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	
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	
Enabling Timekeeper Features	
Scenario 1: Currently Using Both JM and Chronotek	
Employee Synchronization	
Client Synchronization	35
Scenario 2: Current Chronotek User, New to JM	
Employee Import from Chronotek	
Client Import from Chronotek	
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
N	lanage 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	
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	
Editing a Supply Inventory Item	
Deleting a Supply Inventory Item	
Add New Supply Usage	
Copying a Supply Usage Record	
Editing a Supply Usage Record	
Printing a Pick List	
Delete a Supply Usage Record	
Sorting Supply Usage Records	
Inspections	
Areas & Steps	
Create a New Inspection Template	
Schedule Recurring Inspections	
Edit Inspections	
Change Inspectors	
Set an Inspection Alert	
Conduct Inspections	
Review Inspections	
Segmentation	
Create a Segment	
Delete a Segment	
Add Clients to a Segment	
Remove a Client from a Segment	

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	

Initial Janitorial Manager implementation Checklist

- 1. Set up your company's account information <u>Go To Details...</u>
- 2. Set up your company's billing information <u>Go To Details...</u>
- 3. Set up your company's logo <u>Go To Details...</u>
- 4. Add users Go To Details...
- 5. **STOP!** If you are already a Chronotek user <u>Go Here...</u>
- 6. Add Clients <u>Go To Details...</u>
 - 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 <u>Go To Details...</u>
 - 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 <u>Go To Details...</u>

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.
 - o Company's billing information including credit card and billing address
 - Authorized user setup.
 - Timekeeper integration setup.
 - Logo setup.
- Manage Segments
 - o 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
 - o Details
 - Clients (Assigned)
 - \circ 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

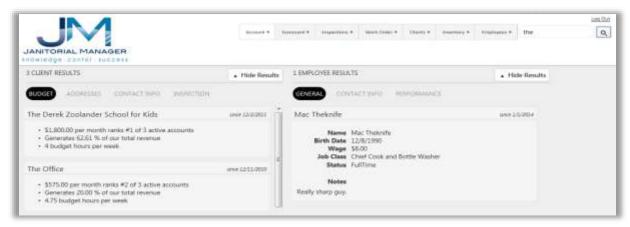


Figure 3

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.

Name @	Start Date in	Contact @	Monthly Budget @	Active	 Deactivation Date 	Acti	peis.	
ACML White late	15/03/2018	Jane Doe	\$1,403.00	Tes .		0		
Anne's Among and Jads Shop	10/11/2012	Anne Barris	100.00	Ves			9	
Big. Guns. Gym. A. Pet. Grooming	12/16/2011	Torus Pastforch	11.000	Wes.		0	8	
Good People Breing Company	6/16/2010	Ed Roch	\$900.00	Yes /				
Mathucks. Addiction, Englowers, Carther	01/9/2014	- the foundation	\$1,200.00	THE		9	(\mathbf{x})	
Summer: Carpet Changes		Matthew Wilhaim	\$600.00	745			8	
Tex, Danah, Zasala balar, Schurel, fan Xiela	3 12/01/2011	Darak Zoolandar	\$2,300.00	789		0		
The Office	32/10/2010	Michael Scott	\$775.00	Ves		0	×	
Timmy's Car Lat fourtheal	12/08/2010	Tim Spankarthemmar	\$775.00	Piler .	03/24/2014 11:25	0	6	6
Top Shelf Origing Schept	12/10/2011	Ted Mugeret	\$125.00	Ves.		0		

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.

Drag a column header and drop it here t	o gro	up by that colum	nn	
Name		Start Date	$\overline{\mathbf{v}}$	Contact
ACME Wholesale	-0	11/03/	2010	Jane Doe
Anne's Armory and Sub Shop		10/11/	2012	Anne Bon

The following form will be displayed.

4ame	Start Date Start Date	۲	Monthly Budget 🛞	Active	۲	Deactivation Date 🛞	Actio	ons
ACME Whoistale	Show items with value that:		\$1,465.00	Yes.			0	×
Anne's Annory and Sub Shop	Is equal to +		\$650.00	Yes			0	*
Big Guns Gum & Pet Grooming		Dieck	\$1,078.00	Ves			0	*
Good People Brewing Company	And +		\$906.00	Yes			0	8
Starbucks, Addiction, Tosatment, Cantar	Is equal to +		\$1,200.00	Yes			0	8
Sumhine Carpet Owners		libeirs	\$600.00	Ver			0	ж
The Denik Zoolandier School for Kide	Filter Clear	ender	\$2,308.00	Yes			0	×
The Office	12/10/2010 Micheal 5	cott.	\$775.00	Yes			0	1.

Figure 6

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

Is equal to	•
Is equal to	
Is not equal to	
Starts with	
Contains	
Does not contain	10
Ends with	

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 7

Show items with va	alue that:
Contains	•
the	
And •	
Is equal to	•
Filter	Clear



Click the Filter command

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.

Notice that only results "the" in the name are displayed.

			Account	19	retaid • Oreste •	10000	ery • 11 Ma	n agai	Treplayant +	Quint Search		0
lient Maintenance												
la this pays to managa all charts.											dd New	Cler
te this page to manage all charts. Drag a column bundle and drop it here i Name	e pou	e by that column Start Date	Contact		Monthly Budget		Active		Deactivation Da		dd New	
Trag a column bundler and drog it here t	u pia	Start Date	 Contact David Zuslander			® 00.003	Active		Deactivation Da			ms

Figure 9

Name	Start Date	Contact	t (9)	Monthly Budget 🛞	Active	۲	Deactivation Date	۲	Actio	bits
The Devel Zaslander School for Kids	Show items with value	that	Hander	\$2,330.00	Yes				0	×
The Office	Contains		out	\$775.00	Yes				0	8
a a 1 a a	the							3.	2:020	-
	And +									
	Is equal to	•								
	Filter Clea									

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.

JANITORIAL MANAGER	Account *	Scorecard ¥	Inspections *	Work Order *	Clients ¥	Inver
	Manage Acco					
Demo Company Account Home	Manage Segn	nents				
	Timekeeper E	rrors				

Figure 11

Select the General tab as shown below in Figure 12.

any Licenary chang	es to general account information and click the Save I	sutton.		
Contact First Name		Address	Some Street	
Contact Last Name	Williams	Address Une 7		
Email	MyEmail@email.com		SomeCity	
Phone Number	(123) 456-7890	State/Province		
Phone Extension		Ζiφ	12345-6	
fac		- Country	United States	

Figure 12

If you registered for Janitorial Manage via <u>www.JanitorialManager.com</u>, 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.

	Account *	Scorecard ¥	Inspections *	Work Order *	Clients ¥	Inven
deledge santar essant	Manage Accor					
Demo Company Account Home	Manage Segm	nents				
	Timekeeper E	rrors				

Figure 13

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

UNITORIAL MANAGER		Account *	Scorecard *	inspections •	Work Order •	Clerts *	investory *	Employees *	Quick Search	(
Demo Company Ac	count Home									
GENERAL BILLING		EEPEN to								
Make any necessary changes t	e your account billing int	tomation and cite	k the Save buttor	ý.						
Cardholder Red Name	Control for first New	e 1			Card Issa	er Photo	Cent Issuer (Marre			
Cardhalder Last Name	Gerthilder Last Naris					Address	uniting states on			
Cardfoolder Email	Caribuldio Estat				Billing Astor	ne litre 2	INTING Address Lin	(a)		
Card Type	Select Card Type				1.	Bing City	Balling City			
Card Number	Cart Number				tilling states	Provine	lelect blain in Fron	na 💌		
Expiration Month	Expration Month					illing Sp	Willing 21p Code			
Expiration Non	Expration Year				8884	Country	least Uting Court	w 💌		
CITUCVV2 Cede	CLD/DVV2 Code	-						@ save		

Figure 14

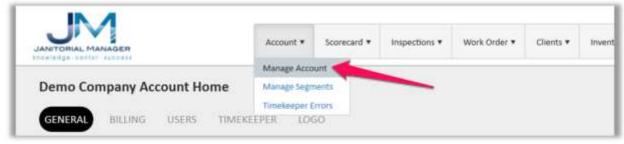
If you registered for Janitorial Manage via <u>www.JanitorialManager.com</u>, the General information page should be pre populated with information entered during registrations. Verify that all information is correct and click the **Save** button.

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.





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

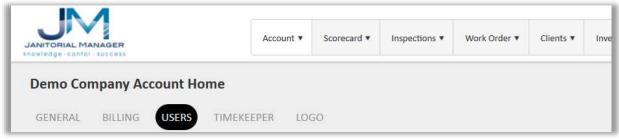


Figure 16

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

	1															Lim.5
UNITORIAL PA				Account +	Searchard + 1	unquection	16.7	Works	Order • Clients	•	Inventory *	Em	physics	•	Count Service	Q,
Demo Co		y Accoun	it Horr	ne												
GENERAL	801	aidi Ust	115	TIMEREEPER LOG	u)											
ise this god to	edit, del	ete and reset i	systems up	tern. To add a new steer, ch	ch the Add New Live	r button.										Add New Use
																non new Une
				oup by that column												add New Use
							Role	۲	Last Visit	۲	Active	۲	Actio	09.		Add New Uni
Drag a colum		r and drop it h	wre to ge	oup by that column		۲	Role	۲	Last Visit	۲	Active ×	۲	Actio	ns O	G Reset Passwo	ed
Drag a colum		r and drop it h User	wre to ge	tup by that column Email	Laam	۰ ۱	In the second	۲		۲		۲			© Reset Passwo	ed

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.

ANTORIAL MANAGER	Account *	Scorecard •	inspections *	Work Order •	Clients *	inventory 1
Demo Company Ad	count Home					
GENERAL BILLING	USERS	AERCEPEN.	1060			
Please fill out the new user fo All fields are required.	rm and slick the Save	button.				
First Name	first Name					
Last Name	Lant Name					
User Name	Distr Name					
Tonail Address	Drival (AvAdronia)					
There	Select Thereis					
	(8) Cancel	@ Save				

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 <u>support@janitorialmanager.com</u> as shown in 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... <u>go to details</u>

	JM
	JANITORIAL MANAGER
	cost . quality . people
	Your password has been reset by an administrator. For security purposes, please change your password.
•	The New password must have both upper and lower case letters, one digit and one special character.
	The New password must be at least 8 characters long. The new password and confirmation password do not match.
	Temporary password
	New password
	Password strength
	too short
	Confirm new password
	✓ Change Password

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.

I accept these terms and conditions	[?]	Continue to Janitorial Manager +	
JANITORIAL MANAGER TER	MS AND CONDITIONS	9	
"AGREEMENT") GOVERNING YOUR U (COLLECTIVELY, THE "SERVICE"). IF Y ENTITY, YOU REPRESENT THAT YOU WHICH CASE THE TERMS 'YOU' OR	ISE OF JANITORIAL MANAG OU ARE ENTERING INTO TH HAVE THE AUTHORITY TO E "YOUR" SHALL REFER TO SU	TO THE FOLLOWING TERMS AND CONDITIONS (THE ER ONLINE SERVICE, INCLUDING OFFLINE COMPONENTS S AGREEMENT ON BEHALE OF A COMPANY OR OTHER LEGAL IND SUCH ENTITY TO THESE TERMS AND CONDITIONS, IN CH ENTITY, IF YOU DO NOT THASE SUCH AUTHORITY, OR IF YOU ST SELECT THE "I DECLINE" BUTTON AND MAY NOT USE THE	
WELCOME			
		e of the Service, including a browser interface and data = or use of the Service shall be deemed to be visur accessed to	



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

NETORIAL MANAGER	Account +	Scorecard •	inspections •	Work Order •	Clients •	
Demo Company A	ccount Home					
GENEIGAL BILLING	USERS 714	ALILEPUN.	1000			
Please fill out the new user fo All fields are required.	rm and click the Sove	battan.				
find have	Avel Name					
Last Norw	List there					
User Name	And Name					
Consil Address	Email Address					
theme	princt theme					
	Bootstrap					
	Default Silver Uniform					
		- 1				

Figure 22

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

Bootstrap Theme



Figure 23

Default Theme



Silver Theme



Figure 25

Uniform Theme



Figure 26

Flat Theme



User Roles & Rights

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

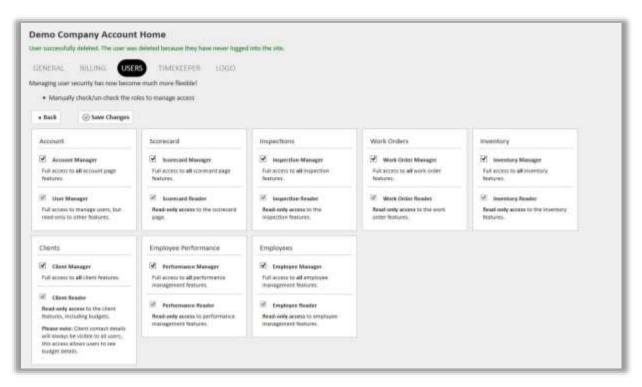
													_			Log
			Account *	Scorecard ¥	Inspectio	ons 🔻 🛛 W	ork Order 🔻	Clients 🔻	In	ventory ¥	Emp	oloyees 1	•	Quick Sear	rch	٩
)emo Compa	ny Accour	nt Hom	e													
GENERAL BIL	LING US	ERS T	IMEKEEPER LOC	50												
	elete and reset	system use	ers. To add a new user, cl	ick the Add New L	User button.	21									⊕Add	New Us
				ick the Add New U	User button.										⊕Add	New Use
se this grid to edit, d	ler and drop it I			ick the Add New L			ন্ট Last V	ïsit	Ŧ	Active	Ŧ	Actio		/	⊕Add	New Use

Figure 28

Select the Security tab under the user information.

GENERAL	BILLING	USERS	TIMEREER	eer n	logo
CERTRE PORT	BULLINEG	USERS	THMESLEEP	tu.	uodu
Make the neces All fields are rec		to this user and	I dick the Save	button.	
	First Name	Demo			
	Last Name	User			
	User Name	demouser			
0	mail Address	demo⊜dem	o.com		
	Theme	Bootstrap			

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



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.

ANITORIAL MANAGER	Account 🔻	Scorecard •	Inspections *	Work Order 🔻	Clients •	Inv
Demo Company Accou	nt Home					

Figure 31

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

			Account •	Scormand •	Anspection	ans • 1	Nork Order •	Clients	ŝ.	investory +	ding	layees	Ouick Search	٩
Demo Compan	y Account	Hom	ne 🥢											
	10000000	1												
Armiral and			TRAFFFEREN INTE											
GENERAL BILL			TIMEREEPER LOG		ter button.									
			TUMERCEPER LOG		ser button.	2							⊛A4	d New Us
	lete and reset of	ystem us	ers. To add a new user, cho		ser button.	2							⊛A4	d New Us
use this grid to edit, de	lete and reset of	ystem us	ers. To add a new user, cho		er button.	Role	East	/isit	۲	Active	۲	Action	⊛A4	d New Us

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.

													Log O
		Account *	Scorecard ¥	Inspections	• Work	Order •	Clients 🔻	Inventory ¥	Em	ployees 1	•	Quick Search	٩
Demo Compa	ny Account Ho	ome											
			2.21										
GENERAL BI	LING USERS	TIMEKEEPER LOO	60										
	-	TIMEKEEPER LOO		ser button.								€A	dd New Use
Use this grid to edit, o	Belete and reset system			iser button.								€A	dd New Use
Use this grid to edit, o	delete and reset system	n users. To add a new user, cl			ole 🕤	Last Visit	t G	Active	Ŧ	Actio		€A	dd New Use

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

									Dependences.	
IANITORIAL MANAGER		Account ¥	Scorecard *	Inspections *	Work Order *	Clients *	Inventory *	Employees *	Quick Search	
Demo Company A	count Home									
GENERAL BILLING	USERS TIMEK	EEPER LOO	50							
Make the necessary changes All fields are required.	to this user and click the S	ave button.								
First Name	Beth									
Last Name	Chambers									
User Name	Beth									
Email Address	beth@chronotek.net									
Theme	Default									

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.

JM	Account *	Scorecard ¥	Inspections ¥	Work Order *	Clients *	Inventory *	Employees *	, Quic	k Search	LOEJ
JARTORIAL MANAGER	Manage Acco	unt								
Scorecard	Manage Segn									
Scorecard: All Clients 2014	Timekeeper E	w wefresh						🖋 Edit	× Delete	
Summary - January 01, 2014	through Decemb	er 31, 201	1			(A) E	xport to PDF	🕀 Print	Q, Detail	
Income vs. Expenses For January 01	2014 thru December 31	2014								
re 35										

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

NATORIAL ST				Account *	Scorecard •	inspection 2010	uns *	Work Order +	Clients *	entory +	Employe	es *	Guick Search	
Demo Coi	mpan	v Accour	ut Horr	-										
		,	-											
				Contraction of the second s										
	8411			TIMEREEPER LO										
				TEMEREEPER DO		User bytton	2						۲	Add New U
	edit, dei	ete and reset	system us	sers. To add a new user, o		User button.	2						۲	Add New U
se they good to	edit, dei	ete and reset	system us			User button	2						۲	Add New U
se they good to	edit, dei	ete and reset	system us	sers. To add a new user, o		User bytton	Role	⊛ Last \	/wit (Active	Act	iona	۲	Add New U

Figure 36

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

JM				Account			* and:	Wirk Ord	fer • Client		inventory *	stayves •	Outh beach.	٩
Demo Compa	iny	Accoun	t Hon	ne										
		_			Constant C									
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GENERAL 00. ne this grid to edit, d	teleti					ew Oser butb							⊕A4	d New Use
GENERAL 00	teleta	e and reset	iydem u			ew User Burth							⊕A4	d New Ove
GENERAL 00	teleta	e and reset	iydem u	ners. To add a new un		ew User turts	Role		Last Visit	٠	Active	Actions		d Now Dee

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.

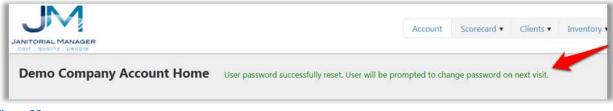


Figure 38

The user whose password was reset will receive an email from <u>support@janitorialmanager.com</u> 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... <u>go to details</u>

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.

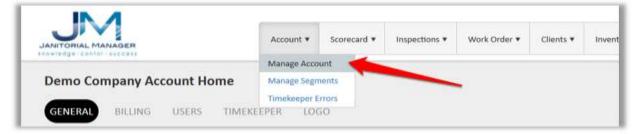


Figure 40

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

				Account •	Scormand •	Anspect	tions +	Work	Order • 0	lients *	Investory	• 6	nphayees	٠	Guick Search	٩
Demo Comp	an	Accour	nt Hon	ne												
			1													
GENERAL B		nial (us	ERS	TIMEREPER LOC	660											
						User bytto	n.)								(2.44	d New Usa
						User butto	•								@A6	d New Us
use this grid to edit.	, dek	na and reset	system u			User butto	n.								@A6	d New Us
use this grid to edit.	, dek	na and reset	system u	sers. To add a new user, ch		User butto	n. Role	۲	Last Visit	æ	Activ		Actio	na	@A6	d New Use

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.

l	Mike Someone	Mike Someone	Mile.Someone@email.com	Adminüser	01/17/2014 18:43	0	0 ×
---	--------------	--------------	------------------------	-----------	------------------	---	-----

Figure 42

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

	Mike Someone	Mike.Someone@email.com	AdminUser	Bootstrap	01/17/2014 18:43	\times	\odot	C
John Doe	johndoe	gregchasteen@janitorialmanager.com	BasicUser	Default	02/12/2014 18:55	×	0	¢

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.

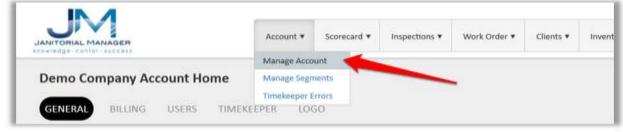


Figure 44

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

			Account •	Scorecard • Any	ections •	Work 0	oder • Clev	5*	inventory •	800	ployees •	Gaith Starth -	٩
Demo Compa	ny Accoun	t Hor	ne										
		1 A 1											
GENERAL BU	LING USE	RS	TIMEREEPER LOC	10									
			TUMEREEPER LOC		tion.							(BA)	of New Use
					tion.							⊕A4	ld New Us
Use this grid to edit, o	whete and reset i	iystem us			tton.							⊛A4	ld New Us
Use this grid to edit, o	whete and reset i	iystem us	vers. To add a new user, ch		ntoo.	۲	Last Visit	۲	Active	۲	Action		M New Use

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 \boxtimes . The \boxtimes entry is the indication that the user has been previously deleted/inactivated. The \boxdot entry indicates that the user is currently active in the JM application.

	Mike Someone	Mike.Someone@email.com	AdminUser	Bootstrap	01/17/2014 18:43	×	\odot	c	
John Doe	johndoe	gregchasteen@janitorialmanager.com	BasicUser	Default	02/12/2014 18:55	×	0	c	

	Mike Someone	Mike.Someone@email.com	AdminUser	Bootstrap	01/17/2014 18:43	×	\odot	C	
John Doe	johndoe	gregchasteen@janitorialmanager.com	BasicUser	Default	02/12/2014 18:55	×	0	c	

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.



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.

ANTONIAL MANAGER	Account *			- marked and a second	0.000			Overst Senarch	0
		Scorecard *	Inspections •	Work Order *	Clients *	Inventory *	Employees *		- 1.2
Demo Company Account									
rento company recount									
GENERAL BILLING USER	RS TIMEREPPER LOC			_					
	upper left corner of the web page								

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.





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

	Account •	Solecard •	implections •	Work Order •	clients •	inventory •	Employees •	Guild Barch	Q
Demo Company Account H	lome								
	17.1.1.E								
Andrews Patrane Concerns									
hange the picture that appears in the	apper left conter of the we								
Trange the picture that appears in the	apper left const of the we								Done
GENERAL BILLING USERS Change the picture that appears in the Select files	apper left const of the we								Done (

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

- 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.

	Account •	Scorecard ¥	Inspections *	Work Order 🔻	Clients v	Invent
	Manage Acco	ount				
Demo Company Account Home	Manage Segr			-		
GENERAL BILLING USERS TIMEKI	EEPER LOO	GO				

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.

IN A										3,085
MUTORIAL MANADER		Account •	Scorecard •	Impections +	Wark Order *	Clients.*	Intentory *	Employees *	Qualitienth	٩
Demo Company Ad	count Home									
GENERAL WILLING	USERS TIME	REEPER U.S	50							
lake any recensery changes	to the timekeeper inform	sation and click the	Save Buffors.							
Vanakarper Nysteini	Chronotek		-							
Reference Number	Julyrance komber			~						
Index	Synced									
	× Gear	@ 5ave								

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.

JM				Account •	Score	card • Insp	pections *	Work	Order	• Gients •	Inventory	• Employees •	CLURK S	keirti	Q
Employee Ma														⊕adi	New Employee
ise this page to man	ageare	opoyees.													
Drag a column hea	aller and	drop it here to group	p by the	et column											
Drag a column hea	ater and	drop it here to group Emp. Status	p by the	it column Job	۲	# Clients	۲	Active	•	Deactivation I	Date	External Co	ide @	Actio	ms
	۲				۲	# Clients 2	۲	Active Yes	۲	Deactivation (Date	External Co JarMgr-1131	ide ල	Actio	ms X

- 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

	View:	show: Active (Daly Y Search:	-	Basic Setup Per	sonal Info	Advanced	Mobile Access	Notes	
	1.1810.00	Access Code	1098800.55	Status						*****
Dashboard	1000		Bono, Sonny	out	A Caution: These a	dvanced set	tings are provid	led to handle spe	cial-case scenarios. Please cont	act Chronotel
List Maintenance	1000		Coktostin, John	out	Supervisor Alerts	All Cher	k-Ins 🗍 All	Check-Outs		
	 1000		Employee, Ellen J.	out				citeen eats		
Zones	1000		Fletcher, Fletch	out	Random Voice	Disabled (default) 🔻			
Employees	 1000	162484	Hope, Bob	out	Verification	(1111)				
Jobs	1000	162270	Huxtable, Theodore	out	Name Recording	Reset				
C. S. Carlos	1000	162878	Malone, Sam	out	Auto Safeguard	Timecard F	Reset after Hours			
Phones	1000	162009	Presley, Jamie	out	for Missed	1.0.00000000000000000000000000000000000				
Activity Codes	1000	162075	Smith, Timmy	out	Clock-Outs	Reset Times	ard after 16	hours		
	1000	162193	Stipes, Michael	out		• This is a s	afeguard feature	for employees		
Payroll Functions	1000	162345	Supervisor, Sally	out		who forge	t to clock out.			
Payron Functions	 1000	162996	Szyslak, Moe	out		 The best is employee. 	etting is 4+ hours is normal shift.	rs longer than		
Snapshot Settings	1000	162027	Theknife, Mac	out		· An employ	ee CANNOT cloc	k out after this		
and hourses	1000		Turner, Tina	out		length of t		d to be edited to		
Scheduling	1000		User, Demo	out		reflect act	ual time worked.	d to be earted to		
	1000	162555	Williams, John	out	1.1					
Communications							-			
Reports					External Code 1	JanMgr-866		-		
	 				External Code 2					
Auditing					10000000000000000000000000000000000000				-	
My Account					-				62000	0200000
									Save	Cancel

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.

