QUICK START GUIDE

Welcome to Janitorial Manager!

Below are steps to help you get started.

Create New User

1. Select **Account** from the menu bar.
2. Select the **Users** tab.
3. Select the **Add New User** button.
4. Complete the user data fields
5. Select **Save**.

Reset User's Password

6. Select the **Reset Password** button. An email will be sent to the user prompting them to select a new password.

Import Clients

1. Select the **Clients** tab from the menu bar.
2. Select **Import** from the drop down menu.
3. Select **Instructions**.

Depending on your browser….

FireFox:

4. In the **Open Client Import Template** box, select either **Open with Excel** or **Save File.** If you select open it will open the document in Excel. If you save the document, you have to locate and open it.

Chrome:

5. The **Client Import Template** will download and appear on the download bar at the bottom of your browser window. Click to open the file in Excel.

Internet Explorer:
(Not Recommended)

6. In the **Internet Explorer** download window, select **Open** or **Save**. If you select open it will open the document in Excel. If you save the document, you have to locate and open it.

Import Clients (Cont.)
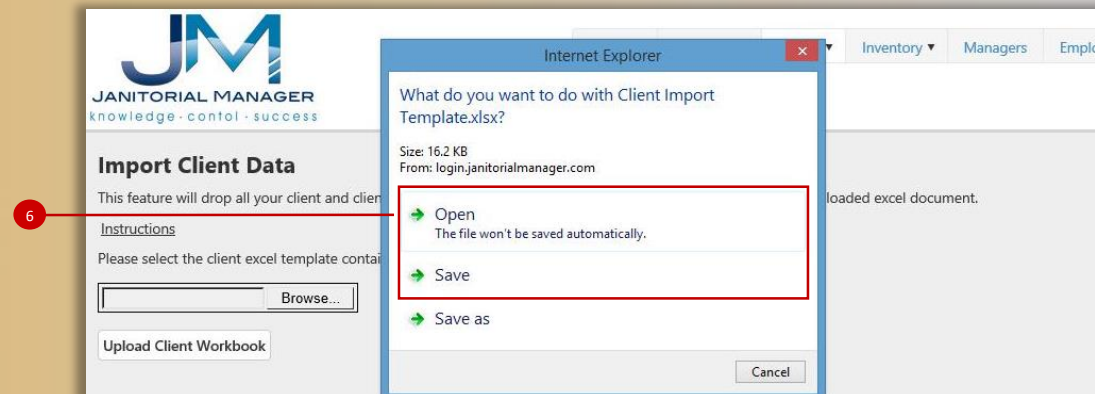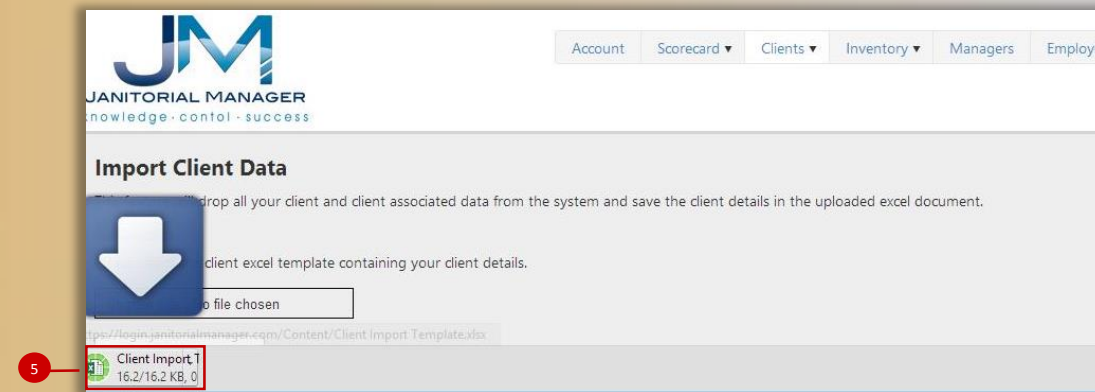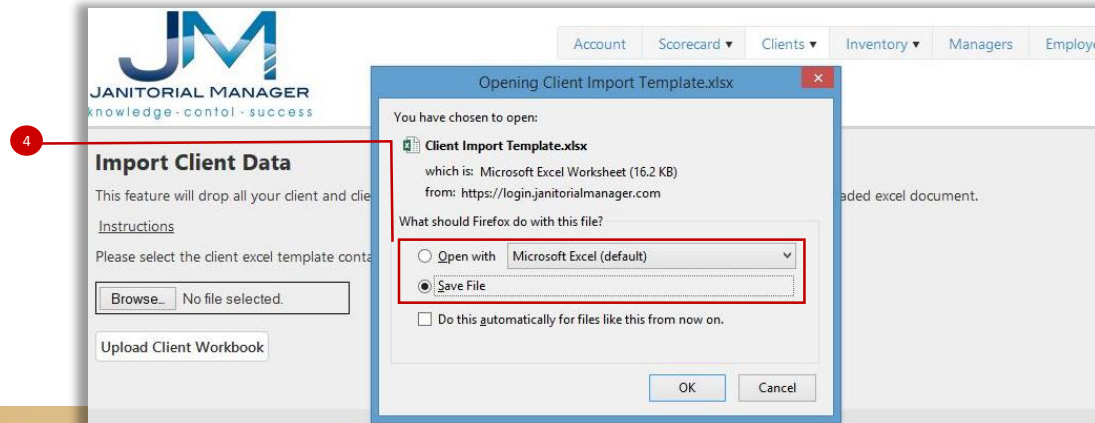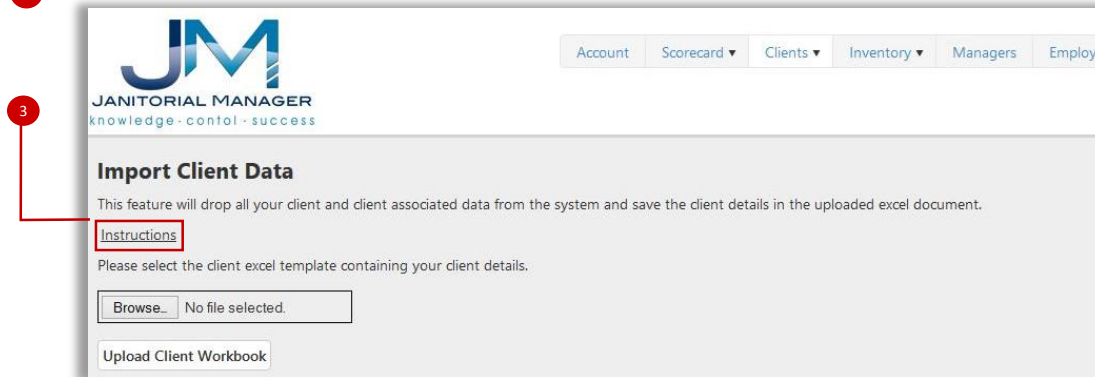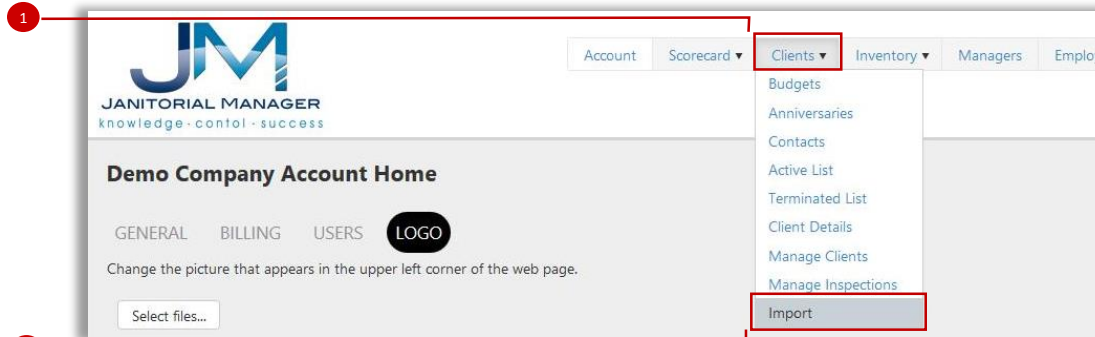
1. Carefully read the **Client Import Template Instructions**.
2. Select the **Data** tab at the bottom of the worksheet. Fill in all required data fields.
3. **Do not** change heading titles or tab names.
4. When client data entry is complete, save the worksheet.

