the same way.
 - When the balance reaches zero the invoice becomes **Paid**.
 - You cannot record more than the balance due.
 - The payment appears under **Payments received** on the invoice and in the customer's **Billing**, and counts towards **Revenue** for its date.

Recorded payments cannot currently be edited or removed. Check the amount and payment date before saving. If you record a payment incorrectly, do not enter another payment to compensate for it. Contact your MooTidy support contact for help before making further changes.

16. Finance at a glance

In this version, Finance covers:

- **Invoices:** create, issue, void and track invoices.
- **Payments:** record full and part payments.
- **Revenue:** money received in a period (Dashboard).
- **Outstanding** and **Overdue:** what is owed and what is late (Dashboard and Invoices).
- **Billing** on each customer: their balance and recent payments.

Finance in MooTidy v0.1 does not include expenses, profit, cash flow, accountant or VAT reporting, payouts to cleaners, PDF invoices or exports. See What v0.1 does not include.

17. Notifications

Owners, managers and admins.

MooTidy can send emails to your customers, your cleaners and your management team. **Notifications** shows what was sent and lets you choose which emails go out.

The emails MooTidy can send

For	Email	When
Customers	Upcoming clean reminder	Before a scheduled clean (see timing below).
Customers	Invoice issued	When you issue an invoice, with the payment details. Always sent.
Customers	Overdue invoice reminders	1, 7 and 14 days after an invoice becomes overdue, while it is unpaid.
Customers	Portal invitation	When you invite a customer to the portal. Always sent.
Portal users	Request received, Request approved, Request declined	When they make a request and when you decide on it.
Portal users	Reschedule request booking confirmation	When you select Mark applied and email customer on a reschedule request: confirms the date and time the clean is now booked for. Always sent.
Cleaners	Job assigned, Job unassigned, Assigned job cancelled, Assigned job rescheduled	When their work changes.
Cleaners	Regular work assigned	When Generate creates plan cleans assigned to them: one summary email per run, not one per clean.
Management	No-access alert, Job issue alert	When a cleaner reports no access or an issue.

Emails never include key safe codes or other access details. Times in emails use the 12-hour clock on your business's time zone, for example "Friday, 22 January 2027 at 3:00 PM".

Settings

On the **Settings** tab, emails are grouped by who receives them (**Customers, Cleaners, Management**). Switch each one on or off. **Invoice issued, Portal invitation** and **Reschedule request booking confirmation** are marked **Always sent** and cannot be switched off.

For the upcoming clean reminder, choose when it is sent: **The day before (24 hours), Two days before (48 hours)** or **Three days before (72 hours)**.

If MooTidy shows "Email notifications aren't switched on yet.", emails are being held rather than sent.

Activity

The **Activity** tab lists the emails for your business, newest first, with filters for status, notification type and dates. Statuses include **Waiting to send**, **Sent**, **Delivered**, **Bounced**, **Marked as spam**, **Failed**, **Not sent** (with the reason, for example turned off in your settings or no valid email address) and **Blocked by email provider**. A failed email can be retried with **Retry**.

18. Customer Portal

Optional, and switched off until you turn it on.

The customer portal lets a customer sign in to see their own cleans and invoices and to ask for changes. You never have to use it: everything a customer can do there, you can do for them.

Turning it on

The owner turns the portal on. In **Business Settings**, under **Customer portal**, switch on **Customer portal enabled**, and choose which requests customers may make: **Allow reschedule requests**, **Allow skip requests** and **Allow property update requests**. Only turn the portal on when you are ready to invite customers.

Customer portal Which self-service features your customers can use in the portal.	
Customer portal enabled Customers can sign in and manage their account in the portal.	☒
Allow reschedule requests Customers can request changes to upcoming job dates.	☒
Allow skip requests Customers can request to skip a scheduled visit.	☒
Allow property update requests Customers can request updates to their property details.	☒

Business Settings, Customer portal: the owner decides whether the portal is on, and which requests are allowed.