	TEK ne Tracking						
			show: A	II 🗸	Search:		a 🔎
Dashboard	-	Zone	Access C	Name	Status	М	
DashDoaru		1000	162148	Blooth, Franklin	termi		
List Maintenance		1000	162533	Blooth, Franklin	termi		
Zones		1000	162820	Blooth, Franklin	out		
	-	1000	162716	Bono, Sonny	out		
Employees	_	1000	162161	Coktostin, John	out		
Jobs		1000	162796	Cooper, Alice	out		
Dhamaa		1000	162162	Employee, Ellen J.	out	Π	

Log Out Quick Search... 0 Account * Scorecard • Inspections * Work Order 🔻 Clients • Inventory * Employees * Tracking Performance Reviews Anniversaries ٠ C Refresh Birthdays hrough December 31, 2014 Active List AE Terminated List 14 thru December 31 2014 **Employee Details** Manage Employees Expense Breakdown Profit/Loss \$250,000 Manage Performance Dimensions Add. Svcs. Misc \$190,669 Manage Job Classifications \$200,000 Labor Managers \$150 000 \$118,577 Insurance Generic Import \$100,000 \$72.093 Chronotek Import \$50,000

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

- 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
 - 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
 - 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.

	Aco	ount ¥	Scorecard	d 🕶 Insper	ctions	Work Orde	r •	Clients ¥	Inventory 1	Emplo	yees 🔻	Quick Sear	rch		Q
Client Maintenance													⊕Add N	New Cl	ient
Drag a column header and drop		roup by tha	t column											-	1
														-	
Name	۲	Segm	. 🐨	Start D	۲	Contact	۲	Monthly	Bud 🕤	Ac	•	External C	1	Action	15
Name AMM Test Client	۲	Segm General	. 🐨	Start D		Contact AMM Test	۲	Monthly	Bud 🕤	Ac Yes		External C		Action	ns ×
	۲		• •		2016		۲	Monthly			Jai				

- 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

		View:	ctive	• Search:						
		Avenue 1	ctive	Search	-	Basic Setup	renced L	ocation	Notes	
Dashboard		Zone	Job Code	Job Name	Location	A use this page to	store inform	ation about	t your lobs.	Required fields are labeled with an asterisk (*) all other
Dashboard		1000	8888	AMM Test Client		are optional.			9.6330.620.00	
List Maintenance		1000	9886	Anne's Accounting Service		, as a op overeas				
	- 2	1000				External Code 1	JanMgr-126	62		
Zones		1000	8375	Big Government Contractor				200		
Employees		1000	6389	Big Guns Gym & Pet Groom		External Code 2				
Jobs	-	1000	8914	Big Joe's Auto Sales		External Code 3	1			
Margaret		1000	5476	Cheese Factory Inc			0.00			
Phones		1000	5975	Dr. Freudenburger's Mobile		Budgeted Hours	0.00			
Activity Codes		1000	9695	Eds						
		1000	9230	Good People Brewing Comp		Service Item	- Mana Ca	ecified > •		
Payroll Functions		1000	7012	Jane's Cakes		Service Item	Contract of the second second			
rayron runcuons		1000	1212	JM Tech Support		Pay Type	< None Sp	ecified > *	3	
Snapshot Settings		1000	2769	Starbucks Addiction Treatm						
		1000	3242	Sunshine Carpet Cleaners		-			-	
Scheduling		1000	5750	The ACME Wholesale					Save	Cancel
122302000000000		1000	3483	The Derek Zoolander Scho						and the second s
Communications		1000-	33.4.4	The offers						

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.

	DTEK						
			show: Al	I v	Search:		a 🔎
Dashboard		Zone	Access C	Name	Status	М	
Dashboard	•	1000	162148	Blooth, Franklin	termi		
List Maintenance		1000	162533	Blooth, Franklin	termi		
Zones		1000	162820	Blooth, Franklin	out		
	_	1000	162716	Bono, Sonny	out		
Employees		1000	162161	Coktostin, John	out		
Jobs		1000	162796	Cooper, Alice	out		
Dharman		1000	162162	Employee, Ellen J.	out	Π	

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

JM	Account * Scorece	ni • impections •	Work Order +	Clerifs + Insert		•	i Search	a,
Scorecard Scorecard: All Clients 2014 Summary - January 01, 2014 throu Income vs. Expenses For January 01 2014 thr				Hortat Activity Budgets Antiversaries Contacts Active Lut Terminated Lut Clevit Dotats	C Export to POF	≠ tdR ⊕ Print	H Detete Q, Detail	
izant Profitable The Party of the First Part (\$180.47) iane's Colors \$271.52	Expense Break	lówn Latter	5250.000 5200.000 \$780 5150.000	Manage Classis Manage Services Centers Import Dimmentel Import 1115.577	-	_	-	

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
 - 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.

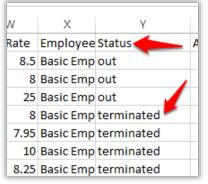
Employee Import from Chronotek

- 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

	TEK ne Tracking						
			show: Al	I 🗸	Search:		a 💫
Dashboard		Zone	Access C	Name	Status	М	
Dashboard		1000	162148	Blooth, Franklin	termi		
List Maintenance		1000	162533	Blooth, Franklin	termi		
Zones		1000	162820	Blooth, Franklin	out		
	-	1000	162716	Bono, Sonny	out		
Employees	_	1000	162161	Coktostin, John	out		
Jobs		1000	162796	Cooper, Alice	out		
Dhamaa		1000	162162	Employee, Ellen J.	out	Π	

Figure 63

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



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

M	C 1				_			111		LAKS
ANTORIAL MARCAGER	Account *	Scorepart +	impectors *	Work Orde	e.	Olerfs . Invert	tory . Employee	Gen Gen	i feeth	٩,
senange vients wereast						Portal Activity				
Scorecard						Budgets				
Scorecurd: All Clients 2014		C Refresh				Anniversation .		/ 5d8	* Delete	
Contraction Provision avoid		C NEWTON				Dortarts.		P FOR	e oren	
Summary - January 01, 20)14 through Decemb	er 31, 2014				Active Live	C Export to PDF	🖶 Print	Q, tivital	
						Terminated Ltd				
Income vs. Expenses For January	01 2014 thru December 51	2014				Elsevit Dietails				
Least Profitable	Expe	nur Breakdown.				Manage Clarity				
The Party of the First Part (\$160				\$250,000		Manage Services				
				\$209,000	+90.6	Generic Import	4			
	L92		- Later	\$150,000		Chronatak impart	-	-		

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

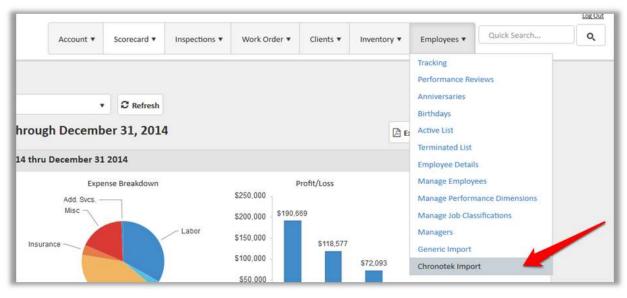
- 1. Login to Chronotek
- 2. Go to List Maintenance -> Jobs
- 3. Click the excel icon to download job list to your computer hard drive

		View:	Active	۲	Search:		-
Dashboard	T	Zone	Job Code	Job N	ame	Location	
ISHDOalu		1000	8888	AMM T	fest Client		
st Maintenance		1000	9886	Anne's	s Accounting Service		
shboard st Maintenance ones		1000	1234	Bank	of America		
Lones		1000	8375	Big Go	overnment Contractor		
Employees		1000	6389	Big Gu	uns Gym & Pet Groom		
obs	-	1000	8914	Big Jo	e's Auto Sales		
2		1000	5476	Chees	e Factory Inc		
Phones		1000	5975	Dr. Fre	eudenburger's Mobile		
Activity Codes		1000	9695	Eds			
		1000	9230	Good	People Brewing Comp		
		1000	7012	lane's	Cakes		1

Figure 66

4. Log into Janitorial Manager

5. Go to Clients -> Chronotek Import



- 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.** <u>Once they have confirmed your participation</u> 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.

		Account •	Scorecard +	inspections +	Work Order •	Clients *	inventory +	Employees *	Quint Search	Q
emo Company A	count Home									
SENERAL BRUINE	Alsens TIMER	EEPER 10	sõ							
ake any necessary changes	to the timelesper inform									
Timekeeper Nettern	Chrunatek.	(*)								
Reference Number	Justemas Namber									
506m	Synced									
		Save								

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.

				Account +	Scirecant •	Inspections *	Work Onler •	Clents.*	Inventory •	Employees •	Gank beach	0
Fimekeeper	Errors	vs associated with	s the time		eerdta 🚽	_						
02/10/2016		(Q/17/2016		& Refresh								
						۲	Message			Actions		e

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.

				Account •	Scorecard •	inspections •	Work Order •	Clients •	inventory *	Employees •	Quité Search	Q.
Timekeeper Er the this page to mana that the 02/10/2016 Error Type	TOP:		the time	ckeeper teetts. © Refresh Date			Message	Burtal Activit Burtgers Annoemanie Contacts Active List Terminated		Artista		
Error Type				Date		(e)	Message	Chert Detail		Actions		۲
a a 💽 a		25 .*	(tentro)e	1.2-001				Manage Cla Manage Ser Generic Imp Chronitek K	of the second se		The desires	1.079799

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.

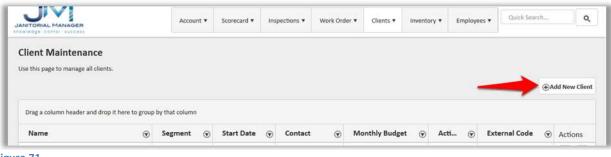


Figure 71

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.

JM	EM.		Account • 5	corecard •	inspections •	Work Order +	Clienta •	Inventory *	Employees *	Guive Sectors.	0
	mance alls and click the save Denne Zostander Sch			od [] • [GENERAL	SERVICES	ASSIGNME	its - Ports	NL PORTALL	i Linis O Save	< Back
eneral Informati	on:		Budget Inform	ation			Primary (Contact Inform	ution		-
arria			Rate	Pape	e		First Name		Last Nerro		
The Derek Zooland	ter Schour für Kids wi	io can	\$1,800.00	\$3	\$ 00.00		Deres		Zódian	der	
(pe	Start Date		floor	Wind			Ernall Addr	eta	Pas		
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ees.			Linery	Othe			Office Phot	ie.	Extension		
			\$100.00	50.	00 ‡		(252) 22	2-2222			
meterper Ref. Id	Tensoune		Monthly Total	5.54	reriv Unage Goal	(i)	tregino	Contact Notes			
3483 Generate		*	\$2,300.00	3.0	•						
spection inform	ation		Address Infor	nation			Seconda	y Contact Info	mation		
untily inspection	Contraction and the second second	ar	Street Address				First Name		Last Natio	6	
catton Number	anna :	÷	7 Parisey Street				Maury		Baltite	9	
567			DRy	Itate	20		Emel Addr		Fax		
arm Code			manepulle	- 44		5775	Baltzneit	@DZSK.com			
ann code				_	_		Office Phot	NE .	Extension		
							(252) 95	6-9632			
uilding Informati	lon		Billing Informa	tion			Emergance	Contact Notes			
uiding Name	Rudgennd Will	y Hrs	Street Address		Sat	e Al Above 📋					
02	10.00	÷.	7 Panas Stree	a							

Import Clients

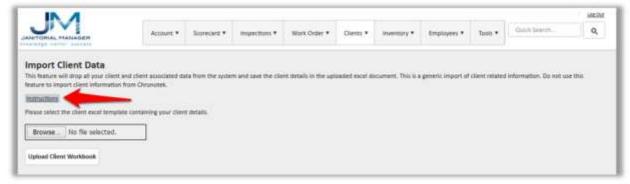
Note: In order to bulk import clients, you must be logged into the JM application with sufficient user privileges! **The Import features should only be used during initial setup.**

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

	Account *	Scorecard •	Impections *	Work Order •	Ciem: *	inventory •	Employees *	Tools *	Qui	hierth.	una q
Scorecard Scorecard At Clerits (Jan 01 3014 m Summary - January 01, 2			© Refresti , 2014		Rutgets Anniversarie Contacts Active List Terminated Clevis Detail	Lut	🕒 Export		r Edit Ə Prim	N Defete Q. Detail	
Income vs. Expenses For Januar	y 01 2014 thru Jan	uary 68 2014			Manage Cite	-					
Least Profitable		Expense	Breekdown -	81 81	Manage Sort		-	-			

Figure 73

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





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.

IN A DA	Per ante	1000 1 3	-	1.11.000		2410424	11 Sectors		18-1	1110	Constant of the	- Laura		
A LINK -	Caller	- II A'	* =	- (#)		The strong test	General	-	10	100	Normal	Bad		
Pada Pornal Partier	# 2 <u>0</u> -	11-1 ···	<u>∆</u> ′ ≡	**	a a	IR Anops & Cartier	8 - 16 - 1	9.4	-Conditional Formation	Formatian Table *	tinul.	Beutral		0
Christeff 15	19	10	4		Augente	1 3	C. Harden				25/69			
A2 -	1	This templa	rter in mere	ent to hel	a you fa	rmat your client lof	ormation in s	uch a wa	that Junits	rial Mars	ager can impo	int appropriately.		
	A		.0		16		D		E			1		
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1	efinitions belo	w, add rows b	o the Dwi	a sheet.	0o not o	and the second sec		an impor	t approprial	sely.				
1. Using the field d 2. Upload the save	efinitions belo	w, add rows b Manitorial Ma	o the Dat anager in	a sheet. nport dat	Do not o a page.	change the name of Frequently Asks	this sheet.	20.2000 T.C.2		ety.				_
1 1. Using the field d	efinitions belo	w, add rows b Manitorial Ma	o the Dat anager in	a sheet. nport dat	Do not o a page.	hange the name of	this sheet.	20.2000 T.C.2		tely.				
1. Using the field d 1. Using the field d 2. Upload the save What is a field? B	efinitions belo d workbook co ave a matching	w, add rows b Tanitorial Mi A fie chield in 17 th	o the Dat anager in Id is a pie	a sheet. quart dat see of inf	Do not c a joage. ormatio	change the name of Frequently Asks	this sheet. d Questions r will store ab	iout your	client.		import process	u. If you have que	utions o	

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
Туре	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

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.

JM	Account *	Scorecard *	inspections •	Work Order *	Clerts *	inventory *	Employees *	Tooly *	Quint Search	uit.04
mport Client Data										
This feature will strop all your client eature to import client information		ita from the syste	m and save the clie	nt details in the upl	oaded excel do	cument. This is e	genetic import of	client related	information. Do not us	699
entry of the barrene states and the	Control Control of Con									
NUTLICTORIA										
client excel templi	ate containing your clien									
	ate containing your clien		-							

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 <u>http://www.microsoft.com/en-us/download/details.aspx?id=13255</u>

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.

JUNITORIAL MANADER			Account •	Scorecard •	inspections •	Work Order •	Cierts •	inventory *	Employees *	Quick Search	0
Timekeeper Ern ise this page to manage tart take 02/10/2016	ors	/2016				Message	Partal Activit Burlights Antoximación Contacto Activit List Demonated L		Actions		۲
		25 • (horis) (r			(a)		Cleret Betall Menage Clere Manage Service Ceneria Impo	m (-	No. Service	

Figure 79

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

	Account +	Screecard • in	opections + Work C	order • Clients • invent	ory • Emplo	Gan's beards.	٩
lient Maintenance							
e this page to manage all clients.						d	Add New Client
Drag a column header and drop it here to grou	p by that column						
Name (j)	Segment 🛞	Start Date 🛞	Contact 6	Monthly Budget 🛞	Acti @	External Code	Actions
AMM Test Clent	General	01/24/2016	AMMA Test	\$12.00	No.	JanMgr-4006	@ ×
Anne's Accounting Service	west Side	30/11/2012	Anno Bomb	\$700.00	36	JanMgr-660	⊗ ×
Bank of Amarica	West Side	30/34/2014	Tim Timpony	\$1,500.00	165	JanMgt-1262	() ×
lig Government Contractor, inc	West Side	05/34/2013	Money Grabber	\$300.00	105	JantAgr-1038	© ×
							⊗ ×

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.

				Million	So	inclui • Clark • Incl	100y + 13	turiég	en brainyes +	Quirk fe	mer h.	4
Client Maintenance											@A4	d New Clier
Drag a column header and drop it	heret	o gro	up by that culume								1.0	
Name	ð.	æ	Start Date 🛞	Contact		Monthly Budget @	Active	۲	Deactivation Date	۲	Acti	ons
ACME Wholesale			11/03/2010	Jane Due		\$1,405.00	Vez				0	я.
			10/11/2012	Anne Bamb		\$650.00	Yes				0	×
Anne's Armory and Salt Show				and the second		\$1,078.00	Ves				0	8
Anne's Anney, and Salt Shop Big Guns Gym. & Pat Grapming			12/00/2011	Timmy Reithleck		31,07538						
			02/00/2011	and the second		\$400.00	Yes				0	

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.

Starbucks Addiction Treatment Center	01/35/2014	Term Grindler	\$1,208.00	Yes		0	*	
Sunshine Carget Cleaners	01/31/2010	Matthew Wilhelm	5500.00	Yes		0	8	
The Dentk Zoulandia School for Kidu	12/01/2011	Devek Zoolander	\$2,000.00	Yes		۲	8	
The Office		Micheal Scott	\$775-00	Yes		0	н	
Terreny's Car Lot Delation	13/03/2010	Tan Spankenhammer	\$775.00	No	09/24/2014 11/25	0	ō.	3
Tag Shaff Driving School	12/16/2011	Ted Nugert	\$125.00	Yes		10	121	

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.

										Log O	ut
		Account	Scorecard •	Clients *	Inventory •	Managers	Employ	ees 🔻	Quick Search	0	
ANITORIAL MANAGER											
owledge - contol - success											
Client Maintenance											
lse this page to manage all clients.											
see une beille se une uille on energie.									4	Add	New Clie
									œ	Add	New Clier
	group by that column								Œ	Add	New Clie
Drag a column header and drop it here to	group by that column	Start Date	Contac	t 🐨	Monthly Buc	lget 🌚	Active	•	• Deactivation Date	Add T	
Drag a column header and drop it here to Name	(T) (A (A))		•	U.	Monthly Buc	•		Ŷ			Actions
Drag a column header and drop it here to Name	(T) (A (A))	Start Date 02/16/20	•	U.	Monthly Bud	dget ⊕ \$150.00	Active Yes	•			
Drag a column header and drop it here to Name ACME Builders, Inc.	(T) (A (A))	02/16/20	•		Monthly Buc	•		•			New Clien

Figure 83

The following form will be displayed.

UNTERIAL MANAGER	Āc	ount * Scorecard *	inspections	* Wer	a Order * Clients * inv	entory +	Triple	ryees * Costan S	sait-		
Client Maintenance											
se this page to manage all clients.									+4	vdd tvera	cle
Drag a column headler and drop it here to grou	p by that column										
Name	y Segment	⊤ Start Date ⊤	Contact	т	Monthly Budget T	Active	т	External Code	т	Actio	inc
AMM Test Chest	Area Code 35805	Show items with val	los that:		\$12.00	Yes		Ion Mgr-4006		1	×
Anne's Accounting Service	WestSide	Is equal to	7.		\$700.00	76		tan Mg+-660		1	ж
Bank of America	Weit5ide				\$1,500.00	٧e		Ian Mgt-1262		1	
Big Sovierment Contractor, inc	WestSide	And +			\$500.00	Yes		Jan Mgr-958		1	
Big Gum. Gym & Pet Geooming	Area Code 35805	is equal to		ick	\$775.00	Ym		Jan Mgs-657		1	
Big Aper's Auto Seles	West5ide			-	\$1,550.00	Yes		tan Mgr-1045		1	
Cheese Factory Inc	Medical Facilities	Filter	Clear		\$175.00	Ves		Jan Mgr-957		1	
Dr. Freudenburger's Motion Spine Center	Medical Futilities	07/06/2015	CurtFreude	idsurger	5111.00	Yes		lan Mg-2503		1	
and the second se	March Code		take eskil					las kilas 1777		1001	

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

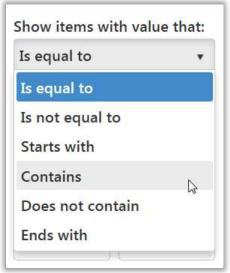


Figure 85

• In the value field enter "the"

Show items wit	h value that:
Contains	•
the	
And •	
Is equal to	•
Filter	Clear

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.

				Accest Score		· Dett.• Ine		Managers	Leg	keyesc +	Quick Streech-		Q,	
NITORIAL MANAGER														
wiedge-contol success														
Client Maintenance														
tion this manua to manager all clients														
the one bulle to interrube the chemiter														
se ou page to manife an Osint.												⊛A¢	d New	r Cire
	to gros	ap by that column										⊛A¢	id New	r Chi
Trag a column beader and drop it here	to gra	op by that column Start Date	۲	Contact	۲	Monthly Budget	Ţ	Active	۲	Deactiv	ation Date		Actic	
Inig a column beader and drop it here Name	to gra	Start Date	~	Contact Derek Zoolander			® 12,100.00	Active	۲	Deactiv	ation Date			ons
Ise this page to manage all clients. Drag a column beader and drop it here Name The Denk Zoolandie: School for Itids The Office	to gra	Start Date 12/01/2	911						۲	Deactiv	ation Date		Actic ©	in i



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

IN A								0.0	
	Account	Roward	• Date inations	Managers	Logi	Conch Search	h.	Q,	
Client Maintenance Use this page to manage all clients									
Drag a column header and drop it here t	o group by that column						⊕A	dd Ne	w Clie
Name	😧 Start Date 🛞 Conta	ct 🛞	Monthly Budget 🛞	Active	۲	Deactivation Date	• •	Acti	inns.
The Darek Zoolander School for Kids	Show items with value that:	olander	\$2,300,00	Yes				۲	х
The Office	Contains +	eatt.	\$735.00	- Nes				0	×
a a <u>s</u> a ai	the						1.	2 of 2	Retta
	And +								
	Is equal to *								
	Filter Clear								

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

				Account Scen	6Cak	d • Clients • Inventory	•	Manapet	Eng	koyen •	Quick Search .		945 Q	
Client Maintenance														
Use this page to manage all clients.												and the second second	ld Nev	
Drag a column header and drop it here t	o gin	up by that column												
Name	۲	Start Date	۲	Contact	۲	Monthly Budget	۲	Active	۲	Deacti	vation Date	۲	Actio	ons
The Derek Zoolander School for Kids		12/01/20	11	Derek Zoolander		\$2.10	0.00	Yes					0	×
The Office		12/10/20		Micheal Scott		\$73	5.00	Yes				-	0	×
14 14 <u>1</u> 4 14												-	1	th Cite

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.