Client Import Template Instructions

This template is meant to help you format your client information in such a way that Janitorial Manager can import appropriately.

1. Using the field definitions below, add rows to the Data sheet. Do not change the name of this sheet.
2. Upload the saved workbook on Janitorial Manager import data page.

Frequently Asked Questions

|	
What is a field?	A field is a piece of information Janitorial Manager will store about your client.
What if we don't have a matching field in our current system?	If the field is not required, just leave it blank. White spaces and blanks are skipped during the import process. If you have questions on required fields, please contact customer support.
Why am I missing a client after the import process?	We are sorry for the inconvenience! There are many reasons why the client may not have been saved. To start, double check that each field in the client row is the proper format and is placed in the proper column position. Please contact customer support if you continue to experience issues adding your clients.
What does 'Text - Specific Values' mean?	These fields require specific text values to work correctly. Client Type and Primary Preferred Contact Method are examples. The system will not accept just any text value, we require specific values for these cases.
I only have one address, which fields should I use?	If your client's address and billing address are the same, fill in the first four address fields located in positions 5,6,7 and 8 and put the value of true in position 8. We'll copy the address details into the client's billing address details so you don't have to provide them twice.

Field	Required?	Column Position	Format	Restrictions	Specific Values
Id	Yes	1	Number		
Name	Yes	2	Text	Max 500 chars	
Type	Yes	3	Text - Specific Values	Max 25 chars	Billable / TenantOnly
Anniversary Date	Yes	4	DateTime		
Street Address	Yes	5	Text	Max 255 chars	
City	Yes	6	Text	Max 255 chars	
State	Yes	7	Text	Max 50 chars	
Zip Code	Yes	8	Text	Max 10 chars	
Billing Address Same	Yes	9	Boolean	true/false	
Billing Street Address	Yes	10	Text	Max 255 chars	
Billing City	Yes	11	Text	Max 255 chars	
Billing State	Yes	12	Text	Max 50 chars	
Billing Zip Code	Yes	13	Text	Max 10 chars	
Monthly Rate	Yes	14	Number		
Monthly Inspection Required	No	15	Boolean	true/false	
Paper Monthly Budget	No	16	Number		
Floor Monthly Budget	No	17	Number		
Window Monthly Budget	No	18	Number		
Lawn Monthly Budget	No	19	Number		
Other Monthly Budget	No	20	Number		
Weekly Hours Budget	No	21	Number		
Percent Supply Budget Target	No	22	Number / Percent		
Budget Notes	No	23	Text	Max 5000 chars	
Inspection Notes	No	24	Text	Max 5000 chars	
Use Inspection Key	No	25	Boolean	true/false	
Location Number	No	26	Text	Max 255 chars	