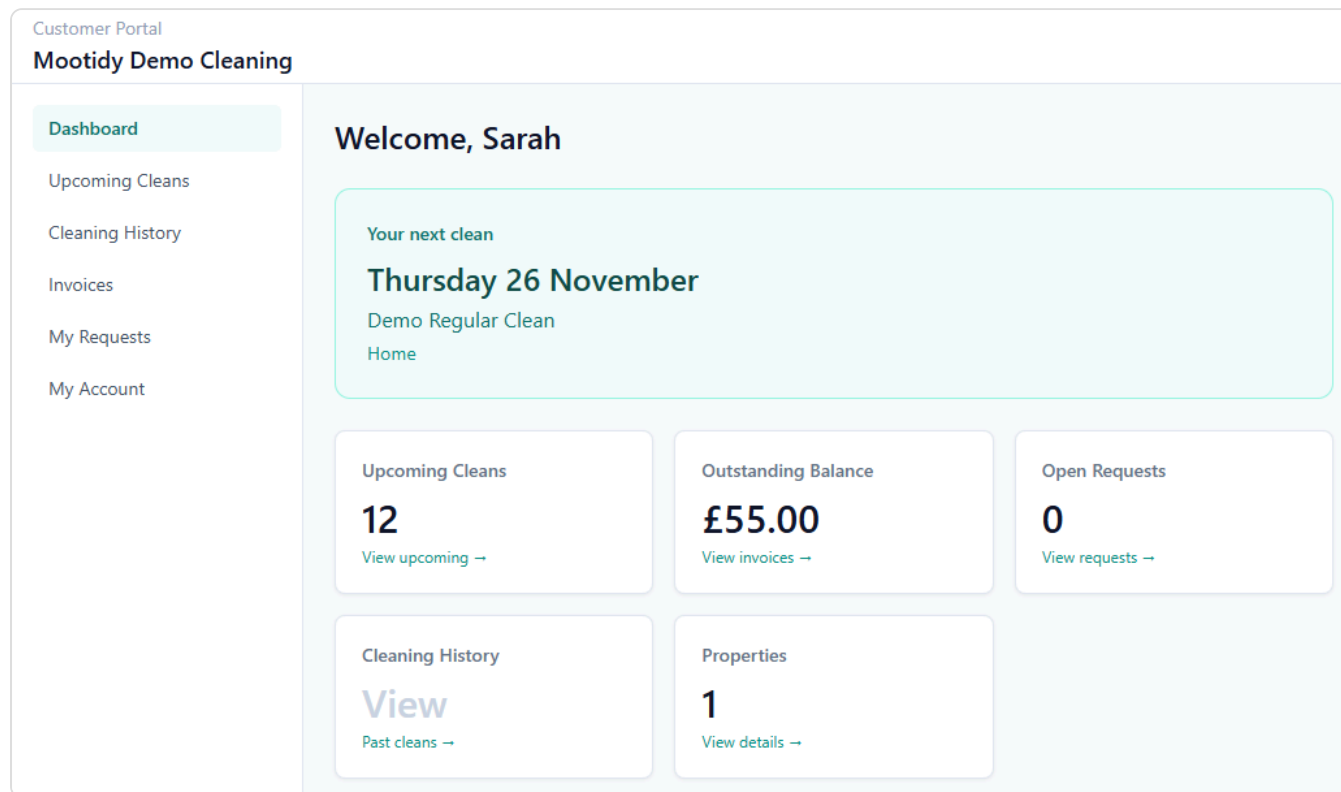
Inviting a customer

1. On the customer's page, under **Portal access**, select **Create invitation**.
2. MooTidy shows an **Invitation link**. Copy it now: it is shown only once. MooTidy also emails the invitation to the customer; you can send the link yourself by email or text as well.
3. The customer opens the link, signs in or creates an account with the same email address that received the invitation, and their portal access becomes active.

An invitation link works once. Under **Portal users** you can **Suspend**, **Reactivate** or **Revoke** a customer's access.

What customers see

The portal has: **Dashboard**, **Upcoming Cleans**, **Cleaning History**, **Invoices** (issued invoices and their details), **My Requests** (with **New Request**) and **My Account**. Customers only ever see their own household. They never see your internal notes, the cleaner's actual clock times or property access details. Times are shown on your business's clock.