	Account • Score	ecard • Inspections	Work Order •	Clienta • invento	ry • Employees •	Quick Search	Q.
Client Maintenance Update the client details and click the save button w Change Client The Derex Zoolander School for Ki		• GENERA	SERVICES	ASSIGNMENTS (ortal Portal		Back
General Information	Budget Informati	00		Primary Contact I	nformation		
Name	Rate	Paper		First Name	Last Nam		
The Derek Zoslander School for Kids who can	\$1,800.00	\$100.00 \$		Deres	Zoola	ndet	
Type Start Dete	Pinor	Window		Email Address	Fai		
Stishe - 12/7/2017 🗮	5200.00	\$100.00		Model1@botmail	com		
Notes	Lawn	Other		Office Phone	Extensio	62	
	5100.00	50.00		(252) 222-2222			
	Munithly Total	N Stoply Usage G	sal :	Emergency Contact N	lotes)		
Timekenper Ref. Id Timesone	52 300.00	3.00 ‡					
3485 Generate Central +							
Inspection Information	Address Informat	ion		Secondary Contac	t Information		_
Monthly Inspection 🖌 Spare Key 🖌	Street Address	1011		First Name	Last Nam	e.	
Location Number	7 Pansey Street			Mary	Balisti	ein	
567	Cm	State 7	0	Email Address	Fas		
Alarm Code	Huntsville	AL	35775	Ballstein-@025K.cd	m		
7	11	11 m		Office Phone	Extensio	n)/	
				(232) 995-9652			
Building Information	Billing Informatio	n		Emergency Contact N	otes		
Building Name Builgeted Willy Hrs	Street Address	1	ame As Above 📋				
02 10.00 🗘	7 Paniny Street		AREAN ALCONTRACTOR				40
	City	Shate Z	le .				

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!

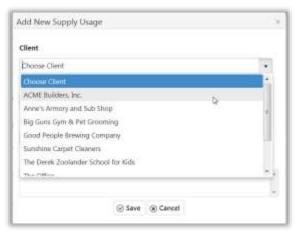


Figure 91

Select the Manage Clients command from the Clients dropdown list.

ANITORIAL MANAD				Account •	Scorecard *	impectors •	Work Order *	Clerts *	inventory *	Employees *	Quit Levels	0
Timekeeper I one this page to mar issuit thele 02/30/2036	Error	urs associated with	h the new					Elected Activity Biologiths Accoversation Contacts Active List Terremented 1				
Error Type			۲	Date		ŵ	Message	Chert Detail		Actions		۲
								Manage Cite				
	••	25 🔹	Sec. 4	* 3 MIT				Manage Service General Impo Chronomek Im	ert		The desire	10.01000

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 - <u>Click Here...</u>

												Log Out
JV			Account	Scorecar	d • Clients •	Inventory •	Manager		Employees •	Quick Search.	2	Q
ANITORIAL MANAGER												
Client Maintenance												
Jse this page to manage all clients.												
											e	Add New Client
Drag a column header and drop it here to	o gro	up by that column										
Name	€	Start Date 💮	Contact	\odot	Monthly Bud	dget 🕤 🕤	Active	۲	Deactivati	ion Date	•	Actions
ACME Wholesale		11/03/2010	Jane Doe			\$1,465.00	Yes					0 ×
Anne's Armory and Sub Shop		10/11/2012	Anne Bomb			\$650.00	Yes					Ø ×
Big Guns Gym & Pet Grooming		12/08/2011	Timmy RedNe	ck		\$1,078.00	Yes					Deactivate Clier
Good People Brewing Company		03/16/2010	Ed Koch			\$900.00	Yes					0 ¥ 📐
Starbucks Addiction Treatment Center		01/30/2014	Tom Grinder			\$1,200.00	Yes					0 ×
Sunshine Carpet Cleaners		01/31/2010	Matthew Wilhe	sim		\$600.00	Yes					× ©

Figure 93

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

			Armet Score	ant	Dant + Inamy +	Marager		Implayate Carch Stand	-		Q.	
Client Maintenance												
Class according methodad												
the this page to manage all clients. ^{Not}												
										944	d New	Cier
Diag a column header and drop 3 have to p	-	by that column										
Name	۲	Start Date 🛞	Contact	۲	Monthly Budget @	Active	÷	Deactivation Date		Acti	ons	
AGME.Wholesale		15/02/2010	Same Dros		\$1,465.00	Twy				0	$\left[x \right]$	
Anno's Annoy and July Illina		10/11/2017	Anna Barrill		3150.00	746				0		
Big States Gym IR Pot Geneming Direction		Q/08/2011	Timmy Redlieck		\$1,576.20	540		04/07/2014 10:27		0	6	я
			Editor.		1900.00	10				0	-	
Good People Directory Company		05-26-26-00	C2 BALL									
Genel People Denorg Company Darbucks Addiction Treatment Center			Tam Grindler		\$1,250.00	Yes				0	*	

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.

$\cdot \mathbb{N}$	1							10000			r Denna och	(ae)
ANTONIAL MAN				Account *	Scorecard *	impections *	Work Order *	Clerts *	inventory *	Employees *	Quit Seech	Q,
Timekeeper	r Erron	S find thate 02/17/2016	h the tink	keeper Niéds.		Ŧ	Message	Burtal Activity Burtgetts Annivermatics Contacts Active List Terminated List Client Details		Actions		
			0.7510				- (A-CATE)	Manage Clevel		A DESCRIPTION		1
0		25 +	(Second Sec					Manage Servic Generit Impor Chronotek Imp			The desce	10-01-0110

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- <u>Go To</u> <u>Details...</u>

			America (-	alt Clark F Stanlage	Manageri	(and hand	-	6		
Client Maintenance											
ne this page to manage all clients.									⊕Ada	i New	Cie
Orag a column header and drop it t Name	Start Date		Contact	۲	Monthly Budget 🛞	Active %	Deactivation Date	۲	Actio	ins	
ACME Wholesale (inactive)	11/03/2	010	Jane Doe		\$650.00	NO.	01/21/2014 09:31		0	۵	*
ACME Builders, Inc.			John Doe		\$250.00	Yes			۲	×	
		005	John Dole			Yes			0	×	

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

								Welcome, demouse	r Log Out
		Account	Scorecard •	Clients • Inv	ventory •	Managers	Employees *	Quick Search	Q
NITORIAL MANAGER									
wledge-contol-success									
lient Maintenance									
Client successfully deactivated.									
se this page to manage all clients.									
se trus page to manage an enertis.									
se this page to manage an cherts.									⊕Add New Clier
Drag a column header and drop it here to gr	oup by that column								⊕Add New Clien
Drag a column header and drop it here to gr	Tran 201992	Contact	T	Monthly Budge	et 🕞	Active	 Deactiva 	tion Date 🕞	Add New Client Actions
Drag a column header and drop it here to gr	Start Date	 Contact Jane Doe 	•		et 🕤 \$1,465.00	Active Yes	Deactiva	tion Date 🕤	
Drag a column header and drop it here to gr Name	Start Date	0 Jane Doe	©		•		⑦ Deactiva	tion Date 💿	Actions
Drag a column header and drop it here to gr Name ACME Wholesale	Start Date 11/03/201	0 Jane Doe 2 Anne Bomb			\$1,465.00	Yes	Deactiva 04/07/2014		Actions

Figure 97

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

				then Sconard •	Clients • 1	Inventory •	Managers	Employees •		ings.
Client Maintenanc Jue this page to manage all cl	e Client no lents.	coedfully activated.								
Drag a column header and do		oup by that column							d New (
Drag a column header and do			Contact e	6 Monthly Budget 6	Active *	÷	Deactivation Da	177.00		
	op it here to gr		11110042000	6 Monthly Budget 6			Deactivation Da	177.00		ns

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 <u>De-activating a Client</u>

Select the Manage Clients command from the Clients pulldown list.

ANTONIAL MANA				Account •	Scorecard *	impectors *	Work Order *		inventory *	Employees *	Quité Search	٩
Timekeeper	Erron rage er	rurs associated wit	th the Tim	ekenper Nedti.				Biotal Activity Biologity Annovemanies Contacts				
02/30/3036		find Date 02/17/2016		& Refresh				Active List				
Error Type				Date		۲	Message	Chierel Details		Actions		۲
								Manage Clevel				
	* 07	25 •	10000	er poge				General Import			far inner i	-

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- <u>Go To</u> <u>Details...</u>

						they Someand •	Clients •	Iner	Kory * Managara 1	Onipkoye	(*	5	1.15 (11)(j)
Client Maintenance													
use this page to manage all clients.											DAde	d New	. etia
Drag a column header and drop it h	ere to j	group by that col	ümn								-		, care
Name	۲	Start Date	۲	Contact	۲	Monthly Budget 🛞	Active	۲	Deactivation Date	۲	Actic	005	
ACME Wholesale (inactive)		11/03/2	1010	Jane Doe		\$650,00	No		01/21/2014 09:31		0	¢	ж
ACME Builders, Inc.		02/16/2	1005	John Doe		\$250.00	Ves				Ø	8	
terror terror de la cher		10/11/2	1012	Anne Bomb		\$650.00	Yes				0	×	
Anne's Armony and Sub Shop													
Big Guns Gym & Pet Grooming		12/08/2	1011	Timmy RedNeck		\$1,076.00	Ves				۲	\times	

Figure 100

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

						then Sciencert	6	Clients •	ini	ntory • Managers	Imploy	•	-54	Log Qui etSings
Client Maintenance														
we this page to manage all clients.														
														e Client
Drag a column header and drop it h	1015 TO g	roup by that colu	inn:											
Orag a column header and drop it I Name		roup by that colu Start Date		Contact	۲	Monthly Budget	۲	Active	۲	Deactivation Date	۲			
Orag a column header and drop it I Name ACME Builders, Inc. (martive)			۲	Contact John Doe	۲	Monthly Budget	8	Active	۲	Deactivation Date 01/22/7014 12:19	۲	all the second	dens.	

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

		· Cherg + Jammin	• Main	and Instants			-
IANITORIAL MANAGER							
Client Maintenance							
Chertan childs perchased							
Dor this page to manage all clients.							
						244	New Ole
Overg a column balance and it					č.		
the second se	is will permanently delete this client record and all	ssoociated data including su	oply usage.	inspections and		Actio	896
Are you sure? Th	ss will permanently delete this client record and as	asoociated data including su	pply usage.	inspections and	• •		6 N
Natter Are you sure? To accrecards.	is will permanently delete this client record and all	nsoocialed data including su	pply usage.	inspections and	• •		
Name Are you sure? The scorecards	is will permanently delete this client record and a6	associated data including su 1 (State as			• •	0 0	6 ×

Figure 102

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



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.

		erouet •	Scorecard +	impections •	Work Order •	Clients •	inventory •	Employees	·	Gielik Search Li	Q,
lob Classification Mainter	nance										
Use this page to manage all job classifica	itions.									-	
Prow All Job Classifications 📋							New Job C	lassification		-	Save
Drag a column header and drop it her	e to group by that co	Aaren									
Name	۲	Employe	es .		۲	Active		۲	Actio	as	
	۲	Employe	es	3	۲	Active	Wes	۲	Actio	ns. X	

Figure 105

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

		Account +	Storecard +	impediam +	Wark Orde	r • Clienti. •	insentory *	Bripioye	e •	Q.
Job Classification Main	tenance									3
Use this page to manage all job class	Reations.									
Show All Job Classifications 💿							New Job Clas	incation	Hoar Tech	V Save
Drag a column headwr and drop it h	re to group by that col	ienn.								
Name	τ.	Employees			т	Active		т	Actions	
Floor Scrubber			9				Tes		1 ×	

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.

	Account • Scorecard •	Inspections • Work Ord	er • Clients •	inventory •	Employees •	Quick Search	Q,
Scorecard Scorecard: All Clients 2014	* Street	h			Tracking Performance Be Anniversaries Birthdays	views	
Summary - January 01, 2014 th		14		(2 to			
Least Profitable	Expense Breakdown		Profit/Loss		Manage Employ	ees	
The Party of the First Part (\$160.47) Jann's Cakes \$271.52 Top Shell Driving School \$316.40 Cheese Factory Inc \$487.25 XiMation \$733.40	Add Sves Mac	\$280,000 \$200,000 \$150,000 \$100,000 \$50,000	\$190,669	\$72.093	Manage Job Clar Manage Job Clar Managers Generic Import Chronotek Import		-

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.

IN A									-12	(int O
ANTORIAL MANAGER		Account +	Scorecard +	impections *	Work Orale	r* Clem *	inventory +	Employee	 Quick Search 	9
lob Classification Mai	ntenance									
Use this page to manage all jub cla	is/fications.									
Show All Job Classifications 💿							New Job Che	illication		or Save
Drag a column header and drop it	here to group by thet col	lumn								
Name	Ŧ	Employees			Ť,	Active		τ /	ctions	
Floor Scrubber			9				103		/ . 🔶	-

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.

	Account • S	corecard • inspection	ons • Work Order •	Clients •	Inventory *	Employees •	Quick Search	Q,
Scorecard						Tracking Performance Be Anniversaries	views	
Scorecard: All Clients 2014		© Befresh				Birthdays		
Summary - January 01, 2014 t	hrough December	31, 2014			(De			
					(and the	terminated List		
Income vs. Expenses For January 01 20	14 thru December 31 20	14				Employee Detail	N	
Least Profitable	Expense	Breakdown		Profit/Loss		Manage Employ	995	
	Add. Svcs.	1	\$260,000			Manage Perform	sance Dimensions	
The Party of the First Part (\$160.47)	Mac	and and a second se	\$200.000 \$1	0,669	1	Manage Job Clar	sifications	
Jane's Cakes \$271.52		- Labor		and a second		Managers		
Top Shelf Driving School \$316.40	Visurance		\$150,000	\$110,577		Generic Import		
Cheese Factory Inc \$487.25			\$100,000	1	\$72.093	Chronotek Impo	et .	
XiMation \$733.40	1.1		\$50,000			conclusion impo	u., []]	

Figure 109

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

	Account + Scorecard +	impectors +	Work Onler +	Clem *	Inventory +	Employees *	Quick Search	0,
								✓ Save
to group by that colo	umn							
т	Employees		T Acti	ve		Actio	ans	
	9				Yes	1	×	
		enance atoms s to group by that column T Employees	enance atoms s to group by that column T Employees	enance cations. In to group by that column T Employees T Acti	enance cations. In to group by that column The Employees The Active	enance cations. In group by that column The Employees That column	enance Latins. In to group by that column The Employees The Active	enance satiss. New sit Classification T Employees T Active

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.

				Account •	Score		apections	• Work	Order	Cierts	inventory +	Employees •	Quick be	e#17	4
mployee Main														⊛Add	New Employ
Drag a column header	r and	drop II here to group Emp. Statue	by the	it column Job	T	# Clienti	۲	Active	۲	Deactivation	Data 🛞	External Code	œ	Actic	yma.
Drag a column header Name Bons, Sonny			1.500		(7)	# Clients 2	•	Active	۲	Deactivation	Data 🛞	External Code	•	Actic ②	ma. (×)

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

				Account 🔻	Score	card • Ins	pections	• Work C	Irder 🔻	Clients •	Inventory *	Employees *	Quick S	earch	c
Employee Ma Use this page to man												_	>	⊕Add I	New Employe
				: w =											
Drag a column hea	der and	I drop it here to group Emp. Status	by that	t column Job	۲	# Clients	۲	Active	•	Deactivation	Date 🕤	External Code	e (7	Actio	ns
			۲		۲	# Clients 2	۲	Active Yes	•	Deactivation	Date 🕤	External Code	• •	Actio	ns ×
Name		Emp. Status	۲	Job	۲		۲		Ŷ	Deactivation	Date 🕤		e 🕤		

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.

Employee Ma	Internet									
Update the employee		r Save	- button when fire	shed.						
Charge Employee							-			
	and a second						-	Save @ Cao	ef.	
General Informati	on					Address Information	n	0.000		
First Name	Last Name		Social Security		Birth Date	 Street Address	V.			
Michael	Stipes		316-51-6516		12/16/2033	Driver 8 Lane				
Employee Ref. td	Juli Class		Status.		Status Effective	city	State.	ðр		
	3med		PartTime		5/16/2013	Decatur	64	35708		
Hire Date	Hourly Wage		Timekeeper Ref	.td						
32/36/2013	\$9.00	:	367 - 293	Gene	rate	Contact Information	n			
inspector?						Home Phone	Email Address			
						(256) 526-5545	support@ja	nitortalmanager.com		
Notes						Cell Phone	Contact Metho	d		
						[216] 464-698	OfficePhone			

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.

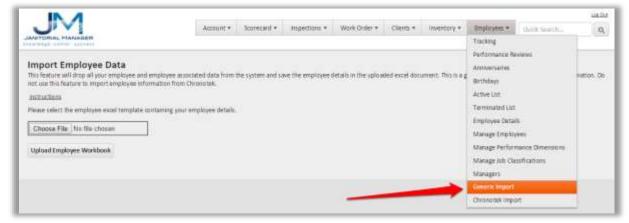


Figure 115

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

	Account +	Scarecard • respections	* Work Order *	Clients + Inventor	r = Employees =	Outlik tearih	he.
Import Employee Data This feature will drog at your employee and emp net use this feature to import employee informa-	Avyee assessment data from th	he system and save the emplo	vee details in the uptrue	ded exact document. This	s a generic impors of a	malayee related information.	
instructions							
Please select the employee excel template conto	ning your employee deballs.						
Choose File No file chosen							
Upland Employee Workbook							

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.

HOME MORE PART PAREI AV	OUT HORM	utat Data Hy	the with		Ereph	upia (report) Terriphia	(U.Ma-Tical			
No.	-111 - 16	· = = [] &	EF-Wag Test	Germani +	1947 144	Normal	No.	0006	Adverted	Catrolation
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Classed 74 Par	é	6	1 (1 (1 (1 (1 (1 (1 (1 (1 (1 (1 (1 (1 (1	Australiant in the	12/12/14/14			yeri.		
A. + 1 + 1										
			D					+		
Employee Import Template this template is meant to hele you for			uch a way that landors	d Manager can import a	ppropriately.					
 Using the field definitions below, a Z. Uplical the saved workbook on land 			ange the name of this if	heet.						
a		All the second second	· · · · · · · · · · · · · · · · · · ·	Frequently Asked Ca	unitien					
What is a field?	4 field is a pre	ece of information can	itorial Manager will stor							
What if we don't have a matching field in our current system?	if the field is	not required, just leav	e it blank. White spaces	and blanks are skipped	d during the impos	t process. If you to	we questions on re	quired fields, g	ilease mitart ni	itomer support.
Why an Linkburg an employee after the import process?			I There are many reason position. Please confact						mpłoyee mie is t	the proper form
What does 'Test - Specific Values' recon?	and the second second second	require specific test vi s for these cases.	lues to work correctly. (Client Type and Phimary	Poefwrrwd Contac	1 Method are exam	quies. The system o	vill not accept 3	unt any text valu	e, we require
mean?	specific value	is for these cases.		I on the first four eddres						
nean? Tonly have one address, which helds	specific value	is for these cases.	Odress are the same, fill	I on the first four eddres						
reean? 1 only have one address, which helds should t use?	(pecific value (Fyour client) Into the client	is for these cases.	ódress are the same, fill alla so you don't have to	I on the first four eddres		goultons 3,6,7 an				
recen? 1 only have one address, which helds should Luw? Field	(pecific value (Fyour client) Into the client	s for these cases. I address and billing a Th billing address dels	ódress are the same, fill alla so you don't have to	Ion the first four addres provide them takks.	s fields located in	goultons 3,6,7 an				
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recon? 1 only flaves one address, which halds theolid I use? Field M Adversative Defenence Id	Pecific value	s for these cases. a address and billing a the billing address deta Column Position 2	obes are the tame, All als to you don't have to Format Stanber	In the fast four eddees provide them taxos.	s fields located in	goultons 3,6,7 an				
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recon? 1 only have one address, which helds throuid Luw? Field 14 Abstration Teference Id Flort Name Last Name Social Security Namber	pecific value if your client into the client Required? Yes. No Yes. Yes.	s for these cases. I address and bifting a the bifting address deta Column Position 3 2 3 4 5	obless are the same, fill lifs so you don't have to Format Asamber Text Text Text Text	In the first four addres provide them taxos. Restrictions Max 35 chars Max 35 chars	s fields located in	goultons 3,6,7 an				
recen? 1 only frage one address, which helds should i use? Field 14 Alternative References Id Ford Mone Left None Social Security Number Eicht Date	Pecific value if your charf) into the clien Required? Yes No Yes Yes Yes	s for these cases. I address and bifting a the bifting address deta Column Position 3 2 3 4 5	ddress are the same, fill as so you don't have to Format Namber Text Text Text Text Text Text Text	In the first four addres provide them taxos. Restrictions Max 35 chars Max 35 chars	s helds located in Specific Val	positions 3,6,7 akr		e of true to po	ution 8. We'll cop	oy the address d
recon? Torchy have one address, which halds should tow? Field M Advantation Reference Id Find Name Social Security Therefore Birth Date Social Security Therefore Birth Date Social Security Therefore	Pecific value if your client into the client Required? Yes No Yes Yes Yes Yes	s for these cases. A address and billing as to billing address sets Column Position 2 2 3 4 5 6	othess are the same, fill as you don't have to Format Norebor Test Test Test Test Test Test Test	In the first four address provide them taxts. Restrictions Max 20 chars Max 25 chars Max 25 chars Max 25 chars	s helds located in Specific Val	positions 5,6,7 and	08 and put the valu	e of true to po	ution 8. We'll cop	oy the address d
recon? Tonly have one address, which helds thould tow? Field M Advantine References Lat Name Lat Name Sold Security Warrier Bith Date Sold Classification States	Peecific value If your clear into the clear Required? Yes Yes Yes Yes Yes	s for these cases. A address and billing a Column Position 3 2 2 4 4 5 6 7 8	ddress are the same, fill als so you don't have to Format Mamber Tarit Test Test Test Test Test Test Test Tes	Restrictions Mar 20 chars Mar 20 chars Mar 21 chars Mar 21 chars Mar 21 chars Mar 21 chars	s fields touried in Specific Va	positions 5,6,7 and	08 and put the valu	e of true to po	ution 8. We'll cop	oy the address d
recen? 1 only fares one address, which fields should i use? Field M Afternative Reference id Food Name Last Name Last Name Social Security Number Sight Data Soly ClauseRicpiton Status (Thective Data	specific value if your client into the client Required? Yes Yes Yes Yes Yes Yes Yes Yes	s for these cases. A address and billing a Column Position 3 2 2 4 4 5 6 7 8	ddess are the same, fill is so you don't have to Format Nambes Text Text Text Text Text Text Text Text	Restrictions Mar 20 chars Mar 20 chars Mar 21 chars Mar 21 chars Mar 21 chars Mar 21 chars	s fields touried in Specific Va	positions 5,6,7 and	08 and put the valu	e of true to po	ution 8. We'll cop	oy the address o
mean? Tonly have one address, which helds	specific value if your clearly into the clear Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	s for these cases. h address and bitting a fra bitting address deta Column Position 2 2 3 4 5 6 7 8 10	others are the same, fill its so you don't taken to Format Aventes Text Text Text Text Text Text Text Text	Restrictions Mar 20 chars Mar 20 chars Mar 21 chars Mar 21 chars Mar 21 chars Mar 21 chars	s fields touried in Specific Va	positions 5,6,7 and	08 and put the valu	e of true to po	ution 8. We'll cop	oy the address d
recen? Tonly have one address, which helds thould Low? Field N Abarration Patienana M Fot Avere Let Name Let Name Social Security Number Birth Data Sofo (LawRingtion Status Effective Data Wire Data	specific value if your client into the client Yes Yes Yes Yes Yes Yes Yes Yes Yes	s for these cases. h address and bitting a fra bitting address deta Column Position 2 2 3 4 5 6 7 8 10	ddress are the same, fill als so you don't have to Format Asambo Test Test Test Test Test Test Test Test	Restrictions Mar 20 chars Mar 20 chars Mar 21 chars Mar 21 chars Mar 21 chars Mar 21 chars	s fields touried in Specific Va	positions 5,6,7 and	08 and put the valu	e of true to po	ution 8. We'll cop	oy the address d

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	

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.

					LOU.CO
	Account Scorecard • Cherite •	Inventory • Managers	Employees *	Quick Search	9
JANITORIAL MANAGER					
Import Employee Data					
This feature will drop all your employ	vee and employee associated data from the sys	stem and save the employee	details in the uplo	aded ercel document	
Instructions					
Please select the employee excel terr	plate containing your employee details.				
Choise File My Employees dax					
Upload Employee Workbook					



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.

