Janitorial Manager

User Manual

Updated 8/22/2016

Return to Table Of Contents

Table of Contents

Initial Janitorial Manager implementation Checklist 5

Getting to know the Janitorial Manager (JM) User Interface 6

General user interface 6

Quick Search: 9

Sorting tabular information. 10

Company Setup 13

Setup your company's General account information 13

Setup Your Company's Billing Information 14

Add New User 15

User Themes 18

User Roles & Rights 20

Editing Existing Users 22

Reset User's Password 24

Deleting a User 26

Re-Activating a deleted user 27

Customize JM with your company logo 29

Time Keeping Set Up 31

Enabling Timekeeper Features 31

Scenario 1: Currently Using Both JM and Chronotek 32

Employee Synchronization 32

Client Synchronization 35

Scenario 2: Current Chronotek User, New to JM 38

Employee Import from Chronotek 38

Client Import from Chronotek 39

Scenario 3: Existing JM User, New to Chronotek 41

Reviewing Errors 42

Manage Clients 43

Add New Client 43

Import Clients 45

Editing Existing Clients 48

Searching for Existing clients 49

De-activating a Client 55
Re-activating a client 57
Deleting a client 59
Manage Employees 61
Job Classifications 61
Delete Job Classification 62
Edit Job Classification 63
Adding New Employee 64
Import Employees 66
Download the Employee Import Instruction Spreadsheet 66
Populate Employee Data in Import Spreadsheet 67
Upload the Employee Spreadsheet 68
Edit Employee 71
Search for employee 72
Deactivate an Employee 75
Deactivating an Employee Who is an Inspector 76
Re-activate an Employee 77
Employee Tracking 78
Employee Details 80
Employee Details – Client Account Assignment and Training 81
Employee Awards and Recognition 81
Adding a New Employee Recognition Event 82
Employee Attendance Incidents 83
Add Attendance Incident 83
Employee Job Performance Incidents 84
Add Job Performance Incident 84
Employee Performance Reviews 85
Completing a Performance Review 86
Performance Reviews - At a Glance 87
Employee Anniversaries 88
Employee Birthdays 88
Active Employee List 89

Terminated Employee List 89
Employee Details 90
Identify Client Account Employee Training 90
View Client Account Employee Training 92
View Active Employees 94
Manage Supplies 95
Add Supply Vendors 95
Editing a Supplier 96
Deleting a Supplier 97
Adding a Supply Inventory Item 98
Editing a Supply Inventory Item 99
Deleting a Supply Inventory Item 101
Add New Supply Usage 102
Copying a Supply Usage Record 105
Editing a Supply Usage Record 107
Printing a Pick List 109
Delete a Supply Usage Record 110
Sorting Supply Usage Records 111
Inspections 112
Areas & Steps 112
Create a New Inspection Template 114
Schedule Recurring Inspections 118
Edit Inspections 119
Change Inspectors 120
Set an Inspection Alert 121
Conduct Inspections 123
Review Inspections 130
Segmentation 132
Create a Segment 132
Delete a Segment 133
Add Clients to a Segment 133
Remove a Client from a Segment 135

Add an Employee to a Segment 136
Remove an Employee from a Segment 137
Add a User to a Segment 138
Remove a User from a Segment 139
Manage Services 140
Add New Service 140
Edit a Service 141
Delete a Service 142
Assign Services to a Client 142
Client Portal 145
Enable the Portal for a Client 145
Enable or Disable Portal Options 147
Portal Users 147
Add a New Portal User 148
Edit Portal User 149
Delete Portal User 150
Reset Portal User Password 150
Assignments 151
Billing 151

Initial Janitorial Manager implementation Checklist

1. Set up your company's account information – Go To Details…
2. Set up your company's billing information – Go To Details…
3. Set up your company's logo – Go To Details…
4. Add users - Go To Details…
5. **STOP!** If you are already a Chronotek user – Go Here…
6. Add Clients – Go To Details…
    - For an initial installation/implementation, you should prepare a bulk import excel spreadsheet containing pertinent information for each client that your company has an existing contract with. Once the spreadsheet has been correctly formatted and populated, it can be bulk loaded into JM to save you time and effort.'
7. Add Employees – Go To Details…
    - For an initial installation/implementation, you should prepare a bulk import excel spreadsheet containing pertinent information for each employee that your company has an existing contract with. Once the spreadsheet has been correctly formatted and populated, it can be bulk loaded into JM to save you time and effort.
    - Any subsequent employee that needs to be added to JM can be added individually at any time.
8. Add Suppliers for all supplies tracked by JM – Go To Details…
9. Add Inventory Supply Items – Go To Details…

Getting to know the Janitorial Manager (JM) User Interface

General user interface

Your JM session will be logged out after 10 minutes of inactivity. If the JM application logs out automatically after this period of inactivity, you will need to log back in to continue your work. It is a good idea to save your work frequently.

The main JM functionality groups or tabs are highlighted below are Account, Scorecard, Inspections,

Work Order, Clients, Inventory, Managers, and Employees.

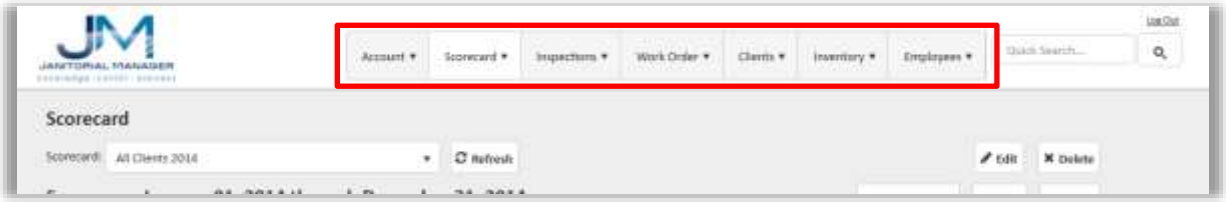


Figure 1

To access one of these particular functionality groups simply click one the tab or dropdown list of the functionality are needed. A brief summary of each main functional area is as follows:

Account:

- Manage Account
  - Company's general account information such as your contact information, location, etc.
  - Company's billing information including credit card and billing address
  - Authorized user setup.
  - Timekeeper integration setup.
  - Logo setup.
- Manage Segments
  - Subdivide Clients, Employees and Users in into logical groups for easy management
- Timekeeper error reporting.

Scorecard:

- Dashboard
  - JM's Dashboard gives you a heads up, customizable view of the health of your company.
- Manage Expense Types
  - Create and manage all expense types. These will be options on the Scorecard reports.

Inspections:

- Manage Inspections
  - Use this page to manage *Scheduled, In-progress, Completed* and *Reviewed* inspections.

- Review Inspections
    - Use this page to review completed inspections. Expand the rows, review the details and mark the inspection as reviewed.
- Manage Templates
    - *Templates:* Displays a list of inspection templates.
    - *Template Detail:* Use this page to edit template details, including what steps are displayed on the inspection template.
    - *Areas & Steps*: An inspection template may contain one or more areas. An area represents a collection of related steps to perform during the inspections.

Work Order:

- Displays *Quoted, Scheduled* and *Completed* Work Orders
- Create new Work Orders

Clients:

- Portal Activity – Track client communications
    - Filter by Segment, Client, Type, an Status
    - Manage Alerts
- Budgets - Shows all active client budgets.
- Anniversaries - Shows client anniversaries during the selected month.
- Contacts - Shows client contact information for both active and inactive clients.
- Active Clients List - Shows all active clients.
- Terminated Clients List - Shows all terminated clients.
- Client Details
    - General – Shows overview of client details
    - Supplies – Shows supply usage for the selected client.
    - Recent Inspections – Shows inspection results for the selected client.
    - (Time) – Shows labor data as reported by time keeping system (Requires a Chronotek account).
- Manage Clients – Manage, edit or deactivate/activate all clients.
    - Setup and edit Client records.
    - Manage Services assigned to each Client.
    - Manage Portal settings for Client.
    - Manage Portal Users.
    - Manage Employee Assignments.
- Manage Services – Master list of Services offered.
- Generic Import – Provides a pre-formatted spreadsheet for INITIAL client data import only. Do not use for ongoing client data input or for timekeeping system data import.
- Chronotek Import – Use to import Client data from Chronotek time keeping system into JM.

Inventory:

This tab provides access to managing your company's janitorial products inventory.

- Supply Tracking – Track supply usage by client.
- Manage Suppliers – Manage the master list of suppliers.
- Manage Supply Items – Manage master list of supplies.
- Generic Supply Item Import – Import Supply list.
- Manage Supply Usage – Record supplies used by client.

Employees:

This tab provides access to managing your company's employees.

- Employee Tracking
- Performance Reviews
- Anniversaries
- Birthdays
- Active Employee list
- Terminated Employee list
- Employee Details
    - Details
    - Clients (Assigned)
    - Awards
    - Attendance Incidents
    - Job Performance Incidents
    - Performance Reviews
    - Time (Only available if using Chronotek)
- Manage Employees
- Manage Performance Dimensions
- Manage Job Classifications
- Managers
- Generic Import
- Chronotek Import

Quick Search:

On each JM screen you should find the Quick Search field as shown below. You can enter the name of a client or employee in the field.

Figure 2

After clicking the **Search** button, the search results will be shown as below

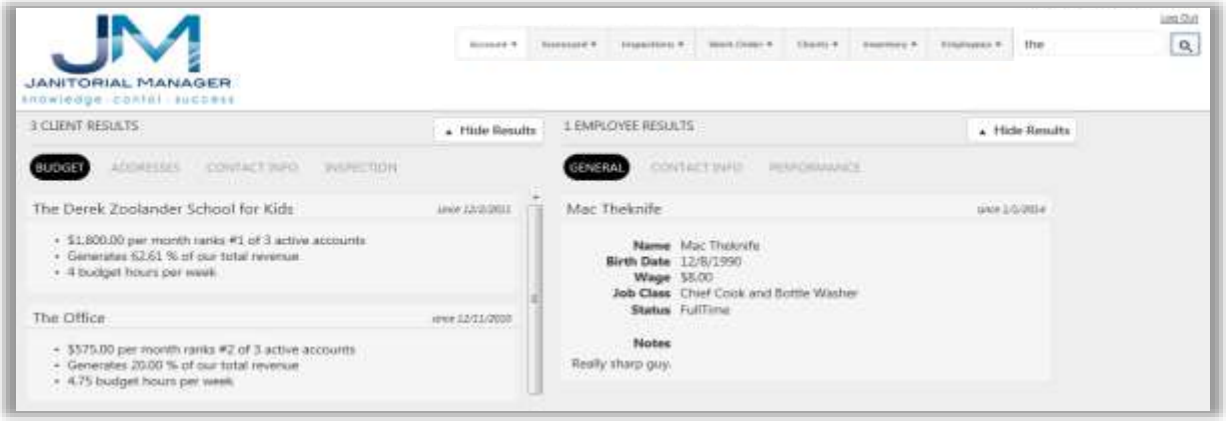


Figure 3

For a client results, you can toggle between the budget, address, contact info and inspection information tabs to see the detailed information.

For employee results, you can toggle between General, contact information, and performance tabs to see the detailed information.

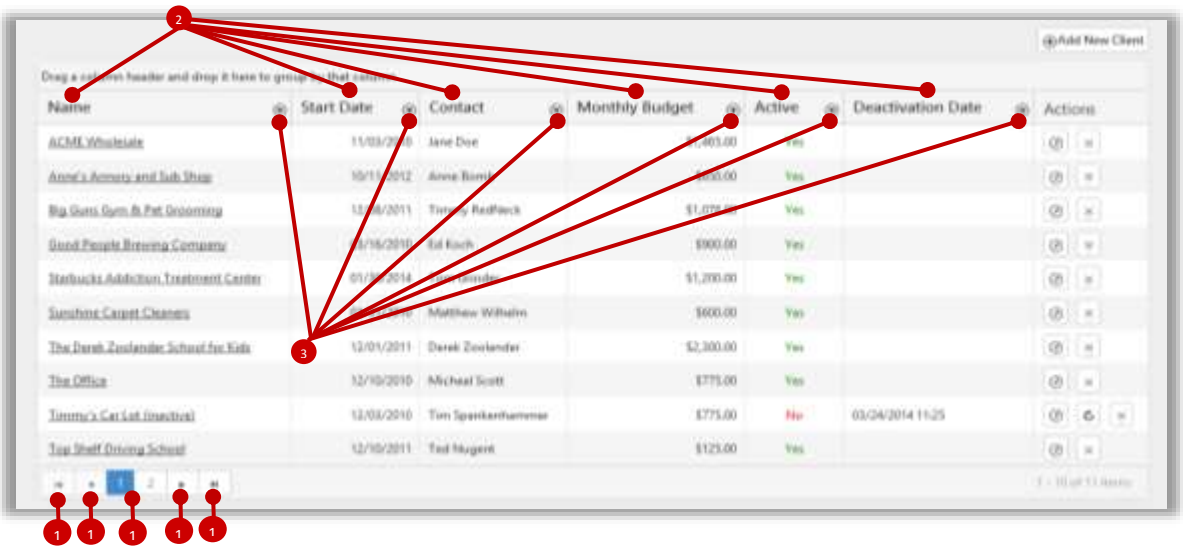


Figure 4

Sorting tabular information.

All data displayed in tables in JM can be sorted and filtered.

1. For multiple pages
    a. You can click on the individual page numbers shown to go to that specific page
    b. You can click on go to the first page
    c. You can click on go to the last page
    d. You can click on the go to the previous page
    e. You can click on the go to next page

2. Any column can be sort in ascending or descending order by clicking on the column name. After clicking on the column name an arrow will be displayed indicating whether the column sort is ascending or descending.

3. Any column can be filtered by clicking on the filter icon as shown above.
    - Click the filter icon in the desired column as shown below.

For example, let's filter the name column as shown below in Figure 5.

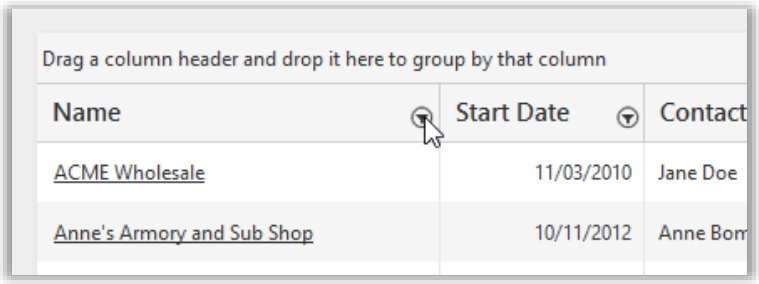


Figure 5

The following form will be displayed.

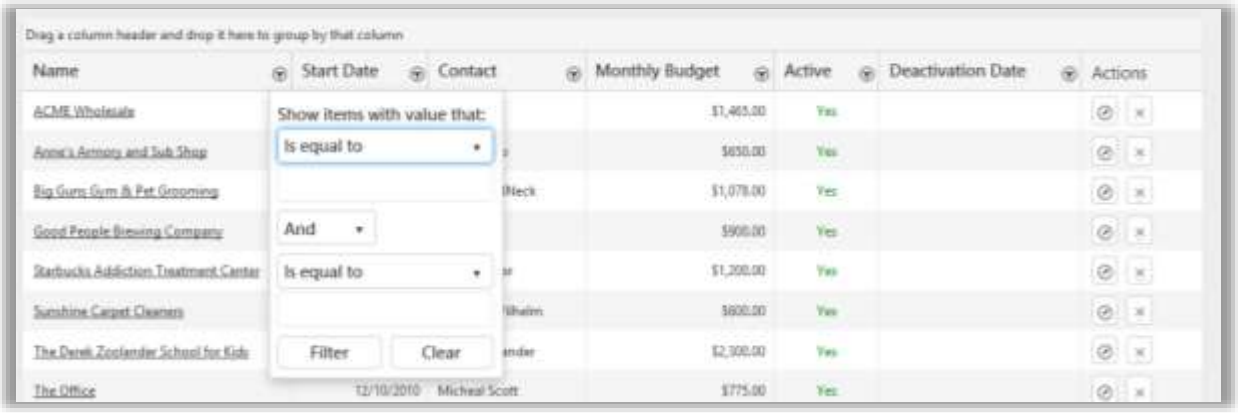


Figure 6

Select the appropriate option depending on your search keyword. For example select "Is equal to".

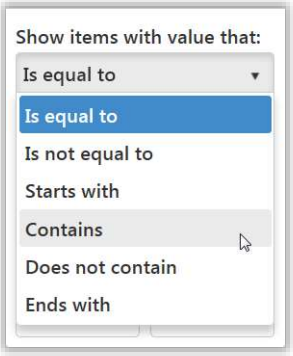


Figure 7

In Figure 7, you can see the entire list of common operators to define the filter. Select the operator the best fits the keyword or phrase that you will enter to define your filter.

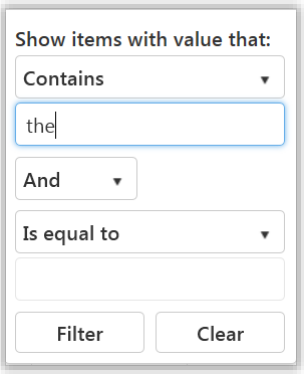


Figure 8

In the value field enter "the"

In Figure 8, you can specify the keyword or phrase that defines the necessary filter.

Additionally, you can define compound operators such as AND or OR.

Click the **Filter** command

Notice that only results “the” in the name are displayed.

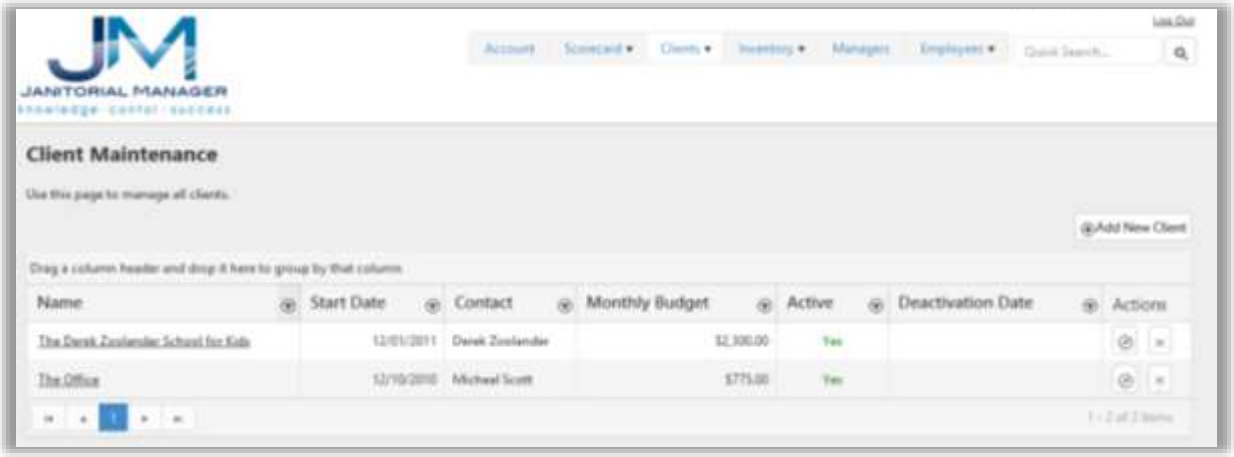


Figure 9

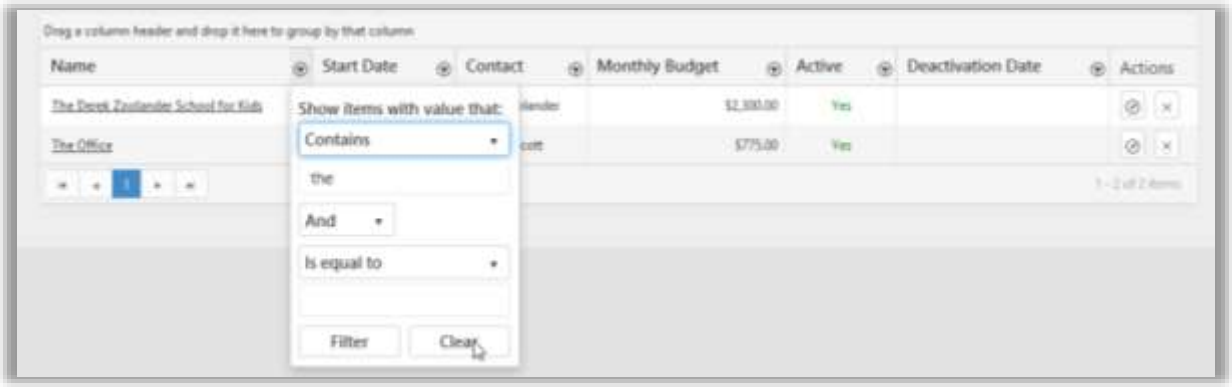


Figure 10

To remove or clear the filter so ALL entries are displayed again, simply click the **Clear** button

Company Setup

Setup your company's General account information

Select Manage Account under the Account tab on the JM application as shown below in Figure 11.

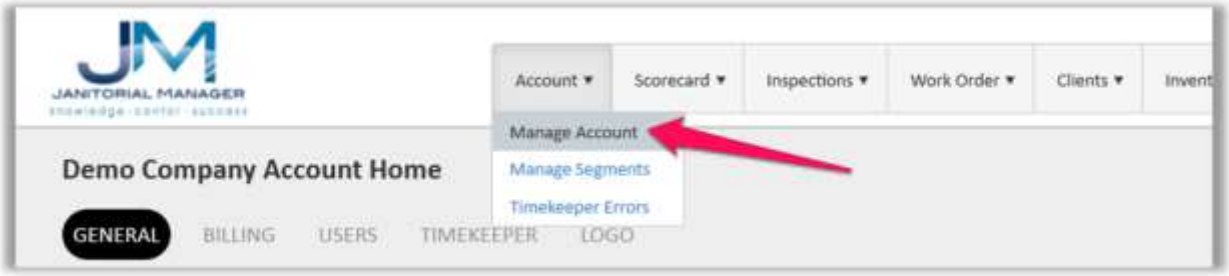


Figure 11

Select the **General** tab as shown below in Figure 12.

Figure 12

If you registered for Janitorial Manage via www.JanitorialManager.com, the General information page should be pre populated with information entered during registrations. Verify that all information is correct and click the **Save** button.

Setup Your Company's Billing Information

Select **Manage Account** under the **Account** tab on the JM application as shown below in Figure 13.

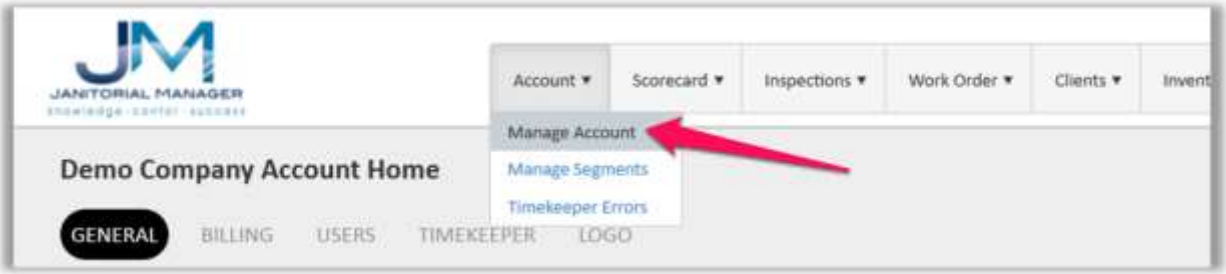


Figure 13

Select the **Billing** tab as shown below in Figure 14.

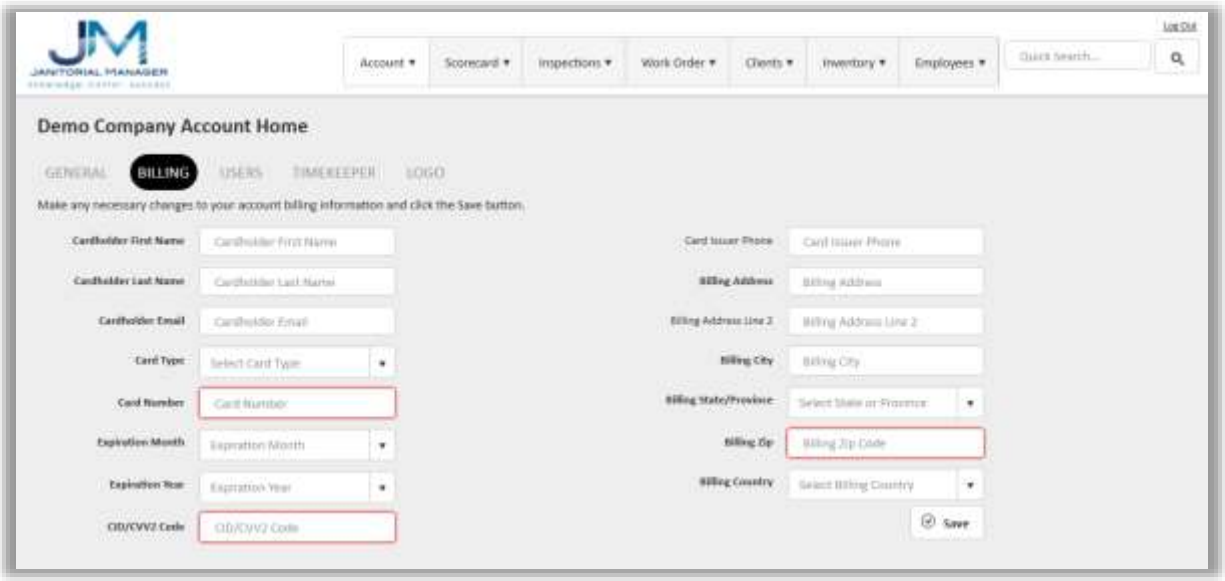


Figure 14

If you registered for Janitorial Manage via www.JanitorialManager.com, the General information page should be pre populated with information entered during registrations. Verify that all information is correct and click the **Save** button.

Add New User

Each authorized user requires an account in Janitorial Manger in order to use the application. A user should be created in JM for each person from your company that will use the JM application. This includes both administrative and general data entry.

Note: In order to create a new user, you must be logged into the JM application as an AdminUser!

Select **Manage Account** under the **Account** tab on the JM application as shown below in Figure 15.

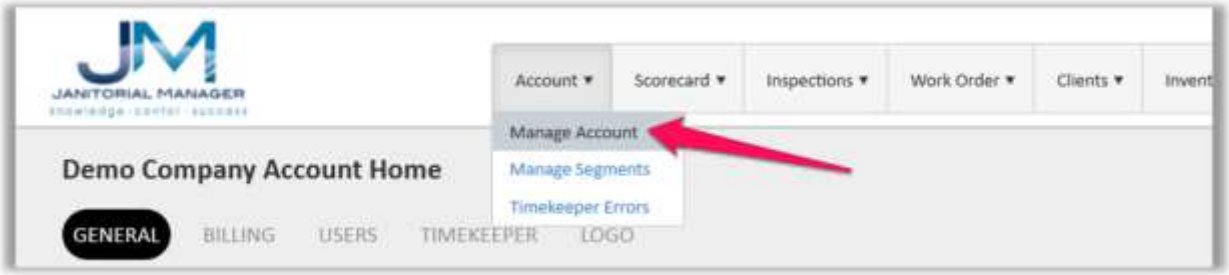


Figure 15

Select the **Users** tab on the JM application as shown below in Figure 16.

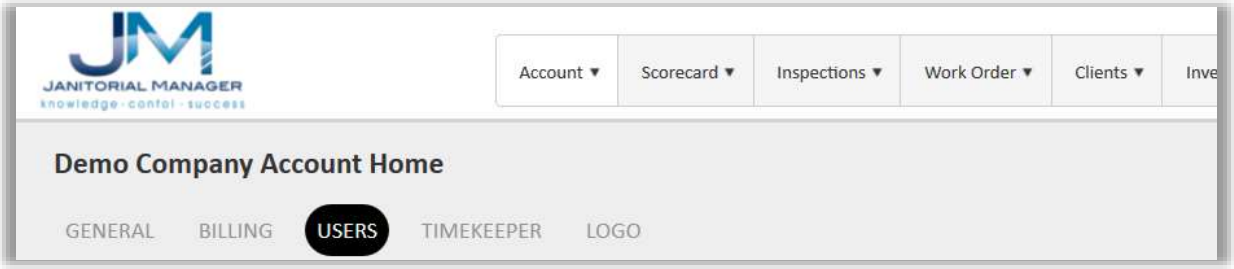


Figure 16

A list of current JM users will be displayed as shown in Figure 17 below.

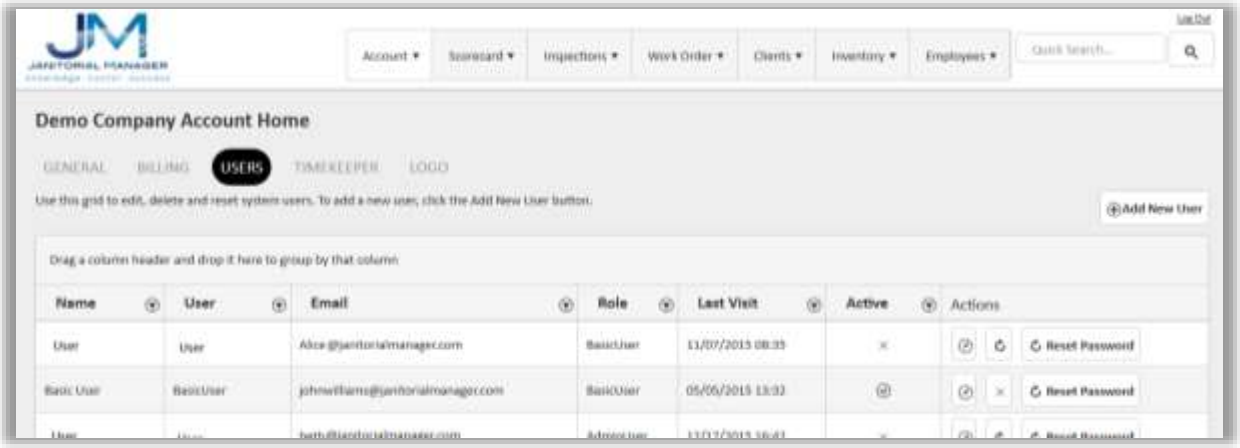


Figure 17

To add a new user, select the **Add New User** button

Add the credentials for the New User. All fields shown in Figure 18 must be filled out with valid information including the first name, last name, login or username, email address and theme.

Note: A valid email address must be provided. A temporary password will be emailed to that user!

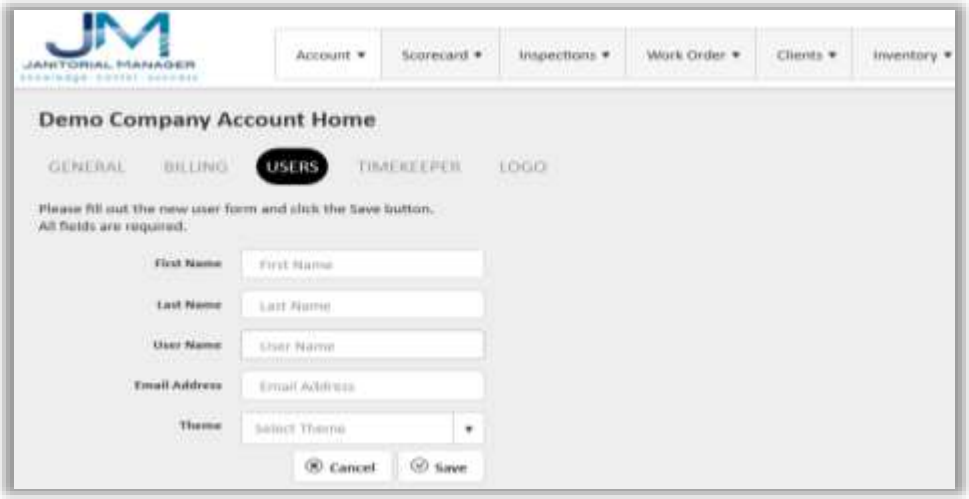


Figure 18

When fields are complete, click Save. The system will automatically send an email to the new user with a temporary password and login instructions. The first time the New User logins in, they will be required to choose a permanent password.

> **Note: A valid email address must be supplied for the user. A temporary password will be emailed to that user when the user is successfully created as shown in Figure 19!**
>
> The user who's email was entered during the user create process will receive a am email from *support@janitorialmanager.com* as shown in Figure 19.

Figure 19

Note: if the user does not immediately receive an email, check to make sure a valid email address was provided or make sure your company's spam filter did not capture or quarantine the email sent. You can verify the supplied email address for the user by editing an existing user… go to details

Figure 20

After supplying the temporary password that was emailed to the new user, a new password, and the new password confirmation, click the **Change Password** button.

Note: the new password MUST have the following characteristics:

- Must contain both upper and lower case letters
- One number (0-9)
- One special character(!,@,#,$,%,^,&,*etc)
- At least 8 characters long

Check the box to accept the terms and conditions and then click the **Continue to Janitorial Manager** button as shown in Figure 21.

Figure 21

Return to Table Of Contents

User Themes

As shown in Figure 25, there are 5 different UI themes that a user can be assigned. The themes are called BootStrap, Default, Silver, Uniform, and Flat. Changing a theme simply changes the color scheme; it does not change the function of the system

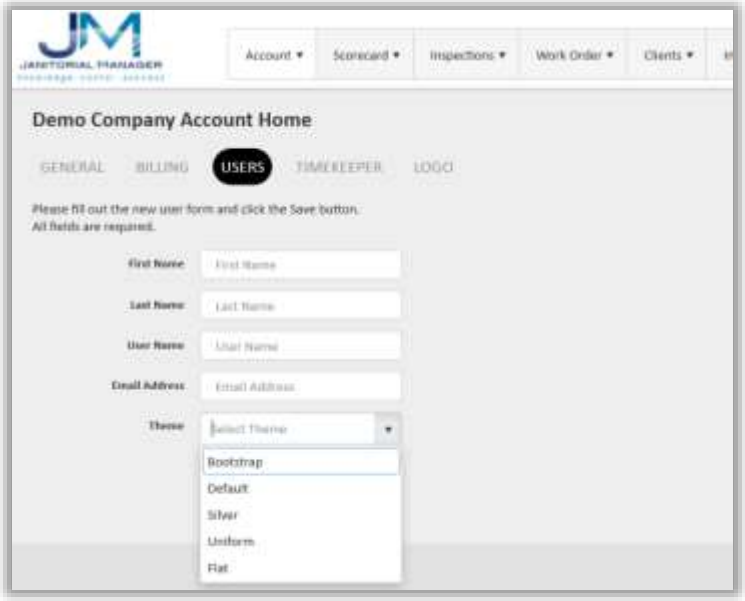


Figure 22

Figures 23-27 give a sample screenshot of each of the possible themes.

Bootstrap Theme

Figure 23

Default Theme

Figure 24

Silver Theme

Figure 25

Uniform Theme

Figure 26

Flat Theme

Figure 27

User Roles & Rights

On the Users page, select Edit User for the desired user as shown in Figure 28.

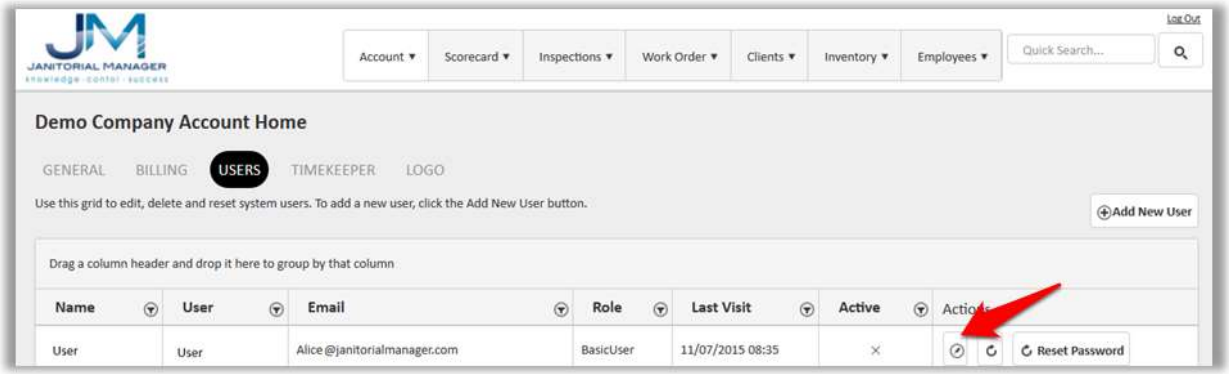


Figure 28

Select the Security tab under the user information.

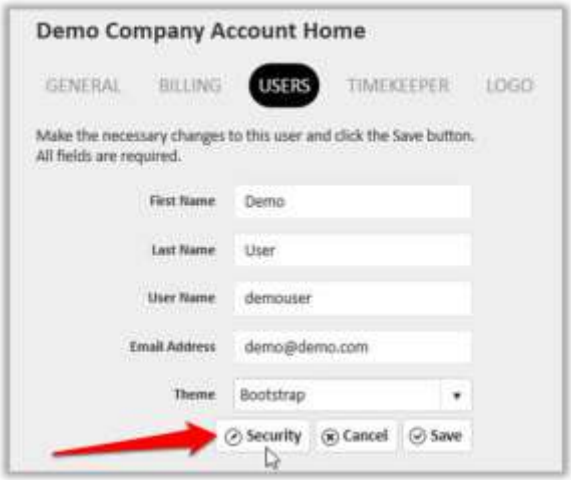


Figure 29

Check the boxes next to functions that you wish to assign to the current User. Click Save when finished.

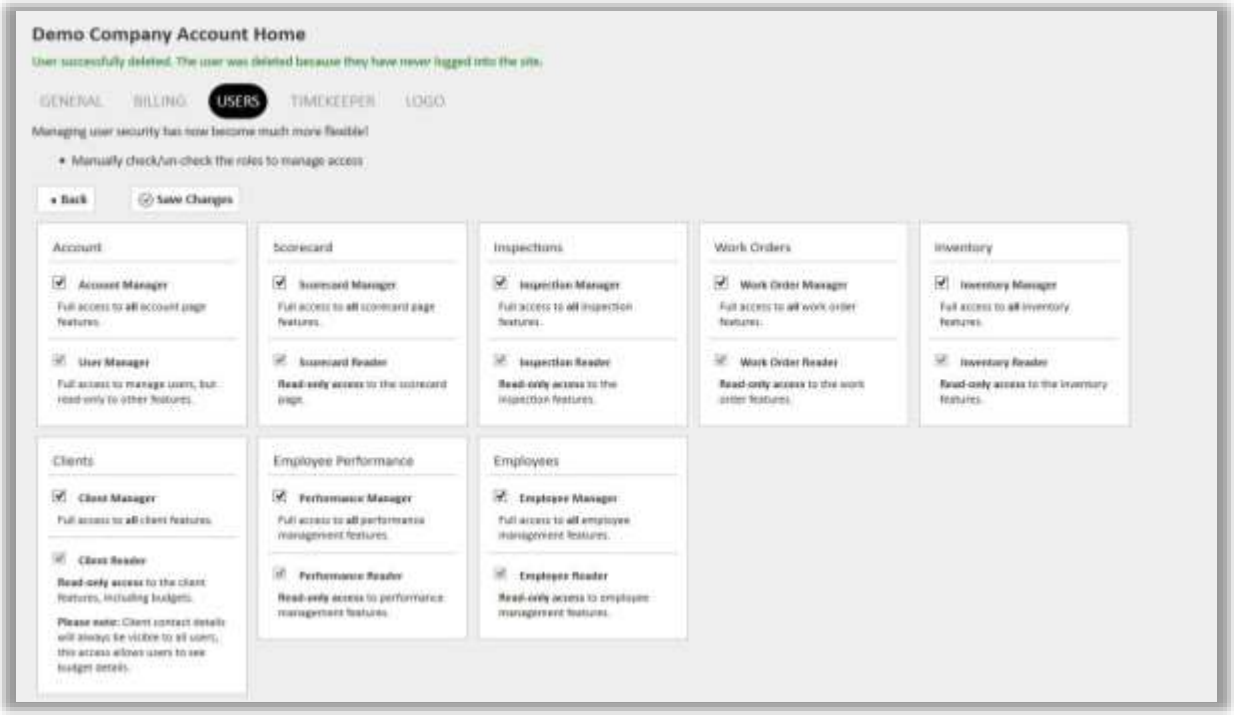


Figure 30

Editing Existing Users

After a user has been added to the JM application, it is possible to edit or update the user's information if needed. Any user information can be edited, even when the user is currently logged in.

Note: In order to edit an existing user, you must be logged into the JM application as an AdminUser!

Select the **Account** tab on the JM application as shown below in Figure 31.

Figure 31

Select the **Users** tab on the JM application as shown below in Figure 32.

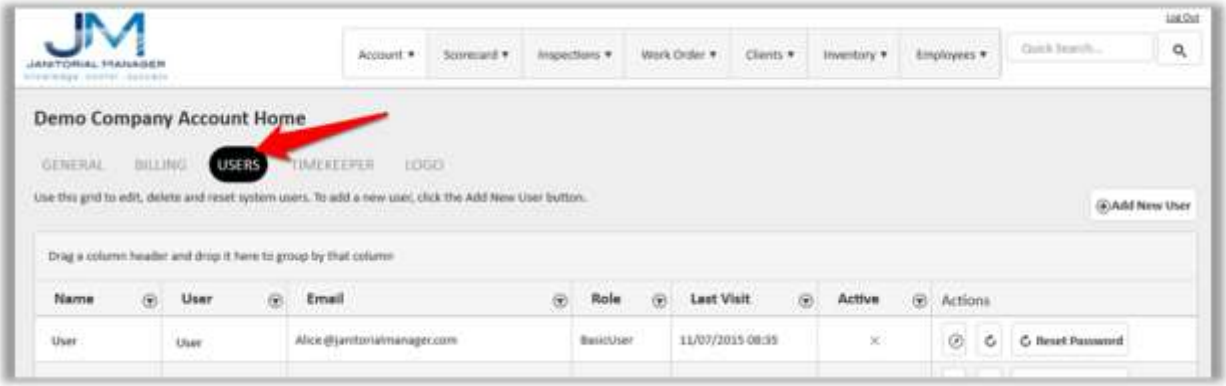


Figure 32

A list of current users will be displayed.

Identify the row containing the username that needs to be edited the select the **Edit User** command as shown in Figure 33.

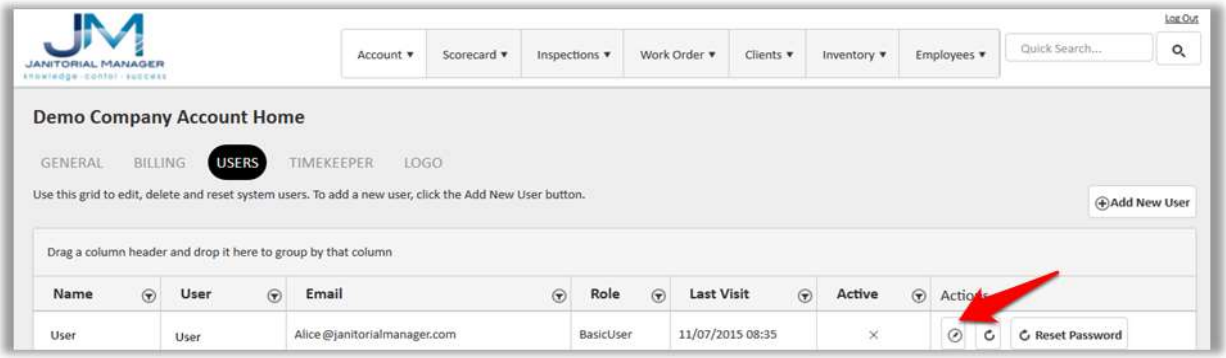


Figure 33

Make the appropriate edits and then click the **Save** command as shown in Figure 34.

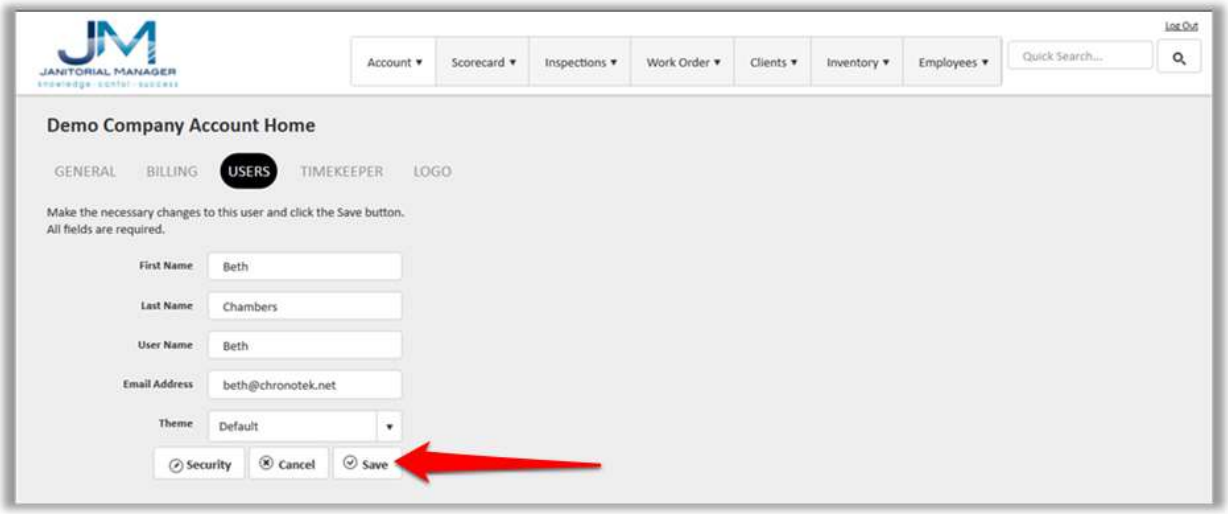


Figure 34

Reset User's Password

Note: In order to edit an existing user, you must be logged into the JM application as an AdminUser!

Select the **Account** tab and then **Manage Account** on the JM application as shown below in Figure 35.

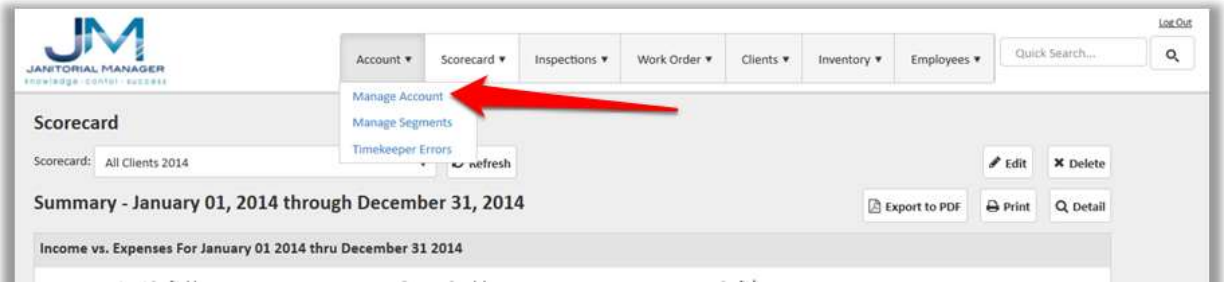


Figure 35

Select the **Users** tab on the JM application as shown below in Figure 36.

Figure 36

A list of current users will be displayed in Figure 37 as shown below.

Figure 37

Identify the row containing the user whose password needs to be reset. Then select the **Reset Password** command.

Once you click the **Reset Password** command, the button will disappear and a message will display confirming that the reset was successful as shown below in Figure 38.

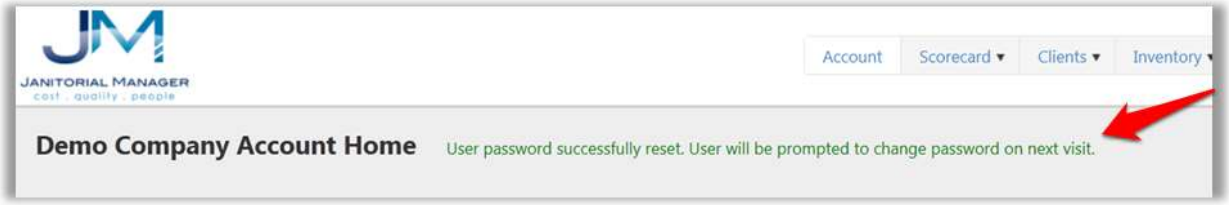


Figure 38

The user whose password was reset will receive an email from *support@janitorialmanager.com* as shown in Figure 39.

Figure 39

Note: if the user does not immediately receive an email, check to make sure a valid email address was provided or make sure your company's spam filter did not capture or quarantine the email sent. You can verify the supplied email address for the user by editing an existing user… go to details

Deleting a User

Once a user has been created there is no way to delete the user account from the system. However, a user can be deactivated.

Note: In order to delete an existing user, you must be logged into the JM application as an AdminUser!

Select the **Account** tab and then **Manage Account** on the JM application as shown below in Figure 40.

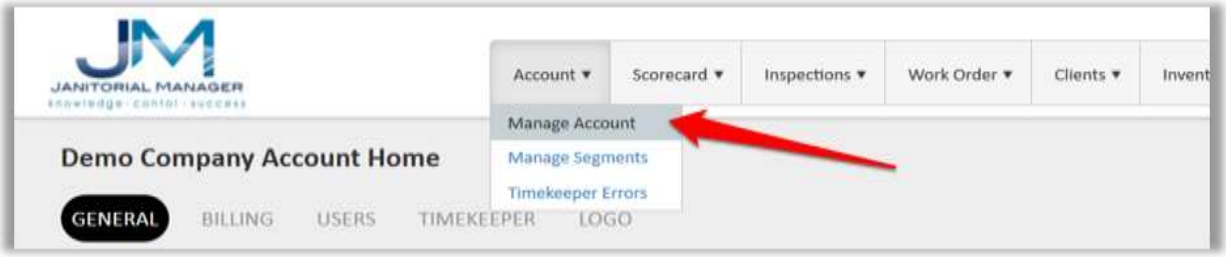


Figure 40

Select the **Users** tab on the JM application as shown below in Figure 41.

Figure 41

Select the **Delete User** command as shown below on the row containing the user that should be deleted as shown in Figure 42.

Figure 42

The user (John Doe) that was "deleted" is marked as inactive. Notice the "x" in the Active columns for this user.

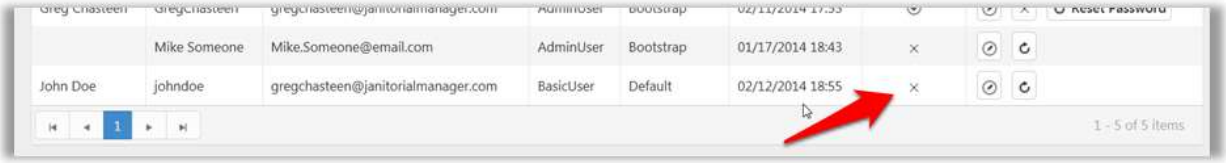


Figure 43

Re-Activating a deleted user

Deleted/inactivated JM users can be re-activated if necessary.

Note: In order to re-activate an inactive user, you must be logged into the JM application as an AdminUser!

Select the **Account** tab and then **Manage Account** on the JM application as shown below in Figure 44.

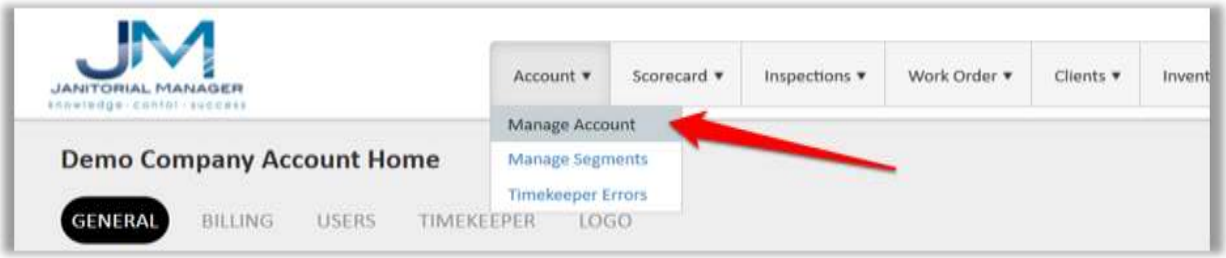


Figure 44

Select the **Users** tab on the JM application as shown below in Figure 45.

Figure 45

A list of current users will be displayed as shown below in Figure 45.

Notice in figure 46 below, the user John Doe. In the **"Active"** column you will find the ☒. The ☒entry is the indication that the user has been previously deleted/inactivated. The ☑ entry indicates that the user is currently active in the JM application.

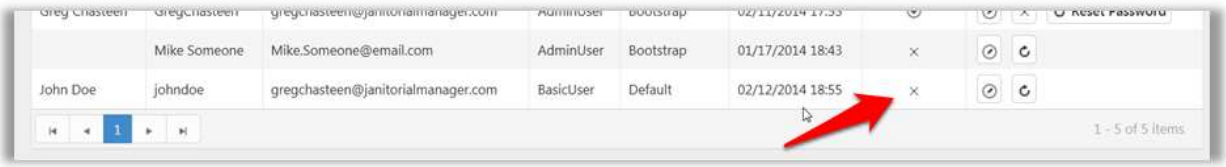


Figure 46

Click the **Activate User** command as shown below in Figure 47 to activate the username John Doe.

Figure 47

A ***User Successfully Activated*** message will be displayed to indicate a successful operation as shown below in Figure 48.

Figure 48

Customize JM with your company logo

Select **Manage Account** under the **Account** tab on the JM application as shown below in Figure 49.

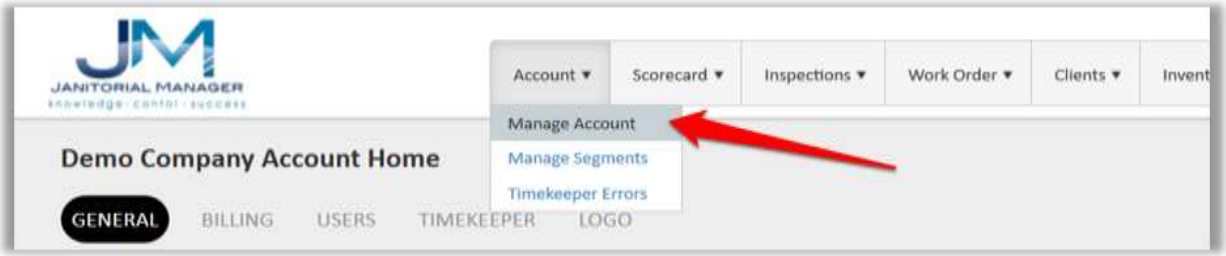


Figure 49

Select the Logo tab as shown below in Figure 50.

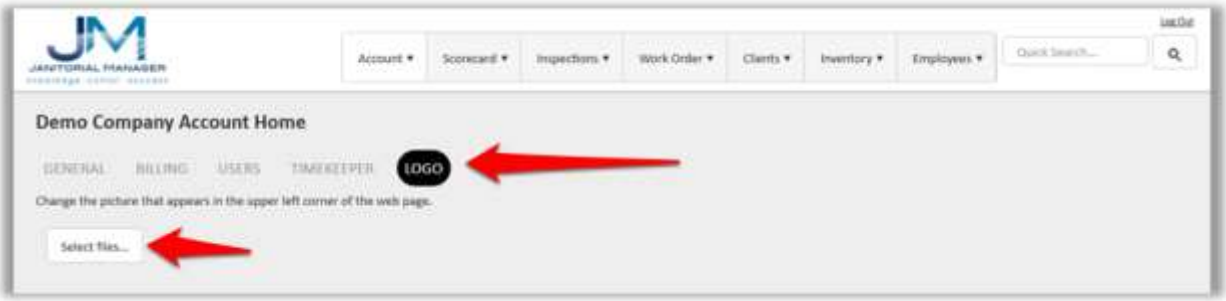


Figure 50

Click the **Select files** button to browse to find your company logo as shown below in Figure 51. Select the desired image and select OK. .

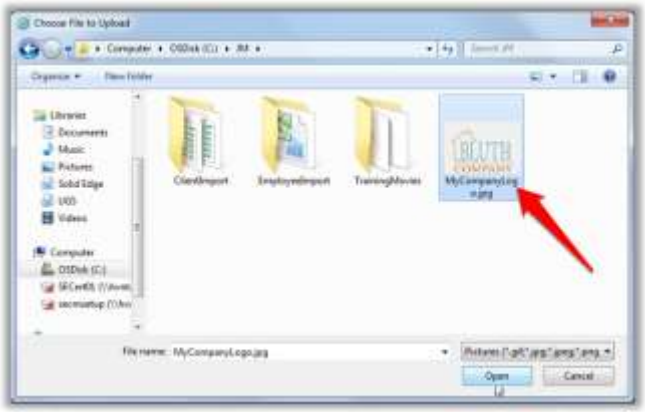


Figure 51

Return to Table Of Contents

When the image has uploaded successfully the following will be displayed. See Figure 52.

Figure 52

JM will display the image you uploaded on all pages within the system and on pages to be printed.

Time Keeping Set Up

Currently Janitorial Manager is integrated with Chronotek Time Keeping. If you are currently a Chronotek customer or intend to be, carefully follow these instructions to setup and view time keeping data in Janitorial Manager.

Enabling Timekeeper Features

1. **Communicate to Chronotek that you would like your account to be added to the JM interface list. Once they provide confirmation, you may move onto step 2. Do not move onto Step 2 until they provide confirmation.**
2. Login to Janitorial Manager.
3. Go to Account -> Manage Account.

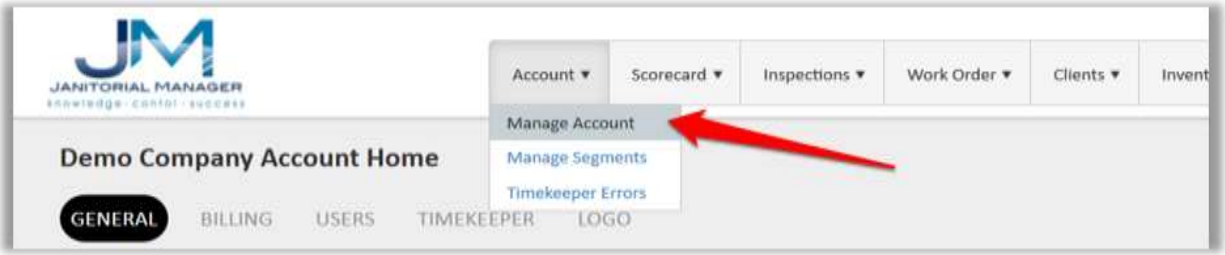


Figure 53

4. Go to the Timekeeper tab.
5. Select Chronotek from the Timekeeper System drop down.
6. Add your Chronotek Account Number to the Reference Number field.
7. Click Save.

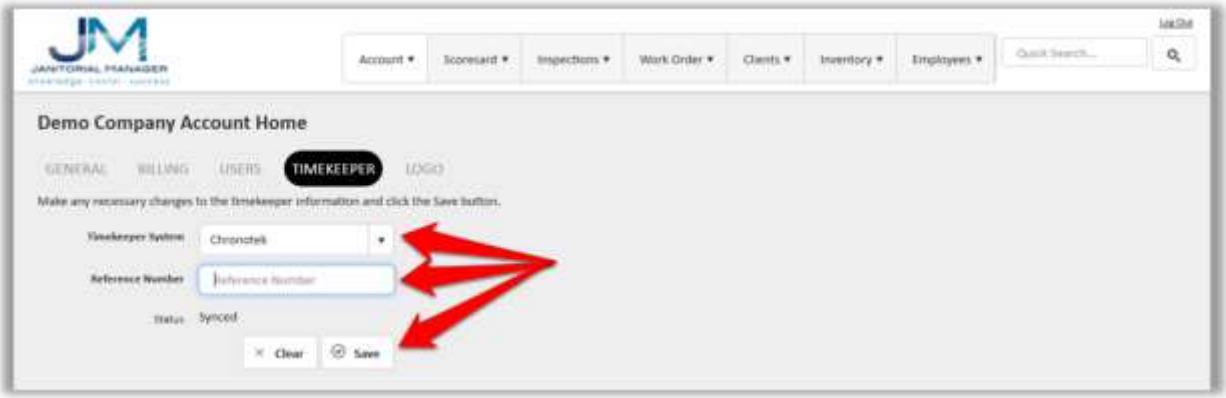


Figure 54

8. An email will be sent to the company contact email address.

Log off JM and log back in again. There will now be several new menu items available.