The customer portal Dashboard: the next clean, upcoming cleans, history, invoices and requests.

Upcoming Cleans and Cleaning History

Every clean a customer can see is in exactly one of the two lists:

- **Upcoming Cleans** holds cleans still to happen (scheduled, confirmed or in progress) dated today or later on your business's calendar. A clean the cleaner is doing now is marked **In progress**. On a clean that has not started, the customer can select **Request a change**.
- **Cleaning History** holds every finished clean (completed, skipped, cancelled or no access), whatever its date, as soon as it is finished. It also holds any earlier clean that has not been completed or closed yet, labelled **Awaiting update** (if it was scheduled or confirmed) or **In progress**. History shows each clean's booked duration, never the cleaner's actual time, and has no Request a change.

Mootidy Demo Cleaning

[Dashboard](#)[Upcoming Cleans](#)[Cleaning History](#)[Invoices](#)[My Requests](#)[My Account](#)

Upcoming Cleans

Thursday 26 November

In progress

10:00 AM · Demo Regular Clean

Home

26 Purlewent Drive, Bath, BA1 4ZZ

Est. duration: 150 min · Recurring

Friday 11 December

9:00 AM · Demo Regular Clean

Home

26 Purlewent Drive, Bath, BA1 4ZZ

Est. duration: 210 min · Recurring

[Request a change](#)

Thursday 24 December

10:00 AM · Demo Regular Clean

Home

26 Purlewent Drive, Bath, BA1 4ZZ

Est. duration: 150 min · Recurring

[Request a change](#)

Monday 4 January

1:00 PM · Demo Hourly Clean

Home

26 Purlewent Drive, Bath, BA1 4ZZ

Est. duration: 120 min · Recurring

[Request a change](#)

Upcoming Cleans: cleans from today onwards, each with Request a change until it starts.

Customer Portal
Mootidy Demo Cleaning

Dashboard
Upcoming Cleans
Cleaning History
Invoices
My Requests
My Account

Cleaning History

3 December 2026
Demo Regular Clean · Home
Booked duration: 2 h 30 min

No Access

13 November 2026
Demo Regular Clean · Home
Booked duration: 2 h 30 min

Completed

31 October 2026
Demo Hourly Clean · Home
Booked duration: 2 h 30 min

Completed

30 October 2026
Demo Hourly Clean · Home
Booked duration: 2 h 30 min

Cancelled

29 October 2026
Demo Regular Clean · Home
Booked duration: 2 h 30 min

Cancelled

Cleaning History: finished cleans, and earlier cleans still awaiting an update.

MooTidy never changes a clean's status by itself. If a customer's history shows **Awaiting update**, that clean still needs closing on your side: complete, skip or cancel it in the Calendar.

Requests from the portal

On **My Requests**, the customer selects **New Request** and chooses the type: **Reschedule**, **Skip a Clean**, **Extra Service**, **Property Update**, **Contact Update** or **General Request**.

- **Reschedule** and **Skip a Clean**: the customer chooses **Which clean?** from their upcoming cleans. For a reschedule they also say **When would you like this clean instead?**: a **Date** (today or later) and, optionally, a **Time**. Leaving the time blank means any time that day suits them. Nothing changes until you have reviewed the request (see Customer Requests).
- **Property Update** is always about one of the customer's own properties, and they see which before sending. With one property, it is chosen for them and shown, for example "Home · 1 High Street, Bath". With several, they choose from **Which property?** and must pick one. With none, MooTidy says "There are no properties available for this request." and the request cannot be sent. Only the property's name and address are shown, never notes or access details.
- The other types need only a message.

After sending, the customer sees **Request sent** and the request is listed as **Submitted**, then shows your decision and response.

Customer Portal

Mootidy Demo Cleaning

Dashboard

Upcoming Cleans

Cleaning History

Invoices

My Requests

My Account

My Requests

Property Update

1 Nov 2026, 3:03 AM

F26 test: please confirm the parking information for Home.