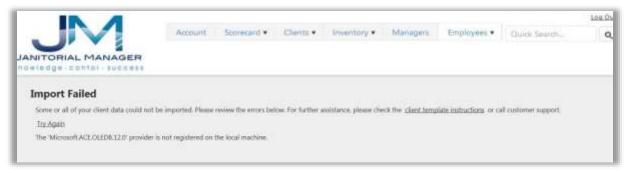


Figure 120

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

Microsoft Download Shop Products		Support Security		٩
1 Micro	osoft Acce		e Engine 2010 Rec	distributable 🛛 share 🖬 <
Select Language	English		Download	Free PC updates
	er of data betw	een 2010 Micr	ts that can be used to osoft Office System	Security patches Software updates Service packs Wardware drivers Run Microsoft Update

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.

File Name	Size	
AccessDatabaseIngine.exe	25.3 MB	Download Summary:
AccessDatabaseErigine_sti4 exe	27.3 MB	You have not selected any lifes to 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:

	-
licrosoft Access database engine 2018 (English)	8
Welcome to the Microsoft Access database roughe 2010 (Eng	lish) Installation Wizard
The Settap Witzerd will install Microsoft Access database engine 2010.	(Englisht) an your camputer.

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.

		Account +	Scorecard •	Inspections •	Work Orde		Inventory *	Employees •	Quick Search	Q.
Scoreca	ard All Clients 2014		C Refresh					Tracking Performance Rev Anniversaries Birthdays	lews	
	ary - January 01, 2014 thro	- 51		1			() E	Active List Terminated List		
Income	Least Profitable		nse Breakdown			Profit/Loss		Employee Details Manage Employe		-
The Parts	y of the First Part (\$160.47)	Add. Svcs Misc			\$250,000	\$190,669		Manage Perform Manage Job Clas	ance Dimensions	

Figure 125

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

				Account •	Score	cont + ins	pections '	• Work	Order 1	• Clients •	Inventory +	Employees •	Quick be	691 7	
mployee Main														⊛Add	New Employ
Drag a column header		drap II here to group	1860			# Chevra	0	Active		Deartheation	Data 🗢	External Code			227
Drag a column header Name	۲	drop II here to group Emp. Status	by the	dot	۲	# Clients	۲	Active	۲	Deactivation	Data 🛞		• •	Actic	
Drag a column header	۲	drap II here to group	1860			# Clients 2	۲	Active	۲	Deactivation	Data 🛞	External Code	• @	Actic	sma ×

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.

			Accoun	it ▼ Sc	orecard v	Inspectio	ons 🕶	Work Order 🔻	Clients *	Inventory •	Employees •	Quick Search	(
mployee M	ainte	enance											
Ise this page to ma	nage all	employees.											
												Add New I	Employ
Drag a column he	ader an	d drop it here to grou	by that col	umn								⊕Add New I	Employ
Drag a column he Name	eader an	d drop it here to grou Emp. Status	by that col		۲	# Clients	•	Active 🕤	Deactivatio	n Date 🕞	External Coo		Employ
		S 5.3	jol 🕤		T	# Clients 0	۲	Active 🕤 Yes	Deactivatio	n Date 🕤	External Coo JanMgr-3963		Employ

Search for employee

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

		Accou	unt • Scorecard •	Inspections v	Work Order 🔻	Clie	ents 🔻 Ir	iventory	▼ Employees ▼	Quick Search.	a.	
Employee Mai										⊛Add	New E	mploy
Dra tolumn header	and drop it here to gro	oup by that	column									
Dra tolumn header i Namရှ _က (ခု	and drop it here to gro Emp. Status		column lob	T	# Clients	T	Active	۲	Deactivation Dat	e 🕤	Actio	ons
-		ۍ ا		۲	# Clients 3	۲	Active Yes	۲	Deactivation Dat	e 🕤		
Name.	Emp. Status	⊕ J	lob			۲		۲	Deactivation Date	e 🕤		
Name G	Emp. Status PartTime		lob Ioor Scrubber		3	۲	Yes	۲	Deactivation Dat	e 🕤	0	×

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.

TORIAL MANAGE				Account •	Scorec	ard • Inspe	ections *	Work O	rder 🔹	Clients •	nventory •	imployees •	k Search		٩
mployee Mai													⊕Ada	New E	mplayee
Drag a column head	er al	nd drop it here to gro	iup by ti	hat column											
Name	Ð	Emp. Status	۲	dol	۲	# Clients	۲	Active	۲	Deactivation I	Date 🛞	External Code	۲	Actio	ns.
Presley, Jamie		FullTime		Floor Scrubber				Yes				JanMgr-865		Ø	×
Smith, Timmy		PartTime		Floor Scrubber		8		Yes				JanMgr-853		\odot	×
Stipes, Michael		PartTime		Lead		6		Yes				JanMgr-864		Ø	*
Supervisor, Sally		PartTime		Floor Scrubber		6		Ves				JanMgr-1429		۲	×
Szyslak, Moe		PartTime		General Cleaning		6		Yes				JanMgr-859		Ø	×
Theknife, Mac		FullTime		Lead		4		Ves				JanMgr-893		0	×
Turner, Tina		PartTime		House Keeping		7		Yes				JanMgr-861		Ø	×
User, Demo		PartTime		Office Staff		- 4		Ves				JanMgr-3147		0	×
Williams, John		PartTime		Manager		2		Yes.				JanMgr-1423		0	×

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.

UNITORIAL MANA			Ac	count •	Scorecard •	Inspections •	Work Order +	0	lients ¥	inventory	• Employees •	Querk Search.		•
Employee 1 for the page to m												⊛Add	New E	mploye
107-116-1	ader ar	id drop it here to gro Emp. Status		at column Job		۲	# Clients	۲	Active	۲	Deactivation Dat	te ®	Activ	ons
Name	ader ar	The state			iliber	۲	# Clients	۲	Active		Deactivation Dat	te 🛞		ons
Name Coltostin, John	ader ar	Emp. Status		Job Floor Scru	alaber ik. and Bottle W			۲			Deactivation Dat	le @		×
Irag a column he Name Colitostin, John Eletcher, Fietch Harby, Ed	ader ar	Emp. Status		Job Floor Scru	k and Bottle W			۲	Yes		Deactivation Dat	te 🌚	0	×



The following form will be displayed.

		Accou	nt • Scorecard •	Inspections *	Work Order *	Clients *	Inventory	 Employees * 	Guidt Skarth		10
imployee Ma	intenance										
Drag a column heade	Show items wi	and a subscription of the second	ame .						⊕Add	New E	imploy
Name	Is equal to			۲	# Clients	(e) Act	we 🛞	Deactivation Da	te 🛞	Acti	ons
Coltostin John.	And .		r Scrubber		3		Yes			Ø	×
Eistcher, Eistch			Cook and Bottle W	aiter	1		Yes			0	- 26
ttaries. £it	Is equal to	•	I Sciubber		2		Yes			0	×
Hope, Bob			i Scrubber		4		Yes			ø	×
	Filter.	Clear	/ Scrubber				Ves				*

Figure 131

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

is equal to	
Is equal to	
Is not equal to	
Starts with	
Contains	
Does not contain	LA.
Ends with	



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

Show items with v	value that:
Contains	•
turner	
And •	
Is equal to	•
Filter	Clear

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.

Name	🛞 Emp. Status 🛞 Je	ob	# Client		Active	۲	Deactivation Date	۲	Actio	aji ti
Turner, Ting	Show items with value that:	of Cook and Bottle Washer		0	Ves				۲	×
1	Contains •							14	1003	me
	tumer									
	And •									
	Is equal to •									

Figure 134

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

NITOPIAL MAN				Account +	Scorecard •	inspections	• Work Order	* :	Clients *	Inventor	y • Employees •	Guidt Skarch	X
												⊕Add	New Employ
	ead iai		a goup t		1		# Clients	14	Active		Deactivation Date	10	Actions
Drag a columni Name Tutter, Eco		er and drop it here b Emp. Status Paglane		Job	, and Bottle Washe		# Clients	۲	Active Ym		Deactivation Date	۲	Actions

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.

	Account +	Scorecard *	Inspections •	Work Order	• Clients •	Inventory *	Employees •	Quick Search	Q.
Scorecard All Clients 2014		Ø Refresh					Tracking Performance Rev Anniversaries	liews	
Summary - January 01, 20		er 31, 2014	1			0	Birthdays Active List Terminated List		
Income vs. Expenses For January							Employee Detail		
Least Profitable The Party of the First Part (\$160	Add Sycs	nse Breakdown		\$250,000	Profit/Loss		Manage Employ Manage Perform Manage Job Clas	ance Dimensions	

Figure 136

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

NITORIAL MANAG	ER		Acc	ount • Scorecard •	Inspections *	Work Order 🔻	CI	ients 🕶 🛛	nventory	✓ Employees ▼	Quick Search.	μ.	
Employee N Jse this page to m										- 0 - 14. -			
Drag a column he	ader a	nd drop it here to gro	oup by th	at column							⊕Add	New E	mploy
Name	۲		۲	dot	۲	# Clients	۲	Active	۲	Deactivation Date	T	Actio	ons
Coktostin, John		PartTime		Floor Scrubber		з		Yes				\odot	×
Eletcher, Eletch		FullTime		Chief Cook and Bottle Wa	sher	1		Yes				\odot	×
Harley, Ed		FullTime		Floor Scrubber		2		Yes				\odot	×
Hope, Bob		PartTime		Floor Scrubber		4		Yes				0	×
Malone, Sam		FullTime		Floor Scrubber		1		Yes				\odot	×
Presley, Jamie		FullTime		Floor Scrubber		2		Yes				0	×
Smith, Timmy		PartTime		Floor Scrubber		2		Yes				\odot	
Stipes, Michael,		PartTime		Chief Cook and Bottle Wa	sher	2		Yes				\odot	X
Szyslak, Moe		PartTime		General Cleaning		0		No		03/13/2014		\odot	c
Theknife, Mac		FullTime		Chief Cook and Bottle Wa	sher	0		Yes				0	×



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

Employee	Termination	Date	
Michael Stipes	3/25/2014	m	
Notes Turned in notic	e to quit. Said	wanted to gr	i *
	and get an adv		

Figure 138

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

itpei, Michael	PartTime	Lead	6	hn 02/27/2018	linchAgr-864	0 0
Supervisor, Sally	PartTime	Floor Scrub/ber		Yes	Jan Mar-1429	@ ×

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.

Employee	Termination	Date	
Sonny Bono	2/27/2016		
Notes			
This employee is a	n inspector for 228	future inspections	+
		future inspections	+
		future inspections	+
How would you TR	e to proceed?	-	+
How would you lik Select Action	e to proceed?	future inspections	+

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.

	MANAGER	Account +	Scorecard •	Inspections v	Work Order	• Clients •	Inventory •	Employees •	Quick Search	Q,
Scoreca	ard All Clients 2014		C Refresh					Tracking Performance Rev Anniversaries	lews	
Summa	ary - January 01, 2014 thro	ugh Decemb	oer 31, 2014	4			() E	Birthdays Active Luit Terminated List		
Income v	vs. Expenses For January 01 2014 t	hru December 33	2014					Employee Details	C. Edg	
The Party	Least Profitable y of the First Part (\$160.47)	Expe Add. Svcs Misc -	inse Breakdown		\$250,000	Profit/Loss		Manage Employe Manage Perform	ance Dimensions	-

Figure 141

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

				Account •	Scorec		ections *	Work		• Clients •	inventory •	Employees •	Quick5	eerch		10
mployee Mair	nter	nance														
mployee successfully d	martr	wateri.														
se this page to manage																
														(+)Add 1	New Emple	ione i
														w		
Drag a solumn header	rand	drop /f. here to group	p by th	ut column										***		
Drag a solumn header Name	r and	drop IT here to grow Emp. Status	o by ti ®	ut culumn Job	۲	# Clients	T	Active	۲	Deactivation	Date 🛞	External Cod		Actio	ma 👃	/
Name		194			۲	# Clients 0	Đ	Active		Deactivation 02/27/2016	Date 🌚	External Cod				-
Name		Emp. Status		dol	œ		œ				Data 🌚			Actio	ns a ×	•

Figure 142

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

Name	۲	Emp. Status	۲	dot	۲	# Clients	۲	Active	۲	Deactivation Date	۲	External Code	۲	Actions
Blooth, Franklin		PartTime		Floor Scrubber		0		100	-			JonMgr-3963		0 ×

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.

ITORIAL MANAGER	Acco	unt + Scorecard +	Inspections •	Work Order *	Clients *	Inventory *	Employees	· Curck Search
Man - Christian - Strategy								
Employee Trac	sking							
Net 2014	Engineer of Deployees							
	and all the tradechilds							
Events By Month								
1 - 1								
0 - 11	Jur 14 Pal-14	Barta Artis	Mar Tá	34174	.04.15	Aug 14	Deg '14	Dr W
Marette Ad Vege	•	(sport	 Alfanzlanze beise 	 # 311 Parture 	umor (recurso			
a a 🚺 2 Drag a column header	a a bail of a best	Export per supe hat polyme					14 1947	
a a 🚺 2 Dag a column header		Export over onge har zelumo	 Heritaria incol Event Type 		unte texcee scription		e N	
a a 🚺 2 Dag a column header	a a bail of a best	(opert per pope her solution @ Date @		e De				ates
= + 1 2 Drag a column header Name	a 12 break by the second se	(opert per pope her solution @ Date @	Event Type Receptor	@ De	scription		Pla	
n n 1 2 Drag a splaren header Name Balt filam	a 10 brown in proceeding the second secon	(sport processor het column (*) Date (*) 25/0014	Event Type Anopolius Anopolius	g De Iry Iry	scription Rynahoard		Pla	ites in Charver of the V
n 4 2 2 Drg a starm heater Name Balt/Itale	A 10	freport per segn tet aptemo (*) Date (*) 50/05/05/4 60/05/05/4	Event Type Anopolius Anopolius	(e) De Try Try	actiption Rymheard Rymheard	nations	Pla	ites in Charver of the V
n a 2 Dag a store bester Name Bolchion Bolchion	Al 10 International and along it have to grow to the to grow to the to grow the the to grow the the total and the total and the total and the total and total	freport per segn tet aptemo (*) Date (*) 50/05/05/4 60/05/05/4	Event Type Receptor Receptor Receptor Schetomarca	(e) De Try Try	scription Rysolvard Rysolvard Rysolvard Londouton - F	nattaning	Pic and	ites in Charver of the V
n n 2 Dag a strium heater Name Balt.Mass Balt.Mass Balt.Mass Balt.Mass Balt.Mass Balt.Mass Balt.Mass	A 10 Income A free to prove by the A free to prove by	freport per segn tet zakures (* Date (*) 51/23/0014 51/23/0014 51/23/0014	Event Type Receptor Receptor Receptor Receptor Receptor Receptor	g De try try try try try	scription Rysolvard Rysolvard Rysolvard Londouton - F	Instituting	Pic and	ites in Course of the b fixed!
a a 2 2 Dag a stiuren husate Name Balt.Huse Balt.Huse Balt.Huse Danzy.Lesti Tenny.Lesti	A 10 Income and since it have to prove by the Annager Di Lumbergh Manager Find Santon Gente Manager Find	Inport processor ter column (*) Date (*) Date (*) (*) (*) (*) (*) (*) (*) (*)	Event Type Incoprise Incoprise Incoprise Incoprise Incoprise Recoprise	g De try try try try try	scription Symbol		Pic and	ites in Course of the b fixed!

- 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.

JANITORIAL MAN										
Employee Track	king									
1885 2014 ·	Employees All Employees	oyees								
Events By Month										To
-	17									
2										
Dec 13	Jat '14 Fab 1	4 Ma	r14 Apr14 # Awards	May'14 # Atlandance Issues	Jun '14		Aug 14	Sep 1	4 00'14	H0y 14
Month: Al Year	-	• Expo	et l							
1414 1 21	10 .	deres per	2009							/ 15 Tar
Drag a miumn header a										
Name	Manager	۲	Date 🛞	Event Type		Description		۲	Notes	
Bob Hope	Bil Lumber	ph.	01/29/2014	Recognition	1	EmployeeAward		10	Floor Cleaner of the Month	ħ
Bob Hope	Maruger Fr	90	02/05/2014	Recognition	1	EmployeeAward		1.5	sodfsad?	

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**.

ID	1		THE REAL PROPERTY AND INCOME.			100 million - 100 million - 100 million	
			REAL M	marit Dente	transmy+ Ma	april Drampsel # Data	Seech.
JANITORIAL M							
Employee De	tails						
the thirpings to very	al internation in a p	with strateges.					
Ourge Dratoyee	topa, Bate						
Detain Chains	Anna Abard	And Interior 1	A Participant Instants	Partners in the second			
General Inform	ation			Address inform	atlan		
Name		55N	Birth Date	Street Address			
Bell High		***.**.****	9/25/0013	CHy	State	Zip	
Seep. Rot. 1d	Jude Classe	Blottes	Status Effective				
131	River Statute	Parttine	10/070/0201-0	Contact Inform	rtion		
Here Data	Hearty Wege			Hume Phese	Smail /	Address	
9/25/2013	\$8.00			Cell Phone		t Nethod	
Notes				Imargancy Cont	CriwPa	010	
				strangently conte	and the second		

Employee Details

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

JM	104	Account •	Scorecard • Imp	ections • Work Order •	Clients • Inven	tory • Employees •	Quick Search	
Employee De				•				
	e all miormatton on a spec	-						
		one employee.			2			
hange Employee	Hope, Bob		• Onlit		•			
Details Clarge	Awards Attende	an bucherin July Pa	charmanue incidents i the	memarica Revolution Time		3		
General Inform	ution			Address Informa	tian			
Name		55N	Birth Date	Street Address				
Bob Hope		***.**.****	9/25/2013	#353 Stone Back Str	ream Circle			
1.55059760				City	State	Zip		
Emp. Ref. 5d	Job Class	Statue	Status Effective	Stepford	67	32565		
133	Floor Scrubber	PartTime	9/25/2013		A1957			
Hire Date	Hourty Wage			Contact Informat	tion			
9/25/2013	\$8.50			Nome Phone	Email Address			
Notes				(231) 658-5188	support@janitorial	imanagec.com		
Neites				Cell Phone	Contact Method			
				(255) 452-2545	OfficePhone			
				Emergency Contact	t Notes			

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.

	Account *	Scorecard •	impections *	Work Order •	Clents *	inventory *	Employees *	Quict Search .	Q.
mployee Details a the page to view all information on a specific ample ange Employee — Hope, Bob		() tilt							
Details Cherts Assard, Attantional Autor	m Las Pertan	serve incidents	Performance B	anayous Tarme		/	1		2
Initialis Cherits Americk Attendence Initiali	rm Sole Partier	unu in danta	Petformance N	anzenne. Tarras		/	Actions	/	
Detail Clerits Asserts Attendence incider Client Information	ms . and Dectors	und its date.	Petformance N	Intervis Titrat	/	/.	Actions	/	2
Detail: Clarits Americ Attendent builder Client Information Name AMM Test Client	mak betas	nero e tru derta	Petformance N	Trained?	/	/	LICENSIN /	/	

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".

NTORIAL MANADER		Account *	Scorecard *	Inspectio	vis • Work Order	Clients *	inventory *	Employees •	Gailà Se	ett.		Q
mployee Detail or this page to view all in hange Employee	formation on a specific emp	_	⊖ Edit	1								
			ormanica localmenta	Perform	natce Reviews Cher			<u></u>	I New Rec		en Event	
	Manager	🕑 Түр	•	Peder	Letter?	Notes		<u></u>	I New Rec		on Event	
			e Ition	Perferr			deaning	<u></u>			en Event	-
Date (Manager	Typ Promo Emplo	e Ition	()	Letter?	Notes Superior	deaning		🛞 Actio			-

Employee Awards and Recognition

- 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

JM		5 73	12 42	N S				1 2 2	161 3		1 500	et fr	in c
PETORIAL MANAGER		Account *	Scorecard *	inspecto	ons * Work Order *	4	Clients *	inventory *	Employees *				
mployee Details													
	mation on a specific employe	5											
hange Employee Hope, I			• @ Edit										
Details Clarity Aw	and Minninese insuberts	lubra	formance Incidentia	Decher	manus Reviews Time								
thermal Provide New													
									۲	Add Nev	w Reco	epitto	es Event
Date 🛞	Manager	⊛ Ту	pe	®		œ	Notes		۲		w Rece Actio		es Evenit
Date 🛞	Manager Manager Fred	-	pe notion	۲		۲	Notes Superior clear	ing	۲				es Evenat
n an iman in		Pruo		۲	Letter?	•		985 - C	۲		Actio	ns	

Figure 150

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

Add Recognition Event	ŧ.	4	3
Employee	_	Event Date	
Bob Hope	1	2/23/2016	m
Manager /		Letter issued?	
Choose Manager			
Туре			
Choose Type		2	
Notes			
5	© Save	Cancel	

- 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.

												Link O
NITONIAL MANAGER		Account *	Scorecard •		Work Order	• Cients •	Inventory *	Employees *	Could be	arch		٩
mployee Deta												
at this page to view all	information on a specific e	mplayee.										1
hange Employee Ho	pe, Bob	2.4	(7) Edit									-
											1	
Details Chevra	Awards Attendance in	addents ico Porto	manor mode								hecident	
Details Church	Awards Attendance in	odests ico Porfo		Action Taken	lavens Ta	Letter?	Notes				hucidaent	
Details Chants	Awards Attendance in	addents ico Porto	en ander P				Notes				tocideent	
Details Claims	Amendance in Manager	noderes soo Porto	emanor mode en	Action Taken		Letter?	Notes Jugu junk	;)	🐑 Acti	ons	-	

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.

mployee		Incident Date		
lob Hop 1		2/28/2016	m	
danager		Lotter haued?		
Choose Manager	•			1
ncident Type		Action Takan		
Choose Incident Type		Choose Action		
lotes				3
2			10	
			_	

Add Attendance Incident

- 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.

		Act	* huo	Storecard +	Impection	s • Work C	indar 7	Clants.*	inventory •	Employees *	duc	k beaut	_	٩
mployee D	etails			1								4		
ie this page to xie	eer all information on a	pecific employee.	-			2)					1		
and the second second second				ATT A DAMA MADE								-		
unge Employee	Hope, Bob			⊙ tall	-							<u>۱</u>		
Distante Chier	1 alfol with	dunce Incidents	Job Perto	The second second	Perform	ance Reviews	Time	02						
	1 alfol with	dance Holdents	Job Perto	-	Perform	ance Reviews	Ner	0			۲	Add Ne	w toolder	
	1 alfol with	fance Holdents	Job Perto	-	Pectorm	unce Reviews Letter?	New ©	Notes			-	Add Ne	1.1	/
Details Cher	ti Awanti Aber		÷	ormance incidents	Pertorm		۲		thing on the job		• /		1.1	1

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.



Employee Performance Reviews

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

ANATORIAL MANAGER selenge contails termployee Details termployee Details termployee Details termployee Details Terms Engage to view all information on a specific amployee. Narge Engage ender Entry	J	VI.		Acount So	recard + Cherts + Inver	tory • Ma	nagers Englis	Chikk Seinth.	0
An the page to view all information on a specific employee. Anage Enviroyee Patcher: Retrif Outrie Avante. Attendence Incounts too Performance Reviews Veal © Status © Schedule Date © Discussion Date @ Manager 2013 Draft 12/06/2013 Bit Lumbergit									
An the page to view all information on a specific employee. Anage Employee Restar: Restar: Restar: Attendence Incomes to Performance Researce Outcom Owner: Awards: Attendence Incomes Performance Researce Veal © Status © Status © Status © Actions 2013 Draft 12/06/2013 Bit Lumbergh Bit Lumbergh	mployee	Details							
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2013 Dreft 12/08/2013 Bit Lumbergh			endence incolenta 300 Refor	nance incoherts	Performance Reviews		_		Ĩ
			entensi Incienta Inc Perfor	mance incodents	Performance Reviews		٩	Manage Performance Review	-
2014 Draft 01/27/2014 Bil Lumbargh	Details C	Awards Add					And a second a	Line ONCOME	-
	Details C	ente Asarda Att					Manager	Line ONCOME	 -

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.