Instructions | **Data** | Sheet3

Client Import Template (2).xlsx - Excel

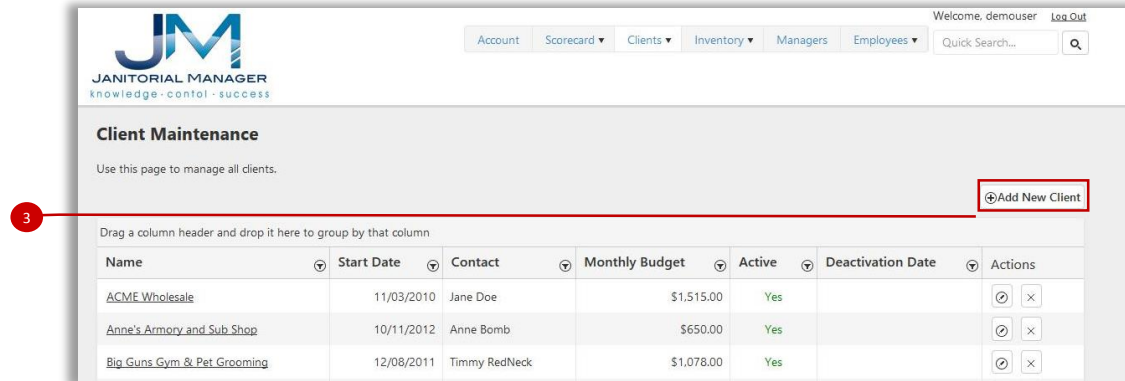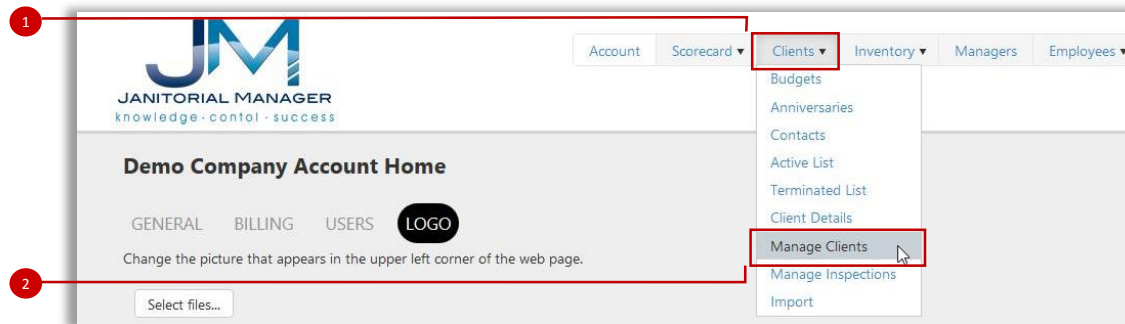|	Id	Name	Type	Anniversary Date	Street Address	City	State	Zip Code	Billing Address Same	Billing Street Address	Billing City	Billing State	Billing Zip	Monthly Rate	Monthly Inspection Required	Paper Monthly
	1	ABC Company	Billable	4/1/2008	101 Main Stree	Mainton	OH	45840	TRUE	101 Main Street	Mainton	OH	45840	1000	TRUE	
	2	XYZ Company	TenantOnly	5/8/1986	111 South Mair	Bluffton	MI	78896	FALSE	123 West Main Street	Toledo	OH	48972	5000	TRUE	
	3	My Company	Billable	5/1/1987	111 North Mair	Findlay	OHIO	97838	FALSE	124 North Main Street	Tiffin	OH	99288	2500	FALSE	

Instructions | **Data** | Sheet3

Import Clients (Cont.)