- Account - > Timekeeper Errors
- Clients -> Chronotek Import
- Employees -> Chronotek Import

STOP!

Your next steps are critical. Pay close attention to the following options! If you have questions, don't guess. Call Support!

Scenario 1: Currently Using Both JM and Chronotek

Follow this scenario if you already have both an active JM and Chronotek account. This is the most difficult situation because manual steps are required to synchronize the two live datasets.

Employee Synchronization

This is an intense task because you will need to manually add the **JM Employee External Code** to all **Chronotek Employee** records. This is required to establish a link between the data sets in each system. This task is required only during the onboarding process and will happening automatically for new employee records.

1. Login to Janitorial Manager.
2. Go to Employees -> Manage Employees.
3. Locate the **External Code** column in the grid.

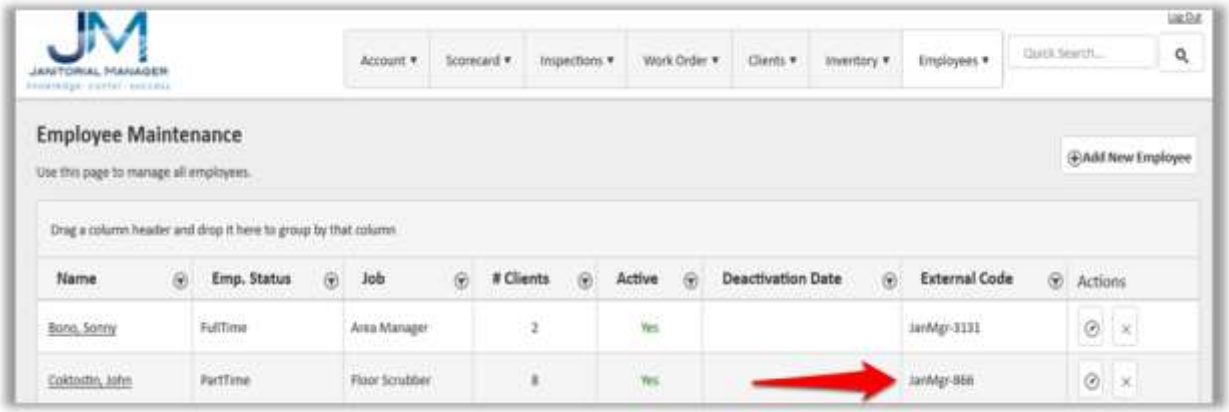


Figure 55

4. On a new tab, login to your Chronotek account.
5. Go to List Maintenance -> Employees.
6. Change the View drop down list menu to "Show: All"
7. For each employee in the list…
    a. Select the employee
    b. Select the Advanced tab in the right pane
    c. Go back to JM
    d. Find the corresponding Employee in the JM grid
        i. If the employee is not in JM, create this employee in JM first, then proceed
    e. Copy the corresponding Employee External Code from the JM grid
    f. In the Chronotek Advanced pane, find the External Code 1 field

g. Paste the copied value into the External Code 1 field

i. If External Code 1 is full, use External Code 2

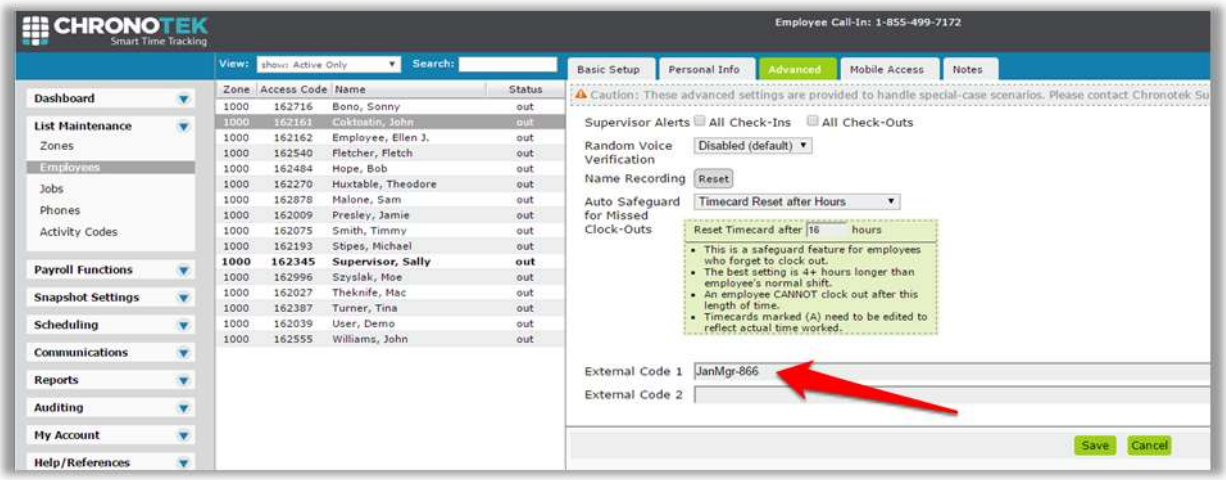


Figure 56

ii. If both External Code fields are full, please contact JM and Chronotek Support

h. Click save

8. Go back to step 7 and repeat for each employee in the Chronotek list of employees
9. Within Chronotek, click the List Maintenance -> Employees item
10. Click the excel icon to download an excel file containing all Chronotek Employees, save this file to your computer hard drive.

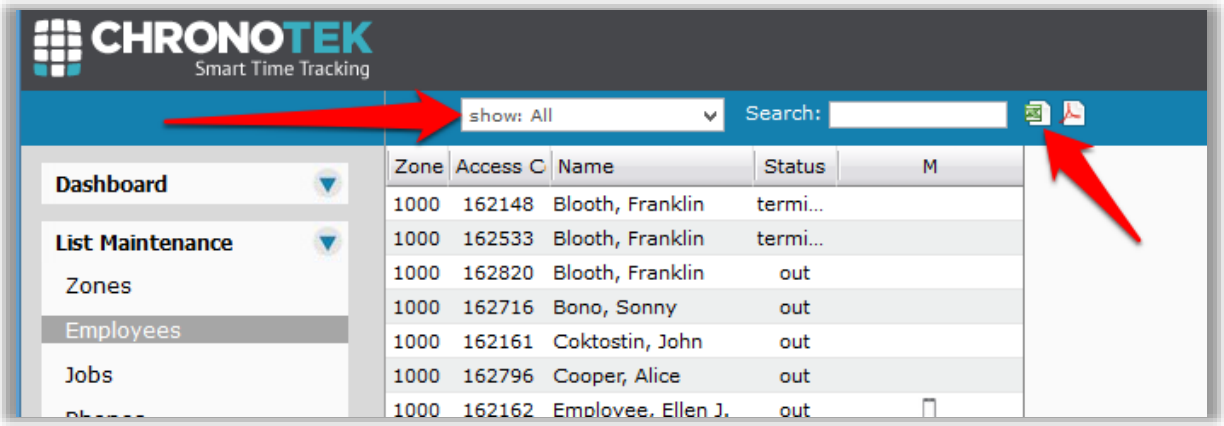


Figure 57

11. Go back into JM to the Employees -> Chronotek Import page

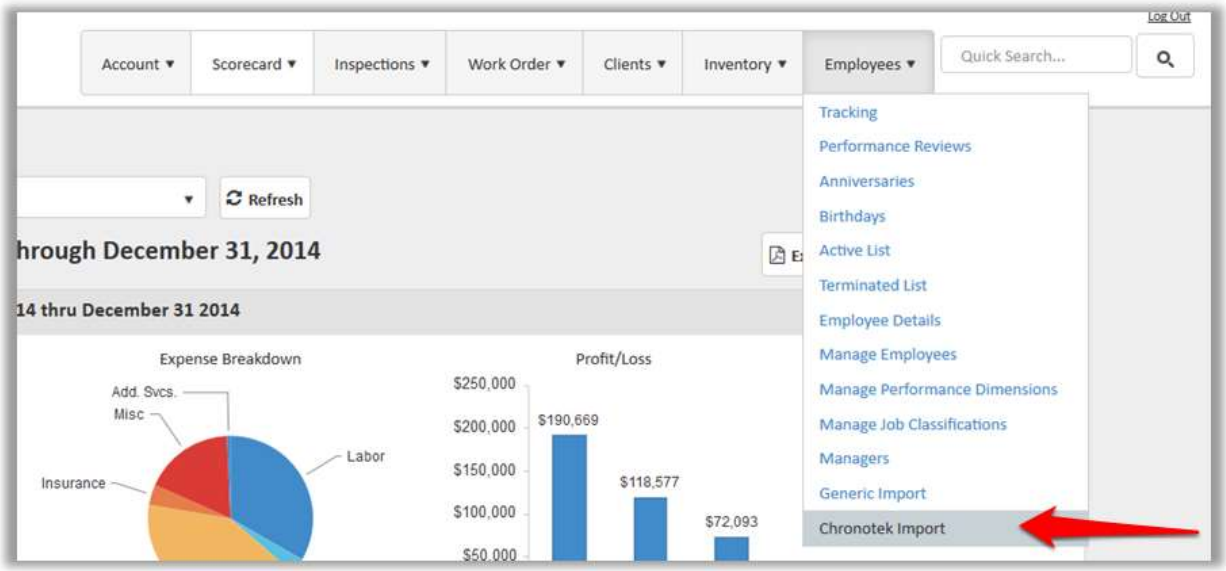


Figure 58

12. Browse and select the previously saved excel file containing Chronotek Employees
13. Click Upload Chronotek Workbook
14. This may take a few minutes to process
15. Review the results
    a. If all records uploaded successfully then the synchronization is complete
    b. If errors occurred, perform the following steps (do not close your error window):
        i. Open a new browser tab and log into JM
        ii. Read each error carefully
            1. "Employee code was not properly formatted"
                a. This should not happen – if it does contact JM and Chronotek support
            2. Janitorial Manager employee record with External Code <code> was not found for <Last Name>, <First Name>
                a. An invalid JM Employee External Code was saved on the Chronotek Employee record, this is likely a data entry error.
                b. Go back into Chronotek and fix the error for the specified employee
            3. If a different error occurred please contact JM support immediately. This happened because an unexpected value was received Chronotek and we need to investigate to address the problem.
        iii. Once errors are corrected, go back to Step 9 and attempt the process again.

Where should I create new employee records?

Janitorial Manager is the system of record for your employee information. After synchronization is complete, you will no longer need to add to employees Chronotek. Add the new employee to Janitorial Manager and we will synchronize this employee to Chronotek for you.

What about employee changes that occur after the synchronization is complete?

Janitorial Manager will send new employees, updated employees and terminated employees to Chronotek every night for your account. However, there may be times when you need to edit Chronotek specific features of the employee record. Those features must be handled outside of Janitorial Manager.

Client Synchronization

This is an intense task because you will need to manually add the **JM Client External Code** to all **Chronotek Job** records. This is required to establish a link between the datasets in each system. This task is required only during the onboarding process.

1. Login to Janitorial Manager.
2. Go to Clients -> Manage Clients.
3. Locate the **External Code** column in the grid.

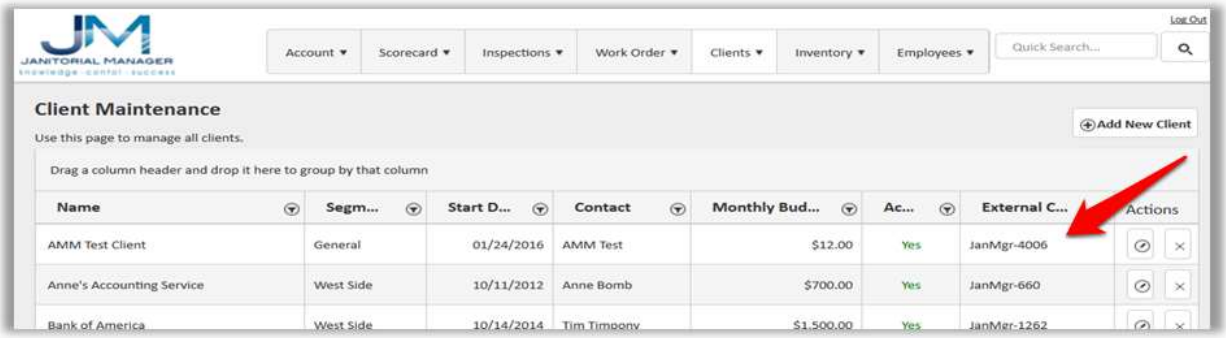


Figure 59

4. On a new tab, login to your Chronotek account.
5. Go to List Maintenance -> Jobs.
6. Change the View drop down list menu to “Show All”
7. For each job in the list…
    a. Select the job
    b. Select the Advanced tab in the right pane
    c. Go back to JM
    d. Find the corresponding Client in the JM grid
        i. If the client is not in JM, create this client in JM first, then proceed
    e. Copy the corresponding Client External Code from the JM grid

f. In the Chronotek Advanced pane, find the External Code 1 field

g. Paste the copied value into the External Code 1 field

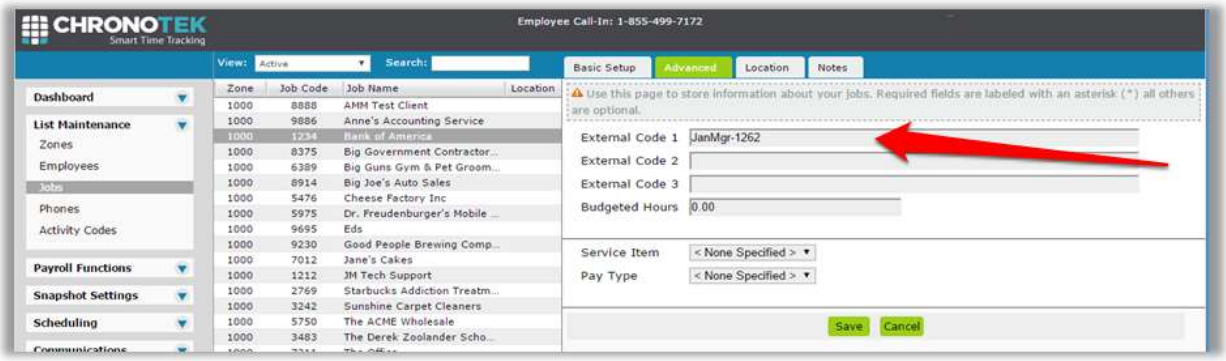


Figure 60

i. If External Code 1 is full, use External Code 2

ii. If External Code 2 is full, use External Code 3

iii. If all External Code fields are full, please contact JM and Chronotek Support

h. Click save

8. Go back to step 7 and repeat for each job in the Chronotek list of jobs
9. Within Chronotek, click the List Maintenance -> Jobs
10. Click the excel icon to download an excel file containing all Chronotek Jobs, save this file to your computer hard drive.

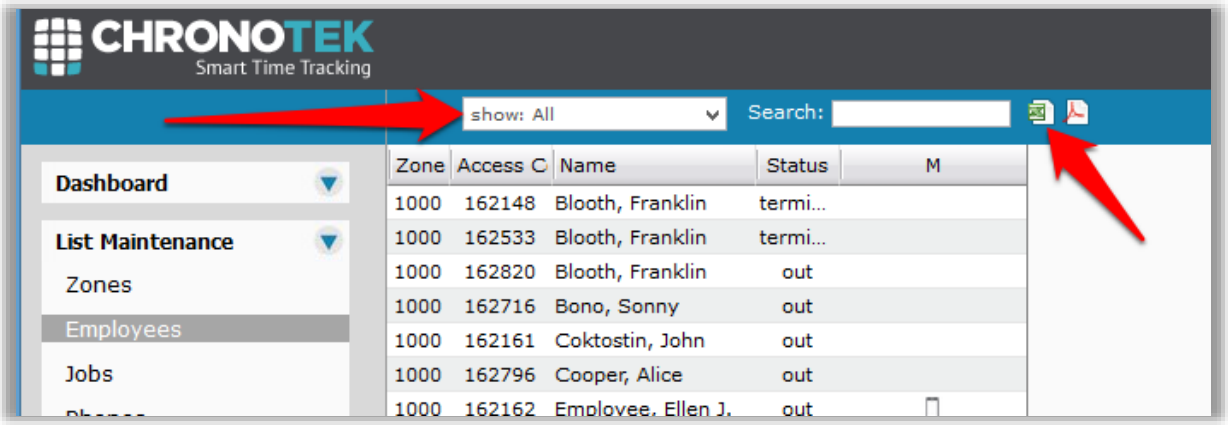


Figure 61

11. Go back into JM to the Clients -> Chronotek Import page

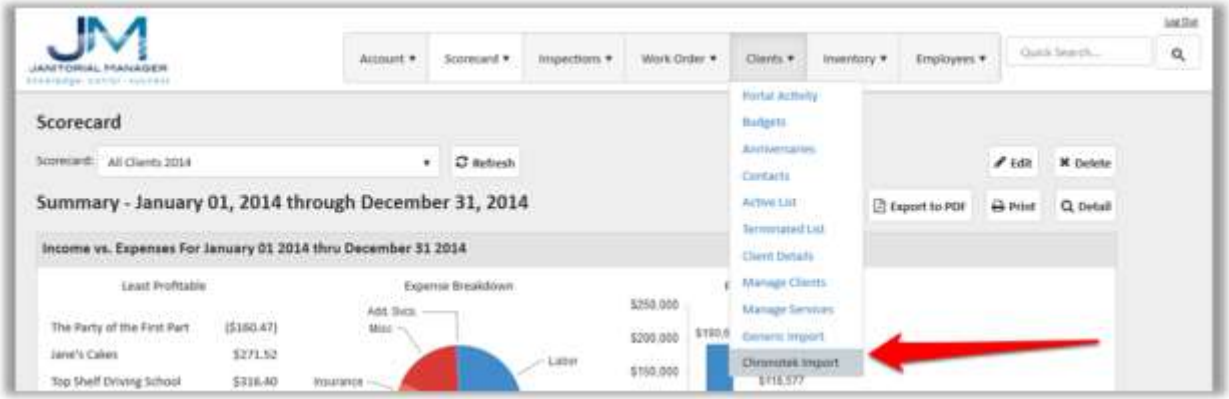


Figure 62

12. Browse and select the previously saved excel file containing Chronotek Jobs
13. Click Upload Chronotek Workbook
14. This may take a few minutes to process
15. Review the results
    a. If all records uploaded successfully then the synchronization is complete
    b. If errors occurred, perform the following steps (do not close your error window):
        i. Open a new browser tab and log into JM
        ii. Read each error carefully
            1. Janitorial Manager client record with External Code <code> was not found for <Job Name>
                a. An invalid JM Client External Code was saved on the Chronotek Job record, this is likely a data entry error.
                b. Go back into Chronotek and fix the error for the specified client
            2. If a different error occurred please contact JM support immediately. This happened because an unexpected value was received Chronotek and we need to investigate to address the problem.
        iii. Once errors are corrected, go back to Step 9 and attempt the process again.

Where should I create new client records?

Janitorial Manager is the system of record for your client information. After synchronization is complete, you will no longer need to add to jobs into Chronotek. Add the new client to Janitorial Manager and we will synchronize this client to Chronotek for you.

What about client changes that occur after the synchronization is complete?

Janitorial Manager will send new clients, updated clients and terminated clients to Chronotek every night for your account. However, there may be times when you need to edit Chronotek specific features of the job record. Those features must be handled outside of Janitorial Manager.

Scenario 2: Current Chronotek User, New to JM

Do not enter any Client or Employee data! It is important to wait to create employee and client records until the proper steps have been taken.

Inform Chronotek that you'd like to participate in the JM interface.

Employee Import from Chronotek

1. Login to Chronotek
2. Go to List Maintenance -> Employees (Make sure "show: All" is selected)
3. Click the excel icon to download employee list to your computer hard drive

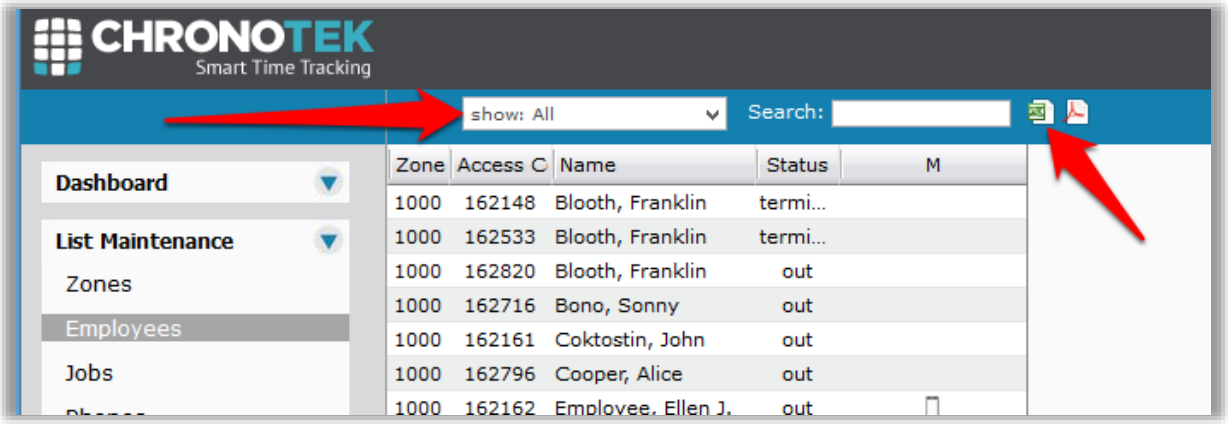
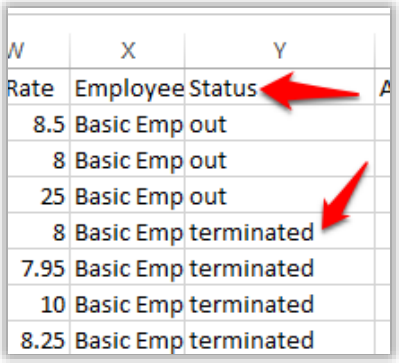


Figure 63

4. Locate, open and review downloaded spreadsheet. Delete any rows with employees who have been terminated. Save file again.



W	X	Y
Rate	Employee	Status
8.5	Basic Emp	out
8	Basic Emp	out
25	Basic Emp	out
8	Basic Emp	terminated
7.95	Basic Emp	terminated
10	Basic Emp	terminated
8.25	Basic Emp	terminated

Figure 64

5. Log into Janitorial Manager
6. Go to Employees -> Chronotek Import

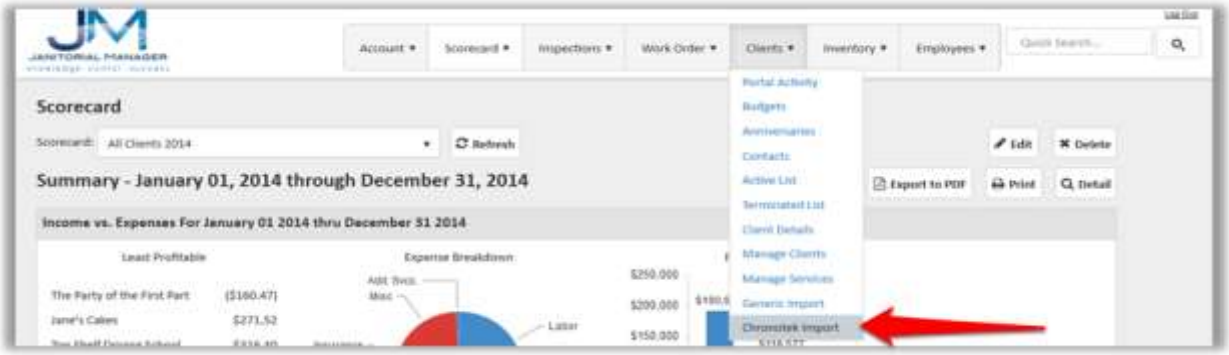


Figure 65

7. Click browse and select the employee file previously saved
8. Click Upload Chronotek Workbook
9. This may take a few minutes to complete
10. If an error occurs please contact JM support. This is happening likely because an unexpected value was received and we need to adjust program logic to read appropriately.
11. Once complete, you'll need to go into JM and fill in required fields that were not provided by Chronotek.
    a. Social security number
    b. Address and contact information
    c. Job classification
    d. Hourly wage (if not saved in Chronotek)

Client Import from Chronotek

1. Login to Chronotek
2. Go to List Maintenance -> Jobs
3. Click the excel icon to download job list to your computer hard drive

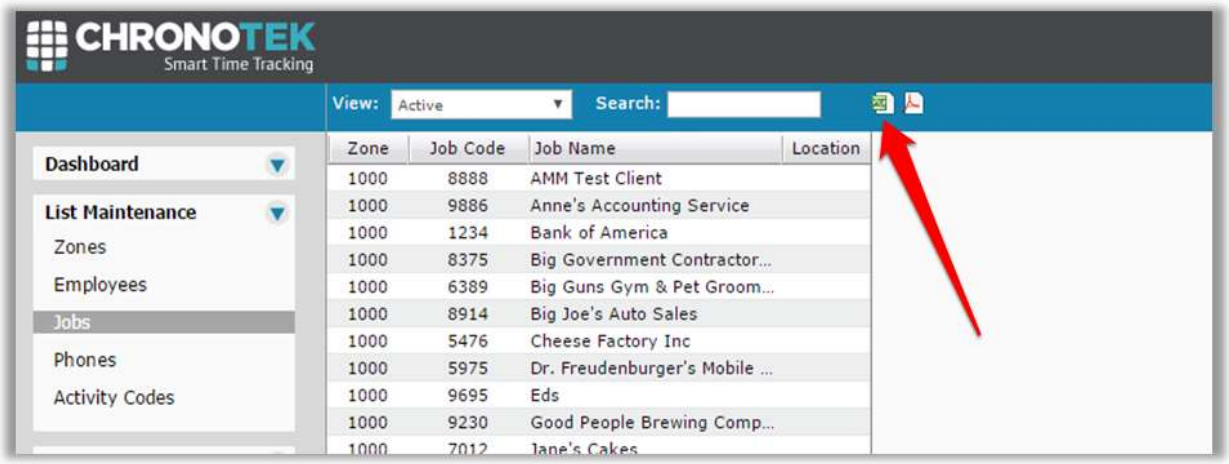


Figure 66

4. Log into Janitorial Manager

5. Go to Clients -> Chronotek Import

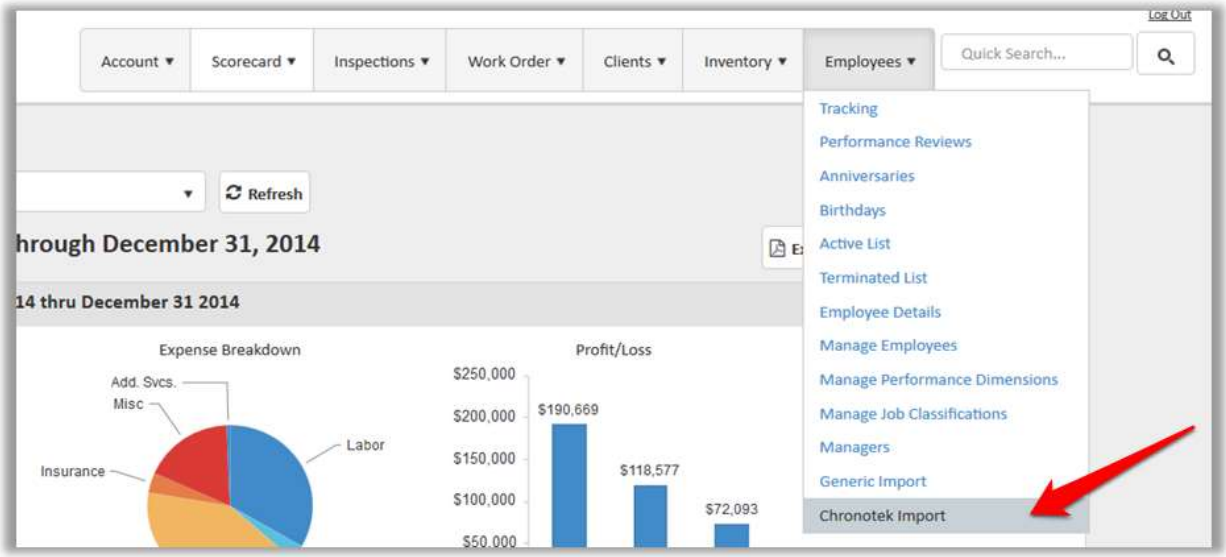


Figure 67

6. Click browse and select the job file previously saved
7. Click Upload Chronotek Workbook
8. This may take a few minutes to complete
9. If an error occurs please contact JM support. This is happening likely because an unexpected value was received and we need to adjust program logic to read appropriately.
10. Once complete, you'll need to go into JM and fill in required fields that were not provided by Chronotek.
    a. Address and contact information
    b. Monthly rate information

Scenario 3: Existing JM User, New to Chronotek

First, **contact Chronotek and setup your account**. **Inform them that you'd like to participate in the JM interface.** Once they have confirmed your participation you may go into Janitorial Manager and enable the timekeeping features as follows.

1. Login to Janitorial Manager.
2. Go to Account -> Manage Account.
3. Go to the Timekeeper tab.
4. Select Chronotek from the Timekeeper System drop down.
5. Add your Chronotek Account Number to the Reference Number field.

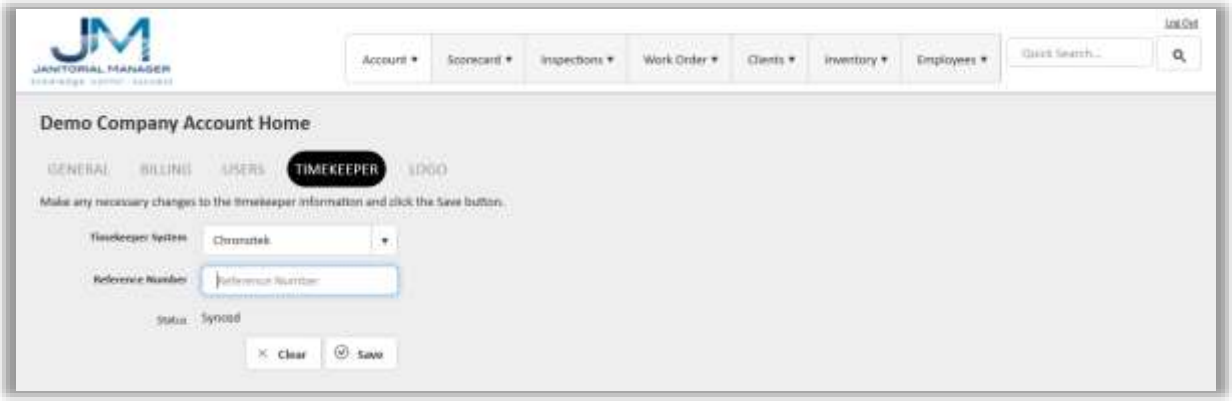


Figure 68

6. Click Save.
    a. An email will be sent to the company contact email address.

Log off JM and log back in again. There will now be several new menu items available.

- Account - > Timekeeper Errors
- Clients -> Chronotek Import
- Employees -> Chronotek Import

Chronotek will receive your employees and clients out of JM within a few business days. There may be additional setup procedures within Chronotek to begin using their system. If you do not see your employee and job lists within Chronotek within a few days, please contact JM support.

Reviewing Errors

Chronotek sends time card data every morning containing recent time card details. The interface works only after client and employee synchronization is completed. If the synchronization contains errors, or is not 100% complete, errors may be created by the time card interface. You should check the timekeeper error log at least weekly to make sure all data is coming over successfully.

To review errors, go to Account -> Timekeeper Errors.

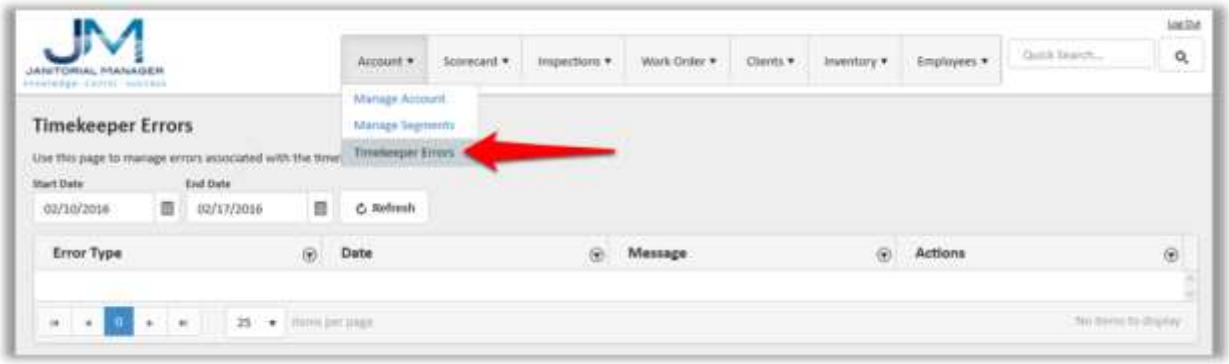


Figure 69

Manage Clients

Clients can be added to Janitorial Manager either by importing a properly formatted Excel spreadsheet or entered individually. It is important to note that batch importing clients using a spread sheet automatically overwrites any existing client records. The import function should only be used for initial company setup.

Over time as your janitorial company grows and you a new customers to your business they will need to be added to JM individually with the Add New Client command.

Add New Client

Note: In order to add a new individual client, you must be logged into the JM application with sufficient user privileges.

Select the **Manage Clients** command from the **Clients** dropdown list as shown in Figure 69.

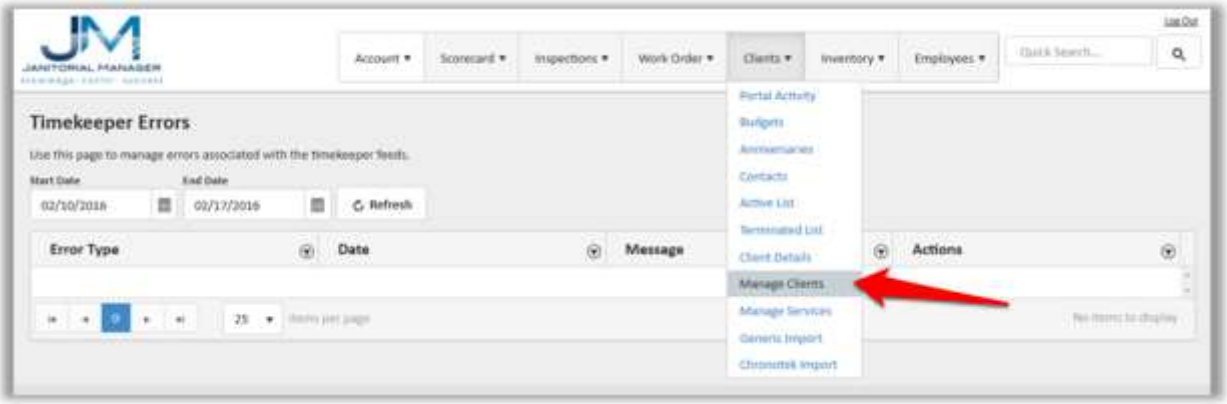


Figure 70

Select the **Add New Client** command as shown below in Figure 70.

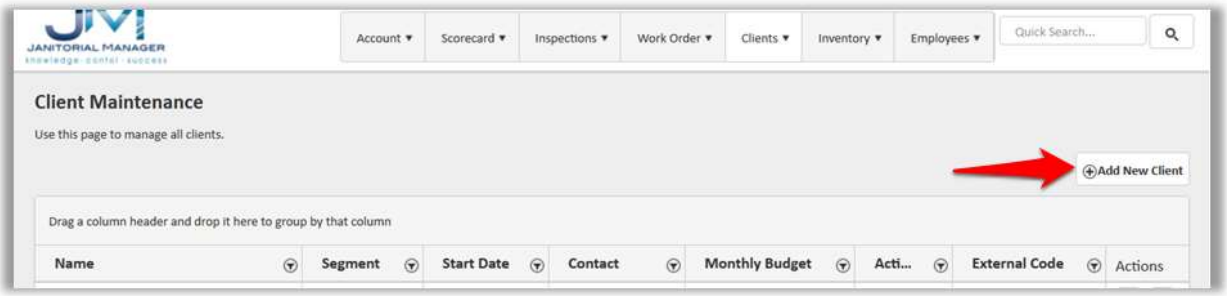


Figure 71

After adding the required information and any of the other optional information for the client, select the **Save** command to save this supplied information permanently to JM as shown in Figure 71 below.

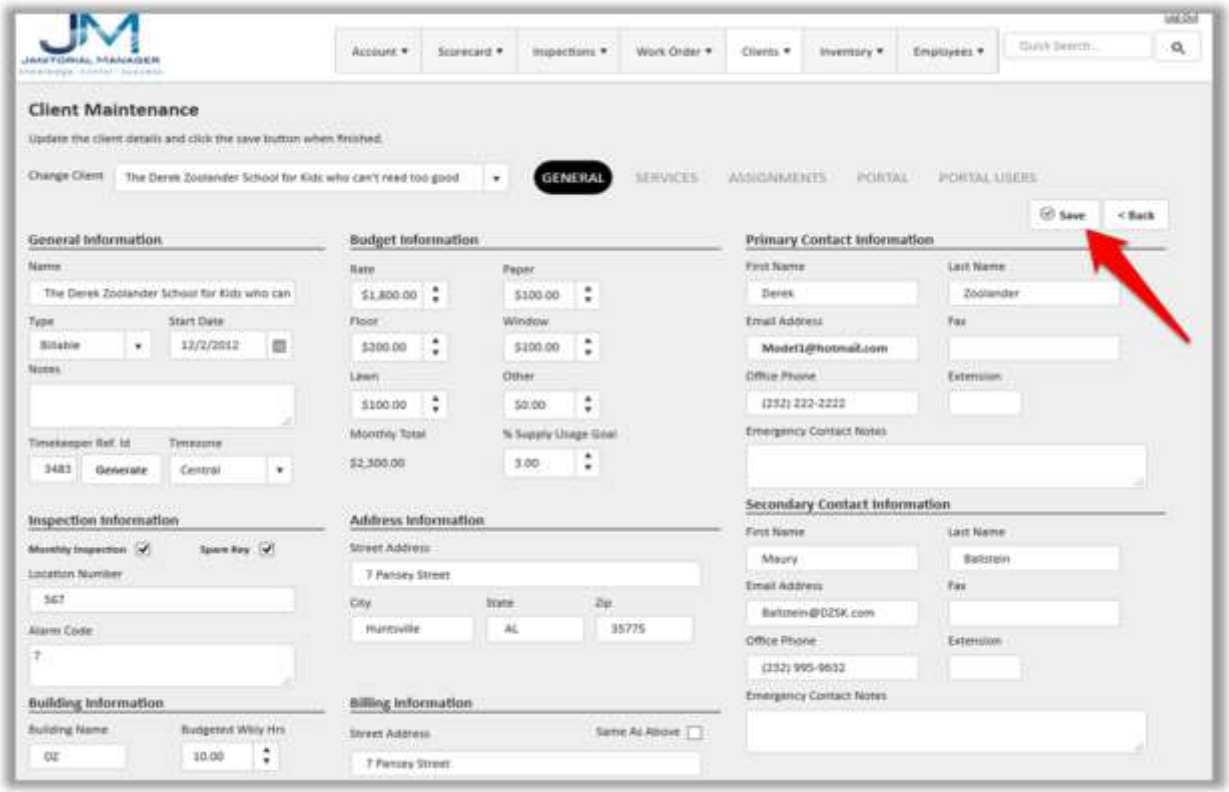


Figure 72

Import Clients

Note: In order to bulk import clients, you must be logged into the JM application with sufficient user privileges! **The Import features should only be used during initial setup.**

Select the **Import** command from the **Clients** dropdown list as shown in Figure 72 below.

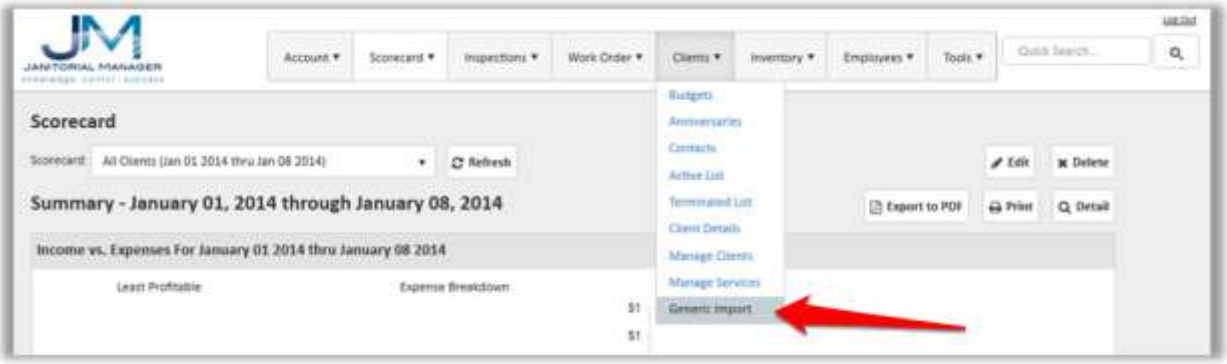


Figure 73

From the Import Client Data window, Figure 73, select the ***Instructions*** link.

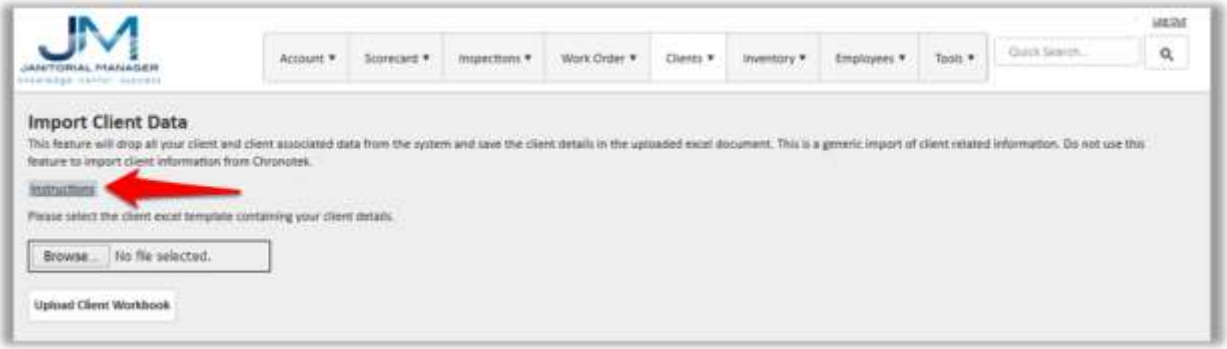


Figure 74

Note: Depending on what your browser's security settings are you might have to edit some options to allow the Excel spreadsheet to be downloaded to your machine.

After downloading, open the spreadsheet using the Microsoft Excel application as shown below.

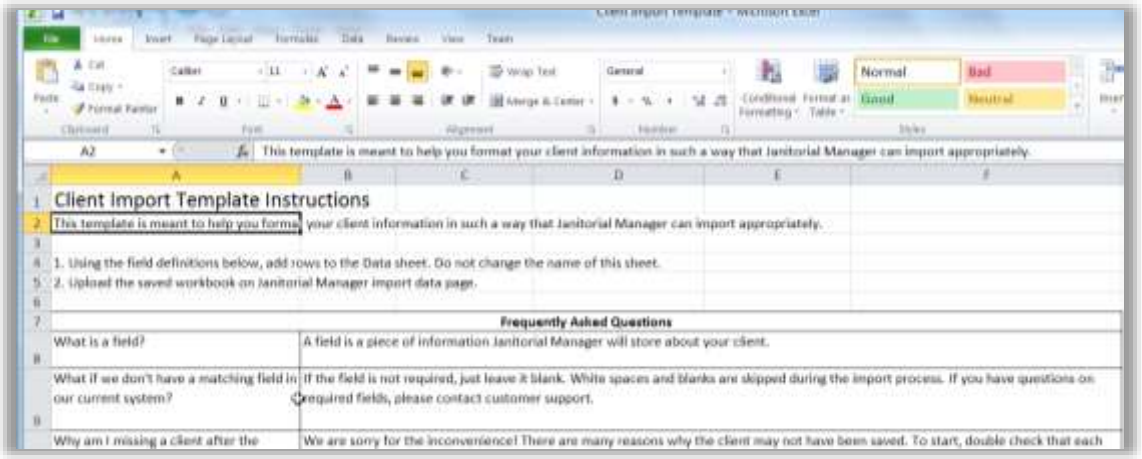


Figure 75

The first tab in the excel file is named "Instructions". This as you would expect contains instructions for the import process including some frequently asked questions, required data and optional data.

The second tab name "Data" contains the information that will be imported into the JM application for your company.

The following chart shows the required data for each client. The import will error out if any of the client are missing any of the required information.

Id	**Number**
Name	**Max 500 chars**
Type	**Max 25 chars**
Anniversary Date	
Street Address	**Max 255 chars**
City	**Max 255 chars**
State	**Max 50 chars**
Zip Code	**Max 10 chars**
Billing Address Same	**true/false**
Billing Street Address	**Max 255 chars**
Billing City	**Max 255 chars**
Billing State	**Max 50 chars**
Billing Zip Code	**Max 10 chars**
Monthly Rate	
Monthly Inspection Required	**true/false**
Primary Contact First Name	**Max 100 chars**
Primary Contact Last Name	**Max 100 chars**
Primary Email Address	**Max 255 chars**

Figure 76

Note: The ID column should be a unique number (integer) assigned to each client. Typically, this should be simply incremented by one for each client in the spreadsheet.

WARNING: Do not modify the sheet names in the excel file, the column headers, or leave empty rows in the data (client information, one row per client, should be continuous rows on the sheet without any empty rows within the data).

After you have filled out the Data sheet for each of your client both the required information and the optional information, save the excel spreadsheet.

Select the **Browse** command as shown in Figure 76. A familiar Windows dialog will appear. In this dialog browse to the folder location and then select the specific xslx location containing the excel file containing your client data.

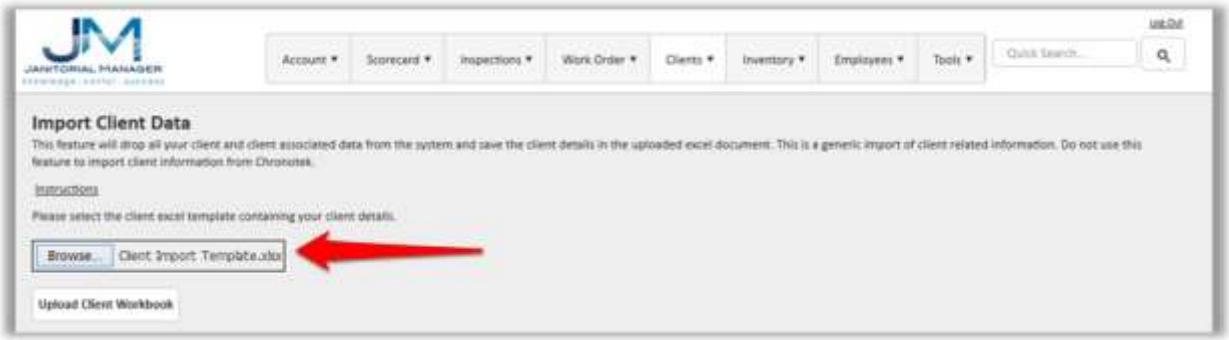


Figure 77

Select the **Upload Client Workbook** command to actually import or transfer the client data from the excel spreadsheet into the JM application.

A possible error that you might receive is shown below in Figure 77.

Figure 78

If you happen to receive the above error, you will need to download the following Microsoft Update from the link http://www.microsoft.com/en-us/download/details.aspx?id=13255

Editing Existing Clients

After a client is added to the JM application, all client information can be edited as necessary. As your business grows and adapts to the janitorial market in your area, inevitably client information will periodically need to be changed or updated to keep current information in JM.

Select the **Manage Clients** command from the **Clients** pulldown list as shown below in Figure 78.

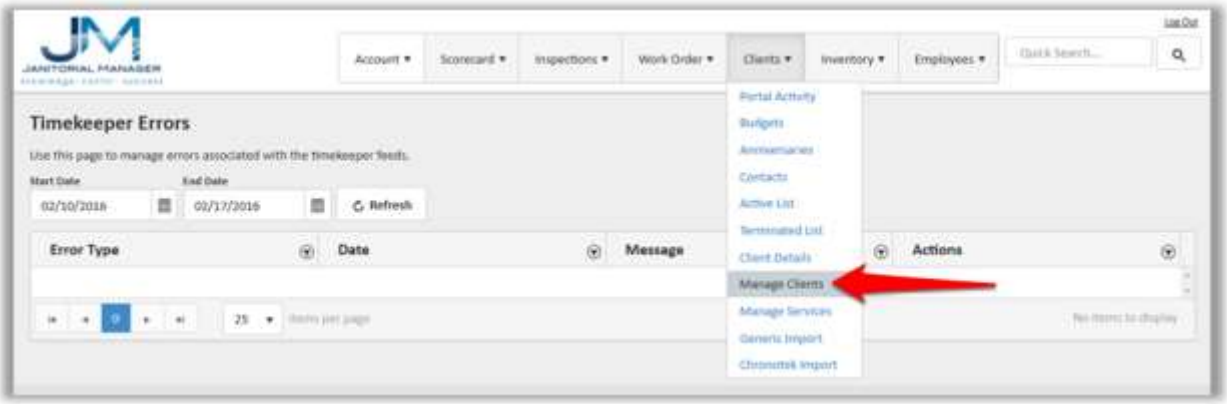


Figure 79

A list of clients will be displayed as shown in Figure 79.

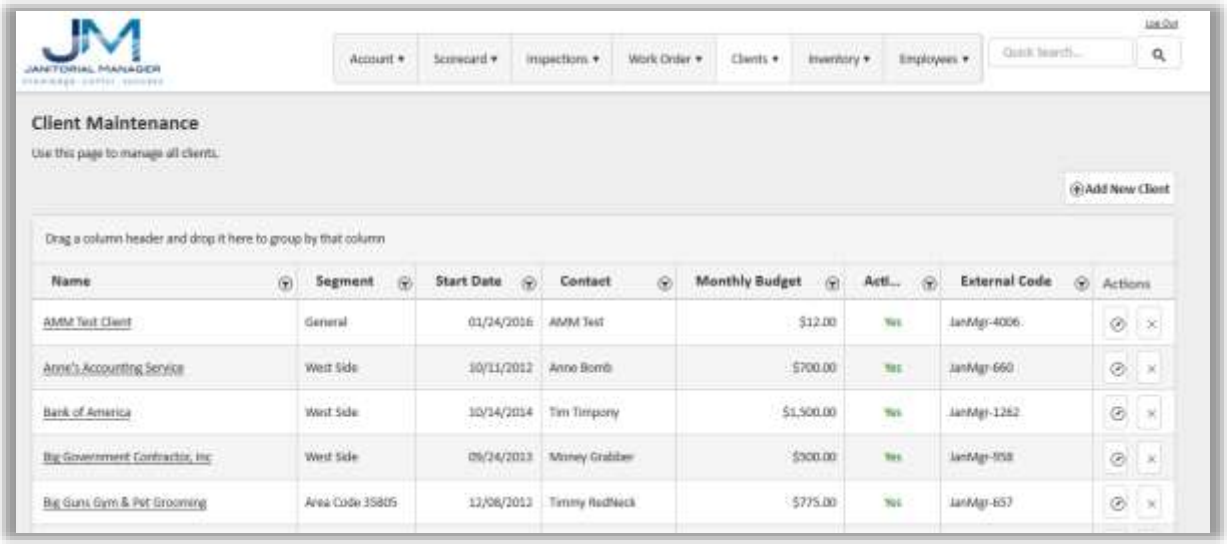


Figure 80

Searching for Existing clients

You will need to locate the row containing the client to be edited. You can use the following tools to locate the desired client in the list.

1. You can sort the NAME column in ascending or descending order by clicking in the name column as shown in Figure 80.

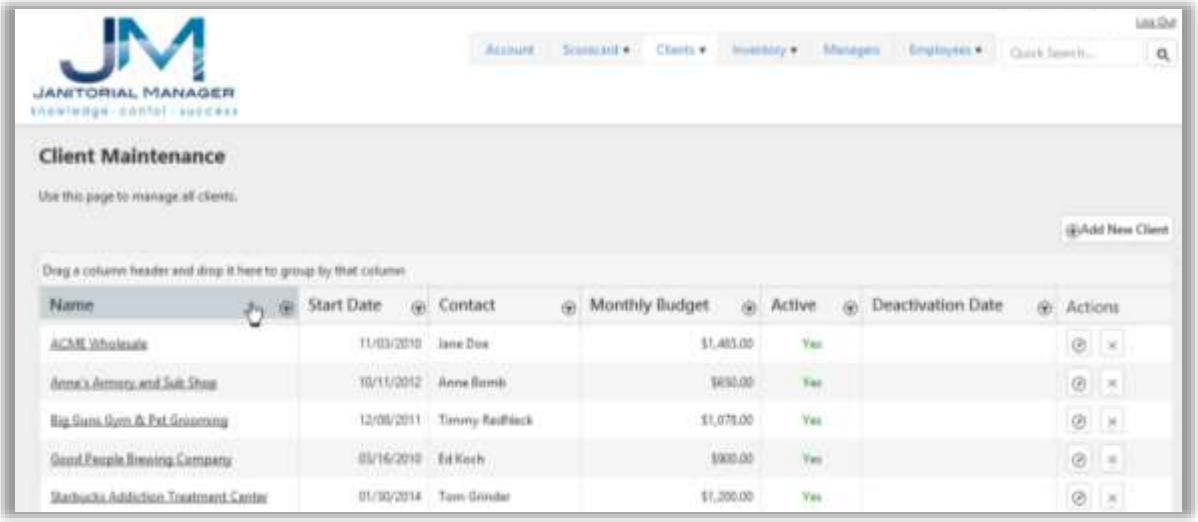


Figure 81

2. You can switch between pages by selecting the specific page number shown of moving forward/backward by selecting the arrow buttons. You can either advance one sheet at a time or move all the way to the first/last sheet.

Figure 82

3. You can search/filter for the specific client based on the name.
   - Click the filter icon in the NAME column as shown in Figure 82.

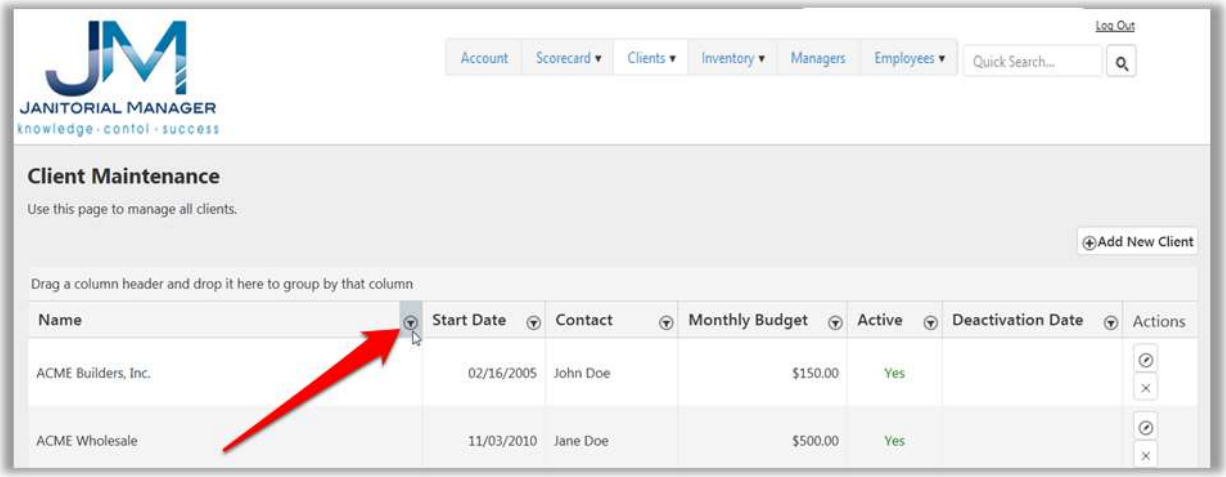


Figure 83

The following form will be displayed.

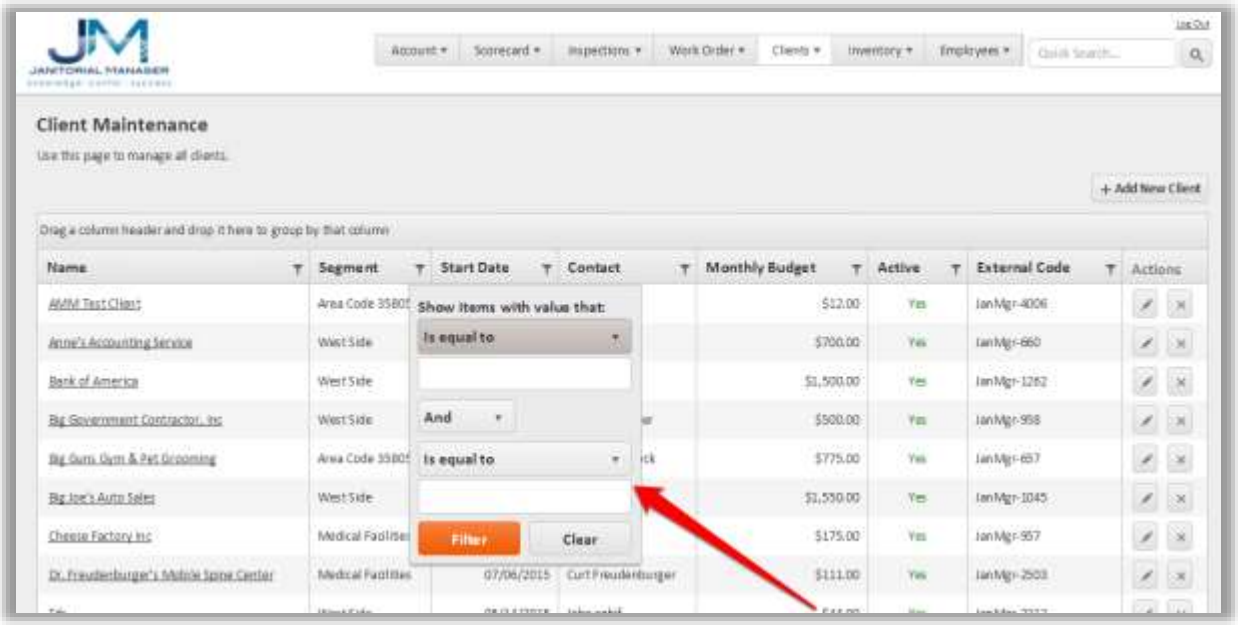


Figure 84

- In the **Show items with value that:** dropdown list select **"Contains"**

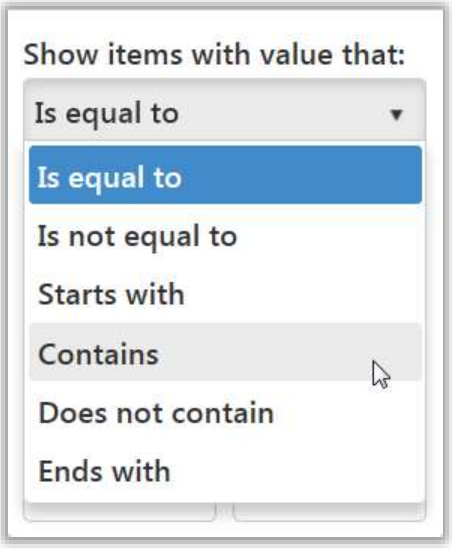


Figure 85

- In the value field enter "the"

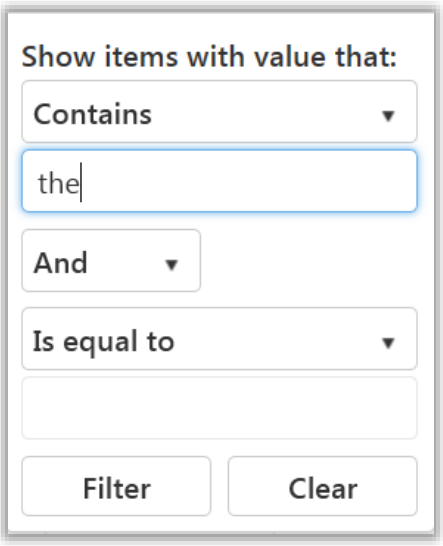


Figure 86

- Click the **Filter** command

Notice all the entries that are shown are only the ones were “the” are contained in the name. The other entries have been temporarily filtered out.