JM	Assort	Survey + Co	etter (huantary e	Managers	Emangent • Guild South- Q
JANITORIAL MANAGER					Petersana Nexes D
Employee Performance Reviews This page displays all employee reviews in the salected					Bothdays Autore Lipt Terremand Lipt
West 2014 • Annuessey Month Decem		nyee, Detries, Feich			Employee Docaris Managa Employees Managa Performance Dimensions
Timing 🛞 Name 🛞 A	knowersary ®	Status 🛞	Schedule Date		Managa Init CasaBrations
On-Time Repher, Resth	2/08/2000	Druit		01/27/2014	Imperiation (Qrease)
14 14 1 14 14 1					6-Cuttines

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

mployee Performance Reviews			0
114 Annual Review		8	See < lack
ngloyee Hire Date Actual Stars: \$276/2013	Follows Direction Employee completes tasks as assigned and meets subly standards	NotReted	
aview Schedule Date Review Manager			_
ccomplitionants	No Spec Left Behind Exception effort to remove all evidence of dief	NetRated	-
ngroventuet Opportueities	On Time Coase the employee consistently show up for west on time?	Netfated	-
Current Wage New Wage Effective Date	Appendiece Englisises follows company divise sode iterateds	NotFasted	NotRated
51.00 2			Good Acceptable Unacceptable

- 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

JM	Arguent Sconsord + Clients + Inve	mtog • Hanagans	Employee •	Quick Search	Q.
ANITORIAL MANAGER			Partornance Rev	lews r	
Employee Tracking			Anni-Anni-Anni- Buthdays Autore Liet Terminanal List		
Events By Month			Employee Datalis Managa Employe Manage Portinen Manage Job Clea Import	nei anna Dreseritore	Toggle
Dec 13 Jan 14 Feb 14 Mar 14	Apr'14 Bay'14 Jun'14 Jul' Awards in Aberdance Issues in Juli Performence Issue		5ep 74	Oct 14 Nov	

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.

	1								Welcarre,	demonser 148.2
			Account	Septemand *	Clarifi *	Investory #	Managers	Empleyees +	Carlok Se	e.n. d
	rformance Revi	ews								
this page illupiters all	arryllayae oncinces in the o	disched pear.	_							
Year 2014 +	Anniversary Month	Dacamilier .	Emplo	yee All Employee	6					
14 14 1 4		na per peur								$\lambda = 0.01 \pm 0.01 \pm 0.01$
Timing	Name	Anniversary		Status		dule Date		Manager		Actions
On Time	Coldstation, Johns	10/17/2010		Durt			81/16/2014	Bill Lutthergh		(2.5.6)
On Time On Time	Colloutin, John Flebchier, Flebch	12/17/2013		Duft.				Bill Lumbergh Bill Lumbergh		() fait
199 CONTRA	CONTRACTOR CONTRACTOR						01/22/2014			
On-Time	Pletchist, Fletch	12/08/2000		Duft.			01/22/2014 05/25/2013	Billumbagh		⊗ Ldt

- 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

	ANAGER		Access Tores		Cierci y	ventary •	1.fpr	name (In		entit.	100.1
Employee An											
CAND BE AND STORE	layet anniversaries during th										
Musthi Decayiber	* Export Q Pi										
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Diag a culumo heade	r and drop it have to group by	that column									
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	12/06/2013	34	2 Bold's Your Unde Lane 21 Cheers Blud		Bittadary Button	AK MA		44441 14540	056-009-4858		
Flatchar, Flatch									056-009-4058		
Halahar, Flahch Matoria, Sara	12/06/2013								856-889-4858	294-777-846	
Elatohan, Elatoh Matoria, Sara <u>Presteo, Jamie</u>	12/06/2013	1	21 Cheen Bi-d		Suton	MA		14540		254-777-896	
Halohar, Flatch Malonis, Saro Breaks, Jamie Senith, Tommy	12/06/28/3 12/07/28/3 12/07/28/3	3 1 3	21 Cheen Bud 7 Mahagma Bat		Suton	MA		14540 13346		294-777-88	

Figure 161

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

Employee Birthdays

									Web	-	fame-aar	144.05
JANETORIAL MANAGER	Access	Internet *	Cherth *	Ince	*	Manage	n 1.		• 00	ci 5+1	de-	0
Employee Birthdays This list shows all amplitude lathdays during the salested month.												
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Drag a column baselier and drag it have to group by that column:												
Name @ Birth Date @ Hire Date @	Years g	Address	@ Oŋ		State		Ziρ		lome		Cell	
Seven, Torong 86/07/2013 12/05/2013		7 Mahagma Rd	pas	spie	TN		33345	2	ap. 177-245	8	256-777-8	-
and a second											1-14/14	

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

Active Employee List

	A											Welco	ome, demouser	104.0
				Accesent	Scienced •		leits +	Inventory	• Mar	agers)	Employees •	Quite	h Seirith	Q
Active Employe	ees													
The following list shows o	all active employee	**												
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and the second distance of the second se														
	+ 10 +	(darter)	per page										1.556.05	terra.
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an e 1 e Drag a column header a	nd drop it here to	group by	y that column		City		State		Zip		Home			
 a column header a Name 	nd drop it here to	group by		e	City		State	۲	Zip	۲	Home	۲	1 - 10 of 10 Cell	
	nd drop it here to (e) Years 1	group by	y that column Address	e				۲	Zip	۲	Home	۲		
	nd drop it here to	group by	y that column	e	City Wittlesburg	۲	State AK	۲		8	Home	۲		
	nd drop it here to Years 1 54	group by	y that column Address	e				۲	44621	8	Home	۲		•

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

										demouser	LEE DA
	Access	Scitica	d+ Class	• Investory	•	Managint	Engl	layans + 2	Soick Ser	rð.	Q
Terminated Employees The following list shows all terminated employees. Export Q. Part											
a a 1 a a 10 a housesse										6-6/0	
x x 10 * here, propage Stog a colume, header and drop it here to group by that colume										690	
Drag a column header and drop it here to group by that column	Address	e 0	ay e	g State		Ζφ	۲	Home		Cell	
Drag a column header and drop it here to group by that column Name . Termination Date .	Address 1 Sequent at		Ny G	9 State	۲	25p		Home 213-232-234	۲		

- 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

						Welcome, demouser	Los De
		Account Scorecast	Cletter:	Inventory • Managers	Englopers +	Child Series	Q,
ANITORIAL MANAGER					Tracking Performance Re Anniversation	ania la	
Employee Details					Erftidays.		
					ActiveList		
Use this page to view all information on a q	recific employee.				Territubed Col	0	
Overge Employee Coltostal, John					Employee Ortal	•	
Details Charits Asserts Atlan	terris becklinis — bill Parkers	una bildadi - Patama	na faviers		Manage English Manage Perform	nance Deterministers	
General Information		A	ddress inform	ation	Adamage July Cla	auto plane	
Name	SSN Birth	Date 5	treet Address		Import		
John Colduates	12/18	(2013 0	ty.	State	Zφ		
Emp. Ref. M Job Class	Status Statu	a Effective					

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

JM		Accust *	Seprecard *	Imperitors *	Work Order *	Cierra +	inventory *	Employees.*	Quick Swarch	u <u>e</u> 0,
Employee De	etails									
One this page to view	wal information on a specific w	rgshtiyeni.								
Change Employee	Blooth, Franklin		Coline I							
	MILLION THREAD									
Details Clien	Bana, Sanny	inar	ce locidents	Performance Beak	zes Tere					
General Infor	Coktoutin, jofee		1	Addr	ess information	tá.			- 51	
Name	Employee, Dien 1.		th Date	Stree	rt Address					
	Fletches, Reb/h		and a second second	wdgw	al					
Franklin Blooth	Hatley, Ed	35/	1/1970	City		Stat	3	Zip		
Emp. Ref. Id	Hope, Bulli	34	atus Effectivo	Hurts	dire -	AL.		35803		
	distantia, Washington		20/2016	(the second s	10.2012	- Care - I		336922		

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.

	Acobu	ent + Scoverand +	Impections *	Work Order +	Cients *	Weinstory *	Employees #	Guide Scarch	Q
Employee Details									
Ose this page to view all information on a spe	cRic employee.								
hange Employee Blooth, Franklin		/ 641							
Details Clients Awards Attend	ence Incidentia Inh Perl	formance Incidents Pe	clormance Retream	Tima					
General Information			Addres	s information				+	
Name	55N	Birth Date	Street A	ddress					
Franklin Blooth		6/1/1970	wdigwd						
			Citty		Statu		Zip		

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.

Account * Storecard * Impections	Work Online +	Clients * Inventory *	Employees *	Guick Search	ue o
Employee Details					
imployee now listed as trained for this client.					
One this page to stew all information on a specific amployee.					
Change Employee Riosth, Frankler + / Edit					
Details Clerits Awards Alternative incidents Isla Performance incidents Performance Re	siews Time				
Distails Clients Awards Alternations incidents Job Performance incidents. Performance ite	whereas Time				_
	1 - 2 - 6 - 12	Ŧ	Actions		T
Client Information		Ŧ	Actions × Remove		T
Client Information Name 1	r Trained?	Ŧ			T

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.

JM	Account # Scorecard # In	poctions * Work Order * Clients *	Inventory V	Employees * Quick Search	HALT C
Scorecard	• O Befreih			Tracking Performance Besteam Aneriwersaries Birthdays	
Summary - January 01, 2014 th Income vs. Expenses For January 01 2014	rough December 31, 2014		() Expe	Active List Terminated List Translayee Data	-
Least Profitable	Experime Development	Profit/Loss \$250.000		Manage Employees Manage Performance Dimensions Manage Job Classifications	
Iaron's Cakes \$271.52 Top-Sheft Driving School \$316.40	Here Labor	\$200,000 \$190,009		Managers Generic import	

Figure 170

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

JM		Account +	Seprecard *	Imperitors *	Work Onlar +	Circra +	Inventory *	Employees.*	Durch Swatch	Lug O
AMETORIAL MANAG										
Employee De	tails									
the this page to view	v all information on a specific er	rgibliyeed.								
Change Employee	Blooth, Franklin		Collis							
Details Clien	Blooth, Flanklin		on horeholder	Performance Besic	ties Tiese					
County County	Bana, Sanny	the second	ce locidents							_
General Infori	Coktoutin, Joho		1	Addr	ess information	tá -			- 62	
Name	Implayee, then L		th Date	Stree	rt Address					
1000000000000000	Pletches, Retch		a hérdenek ti	wdgw	et.					
Franklin Blooth	Hatley, Ed	- W	1/1970	City		State	1	Dip		
Emp. Baf, Isl	Huge, Bulk	54	atus Effective							
	The state of the s		20/2016	Hurts	vene .	AL.		35803		

Figure 171

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

	Account	nt + Scornged +	Impections #	Work Order +	Cierris *	Inventory *	Employees #	Guidebourds	Ug DA
Employee Details									
Use this page to view all information on a spe		1.000							
Change Employee Blooth, FrankEn		/ 661							
Details Clients Awards Attend	lance incidents	nrmance Incidents	Performance Rester	an Time					
General Information			Addre	ess information	i			-	
Nama	55W	Birth Date	Street	Address					
Franklin Blooth-		6/1/1970	wdqwr	1					
Erros, Rafi, Id Job Class	Status	Status Effective	City		State	<	Ζip		

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.

	Account Scotecard	Clents Inventor	y • Managers Employees •	Los
Employee Details Use this page to view all information on a specific employee. Change Employee Coktostin John •				
Details Clients Awards Attendance Incidents Job Perfor		ance Reviews	-	
Name	۲	Trained?	Actions	۲
ACME Wholesale		Not Trained	Show items with value	that:
Anne's Annory and Sub Shop		Trained	[F]is true	
Big Guns Gym & Pet Grooming		Not Trained	ls faise	
and once offer or endowing				
Good People Brewing Company		Not Trained	Filter Clear	till -
		Not Trained	1	

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.

JVVI				Account # Scim	ecard #	spirations *	Work Ords	e * - Oliest	1.4	Inventory v	Employees #	Guick Search	0
Active Employ	ees	acupitoyoon.									Tracking Performance & Anniversaries Birthdays	evienes.	
Esport @Prim											Active List	-	-
0 :		+ 3	0 1	items per page							Terminated List		6 itern
Drag a solume houster	and they i	there is grou	a by th	ut column							Manage Emplo		
Name	٣	Years	Ŧ	Address	۲	City	τ	State	τ	Zip	Manage Perfor Manage Job Ca	mance Dimensions	Ŧ
Blooth, Franklin		л		weigwei		mantpelle		AL.		35803	Managero		22
Bono, Sonta		t		2525 South Street		Hustsville		Al.		35805	Generic Import		42
Contortin, John				5250 South of Here		Somesiatch		MN		56526	Chronotek Imp	on	



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

		Account + Scorecard	•)(1	npactions * Work	. Onlo	e + Clier	(*)	Truentury	•	Employees #	Girkk	laweb	laci e
Active Employees													
te for swork tail griwmlich ed	ctive amployees.												
Esport #Print													
0 2	+ + 10 ·	· items per page										1 - 10 of 16 8	berns.
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Name	T Years T	Address	Ŧ	City		State		Zip		Home	Ŧ	Cell	1.14
			. т		· T		<u>_</u>		ιŦ.		- T.		- 23
Stooth, Franklin	0	wdqiad		Hustodile		AL		35803		(222) 222-2222		(222) 222-2222	
Seno, Senny	1	2525 South Street		Hustoville		AL.		35801		(222) 232-2222		(234) 234-2342	
Coktoutin, John	1	5210 South of Here		Samopatch		MN		56520		(545) 885-8525		(545) 665-6237	
Employee, Ellen J.	2												
Fletcher, Fletch	16	2 Bob's Your Uncle Lone		Wittlesburg		AK .		44441		(256) 526-0522		(256) 999-8877	
House, Bob	1 C	4353 Stone Rock Stream Girdle		Stepford		CT .		32565		(231) 655 5166		(255) 452 2545	
Hustable, Theodore	¥.	10 Stigwood Avenue		Brooklyn Heights		NY		53535		(256) 698 3333			
Malone, Sem	1	21 Cheers Blott		Bortun		MA		34545		(656) 1889-4858		(565) 656-6022	
President, Larris	1 A	2525 Rama Lane		Camden		NV		52352		(299) 535-5542		(526) 525-6056	
Sealth, Timory		7 Mahagma Bil		pascagala		TN.		33345		(256) 777-3453		(256) 777-8909	

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.

JM	Account # Scim	card.v. impections	• Week Onlar +	Clents *	Investory #	Employees *	Quick Search	Los De
NATORIAL PLANASER					Cost vs. Budge	et Explorer		
				-	Manage Suppr	ters .		
Scorecard			-		Manage Supp	ly Items		
konstand: All Chenthe 2014	* C Rafre	uh.			Oknierie Suppl	y Item Import	Litt X Osista	
Summary - January 01, 2014	through December 31, 2	014			Manage Supp		Print Q Detail	
Income vs. Expenses For January 01 24	014 thru December 31 2014							
Least #rofficable	Expense Breakdor	m.	Frof	vices:				



The current list of suppliers will be displayed.

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Name	Ŧ	Invoices	т	Supply Items	Ŧ	Active	т	Deactivation Date	Ŧ	Actio	ns
Notr's Supplies and Shift		n		14		Yes				1	8
Supply Suppliers to:		0		6		Yes :				1	183
Surplus Supply Supplier		.0				Yes				1	H
Wal-Mart		0				Ves				1	
Sent Supplier		0		50		See				1	
Envice		0		14		Yes				1	121

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.

JM	Account # Scinecard	impections *	Week Onlar +	Clients *	Investory *	Employees *	Chink Search	Lust D
ANTURAL PLANASER	Linewooder of Advision				Cost in Budg	et Explorer	1. Street and a second second	
				-	Manager Suppl	daine .		
Scorecard			-		Manage Supp	ły Items		
Scorecard: All Climits 2014	+ C Refresh				Okonierie Suppl	ly Item Import	Litt X Oslata	
Summary - January 01, 2014 t	hrough December 31, 2014				Manage Supp	бу Окаден оптар Рыла — 😝	Print Q Detail	
Income vs. Expenses For January 01 20	14 thru December 31 2014							
Least Profitable	Expense Breakdown		Frafi	(Auss)				

Figure 178

The current list of suppliers will be displayed.

Supplier Maintenand											
lue this page to manage all supp											
itow All Suppliers 🖂								New Supplier			√.Sev
Oring a column header and drop	It here to g	ogs by that colores									
Name	٣	Involces	Ť	Supply Items	٣	Active	Ŧ	Deactivation Date	Ŧ	Action	5
Bob's Supplies and Stuff		0		14		Yes				1	
Supply Suppliers Inc.		0				Ves				1	82
Surplus Supply Supplier		н		u		Tes			-	1	*
Wei-Mart		0		. 6		Ves		-		1	н
Test Supplier		0		Ú		Neg				1	×
EastCo		0				Yes				1	1

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.

	Account # Scinecard #	impections +	Work Onlar +	Clients *	Investory #	Employees *	O.M.A.	Searchill	0
ANTORNAL PLANASER					Cost vs. Budge	t Explorer			
				-	Manage Suppl	lers .			
Scorecard			-		Manage Suppl	y Items			
Scorecard: All Clients 2014	* C Refrech				Generic Suppl	Poqeil mail y	tite 1	N Osista	
Summary - January 01, 2014	through December 31, 2014				Managa Suppl	у Usage Итари 😝	erist (Q. Detail	
Income vs. Expenses For January 01 24	114 thru December 31 2014								
Lewst #rofitable	Expense Breakdown		Frofit	dime.					

Figure 181

Select the Manage Suppliers tab from the dropdown list.

The current list of suppliers will be displayed.

UNTORIAL MANAGER			Account *	Scorecard * impr	Jetions +	Work Order #	Clients	 Inventory * Employees 	Curch Seriels.	9
Supplier Maintenance										
be this page to manage all supple	n.									
now All Suppliers 🖂								New Supplier		
Orag a column header and drop it	here to gr	ings by that columni								
Name	Ŧ	Involces	Ť	Supply Items	٣	Active	Ŧ	Deactivation Date	Y Actions	
Bob's Supplies and Stuff		0		14		Yes			10	č.
Supply Suppliers Inc.		0		- 10		Ves			80	ũ.
Surplus Supply Supplier						Yes			110	8
Wol-Mart		0		. 6		Yes		-	1.	Ū.
Test Supplier		0		Ú		New			2.5	
Canto		0		1		Yes			10	ŝ.
1112 👩 1 Fat										(diterris

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.

JYYI			Account +	-500	reçavit +	I	npections +	Work Grider	* Clen	U. + · I	Inversory *	Employees *	Dailt feel	ih	Q
ANTORIAL MANABER											Cost vs. Budge	rt Explorer			
											Manage Suppl	liets			
Supply Item Ma	intenance	e									Mininger Supp	ly thema			
Use this page in manage-	all supply dam	5						-	_		Generic Suppl	Hom Import			
Show All Supply Norms	ę.						-				Marrage Supp	ly Unage	+Ad	d New S	upply Item
Depart to Excel															
Drag a solumn header an	d dogs it here	to greep by that color	÷												
Name		Description			C.,		Supplier	-	Unit C		Mar		T Act	1210	Actions

Figure 183

The current list of Supply Items will be displayed.

	Account *	Sconscard *	Imprictions * Work Ord	ler * Clients *	imentory *	Employees *	Quint Search		0
upply Item Maintenand									
his this page to manage all supply iter	nı.								
Now Alt Supply Items							+ Add New	e Supply	-
Export to Excel									
rag a column header and drop it here	e to group by that universe								
Name T	Description T	С. т	Supplier T	Unit CT	Маг т	Pap., T	Act T	Actio	ns.
Alpha Clean Scrubbing Staff - 1 Gal	Alpha Clean Scrubbing Stuff - 1 Gal - ea		Bob's Supplies and Stuff	\$14.99	\$0.00	Re	7014	1	я
Analy's Famous Paint Remover	Anity's Famous Paint Remover		Surphis Supply Supplier	58.54	50.00	Ne	Nes	1	
Васк Өгәсе	Back Brace		Bob's Supplies and Stuff	525.00	\$0.00	180	Yes	1	×
Droom	34 in push tiruom	12345	Wai-Mart	\$6.50	50.00	No.	744	1	×
aroom - 48° Push	8room-48" Pish		Bob's Supplies and Stuff	522.00	50.00	1944	7010	1	×
Buffer - 100009M - 18* Clarke	UP" Electric Ruffer - 1000RPM - Clarke	25658	Rolt's Supplies and Shaff	\$5.25	50.00	Vear	Tes	1	
Buffer Pad Black	Buffer Pod - Black - na		Supply Suppliers Inc.	\$7.99	50.00	No	70.0	1	×
Buffer Pad - Green	Green Buffer Pad		Surplus Supply Supplier	\$6.00	\$0.00	No	364	1	13

Figure 184

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

Add New Supply Item	×
Supplier Wal-Mart	Is Paper Item
Name	Description
Broom	24 in push broom
Code	Unit Cost
12345	5.35
	Save Cancel

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.

ANTORIAL MANAGE			Account +	- 24/01	eparit e	implect	even a	Work Orde	* CSen	(a	Invertory * Cost vs. Budg	Employees #	Daini fee	1.5	c
											Marrage Supp		-		
Supply Item N	laintenanc	e								-	Minnage Supp	Ay mema			
Use this page in many								-	-		Generic Supp	item import			
Show All Supply Items	G						-				Marrage Supp	fy Usings	+44	id New Su	oply Iten
(i) Export to Excel															
Drag a solurin header	and drop it here	to group by that color	Tari												
						1.00			Unit C		Mar				

Figure 186

The current list of Supply Items will be displayed.

JM	Account +	Scorecard •	Inspections * Work Ord	et + Clents +	Inventory *	Employees *	Quick Search		q
Supply Item Maintenand te this page to manage all supply iter have AE Supply Items							+ Add Iter	w Supply	ltem
Depart to Escel									
Dag a column beader and drop it her	e to group by that column								
Name y	Description T	C	Supplier 🕆	Unit C T	Mar	Рар., т	Act_ 7	Actio	00
Alpha Clean Scrubbing Stuff - 1 Gal	Alpha Clean Scrubbing Stuff - 1 Gal - ea		Bob's Supplies and Stuff	\$14.99	\$0.00	No	Ves	1	*
Andy's Famuus Paint Remover	Andy's Tarrosa Paint Barrerver		Surplus Supply Supplier	58.54	\$0.00	No	Yes	1	×
Back Brace	Back Brace		Bob's Supplies and Stuff	\$25.00	50.00	No	Ves	1	×
Broom	24 in push becom	12945	Work Mart	\$6.50	\$0.00	80	Yes	1	×
Broom -48° ≇uah	llroom -48" Push		Bob's Supplies and Staff	\$22.00	\$0.00	Har	Vina	1	×
Buffer - 30008PM - 38" Clarke	18" Electric Buffer - 10000PM - Clarke	25658	Bob's Supplies and Stuff	\$5.25	50.00	80	Yes	2	×
Buffer Pad - Black	Buffer Pad - Black - to		Supply Suppliers Inc	\$7,99	50.00	910	Ves	11	я
Buffer Pad - Green	Generi Butter Pad		Surplus Supply Supplier	S6.00	\$8.00	No		1021	

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.

Edit Supply Item		×
Supplier		Is Paper Item
Wal-Mart	•	
Name		Description
Broom		24 in push broom
Code		Unit Cost
12345		6.50
	⊙ Save	Cancel

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.

JM			Account +	Scorecasi	•	implections +	Work Order #	Client		Invertory.*	Employees 1	. Date t		ua bi
ANTORIAL MANABER										Cost vs. Budg	et Explores			
									=	Names Surg	diats			
Supply Item Main	tenance	e							-	Mininger Supp	Ay thema			
Use this page to manage all	supply dam	5-					-			Generic Supp	is item import			
Show All Supply Items						-			4	Marrage Supp	fy Usage	+	Add Ne	w Supply Item
(i) Export to Excel														
Drag a solumn Newley and	drops it here	to group by that colu	mi											
Name	-	Description		T C.		Supplier		Jnit C		Mar	· Pan	T Act		Actions



The current list of Supply Items will be displayed.