1. Select the **Clients** tab from the menu bar.
2. Select **Import** from the drop down menu.
3. Select the **Browse** button.
4. Locate and select the **Client Import Template**. Select open.
5. The correct file name should be displayed next to **Browse** button.
6. Select **Upload Client Workbook.** Your client files will be uploaded in to JM.
7. Select **Manage Clients** under the **Clients** tab.
8. Make sure to review your uploaded client files for accuracy.
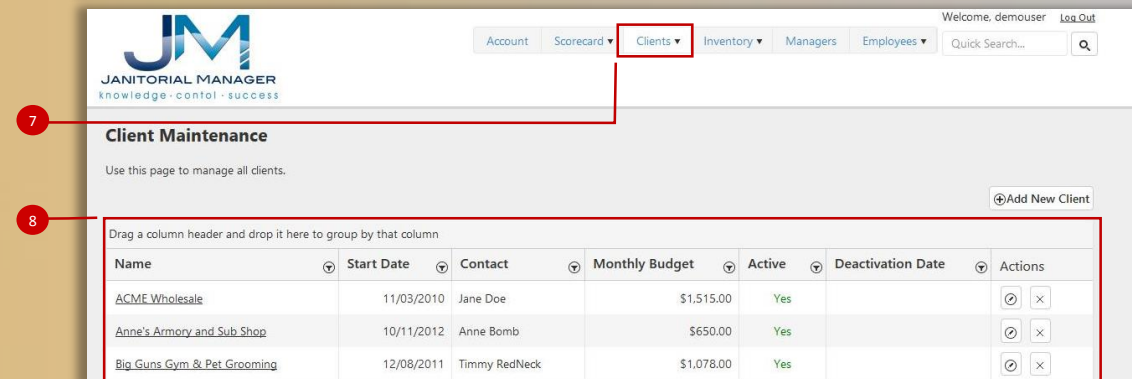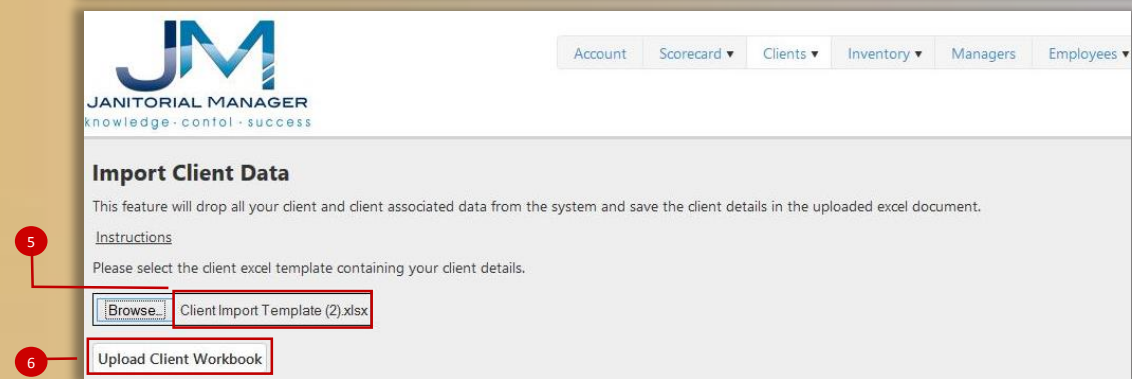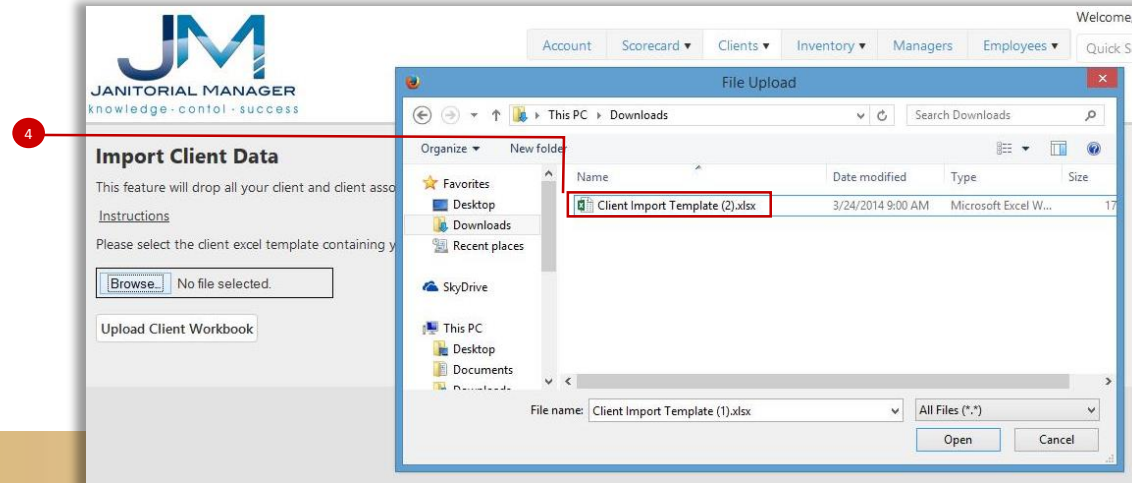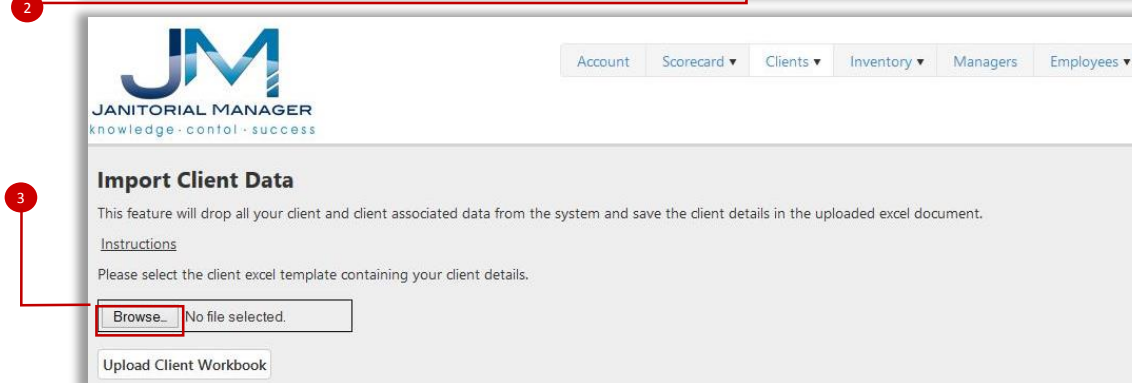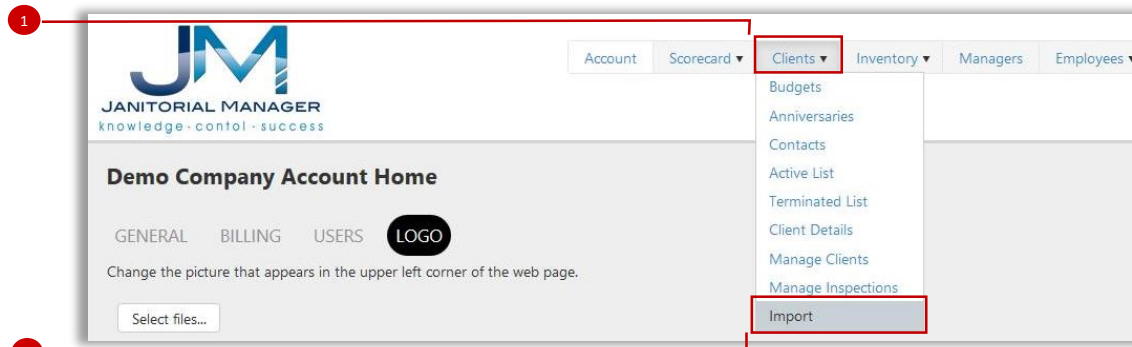
Add New Client