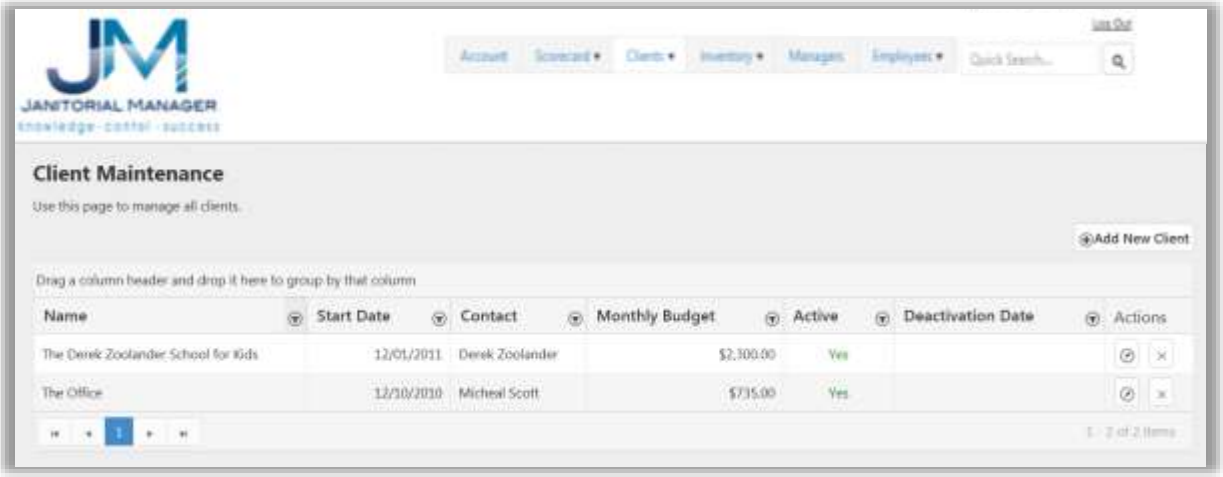


Figure 87

To remove or clear the filter so ALL entries are displayed again, simply click the **Clear** button

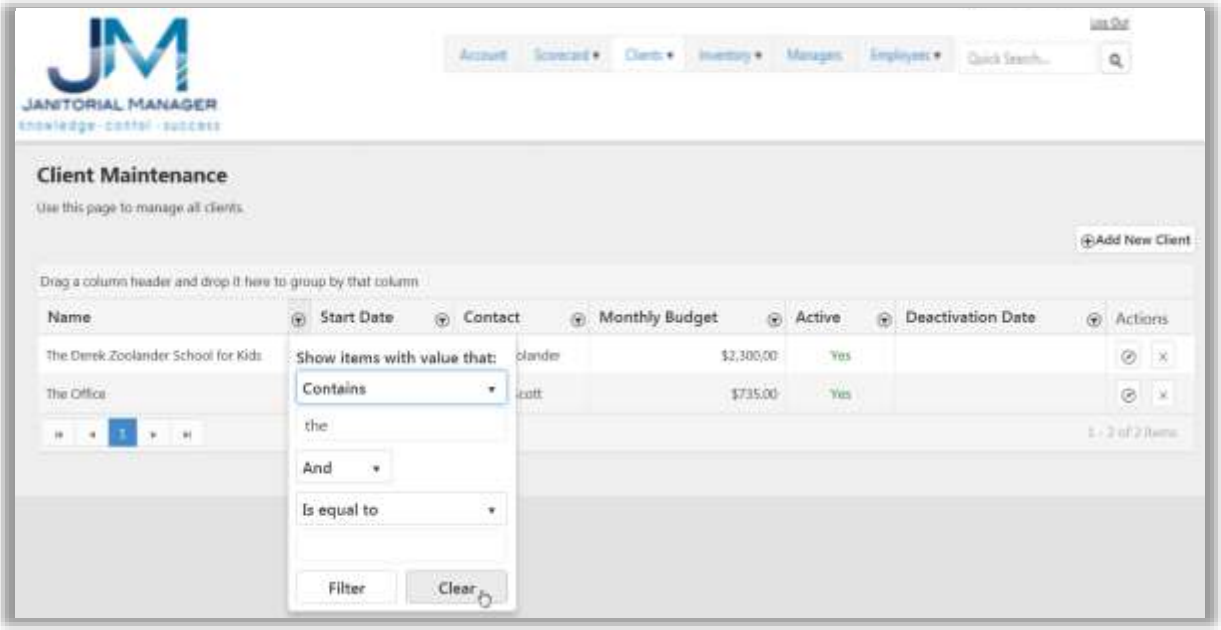


Figure 88

Once the row containing the client that needs to be edited has been located, click the **Edit Client** command as shown in Figure 88.

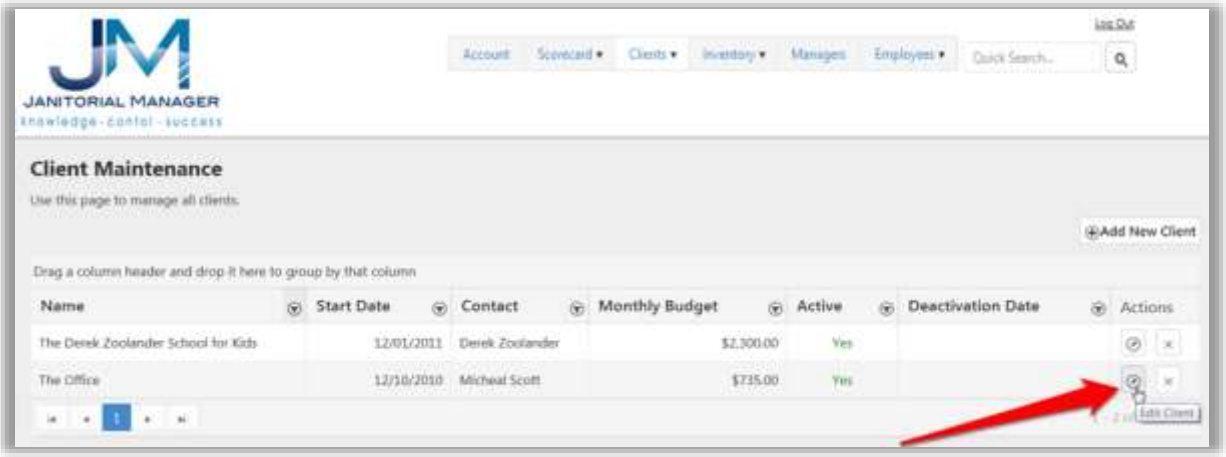


Figure 89

Make the necessary edits to the record and then click the **Save** command to store the changes in JM as shown in Figure 88 below.

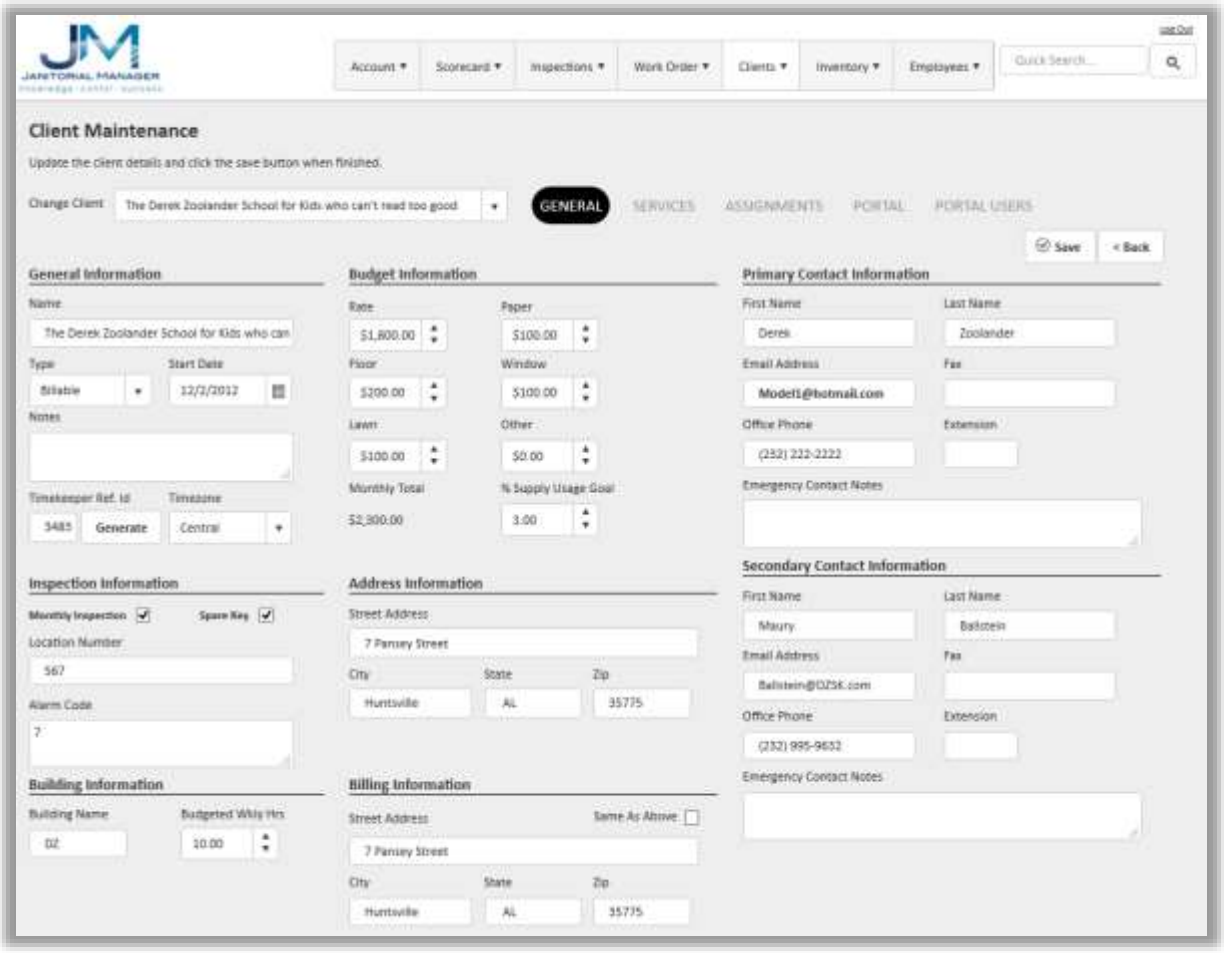


Figure 90

Note: You must enter a value for all the required fields. The following information is required before the client can be saved.

Name, Type, Anniversary Date, Street Address, City, State, Zip Code, Billing Street Address, Billing City, Billing State, Billing Zip Code, Monthly Rate, Primary Contact First Name, Primary Contact Last Name, Primary Email Address

De-activating a Client

After a client has been added to JM, a client can be inactivated. In most cases the client should not deleted because removing client data will negatively affect the accuracy of the Scorecard year-to-date calculations and reports.

If a client has been inactivated, all previous financial transactions will be maintained. Any inactivated clients will not be displayed on any dialog where you can choose a client from a dropdown list.

For example: in the client dropdown list shown in Figure 90, only **active** clients will be displayed!

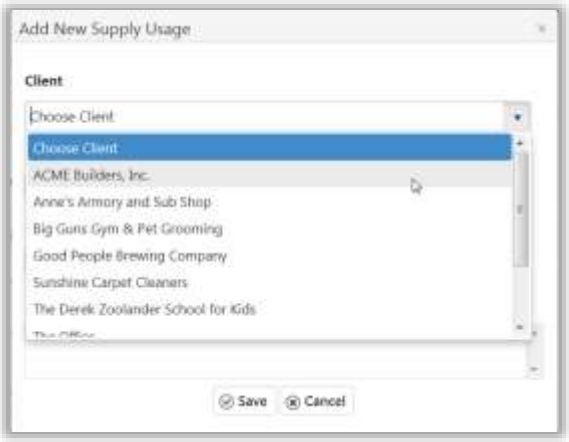


Figure 91

Select the **Manage Clients** command from the **Clients** dropdown list.

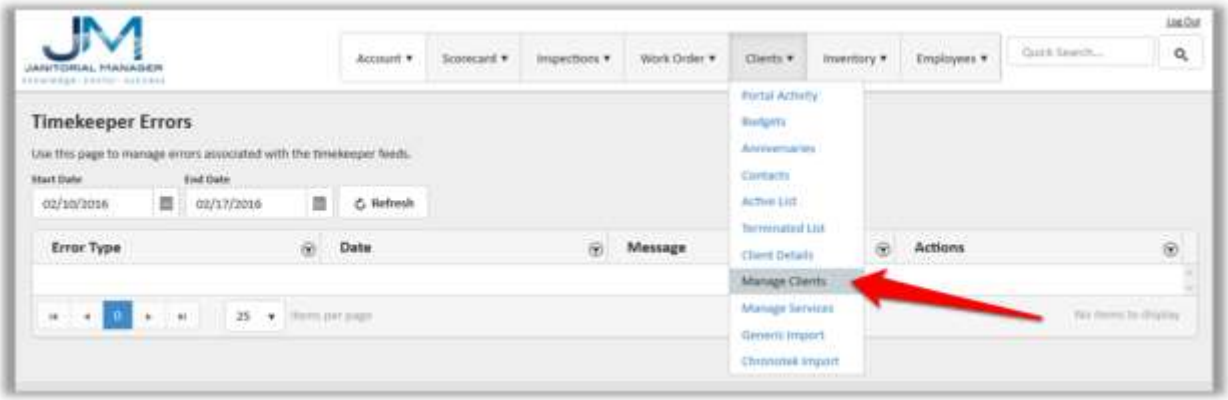


Figure 92

You will need to locate the row containing the client that needs editing and then click the **Deactivate Client** command as shown in Figure 92.

Note: For help on searching for specific clients by name - [Click Here…]

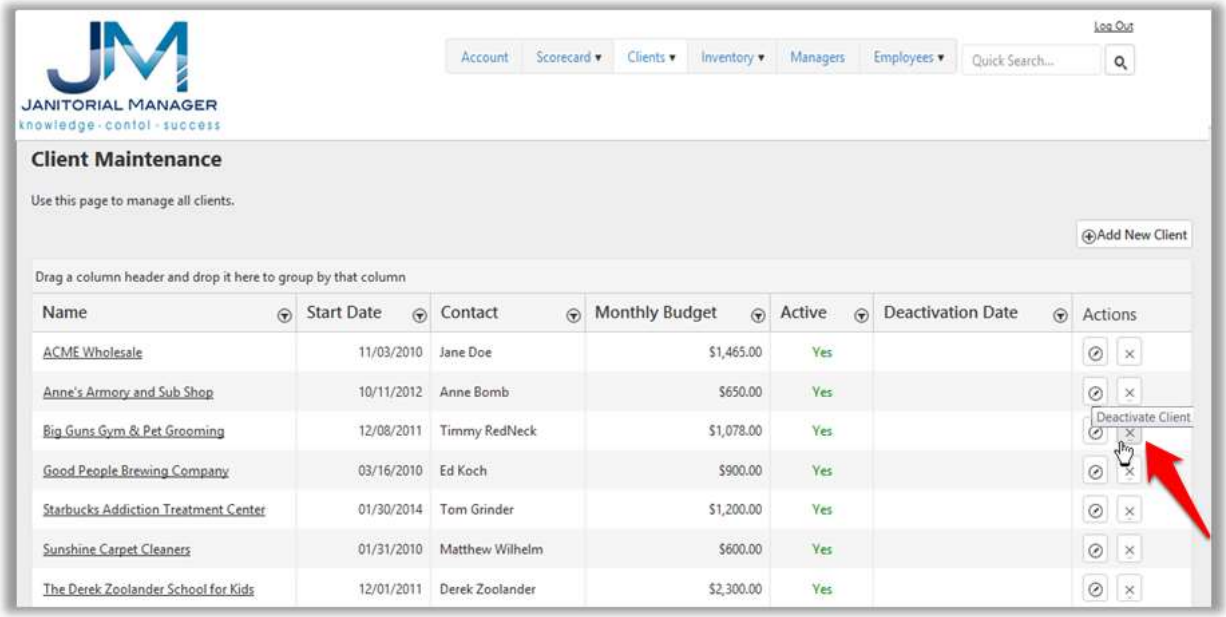


Figure 93

You should see the *Client successfully deactivated message* as shown in Figure 93.

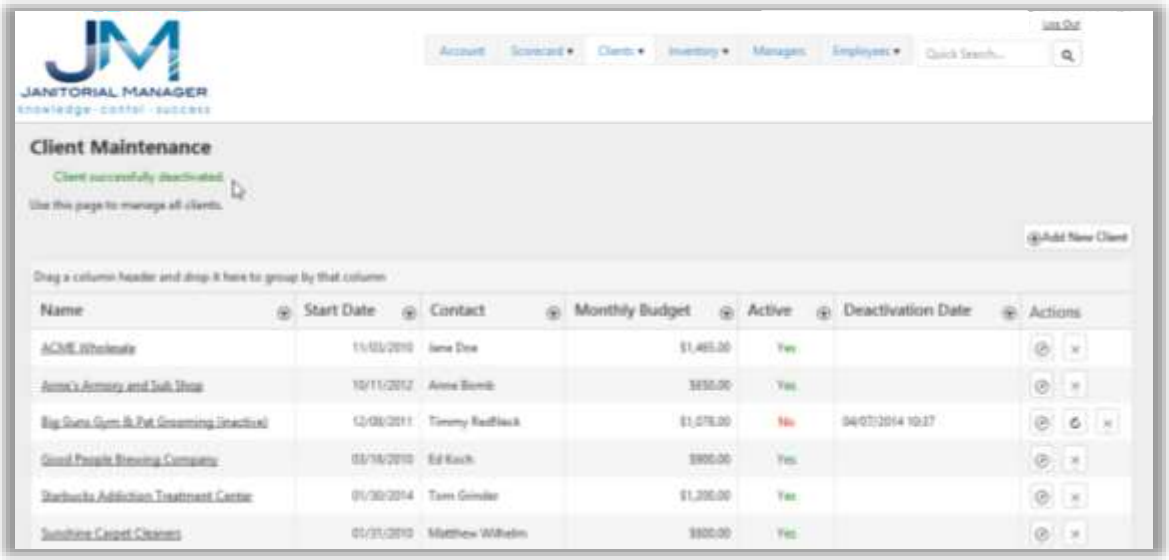


Figure 94

Re-activating a client

If a client has been de-activated, they can be activated once again.

Select the **Manage Clients** command from the **Clients** pulldown list.

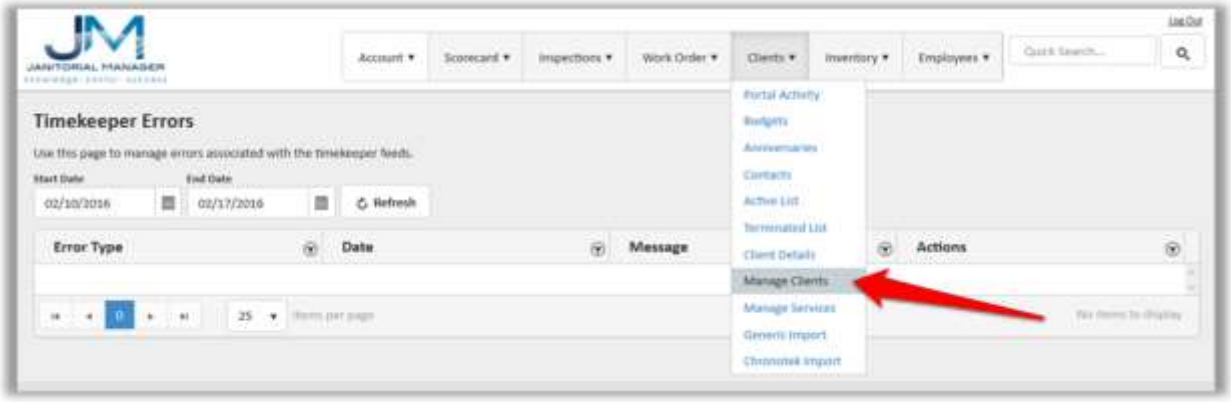


Figure 95

Locate the de-activated client that you wish to re-activate. You can sort by the **Active** column as shown below in Figure 95 or you can use the other available searching methods as described previously- [Go To Details…]

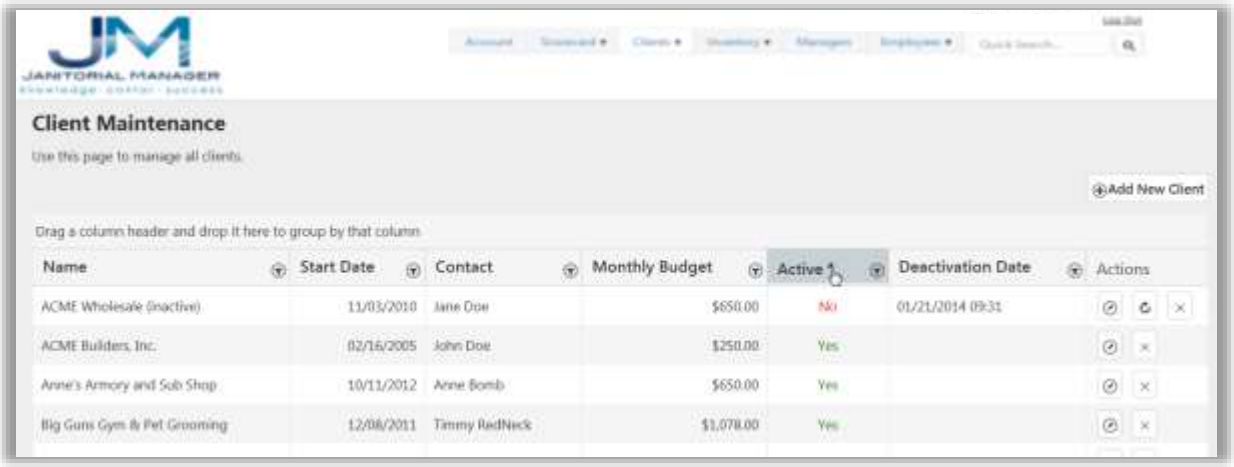


Figure 96

After locating the client, click the **Activate Client** command as shown in Figure 96.

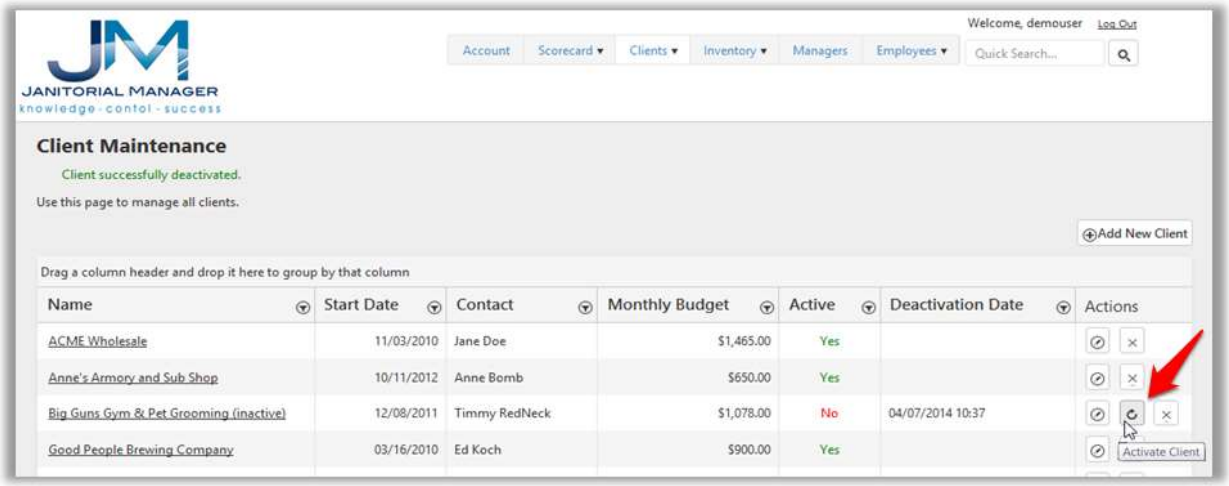


Figure 97

You should see the *Client successfully activated* message as shown in Figure 97.

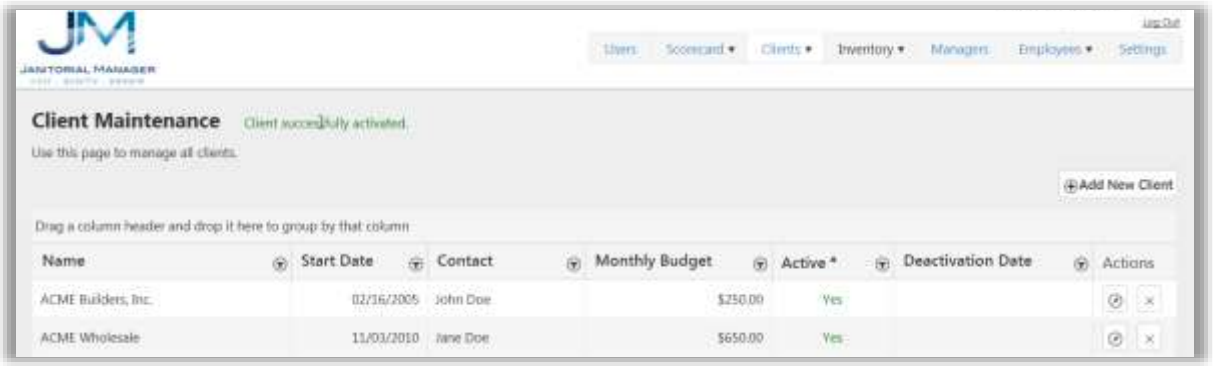


Figure 98

Deleting a client

Clients may be deleted from the system however this option should be used with great caution. All client data will be removed! The removal of this data will change Scorecard calculations and reports. **Once deleted, Client records cannot be restored!**

If a client is no longer and active customer, simply de-activate the client. This will preserve the client data for all relevant calculations and reports. See **De-activating a Client**

Select the **Manage Clients** command from the **Clients** pulldown list.

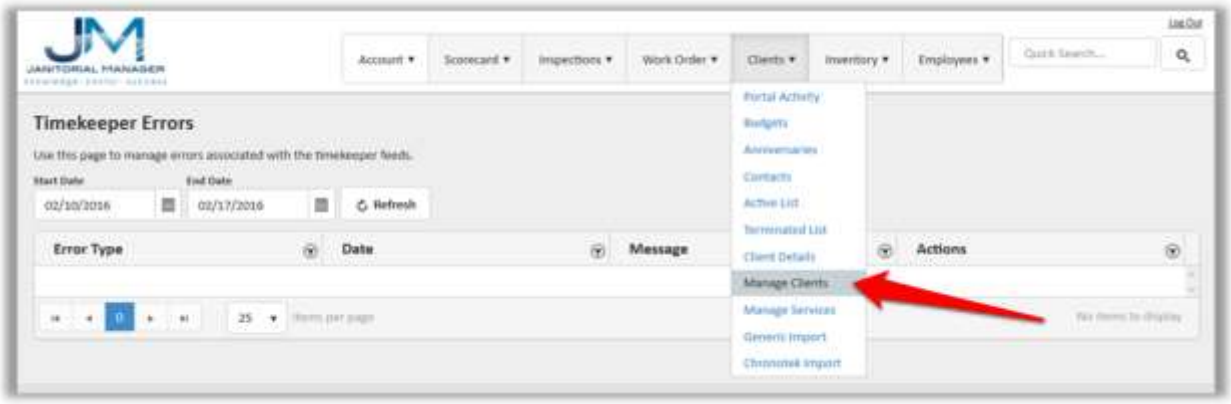


Figure 99

Locate the de-activated client that you wish to re-activate. You can sort by the **Active** column as shown below in Figure 98 or you can use the other available searching methods as described previously- Go To Details…

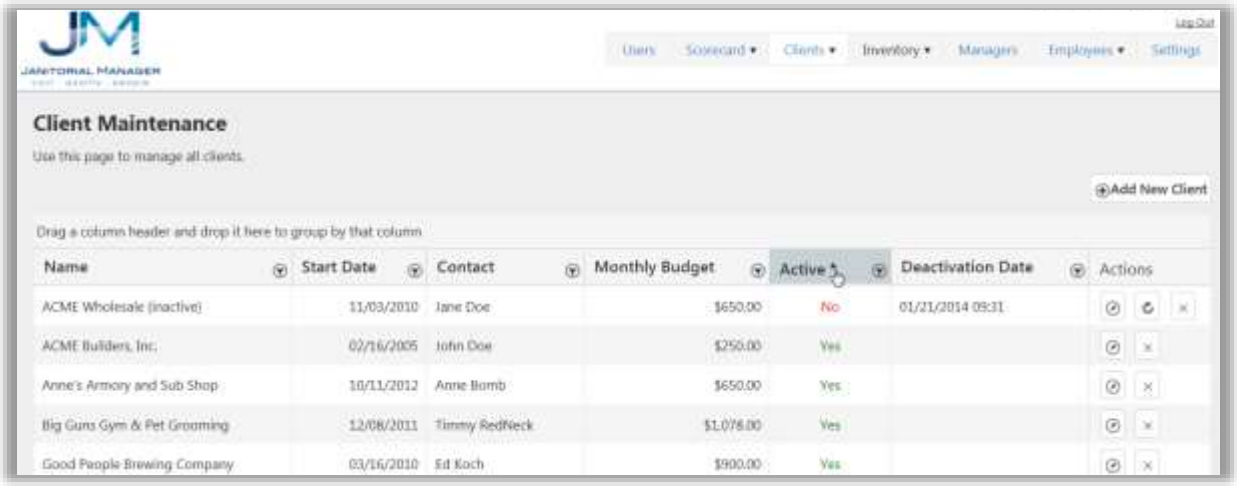


Figure 100

After locating the client, click the **Delete Client** command as shown in Figure 100.

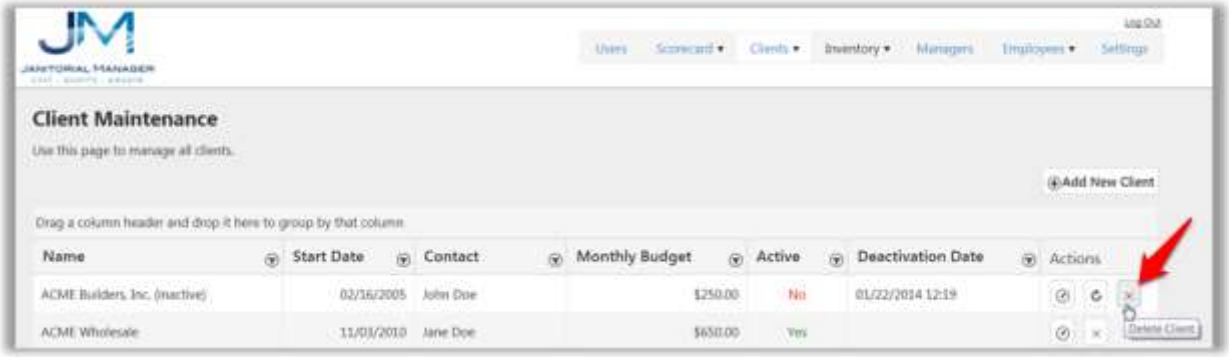


Figure 101

You will receive the following message. If you are sure you want to permanently delete the client the click the **OK** command. If yoo do not want to delete the client then click the **Cancel** command

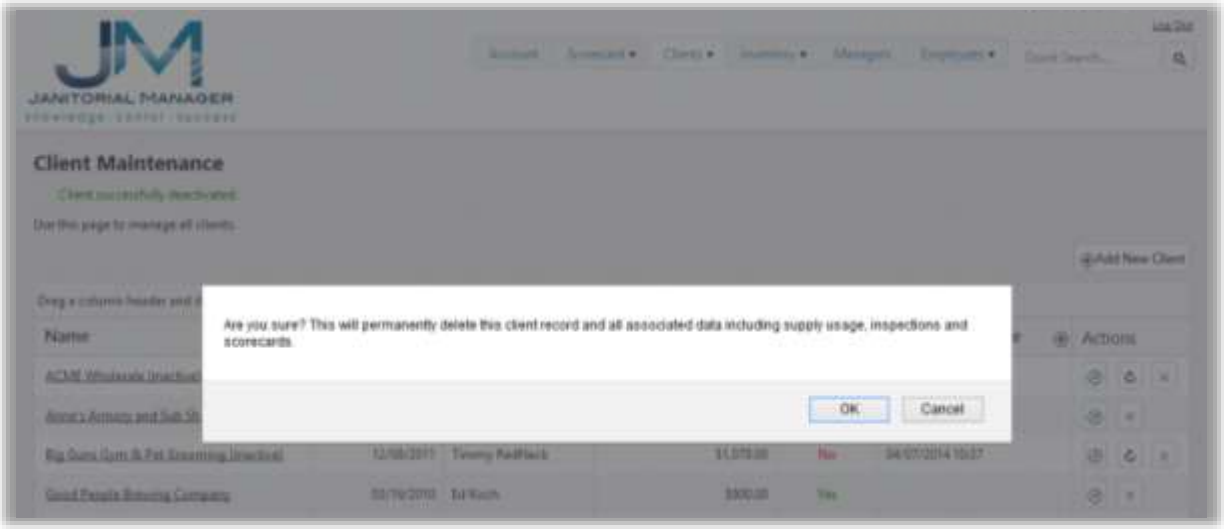


Figure 102

After the client is permanently deleted from JM, you will see the following ***Client successfully deleted*** message.

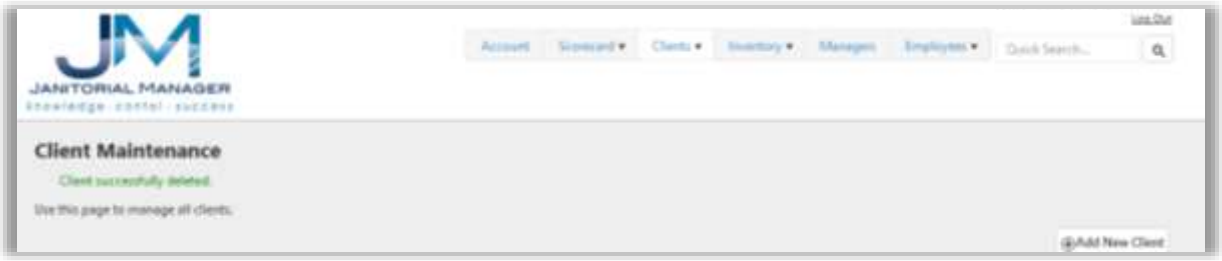


Figure 103

Manage Employees

Job Classifications

Select the **Manage Job Classifications** tab on the JM application as shown in Figure 103.

Figure 104

Enter the necessary classification in the **New Job Classification** field as shown in Figure 104.

Figure 105

To create the job classification click the **Save** button as shown in Figure 105.

Figure 106

Delete Job Classification

If necessary job classifications can be removed or deleted.

Select **Manage Job Classifications** under the **Employees** tab as shown in Figure 106.

Figure 107

The list of current Job Classifications will be displayed on the Job Classifications Maintenance.

Note: if you do not see the job classification you wish to delete, make sure the **Show All Job Classifications** checkbox is checked!

Select the **Delete Job Classification** as shown below in Figure 107 of the job classification that needs to be deleted. Deleting a job classification will remove it from the Job Class dropdown list when adding/editing employee information.

Figure 108

Edit Job Classification

After a job classification has been created, the job classification "name" can be edited.

Select **Manage Job Classifications** under the **Employees** tab as shown in Figure 108.

Figure 109

Select the **Edit Job Classification** button of the job classification that you need to change the name as shown in Figure 104.

Figure 110

Adding New Employee

JM can be used to track a tremendous amount of information regarding the employees that work for your company. The first step is to add each employee and their pertinent information into JM.

Note: To add a new employee, you must be logged into the JM application with sufficient user privileges!

Note: Before a new employee can be added, you must define at least one *Job Classification*! Go to the **Manage Job Classification** to set up job classifications.

Select the **Manage Employees** tab on the JM application as shown below in Figure 110.

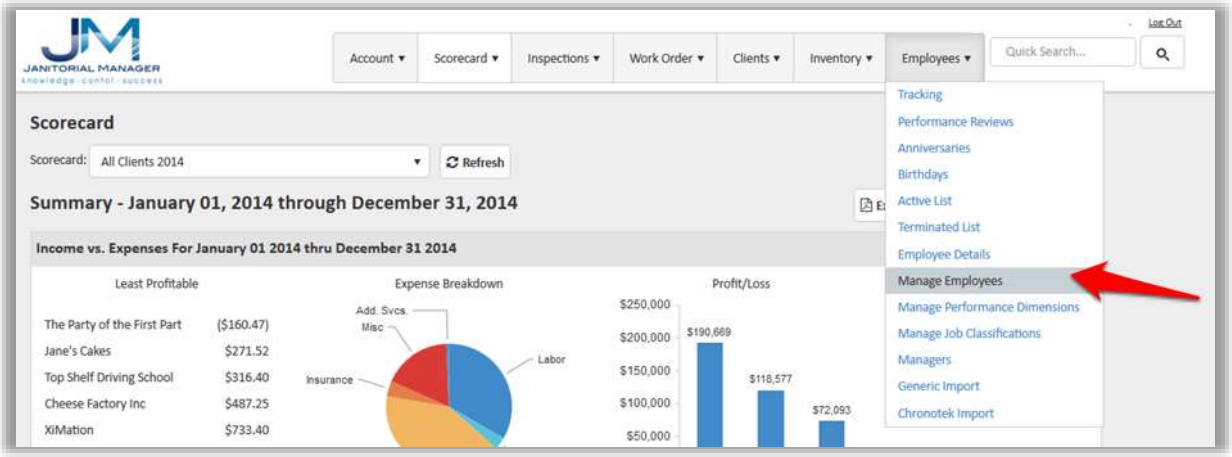


Figure 111

A list of current employees will be displayed as shown below in Figure 111.

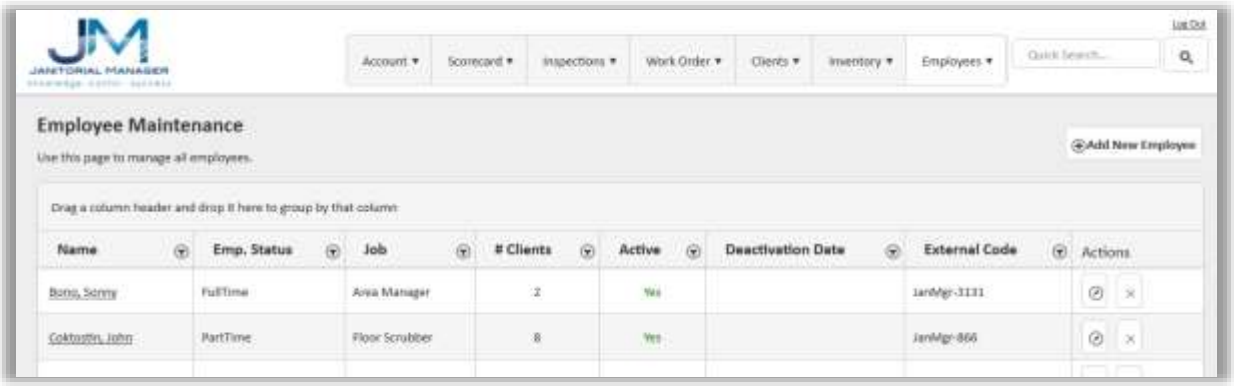


Figure 112

To add a new user, select the **Add New Employee** button as shown in Figure 112.

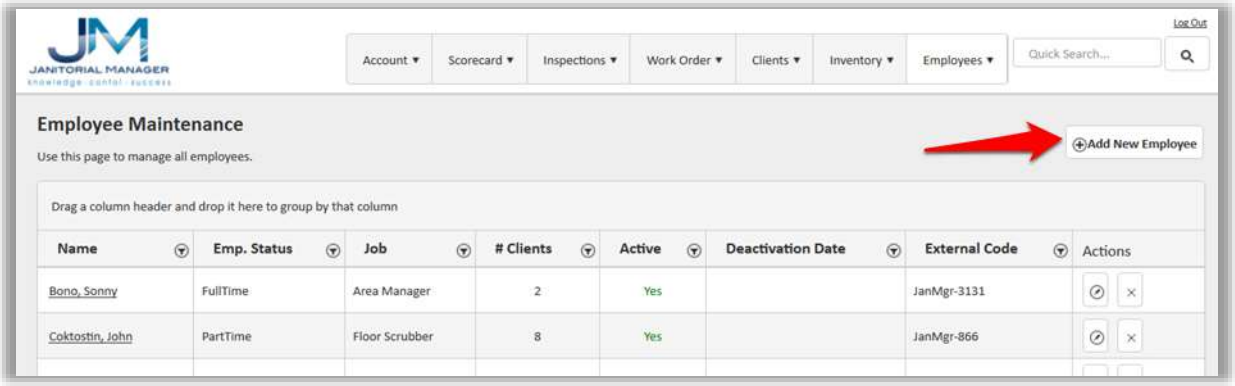


Figure 113

Add the information for the employee. All fields shown in Figure 113 must be filled out with valid information including the first name, last name, social security number, address,etc.

After all the employee information has been entered, click the **Save** button to create the employee record.

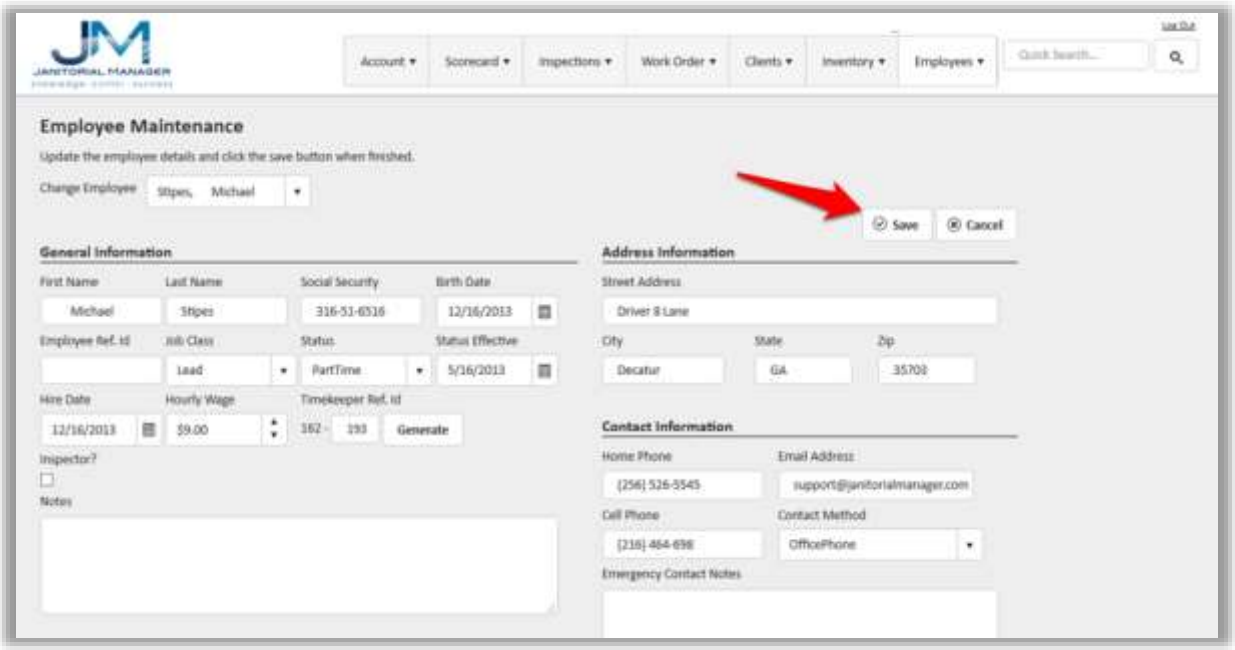


Figure 114

Note: Sensitive information such as the employees social security number will be masked at all times with the exception of when the employee is being added.

Import Employees

Note: Employee import should only be used during initial company setup!

Download the Employee Import Instruction Spreadsheet

Select the **Import** command from the **Employee** dropdown list as shown in Figure 114 below.

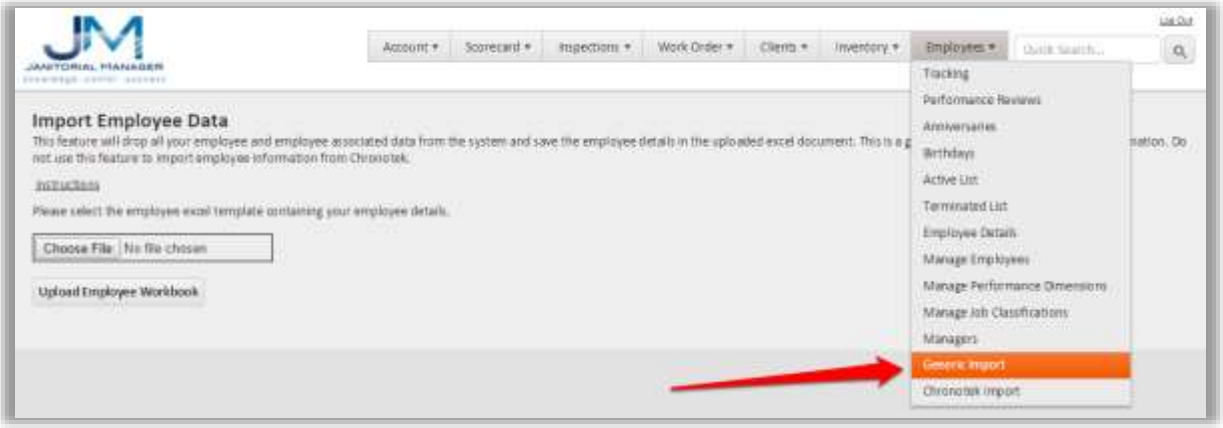


Figure 115

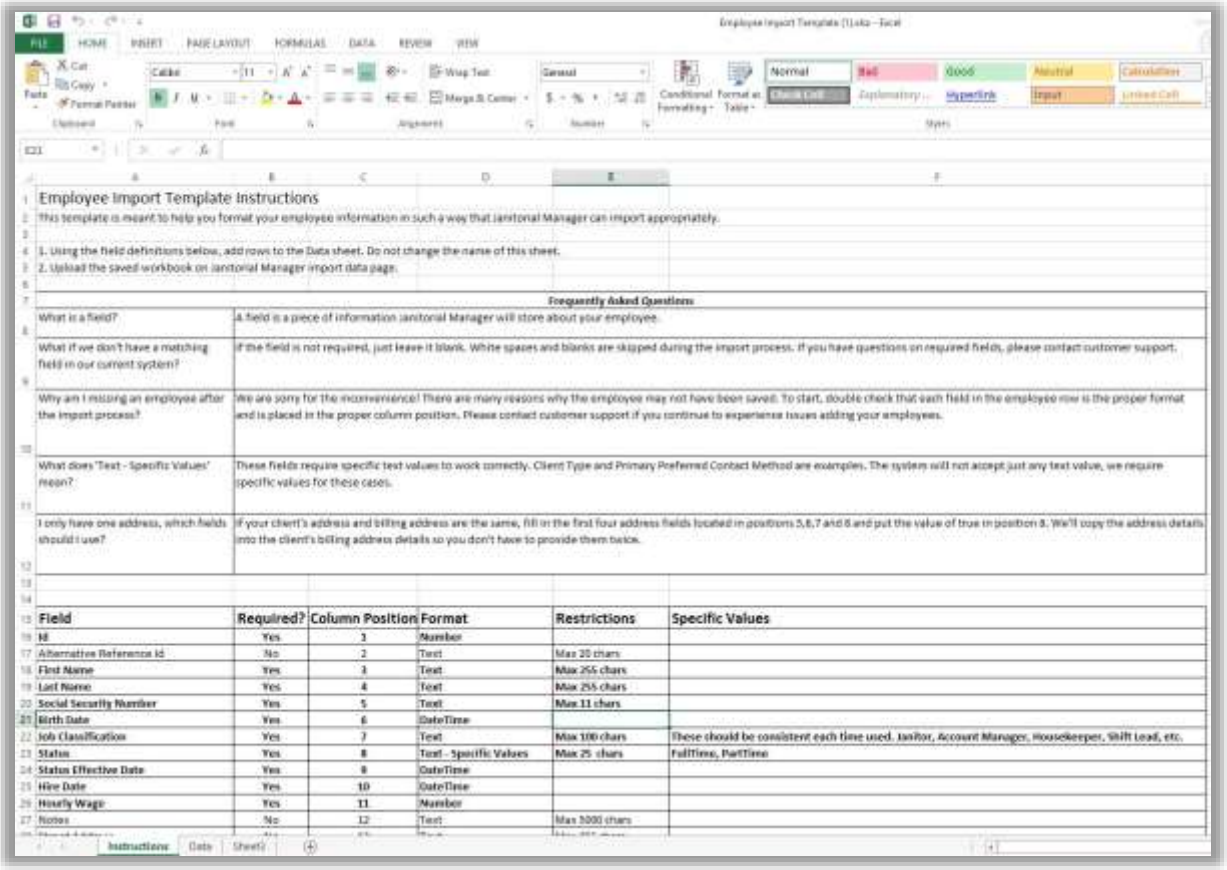
The form shown in Figure 115 will be displayed. From this form select the ***Instructions*** link.

Figure 116

Note: Depending on which browser you are using and what your browser's security settings are you might have to edit some options to allow the Excel spreadsheet to be downloaded to your machine. The following descriptions will demonstrate how to save the Employee Import Template.xlsx file that will be downloaded from Janitorial Manager depending on whether you are using Chrome, Firefox and Internet Explorer.

Populate Employee Data in Import Spreadsheet

After downloading the document, you can open the spreadsheet using the Microsoft Excel application as shown below.



Employee Import Template Instructions

This template is meant to help you format your employee 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 employee.
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 an employee after the import process?	We are sorry for the inconvenience! There are many reasons why the employee may not have been saved. To start, double check that each field in the employee 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 employees.
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 9. 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		
Alternative Reference Id	No	2	Text	Max 20 chars	
First Name	Yes	3	Text	Max 255 chars	
Last Name	Yes	4	Text	Max 255 chars	
Social Security Number	Yes	5	Text	Max 11 chars	
Birth Date	Yes	6	DateTime		
Job Classification	Yes	7	Text	Max 100 chars	These should be consistent each time used. Janitor, Account Manager, Housekeeper, Shift Lead, etc.
Status	Yes	8	Text - Specific Values	Max 25 chars	FullTime, PartTime
Status Effective Date	Yes	9	DateTime		
Hire Date	Yes	10	DateTime		
Hourly Wage	Yes	11	Number		
Notes	No	12	Text	Max 3000 chars	

Figure 117

The first sheet in the excel file is named "Instructions". This as you would expect contains instructions for the import process including some frequently asked questions, required data and optional data.

The second sheet name "Data" contains the information that will be imported into the JM application for your company.

The following chart shows the required data for each employee. The import will generate an error if any of the employees are missing any of the required information.

Field	Restrictions
Id	
First Name	Max 255 chars
Last Name	Max 255 chars
Social Security Number	Max 11 chars
Birth Date	
Job Classification	Max 100 chars
Status	Max 25 chars
Status Effective Date	
Hire Date	
Hourly Wage	

Figure 118

Note: The ID column should be a unique number (integer) assigned to each employee. Typically, this should be simply incremented by one for each employee in the spreadsheet.

WARNING: Do not modify the sheet names in the excel file, the column headers, or leave empty rows in the data (employee information, one row per employee, should be continuous rows on the sheet without any empty rows within the data).

Upload the Employee Spreadsheet

After you have filled out the Data sheet for each of your employees, both the required information and the optional information, save the excel spreadsheet.

Select the **Choose File** command as shown in Figure 118. A familiar Windows dialog will appear. In this dialog browse to the folder location and then select the specific xslx location containing the excel file containing your employee data.

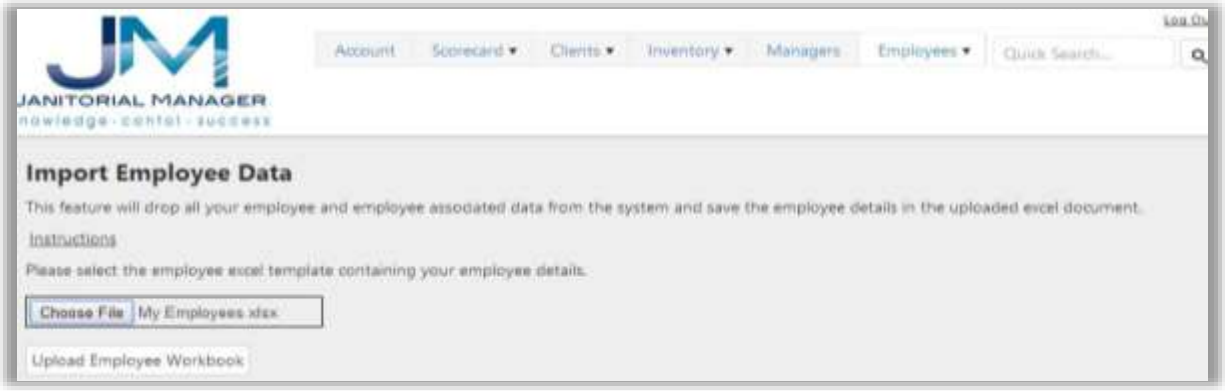


Figure 119

Select the **Upload Employee Workbook** command to actually import or transfer the client data from the excel spreadsheet into the JM application.

A possible error that you might receive is shown below in Figure 119.

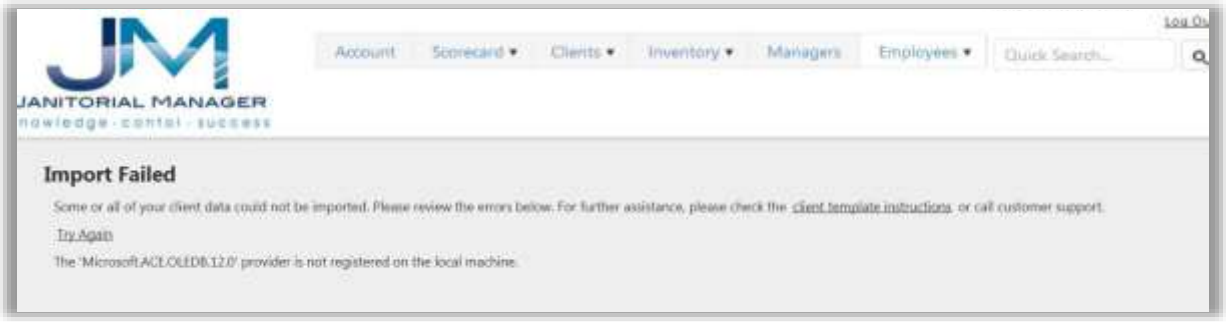


Figure 120

If you happen to receive the above error, you will need to download the following Microsoft Update from the link http://www.microsoft.com/en-us/download/details.aspx?id=13255

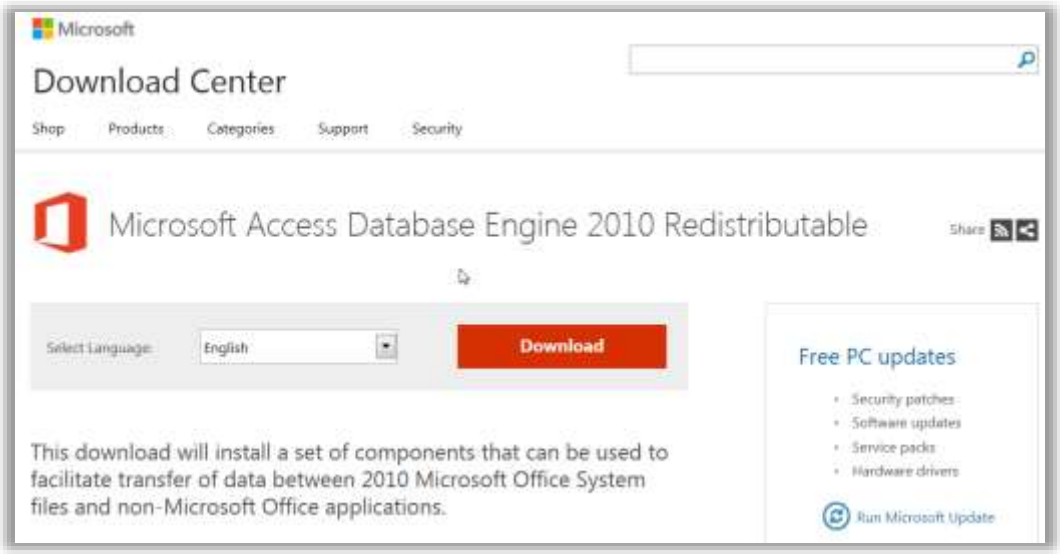


Figure 121

Before the download can begin you will need to specify whether you need the 32 bit (AccessDatabaseEngine.exe) or the 64 bit (AccessDatabaseEngine_x64.exe). If you are running 32 bit Office products then you will need to install the 32 bit and likewise if you are running 64 bit Office products then you will need to install the 64 bit version.

If you are not sure select the 32 bit download. If you try to install this and you are running 64 bit Office then a message will be display during installation informing you of this. In this case simply restart the process after downloaded the correct 32 bit or 64 bit download.

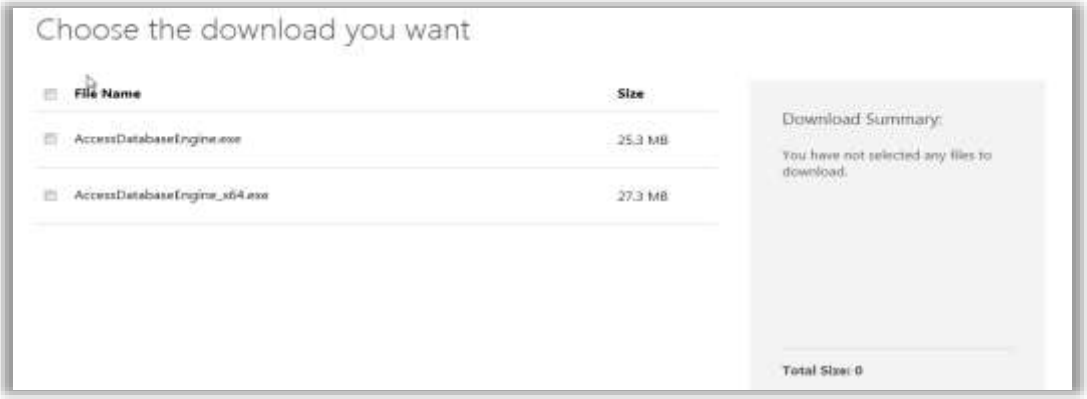


Figure 123

Select the Run command to install this on your computer.

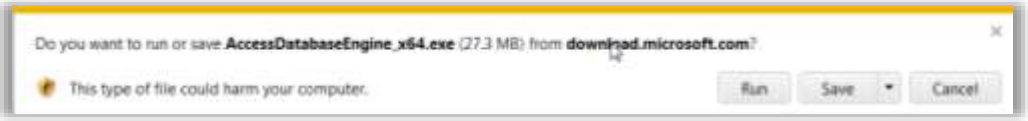


Figure 122

Note: Depending on your current browser's security setting, you might have to adjust to allow installing this your computer.

To begin the installation:

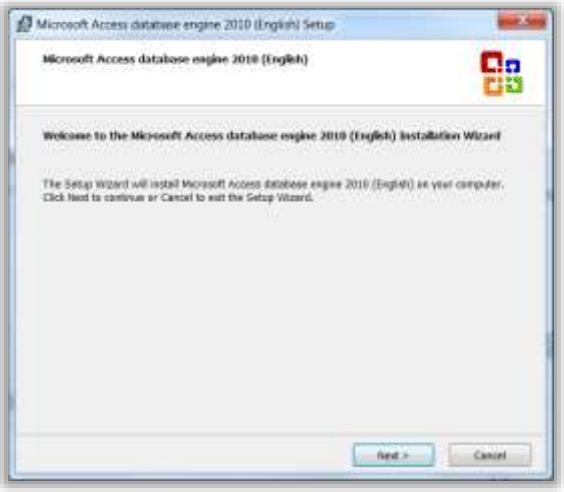


Figure 124

Select the Next button and continue answering the prompts to finish the install.