	Account =	Sconcard *	Impections * Work Onl	er + Clents +	Inventory *	Imployees *	Quick teamhi		0
upply Item Maintenand									
se this page to manage all supply for	m.								
Now All Supply freme							+ Add Nev	e Supply	iten
() Export to Excel									
Wag a column header and drop it here	e to group by that solution								
Name T	Description T	C T	Supplier T	Unit C T	Mar T	Рар. т	Act T	Actio	ans
Npha Clean Scrubbing Staff - 1 Gal	Alpha Clean Scrubbing Stuff - 1 Gal - en		Bob's Supplies and Staff	\$14.99	\$0.00	No	144	1	×
Andy's Famous Paint Remover	Andy's Ferrous Paint Remover		Surplus Supply Supplier	58.54	\$0.00	No	Nes	1	×
Back Brace	Back Brace		Bob's Supplies and Stuff	\$25.00	\$0,00	No	Tes	1	×
Broom	34 in push laparn	12345	Wal-Mart	\$6.50	\$0.00	No	Not	1	×
Broom - 48" Push	Broom - 48" Push		Bob's Supplies and Stuff	522.00	50.00	190	.701	1	×
Baffer - 1000RPM - 18* Charlee	18" Electric Buffer - 10000PM - Clarke	25658	Bab's Supplies and Stuff	\$5.25	\$0.00	Ne	Tes	1	×
Baffor Pad - Black	Buffer Ped -Black - oa		Supply Suppliers Inc.	\$7.99	\$0.00	760	849	1	×
	Green Buffer Pad		Surplux Supply Suppler	\$6.00	\$0.00	140	Tes		×



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.

Scorecard Scorecard: All Clients 2014	Inder * Clients * Inventory * Managers Employees * Quick Search C Cost vs. Budget Explorer Manage Supply Items Generic Supply Items Generic Supply Urage Manage Supply Urage Manage Supply Urage
Summary - January 01, 2014 through December 31, 2014 Income vs. Expenses For January 01 2014 thru December 31 2014 Least Profitable Expense Breakdown Add. Svca. Misc. M	Manage Supply Usage
Income vs. Expenses For January 01 2014 thru December 31 2014 Least Profitable Expense Breakdown Big Government Contractor, Inc (\$1,257.88) Mile	rexport to PDF
Least Profitable Expense Breakdown Big Government Contractor, Inc. (\$1,257.88) Misc	
Big Government Contractor, Inc. (\$1,257.88) Mise	
Big Government Contractor, Inc (\$1,257.88) Misc	Profit/Loss
Jane's Cakes S109.66 Top Shelf Driving School S154.22 Cheese Factory Inc S463.36 Insurance Paper	\$200,000 \$187,708 \$180,000 \$ \$160,000 \$ \$140,000 \$ \$120,000 \$ \$120,000 \$ \$100,000 \$ \$80,000 \$ \$20,000 \$

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**

		Account * So	orocant *	Inspections * Work Order *	Clients * inventory * Emplo	peer */	Land C
Supply Usage Maintena							
the this page to manage supply usage Seat	records. So add		t the lot.				
Filter Clertt	* 01/14/		038	g O Refresh + Add			
Client	Ŧ	Dete	τ	Items 7	Note Y	Actions	τ
Big Government Contractor, Inc		83/34/2016		Cost: \$31.50 flams: 2		Ø / × Ə	
Bank of America		03/11/2016		Cost: \$152.54 mems: 4		21 / × 8	
Anne's Accounting Service		131/09/2038		Cost: \$73.53 News: 3		Q1 / × Ə	
XiMation		01/09/2038		Cizif: \$40,40 Berni 3		Q / x A	
Big Government Contractor, Inc		03/07/2016		Cost: \$73.24 Items: 7		Ø1 ≠ × €	
Anne's Accounting Service		03/02/2018		Cost: \$44.50 merrs: 3		2 / × 0	

Figure 192

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

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

									10
	Account *	Scorecard *	inspectiums #	Work Order *	Clients #	Inventory *	Employees *	Guick Search	
se this page to manage supply usage records insi + Back	le of this list.								
iest									
end Dairt									
AMM Test Client									
Anne's Accounting Service	_								
Sarik of America									
Big Government Contractur, Inc									
Big Gum Gym & Pet Gmoning									
Big Joe's Auto Sales									
Cheese Factory Inc									
The Distance of Making Series									
ty									
tata Dip Cade									
v Save									



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

										100
ANTORIAL MANADER		Account *	Scorecard *	Ingections *	Work Onliar *	Clients *	Insentory *	Employees *	Quick Search	
Use this page to manage supply us	age records inside of t	Nis Test.								
< Back										
Cliest										
Anne's Accounting Service										
lade										
01/14/2016	商									
Water										
Notes Address										
Address 123 This Next Street Over										
Address 123 This Mark Streat Over										
Address 123 This Next Street Over Day										
Address 123 This Next Street Over Day Yonder										

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.

IN A											iter O
		# fremos	licoreca	nd *	impertions *	Work Order #	Clem *	inventory *	Employees *	Gook Starth.	0
Une this page to manage supply usage records inside of it	his list	6									
+ Back											
GENERAL SUPPLIES											
Supply from		Unit Cost	Quartity								
Barlant Supply Derry		\$0.00	1.00	:	+ ARE						
Apha Clean Scrubbing Stuff - 5 Gal - Alpha Clean	1				4						
Borubbing Stuff - 1 Gal - es - Bob's Supplies and Stuff					_						
Andy's Famous Paint Nemover - Andy's Famous Paint				Q.,							
Namower - Surgina Supply Supplier				۱.							
Back Brace - Back Brace - Bob's Supplies and Stuff	-			V	1						
Bimoni - 24 in push troom - War Mart	6-	_	_								
Brinstein - 481° Push - Brissenn - 481° Push - Brits's Supplies at	st										
The second s	1011										



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.

IN A											List O
ANTORIAL MANAGEN		Account *	Scorece	and * to	spections *	Work Order *	Clients *	Inventory *	Driployees *	Clast's Search	9
Ite this page to manage supply usage records invi	de of this list										
+ Back											
GENERAL SUPPLIES				1	2						
Separate Hone		Unit Cont	Quantity	1	•						
Broom - 24 in push broom - WW-Mart		\$6.50	1.00	\$ 1	Ipdate						
Supply List Items											
Supply lien		Unit	Cost	Qty	Cost	Actions					
Bruom - 24 In push broom ()		24	96.50	3.00	\$32.50	Remove					
			rists	5.09	\$32,50						

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.

Supply Usage Mainter			8137227-S									
Use this page to manage supply us Client	age record	Start Deb			End Date	tot.						
Anne's Accounting Service		03/27/3	2015	圆	06/25/2015	節	O Refresh	+	Add			
Client		τ	Date		Ŧ	Items		т	Note	Ŧ	Actions	Ŧ
Anne's Accounting Service			05/13/2015			Cost: \$76.00 items: 4	é.		Take Notes Herel		Ø ≠ × ₽	

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.

Log Out Account * Scorecard * Inspections * Work Order * Clients * Employees * Quick Search. Inventory * Managers 0 Cost vs. Budget Explorer Manage Suppliers Scorecard Manage Supply Items Generic Supply Item Import Scorecard: All Clients 2014 * C Refresh Manage Supply Usage Summary - January 01, 2014 through December 31, 2014 port to PDF 🖨 Print Q Detail Income vs. Expenses For January 01 2014 thru December 31 2014 Least Profitable Expense Breakdown Profit/Loss \$200.000 \$187,008 Add. Svcs. \$180,000 \$160,000 Big Government Contractor, Inc (\$1,257.88) Misc \$136,320 The Party of the First Part (\$357.11) Labo \$140,000 \$120,000 \$100,000 \$109.66 Jane's Cakes \$154.22 Franchi Top Shelf Driving School \$80,000 \$51,287 \$60,000 Cheese Factory Inc \$463.36 Suppl Paper \$40,000 \$20,000 50 Expenses Profit/Loss income Other Staff

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.

lient	Start Dat			End Date						
Anne's Accounting Service	01/27/	2015	00	06/25/2015		🖒 Refresh	1	Add		
Client	т	Date		Ŧ	Items		Ŧ	Note	Ŧ	Actions
Anne's Accounting Service		05/13/2015			Cort: \$70.0 Items: 4	10		Talie Notes Here!		Q / × D

Figure 199

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

Sales	05/28/2015		cu	or 5110/04	USE DALA UDDI IDI DEIIVETIES	Call 🖉 🥖
		Copy List			×	
	05/26/201	Copy To Date				21
		05/27/2015		🗸 Сору		
istries	05/26/201:				der evenly betweer Please deliver bef business 5/27/15.	
int Contractor, Inc	05/25/201				æs Here!	2
ing School	05/21/2015	16	160			2

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.

< Back			
GENERAL	SUPPLIES		
Olent	0		
Big loe's Au	ato Sales	÷.	
Dute			
05/27/2019	5	Ē	
West 1			
Notes Use back di	oor for deliveries. Call	hist.	
Use back di	oor for deliveries. Call	hrst.	
Use back di		hist.	
Use back de Address 123 Street		hst.	
Use back de Address 123 Street	St	hrst.	
Use back di Address 123 Street City	St	linit.	
Use back di Address 123 Streat City Huntspatc	St h	leaf.	

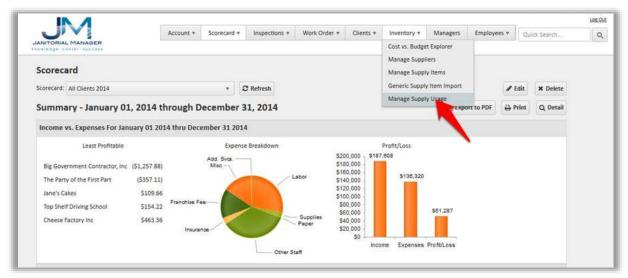
Figure 201

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

Back						
GENERAL SUPPLIES		Unit Cost	Quantity			
Select Supply Item		\$0.00	1.00	÷ + /	Add	
C		Unit Co	32 C		12000	V2002000000
Supply Item	Duint Dumanu			Qty	Cost	Actions
Andy's Famous Paint Remover - Andy's Famous	Paint Remove	r \$8.	54	1.00	\$8.54	Remove
Andy's Famous Paint Remover - Andy's Famous	Paint Remover		54 50			(Conservation)
Andy's Famous Paint Remover - Andy's Famous () Broom - 24 in push broom ()	Paint Remover	r \$8. \$6.	54 50 00	1.00	\$8.54 \$6.50	Remove

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.

		Accou	nt * Scorecard *	in the	ectures *	Work Order	e Clertts	* Inventory *	Employe	es.* Duck fearth	4
Supply Usage Maintenanc	e										
Use this page to manage supply usage mo	ords. To and	a new list, select i	a client from the list.								
Giest	Hart Det	*	Kind Date								
Fitter Client	* 01/14/	2016 E	04/11/2016	田	O Refre	nh + Add					
Client	Ť	Date		iter	na l		y Note	6	Ŧ	Actions	Ŧ
Anne's Accounting Service		81/15/2016		Cost: S Itemic	5					⊗ / × ⊕	
Anne's Accounting Service		03/14/2016		Cost: 5 Herrs:						Q / × ÷	
Big Government Contractor, Inc.		03/14/2016		Cost: 1 flems:						2 / * *	
Bank of America		03/11/2016		Cost: 1 ftensi	452.54 4					21 / 1	
Anne's Accounting Service		03/09/2016		Cast: 5 flams						2 / × 8	2

< Back					
GENERAL SUPPLIES					
upply Item		Unit Cost	Quantity		
Select Supply Item		\$0.00	1.00 +	Add	
		Unit Co	et Otu	Cort	Actions
		Unit Co	st Otv	Cost	Actions
Supply Item Andy's Famous Paint Remover - Andy's Famo	ous Paint Remove	Unit Co r \$8.5		Cost \$8.54	Actions
Supply Item Andy's Famous Paint Remover - Andy's Fam ①	ous Paint Remove	r \$8.5	54 1.00	\$8.54	Remove
Supply Item Andy's Famous Paint Remover - Andy's Fam ① Broom - 24 in push broom ①	ous Paint Remover	r \$8.5 \$6.5	54 1.00 50 1.00	\$8.54 \$6.50	Remove
Andy's Famous Paint Remover - Andy's Fam ①	ous Paint Remover	r \$8.5	54 1.00 50 1.00 00 1.00	\$8.54	Remove

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.

IM .									king s
ANTONIAL MANAGEN	Account *	Scorecard * In	spections *	Work Order *	Clents *	Inventory *	Deployees *	· Querk Swerch	¢
Use this page to manage supply usage records levels	e of they link								
+ lack									
		~							
GENERAL SUPPLIES	Unit Carl	Quantity	V						
Broom - 24 in push broom - WW-Mart		- I I I I I I I I I I I I I I I I I I I	Update						
Supply List Items									
Supply them	Unit Co	at Qity	Cost	Actions					
Broom - 24 In push broom ())	56.5	0	\$32.50	Remove					
	Total	s 5.00	\$32.50						

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.

Use this page to manage supply usage			a new 1st, se	lect a s	lient from the list.									
Client		Start Del			End Date									
Filter Client	٠	104/112	/2015	ਿ	07/01/2015	Ħ	G Refresh) Add						
Client		۲	Date		۲	Itama		۲	Note	•	Actions	1	Pis	nt Supply List
Big Government Contractor, Inc.			06/09/201			Cost: \$8 Items: 1	54				\$	۲	×	
Big toe's Auto Sales			06/03/201	£		Cost: \$1 Harris: 4			Use back door for deliveries. Call first.		45	ø	×	0
Bank of America			06/01/201			Cort: \$0 Items: 0					2	ø	×	Ð



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

CLIENT Big Government Contractor, Inc	LOCATION 15 Street Street Arab. AL 55665	DATE 06/09/2015
SUPPLIES		
	. Gal - Alpha Clean Scrubbing Stuff - 1 Gal - ea	a (Bob's Supplies and Stuff) Qty: 1
Andy's Famous Paint Remover	- Andy's Famous Paint Remover (Surplus Sup	oply Supplier) Qty: 1
Back Brace - Back Brace (Bob's	Supplies and Stuff)	Qty; 1
Broom - 24 in push broom (Wa	l-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 Buf	fer Pad (Surplus Supply Supplier)	Qty: 1
🔲 Buffer Pad - Red - Buffer Pad - I	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 ex	change (Bob's Supplies and Stuff)	Qty: 1
Spitfire - Gallon Mixed - Spitfire	e (Bob's Supplies and Stuff)	Qty: 1

Delete a Supply Usage Record

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

Select the Inventory tab and Manage Supply Usage.

IN A									Log D
JIVI	Account *	Scorecard *	Impetitions *	Work Order *	Clients *	Inventory *	Employees *	Grick Search	q
JANTORIAL MANAGER						Cori ve. Budge	et Explorer		
Scorecard						Managa Supp Managa Supp			
Scorecard: All Chents 2014	· · · ·	C Refresh				Generic Suppl	ly item import	Edit 🗰 Defete	
Summary - January 01, 2014 thr	ough December :	31, 2014				Manage Supp	an up you	whit Q betail	-
Income vs. Expenses For January 01 2014	thru December 31 201	4							
Least Profitable	Expense B	reakdown		Profe	v/Loss				

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.

		Account	* Scorecard *	inspe	ttions # W	ork Order *	Clients *	inventory *	Employee	• Gucki	arch	c
Supply Usage Mainten			-									
Use this page to manage supply usa Olivert	ge reconts. 30 ad Start D		End Date									
f Day Evert	* 01/14	/2018	04/13/2018	m	© Refresh	+ ABE						
Client		Date	Ť	item	0	Ť	Note		τ	Actions		т
Anne's Accounting Service		01/15/2016		Cest: \$3 Berns: 5					8	21,	8	
Anne's Accounting Service		03/14/2016		Cost: \$3 Rems: 5					6	2 × ×	8	
Big Government Contractor, Inc		03/14/2016		Cost: 53 Herris: 2						21	8	-
Bank of America		03/13/2016		Cost: \$1 items: 4					6	21 / >	8	

Figure 210

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



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.

IN A								1		Lon D
J'YI	Account *	Scorecard *	Impetitions *	Work Order *	Clients *	Inventory *	Employees *	Quel S	arch.	Q
ANTORIAL MANAGER						Fort vs. Budg	rt Coplorer			
Scorecard						Managa Supp Managa Supp				
Scorecard: All Clients 2014	+ 4	C Befresh				Generic Suppl	ly item import	Edit N	Defete	
Summary - January 01, 2014 th	rough December	31, 2014				Manage Supp	ny Usage	whit Q	Detail	
Income vs. Expenses For January 01 202	A thru December 31 201	4 :								
Least Profitable	Expense B	reakdown		Profit	vLoss					

Figure 212

A current list of supply usage transactions will be displayed.

IN A											Welco	me, demousa	in int
		6	Account #	Scorocard *	inspections *	Work Onlier *	Cierts *	Inventory *	Employe	s *	Guick Se	with	6
upply Usage Maintena sette page to manage supply or lest	-	to add	100 10 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	2 from the list late	3	4							
AMM Text Clent	•	01/14/	10.5200	13/2018	TE O Refra	sh + Abi			123				
Anne's Accounting Service Bank of America			Date 03/15/2016	,	Rems Cost: \$32,50 Rems; 5	3	Note			Actio		a	T
Big Government Contractor, inc Big Guns Gym & Pet Grooming			05/14/2015		Cost: \$32.50					2	/ ×		
Big Joe's Auto Sales Cheese Factory Inc. The Translation and Archite Transl			05/14/2016		Cost \$31.50 Items: 2					8	/ ×	₽.	
Baril of America			05/11/2016		Cost: \$152.54 Reno: 4					æ	/ 1	÷	
Anne's Accounting Service			00/09/3016		Cost: \$73.53					他	/ x	25	

- 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.

INTERIAL MANABER		Account +	Scorecard	• inspections •	Work Order •	Clients • In	ventory • Englis	typest +	duck search	Q
100124-01116-111101				Manage Imper	tion (
Manage Inspection	n Template	IS		Review Impact	harms.					
				Manage Templa	ates	_				
	LATE DETAIL	AREAS & STEPS is. Templates define what que	istions app) Add Nex	e Terrgilate
	pection template		ntions app			Scoring		Actions	1.5	e Tempilate ®
he following kit contains in	pection template	es. Templaties define what qu	۲	war on an impection.	0	Scoring Escelient Rang Sood Rang		Actions Q. View		



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.

	Account #	Scorecard *	inspections *	Work Order *	Cheuts ¥	Inventory *	Employees *	Datik Search	d
Manage Inspection Templates									
TEMPLATES TEMPLATE DETAIL	AREAS & STEPS	-							
An inspection template may contain one or mor Use this page to manage areas and their associa						volates.			
and our balls of standing states and states and states of	au aite ou ai moi bile.	to create inspec	recut the officiation areas	and an area of a	1999 So 1999 See	offering C			
Areps New Area			MALE INVESTIGATION	and a second			Seen		

Figure 215

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

5		Account *	Scorecard *	Inspections *	Work Order *	Gents +	inventory ¥	Timployees +	duist Seatch	
ANETORIAL P	ANAGER									
	www.commerce									
Manage	Inspection Templates									
	ADD	S & STEPS								
TEMPLATE	S (EMPLIATE DETAIL PART									
			wheeling of solar	and share the numbers	o durbar the biomer	thins.				
TEMPLATE An Impection Use this P	template may contain one or more area	. An area represents a c					mpfaties.			
An Inspection		. An area represents a c					nplates.			

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.

												U.C.D.
ANTOPIAL MANAGER			Ac	ccourt *	Sourceast *	Impections *	Work Didar #	Clients *	Inventory *	Imployees *	Quel Saint-	9
Manage Inspection	Templates											
TEMPLATES TEMPLA	TE OFTAN	AREAS 8	STEPS									
	mensed with the	-										
									ripfatan.	/		
									nplatus.			
Use this page to meroge areas :					e to create Insp	ection templates an		iteps to the te	nglatun.	5444		
Use this page to memory even a Areas New Area	and their associa				Seve St	ection templates an	id andgri arman and i	iteps to the te	Actions] 5000		
Use this page to memory even a Areas New Area	and their associa	rted visps, 1			s to create insp Seve St No	ection templates an leps New	id andgri arman and i	iteps to the te	Actions			
Use this page to menoge areas Areas New Area Name	and their anarcia Steps (rted visps, 1		ther page	s to create insp Seve St No	ectios templates an teps New sme	id andgri arman and i	iteps to the te	-			
Use this page to menoge areas Areas New Area Name	and their anarcia Steps (rted visps, 1		ther page	s to create itep	ectios templates an teps New sme	id andgri arman and i	iteps to the te	Actions			
Name Lobby	and their anarcia Steps (rted visps, 1	due the of	cher page	s to create itep	ectios templates an leps New ame Sinks	id andgri arman and i	iteps to the te	Actions			

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.

				Ao	count *	Scorecard *	inspections *	Work Order *	Olents *	liwento	y »	Employoes *	Quick Search	G C
Manage Inspection	Template	-	AS & :	STEPS										
les impection template may co-		-		_	÷	collarition of rela	ated stops to perfor	m during the inspe	390na.					
1991 - 19		ciatest ste	igis: Or	se the o	1			2	teps to the ter	nylates.	٨	1 aur		
Use this page to manage aroas Areas New Acea Name		Action	ops: Or	se the o	1	Save St	ection templates an ega New ime	2	teps to the ter	nylates. Action	A	Save		
Areas New Area			ngas. On	1	Copy	Save Sb	egis New	2	tegs to the ter		1	See		
Areas New Area Name	Steps		ары. Ол	1	1	Save St	ega New	2	teps to the ler		4	Sere K		

Figure 218

Create a New Inspection Template

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

JIVI	Account *	Seumoard *	Impections *	Work Drifer *	Clients *	Inventory +	Employees *	Garak Search	0
ARTOHIAL MANAGER			Manage Inspect						
Manage Inspection Templates			Review imperti-		_				
	AS & STEPS		Massage Temple						
The following flat contains impection templates. Temp			hispection.					+ Add New Ter	

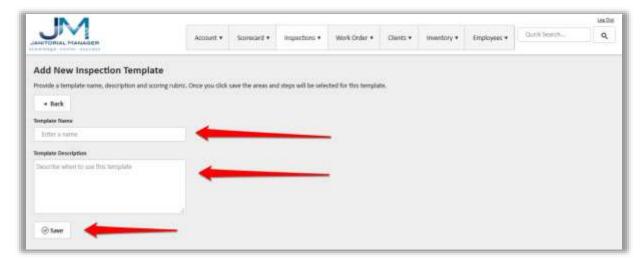


Select the Templates tab on the left. A list of existing templates will be displayed. To create a new Template, click the Add New Template button. Figure 219.

NTORIAL MANAGER	1	Account	* lor	scard * Inspection *	Work Drder *	Clents.*	Inventory *	Employees *	Quick Search	
Manage Looct	tion Templa	tes								
	and the second second								~	
		- AHLAN & ALLAN								
	VIPLATE DETAIL		and the second states	and the set becauted as						
		APELAS & STEPS otes. Templates define what que	estoni ap	pear on an inspection.					+ Add No.	w Temple
he following list contain			estons ap	pear on an inspection.	Ŧ	Scoring		T Action		w Templa T
he following list contain		otes. Templates define what qu	estons ap	100.00	Ŧ	Scoring Excellent lange	90 % to 30	T Action		
he following list contain	s inspection temp	otes. Templates define what qu	estors ap	100.00	т			T Action	15	

Figure 220

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



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.

Manage Inspectio	o Temola	tes									
	ATE DETAIL										
		lates. Templates define what question		ut as impertion.							
S	S. 19		22							+ Add New	Templet
Name	π	Description	T	Length	Ŧ	Scoring		Ŧ	Actions		τ
						Taxallerst Range	- 90 % to 10	0%			
						Good Range	- 30 % to 30		Q View	11 10 10 11	
Default		Use this most of the time.	36			isond wardle	10 5 10 20		OL NEW	× Delete	
Default		Use this most of the time.	16			Poor Range			of sien	X DEVE	
		Use this wont of the time.	00	engliste to involte.		0.000000000	0 % to 70	•	O, New	X DECR	

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.

present * Inspections *	Work Under * Cherm *	Amendory * Employees *	Diek Seech
e 1			
question template.			
Areas & Hoge 🔤 🚽 Save			
85 N to 102 %	•		
1 1 10 10 10 10 10 10 10 10 10 10 10 10			
20.96 10:45 %	•J		
		0.00.00.70.00	0.% to 70.%

Figure 223

Click on the Areas & Steps button.