1. Select the **Clients** tab from the menu bar.
2. Select **Manage Clients** from the drop down menu.
3. Select **Add New Client**.
4. Fill Client fields.
5. Select **Save**.

Demo Company Account Home

GENERAL   BILLING   USERS   LOGO

Change the picture that appears in the upper left corner of the web page.

Select files...

Clients menu:
Budgets
Anniversaries
Contacts
Active List
Terminated List
Client Details
Manage Clients
Manage Inspections
Import

Client Maintenance

Use this page to manage all clients.

⊕ Add New Client

Drag a column header and drop it here to group by that column

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
ACME Wholesale	11/03/2010	Jane Doe	$1,515.00	Yes		⊘ ✕
Anne's Armory and Sub Shop	10/11/2012	Anne Bomb	$650.00	Yes		⊘ ✕
Big Guns Gym & Pet Grooming	12/08/2011	Timmy RedNeck	$1,078.00	Yes		⊘ ✕

Client Maintenance

Enter the client details and click the save button when finished.

⊘ Save   < Back

General Information

Name

Type — Choose Type ▼   Start Date — 3/24/2014

Notes

Budget Information

Rate — $0.00   Paper — $0.00
Floor — $0.00   Window — $0.00
Lawn — $0.00   Other — $0.00
Monthly Total — $0.00   % Supply Usage Goal — 0.00

Primary Contact Information

First Name   Last Name
Email Address   Fax
Office Phone   Extension
Emergency Contact Notes

Inspection Information

Monthly Inspection ☐
Spare Key ☐
Alarm Code   Location Number

Address Information

Street Address
City   State   Zip

Secondary Contact Information

First Name   Last Name
Email Address   Fax
Office Phone   Extension
Emergency Contact Notes

Building Information

Building Name   Budgeted Wkly Hrs — 0.00

Billing Information

Street Address   Same As Above ☐
City   State   Zip

Import Employees

1. Select the **Employees** tab from the menu bar.
2. Select **Import** from the drop down menu.
3. Select **Instructions**.

Depending on your browser….

FireFox:

4. In the **Open Employee Import Template** box, select either **Open with Excel** or **Save File.** If you select open it will open the document in Excel. If you save the document, you have to locate and open it.

Chrome:

5. The **Employee Import Template** will download and appear on the download bar at the bottom of your browser window. Click to open the file in Excel.

Internet Explorer:
(Not Recommended)

6. In the **Internet Explorer** download window, select **Open** or **Save**. If you select open it will open the document in Excel. If you save the document, you have to locate and open it.

Import Employees (Cont.)