Note: During installation you might receive a message that you should close some applications if they are running that might interfere with the installation process. If you get this message just close the specified applications after saving them and continue the install process.

Edit Employee

After an employee has been added to JM, the employee's detailed information can be edited to reflect any changes needed to his/her employee details.

Select the **Manage Employees** under the **Employees** tab on as shown in Figure 124.

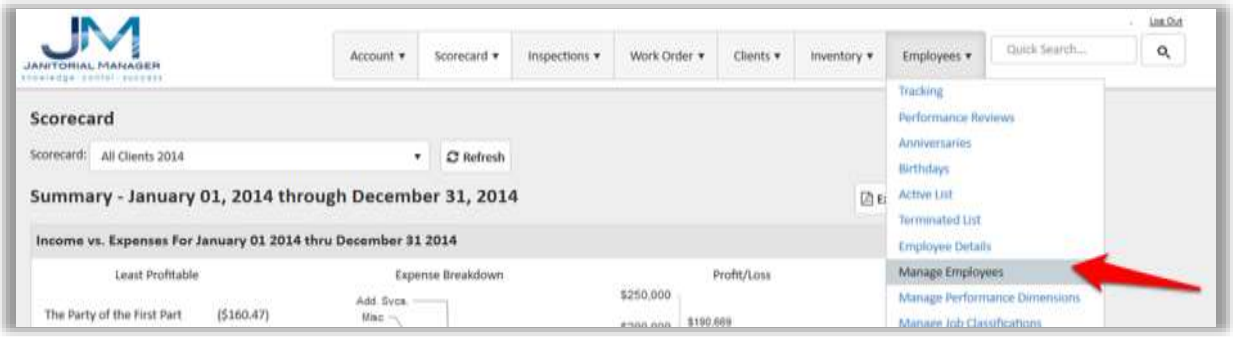


Figure 125

A list of employees will be displayed as shown in Figure 125.

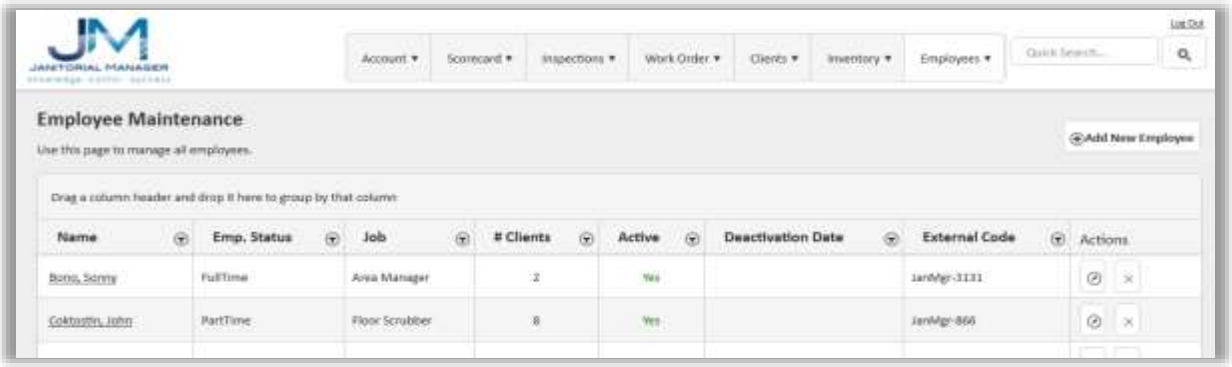


Figure 126

Locate the row representing the particular employee whose information that needs to be edited. Once the row containing the employee that needs to be edited has been located, click the **Edit Employee** command as shown in Figure 126.

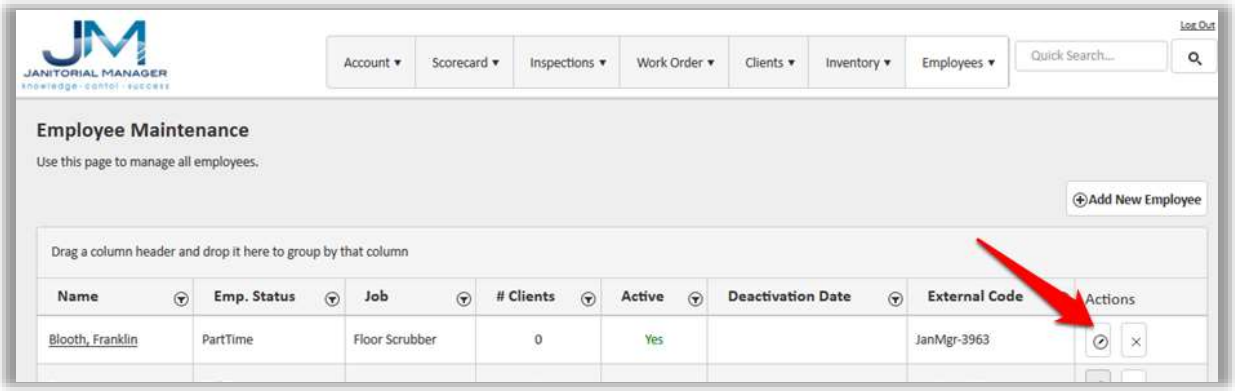


Figure 127

Return to Table Of Contents

Search for employee

You can use the following tools to locate the desired client in the list.

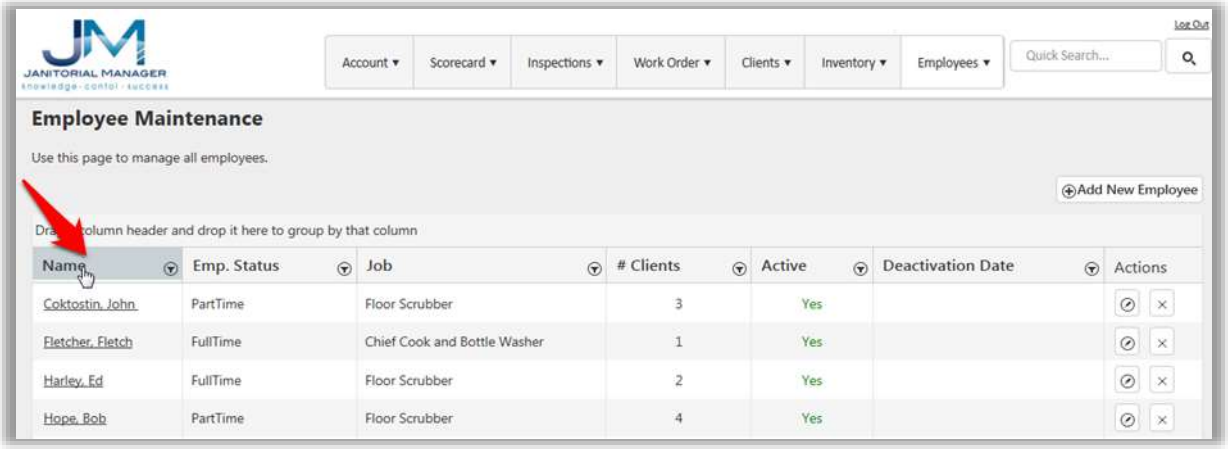


Figure 128

You can sort the NAME column in ascending or descending order by clicking in the name column as shown above in Figure 127.

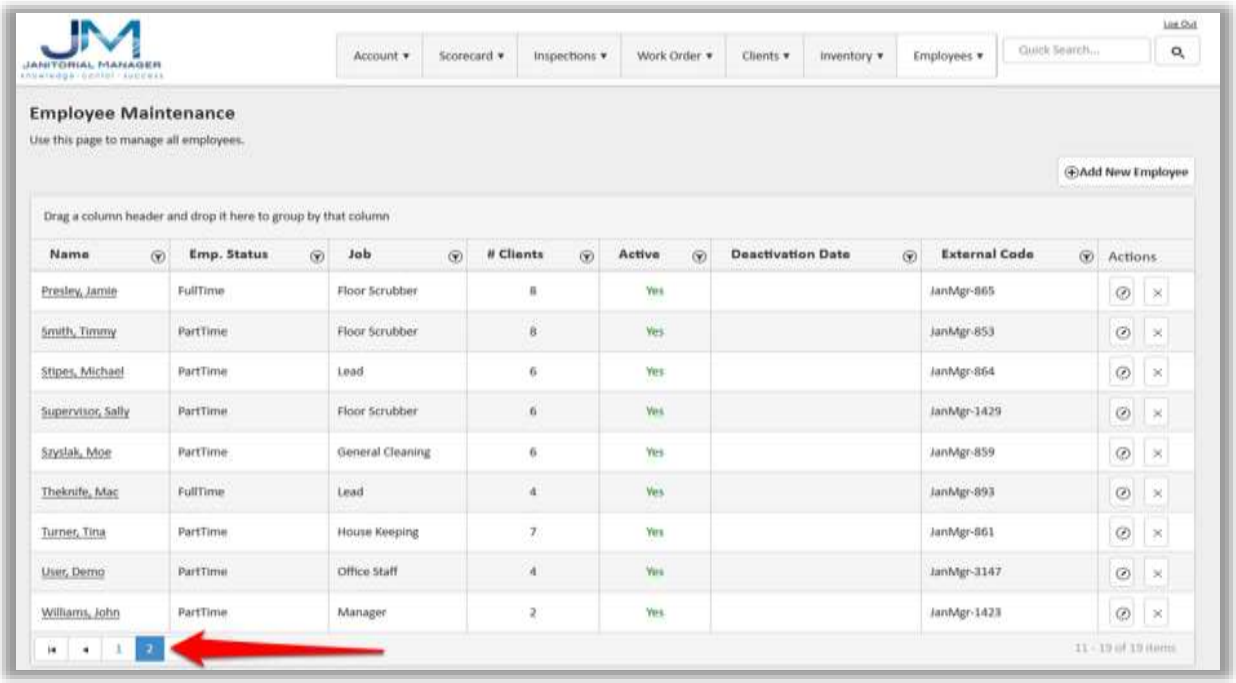


Figure 129

You can switch between pages by selecting the specific page number shown of moving forward/backward by selecting the arrow buttons. You can either advance one sheet at a time or move all the way to the first/last sheet. Figure 128.

You can search/filter for the specific client based on the name.

Click the filter icon in the **NAME** column as shown in Figure 129.

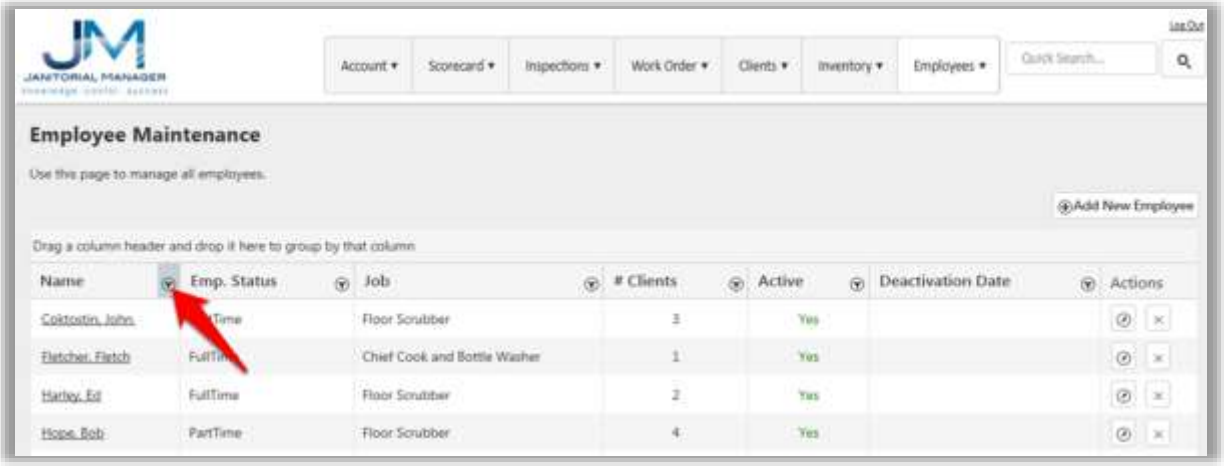


Figure 130

The following form will be displayed.

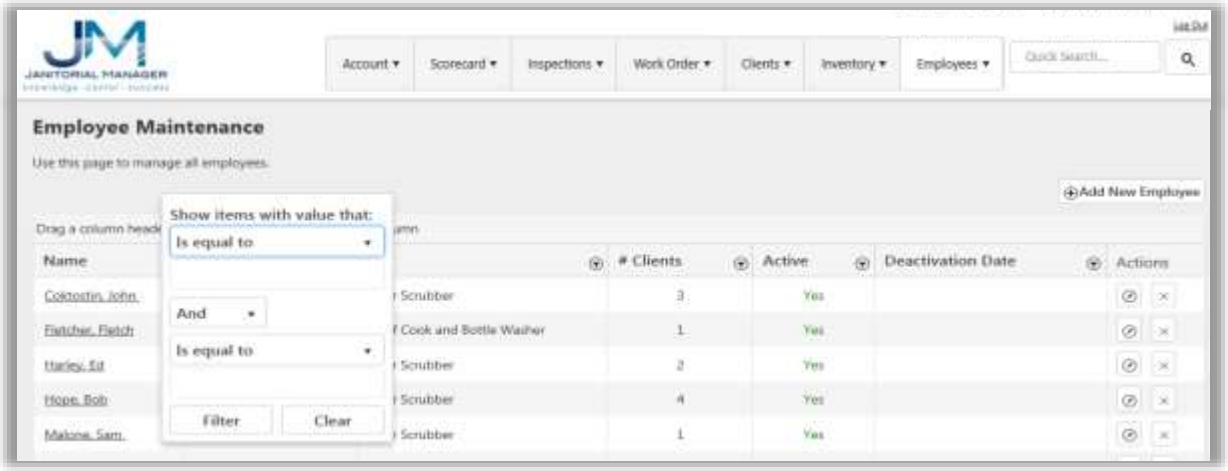


Figure 131

In the **Show items with value that:** dropdown list select **"Contains"**

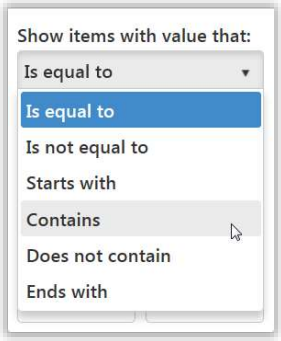


Figure 132

In the value field enter “turner” The name of the employee that you are looking to edit. Click the **Filter** command

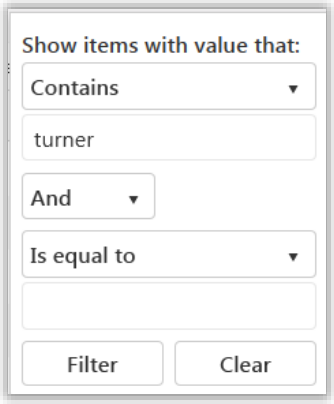


Figure 133

Notice all the entries that are shown are only the ones were “Turner” are contained in the name. The other entries have been temporarily filtered out.

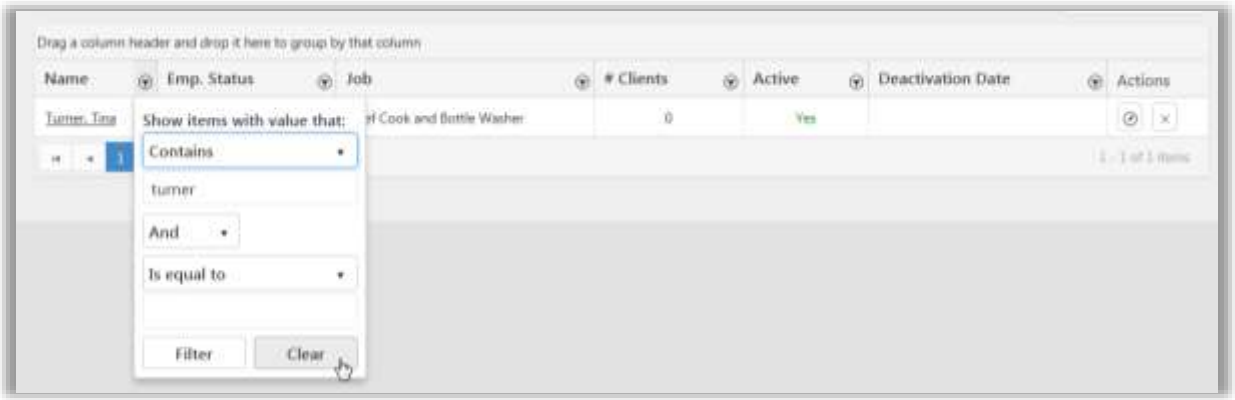


Figure 134

To remove or clear the filter so ALL entries are displayed again, simply click the **Clear** button

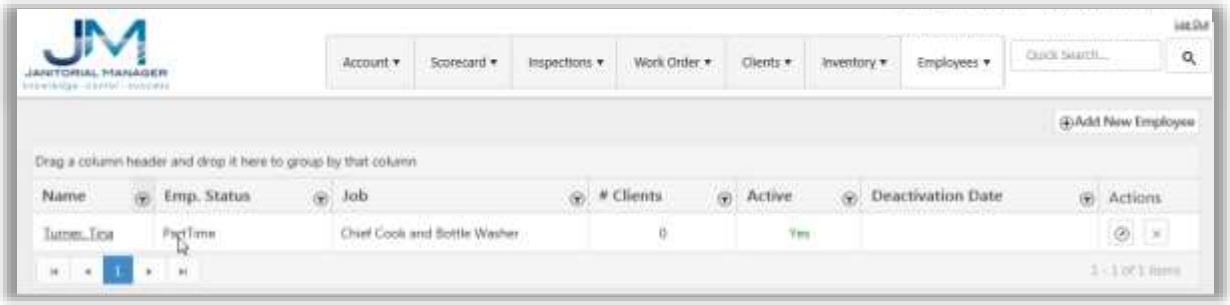


Figure 135

Deactivate an Employee

After employees are created using JM, any employee can be deactivated in the event that they no longer work for your company.

Select **Manage Employees** in the **Employees** tab on the as shown in Figure 136.

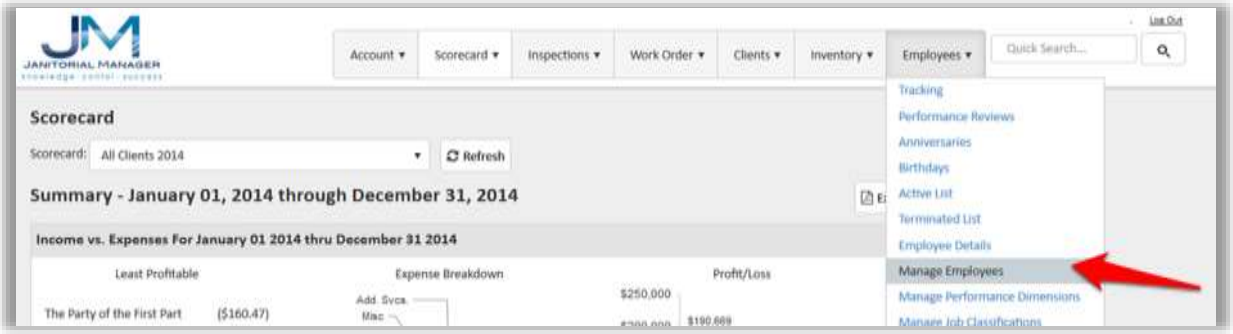


Figure 136

After locating the row containing the employee to be terminated, click the **Deactivate Employee** button as shown below in Figure 137.

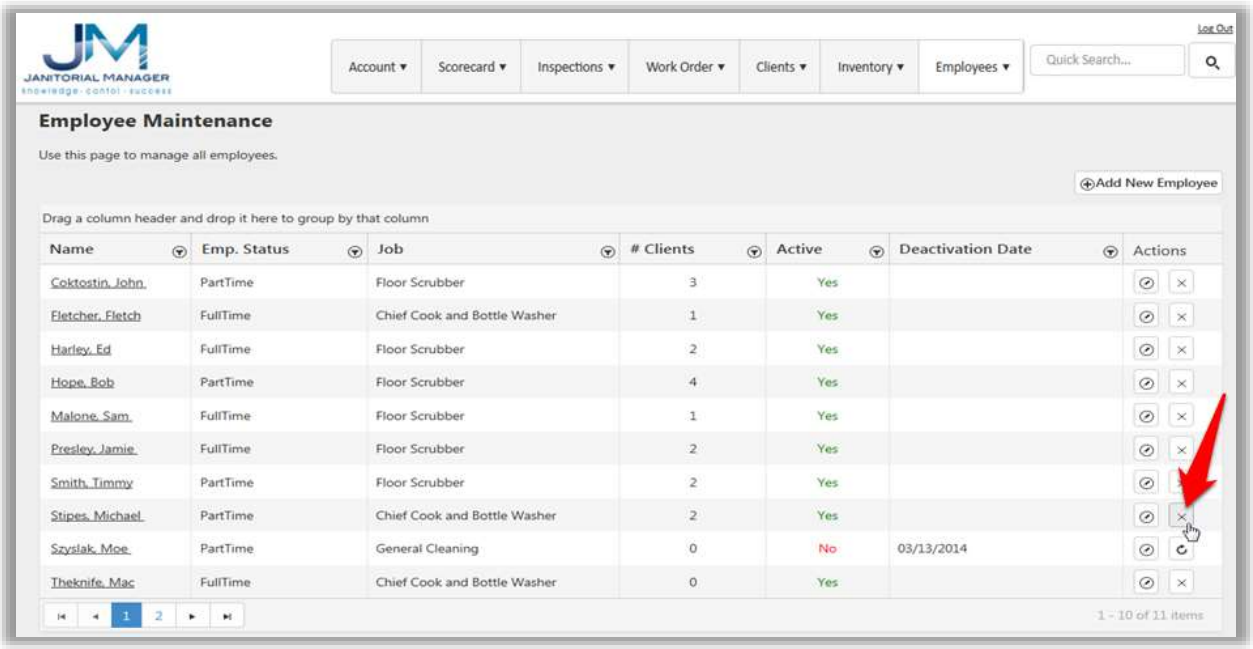


Figure 137

Enter any information on why the employee is being terminated for future reference and the termination date as shown below in Figure 138.

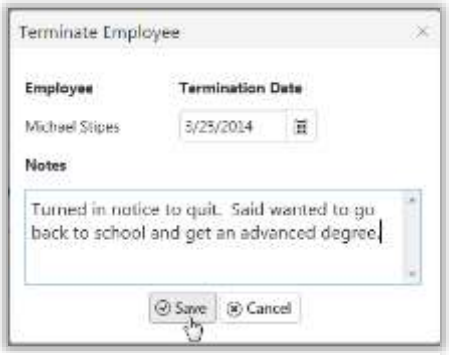


Figure 138

After providing the necessary termination information, click the **Save** button as shown above.

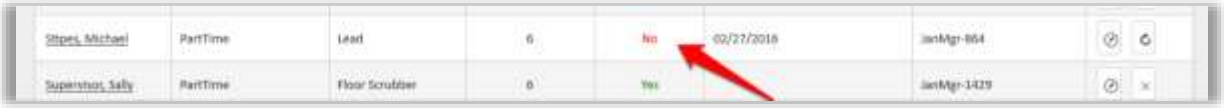


Figure 139

The Employee is now designated as deactivated as seen in Figure 139 above.

Deactivating an Employee Who is an Inspector

If the employee being deactivated has been designated as an inspector and has been assigned to inspections the following options will be provided. See figure 140.

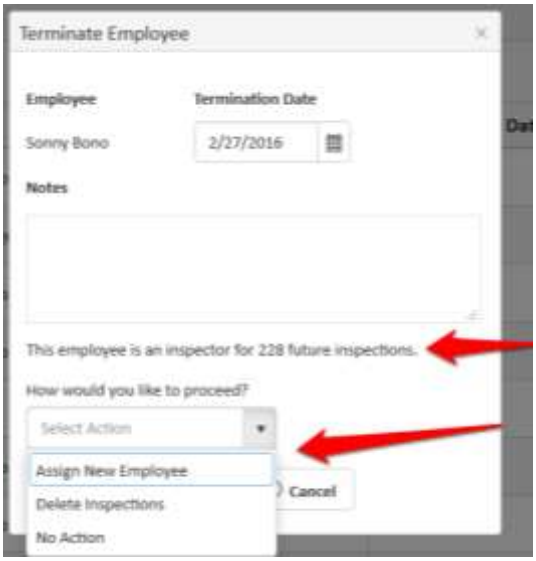


Figure 140

Re-activate an Employee

If an employee has in the past left your company and is re-hired, you can re-activate that employee and then edit to make any required changes to the previous employee information.

Select **Manage Employees** in the **Employees** tab on the as shown in Figure 141.

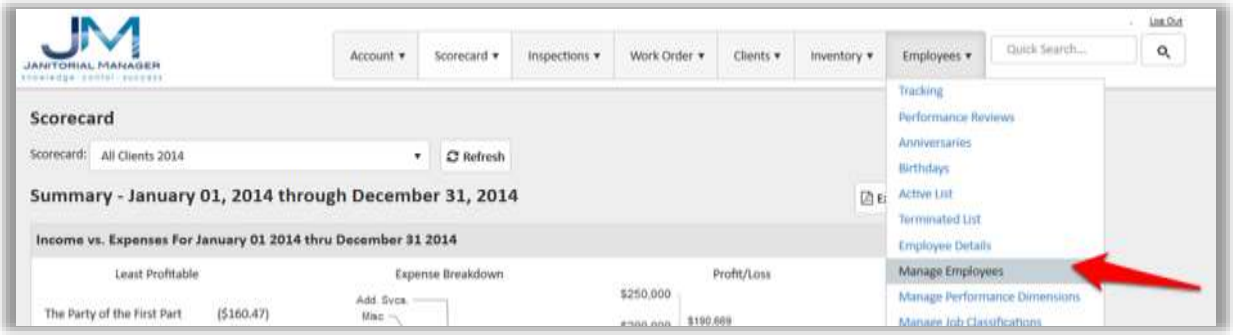


Figure 141

After locating the row containing the previously deactivated employee, click the **Activate Employee** button as shown below in Figure 142.

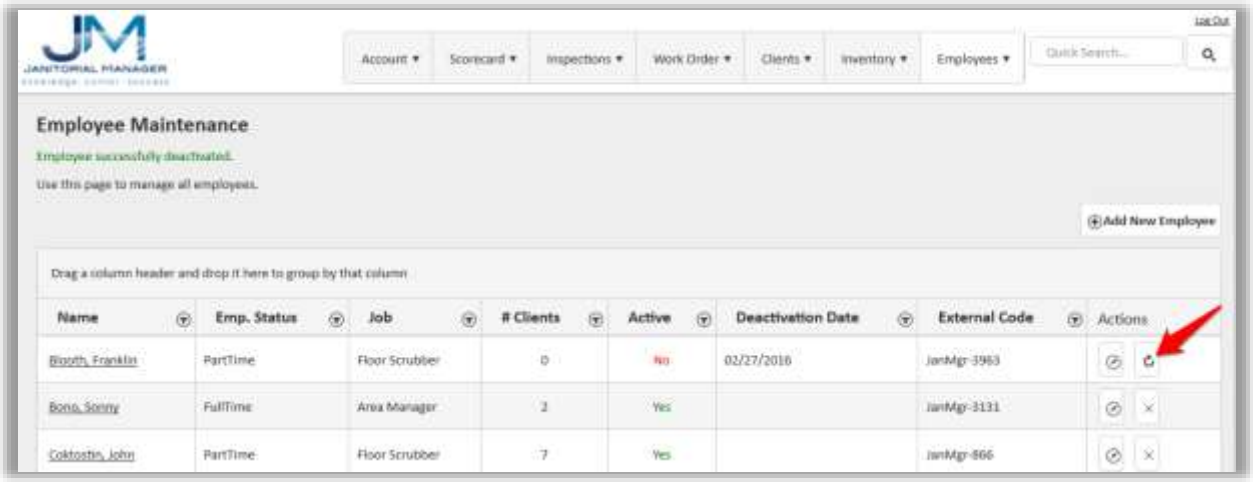


Figure 142

The Active column will be change from “No” to “Yes” which indicates the employee in now re-activated.

Figure 143

Employee Tracking

JM provides powerful employee performance tracking tools.

The **Employee Tracking** page is used to view the history of employee performance for a given period of time.

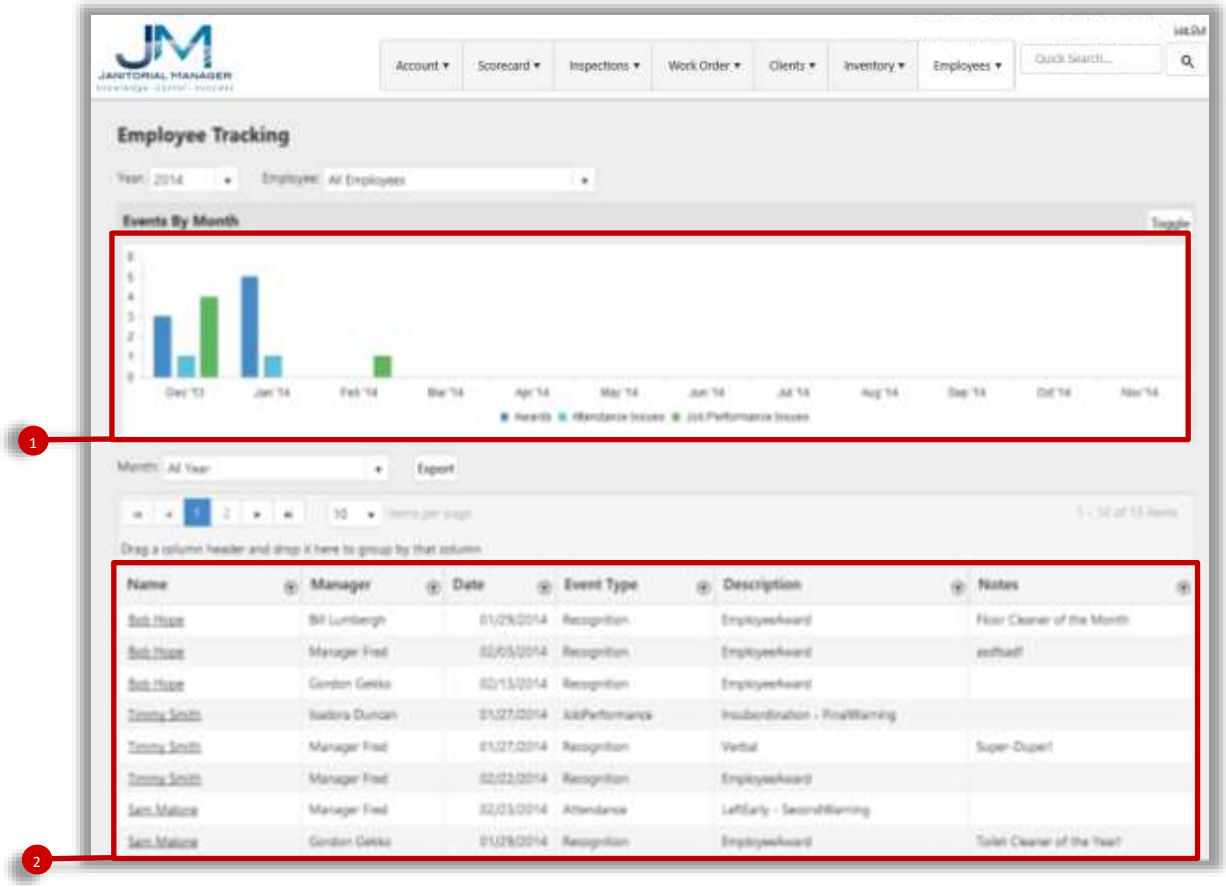


Figure 144

1. The **Employee Tracking** graph displays *Awards, Attendance Issues,* and *Job Performance Issues* by month for the slected period time.
2. The **Employee Tracking** chart shows *Awards, Attendance Issues,* and *Job Performance* by employee and month for the selected period of time.

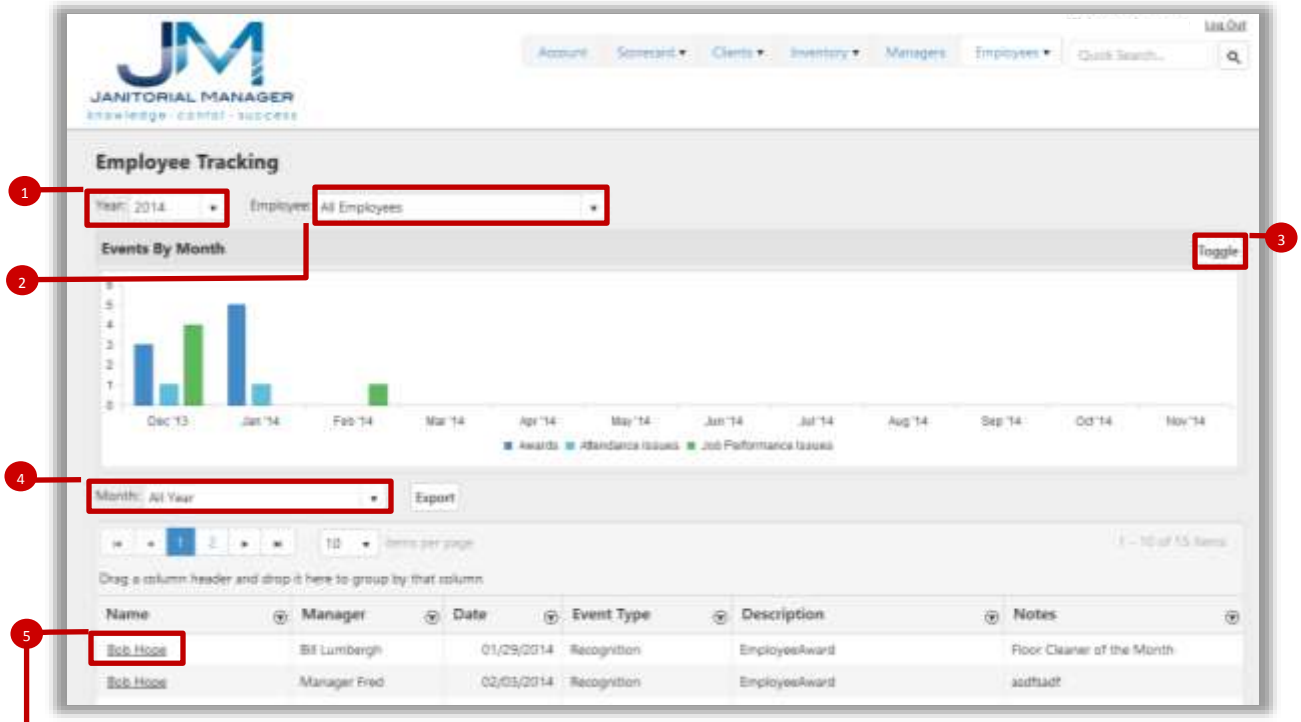


Figure 145

On the **Employee Tracking** page:

1. Use the *Year* drop down box to select the desired year.
2. Use they *Employee* drop down box to select All Employees or select a specific employee.
3. Use the *Toggle* button to turn the graph on and off.
4. Use the *Month* tab to select All Year or a specific month.
5. Click on an employee to navigate to **Employee Details**.

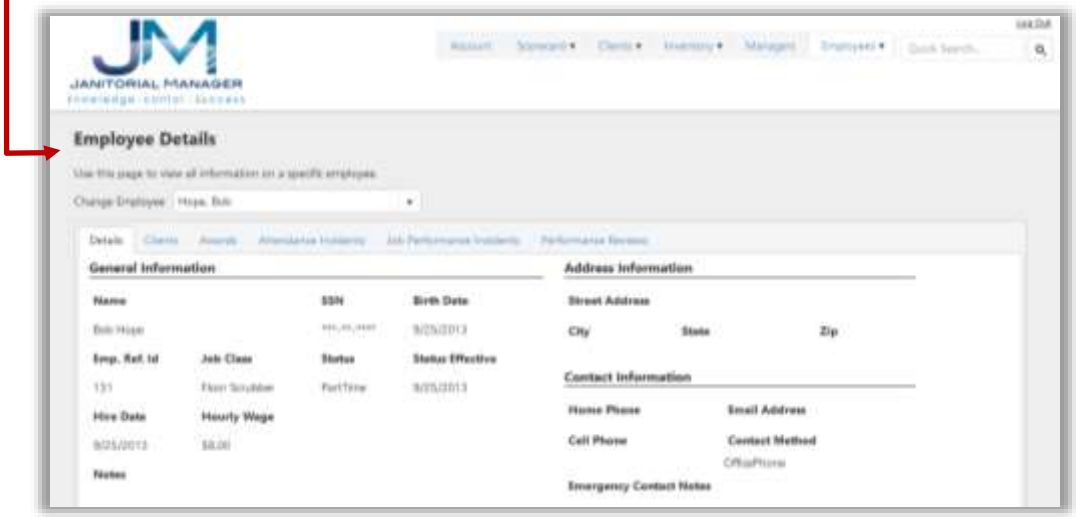


Figure 146

Employee Details

On the **Employee Details** page, the pertinent information concerning the employee can be viewed.

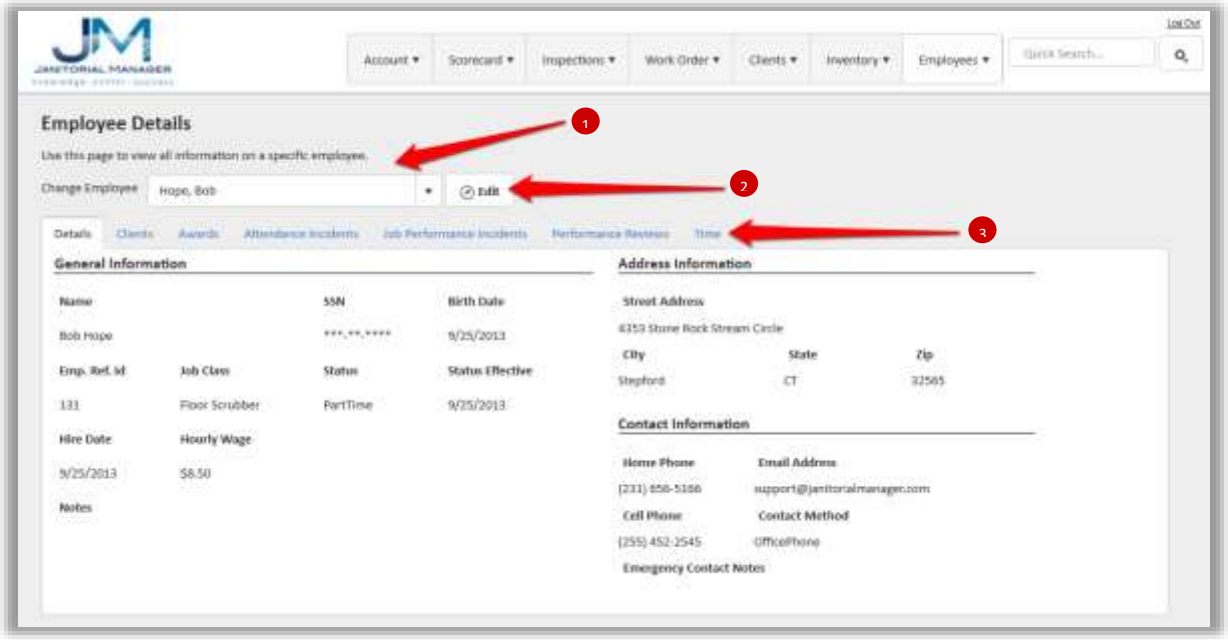


Figure 147

1. Use they *Change Employee* drop down box to select an specific employee.
2. Use the Edit button to return to and edit the main employee record.
3. Use the tabs to navigate to *Clients, Awards, Attendence Incidents, Job Performance Incidents* and *Performance Reviews.* The *Time* tab is used to review hours clocked by the selcted employee and is only available to Chronotek users.

Employee Details – Client Account Assignment and Training

From the **Employee Details** page, select the *Clients* tab as seen below.

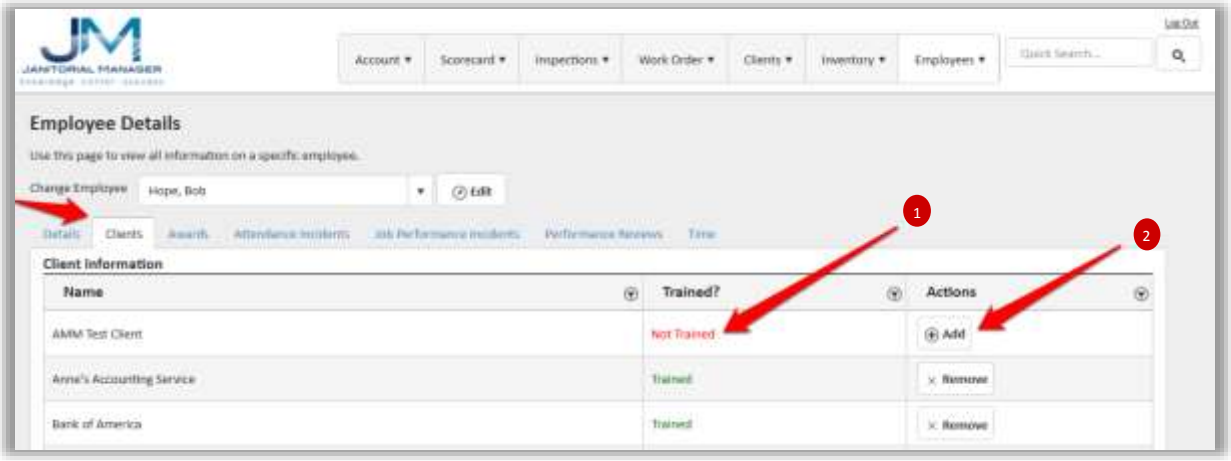


Figure 148

1. The *Trained* column shows which Client accounts this employee has beened trained to clean.
2. To change an employee's training status, click the *Add* button to change their status to "Trained". Click the *Remove* button, to change their status to "Not Trained".

Employee Awards and Recognition

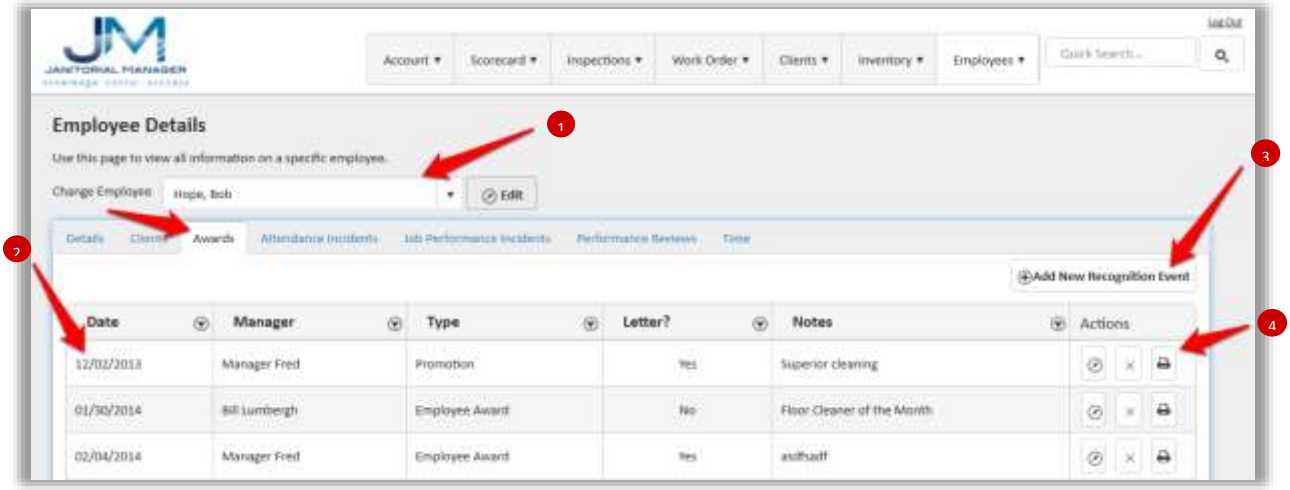


Figure 149

1. Use the *Change* Employee drop down box to select an Employee.
2. View Employee award history.
3. Use the *Add New Recognition Event* button to create a new event.
4. Use the *Edit* button to edit the record, the *Delete* button to delete a record, and the *Print* button to create a printable form for the selected record.

Adding a New Employee Recognition Event

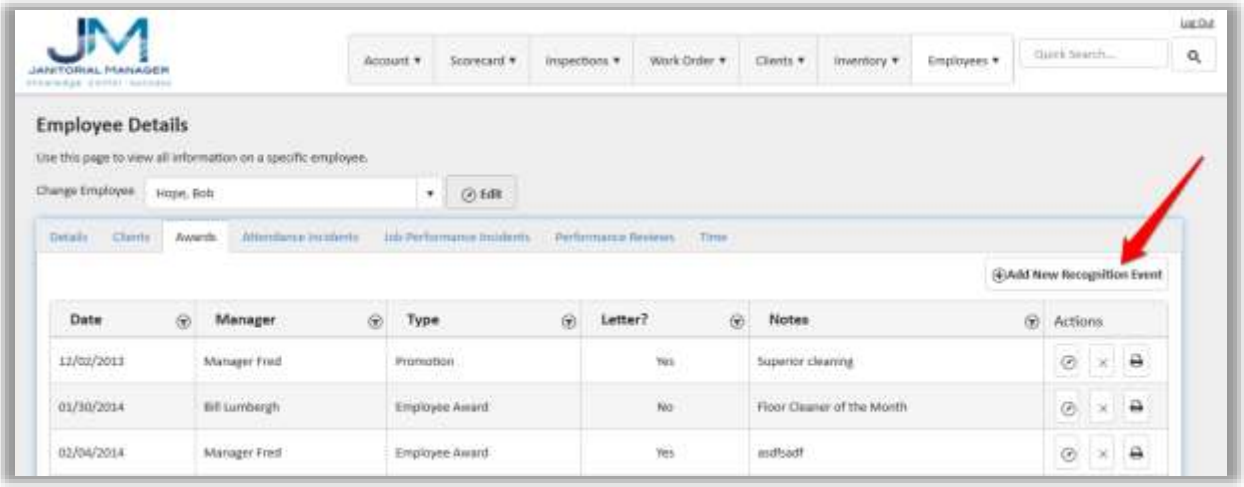


Figure 150

To create a new recognition event, select the *Add New Recognition Event* button.

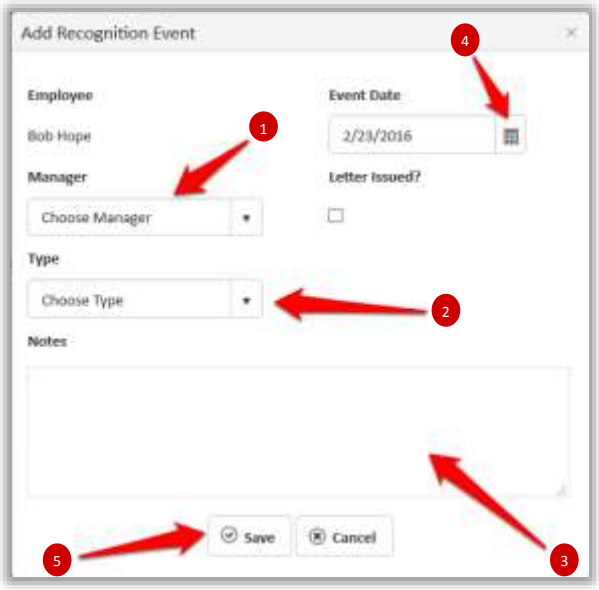


Figure 151

1. Select the appropriate manager.
2. Select the award type.
3. Type appropriate notes and details.
4. Select the event date.
5. Click *Save* when complete.

Employee Attendance Incidents

Record and track attendance incidents on the **Attendance Incidents** Page.

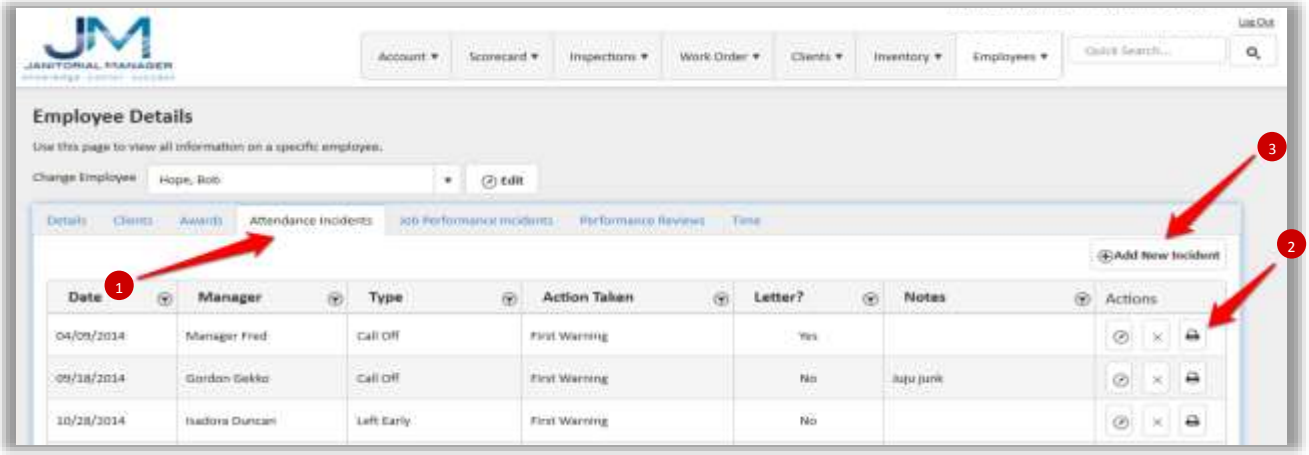


Figure 152

1. Select *Attendance Incidents* from the ***Employee Details*** menu bar.
2. Use the *Edit* button to edit the record, the *Delete* button to delete a record, and the *Print* button to create a printable form for the selected record.
3. Select *Add New Incident* to create a new employee Attendance Incident record.

Add Attendance Incident

Figure 153

1. Select the appropriate *Manager*.
2. Select the *Incident Type*.
3. Type appropriate notes and details.
4. Select the *Incident Date*.
5. Slect the action taken.
6. Click *Save* when complete.

Employee Job Performance Incidents

Record and track Job Performance incidents on the **Job Performance Incidents** Page.

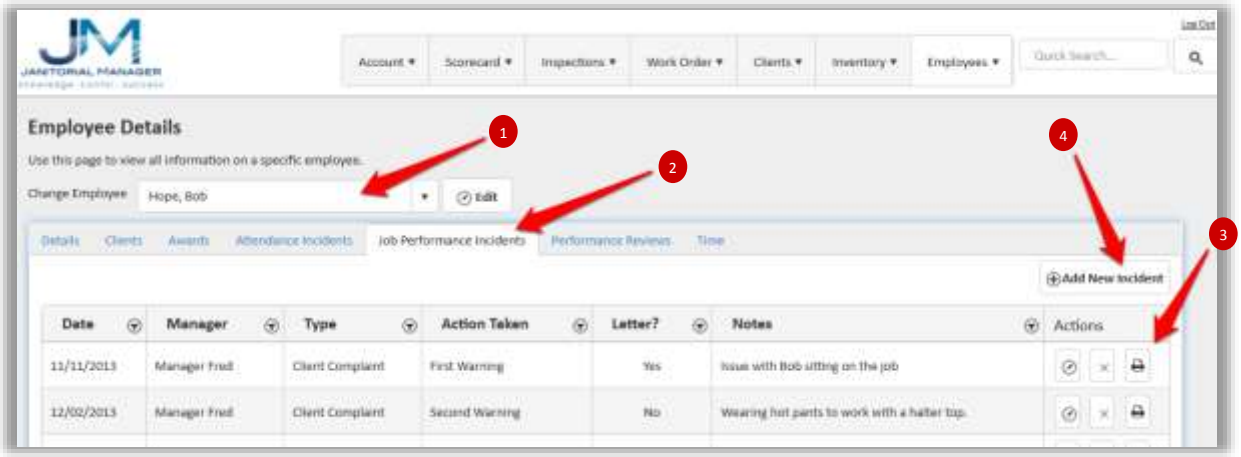


Figure 154

1. Select the desired employee.
2. Select *Job Performance Incidents* from the ***Employee Details*** menu bar.
3. Use the *Edit* button to edit the record, the *Delete* button to delete a record, and the *Print* button to create a printable form for the selected record.
4. Select *Add New Incident* to create a new *Job Performance Incident* record.

Add Job Performance Incident

1. Select the appropriate *Manager*.
2. Select the *Incident Type*.
3. Type appropriate notes and details.
4. Select the *Incident Date*.
5. Select *Action Taken.*
6. Click *Save* when complete.

Figure 155

Employee Performance Reviews

Record and track performancer reviews on the **Performance Review** Page.

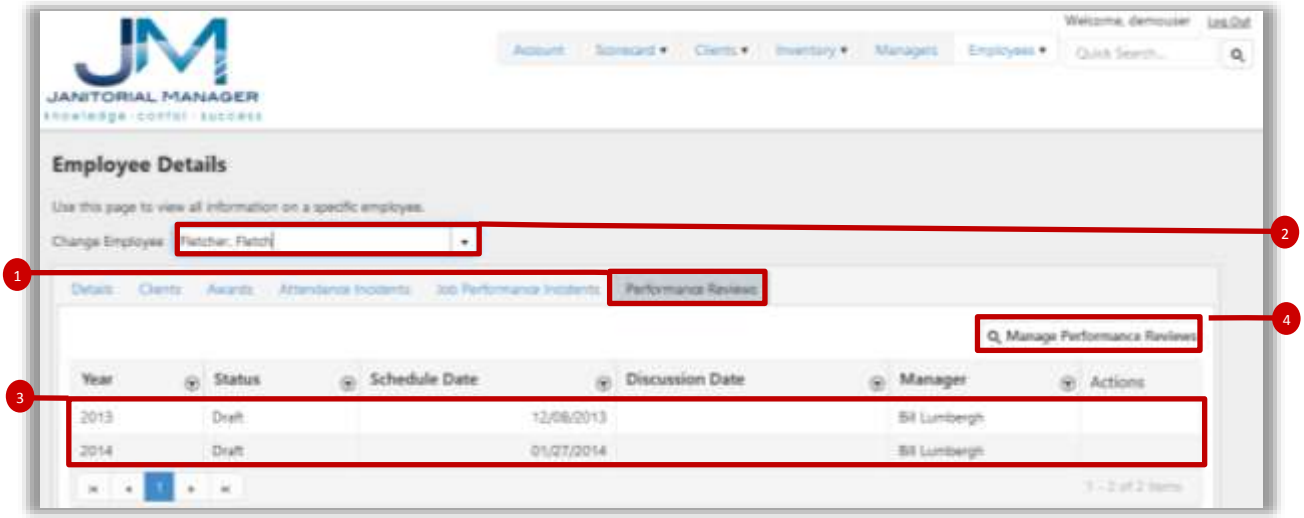


Figure 156

1. Select *Performance Reviews*.
2. Select the desired employee.
3. View *Performance Review* history for the selected employee.
4. Select the *Manage Performance Review* button.

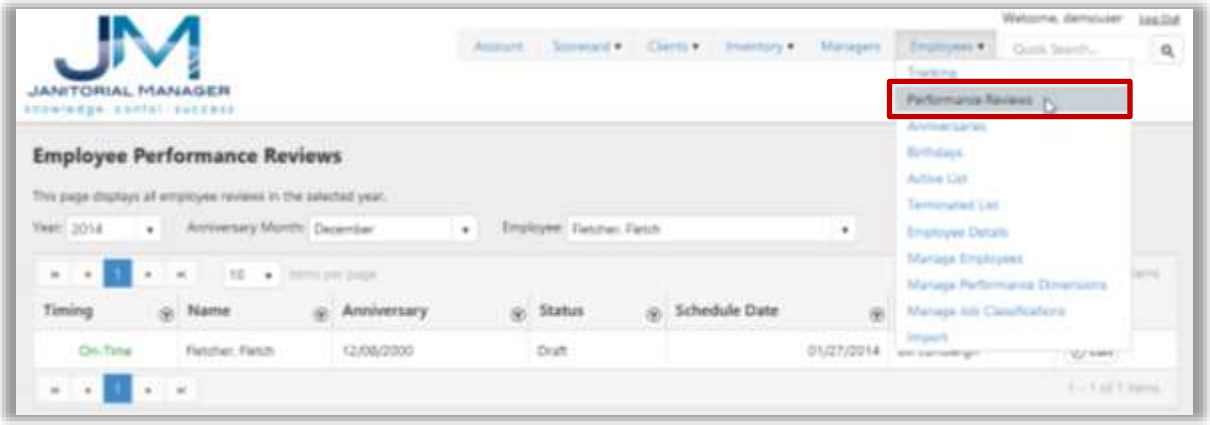


Figure 157

Note: *Performance Reviews* can also be reached by selecting *Performance Reviews* from the **Employees** tab from the main menu as seen above in Figure 157.

Completing a Performance Review

Record and track performancer reviews on the **Performance Review** Page

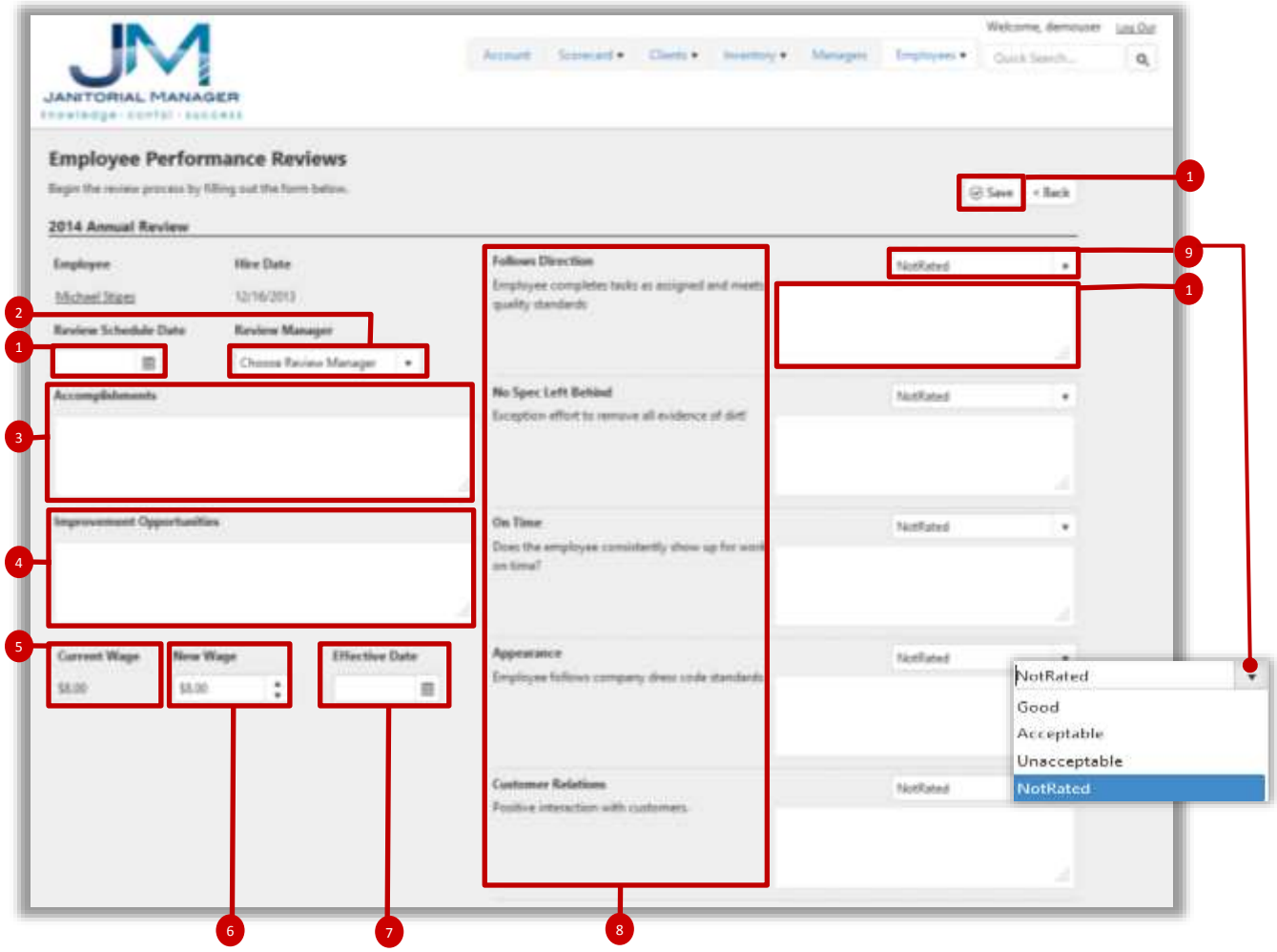


Figure 158

1. Select the date on which the review is conducted.
2. Select the appropriate manager conducting the review.
3. Fill out applicable accomplishments.
4. Fill out applicable *Improvement Opportunities*.
5. Shows the current employee wage.
6. If appropriate, a new wage can be entered.
7. Select the effective date for the new employee wage.
8. Performance Dimensions can be customized by selecting *Manage Performance Dimensions* under the **Employees** tab on the main menu bar. *See the following figures.*
9. The employee can be rated for each Performance category by selecting *Good, Acceptable* or *Unaccepted.*
10. Add notes as applicable.