Cancelled

Reschedule

31 Oct 2026, 8:21 PM

Requested: Fri 22 Jan 2027, 2:00 PM

Applied

New Request

My Requests: the customer's requests and their status.

My Requests

Submit a request

Request type

Property Update

Property

Home · 26 Purlewent Drive, Bath BA1 4ZZ

Message

Describe what you'd like...

Cancel

Submit

A Property Update request: the property it is about is shown before sending.

The **New Request** list currently shows every request type, including any you have switched off in Business Settings. A customer who chooses a switched-off type cannot send it. If you switch types off, tell your customers which requests you accept.

Staff who also have portal access see **Switch to Customer Portal** in the menu.

19. Business Settings

Only the owner can change Business Settings. Managers and admins can open the page to look, but their changes are not saved.

Section	Settings
Business identity	Business name , Trading name (if customers know you by another name), Logo URL (a link to your logo).
Contact and address	Phone , Email , address, Postal code .
Locale	Country , Time zone (sets your business day everywhere in MooTidy) and Currency .
Scheduling defaults	Default travel buffer (minutes) between jobs, used in clash checks, and Cancellation notice (hours) .
Customer portal	See Customer Portal.
Invoice and payment details	Owner only (below).
About MooTidy	Version and Build , for support.

Locale

Your time zone sets the business day the Calendar uses.

Country

Time zone

Currency

United Kingdom

UK time (London)

GBP - British Pound

Scheduling defaults

Default travel buffer (minutes)

Cancellation notice (hours)

15

48

Travel time between jobs.

Minimum notice before a booking can be cancelled.

Locale sets your business day and clock; Scheduling defaults set the travel buffer and cancellation notice.

Invoice and payment details (owner only)

- **Invoice prefix:** up to 12 letters, numbers or `- / . _`, including your own separator (for example `MC-`).
- **Next invoice number:** the number the next new invoice will get. MooTidy shows the next invoice number as it will appear. Once invoices exist, it cannot be set lower than the last one used.
- **Payment due (days after issue):** sets the due date on new invoices.

- **Payment terms and instructions:** any extra instructions for paying.
- **Bank account name, Sort code** and **Account number**.

Payment details appear on the invoice and in the invoice and overdue emails, with the invoice number as the reference. Changing the prefix never renames existing invoices.

20. Roles and access

Each person in your business has one or more roles. One person can hold several, for example an owner who also cleans.

Role	What they do in MooTidy
Owner	Runs the business: everything a manager does, plus Business Settings, the customer portal switch, invoice numbering and payment details.
Manager	Runs the day-to-day: Dashboard, Leads, Customers, Customer Requests, Calendar, Invoices and payments, Services and Notifications. Can view Business Settings.
Admin	Supports the office: the same work as a manager, except changing services. Can view Business Settings.
Cleaner	Does the cleans: My Jobs, My Cleaner Profile, My Availability, and Services to view.
Contractor	Works like a cleaner in My Jobs.
Customer (portal)	Sees their own cleans, invoices and requests in the customer portal, if you use it.

Cleaners have a focused, work-only view. They do not see business figures, invoices, payments, other customers, management notes or other cleaners' work, and they see access details only for their own assigned cleans.

21. Common situations

A cleaner cannot see a job in My Jobs. Check in the Calendar that they are assigned to it, and that it is not cancelled. Today shows only today's cleans; later cleans are under Upcoming (next 90 days).

A job has no cleaner. It shows as **Unassigned** in the Calendar and on the Dashboard. Open it and use **Assign cleaner**. Use **Assignment, Unassigned only** in the Calendar to find them all.

I need to move a clean. Open it in the Calendar and use **Reschedule**. The clean keeps its length unless you change the end. The assigned cleaner is emailed about the new time (if that email is switched on).

A customer asked to move a clean through the portal. Open **Customer Requests, Approve** it, use **View clean to Reschedule** the clean to the agreed time, then select **Mark applied and email customer**. The customer is emailed the confirmed booking.

I changed a plan's cleaner, but existing cleans still show the old cleaner. That is expected: cleans already generated keep their cleaner. Open each one and use **Assign cleaner** (and **Remove** the old cleaner). Cleans generated from now on get the new cleaner.