JM	Account.*	Scorecard #	Fearerthons 7	Write Dealer *	Clem *	Intentory *	Employees 7	Dian Seattle	Loss Co
ANTONIAL MANAGER							1. Martine .	I MARK PERMIT	1
Manage Inspection Templates									
TEMPLATES TEMPLATE DETAIL	AREAS & STEPS			/					
Use this page to edit template details, including		in inspection temp	Arts.						
Templete Anne's Accounting		C, Areas & Stay							
and the second sec	National Contraction								

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.

JM	Account +	Scorecard *	inspections +	Work Order +	Clerits •	inventory +	Employees •	there Search	and Q
ANTONIAL MANAGER	Account Y	storeard *	rapecona v	HILE CALLS	Contras V	manual .	tutholase .		
Modify Inspection Areas	& Steps								
ise this page to modify what steps appe		tep boses to inclu	de 8 on the imped	tion tempiate.					
+ Back									
+ 88CK	1								
loor Job Inspection									
lreas	Steps	0	Add All × 8	Remove All					
Litting	Carpet		and the state of the second	-	_				
Office									
Bathrissen	E Reschoor								
Conference Room	Entry Glas	4							
Warehouse	🐼 High Dust	ing :		-	_				
Breakstom	Water Pla			-					
Roof	C. Heart								
Bathroom 2									
Alstei									
laviturs Closet									
led									
Leb									
Patto									
Parking Lot									
Quantivient 3									
Beurrent									
Lobby 8									
front Office									

Figure 225

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

JM	Account	t. Som	iand * Impact	ini T	ork Onlive *	Clarits *	inventory *	Employees *	-DAWSouth-	united
Nanage Inspection Templa TEMPLATES TEMPLATE DETAIL	AREAS & STEPS	in this impe	ction tumplate.							
Regulate Daily Inspection	*	Q, A4	nut & Steps 👘	Save						
lengiate Narse	Scoring Ranges									
Daily impection	Excedient Rang		85 % to 100 %			-				
implate Deuripfice Uar when you want to impact daily.	Good Range		70.5-10.85 %							
implate Deuxiptice	110,000,000									

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.

									Line in
ANTORIAL PLANAGER	Account #	Scorecard 1	impections	* Work Order *	Clients *	Inventory *	Employees *	Outst Search	9
Manage Inspection Templates									
TEMPLATES TEMPLATE DETAIL	AREAS & STEPS	6							
One this page to edit template details, including a	what she will be baged on t	his impaction t	areplata.						
and a second									
template Daily inspection		Q, Areas B	Steps: J Sa		-	2			
Templete Daily Inspection	Scoring Barges	Q, Areat B	Steps 🗸 Sa	**		8			
	Scoring Ranges					8			
tenglute Name Dally Impaction Tenglute Description	Excellent Range	- 85	% to 100 %						
Template Name	Excellent Range	- 85	% to 500 %			30			
Template Name Daily Impaction Template Oracolytims Use when you need to impact daily.	Excellent Range		% to 500 %	•		20			

Figure 227

Schedule Recurring Inspections

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

	Account =	Scienced *	Impection *	Work Onder #	Cherits *	Investory T	Employee	16 Bi	di Searchin	4
arat Ofici. Hawasen			Manage Impacti							
Scorecard			Review Impectili Manage Templat		-	-				
Scorecard: All Clarecs 2014	*	C Refresh						/ tala	X Delete	
Summary - January 01, 2014	through December i	31, 2014				🕒 Expo	n to PDF	🖶 Print	Q, Detail	
Income vs. Expenses For January 01 2	014 thru December 31 201	4								
Laurer Development	Persona A	(mailed room)		Thereit	ana -					

Figure 228

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

			1.000				Wark Ord									ag th
	THIAL MANAGER		Acon	int * Sc	erecard *	Inspections *	Wark Cro	ter *	Ciert	ta * triven	tury +	1911	loyees *	S. Only	h Smjrch,	0
1.1.75	ections														/	
	ix page to manage impections.					🛩 Update I	léseatura	0.84	l Scheds	de Inspection	0	Schedu	e New Is	Aspection	& Managa My Al	
					1000		and the second s	¥							- menter mit m	
10000	(Dett.)		Inspirator 1976 - Inspirator		Scheduled		Hart Date 03/03/2016	č		tred Date 03/31/2016		m:	O Refr	20		6713
clent	Client	• •	courses.			*	Wart Date	č		tred Date 03/31/2016	Actic	m		20		eru
clent		• *	Fifter Inspectate		Scheduled Status Scheduler	*	Hart Date 03/03/2016	Ŧ	m	tred Date 03/31/2016	, i	m		20		

Figure 229

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

Bulk Schedule Inspe	ections
Use this page to schedule hund	drads of impactions with just a few clicks. Do not use this page to schedule a single impaction.
* Back	
Cline	
Specific Client	① This function will schedule appendents for all active clients who require a monthly respection if left blank,
huspanter	
Select importor	• 0
Templata	
Detect Terriplate	• 0
First Oceannes	
February 25, 2016	m (c)
# of Months	
	: 0
Overall Robes	
😔 Sawe 🛛 🚄	
Bolded Helds are required.	

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

	streds of impections with just a few clicks. Do not use this page to schedule a single impection.	
« Back		
Clieve		
Specific Clarit	O This function will schedule imperitons for all active clients who require a monthly imposition if left blank.	
Importor		
Salect impactor	• ①	
4		

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.

																		in D
	HAL MANAGEM		A.	eount *	50	record *	impections *	Work D	der 1	Cler	da *	Inventory	<u> 1</u>	Limploy	Ne#1 *	0,16	haartu	٩
111111	ections page to manage impections.																	
	talls in unsalls jurbectiour.																	
clean			Importor			tabe:	✓ Updata	Start Dute	0.	ulk Sched	iale Inspe End Date		⊙ 5ch	ndule f	Verwi tina	pection	A Managa My	Alerts
time 1	Serb.		Filter impriction		•	Scheduled		03/01/2016	e.	T	01/31/7		17	0	Refres	n ┥	_	-
	Client	7	Inspector		Ŧ	Status			÷	Score		T A	tions					
+	Anne's Accounting Service		Detaber, Detab			Scheduled	or 01/11/201	6		N/4		9	F +	÷	X	ж.		
۰.	Big. Scenetoment, Cantosciay, Ju		fore,3ceru			Scheduled	ier 0.9/29/381	6		N/04		3			1			
Υ.	Ng Ave's Auto Sales		Buna, Senerg			Scheduled	or 01/20/201	£		N/A				8	1	ж.		



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

	HIAL MANAGEM		Acco	nunt *	korecard	* Inip	ections *	Wark 0	rdør *	Oler	ta * invent	ury #	1	nuloya	en 7.	(duin)	hearth
Insp	ections																
Use thi	s page to manage impections.																
								hopecture	0.		ule Inspections	0	Sched	halie No	ew Inc	pection	A Manage My Alerta
Clear 1	Charles .		Ferr Inspector		Mates School	and a second		start Date 03/03/201			End Date 03/31/2016		-		Ralia		
		1					10.00	naidatante		1000			1,009.1	1.9			
	Client	Ŧ	Inspector		T St	tus			τ	Scon	T	Actio	ind				
•	Anne's Accounting Service		Detaher, Detah		Saber	fulled for 0	3/11/201	6		N/A		쌺		8	1	х.	
+	Balicovernment Contractor. In	8	hero.Astra		Sche	duked for D	0/29/201	6		N/A		w		0	1	R.	
*	Rig Joe's Auto Sales		Bong, Sonry		Sche	Auted for D	n/in/ini	6		N/A		쓭	۲	8	1	×	
*	Tim's Engineering Service		Bana, Soony		Sche	Autor for 10	0/20/201	e.		N/A				-	1	-	_
	Jame's Calves		Bono, Sonny		100	fulled for 0	Anara	<i>.</i>		N/6		-	1.	100	6-	100	

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

chedule Inspection									
I out the required fields to sched	tale an irra	ection. The k	time the car I	e conformed at any	wint other schedule	W.			
- Back					Provi and Providence				
Skert.									
Tim's Engineering Service									
repector									
iono, Sonny		Ø							
rrsplate									
Detailed		0							
ype_									
Monthly									
cheduled Date									
darch 20, 2016	1								
World Notes									

Figure 234

Change Inspectors

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

JM	Adcount *	Scorenard *	Inspections *	Work Order *	Chiefs *	Incentory *	Employees	* ai	Uterrit.	0
LANTONIAL MANAGER			Manage Import	ines -						
Scorecard			Review Inspects Manage Templo			-				
Scorecard: All Clients 2014		C Refresh		_				/ Edit	X Delete	
Summary - January 01, 2014	through December	31. 2014				(D Kappa	et to POF	A Post	Q Detail	

Figure 235

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

	Acco	nent + 1	levencarit *	Imperitoris 1	Work On	dur #	Cherry	s 7 invest	1999 P	ting	krywei +	0.4	k Searchu	0
Inspections the fill page to manage impections.				of Lindata	hispasters	() au	A Schude	is inspections	0.	dedu	e New In	apacture	. Marrie	a My Alanta
tliest	Impedax		take .	1.0.000000	Start their	00.07		nd links	0.					
Pillar Chart	Films transmiss		Filler Storius		00/01/2016		信	03/33/2016		8	⊖ Bato			
	Boron, Source		STATUE	_		Ŧ	Score		Action					
Client Accords Accounting Service	Datcher, Patish		Scheduled 1				N/A	18.4						

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

													=i)		Logis
NATO	HIAL MANADER			Account * 1	icorecard *	hispections *	Work Onto	n.* Cie	(IS *	inventory s	- 101	spłoyees	•	Daich Search	0
nsp	ections							/							
			impedor		Status	🛩 Update	Impectors C) Bulk Scher	date trap End Dat) Salved	ule New	01050	tion 🌲 Manaj	pe My Alert
Ier#	Olare	+	Impediar Bona, Sonny		Status Scheduled	Local and	Mart Date) Bulk Scher	1.1.1.1.1.1.1) Salved	ole Nevo	01050	tion 🌲 Manaj	pe My Alert
Ter#		• •	100 C 100 C 100 C			(1997) 	Mart Date) Bulk Soher (E) Y Scor	End Dat 03/31/	2016) Solved 111 ions		01050	tion 🌲 Manaj	pe My Alerti
Ter#	Olane 11 - 920924	• •	Bona, Sonny		Scheduled y Statu	(1997) 	Nact Date 03/01/2016	v Scor	End Dat 03/31/	2016	1		01050	tion 🛔 Manaj	pe My Allert

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.

										Welcome, demouser	1000
	Account *	Sommard.*	Impecture * V	Nork Oollar *	Olerts *	Invest	1013 F	Emplo	y945.7	Chiefe Search	C
Update Inspectors											
this function will update the impector on each											
1. The inspection status is felveduled, in	Propress, Completed and Review	ed tospection reco	inds cannot be update	ed in this man	rvel.						
Bono, Sonny	Cancel 🖌 Save										
Bono, Sonny • Of	lancel 🗸 Save										
	Inspector	γ Status		т	Score	Ŧ	Actic	ma			
Solid Survey			Her 03/11/2016	Ŧ	Score N/A	Ŧ	Actic	na Þ Ə	1		
Recher, Reuh	Inspector			Ŧ		τ	Actic	ns ► Ə	1	×	
Netter Genth Discher, Henth Unit, Denie	Inspector	Scheduled				τ	Actic 열	ns F B	1	x	
Trescher, Fleich Unit, Denis Williama, John	Inspector Boro, Jonny	Scheduled	for 03/11/2016		N/A	Ŧ	Actic M M M M	• •	1 1	x	

Figure 238

Set an Inspection Alert

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

JM	Alcount *	Secretard +	Inspections *	Work Order *	Chiefs #	Incentory *	Employees *	Quit & Search	9
LANTONIAL MANAGER			Manage Impect						
Scorecard			Baview Inspects Manage Templo			-			
Scorecardi All Clients 2014		C Refresh					1	felit X Defette	
Summary - January 01, 2014	through December	31, 2014				[]] Expert		vint Q Detail	

Figure 239

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

			Account +	Scorec	art +	Inspactions +	Work O	det v	Cier	its + inven	tory +	Em	piloyees +	Quin	Search	un o
the this	ections page to manage inspections.													1		
						🗸 Opilate i	inspectors	O B	ulk Sched	ule Impection	• •	Schedu	de New Insp	rection	# Mana	ee My Alerti
Claut		Impector		Stat		Constanting of	inspectors Start Date	⊙ B		ule Impection End Date	• •	Schedu	de filew insp	rection	# Mana	ge My Alerti
	Salesy .	Inspector Filter Inspector		50	na heduled	Constanting of	Start Date 05/01/201	5			• •	Schedu	de filew imp O Refres		& Mana	ge My Alert
Claut		1114 1110		50	heduled	1020	Start Date	5	B	Eved Date (18/31/2016					A Mana	ge My Alert

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.

IN A								70	ian Sui
	Account +	Scarecard +	Inspections +	Work Order +	Clients +	inventory +	Employees +	Guidi Search	٩,
Citaca Manage My Alerts									
Lanitorial Manager can sand alerts size email when an insp	rection is completed								
2 Impettion Completed									
This agent is sent when a Janitorial Manager completes an									

Conduct Inspections

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

	Alcount *	Secretard +	Inspections *	Work Order *	Chiefs #	meentary *	Employees *	- au	uk termitu.	Q
ANTONIAL MANAGER			Manage Import							
Scorecard			Baviani Inspecto Manage Templot			-				
Scorecard: All Clients 2014		C Refresh						e de	X Delete	
Summary - January 01, 2014	through December	31, 2014				D Esper	I SA POF	Print	Q Detail	

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.

	MANASER		Autor	unt * De	wrend *	Impections *	Work Order	* Clants *	huverd	ory *	Taple	9895 T		laime, denicusei Search	Q
Inspect	ge to manage inspections.														
	Contrast Contrast Contrast	-		and the second se											
	1	/	Impector		Status	d Undere 1	Inspectors 💮 Start Date	Bulk Schedule End	lespertions Oute	0	Icheniule	New Imp	etter	& Manage My	Alerts
Sert	1		engestor Bonu, Sorny		Statue Scheduled			End		0		New Imp		& Manage My	Alerts
Sent Filter Dier	1		Inspector	•			Start Date	End	Oute	Actio				🌲 Managa My	Alerts
Gent Filter Oler	. 🗡	•	0.046.0000	•	Scheduled Status		Start Date 03/03/2016	End Score	Oute	114.5755) Refresh		& Manage My	Alerts

Figure 243

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

															Wei	kone, demaser	Line D
	NAL MANADER			Account # 5	corecard *	Impections *	Work Ord	ler. T	Clier	ita * Inve	ntory *	D	riploye	HAN T	Qubi	leeth	0
Inspe	ections																
Use this	page to manage impections.							100									
						🛩 Update		⊙ ₽+		iule impectio	• 0) Sebas	fuie Ni	ew line	perfier	A Manage My	Alerte
Clett			Impector		Statter .		Shart Date			East Date							
Hiter C																	
The C	Jaerti.	. *	Bono, Sarary		Schedulyd	*	03/03/2016		50	03/31/2016		10	2	Refres			
	Client	T	Inspector				03/03/2016	Ŧ	Score		Acti	ions ,	-	Refres			
					r Status			Ŧ	Score N/A			ions		Refres /			
	Client	T	Inspector		r Status Scheduler		6					ions	0 4 4	Hetres /			
	Client Anne's Accounting Service Big Government Contractor,	T	Inspector Bono, Some Bono, Some		r Status Scheduler Scheduler	∦ f== 03/11/201	6		N/A			ions	0 4 4 4	i i			

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.

	Account * Soorecard *	* Inspections * Work-O	nder * Clients. *	Invectory *	Employees *	Oukk Tearch	Lie C
Perform Inspection							
apand each area listed below and provide arrest	irs for every step. Your amounts are seved e	a you program, so don't worsy a	bout saving.				
« Back. This importion has not been started	Please complete the stops below	lviert					
Anne's Accounting Service	Monthly Inspection Sun	nmary					
EXCELLENT 0							
6000 0	0%	0%					
POOR 0	0 /0	0 /0					
BIOPPED 0	FINAL SCORE	COMPLETE					
UNRNOWN	6						
Office							
EXCELLENT 0							
0000 \$	0%	0%					
POOR 0	0 70	0 %					
SKIPPED 0	AREA SCORE	COMPLETE	/				
UNKNOWN EL 1			/				
		lear Area Answers 🔹 View	Neps				
Conference Room							

Figure 245

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

Bathroom				
EXCELLENT	0			
GOOD	0	0.0/	0	0/
POOR	0	0 %	0	70
SKIPPED	0	AREA SCORE	COMP	ETE
UNKNOWN		6		
			Clear Area Answers	A Hide Steps
Step		Excellent	Good Poor	Skipped
Counter				
Sinks		•		

Figure 246

Perform Inspection		
Expand each area listed below and provide answers for	every step. Your answers are saved as	s you progress, so don't worry about saving
Back This inspection is In-Progress. Please comp	plete the steps below. 🔒 Print	
Tim's Engineering Service Mo	nthly inspection Sum	mary
EXCELLENT 3		
GOOD 2	94 %	21 %
POOR 0	J4 /0	
SKIPPED 0	FINAL SCORE	
UNKNOWN 11		
Office 2		
EXCELLENT 3		
GOOD 2	010/	100.0/
POOR 0	94 %	100 %
SKIPPED 0	AREA SCORE	COMPLETE
UNKNOWN 0		
	✓ C	lear Area Answers Aide Steps
Step	Excellent Good	Poor Skipped
	✓ AII	✓ AII
Baseboards dusted		

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

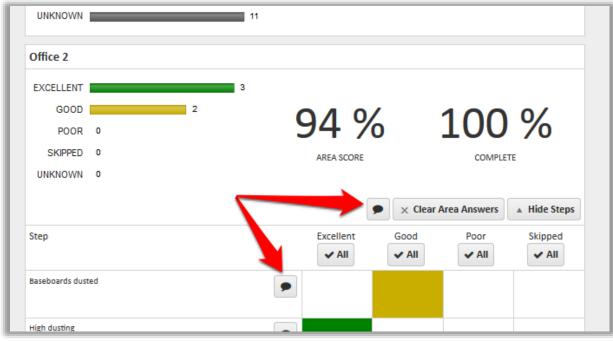
Figure 247

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

UNKNUWN U		× Clear	Area Answers	▲ Hide Steps
Step	Excellent	Good	Poor All	Skipped
Baseboards dusted				
High dusting	•			

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.

Perform Inspection		
Expand each area listed below and provide answ	wers for every step. Your answers are	saved as you progress, so don't worry about s
Back This inspection is In-Progress. Plea	se complete the steps below.	Print
Tim's Engineering Service	Monthly Inspection S	Summary
EXCELLENT 0		
GOOD 5	<u> </u>	5 31 %
POOR 0	03 /0	
SKIPPED 0	FINAL SCORE	COMPLETE
UNKNOWN		
Office 2		
EXCELLENT 0		
GOOD		100.0/
POOR 0	85 %	100 %
SKIPPED 0	AREA SCORE	COMPLETE
UNKNOWN 0		
		× Clear Area Answers A Hide Steps
Step	Excellent All	Good Poor Skipped
Baseboards dusted	•	
High dusting	•	
Trash cans emptied	•	
Blinds cleaned	•	
Carpet vacuumed	•	



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.

9	Edit Step Note	×
AF	The sinks are dirty.	
Ð		.::
	× Clear 🗸 Save	



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

IN A								Los,
ANTORIAL MANAGER	Account + Scoreci	ed * Inspections *	Work Order +	Dients +	inventory *	Employees +	Guild Search	
Perform Inspection				-				
Expand each area listed below and prov	ide answers for every step. Your answers are ses	ed as you progress, so d	un't weber	ing.				
Back This impection is 100 % core	repliete. Are you ready to complete the inspectio	n ^a 🗸 Complete Inig	estion @Print					
Big Government Cont	ractor, Inc Monthly Inspect	ion Summary						
EXCELLENT E								
0000	69%	100	0%					
Deating								
	HCLP							
Conference Table								
				-				
			Sect. To Top			2		
This inspection is 100 % complete. Are	you ready to complete the inspection? 🚽 G	implete Impection	a Print					

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**.

		Account +	Scorecard +	Impections +	Work Order #	Ciem +	Investory +	Employees +	Quelt tearth	
ANITORIAL MANAGER										
Complete Inspecti	on									
Rease provide the following		a mark this inspection	s as complete.							
+ Back		-								
Clent. Big Government Contractor.	int.									
hupschar										
Bono, Sonny										
Tepe										
Monthly	(a)									
Schenkaled Date										
March 29, 2018	商									
Performed On Date										
March 29, 2016	03									
Overail Notes										
v Save	100									
Conception and	and the second se									



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.

Review Inspec				Equand the rows, review the					
Class		acti row in the grid is a b pector			detalls and mar	t the impection as n	(Anima)		
Fiter Dient	• 1	Rei Higedor	+ 🔿 Reties	ab					
Client	т	Inspector	т	Completed On	т	Score	τ	Actions	Ŧ
Big Joe's Auto S	ales	Bano, Sonny		05/20/2018		Result: Excellent Score: 95 %		e ×	1
A 40	• (#) 25 +	items per page							1-1 of 1 mms

Figure 254

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

	iew Inspections									
See the	is page to review completed inspects		ach row in the grid is a completed impect sector	5 mit	apand the rows, review the details an	र्व साम	it the inspection as re-	vitive	d.	
	Clett 4	1000	nar trapacturi 👻 🖒 Re	efresh	8					
	Client	Ŧ	Impector	T	Completed On	T	Score	τ	Actions	τ
• •	Ble.toe's Auto Sales		Batsi, Sonty		03/20/2016		Result: Excellent Score: 95 %		e =	
	EXCELIENT		10							
	6000 8000 8		95 %	1	100 %					
	POOR 8		55 /0	נ	100 /0					
	SKIPPED III 1 UNKOSOWN B		FINAL SODRE		COMPLETE					
	OVERALL NOTES		1							

Click Show More Detail to review the

Client	Inspector		THE REAL PROPERTY OF						
Faler Ciele	· Fitter Imp	ector	+ O Hafee	sh					
Client	T Ins	pector	т	Completed On	Ŧ	Score	т	Actions	τ
+ - Bislips's Auto Sales	Bata	.Secou		03/20/2016		Result: Excellent Score: 95 %		÷×	
EXCELLENT	1	10							
GGOD C	5	05	0/	100 %	(
POOR a		3.) /0	100 %	D				
BAGPPED 📰 t			AL SCORE	DOM/PLETE					
UNKNOWN 0		Đ	CELLENT.						
OVERALL NOTES Suggest followup inspection	in the week								
and the second s		51							
* Show More Detail	Mark As Reviewe	4							
Area: Office 2 Next: Atlention				94 %					
Baseboards dusted		Dollert.							
High duiting		Excelent							
Trash cans emptied		Georg							
Blinds cleaned		Sec.							
Duit on the black									
Carpet vacuumed		Ecolett							
				94 %					
Area: Bathroom									
Acces: Bathroom Counter		trollert							
		Scelent							

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.

JVV	-	Acco	unt + 13	Scorecard +	Inspections +	Work Ord	lei + Cle	nts = /meent	ory + Dr	ployees +	Quill Sea	roh. C
IANITORIAL MANAGER		Mana	ige Account	n:								
		Marta	igs Segmer	nts l								
Inspections		Time	kenper tiro	278								
Use this page to manage inspections.												
Use this page to manage impections.					🗸 Update i		🕞 Bulk Scher					Manage My Alerts
Lise this page to manage inspections.	- 10	Impector		Distan	10000000000			dule inspections End Date				
Use this page to manage impections.		hupector Reper to question	13	Nature Scheduled	10000000000	nspectors () Buik Scher	dule Inspections			ection 🛔	L Manage My Alerts



Click the Add New Segment button.