Performance Reviews - At a Glance

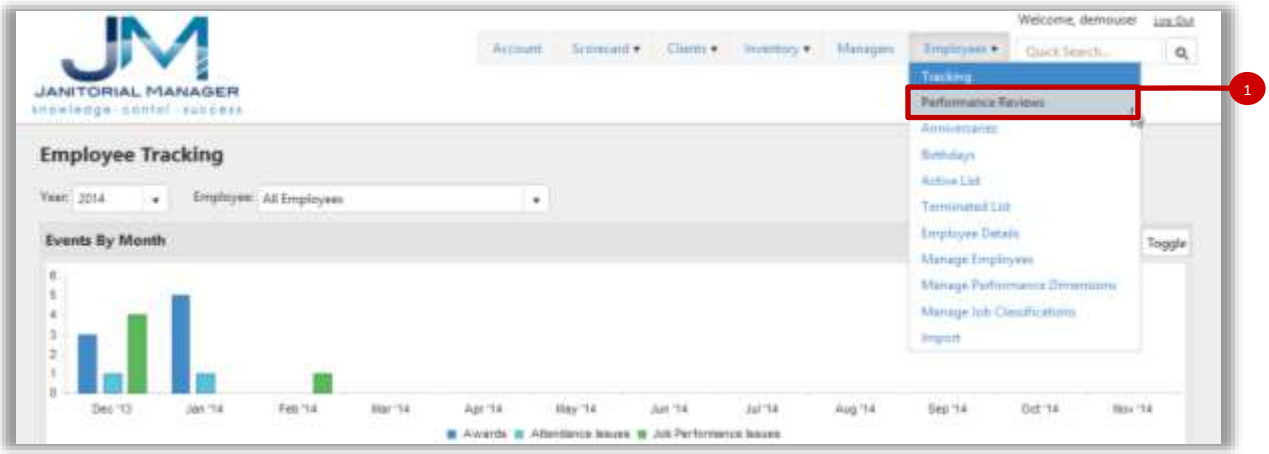


Figure 159

1. To review upcoming performance reviews by month select *Performance Reviews* from the **Employees** tab on the main menu. See the image below.

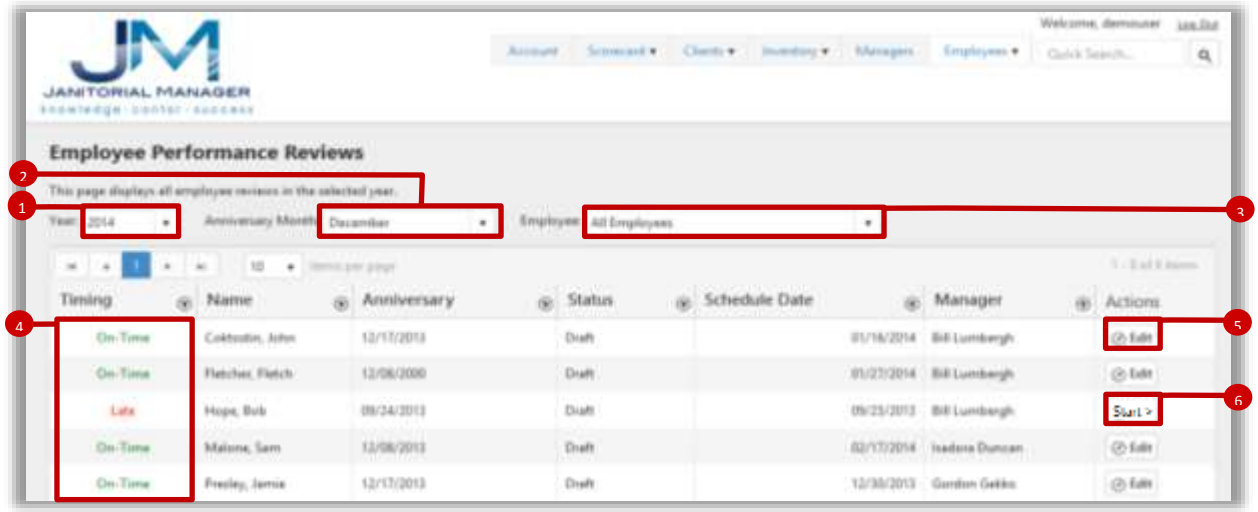


Figure 160

1. Select the desired year.
2. Select the desired month.
3. Select an employee or all employees.
4. The *Timing* column displays whether an employee review is *Late* or *On-Time.*
5. In the *Actions* column, select *Edit* to review or change a completed Review.
6. In the *Actions* column, select *Start* to begin a Review. See **Completing a Performance Review** above.

Employee Anniversaries

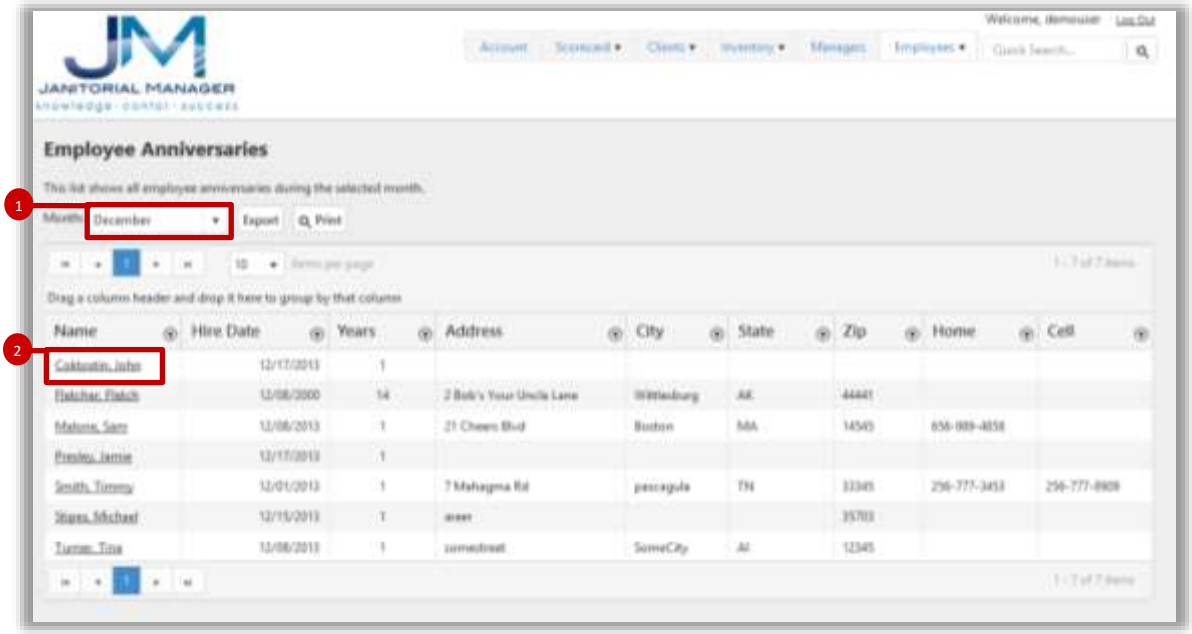


Figure 161

1. Select the desired month.
2. To see an employee record, click the desired employees name.

Employee Birthdays

Figure 162

1. Select the desired month.
2. To see an employee record, click the desired employees name.

Active Employee List

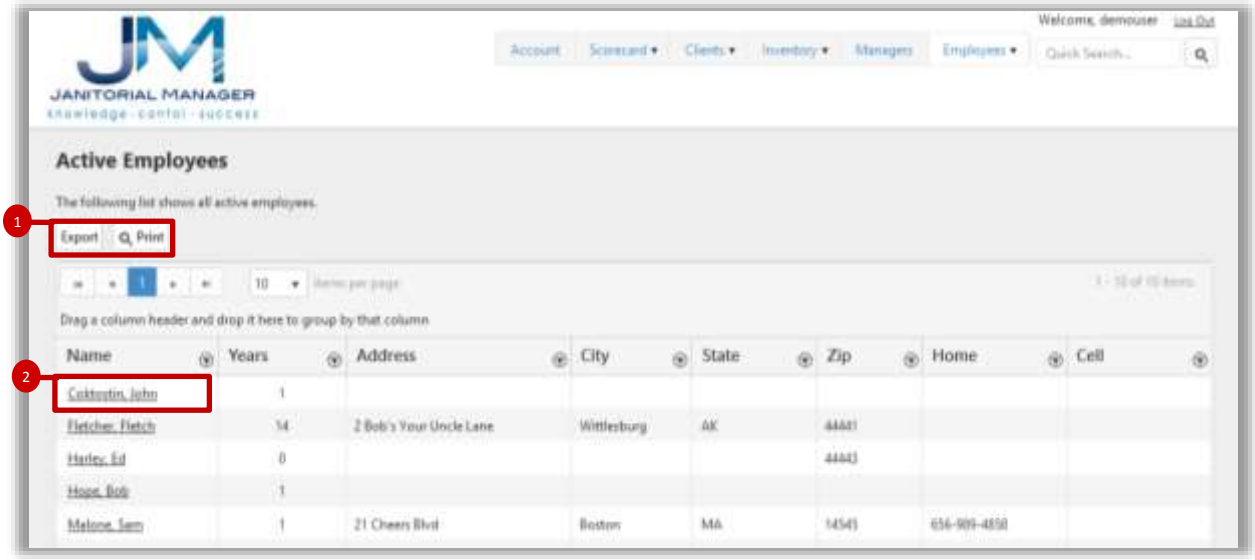


Figure 163

1. Use the *Export* button to export the *Active Employees* to an Excel spreadsheet and the *Print* button to generate a printable page.
2. To see an employee record, click the desired employees name.

Terminated Employee List

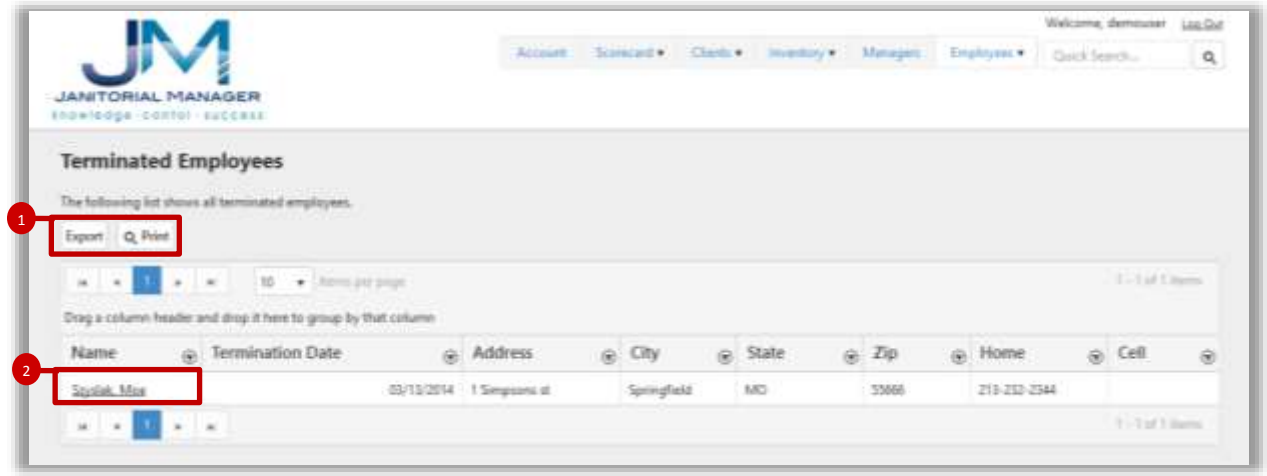


Figure 164

1. Use the *Export* button to export the *Terminated Employees* list to an Excel spreadsheet and the *Print* button to generate a printable page.
2. To see an employee record, click the desired employees name.

Employee Details

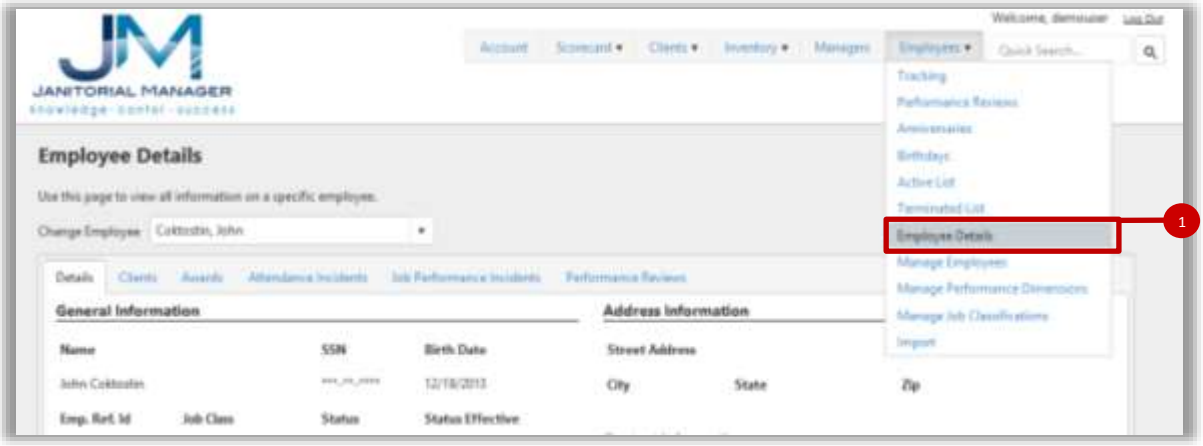


Figure 165

1. To navigate to the *Employee Details* page, select *Employee Details* from the **Employees** tab on the main menu bar.
2. See **Employee Details** above.

Identify Client Account Employee Training

In many cases an employee over time will be trained for multiple clients. JM can be used to track all the clients each employee is trained for. JM can then easily and quickly provide management a list of substitute employees when necessary.

Select the **Employees** tab and **Employee Details** on the JM application as shown in Figure 165.

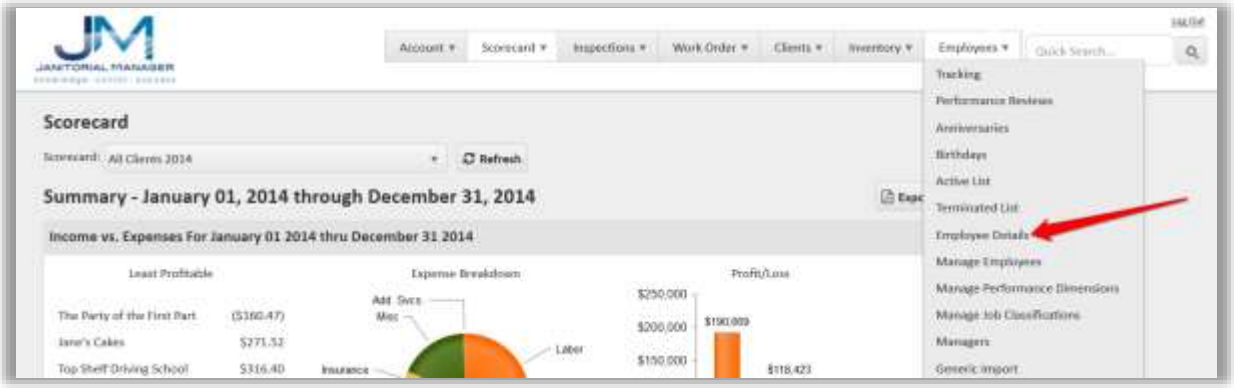


Figure 166

Select the desired employee from the Change Employee dropdown list as shown below in Figure 166.

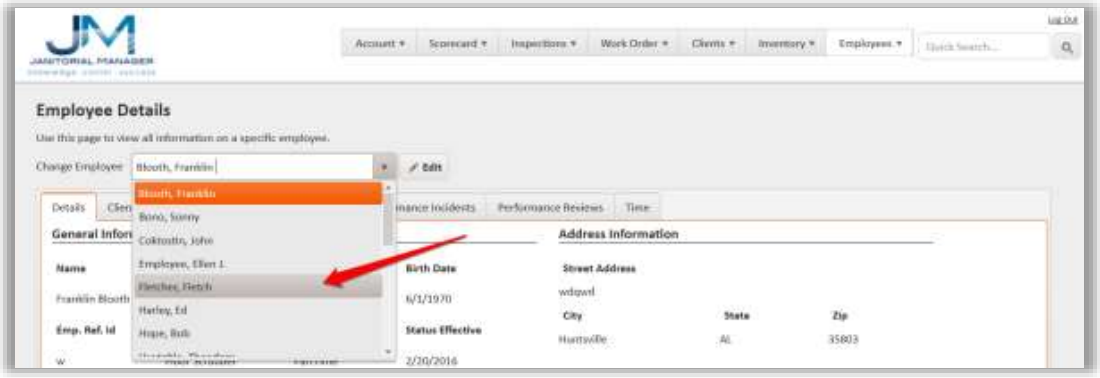


Figure 167

After locating the employee, select the **Clients** tab as shown below in Figure 167.

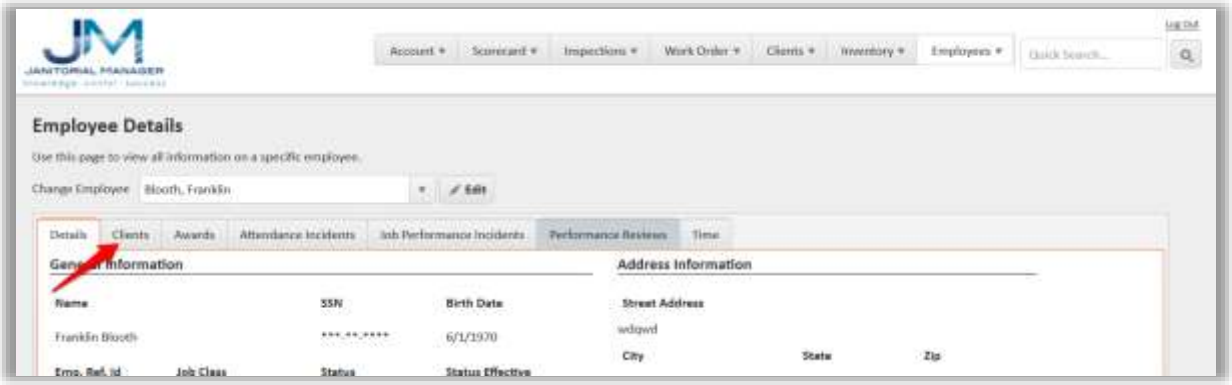


Figure 168

A list of available clients will be displayed. Locate each client that the selected employee is trained for and then select the **Add** button.

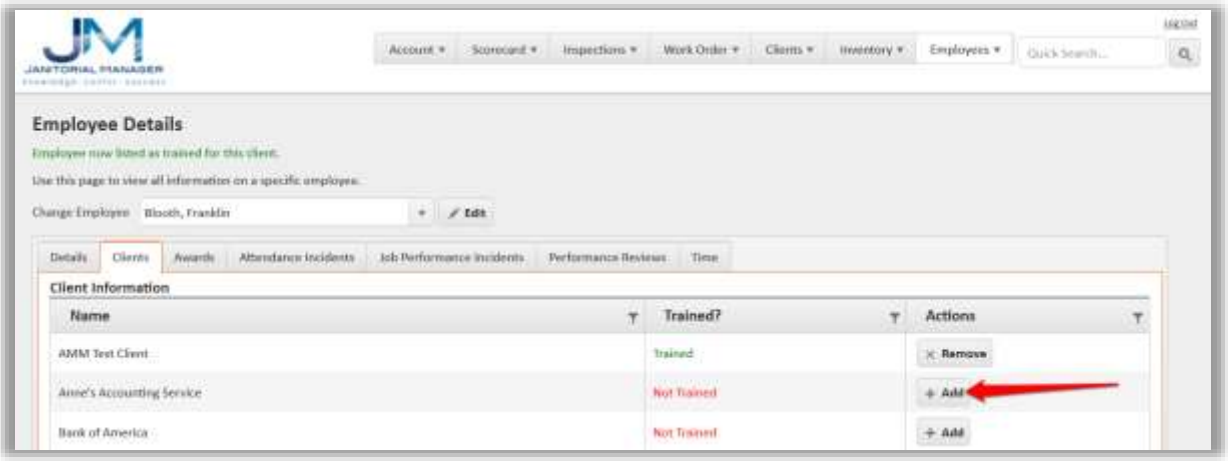


Figure 169

View Client Account Employee Training

JM can easily provide the list of clients that each employee has been trained to service.

Select the **Employees** tab and **Employee Details** on the JM application as shown in Figure 169.

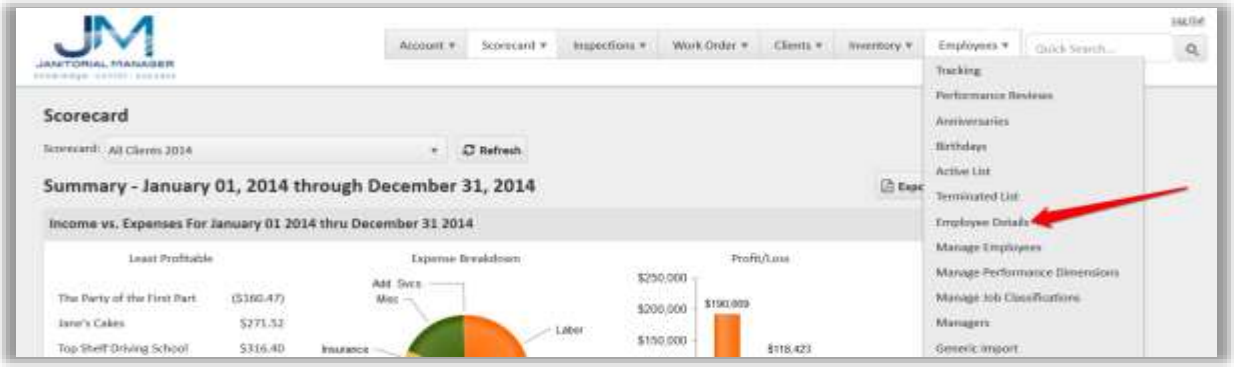


Figure 170

Select the desired employee from the Change Employee dropdown list as shown below in Figure 170.

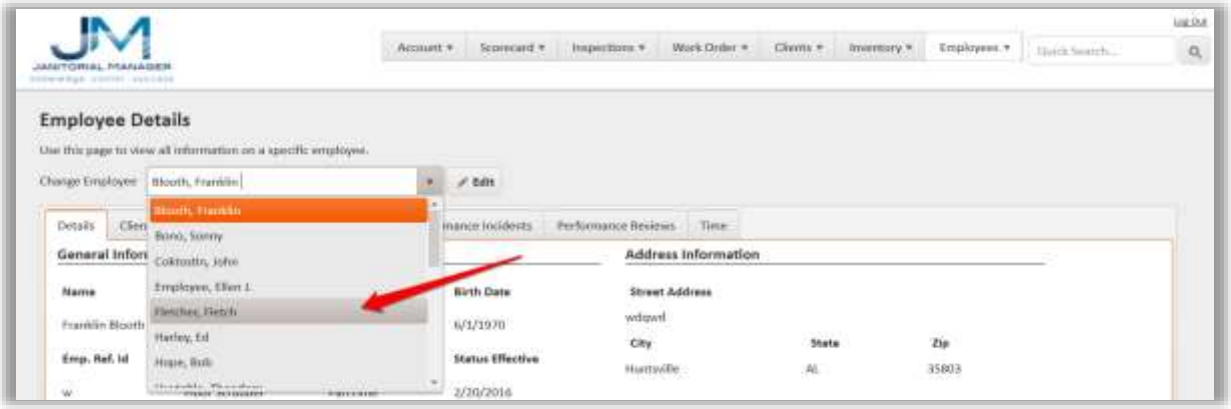


Figure 171

After locating the employee, select the **Clients** tab as shown below in Figure 171.

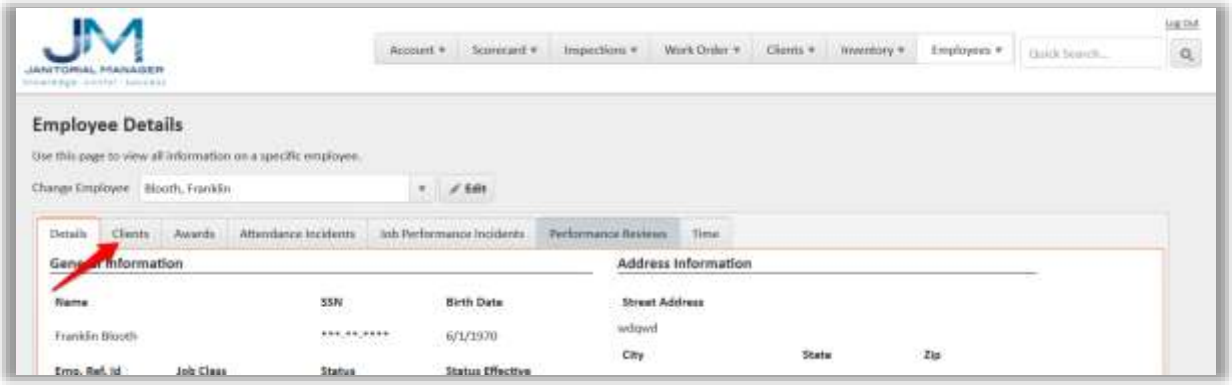


Figure 172

A list of available clients will be displayed.

In order to easily determine to entire list of clients that the selected employee is trained for, select the filter option on the Trained For column as shown below in Figure 172.

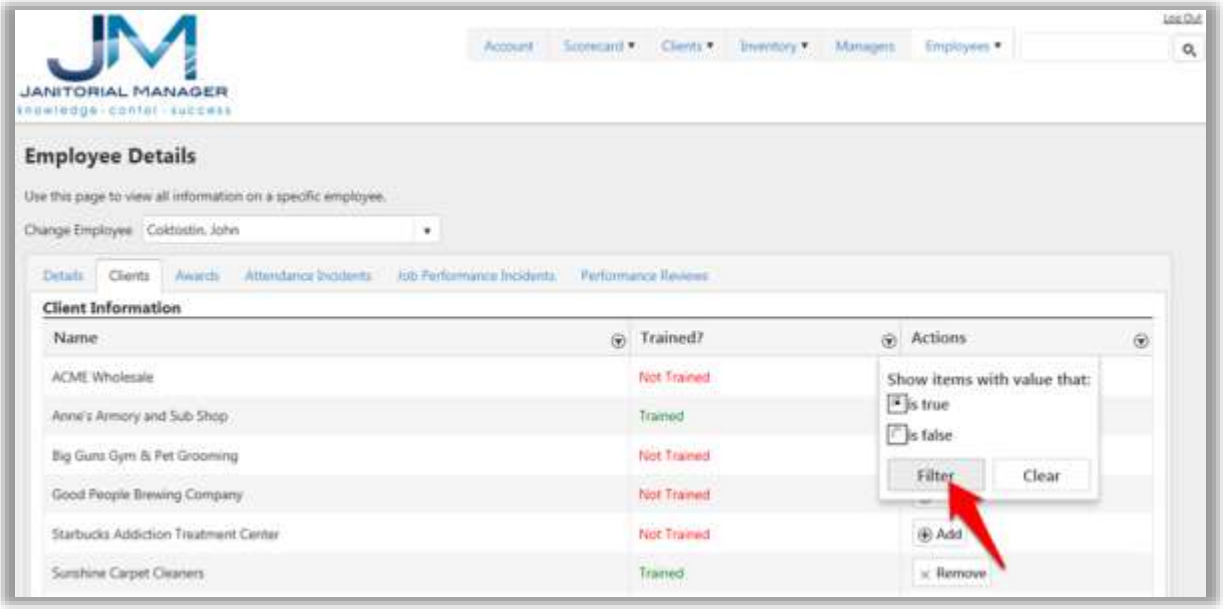


Figure 173

View Active Employees

This will generate a complete list of active employees managed by JM. The generated list can be printed or exported to an Excel spreadsheet.

Select the **Employees** tab and **Active List** on the JM application as shown in Figure 173.

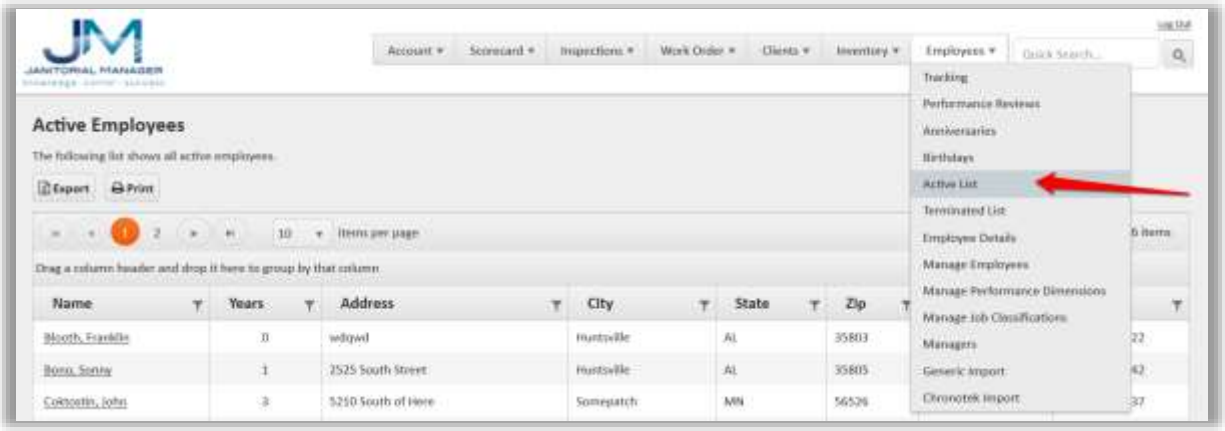


Figure 174

The current list of all active employees managed by JM will be displayed as shown in Figure 174 below.

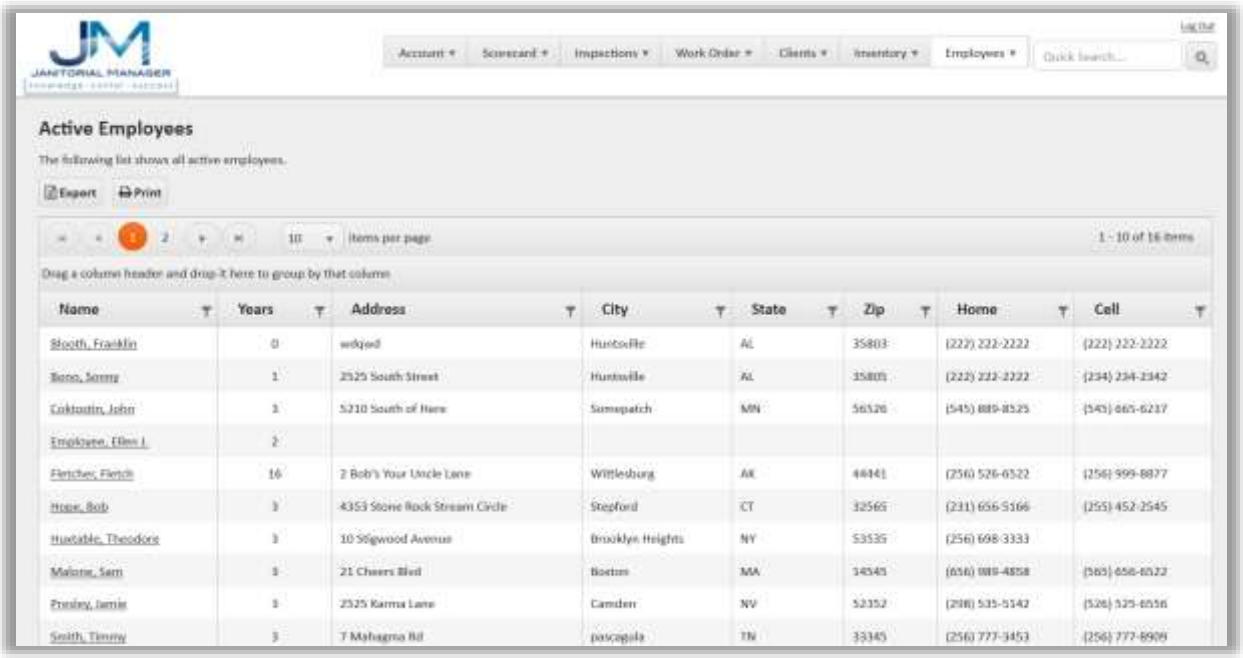


Figure 175

Manage Supplies

Add Supply Vendors

JM manages supply items used by your company. You must provide the supplier for each inventory supply item.

Select the **Inventory** tab and **Manage Supplies** from the dropdown list.

Figure 176

The current list of suppliers will be displayed.

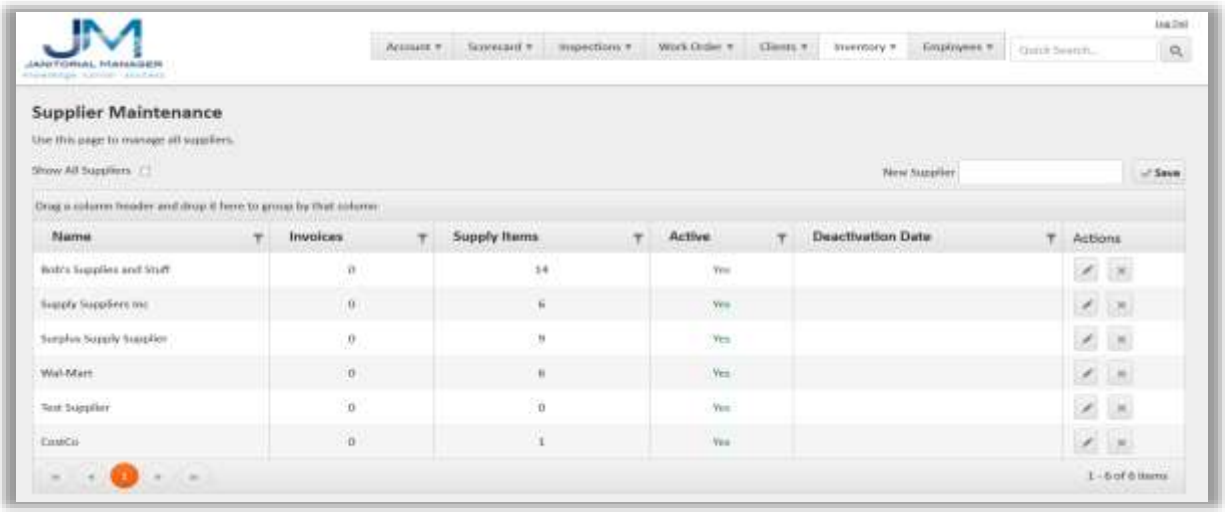


Figure 177

Add the name of the supplier in the Add New Supplier field as shown above in Figure 176. Then click the **Save** button.

Editing a Supplier

If a supplier name for any inventory item(s) change, the information can be updated as necessary.

Select the **Inventory** tab and the **Manage Suppliers** tab from the dropdown list.

Figure 178

The current list of suppliers will be displayed.

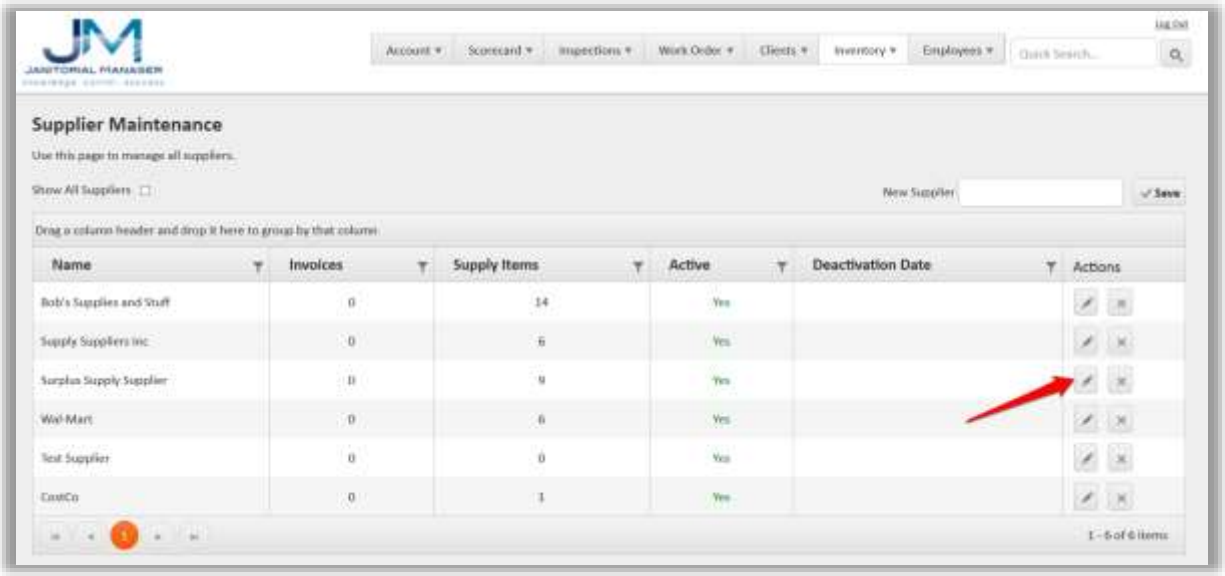


Figure 179

Locate to row in the table containing the supplier that needs to be edited and then select the **Edit Supplier** button as shown above.

Figure 180

Edit the supplier name as required and the click the **Save** button

Deleting a Supplier

If for some reason your company no longer uses a particular supplier, then this supplier can be deleted. The supplier will still be in the JM system but it will no longer be active.

Select the **Inventory** tab and the **Manage Suppliers** tab from the dropdown list.

Figure 181

Select the **Manage Suppliers** tab from the dropdown list.

The current list of suppliers will be displayed.

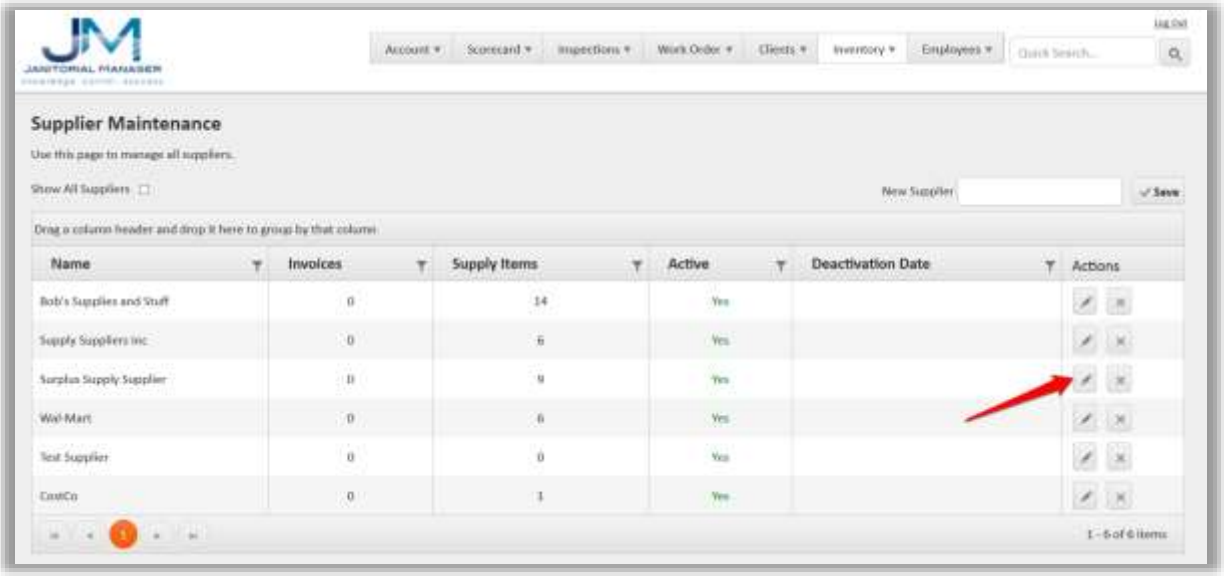


Figure 182

Locate to row in the table containing the supplier that needs to be deleted and then select the **Delete Supplier** button as shown above.

Note: After a supplier is deleted you must click the **Show All Suppliers** checkbox to view any deleted suppliers. The Active status of NO and the deactivation date will be shown for each deleted supplier.

Adding a Supply Inventory Item

Each supply item used by your company to service your clients must be added to JM. Once the supply item is added to JM, each supply item usage can be recorded.

Select the **Inventory** tab and **Manage Supply Items** from the dropdown list.

Figure 183

The current list of Supply Items will be displayed.

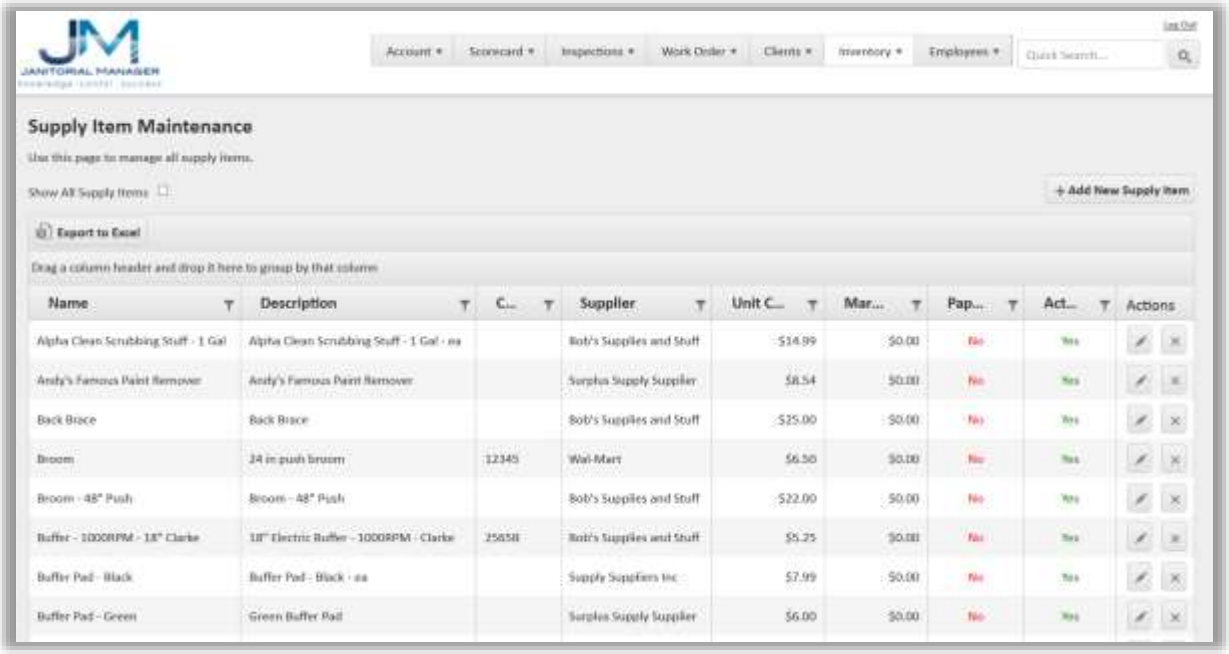


Figure 184

Select the Add New Supply Item as shown in Figure 183 above.

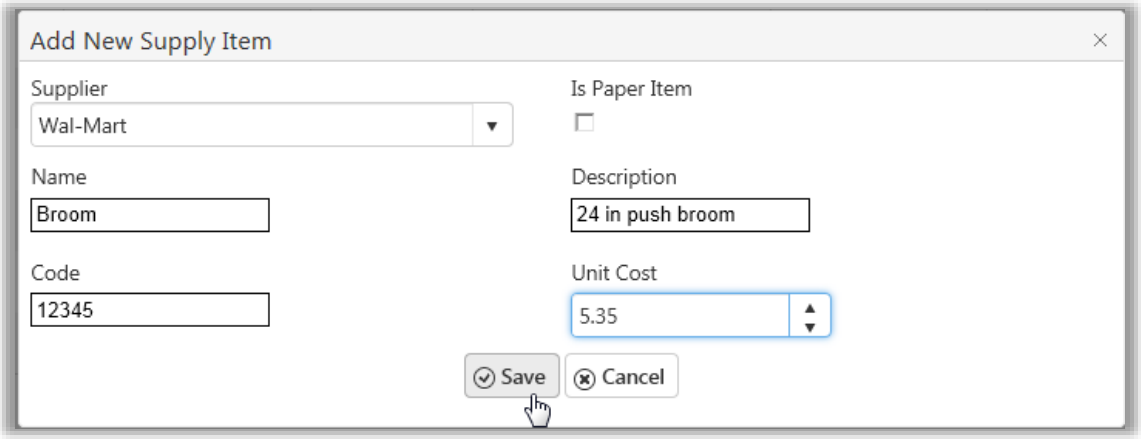


Figure 185

Note: if the supplier is not present in the Supplier dropdown list, go to Add Supplier Details…

After adding the required information as shown above, select the **Save** button.

Editing a Supply Inventory Item

The supply item information will typically need to be updated over time. For example, the price may increase or decrease based on negotiated prices with suppliers. Any of the supply item details can be edited.

Select the **Inventory** tab and **Manage Supply Items** tab from the dropdown list.

Figure 186

The current list of Supply Items will be displayed.

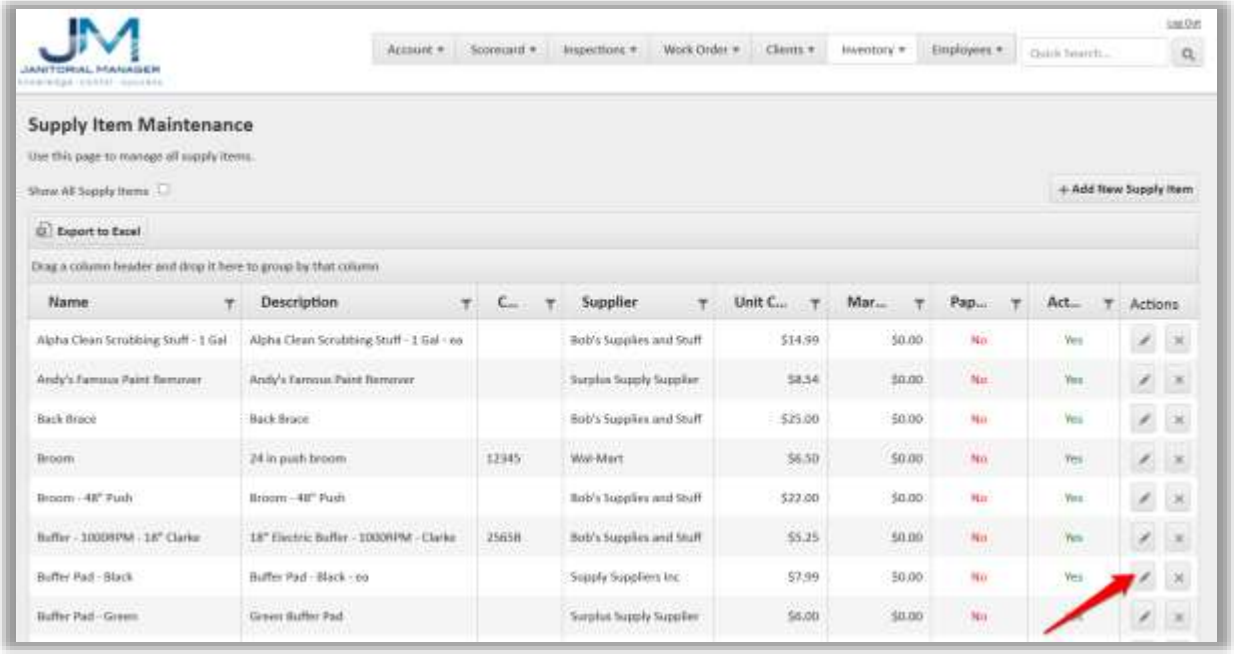


Figure 187

Locate the row in the table containing the supply item that need to be edited. Then select the **Edit Supply Item** button as shown above in Figure 186.

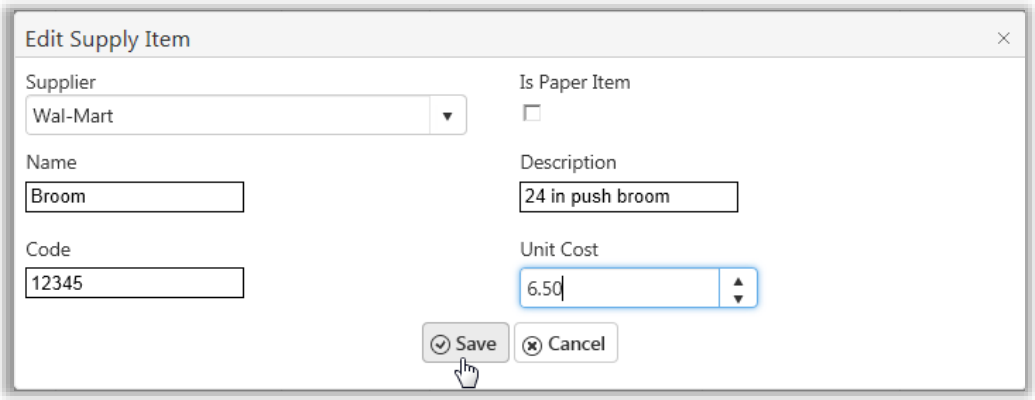


Figure 188

After making the necessary edits to the supply item, select the **Save** button.

Note: if the price of the item is changed, all recorded supply usage transactions will use the price of the supply item at the time of the transaction. All future transactions will use the modified price.

Deleting a Supply Inventory Item

If a supply item is no longer used by your company for some reason, it can be deleted in the JM application. Deleting the supply item does not completely delete it from JM, instead is inactivates the item such that it is no longer listed in dropdown boxes when recording inventory supply item usages.

Select the **Inventory** tab and **Manage Supply Items** tab from the dropdown list.

Figure 189

The current list of Supply Items will be displayed.

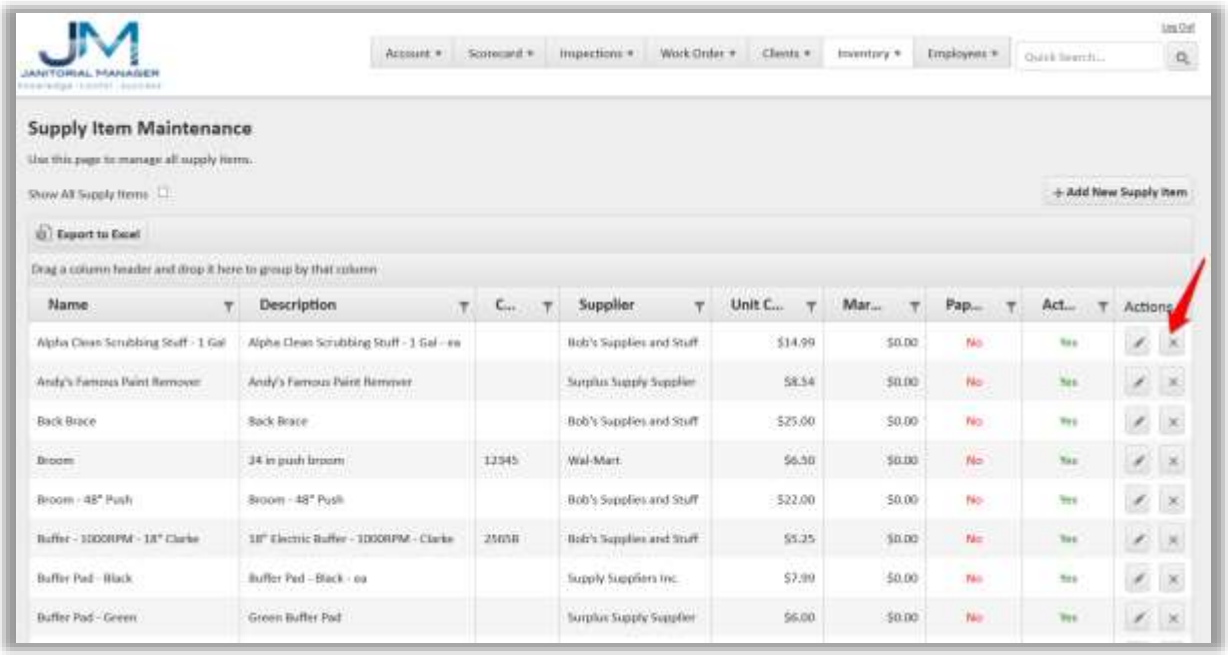


Figure 190

Locate the row in the table containing the supply item that need to be deleted. Then select the **Delete Supply Item** button as shown above in Figure 189.

Note: When a supply item is deleted, all recorded supply usage transactions will be maintained for reporting purposes. Deleting a supply item will remove it from the Supply Item dropdown list on the Add Supply Usage screen.

Add New Supply Usage

JM will track supply usage for each of your clients. The supply usage function is primarily for tracking supplies that are utilized in the completion of the service provided. Supplies that are distributed to client locations will need to be recorded in JM. They can be recorded on paper and then entered in to JM via the Supply Usage section or keyed directly into JM.

Select the **Inventory** tab and select the **Manage Supply Usage** tab from the dropdown list.

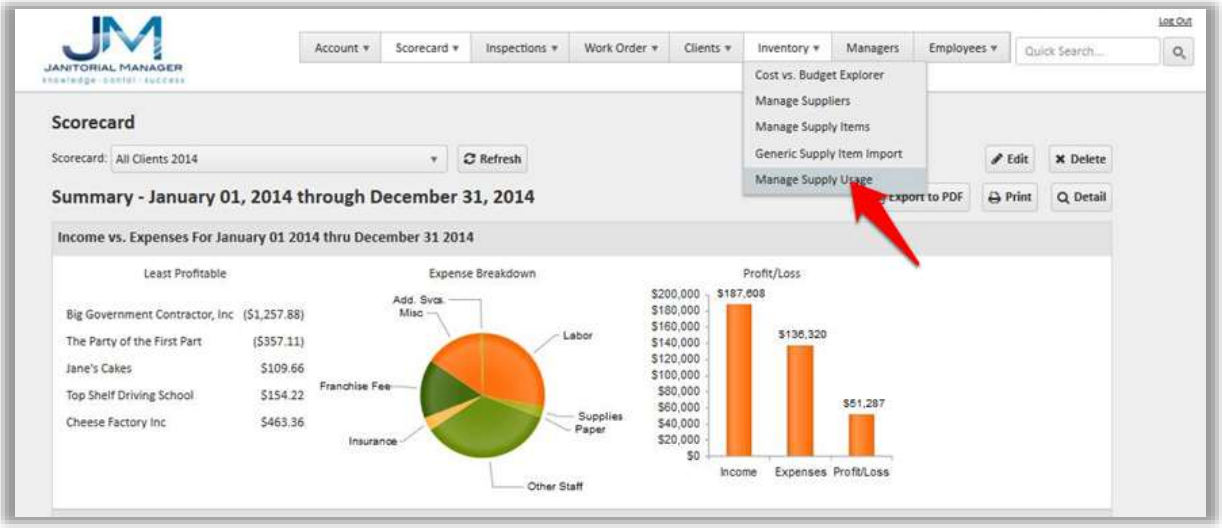


Figure 191

A current list of supply usage transactions will be displayed

Note: Supply Usages entered before 6/1/15 will appear in this view but can be viewed on the **Cost vs. Budget page

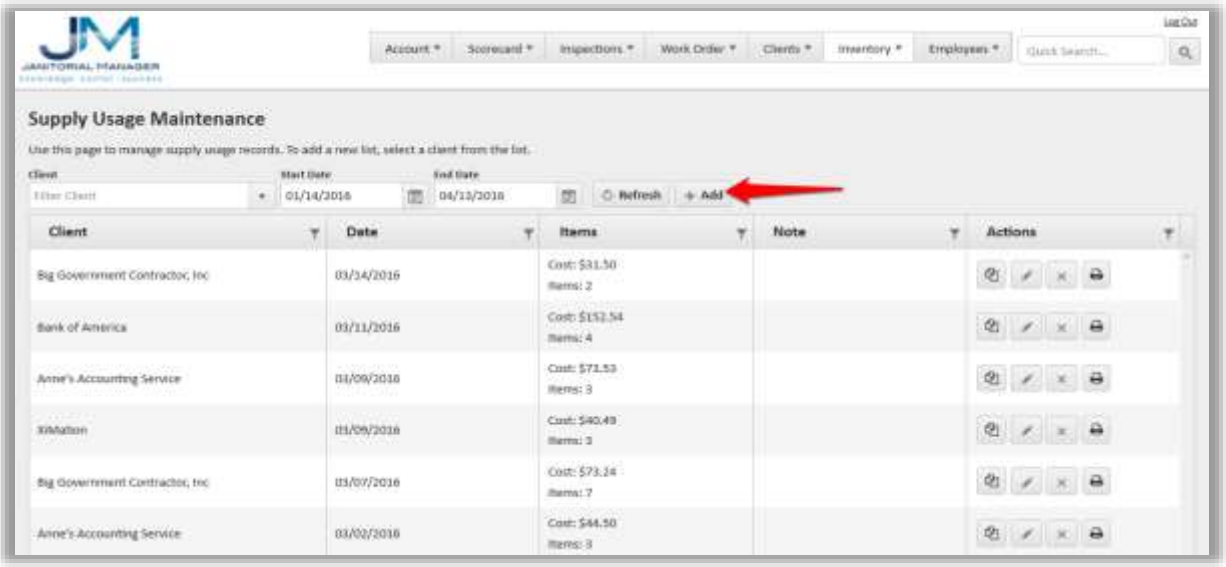


Figure 192

Select the **+Add** button as shown above in Figure 191.

Return to Table Of Contents

From the **client** dropdown list, select the desired client as shown in Figure 192.

Figure 193

Selecting a Client will auto fill the client information. This information can be edited to accommodate for alternate locations. See Figure 193.

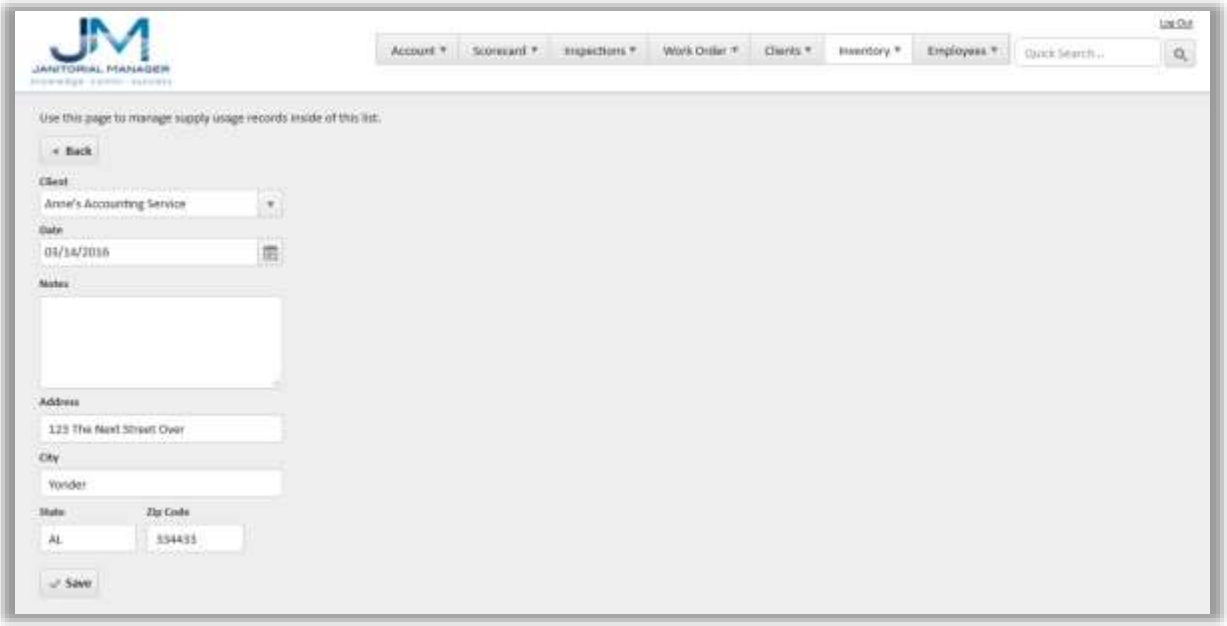


Figure 194

Record detailed notes in the notes section. When all the information is correct, click the **Save** button.