1. Carefully read the **Employee Import Template Instructions**.
2. Select the **Data** tab at the bottom of the worksheet. Fill in all required data fields.
3. **Do not** change heading titles or tab names.
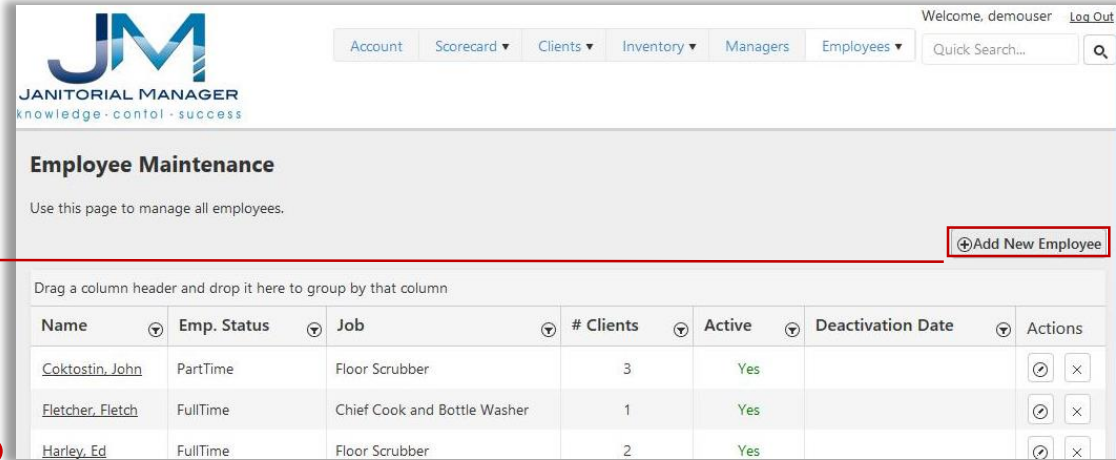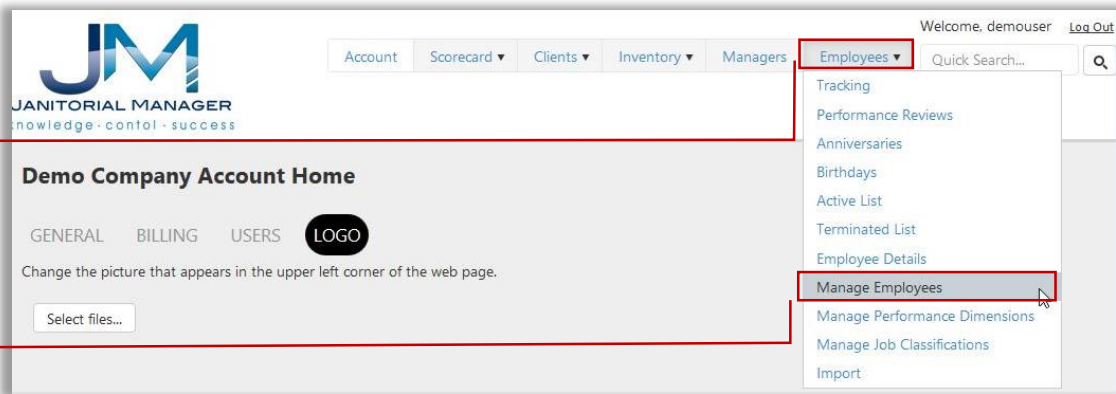4. When client data entry is complete, save the worksheet.
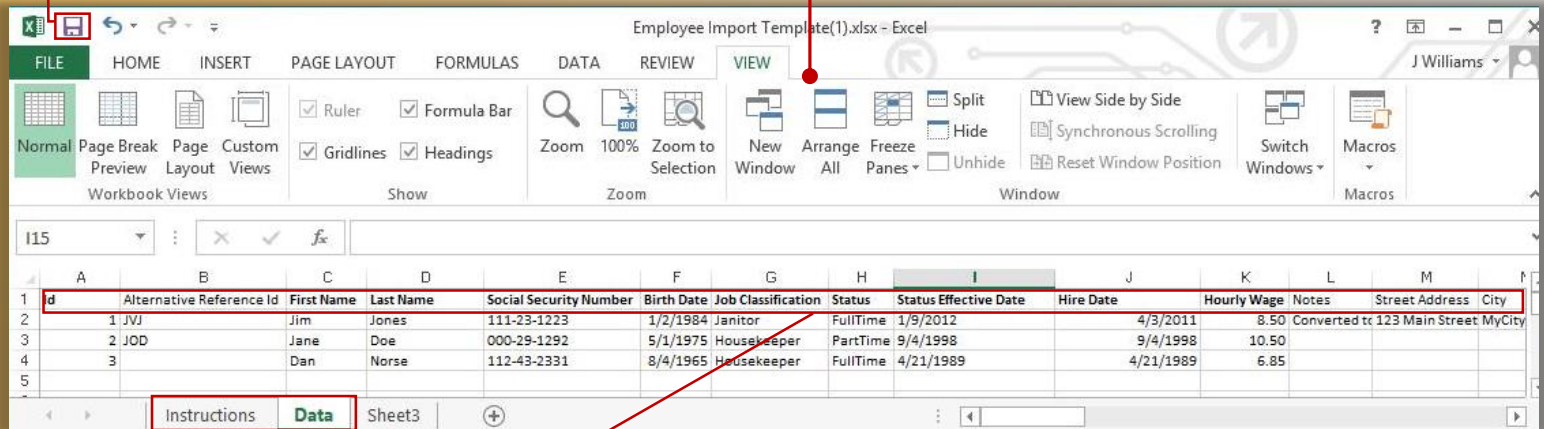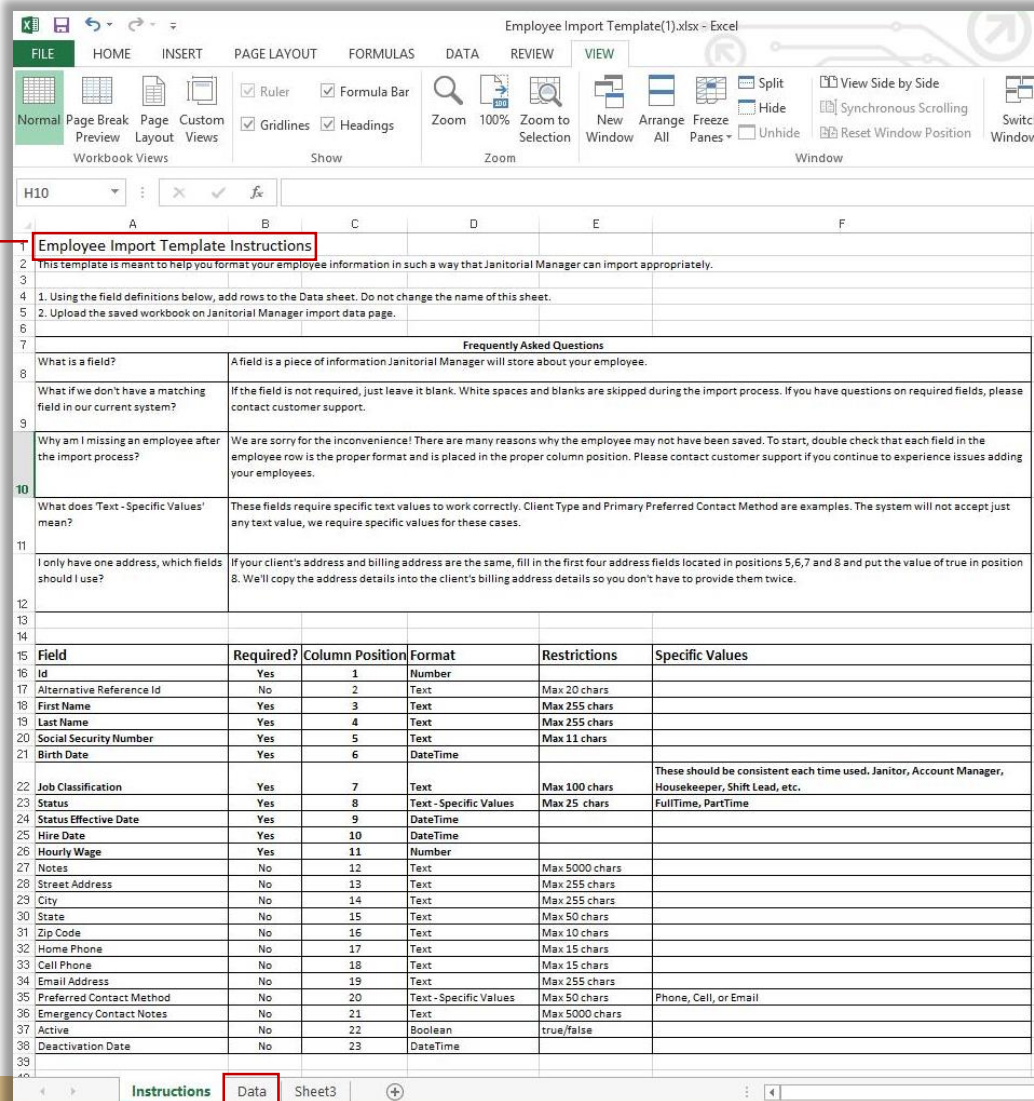
Import Employees (Cont.)