Regular cleans are missing from the Calendar. A plan creates cleans only when you use **Generate jobs**. Generate the plan through a later date.

A customer's portal shows a past clean as Awaiting update. That clean was never completed or closed. Open it in the Calendar and complete, skip or cancel it, whichever is true.

An hourly invoice has the wrong length. The invoice uses the clean's booked length, not the cleaner's clock time. Before invoicing, correct the clean with **Edit**. If the draft already exists, edit its line; if it is issued and has no payments, void it and create it again.

A cleaner cannot complete because checklist items remain. They can finish the items, or tap **Complete anyway**. The clean is then recorded as completed with required items incomplete, which you can see on the clean.

A customer has not paid. The invoice stays in **Outstanding**. Check it under **Invoices**. When they pay, open the invoice and **Record payment**.

An invoice is overdue. It is shown as **Overdue** and listed in **Needs attention**. If overdue reminders are switched on, the customer is reminded 1, 7 and 14 days after the due date. Contact them as you normally would.

A customer request needs action. Open **Customer Requests** (or **Review** on the Dashboard), decide, make any approved change yourself, then **Mark applied**.

A cleaner reported no access. You are alerted, and the Dashboard lists it until you make a charge decision. Open the clean and, under **Billing**, use **Charge decision to Charge** or **Waive**. If the visit needs redoing, book or reschedule a clean.

A cleaner reported an issue. Open the clean, read the report under **Reported issues**, add notes if useful, and select **Resolve**.

A page says it couldn't load. Check your connection and select **Try again** (or refresh the page). MooTidy shows an error rather than an empty list or £0.00, so do not treat a failed page as "nothing there".

I saved a change but it doesn't show. Refresh the page. If the change is still missing, the save did not go through: make the change again.

I recorded a payment on the wrong date or for the wrong amount. Recorded payments cannot currently be edited or removed. Check the amount and payment date before saving. If you record a payment incorrectly, do not enter another payment to compensate for it. Contact your MooTidy support contact for help before making further changes.

22. What v0.1 does not include

MooTidy v0.1 concentrates on running cleans and getting paid. It does not yet include:

- expense tracking or profit reporting;
- cash-flow, accountant or VAT reporting, or a VAT workflow;
- data export;
- PDF invoices;
- taking card or online payments (payments are recorded, not processed);
- adding team members yourself from inside MooTidy;
- full staff rota, holiday approval or HR records;
- uploading a logo (use a logo link instead);
- rich text formatting in notes and descriptions;
- a choice between the 12-hour and 24-hour clock (MooTidy uses the 12-hour clock with AM and PM);
- changing the cleaner on many generated cleans at once;
- agreeing a different price for one clean from Job Detail.

23. Quick reference

Owner or manager: a typical day

1. Open the **Dashboard**.
2. Work through **Needs attention**: assign cleaners, review requests, resolve issues and no-access decisions.
3. Check **Today's cleans** and the **Next 7 days**.
4. Follow up new **Leads**; convert the ones who say yes, and add their property and plan.
5. **Generate jobs** for plans when you need cleans further ahead.
6. Invoice completed cleans (**Create invoice**, then **Issue invoice**).
7. **Record payment** as money arrives.

Cleaner: a typical day

1. Open **My Jobs** and check **Today**.
2. Tap your next clean and read the notes and priorities.
3. Tap **I've arrived**, then **Start clean**.
4. Tick off the **Checklist**.
5. Tap **Complete job** (or **Report issue** or **No access** if needed).
6. Move on to the next clean.

Key definitions

Term	Meaning
Revenue	Money actually received in the chosen period.
Outstanding	What customers currently owe on issued and part-paid invoices.
Overdue	The part of Outstanding past its due date.
Unassigned	A clean with no cleaner yet.
Draft invoice	Prepared, numbered, not yet issued or owed.
Booked length	A clean's scheduled start to end. Hourly invoices use it.
Awaiting update	In the customer portal: an earlier clean that has not been completed or closed yet.
Confirm it is you	The password check before access details are shown. It lasts 5 minutes.