After clicking **Save**, the Supplies view appears. Select supplies from the drop down menu, adjust the quantity and select **Add**. See Figure 194.

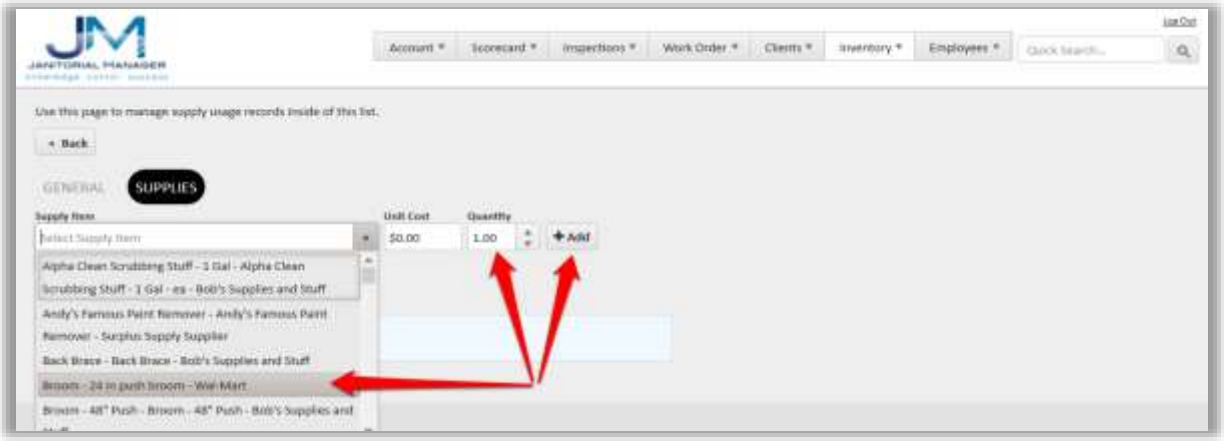


Figure 195

Continue to use the drop down menu to select each supply charged to the Client.

If it is necessary to update a quantity, select the same item again from the drop down menu, change the quantity and click **Update**. See figure 195.

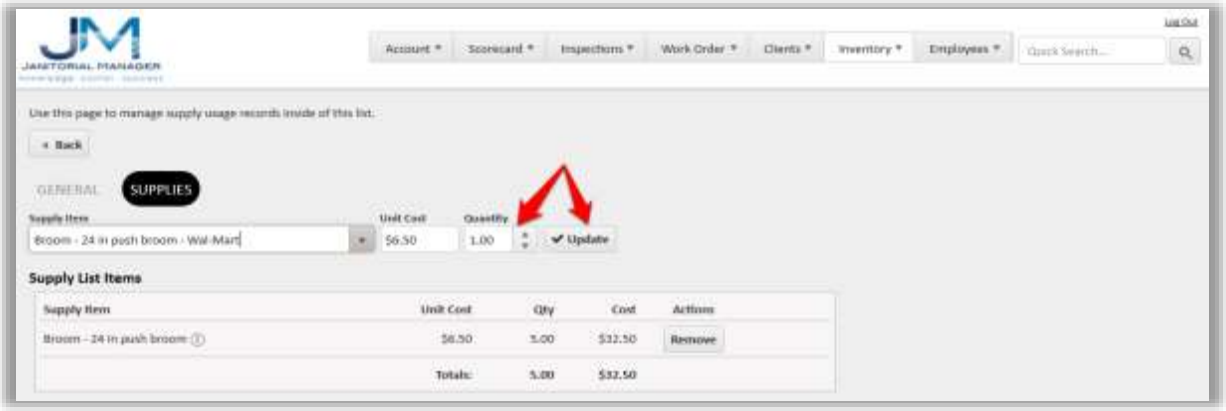


Figure 196

To remove an item, click the **Remove** button.

Click the **Back** button to return to the Supply Usage Maintenance page. This Supply Usage is now a part of the Client's permanent record. Note the completed Supply Usage entry in Figure 196.

Figure 197

Copying a Supply Usage Record

If you would like to re-use a previously recorded Supply Usage, the particular transaction can be located, copied, edited and saved as a new record.

Select the **Inventory** tab and select the **Manage Supply Usage** tab from the dropdown list.

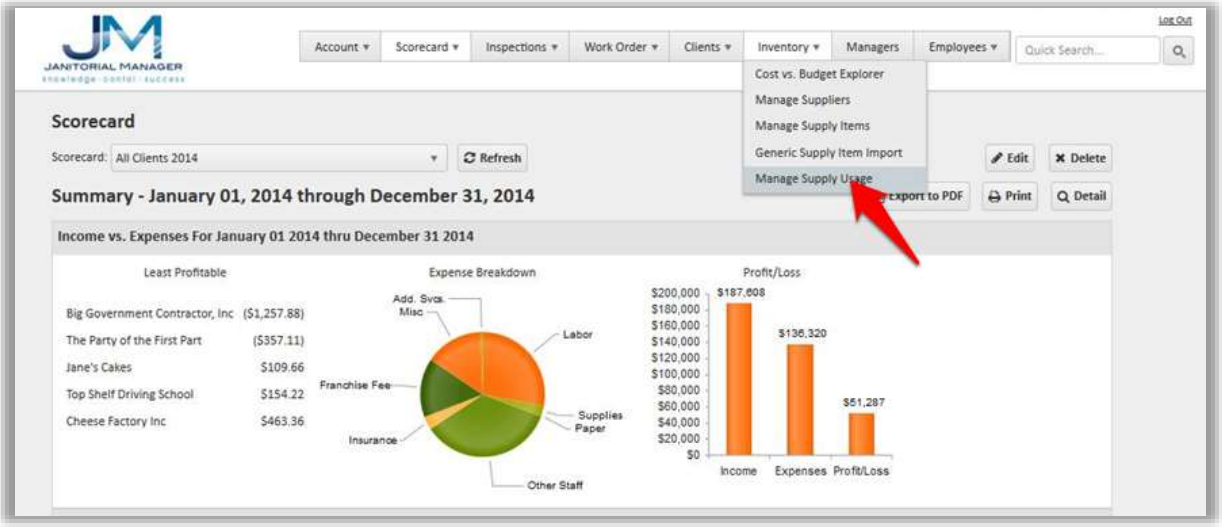


Figure 198

To copy a Supply Usage record, locate the desired record and click the **Copy** icon. See figure 198 below.

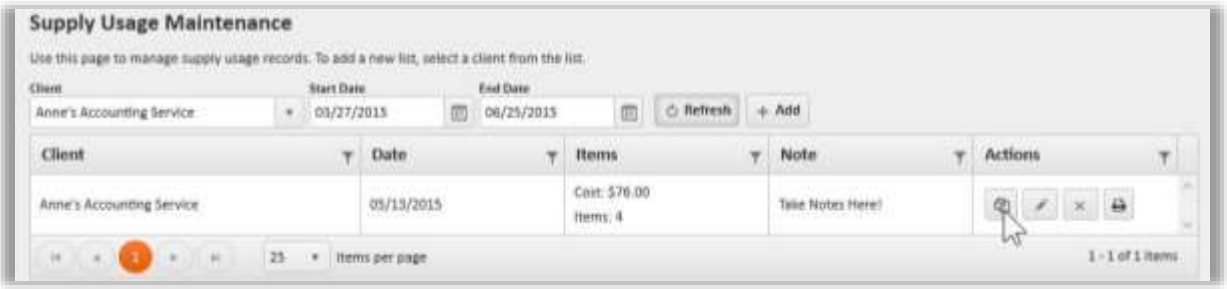


Figure 199

Select a date for the newly copied Supply Usage record. Figure 199.

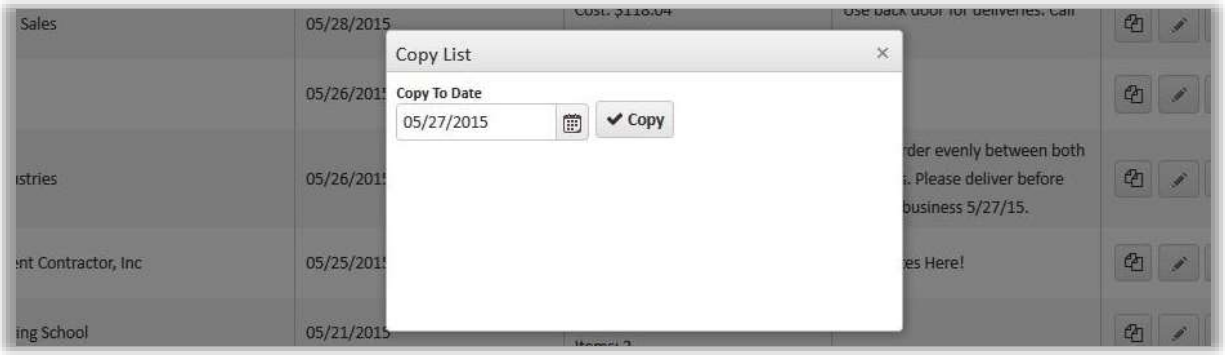


Figure 200

The copied record will appear with data from the original record. This information can be edited before saving the new record. Edit the information as necessary and click Save. Figure 200.

Figure 201

Next, click the **Supplies** button to edit, add or remove the supplies and quantities for the newly copied Supply Usage record. Figure 201.

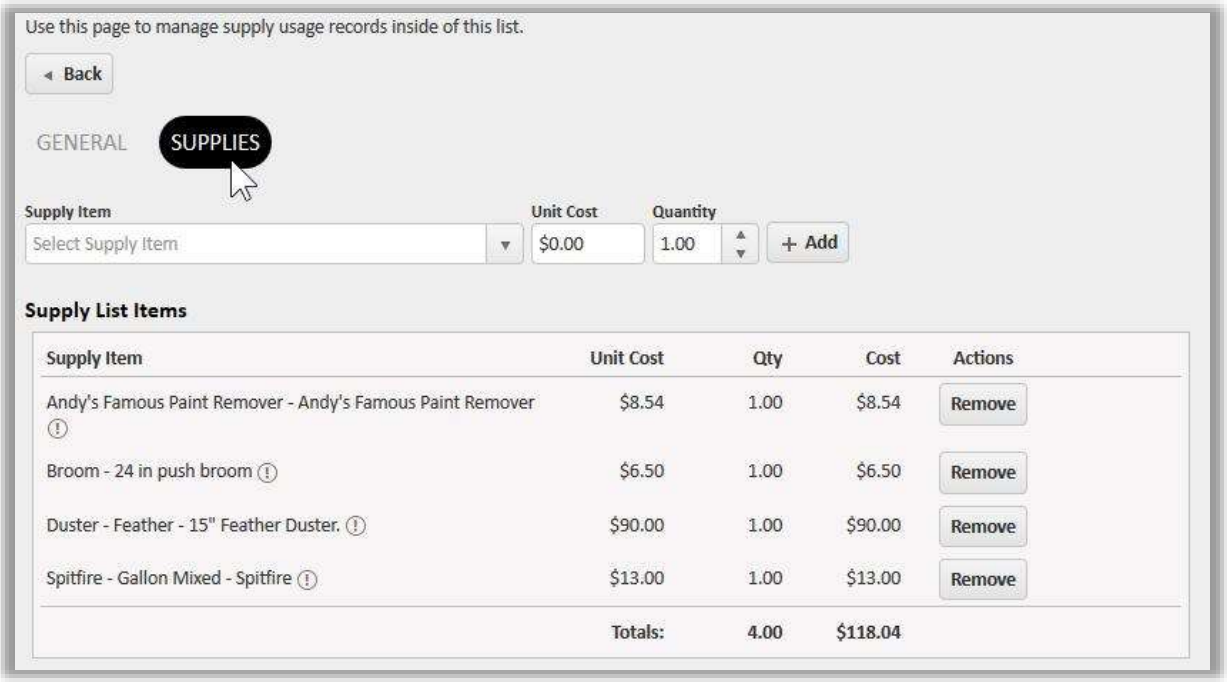


Figure 202

Editing a Supply Usage Record

If a previously recorded supply usage transaction contained an error of some sort, the particular transaction can be located and edited as required.

Select **Mange Supply Usage** from the **Inventory** tab. Figure 202.

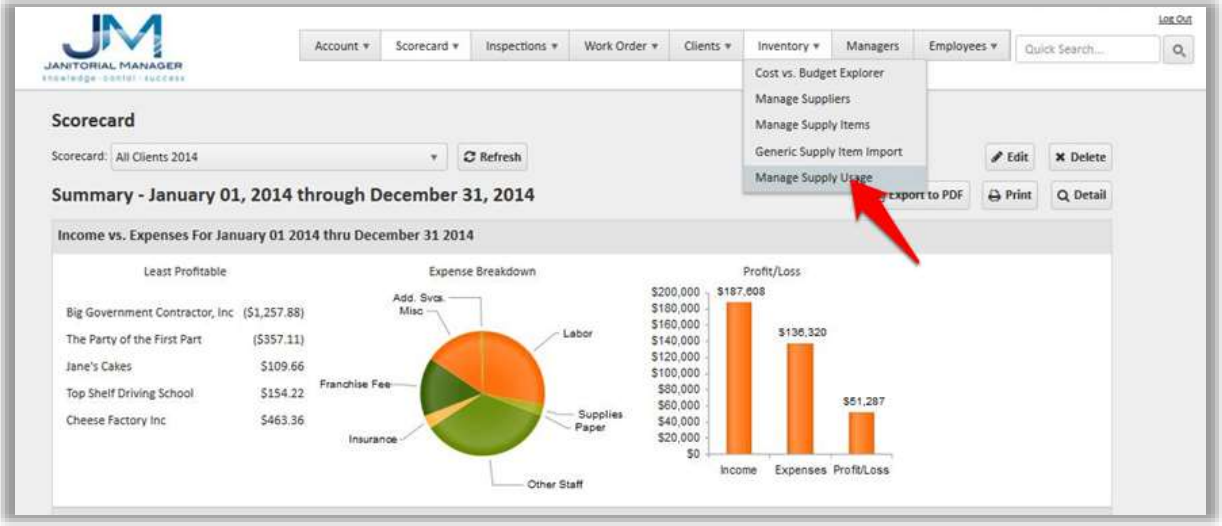


Figure 203

A current list of Supply Usage transactions will be displayed. Locate the row in the table containing the specific transaction that needs to be edited and then select the **Edit** button Figure 203.

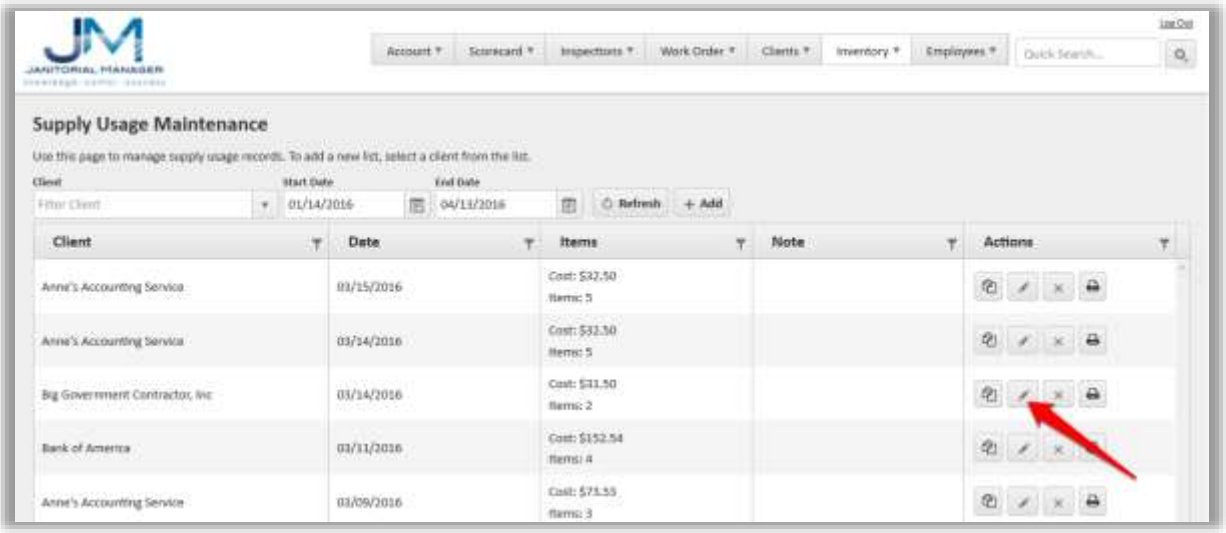


Figure 204

The Supply Usage record can be edited by adding, deleting supplies. Figure 200.

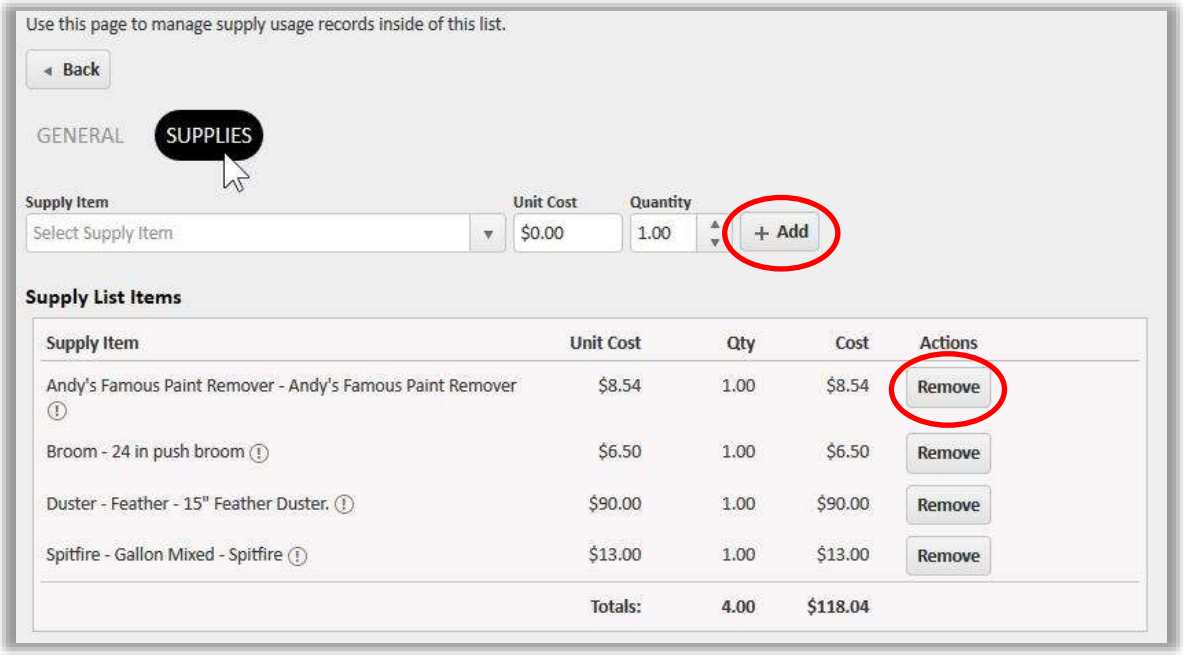


Figure 205

To update a quantity, select the Supply Item from the drop down, change the quantity to the desired quantity and click update. Figure 205.

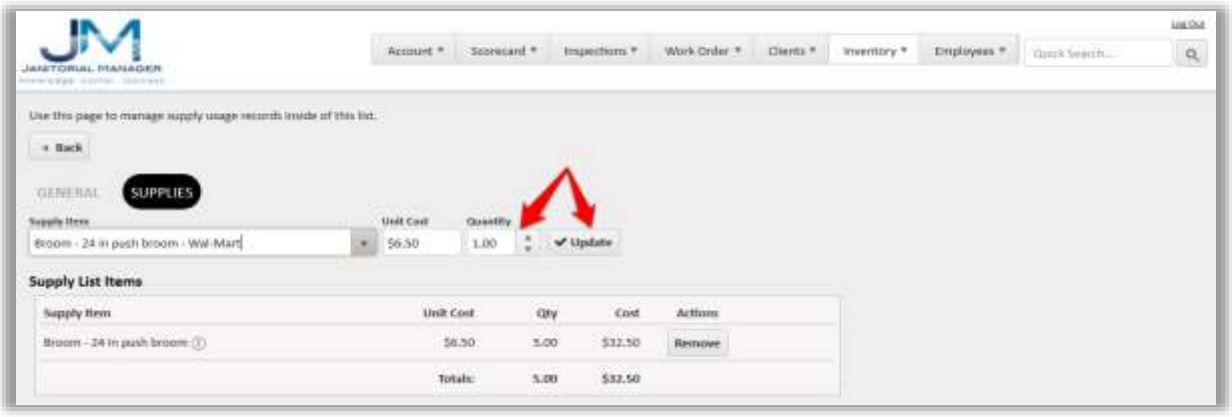


Figure 206

When all edits are complete, click the **Back** button to save changes.

Printing a Pick List

To print a 'pick list', after completing the Supply Usage entry, find the desired entry on the Supply Usage Maintenance page and click the printer icon on the far right. Figure 206.

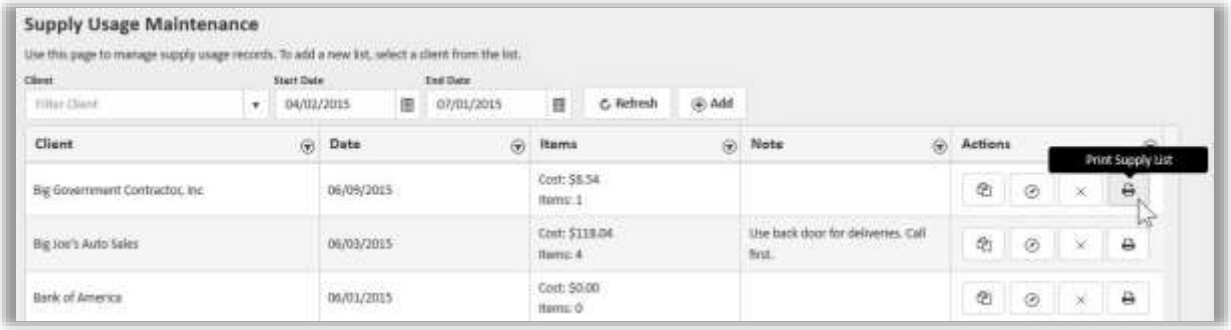


Figure 207

The Supply List will open in a new window and can then be printed. Figure 207.

JANITORIAL MANAGER
knowledge · control · success

Supply List

CLIENT	LOCATION	DATE
Big Government Contractor, Inc	15 Street Street Arab, AL 55665	06/09/2015

SUPPLIES

- ☐ Alpha Clean Scrubbing Stuff - 1 Gal - Alpha Clean Scrubbing Stuff - 1 Gal - ea (Bob's Supplies and Stuff) Qty: 1
- ☐ Andy's Famous Paint Remover - Andy's Famous Paint Remover (Surplus Supply Supplier) Qty: 1
- ☐ Back Brace - Back Brace (Bob's Supplies and Stuff) Qty: 1
- ☐ Broom - 24 in push broom (Wal-Mart) Qty: 1
- ☐ Broom - 48" Push - Broom - 48" Push (Bob's Supplies and Stuff) Qty: 1
- ☐ Buffer Pad - Black - Buffer Pad - Black - ea (Supply Suppliers Inc) Qty: 1
- ☐ Buffer Pad - Green - Green Buffer Pad (Surplus Supply Supplier) Qty: 1
- ☐ Buffer Pad - Red - Buffer Pad - Red (Surplus Supply Supplier) Qty: 1
- ☐ Duster - Feather - 15" Feather Duster. (Bob's Supplies and Stuff) Qty: 1
- ☐ Mop Bucket with Side Wringer 26 QT - Mop Bucket (CostCo) Qty: 1
- ☐ Mop Handle - 60" Wood Quick Release - Mop Handle (Supply Suppliers Inc) Qty: 1
- ☐ Rag Swap - 1 to 1 Clean Rag exchange (Bob's Supplies and Stuff) Qty: 1
- ☐ Spitfire - Gallon Mixed - Spitfire (Bob's Supplies and Stuff) Qty: 1

MANAGER SIGNATURE _____ CUSTOMER SIGNATURE _____

Figure 208

Delete a Supply Usage Record

If required a particular supply item usage transaction can be deleted.

Select the **Inventory** tab and **Manage Supply Usage.**

Figure 209

A current list of supply usage transactions will be displayed. Locate the row in the table containing the specific transaction that needs to be deleted and then select the **Delete** button as shown in Figure 209.

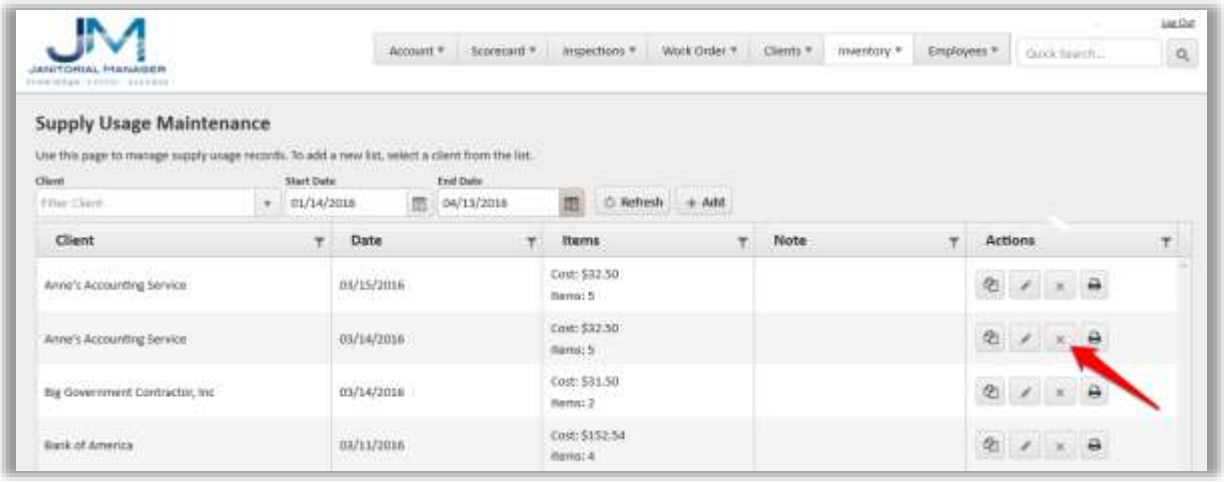


Figure 210

Upon successful deletion you will see the ***Supply usage successfully deleted*** message as shown below.

Figure 211

Sorting Supply Usage Records

JM allows you to sort and analyze your company's supply usage transactions in many ways.

Select the **Inventory** tab and **Manage Supply Usage.**

Figure 212

A current list of supply usage transactions will be displayed.

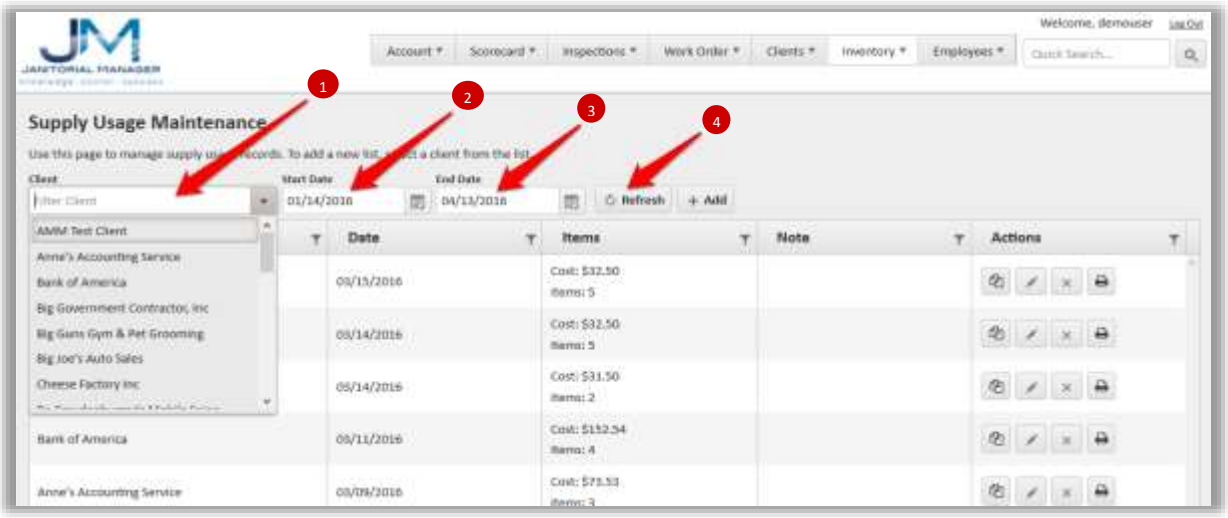


Figure 213

1. Filter by Client
2. Filter by Starting date
3. Filter by Ending date
4. The **Refresh** button will re-display the table based on your sorting options if required.

Inspections

Inspections in Janitorial Manager are template based. The system allows you to create as many templates as necessary, in any degree detail and assign them to clients.

Areas & Steps

To add or edit Areas and Steps, select **Manage Templates** from the **Inspections** tab. Figure 213.

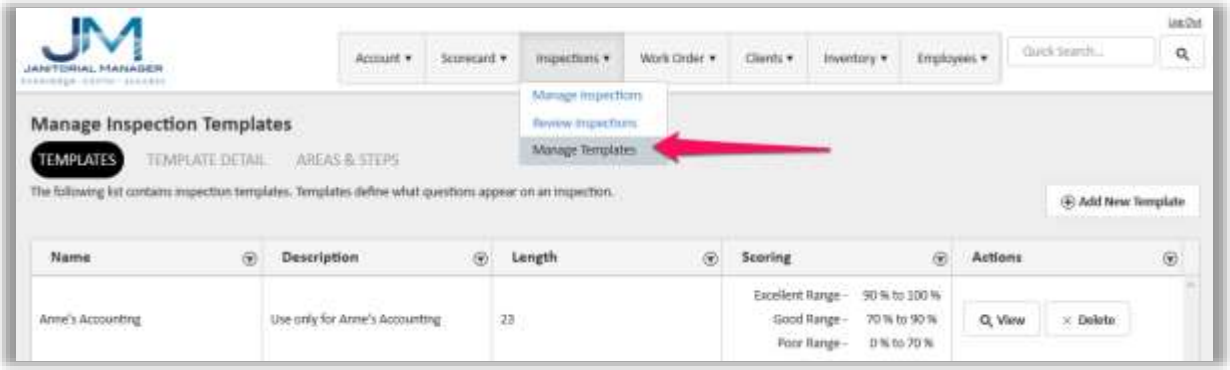


Figure 214

On the **Manage Inspection Templates** page select **Areas & Steps**. This page is your master list of Areas and Steps. You can create as many Areas as you need and as many Steps under each Area as needed.

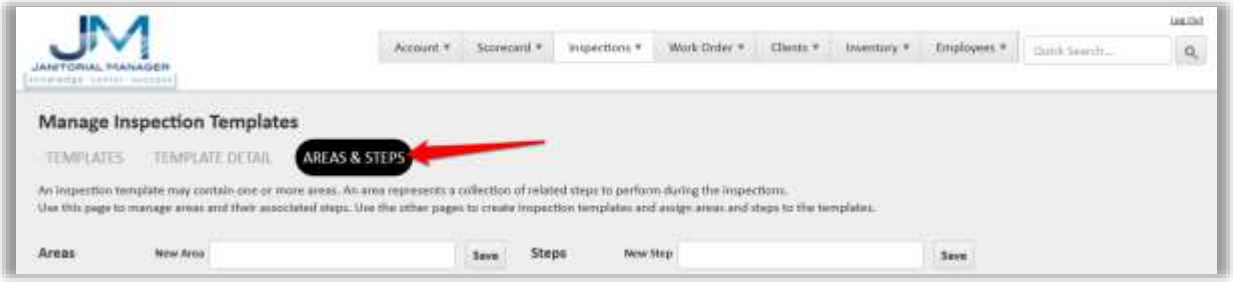


Figure 215

To create a new Area, type the name in the New Area field and click Save. Figure 215.

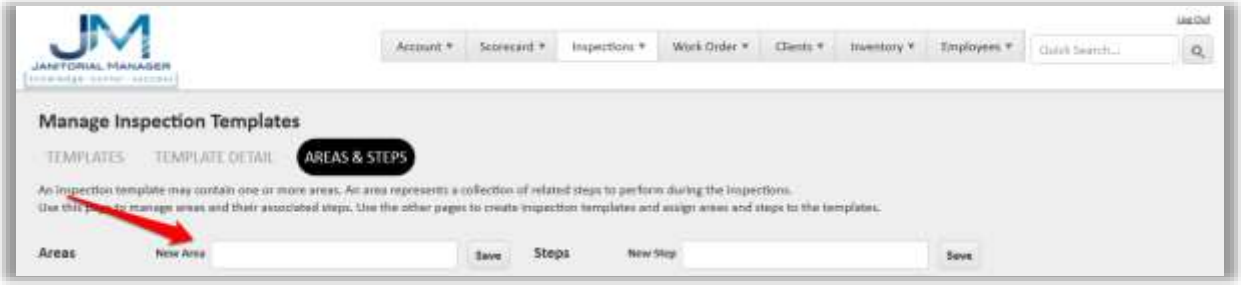


Figure 216

To add Steps to an Area, Click on the desired Area as seen in figure 216 below. Any Steps assigned to this area will appear on the right. Type the name of the new Step in the New Step field and click Save. The new Step will appear in the list on the right.

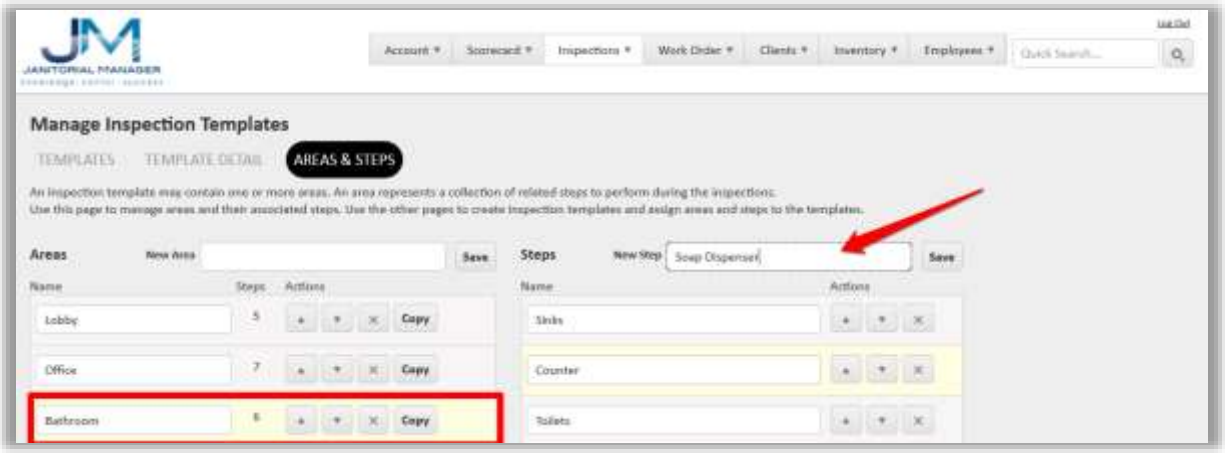


Figure 217

All Areas and Steps on this page will be available when creating or editing an inspection template.

Areas can me moved up or down in the list, deleted or copied. Steps can be moved up or down in the list or deleted. Figure 217.

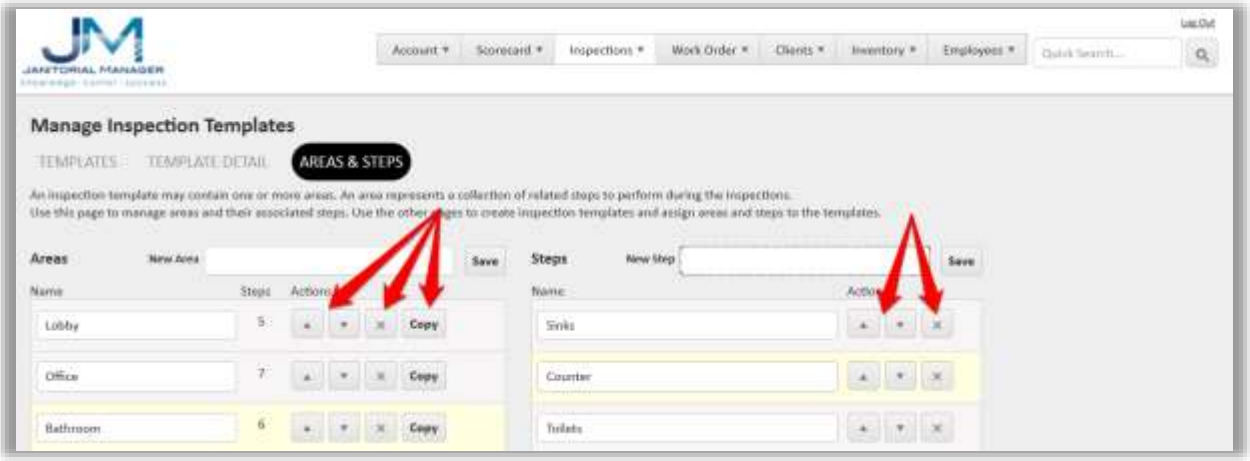


Figure 218

Create a New Inspection Template

To create a new template, select **Manage Templates** from the **Inspections** tab.

Figure 219

Select the Templates tab on the left. A list of existing templates will be displayed. To create a new Template, click the Add New Template button. Figure 219.

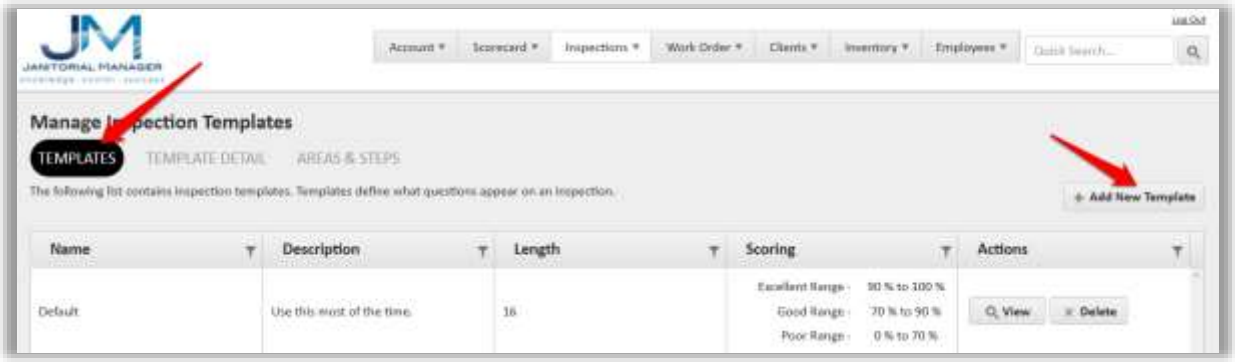


Figure 220

Provide a Template Name and Template Description and click *Save*. Figure 220.

Figure 221

The newly created inspection template will appear in the template list. Note that the inspection is not valid until Steps have been added. To add steps click the View button. Figure 221.

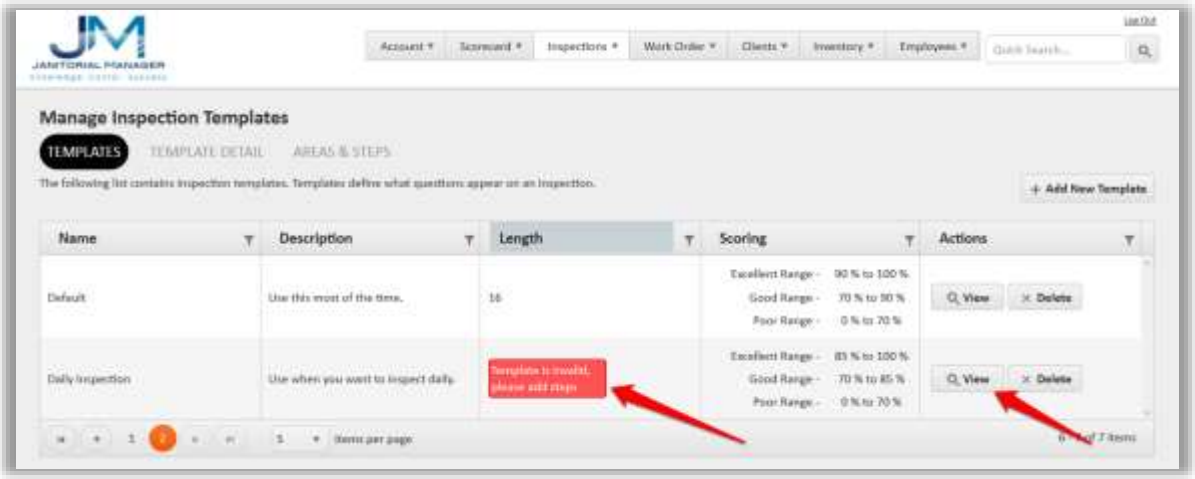


Figure 222

You will see the Template Detail page.

NOTE: As seen in Figure 222, the newly created inspection appears in the Template Name field but not in the Template drop down box. This is because it still does not have any assigned steps and is therefore yet not a valid inspection.

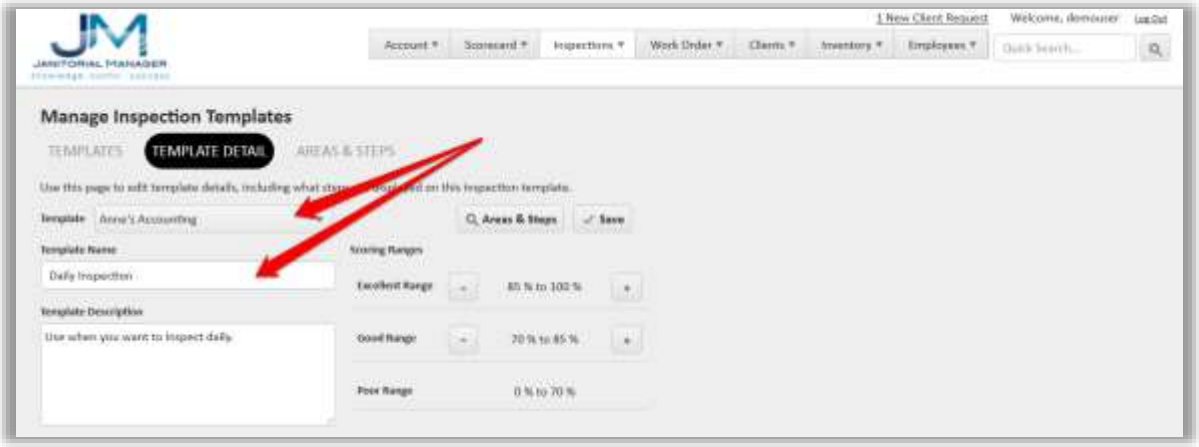


Figure 223

Click on the Areas & Steps button.

Figure 224

To add Areas and Steps to a template, click on an Area on the left and the available Steps for that Area will appear on the right. Click on the desired Steps for each Area. You can also *Add All* or *Remove All*. If no Steps are selected for an Area, neither the Area nor any of the associated Steps will appear in the template. When done, click the Back button. Figure 224.

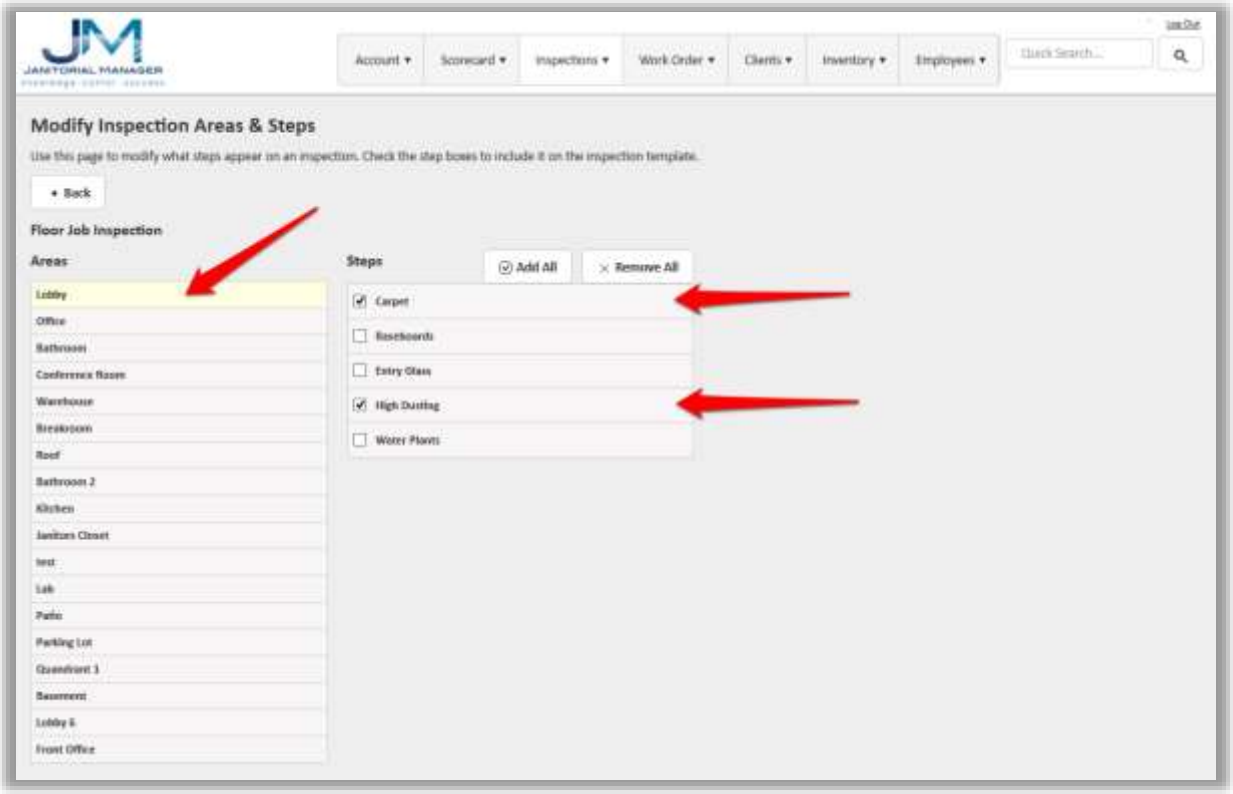


Figure 225

The Scoring Ranges for each template can be adjusted using the plus or minus buttons. Figure 225.

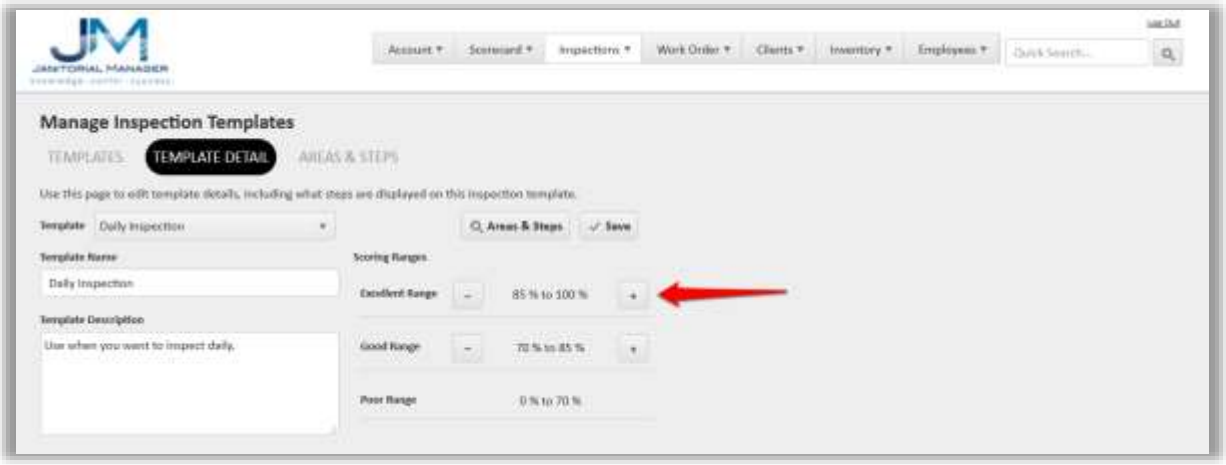


Figure 226

Click the Save button to complete the Inspection Template. The newly created Template will now appear in drop down box and is available to assign to clients. Figure 226.

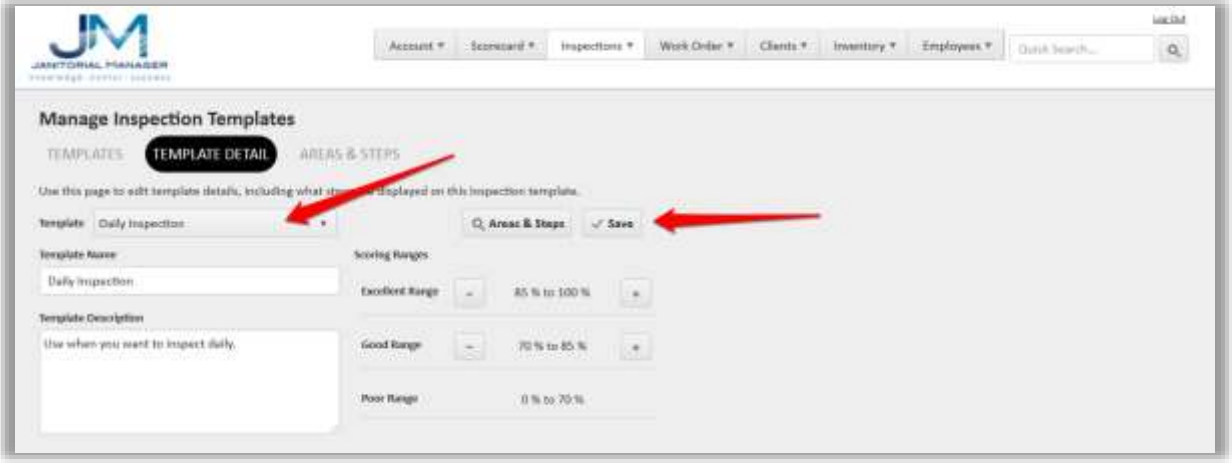


Figure 227

Schedule Recurring Inspections

To create a recurring inspection, select the **Inspections** tab and **Manage Inspections.**

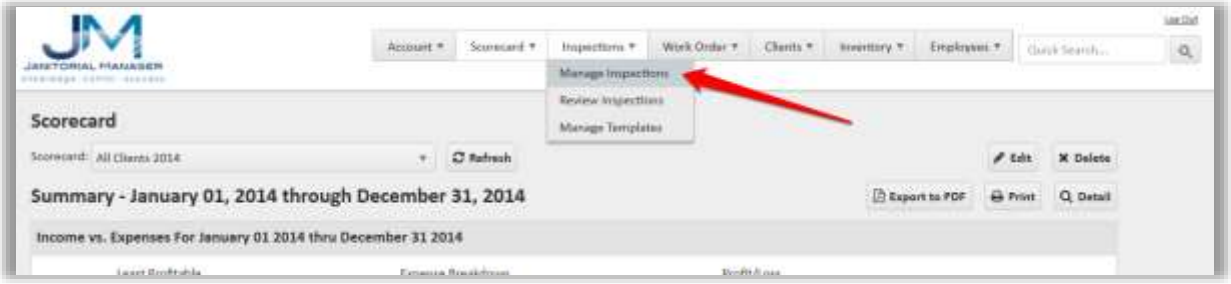


Figure 228

On the Manage Inspections page select the Schedule New Inspection button. Figure

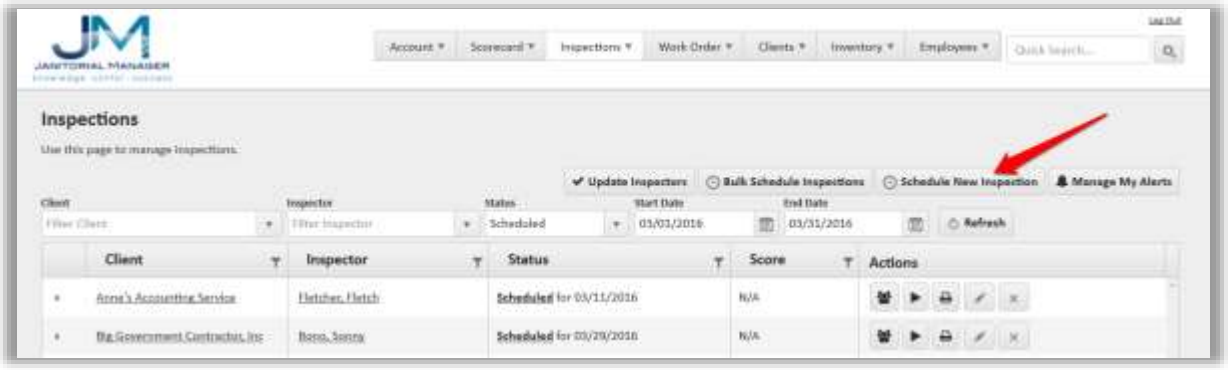


Figure 229

Complete the necessary fields and click the Save button. Figure 229.

Figure 230

Note: To apply the recurring inspection to all Clients, leave the Client field blank.

Figure 231

Edit Inspections

To edit a specific inspection, locate the desired inspection record using the filter options (Client, Inspector, Status, Date) and click the refresh button as seen below in figure 231.

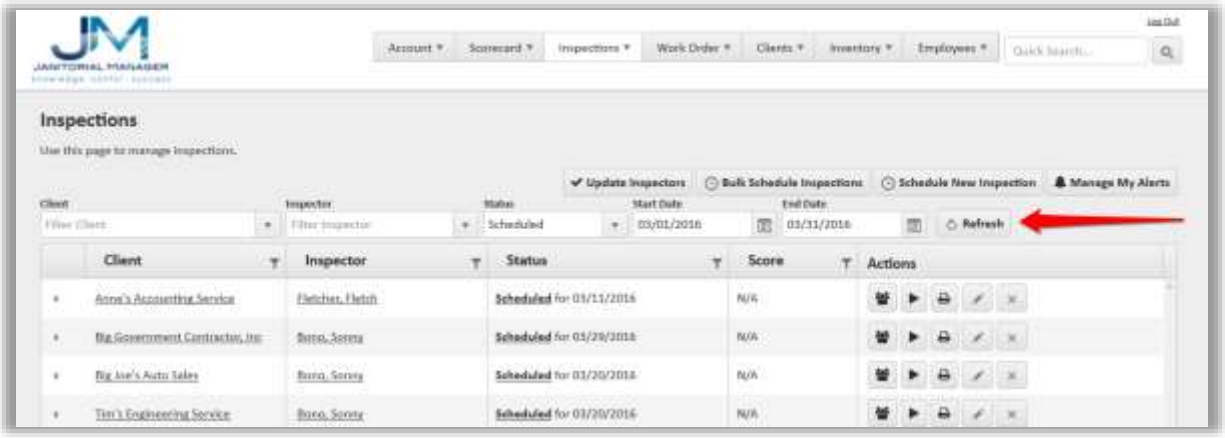


Figure 232

For the desired inspection record, click the Edit button as seen in figure 232.

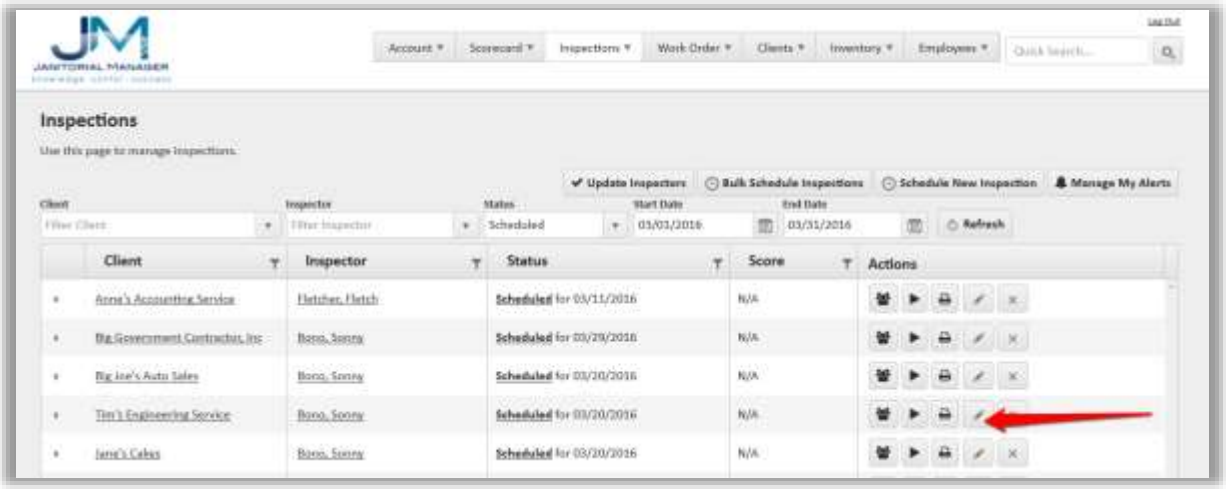


Figure 233

Make the required changes to the Inspection record and click the Save button. Figure 233.

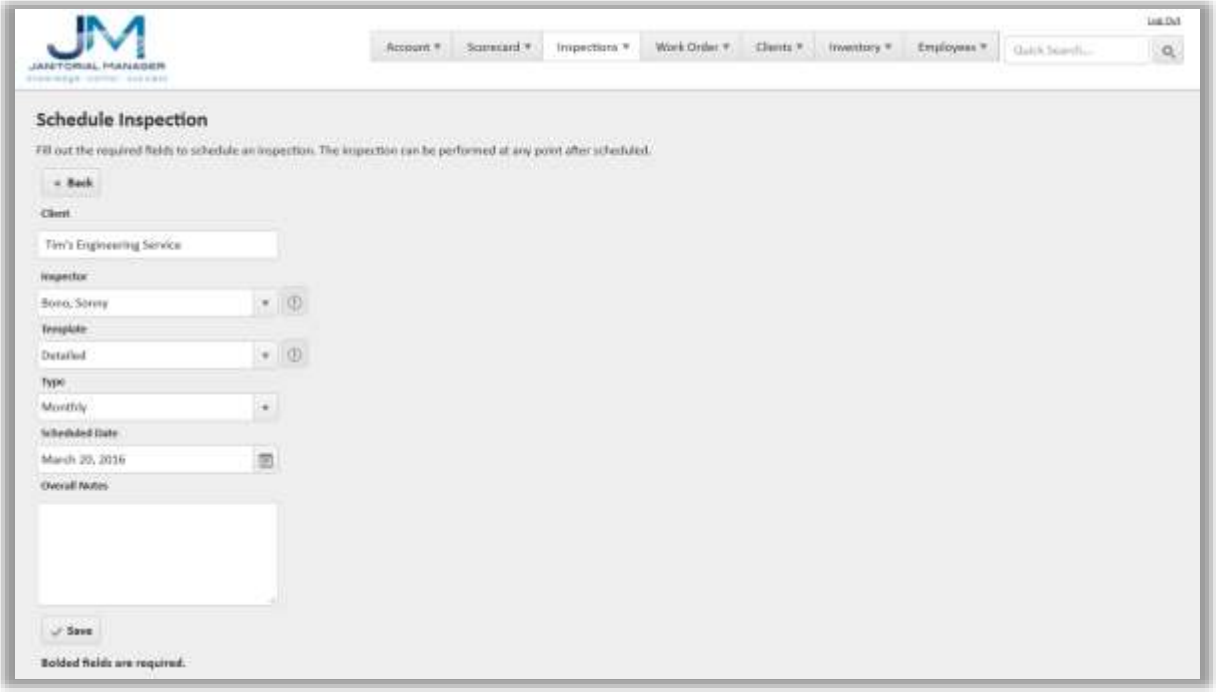


Figure 234

Change Inspectors

To change Inspectors for Series of scheduled inspections, select **Inspections** then **Manage Inspections**.