1. Select the **Employees** tab from the menu bar.
2. Select **Import** from the drop down menu.
3. Select the **Browse** button.
4. Locate and select the **Employee Import Template**. Select open.
5. The correct file name should be displayed next to **Browse** button.
6. Select **Upload Employee Workbook.** Your client files will be uploaded in to JM.
7. Select **Manage Employee** under the **Employees** tab.
8. Make sure to review your uploaded Employee files for accuracy.
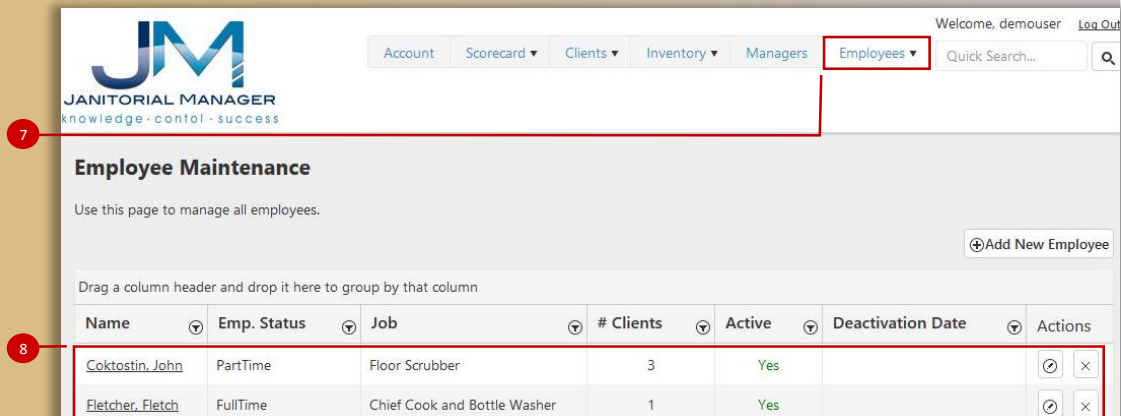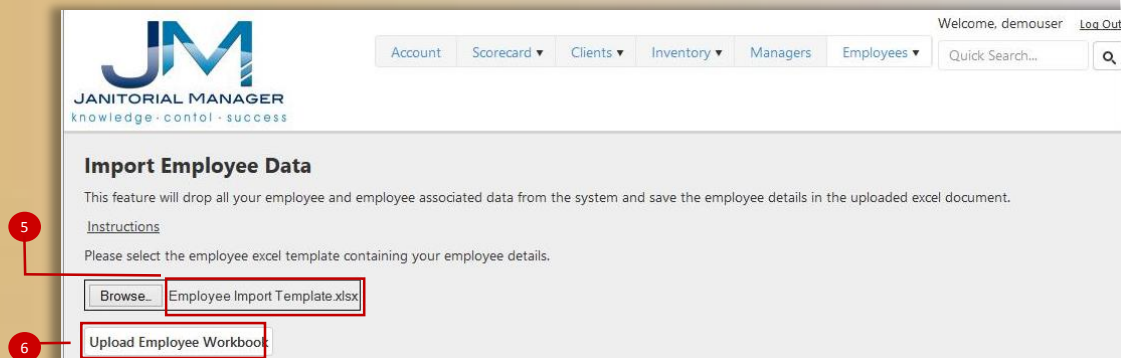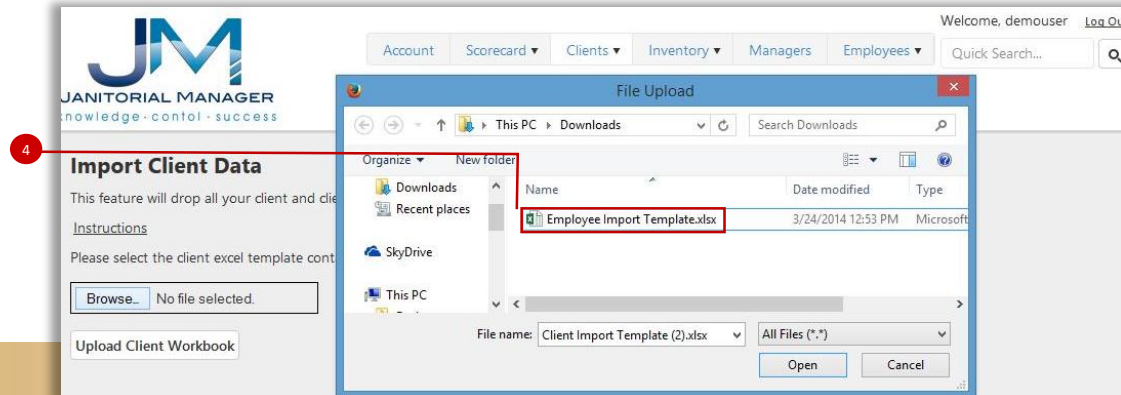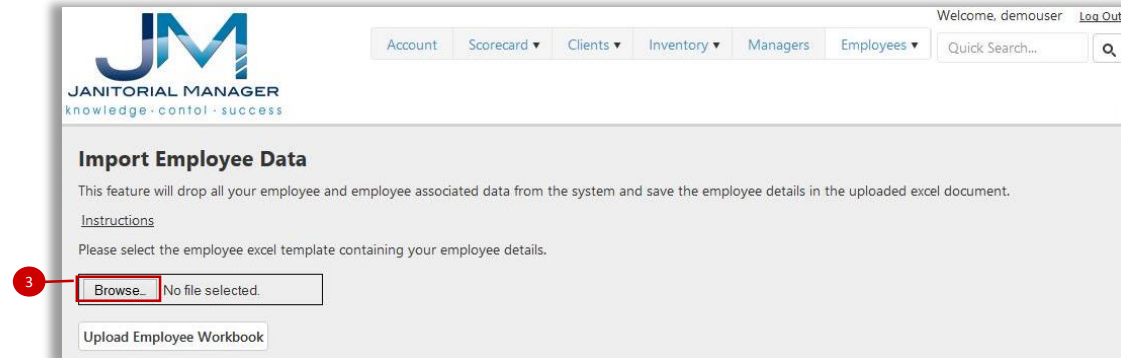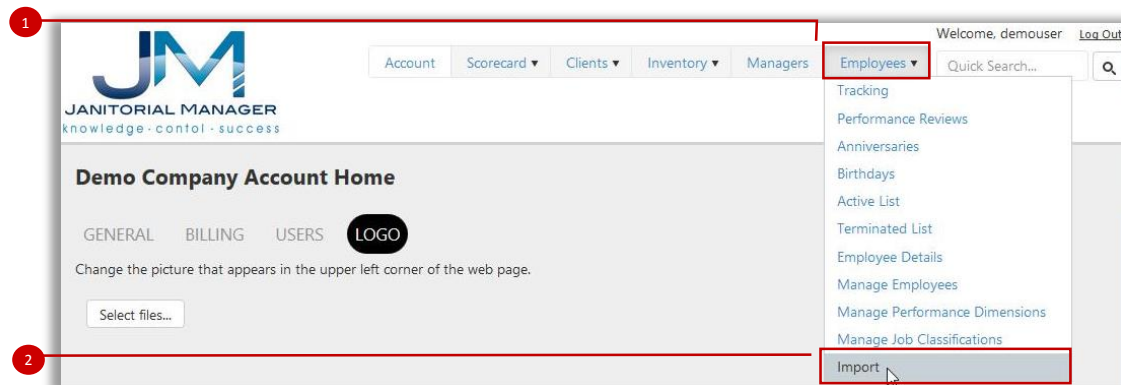
Add New Employee

1. Select the **Employees** tab from the menu bar.
2. Select **Manage Employees** from the drop down menu.
3. Select **Add New Employee**.
4. Fill Employee fields.
5. Select **Save**.

Additional Resources

Sign up for Janitorial Manager's live web-based training program at www.JanitorialManager.com.

For Customer Support, click on the "Support" link, or email support@JanitorialManager.com