Appendix: traceability

This appendix links each part of the manual to the product design and to the evidence behind it. It is for the release record, not for day-to-day use.

- The automated acceptance evidence for v0.1.0-rc.2 (docs/testing/MooTidy_Pre_Pilot_Acceptance_v0.1.0-rc.2.md) still covers behaviour that did not change in rc.3.
- The rc.3 changes are traced to the founder UAT findings in docs/testing/MooTidy_Founder_UAT_v0.1.0-rc.2.md , each fixed in production and human-verified before the rc.3 freeze:

Manual section	rc.3 change	UAT finding
2 Getting started; 17 Notifications	12-hour clock with AM/PM everywhere, including emails	UAT-F20
3 Dashboard	Needs attention: one row per clean with its reason and a link	UAT-F09
6 Properties; 10 My Jobs	Password confirmation for access details, 5 minutes, never preloaded	UAT-F01
8 Recurring service plans	Generate jobs names plans and reports what it created	UAT-F02
8 Recurring service plans; 17	The plan's cleaner applies to newly generated cleans; Regular work assigned email	UAT-F04 (UAT-F05 deferred)
9 Calendar and scheduling	Confirmations after actions; reschedule keeps the length; one duration per clean; rescheduled clean shows once	UAT-F03, UAT-F06, UAT-F07
9 Calendar and scheduling	A one-off clean takes the service's defaults	UAT-F23
9 Calendar and scheduling	Billing links to the clean's invoice	UAT-F10
13 Customer Requests; 18 Customer Portal	Structured reschedule requests; the clean named; booking confirmation email	UAT-F14, UAT-F15, UAT-F16
14 Invoices	Hourly invoices use the booked length; extra Confirm price step	UAT-F21 (UAT-F22 deferred)
18 Customer Portal	Business-clock times and dates; plain payment methods; invitation clarity; no portal routing to business setup	UAT-F08, UAT-F11, UAT-F12, UAT-F17, UAT-F18, UAT-F19
18 Customer Portal	Exactly one list per clean; Awaiting update and In progress	UAT-F24, UAT-F25
18 Customer Portal	Property Update always linked to one of the customer's own properties	UAT-F26

The section map below is unchanged from rc.2:

Manual section	Product Design v0.5	Acceptance evidence
1 Welcome	2 Product vision; 3 Current release; 4 v0.1 product boundary	5.2 Core business journey
2 Getting started	6 Roles and access; 19 Release model	5.1 Release integrity; 5.8 Auth, bootstrap
3 Dashboard	3 Current release (Revenue, Outstanding)	5.5 Finance (Revenue, Outstanding, Overdue); 5.9 Error states
4 Leads	Lead to customer conversion	5.2 (Leads, conversion)
5 Customers	Customers	5.2 (customers)
6 Properties	Customers; sensitive property access	5.2 (properties, access details); 5.8
7 Services	7 Service catalogue	5.2; 5.5 (service descriptions)
8 Recurring service plans	Recurring plans; scheduling	5.2 (plans, job generation)
9 Calendar and scheduling	Native scheduling	5.2 (scheduling, assignment); 5.3 Time zones
10 My Jobs	Cleaner execution	5.4 Cleaner workflow (including completion)
11 My Cleaner Profile	Roles; availability	5.4 (Cleaner Profile, notes privacy)
12 My Availability	Availability	5.4 (Availability)
13 Customer Requests	Customer portal core	5.7 Customer portal
14 Invoices	Finance administration	5.5 (invoices, numbering, presentation)
15 Recording payments	Finance administration	5.5 (payments); 5.3 (payment date)
16 Finance at a glance	Finance administration; status summary	5.5; 5.10 Deferred boundary
17 Notifications	Notifications	5.6 Notifications
18 Customer Portal	Customer portal core (off in production)	5.7
19 Business Settings	Release model; time zones	5.5 (settings); 5.3
20 Roles and access	6 Roles and access	5.8 Authorization and isolation
21 Common situations	(operational guidance)	5.4, 5.5, 5.9
22 What v0.1 does not include	21 Status summary (future and deferred)	5.10 Deferred boundary