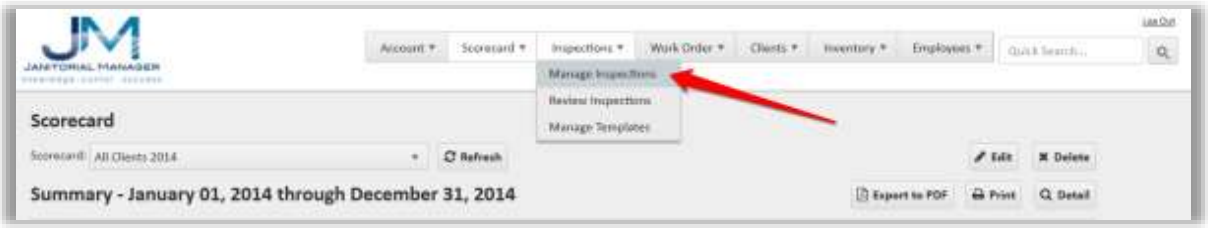


Figure 235

Select the Inspector that you want to replace from the Inspector drop down and click Refresh.

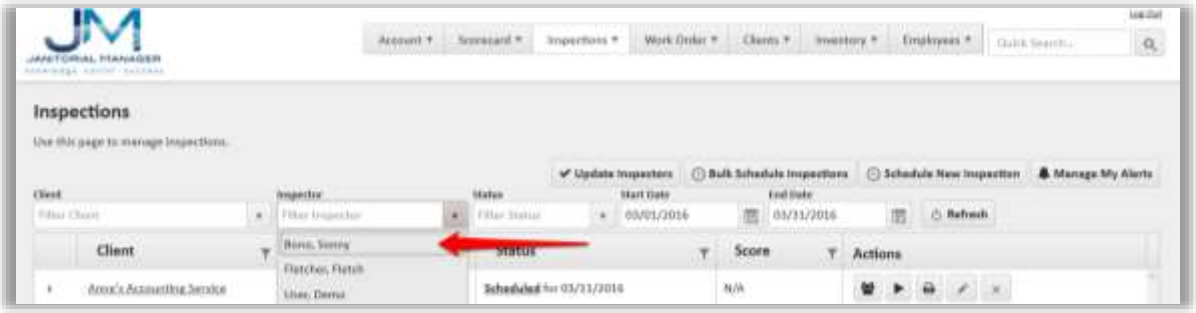


Figure 236

Select the **Update Inspectors** button. Figure 236.

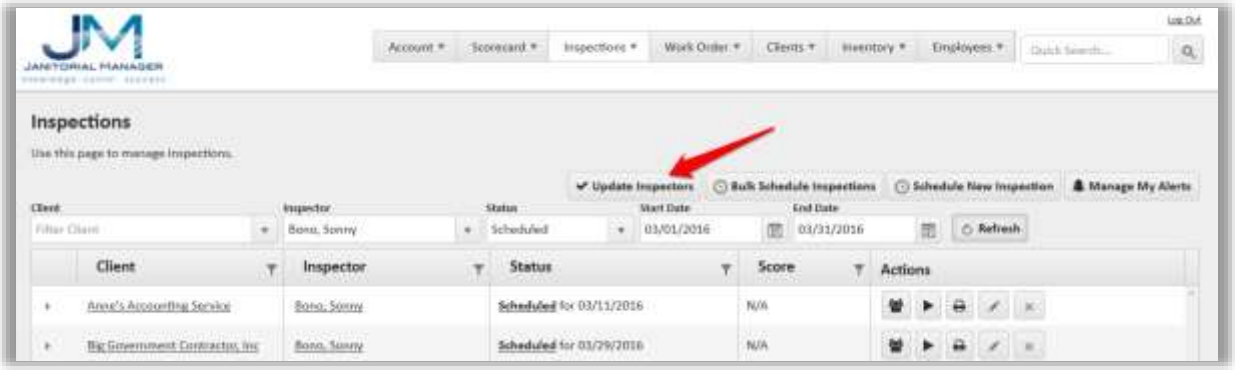


Figure 237

On the Update Inspectors page, select the new inspector from the drop down and click save. The selected inspector will now appear on all the scheduled inspections on this page.

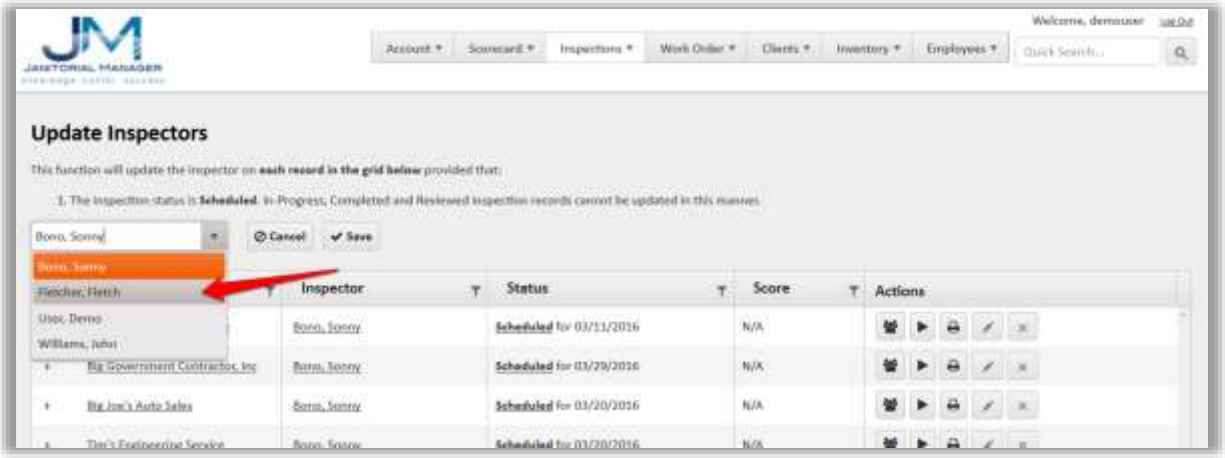


Figure 238

Set an Inspection Alert

To set an alert for the completion of an inspection, select **Inspections** then **Manage Inspections**.

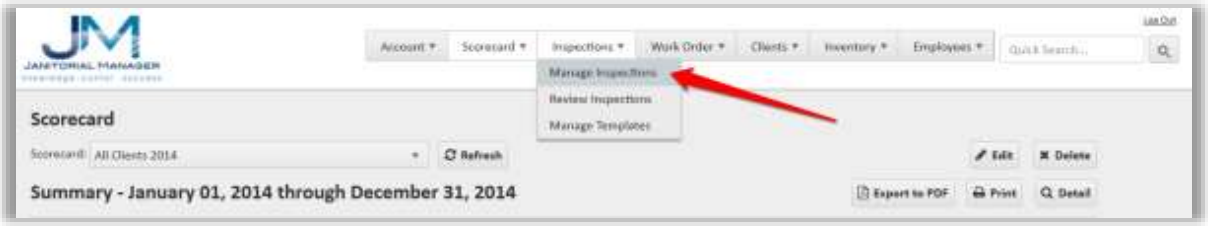


Figure 239

On the Inspections page, click the **Mange My Alerts** button.

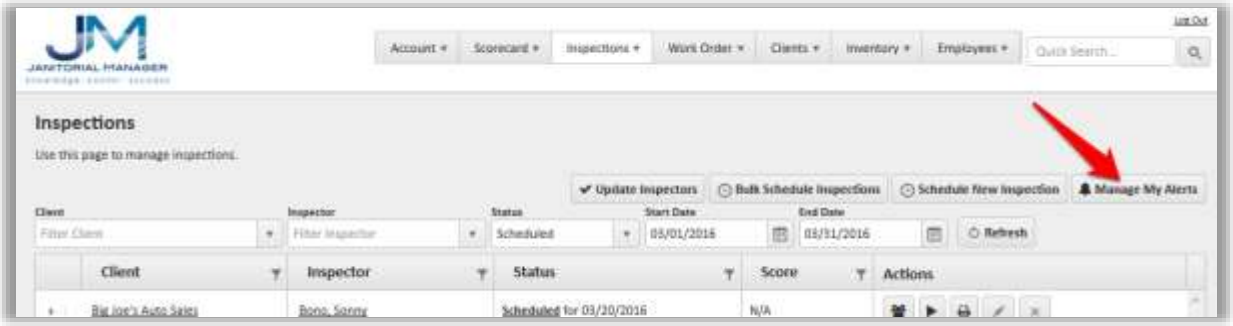


Figure 240

On the Manage My Alerts page, check the box next to Inspection Completed. When an inspection has been completed, the current user will receive an email.

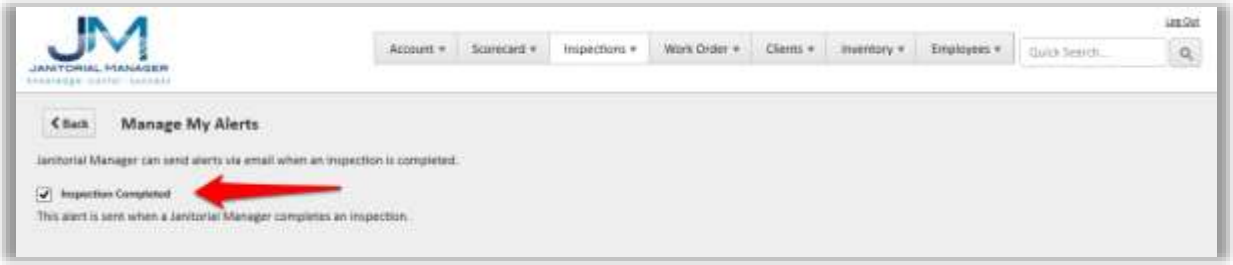


Figure 241

Conduct Inspections

Inspections are best conducted using a tablet. Select **Inspections** and then **Manage Inspections**.

Figure 242

On the **Inspections** page, use the filters to locate the desired inspection or series of inspections.

Filter by **Client, Inspector, Status** and **Date Range** then click **Refresh.**

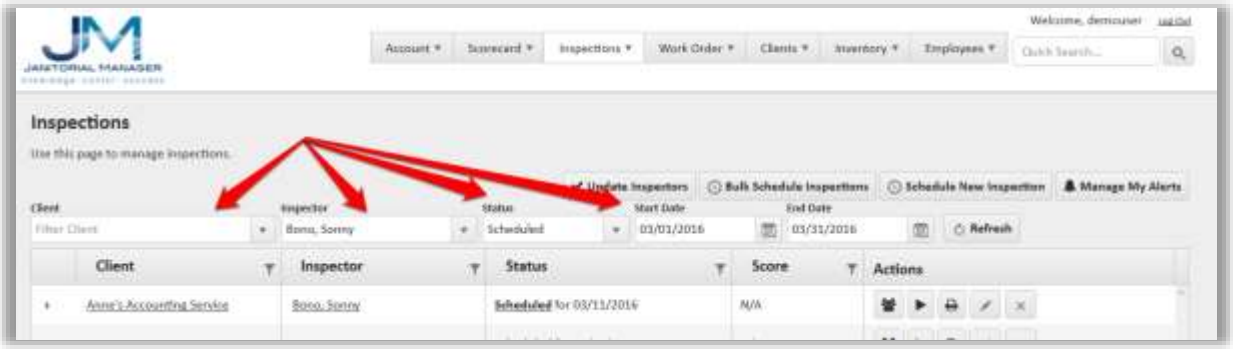


Figure 243

The filtered inspections will be displayed. Locate the desired inspection and click the **Start** button.

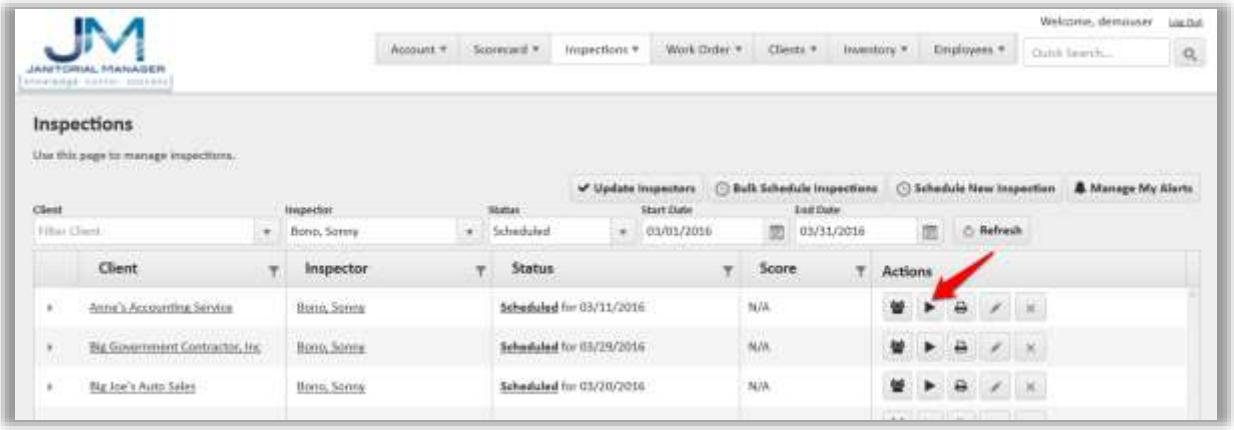


Figure 244

The Inspection Template will be displayed.

On the Inspection Template the Areas assigned to the template will appear each in section. To begin the inspection go to the first Area and click **View Steps**. Figure 244.

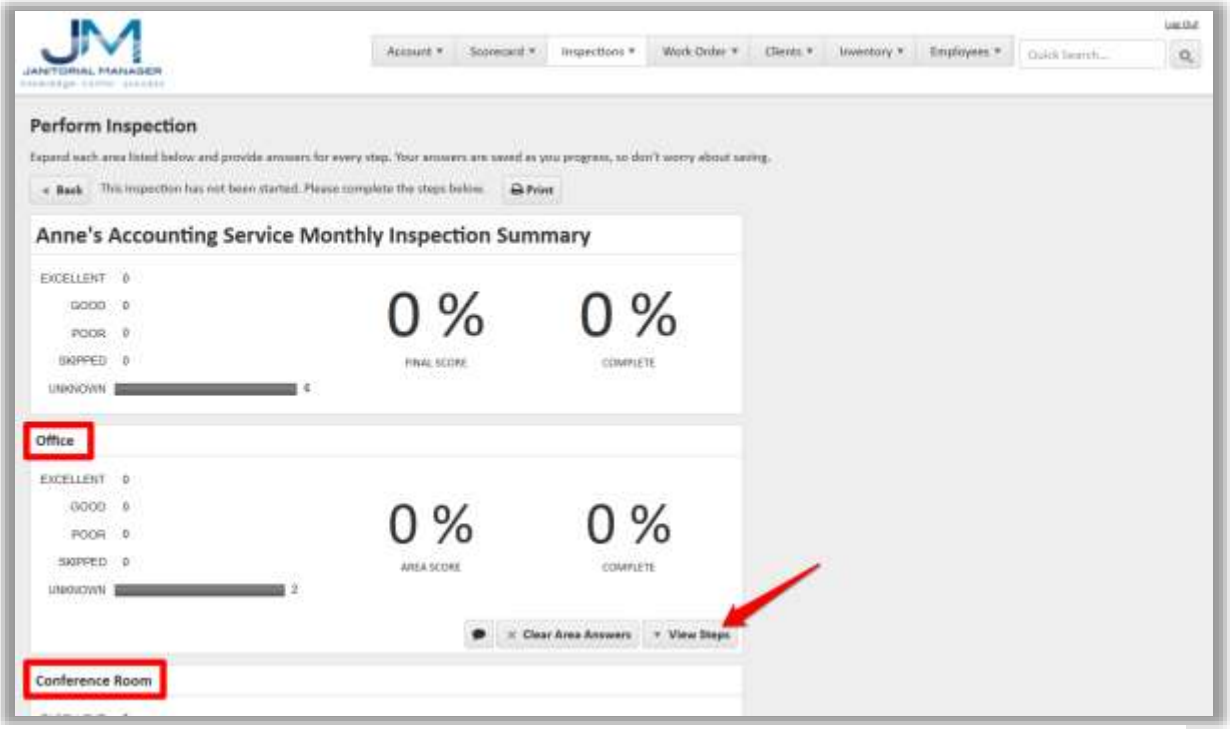


Figure 245

The Steps for that Area will be displayed. For each Step in the Area select a score the appropriate score.

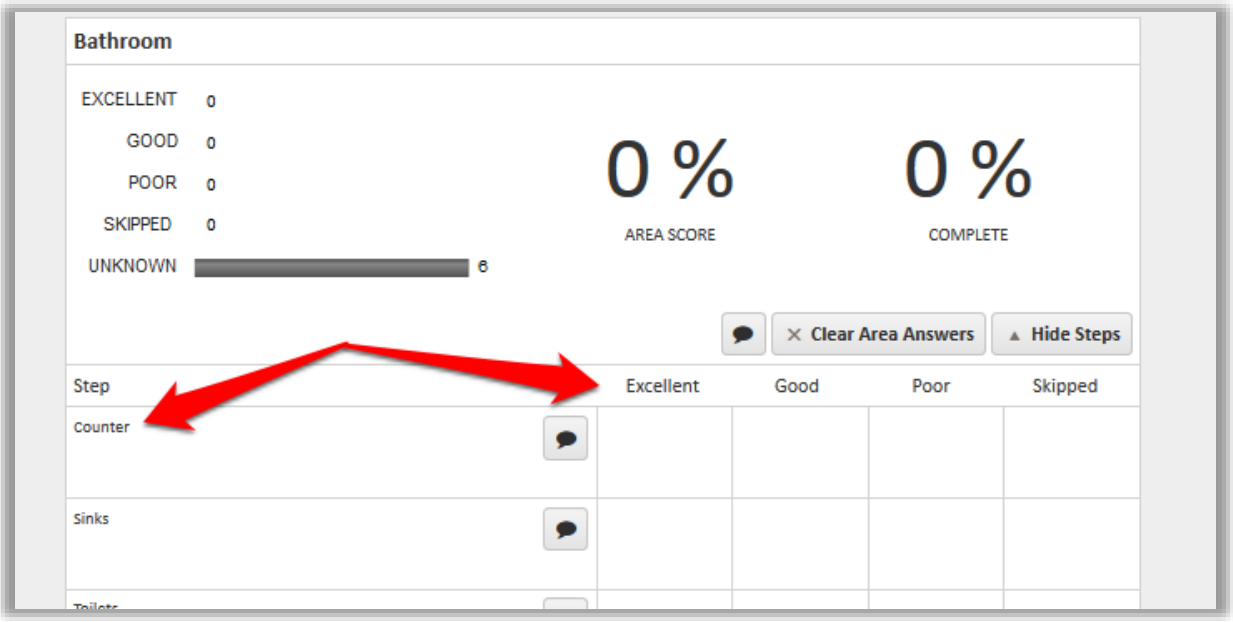


Figure 246

As the score is calculated for you as you complete each Area.

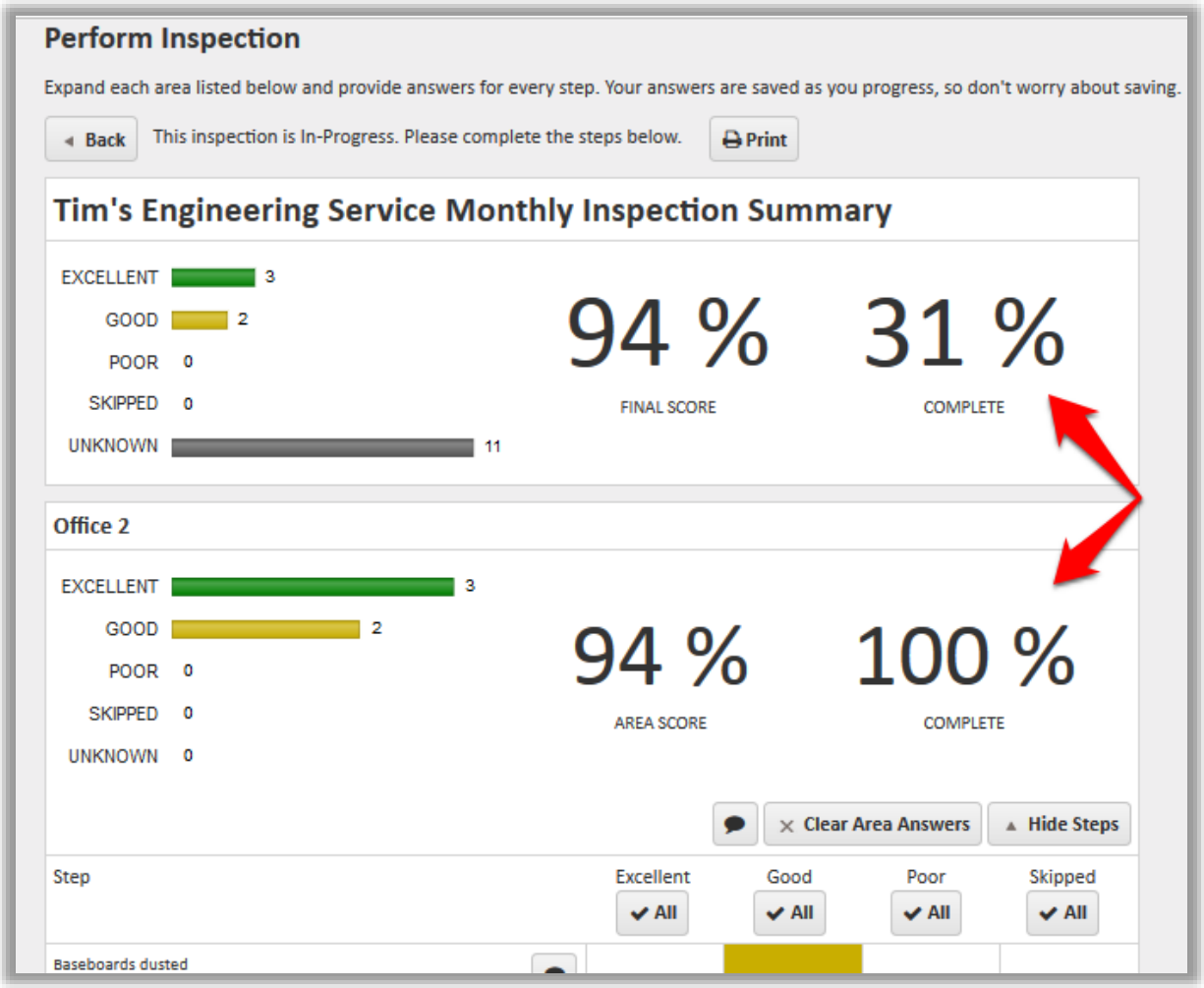


Figure 247

Steps can be skipped if they do not apply without negatively effecting the score.

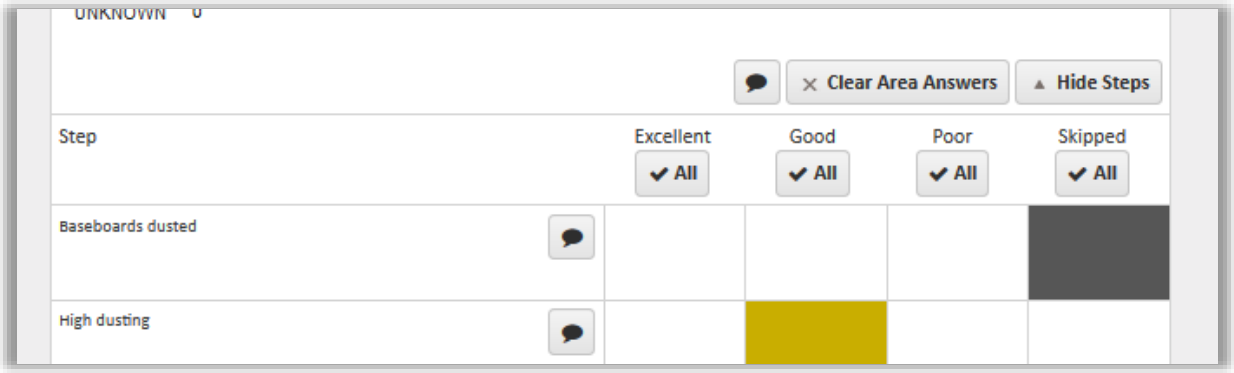


Figure 248

For each area, there is a select all option for scoring: Excellent, Good, Poor or Skip. Click the **All** button at the top of the column to apply the score to all Steps in the Area.

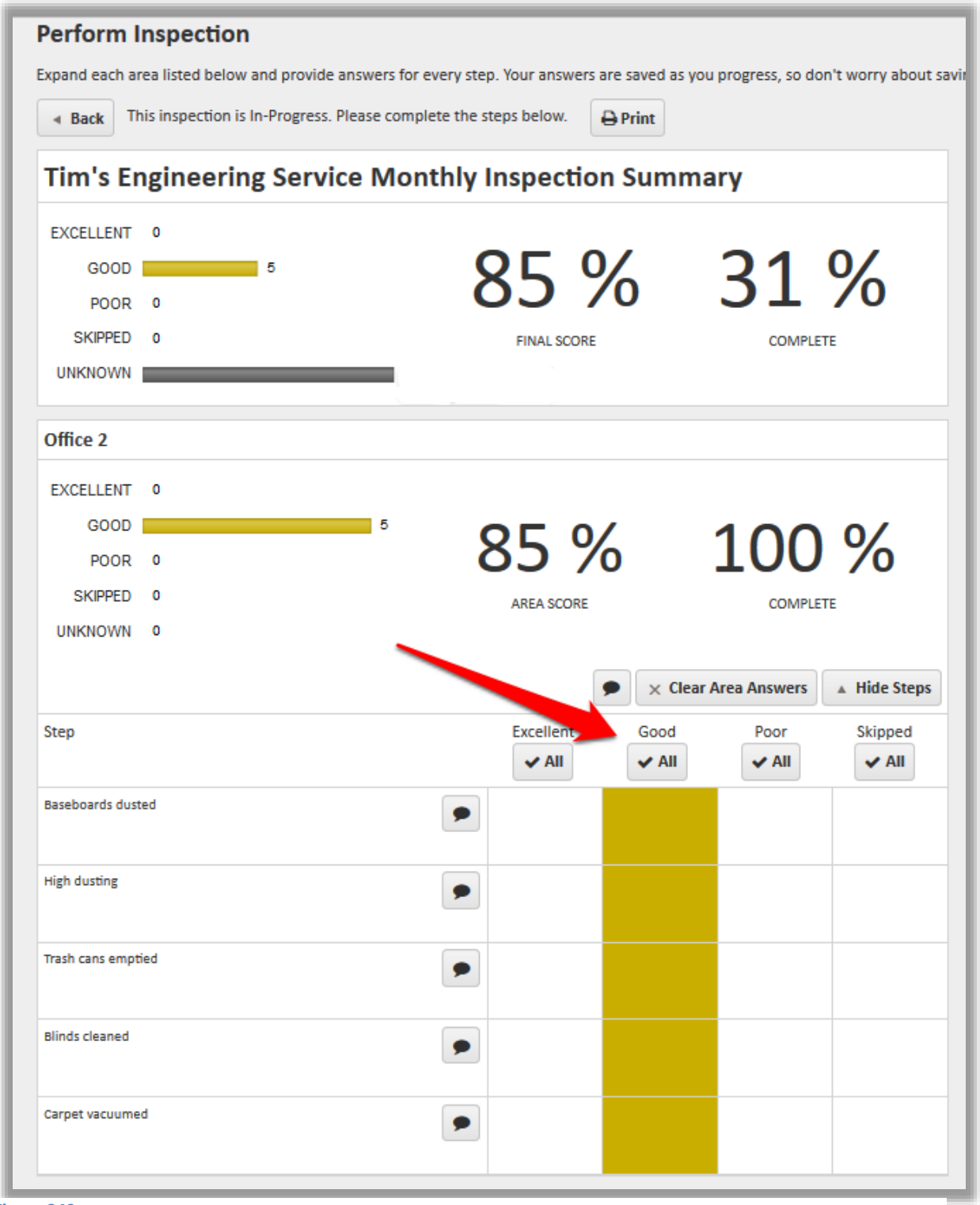


Figure 249

Notes can be taken at the Area and Step level. Click the appropriate note icon.

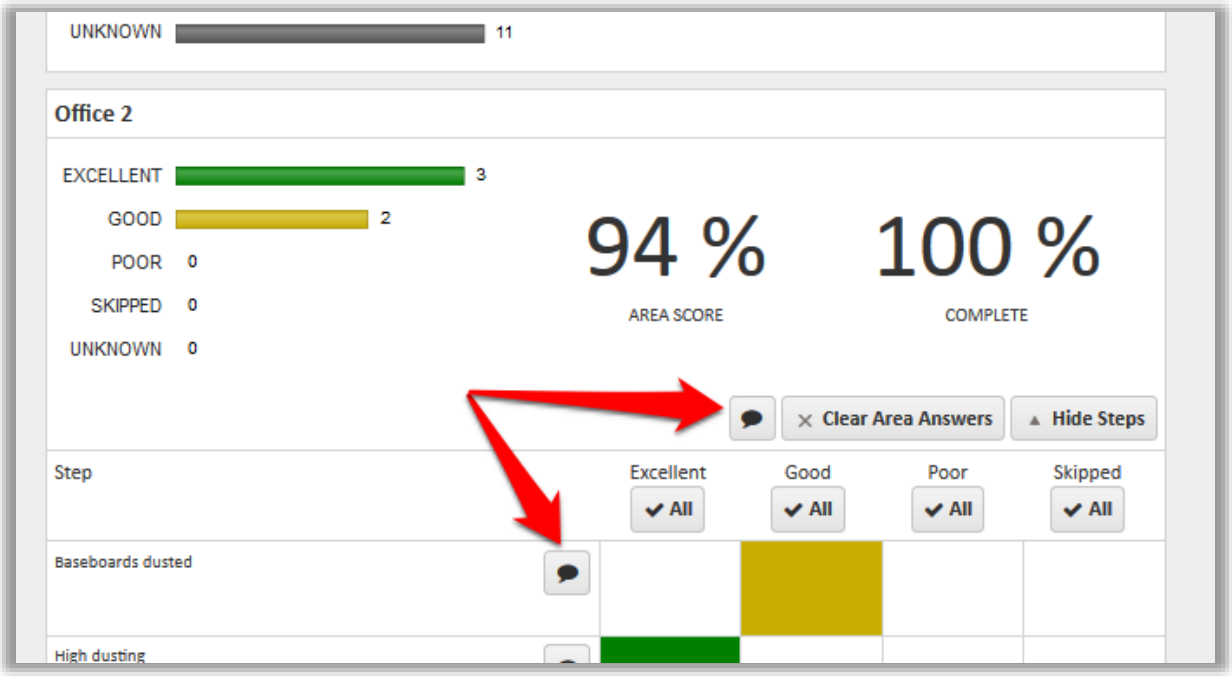


Figure 250

Take notes as necessary and click the **Save** button.

These notes will appear on the final inspection report.

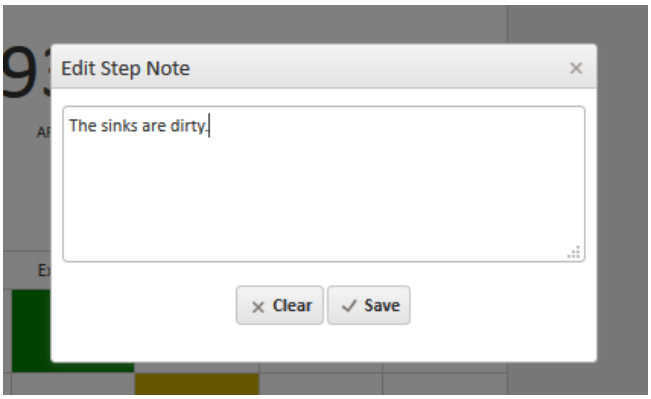


Figure 251

When all Steps have been scored, the **Complete Inspection** button appears at the top and bottom of the page.

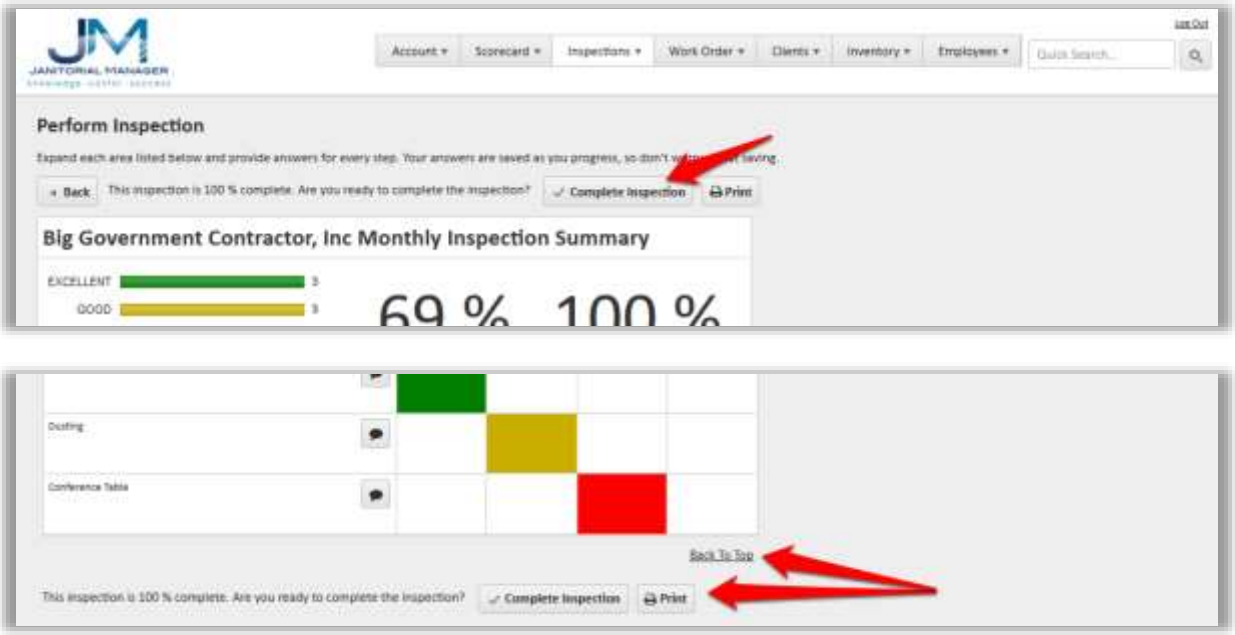


Figure 252

When satisfied with the inspection, click the **Complete Inspection** button. The Complete Inspection page will appear. On this page any final edits to the Inspectors, Inspection Type, and Scheduled & Performed on Dates can be made and any Overall Notes can be added. When complete, click **Save.**

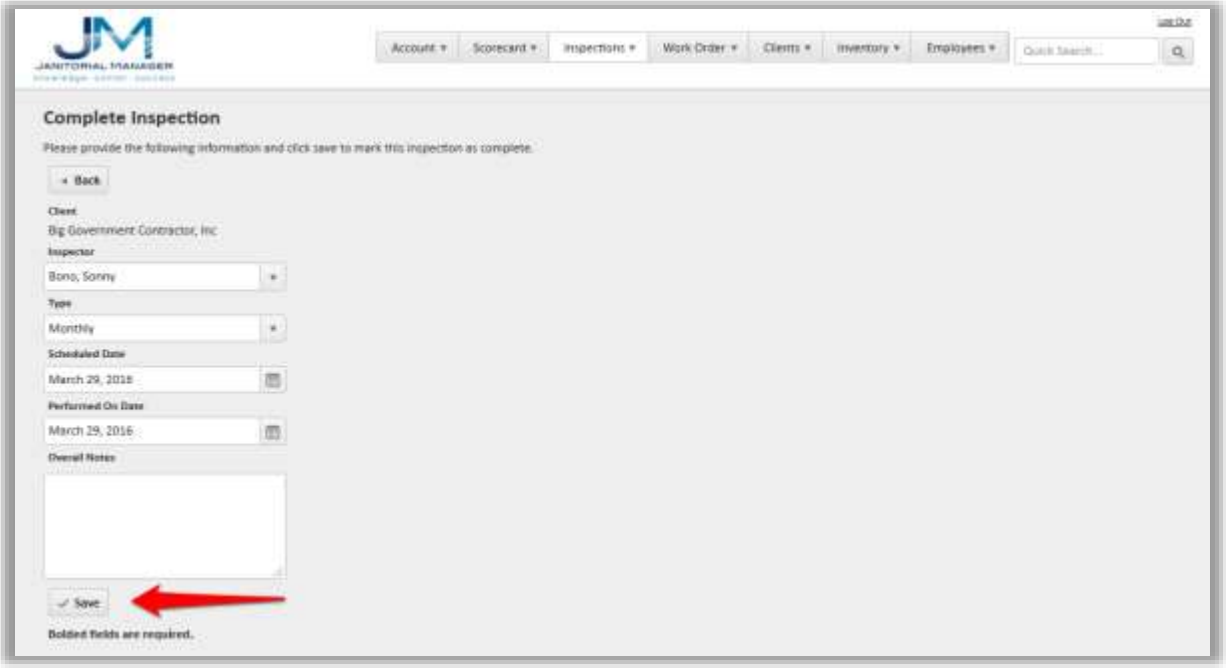


Figure 253

This will return you to the Manage Inspection page and will remove the completed inspection from the list of scheduled inspections.

Completed Inspections are moved from the Scheduled Inspection list to the Review Inspections page.

Note: Using the **Back** button during the inspection will not complete the inspection and will leave it in "**In Progress"** status.

Review Inspections

Completed inspection reports will show up in the Review Inspections section as quickly as they are completed. Completed inspections can be reviewed and issues can be addressed.

To review an inspection, click the arrow to the left of the Client name. Figure 242.

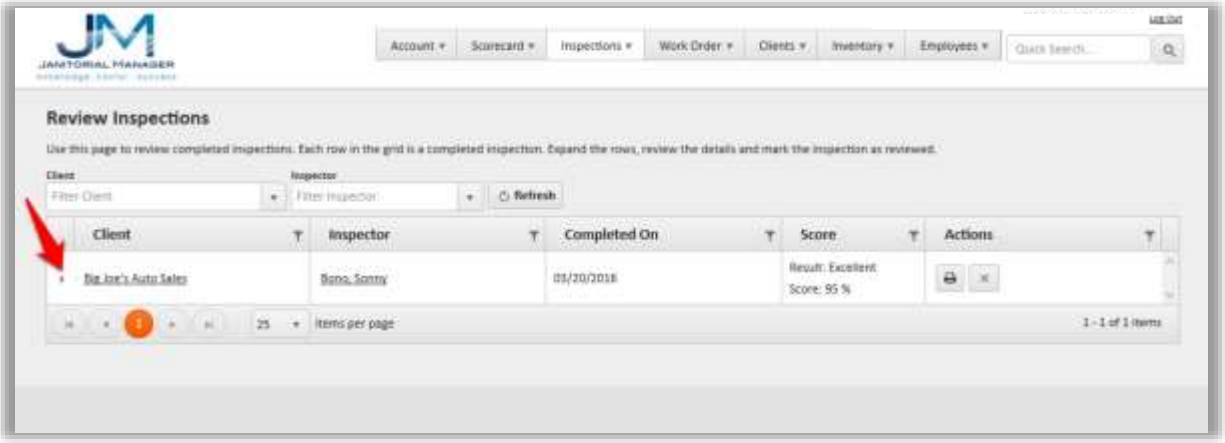


Figure 254

Clicking the arrow to the left of the Client name provides an Inspection Report with any Overall Notes.

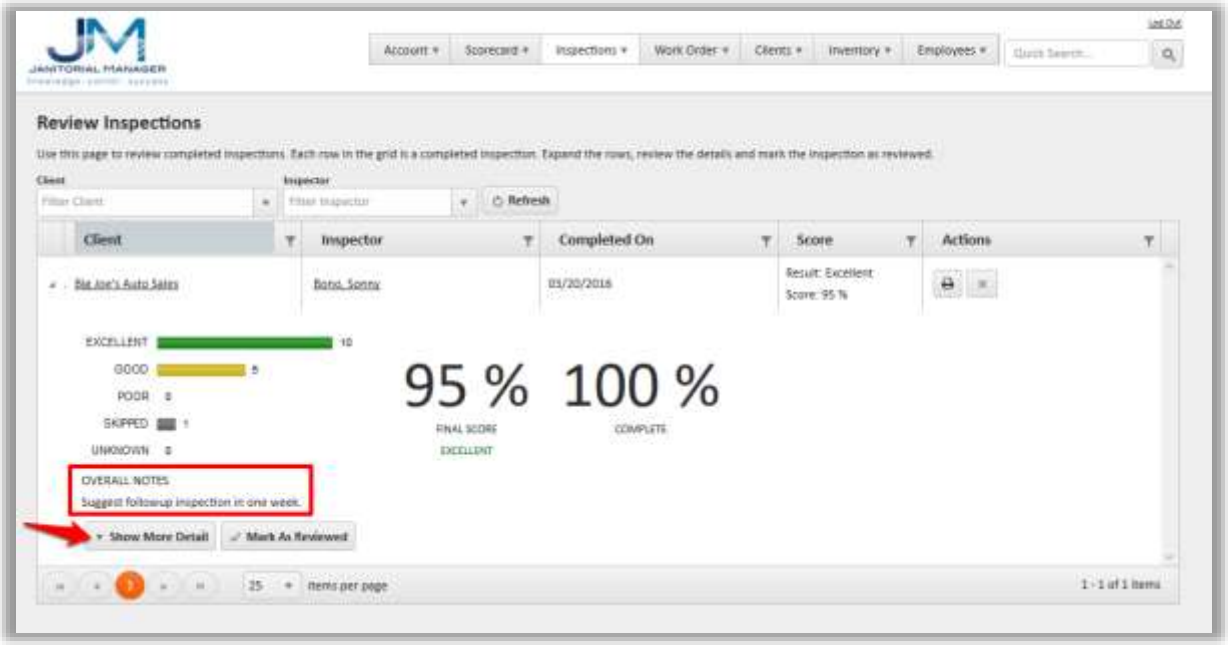


Figure 255

Click **Show More Detail** to review the

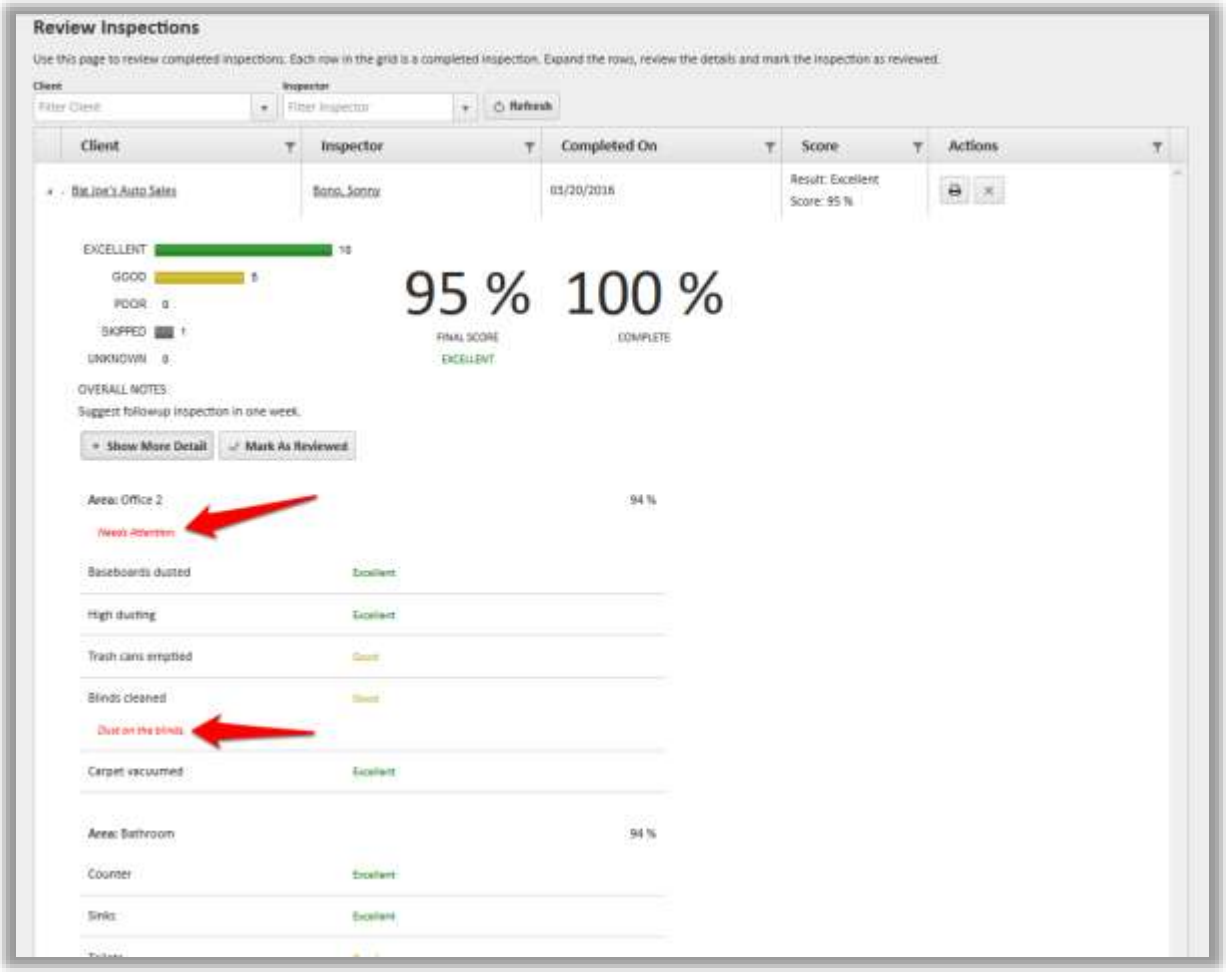


Figure 256

Segmentation

Clients, Employees and Users can be assigned to segments. Segments can be created based on any criterial and can be used for reporting or controlling user access.

Create a Segment

To create a segment, select the **Account** tab and then **Manage Segments.**

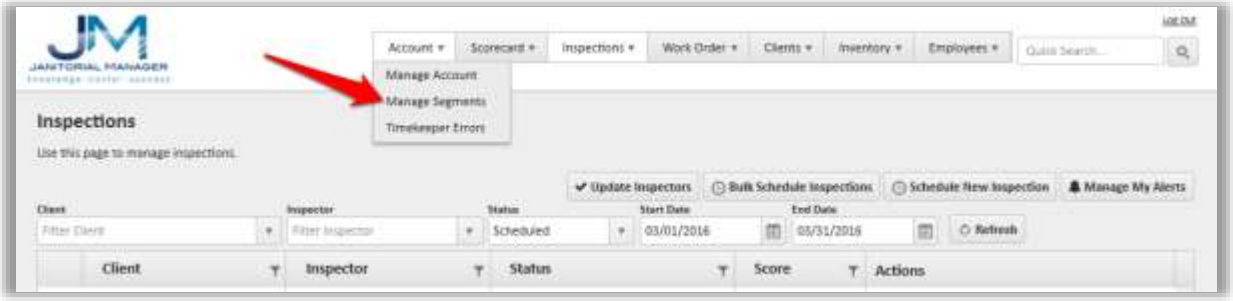


Figure 257

Click the **Add New Segment** button.

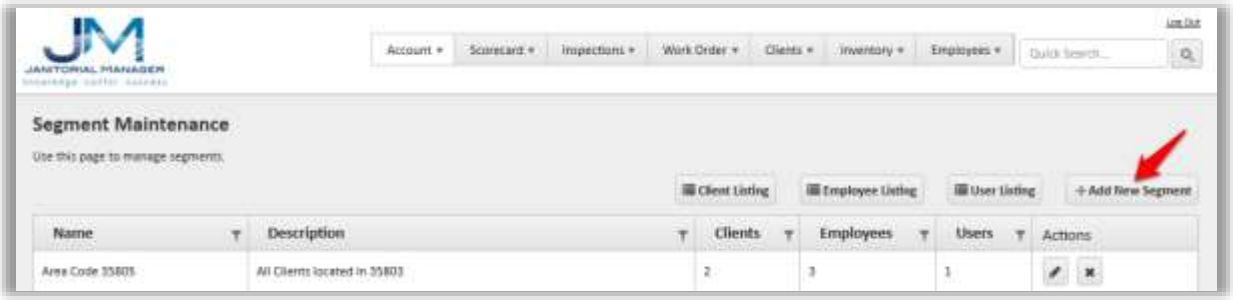


Figure 258

In the Add New Segment window, name your new segment and add an optional description. Then click **Save.**

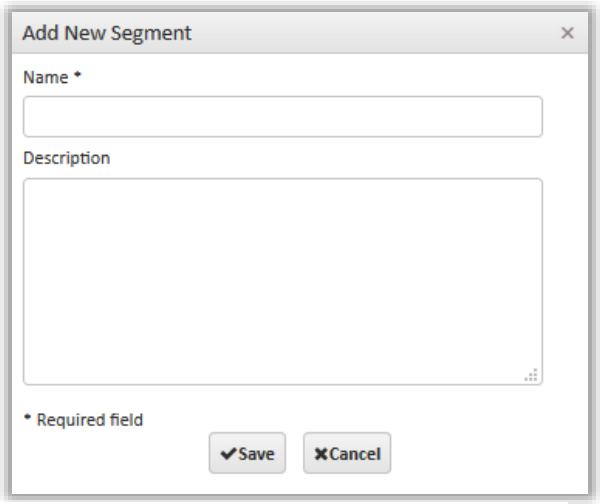


Figure 259

Delete a Segment

To delete a Segment, select the **Account** tab and then **Manage Segments.**

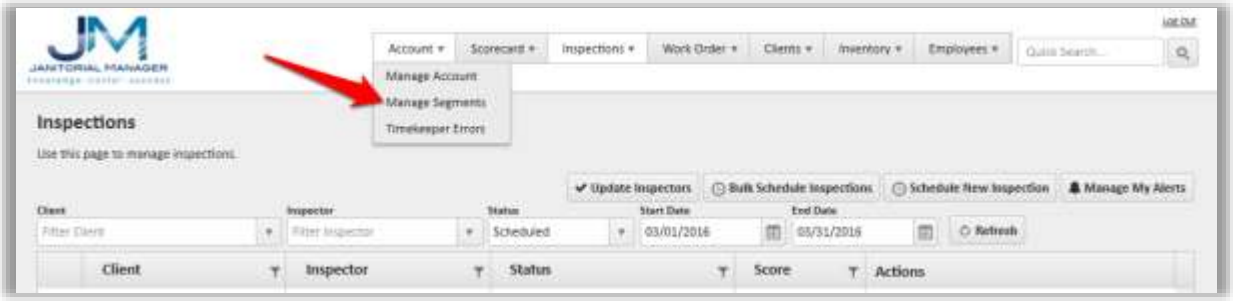


Figure 260

Locate the Segment that is to be deleted and click the **Delete** button in the Actions column.

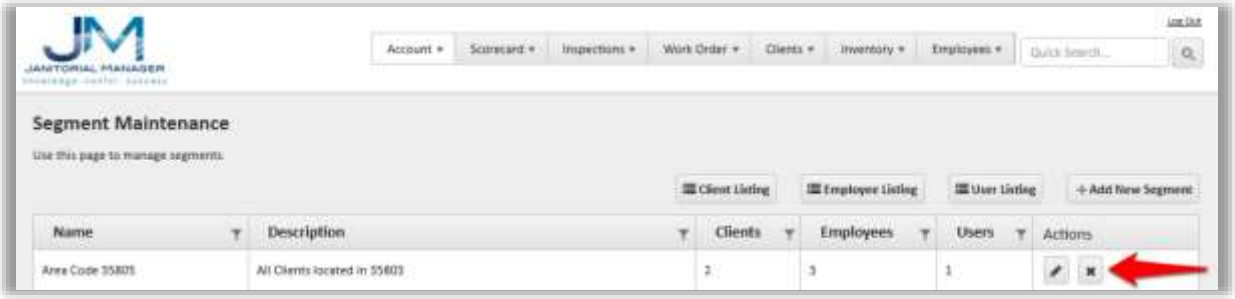


Figure 261

Add Clients to a Segment

To assign a Client to a Segment, select the **Account** tab and then **Manage Segments.**

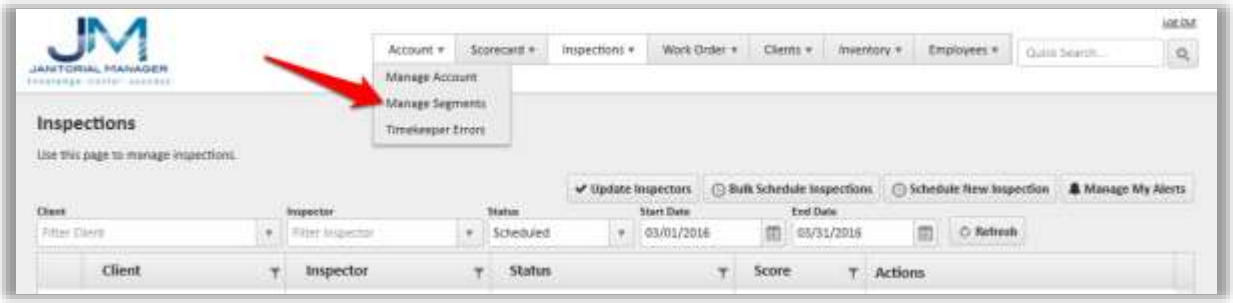


Figure 262

On the Segmentation Maintenance page, click the **Client Listing** button.

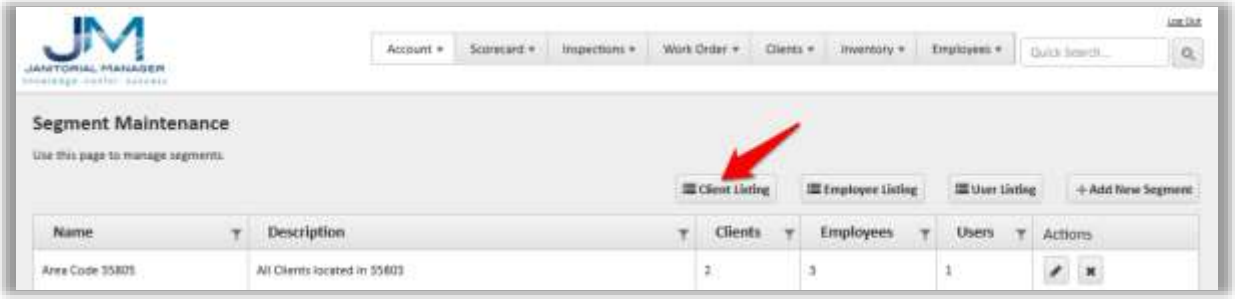


Figure 263

A list of clients will be displayed. For the desired client select the applicable Segment from the drop down menu. Clients can only be applied to one Segment.

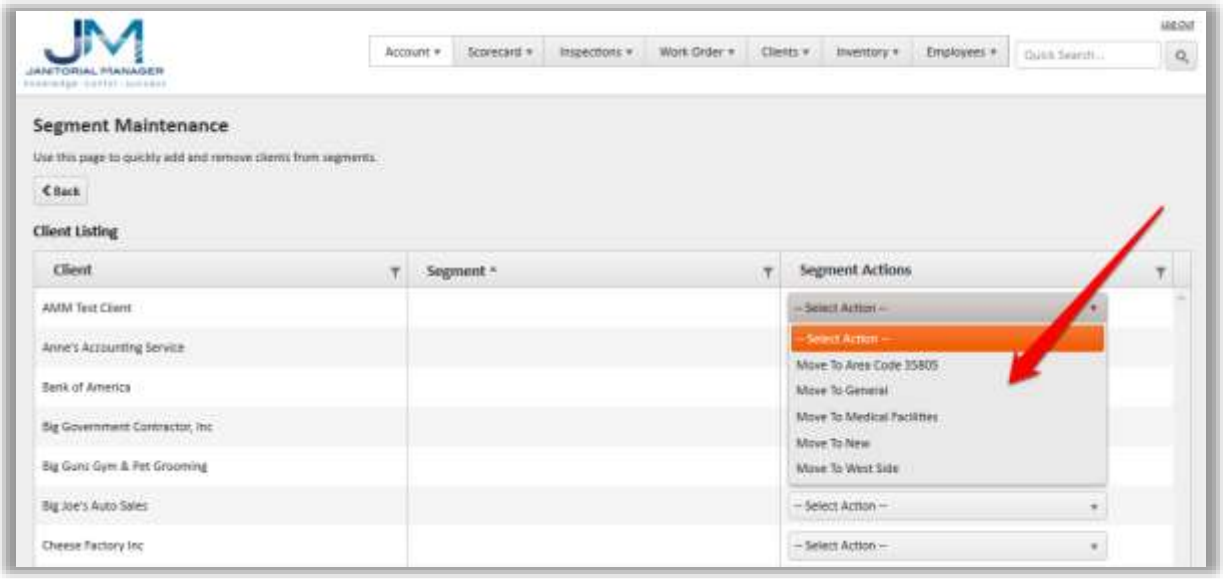


Figure 264

Remove a Client from a Segment

To remove a Client from a Segment, select the **Account** tab and then **Manage Segments.**

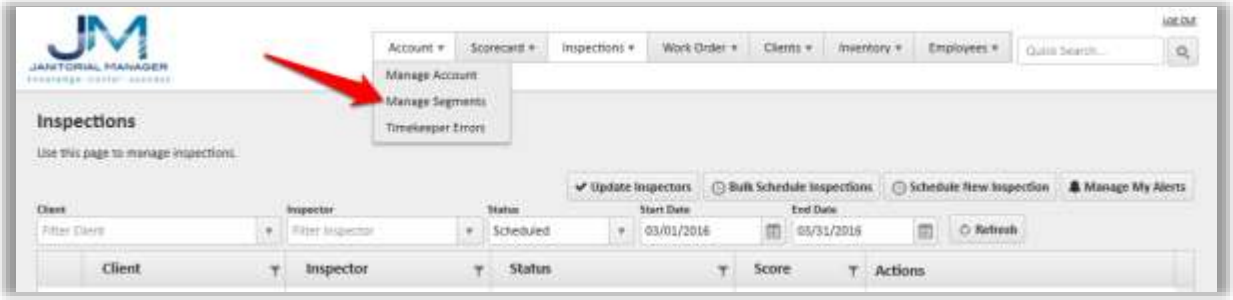


Figure 265

Select the **Client Listing** button.

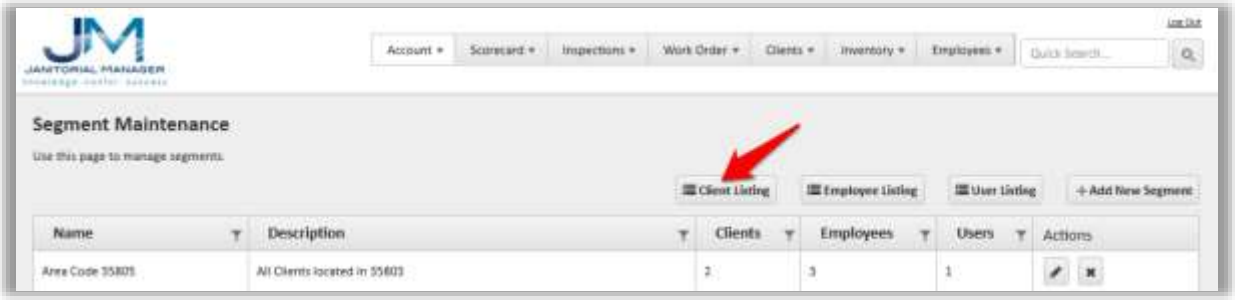


Figure 266

Find the Client that must be changed. Click the **Select Action** button from the Segment Actions column. Select "Remove from….." to remove a Client from its current segment and return it to a status of "no segment." To change a Client to different Segment, simply select the desired segment from the **Select Action** drop down.

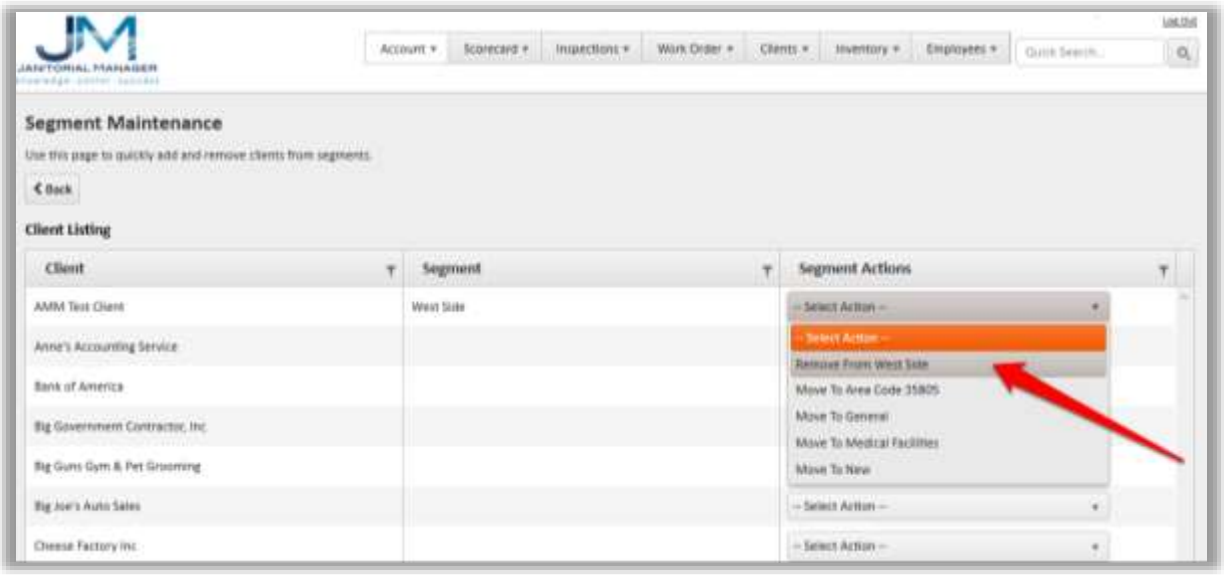


Figure 267

Add an Employee to a Segment

To add an employee to a Segment, select the **Account** tab and then **Manage Segments.**

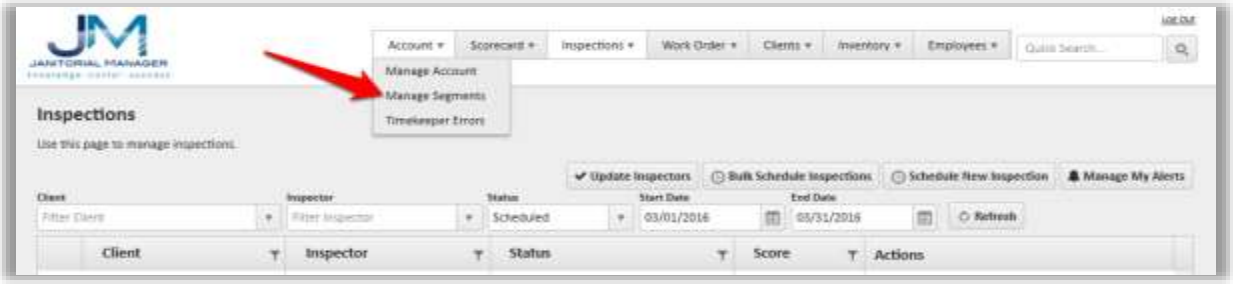


Figure 268

Select the **Employee Listing** button.

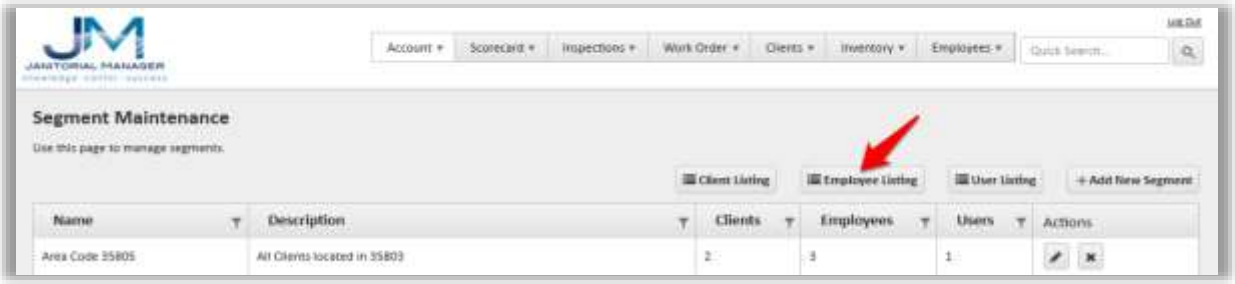


Figure 269

Find the desired Employee and click the **Add Segment** drop down from the Add Segments column. Select the desired segment and click the Add button. Employees can be added to multiple segments. To remove an employee from a segment, simply click the **X** next to segment to be removed.

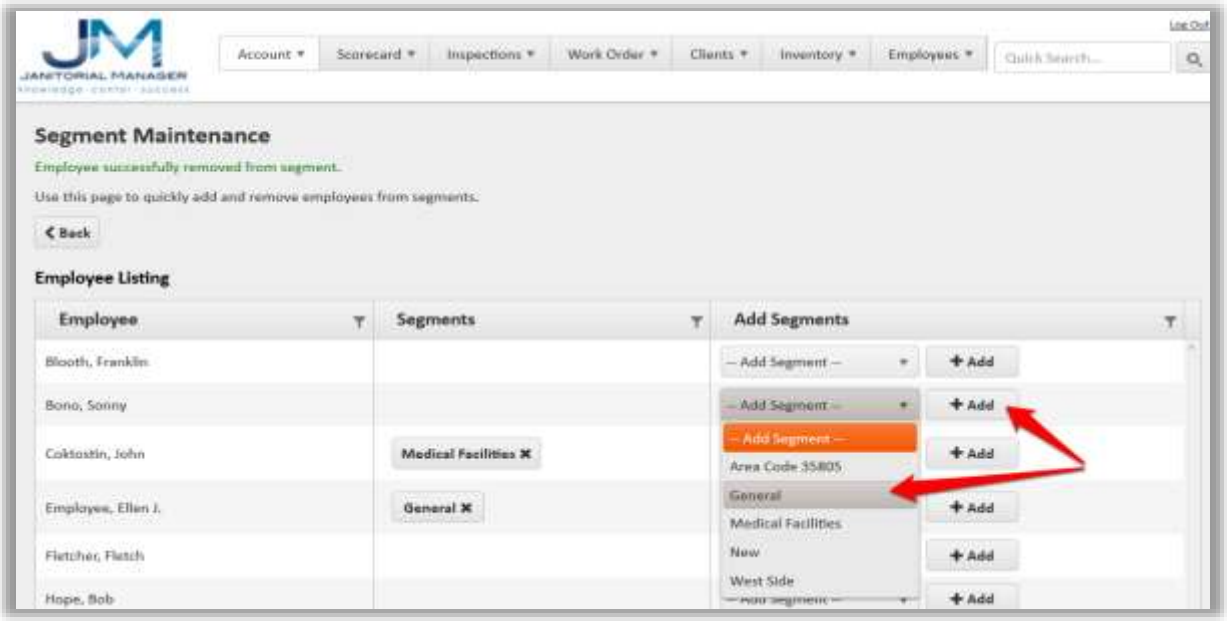


Figure 270

Remove an Employee from a Segment

To remove an employee from a Segment, select the **Account** tab and then **Manage Segments.**

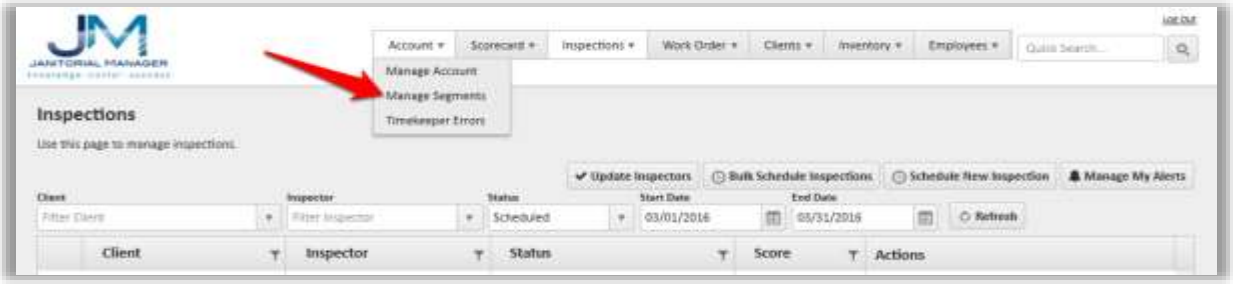


Figure 271

Select the **Employee Listing** button.

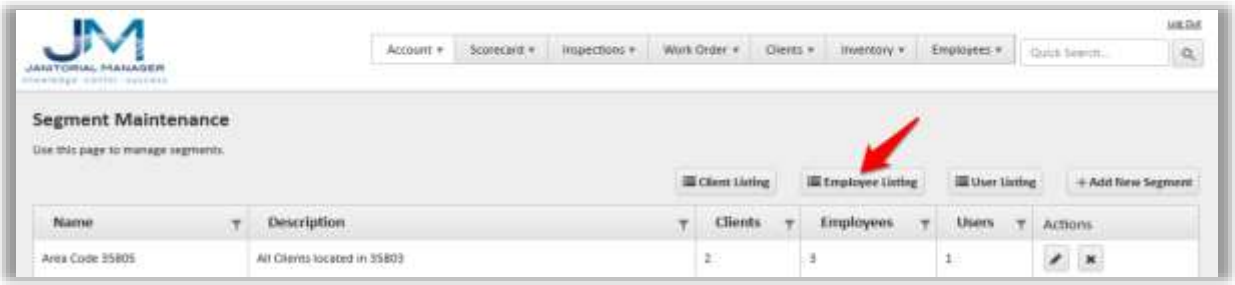


Figure 272

Find the desired Employee in the segment list. To remove an employee from a segment, simply click the **X** next to segment to be removed.

Figure 273

Add a User to a Segment

To add a User to a Segment, select the **Account** tab and then **Manage Segments.**

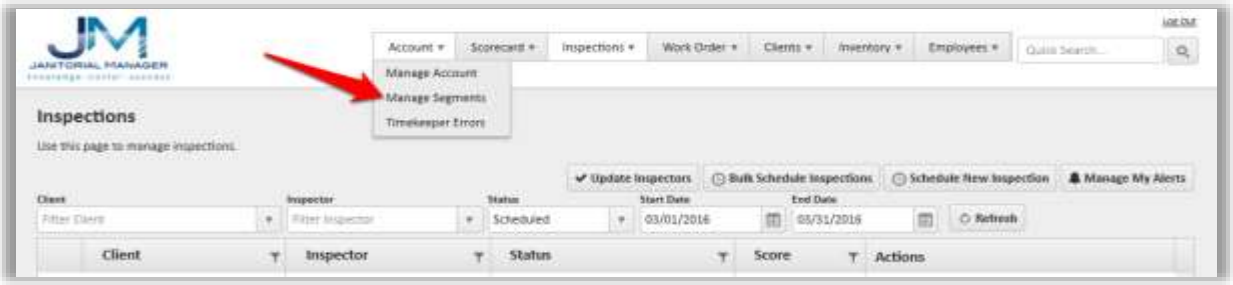


Figure 274

Select the **User Listing** button.

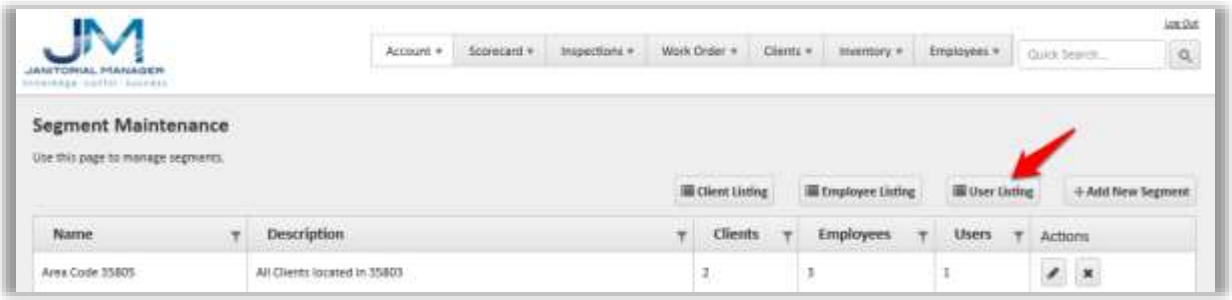


Figure 275

Find the desired User and click the **Add Segment** drop down from the Add Segments column. Select the desired segment and click the **Add** button. Users can be added to multiple segments. Users will only be able to see data in the segments to which they are added.

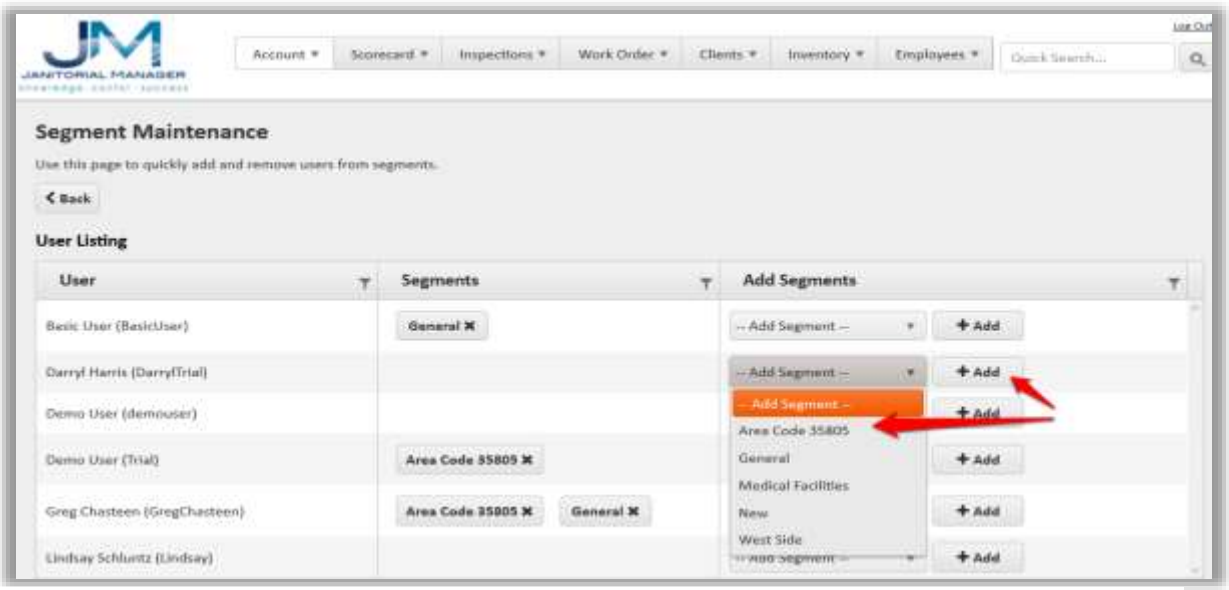


Figure 276

Remove a User from a Segment

To remove a User from a Segment, select the **Account** tab and then **Manage Segments.**

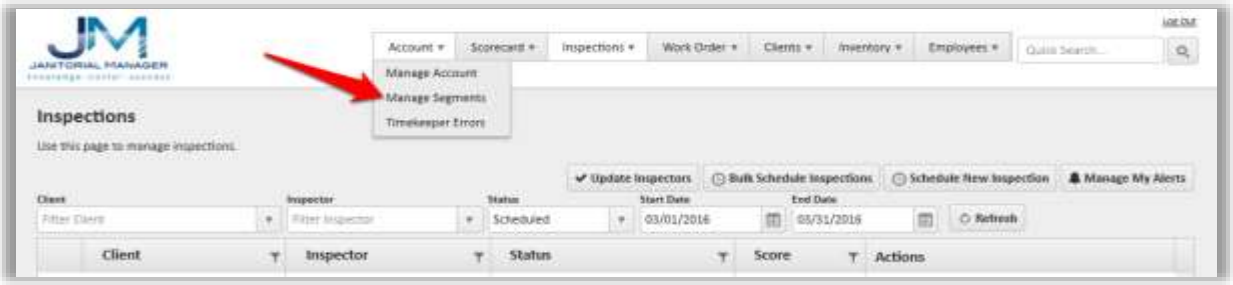


Figure 277

Select the **User Listing** button.

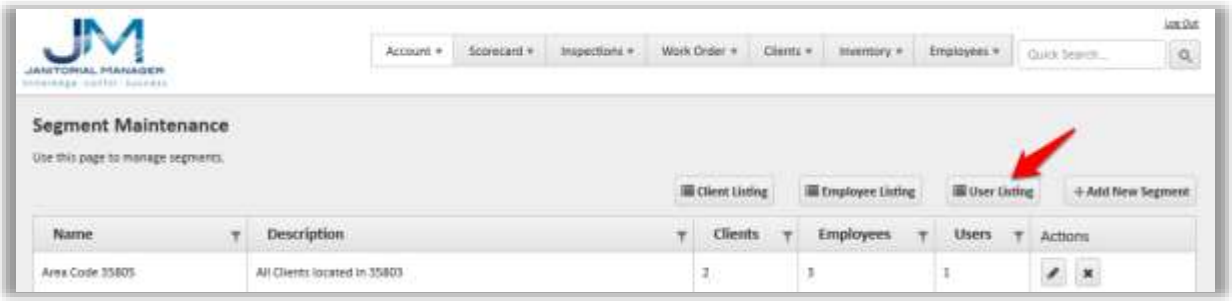


Figure 278

Find the desired User in the segment list. To remove an User from a segment, simply click the **X** next to segment to be removed

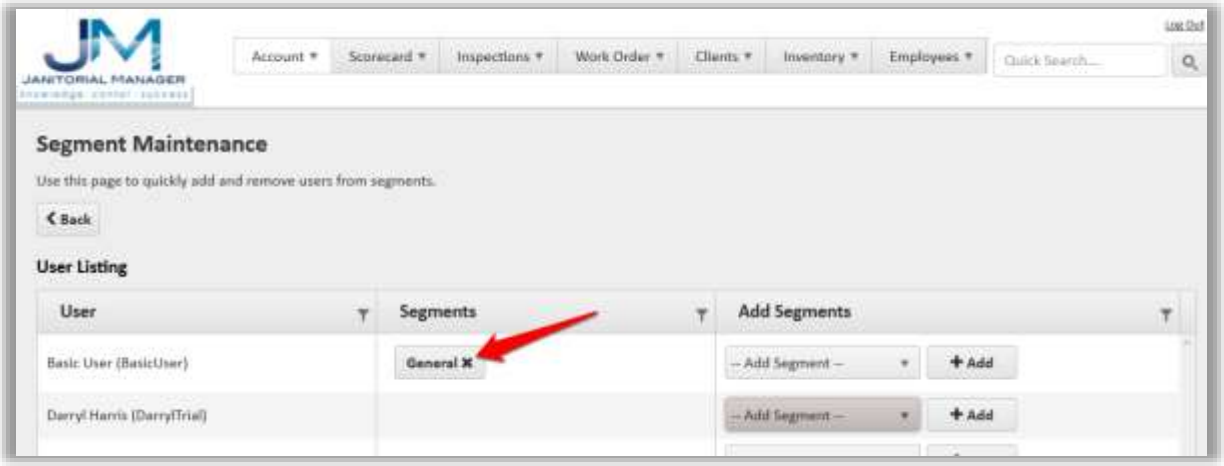


Figure 279

Manage Services

Additional services or tag work can be created and described in JM.

Add New Service

To create Services, go to the **Clients** tab and **Manage Services**.

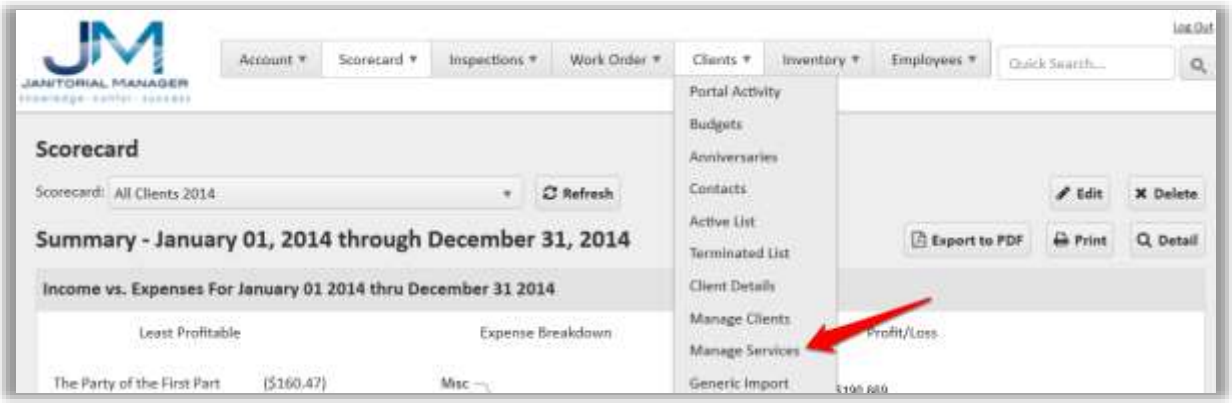


Figure 280

On the Services Maintenance page click **Add New Service**.

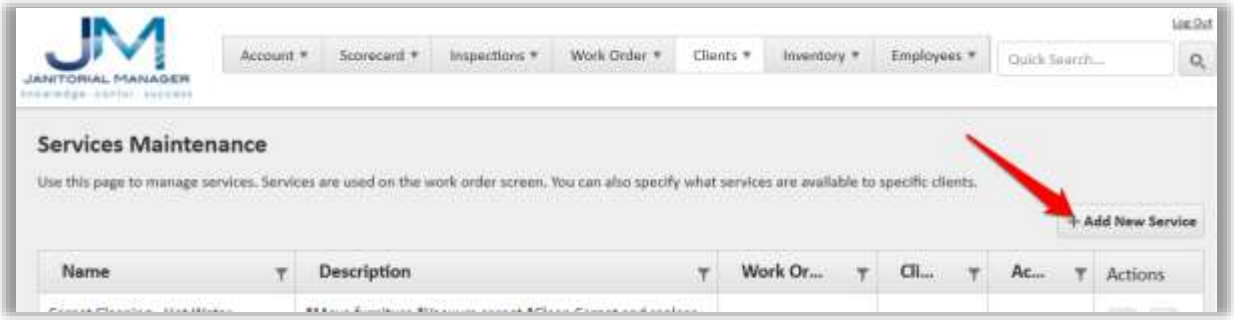


Figure 281

Complete the **Add New Service** form.

Figure 282

Services will appear in the appropriate drop down boxes throughout the system.

Edit a Service

To edit an existing Service, go to the **Clients** tab and **Manage Services.**

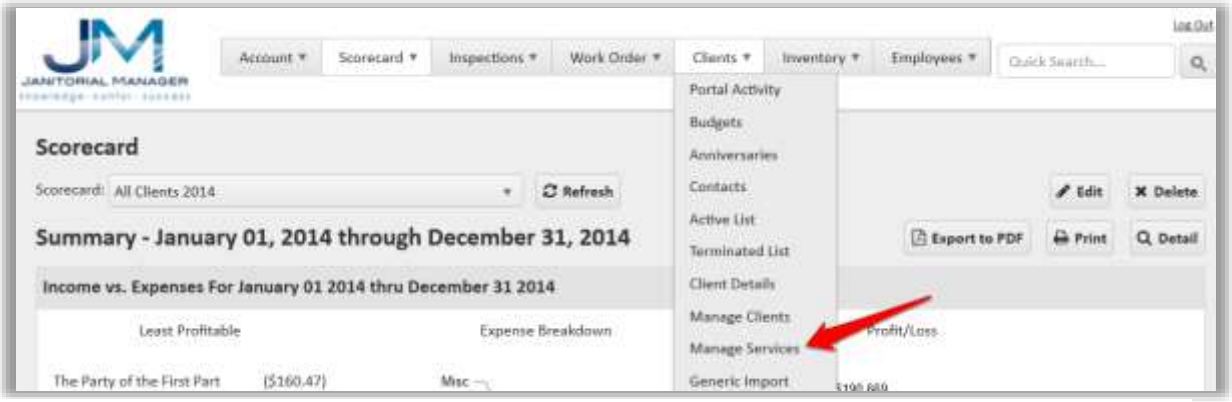


Figure 283

Locate the Service that requires a change and click the **Edit** button.

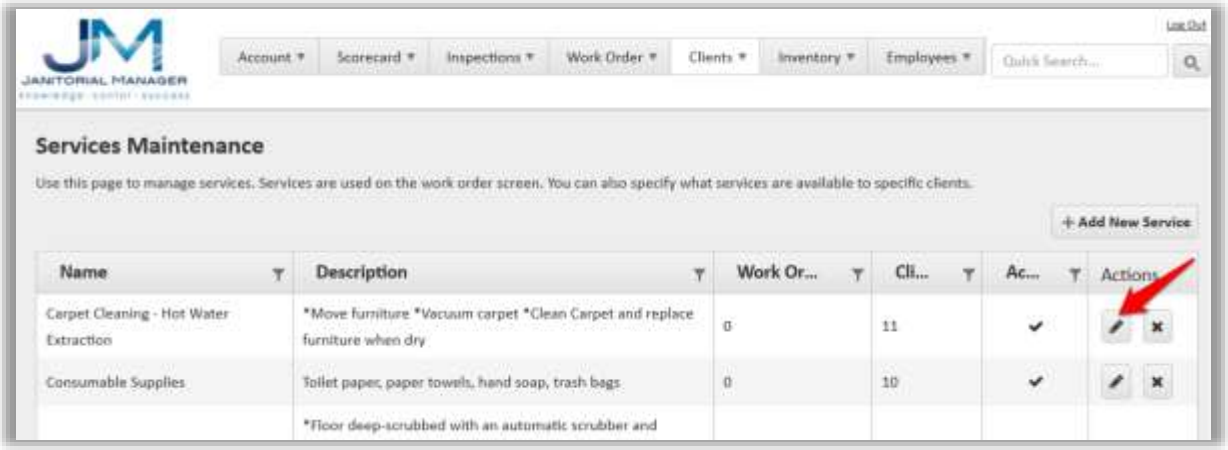


Figure 284

Make any necessary changes and click the **Save** button.

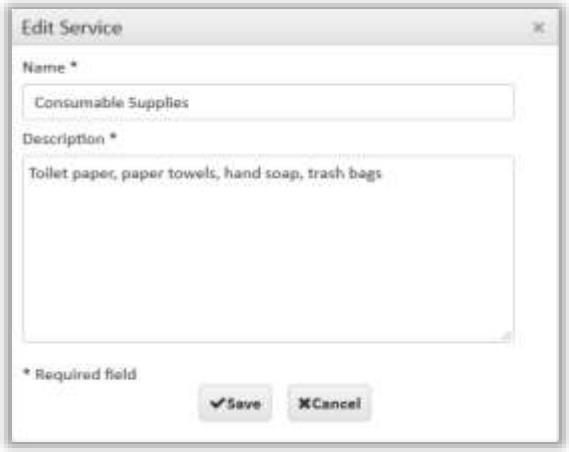


Figure 285

Delete a Service

To delete an existing Service, go to the **Clients** tab and **Manage Services.**

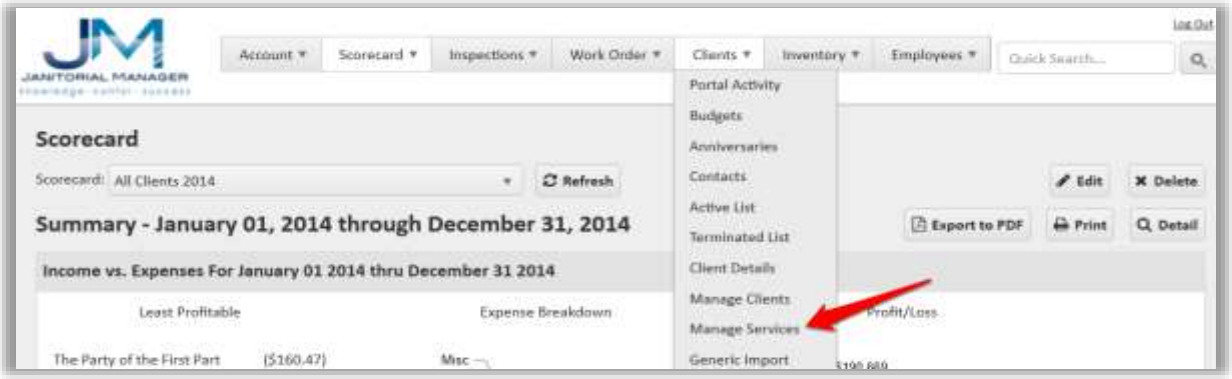


Figure 286

Locate the appropriate Service and click the **Delete** button.

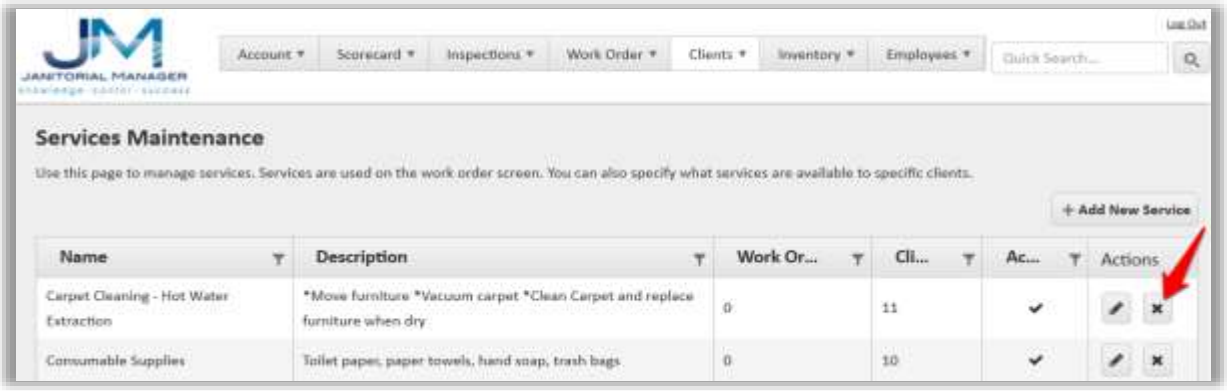


Figure 287

Assign Services to a Client

Services can be assigned to individual clients.

To assign Services to a Client. Select **Manage Clients** from the **Clients** tab.

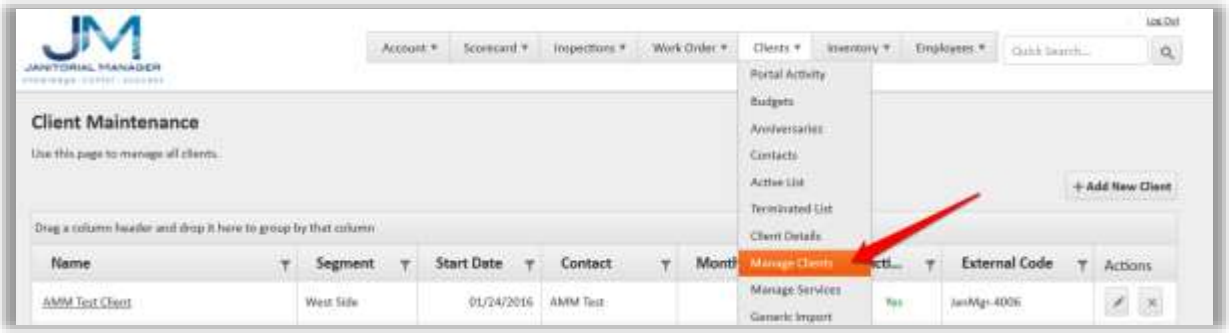


Figure 288

On the Client Maintenance page, click the **Edit** button for the desired Client.

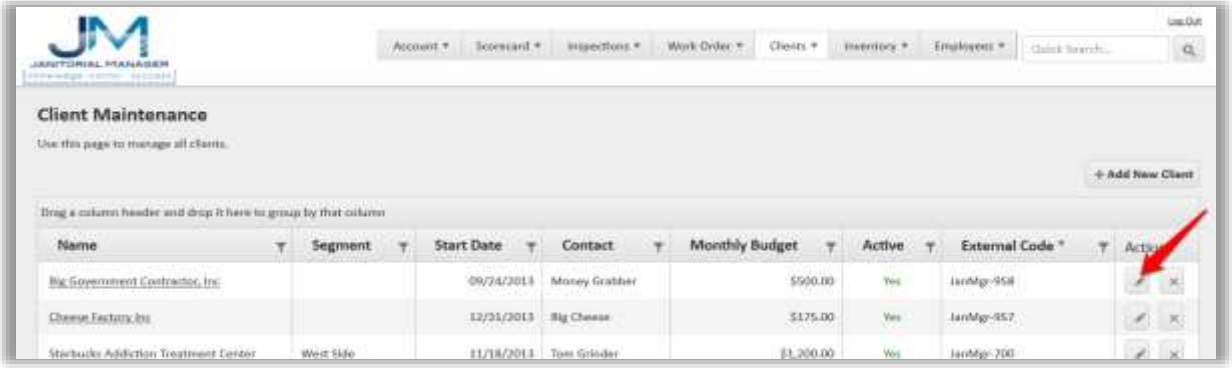


Figure 289

Click the **Services** tab.

Figure 290

On the Services page click the button to the left of each service that applies to the selected Client. The designation for the Service will change from **Not Provided** to **Provided.**

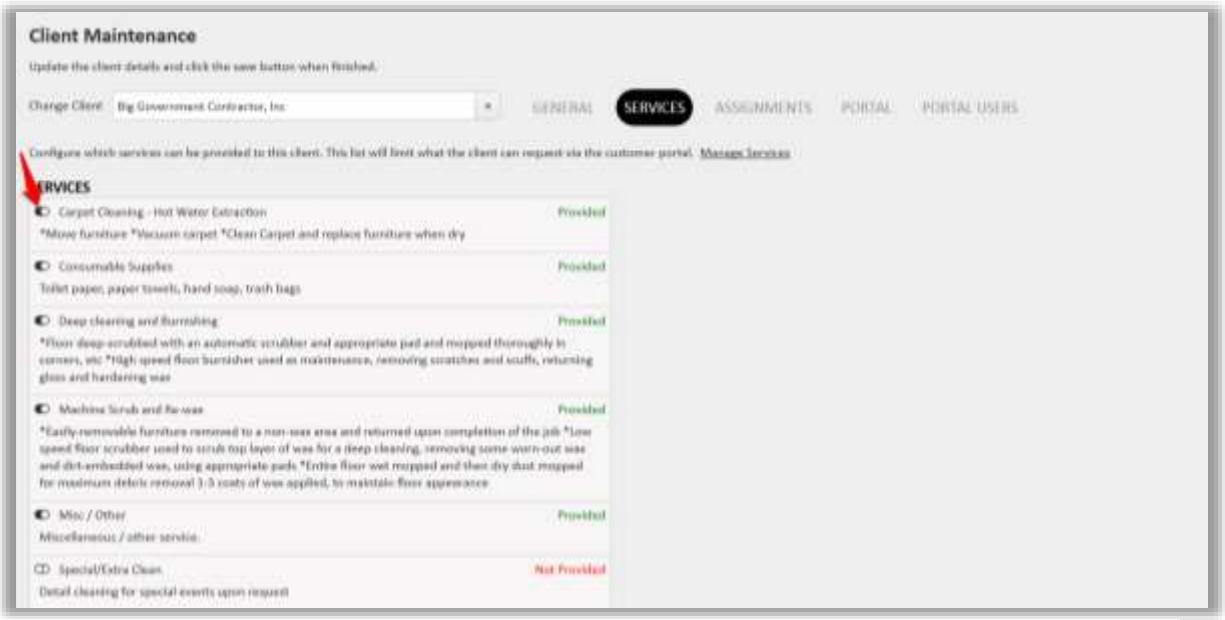


Figure 291

At various points throughout the system the Services that have been assigned to a client will be available. Services not assigned the Client will not appear.

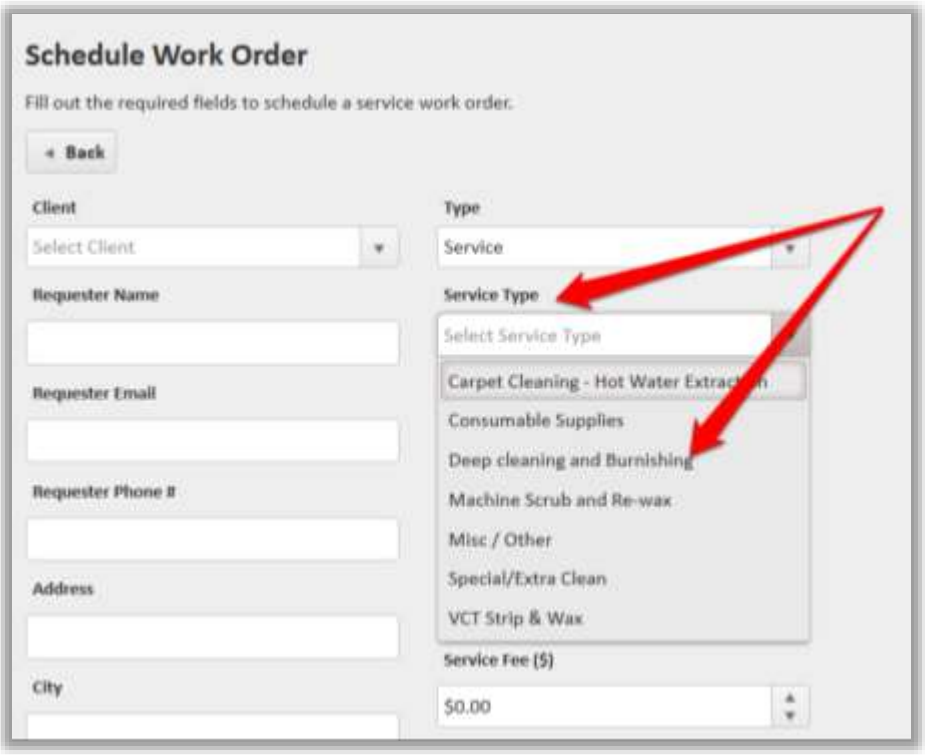


Figure 292

Client Portal

JM includes a Client Portal that can be activated optionally for each Client. The Portal allows Clients to submit requests and comments directly into the system. JM Users can receive system notifications, email or text for Portal submissions based on User settings.

Enable the Portal for a Client

To Enable the Portal for a Client, select **Manage Clients** from the **Clients** tab.

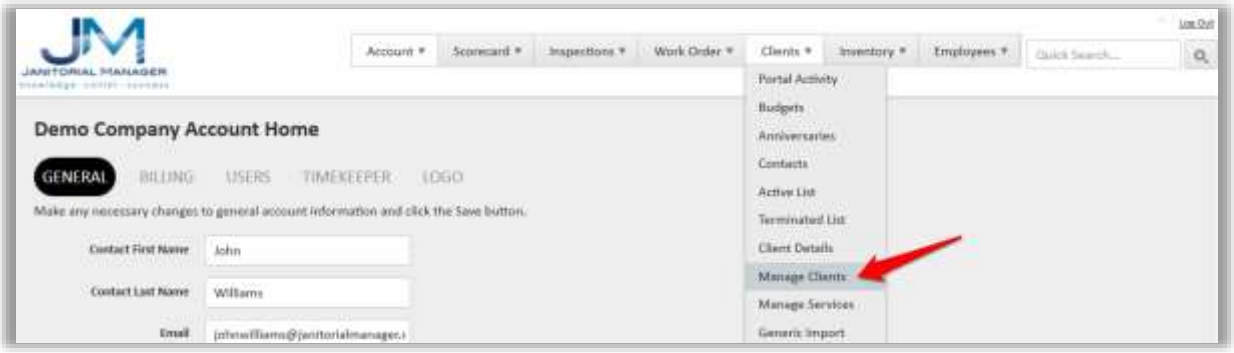


Figure 293

Locate the desired Client and click the **Edit** button in the actions column.

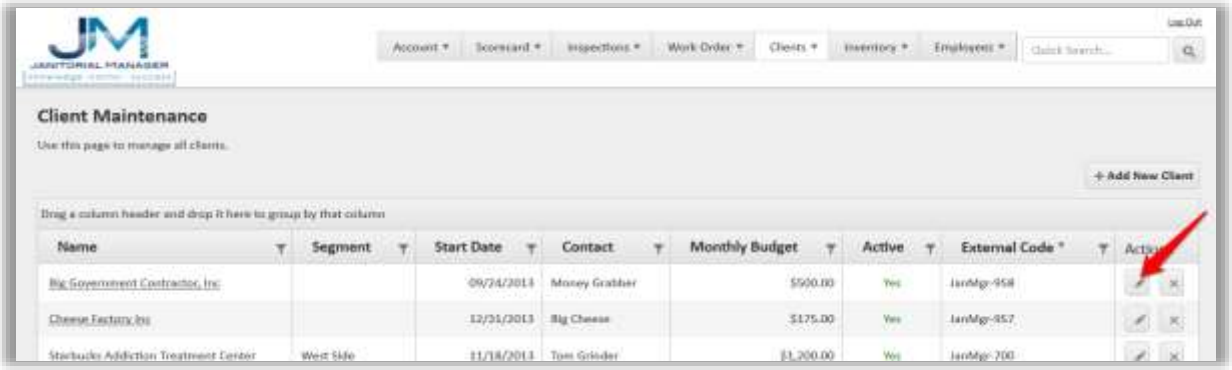


Figure 294

Click the **Portal** tab.

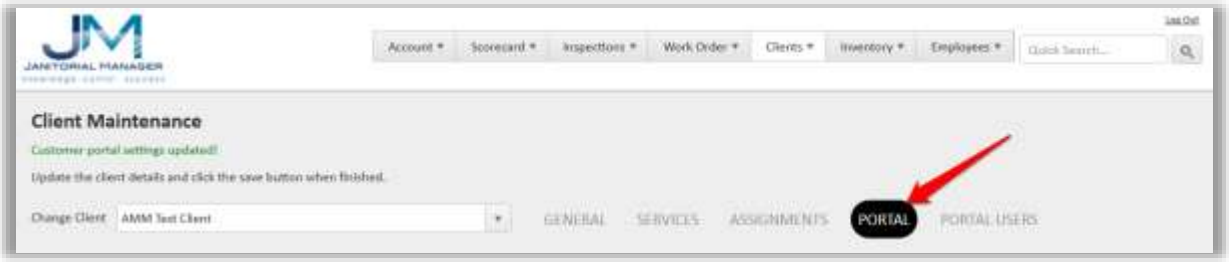


Figure 295

Click the **Enable Portal** button to enable the portal for the selected client.

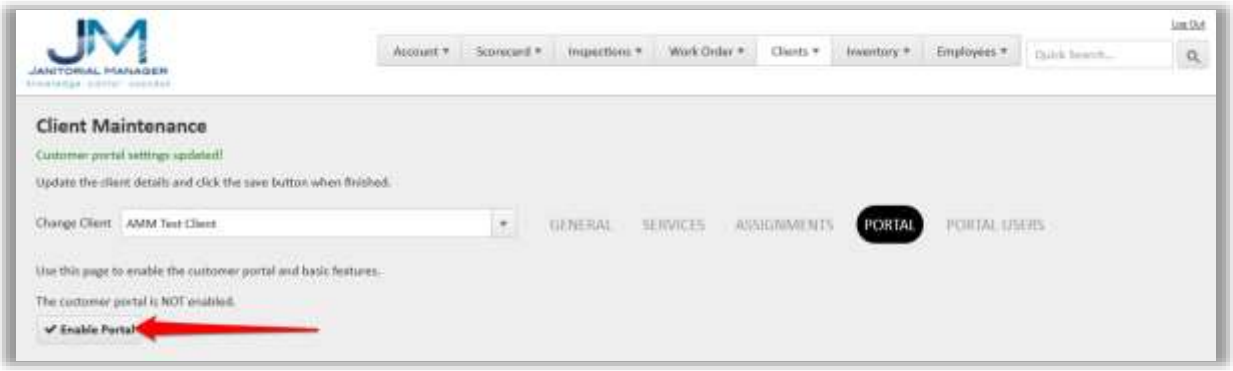


Figure 296

Click on the options you desire to enable for the selected Client. The options selected here will be available for the Client to utilize in the Portal.

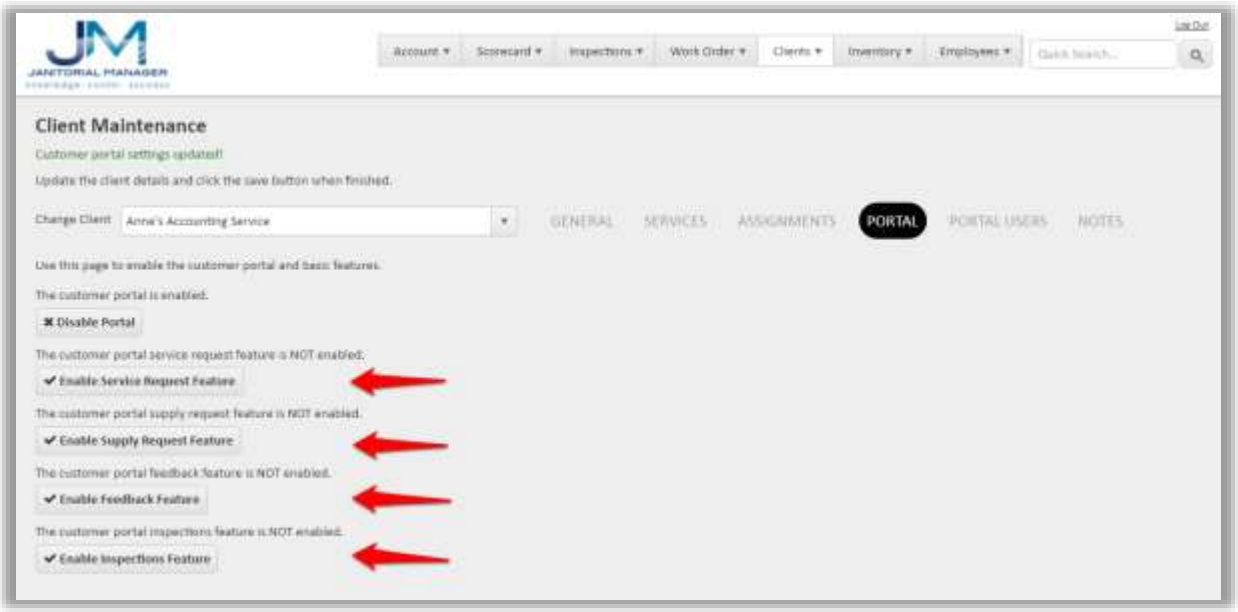


Figure 297

Enable or Disable Portal Options

To add or remove Portal options available to the client, select the Client tab and then Manage Clients. Locate the desired client and select the Edit button. On the Client Maintenance page for the desired client, select the Portal Tab. On the Portal tab activate or deactivate the desired portal options.

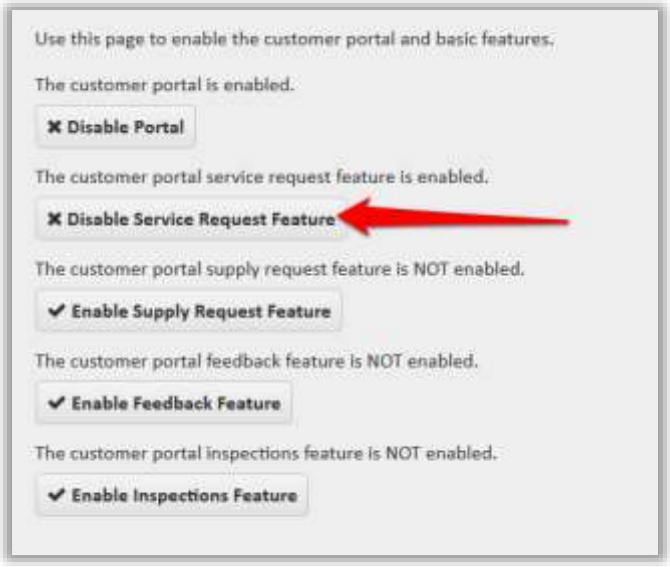


Figure 298

Portal Users

Portal users are Client side users. To manage Portal users, select the Client tab and then Manage Clients. Find the desired Client from the Client list and select the edit button. On the Client Maintenance page select the Portal User tab. See below.

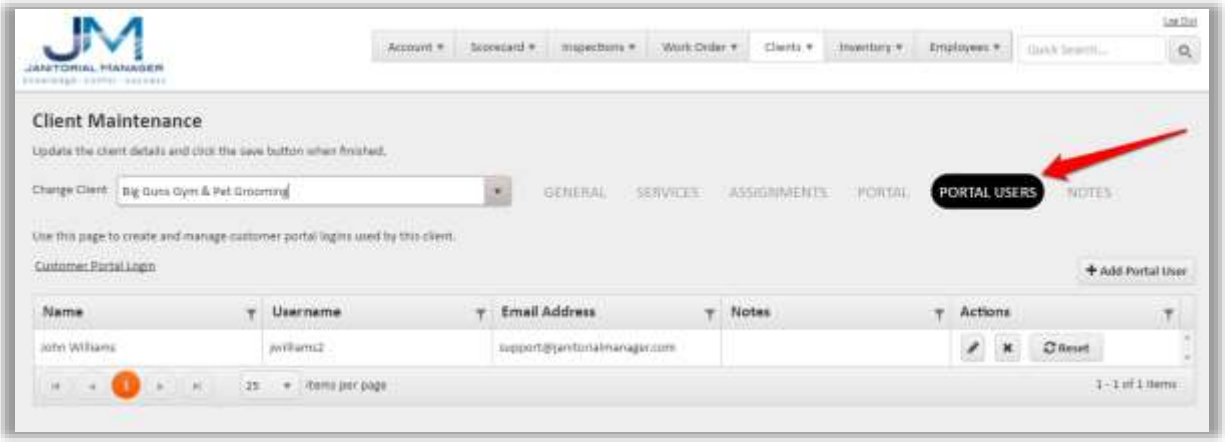


Figure 299

Add a New Portal User

To create a Portal user, select the Client tab and then Manage Clients. Find the desired Client from the Client list and select the edit button. On the Client Maintenance page select the Portal User tab and then select Add Portal User. See below.

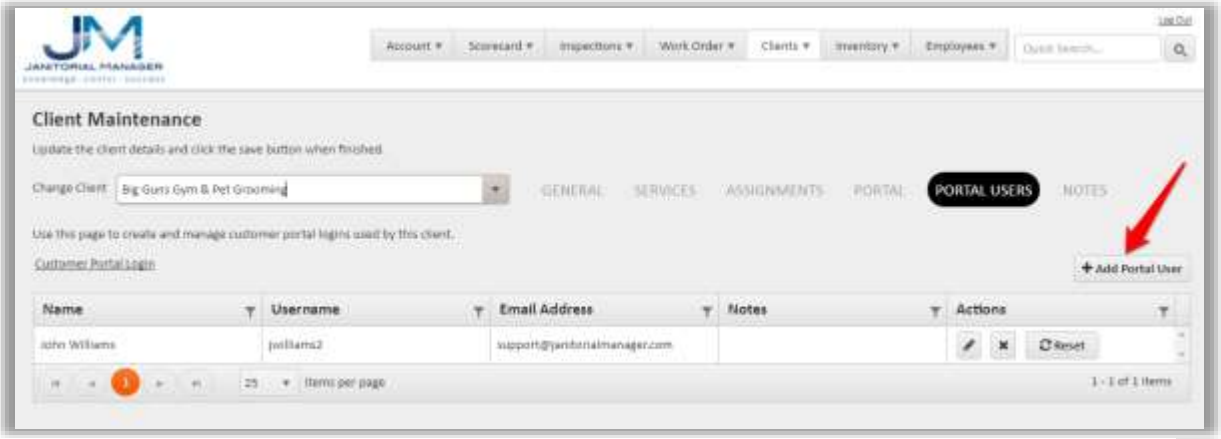


Figure 300

Complete the Portal User form and click Save. See below.

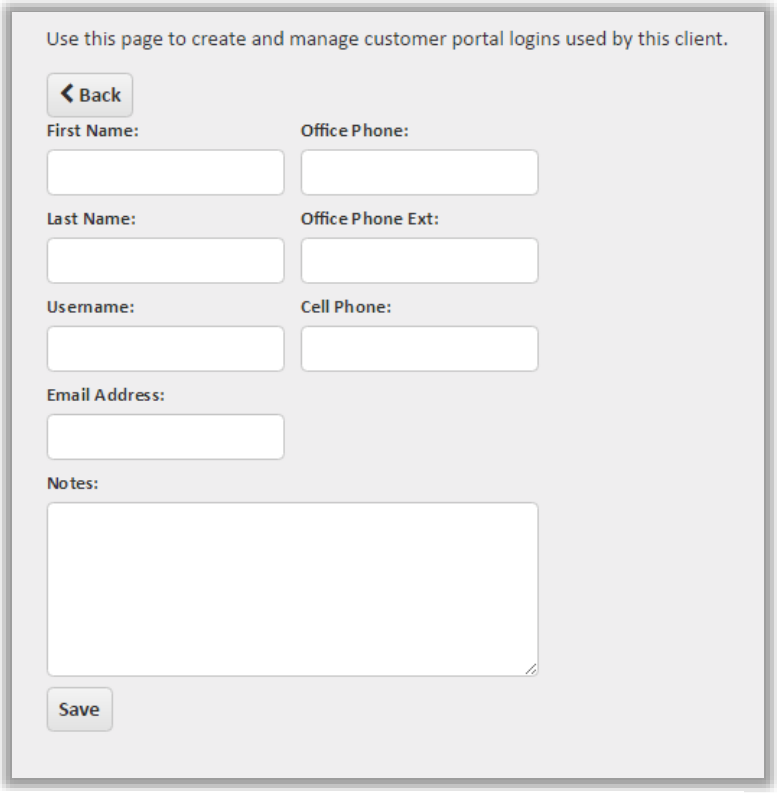


Figure 301

Edit Portal User

To edit a Portal user, select the Client tab and then Manage Clients. Find the desired Client from the Client list and select the edit button. On the Client Maintenance page select the Portal User tab and identify the desired user. Then select the edit button. See below.

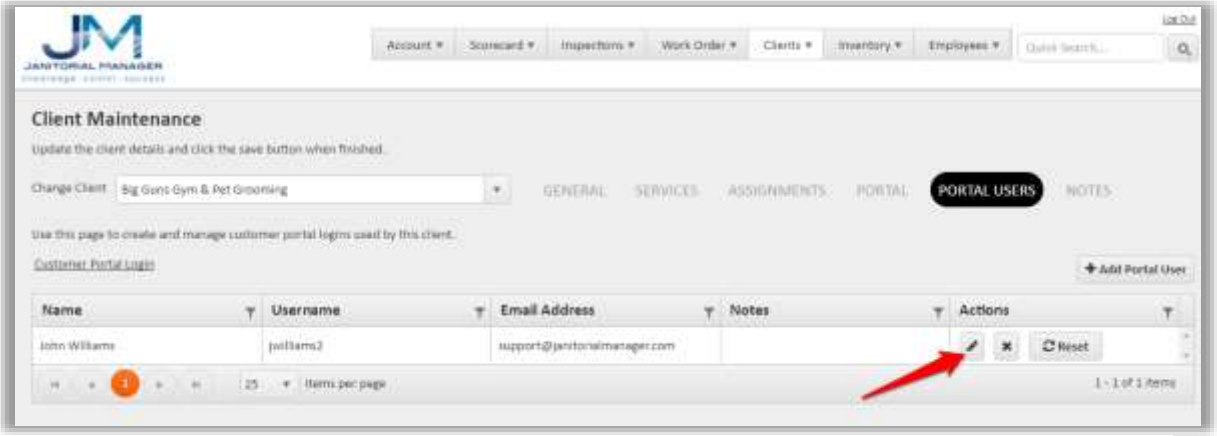


Figure 302

Make necessary edits and click the Save button.

Figure 303

Delete Portal User

To delete a Portal user, select the Client tab and then Manage Clients. Find the desired Client from the Client list and select the edit button. On the Client Maintenance page select the Portal User tab and identify the desired user. Then select the Delete button. See below

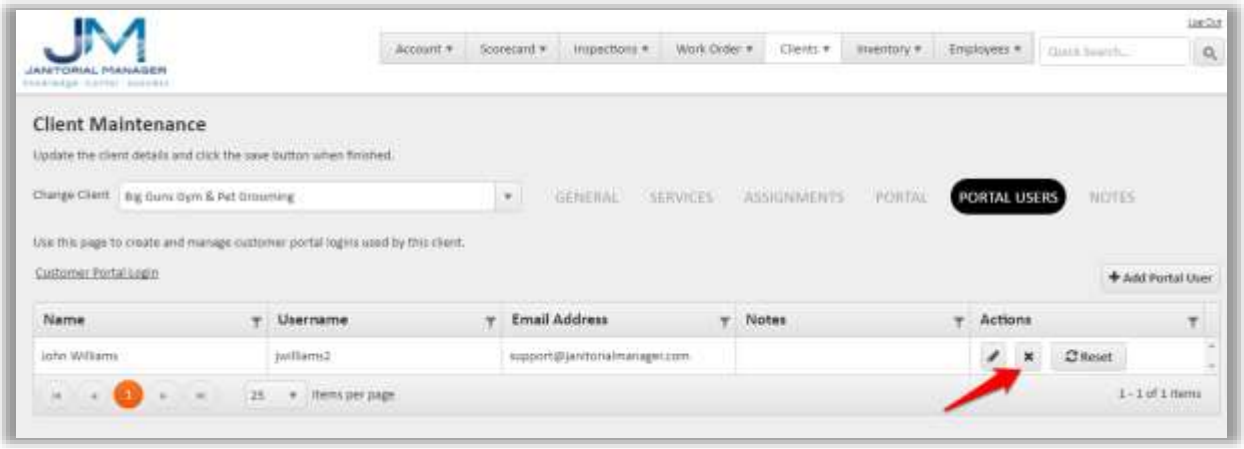


Figure 304

Reset Portal User Password

To reset a Portal user password, select the Client tab and then Manage Clients. Find the desired Client from the Client list and select the edit button. On the Client Maintenance page select the Portal User tab and identify the desired user. Then select the Reset button. See below

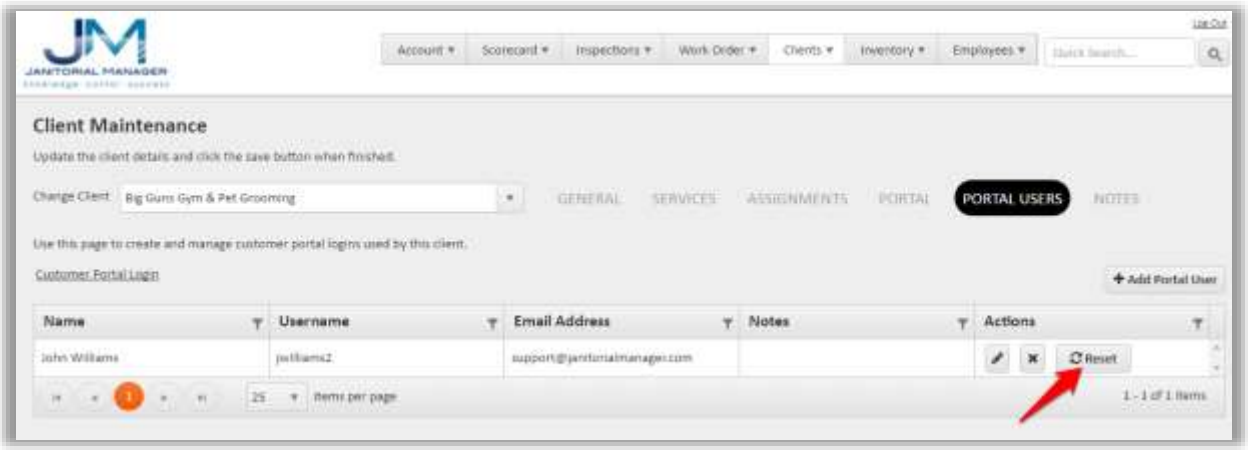


Figure 305

The user will receive an email with a temporary password and a link to login. Upon login, the user will be prompted to create a new password.

Assignments

Billing

Thank you! Your payment processed successfully and your account has been reinstated.