	Account +	Scorecard +	impections +	Weat	Order + C	Seits	* Inventory *	Emplo	86.4	Quid	iterti.
Segment Maintenance											
					Client Listing		III Employee Unting		User List	ing	+ Add Rew Segn
Name T	Description			т	Clients	T	Employees 1	. 0	sers		tions
Area Code 35803	All Clients located in 35803				2		3	1			

Figure 258

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

Add New Segme	nt	×
Name *		
Description		
		.::
 Required field 		
	✓Save ★Cancel	

Delete a Segment

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

	-	A	ccount + 5	corecard +	Inspections +	Work Ord	ser + Cle	ints + /meen	tory + Er	nployees +	Quilli Search	0
IANITORIAL MANAGER		M	lanage Account									
		M	lariage Segment	8								
Inspections		T	mekenper tiros	1.1								
Use this page to manage inspections.												
					🗸 Update		🕒 Bulk Schr	dule inspection	i ⊙ Sched	ule New Inspe	ction 🛔 Manage	
	10	hupector		Natur	🛩 Update							
Use this page to manage inspections.		happetter Relati krajectar		Nature Scheduled	♥ Update	inspectors	🕒 Bulk Schr	dule inspection			ction 🔹 Manage	

Figure 260

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

			Account +	Scorecard +	inspections +	waa	Order + C	lients	* Inventory *	Ð	rykoyeek *	1	dula bee	di.	0
Segment Maint	tenance														
itse this page to manage	a segmenta						Client Listing		🔳 Employee Listle	•	III Over 1	Listing	+	Add New Seg	men
ite this page to manage Name	t segments. T	Description				= v	Client Listing	Ŧ	Employee Listle	e T	Et Uver 1 Users	Listing T	+ Action		men

Figure 261

Add Clients to a Segment

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

JM	-	19	Account +	Scorec	+ 110	Inspections +	Work O	der +	Cler	ns + /meen	ory + Dr	nployees +	0.00	Search	lor b
Inspections		-	danage Acces Ranage Segmi Smekesper En	8753											
Use this page to manage impections.						Le lindres l	outertain	0.84	Colum	de inconstitues	Oster	tale fiere brook		·	to block
		21020		-		🗸 Update i	CONTRACTOR OF THE	() Bul		ule inspection		tule New Iosp	pection	A Manage N	Ay Alerts
Claus		Impoctor		11.4		100000000000	Start Date			End Date				A Manage N	Ay Alerts
				* Sc	ha helvied	100000000000	CONTRACTOR OF THE	6				Co Refree	n.]	A Manage N	Ay Alerts

Figure 262

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

	Acc	sunt + Scaretard +	impections +	Work 0	rdør + O	ients -	* Inventory *	Ð	ryicyesi *	0	ula b	and [0
Segment Maintenance Use this page to manage segments				=	Sent Listing	-	I fragloyer Listing	ŧ.	III User I	Listing		+ Adri New Segment
Name T	Description			Ŧ	Clients	Ŧ	Employees	T	Users	Ŧ	Actio	ent
Arre Code 35805	All Clients located in 55603				2.5		3		1		1	

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.

	Account	t + Scorecard +	inspections *	Work Order *	Clients	 Inventory * 	Employees +	Quick Search	
Segment Maintenance Are this page to quickly add and remove clemic Clark	rom segments								/
Client	т	Segment *			T 5	egment Actions		1	,
AMM Test Client						Select Action			
Anne's Accounting Service					1.000	Select Action			
Benk of America						love To Ares Code 3 love To General	5805	-	
Sig Government Contractor, inc						love To Medical Pac love To New	anes		
Big Gons Gym & Pet Grooming					M	lave To West Side			
Big Joe's Auto Sales					E	Select Action			
						Select Action			

Figure 264

Remove a Client from a Segment

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

J	-	9	Account +	Scorecard +	Inspections +	Work Order	+ Clent	ts + /meento	ev v Dr	ployees +	0.005	each.
ANTORIAL MANAGER		N	danage Accru	nt								
Inspections			Aariage Segme									
inspections		T	Irrekesper bir	ore .								
Use this page to manage impections.												
					🗸 Update i) Bulk Schedu	de Inspections				A Manage My Alerts
		Impector		Natur	110000000000		Bulk Schedu					
		hupetor Reprincessor		tatas scheduled	Insont Acces	nspectors 🕞	Bulk Schedu	de Inspections Evel Data			pection h	

Figure 265

Select the **Client Listing** button.

JM			Account +	Scangard +	inspections +	Work Orda	f * Clien	s = Inventory	< a	Creyficyees +	0	vidi Search	Q
Segment Maint						III Cier	at Listing	III freptoyee List	ing	III User 1	Listing	+ Add New	Segment
Name	т	Description				т	lients y	Employees	т	Users	Ŧ	Actions	
			55603			1						A123 A123	

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.

				Links
ANTONIAL MANAGEN	Account + Scorecard + In	rpections * Work Order * Cher	nts + Inventory + Employees +	Guilt Seech.
Segment Maintenance See this page to quickly and and remove cher & Back Client Listing	ns from segments.			
Client	T Segment	Ŧ	Segment Actions	т
AAMM Test Chard	West Side		- Select Arlton -	
Anne's Accounting Service			Service Action -	
Bank of America			Retricise Protect West Sale Mover To Area Code 35805	
Big Government Contractor, Inc.			Move To General	
			Move To Medical Facilities Move To New	
Big Guns Gym & Pet Grooming				
Rig Guns Gym & Pet Grooming			- Select Arthur	



Add an Employee to a Segment

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

0.43	-	A	Account #	Scorecard +	Inspections +	Work Order +	Clents +	Inventory	e ce	pioyees *	Quilli Search	1
IANTORIAL MANAGER		M	fanage Account	n:								
Inspections			tariage Segme									
		-11	imekenpler Liro	24.6								
Lise this page to manage inspections.		-										
Use this page to manage inspections.		-			🗸 Update i	nspectors () 8					ection 🛔 Manag	
Use this page to manage inspections.		apactar		Thather				spections		ile New Inspe		
Use this page to manage impections.	(by)			Nature Scheduled		nspectors (3.8	ulik Schedule In Eed D	spections			ection 🌲 Manag	

Figure 268

Select the **Employee Listing** button.

JM		Account +	Scorecard +	inspections +	Work	Dedeer + C	Herts	* inventory *	E	mplojees *		aid Seatth.	Q
Segment Maint						Client Listing		III tradition Lists		III User 1	bring	+ Add form	i Segment
	Description				Ŧ	Clients	7	Employees	7	Users	Ŧ	Actions	
Name													

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.

Account * Sear	card * Inspections * Work Order *	Clients * Inventory * E	mploques *	Line O
Segment Maintenance Employee successfully removed from segment. Use this page to quickly add and remove employee	from segments.			
Employee T	Segments	T Add Segments		Ŧ
Blooth, Franklin		- Add Segment -	* + Add	1
Bono, Sonny		- Add Segment -	• + Add	
Coktoszin, John	Modical Facilities X	- Add Segment Area Code 35805	+ Add	
Employee, Ellen J.	General X	General Medical Facilities	+ Add	
Fletcher, Fletch		New	+ Add	
Hope, Bob		West Side — waa segmenc —	+ Add	

Figure 270

Remove an Employee from a Segment

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

	-		Account #	Scorecard +	inspections +	Work Order +	Clents +	Inventor	v.e Emp	pioyees *	Quilli Search	
IANTORIAL MANAGER			Manage Accru	en:								
Inspections			Manage Segme Timekeeper bi									
Use this page to manage inspections.												
Use this page to manage inspections.					✓ Update		vilk Schedule In				ction 🛔 Manage	
Use this page to manage inspections.		Inspector		Hatur	🗸 üpdate			spections				
Use this page to manage inspections.				tista • Schedule	ed y	nspectors 🕞 B	ulk Schedule In End D	spections			ction 🔹 Manage	

Figure 271

Select the **Employee Listing** button.

JM	Account +	Scorecard +	impections +	Work Ord	ier + 0	ients	* inventory *	Emplojets +	1	us teerin.
Segment Maintenance Use this page to manage segments.				= ci	ent Listing		ill Employee Lining	ill ther ti	nting	+ Add New Segment
Name T	Description			τ	Clients	7	timployees T	Users	т .	Actions
Area Code 35805	All Clerits located in 35803			2			3	1		/ ×

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.

imployee successfully removed fr Jse this page to quickly add and r		from segments.					
C Bock							
mployee Listing							
Employee	т	Segments	т	Add Segments			
Blooth, Franklin				- Add Segment -		+ Add	
Bono, Sonny			-	- Add Segment -		+ Add	
						Conversion 1	
Coktostin, John		Medical Facilities X		- Add Segment -	*	+ Add	

Figure 273

Add a User to a Segment

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

	-	A	ccount + 5	orecard +	inspections +	Work Order +	Clents +	Invento	ry + Em	pioyees *	Quillin Search	
IANT CITIAL MANAGER		M	anage Account									
Inspections			lanaga Segmant mekenper Eiror									
Use this page to manage inspections.												
					🗸 Update i		ik Schedule I	inspections	() Sched	ule New Inspe	ection 🛔 Mana	ge My Alest
		Inspector		Mature	10000000000					ule New Iospe	ection 🛔 Mana	ge My Alest
	+	Naperter Richer Angester		Nature Scheduled	10000000000	Service of the servic	End	inspections		ule New Inspe O Refreah	2	ge My Alerti



Select the User Listing button.

JM			Account +	Scorecard +	Inspections +	Work (inder + 1	Sients	* Steenbory *	Đ	ngloyeei *		ukk bearen.,	Q
Segment Maintenanc													/	
an na tati a nanti cetano							Client Listing		🔳 Employee Listin		🖩 User (ating	+ Add Ney	e Segment
Name	т	Description				Ŧ	Clients	Ŧ	Employees	T	Users	т	Actions	

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.

					LOR
Account * See	recard * Impections * Work Ordec *	Che	ents * Inventory * Emple	Operation Contraction	
Segment Maintenance Jue this page to quickly add and remove users from < Back Jser Listing	segments.				
User T	Segments	τ	Add Segments		т
Besic Usor (BesicUser)	General X		Add Segment *	+ Add	
Darryl Harris (DarrylTrial)			Add Segment *	+ Add	
Demo User (demouser)			Aild Segment - Ares Code 35805	+ Add	
Demo User (Trial)	Area Code 35805 🗶		General	+ Add	
man management and a second	Area Code 35005 X General X		Medical Facilities	+ Add	
Greg Chasteen (GregChasteen)					

Figure 276

Remove a User from a Segment

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

0.41	-		Account +	Scorecard +	Inspections +	Work Order	Clients +	Inventory	e Em	pioyees *	Quilli Search	
LAWTORIAL MANAGER			Manage Accourt	n								
Inspections			Manage Segme Timekeeper Ein									
Use this page to manage inspections.					1100000000000000	nspectors 🕞 8	lufti Schedule In				ction 🛔 Manag	
Use this page to manage impections.		npector		Natur	1100000000000000			spections		ile New Isspe		e My Alert
Use this page to manage inspections.				Scheduled	1100000000000000	nspectors 🕞 8	lufik Schedule In Evel D	spections			ection 🌲 Manag	

Figure 277

Select the User Listing button.

			Account +	Scorecard +	Inspections +	Work C	inder + C	lients	* Internary *	ŧ	nployees +	0	ió teach	Q
Segment Mainte	egments.											2	/	
						100	Client Listing		Employee Listin	¢.	III User I	isting	+ Add New	Segment
Name	т	Description				Ŧ	Clients	٣	Employees	т	Users	τ.	Actions	

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

ALD	count * Se	precard * Inspe	ections * Work Orde	r = Client	* Inventory *	Employees *	Quick Search	100 C
Segment Maintenance Use this page to quickly add and reme C Back User Listing		i segments.						
User		y Segments	-	Ŧ	Add Segments			Ŧ
User Basic User (BasicUser)	3	General X			Add Segments	• + Ad	d	Ŧ
Basic User (BasicUser)	,		-	6		+ + Ad		Ŧ

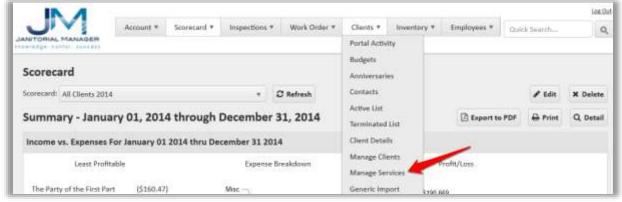
Figure 279

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**.





On the Services Maintenance page click Add New Service.

	Account *	Scorecard *	Inspections *	Work Order *	Clients	* Inventory	•	Employe	es #	Quick Se	aarth.	- Q
Services Mainte							1000		>			
Use this page to manage	services. Services			You can also specif							+ Ar	id New Service
Name	τ	Description			Ŧ	Work Or	Ŧ	Cli	Ŧ	Ac	Ŧ	Actions



Complete the Add New Service form.

Add New Service	8		
Name *			
Description *			
Required field			
		XCancel	

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.**

M	Account *	Scorecard *	Inspections *	Work Order *	Clients *	inventory *	Employeet #		los.0
IANITORIAL MANAGER	Hermitin -	Scorecard *	inspections *	WOLF CUIDED +	Portal Activ	The second s	Employees *	Guick Searth.	9
Scorecard					Budgets				
Scorecard: All Clients 2014			•	C Refresh	Contacts			/ Edit	X Delete
Summary - Janua	ry 01, 201	4 through I	December	31, 2014	Active List Terminated	List	Esport to	PDF 🖨 Prin	Q Detail
Income vs. Expenses I	or January 01	2014 thru De	ember 31 20	14	Client Detail	9. E	-		
Least Profit	able		52580006	Breakdown	Manage Cliv Manage Ser		volit/Loss		
The Party of the First Par	1 (\$160.47	1	Misc		Generic Imp	port store	8.9		

Figure 283

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

											Log O
NITORIAL MANAGER	Account	* Scorecard * Inspections * Work Order *	Client	ts * Inventor	¥ *	Employe	ei *	Quhik Se	earch		0
	ces. Servic	es are used on the work order screen. You can also specify	what s	ervices are availa	ble to	specific ch	ents.				
									+4	dd New	Service
Name	Ŧ	Description	٣	Work Or	Ŧ	Cli	Ŧ	Ac	+ A	dd New	Service
Name Carpet Cleaning - Hot Water Extraction	Ŧ	Description *Move furniture *Vocuum carpet *Clean Carpet and repla furniture when dry	T Ce	Work Or	Ŧ	CH	Ŧ	Ac	+ A		
Carpet Cleaning - Hot Water	Ŧ	*Move furniture *Vacuum carpet *Clean Carpet and repla			Ŧ	CH 11 10	Ŧ	Ac	+A T		



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

Edit Service		.*
Name *		
Consumable Supp	fleis	
Description *		
Tother and the second s	towels, hand soap, trash bags	
tonet paper, paper	towers, mind soup, meen begs	
tonet paper, paper	correct, racia acap, mass page	
tonet paper, paper	anners, ranta song, anner songe	
tonet paper, paper	and the state of t	
follet paper, paper	and a start and a start and a	
* Required field	Lowers, rank song, soort orga	

Delete a Service

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

IN A										Los Or
	Account *	Scorecard *	inspections *	Work Order *	Charits #	Inventory *	Employees *	Onrick	Searth	0
JANITORIAL MANAGER					Portal Activ	ity				
Scorecard					Budgets Aconheersari					
Scorecard: All Clients 201	1		*	C Refresh	Contacts				🖋 Edit	X Delete
Summary - Janua	ary 01, 201	4 through 1	December	31, 2014	Active List Terminated	List	🕒 Export to	PDF	🖶 Print	Q. Detail
Income vs. Expenses	For January 01	2014 thru De	ember 31 20	14	Client Detai	ls .	-			
Least Profit	table		Expense	Breakdown	Manage Cli Manage Ser		Profit/Loss			
The Party of the First Pa	rt (\$160.47	1	Misc		Generic Imp	port stone	0.0			



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

	Account	* Scorecard *	Inspections * Work C	Order * Clie	ents • line	ntory *	Employe	es. *	Cluick S	earch.		
ervices Maintena	1996-19 L	es are used on the woo	rk order streen. Vou can al	iso specify what	services are a	vailable te	soneiffe ch	stra				
se mus balle to unavalle serv	ANTWOL SAN ALL	ALL AND ADDRESS OFFICE OFFICE	the original particular contract	and the second second		2010/00/00	- specific an	1000				
ise this page to manage serv	PERST 200 VIL									+ A	dd New	Servio
Name	Ŧ	Description		Ŧ	Work O		Cli	Ŧ	Ac	+ A	dd New Actio	-
	Ŧ	Description	uum carpet *Clean Cerper	Ŧ				Ŧ	Ac	+ A		

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.

IN A																Los Dut
		24	Account."	Scorecar	6.9	inspections #	Work Orde	(Ŧ.,	Clients #	inentory	10	Dripk	1,000	Bubb bis	id:	9
ANTORIAL MANADER									Portal Activit	NC.						
									Budgets							
Client Maintenance									Anitwessarile	e						
As this page to manage all clier									Contacto							
									Athelis						+4	id New Dient
									Technited	lint		1	/			
Drag a column leveller and drop	3. here to group I	ry that column							Clerit Datafi		-					
Name	Ŧ	Segment	T	Start Date	Ŧ	Contact	T M	anti	Manage Che	-	tt.	Ŧ	Extern	al Code	۲	Actions
AMM Test Client		West Side		01/24/2	016	AMM Test			Manage Serv Generic Imp		-		Jan Mgr-40	006		1 *

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

			Account	it * licoenca	int.+	inspections.*	1.78	Work Order *	Clients #	insertions *	ŧ	malogen: *	third to	int.		1
Client Maintenance																
Sor this page to manage all charms.																
														+.4	udel Nerw	Cla
Drog a cultures header and drop it have to	grinapi			2012	- 11	1000 C	-									Clar
ling e sekenn header and drop it here to Name	ginapi T	liy that cilians Segment		Start Date	Ŧ	Contact	+	Monthly B	udget	y Active	Ŧ	External (Code *	+*		/
	group) T			Start Date	T 01.8	Contact Money Grabber	Ŧ	Monthly B	udget 5500.0	And the second second	Ŧ	External C	Code *			×
Name	graap) T						Ŧ	Monthly B	0.710	0 Yes	Ŧ		Code *			

Figure 289

Click the **Services** tab.

	Account *	Scorecard *	impection *	Work Order *	Clents *	investory *	Employees *	Clubb Search	Q,
Client Maintenance Update the client details and click the save button when finance	-				/				
Change Client Big Government Contractor, Inc.			GENERAL	SERVICES A:	SIGNMENTS	PORTAL	PORIALUS	1852	

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**.

Client Maintenance						
polate the client details and click the sawe batton when finished.						
Range Client Big Government Contractor, Inc. R	SENERAL	SERVICES	ASSEMMENTS	PORTAL	PORTAL USERS	
and gave which services can be provided to this clear. This list will limit what the clear	Lan regard sta the c	untimes press). H	Annage Services			
RVICES						
C Carpet Closeling - Not Water Extraction *Move functions *Vacuum carpet *Clean Carpet and replace furniture when dry	Provided					
 Consumable Supplies Torbit paper, paper tawels, hard page, trash hags 	Provided					
Deep clearing and flurnshing. *Non-deep emotions with an automatic struktur and appropriate periant merped senses, etc. *Nopl speed fluor burisher used as materiariance, sensoing scatthes as give and herdering war.						
C Machine Sirub and Reway	Provided					
*Early-removable furniture removal to a num one area and returned upon complete speed floor problem used to solution (a long large of was hit a timp identify, emoting and and disteriorization was, using appropriate seed. "Entre floor over respect with the for maximum defect removal 3.3 costs of was applied, to maintain floor appreciate	ne wath-out side					
Miss / Other	Provided					
Missellamous / ather spinite.						
D Special/Editor Clean	Not Provided					
Detail cleaning for special events upon respont						



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.

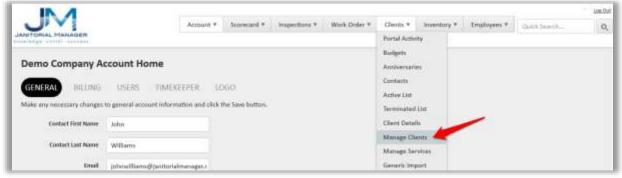
ill out the required fields to	schedule a service	work order.	
Client		Туре	-
Select Client		Service	. /
Requester Name		Service Type	
		Select Service Type	
Requester Email		Carpet Cleaning - Hot Water E	stract h
		Consumable Supplies	
		Deep cleaning and Burnishing	
Requester Phone #		Machine Scrub and Re-wax	
		Misc / Other	
Address		Special/Extra Clean	
		VCT Strip & Wax	
		Service Fee (5)	
City		\$0.00	- A

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.





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

			Acco	ont * loomia	int.+	inspections *	1.9	Work Order * Cl	ieits #	intenios *	ŧ	millions =	laick Serech		
Client Maintenance															
													1	- Add 3	Yew Cla
Drug a cultures header and drop it here to Name	i grinap l	by that oilane Segment	+	Start Date		Contact	+	Monthly Bud	get 7	Active	Ŧ	External Co			
Drag a calaran handar and drap it have to Name Big Government Contractor, Inc.	i group I T		Ŧ	Start Date	T 01.8	Contact Money Grabber	Ŧ	Monthly Bud	get 7 5500.00		Ŧ	External Con		T A	
Name	r group I T		Ŧ				7	Monthly Bud		Tes	Ŧ				



Click the Portal tab.

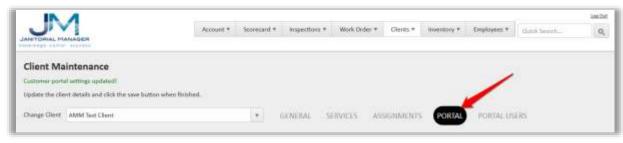


Figure 295

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

	Account *	Scorecard *	inspections *	Work Onle	v* Gants *	inventory *	Employees *	Daick beauth_	Q
Client Maintenance									
Customer protel settings spideled!									
Update the client details and click the save	button when finished.								
Change Client AMM Test Client			ORNERAL	SERVICES	ASSESSMENTS	PORTAL	PORTAL 1P	283	
Use this page to enable the customer ports	of and basic features.								
The contomor portal is NOT enabled.									
V Enable Portal									

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.

	Account.*	Scorecard *	imperiors (Work Order	*: Clients *	Intentory #	Employees *	dain teinh	Q
Client Maintenance									
Indate the client details and click the save button when finish	d.								
Change Client Anne's Accounting Service			GENERAL	SCRUCES	ASSIGNMENTS	PORTAL	POINTINE US	DIS NOTES	
No this gage to enable the sustomer portal and Seco Testures	9								
he puttimer portal is enabled.									
# Disable Portal									
he puttomer portal service request feature is NOT enabled.									
🛩 Enable: Service Request Feature 🛛 🛁	-								
he customer portal supply request feature is NOT anabled.									
🖌 Enable Supply Request Feature	_								
he customer portal feedback feature is NDT enabled.									
🗸 Enable Feedback Feature 🛛 🗧	_								
he puttimer portal impections feature is NOT enabled.									
✓ Enable hispections Feature	_								

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.

The customer port:	il is enabled.
× Disable Portal	
The customer port	al service request feature is enabled.
X Disable Service	Request Feature
The customer ports	al supply request feature is NOT enabled.
✔ Enable Supply	Request Feature
The customer porta	al feedback feature is NOT enabled.
✓ Enable Feedba	ick Feature
The customer porta	al inspections feature is NOT enabled.
✓ Enable Inspect	ions Feature

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.

ATORIAL HANAGER		~	* friends	licoretari	d * mspectums	 Work Orde 	r * Clerts *	inoverbarg # E	riployees *	Gush Searth	1
lient Maintenance											
dats the chent details and ch		atton when finished,								-	-
				100	GENERAL	SERVICES	ASSIGNMENT	E PORTAL	PORTAL S	SERS NOTES	
unge Client Big Ques Gym I	& Pet Grocms	108									
			1152-53	100	OCALIDAL.	Souther a			-		
e this page to create and man			trus cieren.		OCHERNAL	and a second sec				_	
			trus-client.		OCALITAL.	Services.					d-Portal Us
e this page to create and man	rage culture		trus cierri.		all Address	Ţ	Notes		T Action	+ Ad	d Portal Us
e this page to create and man atomet Partal Login	rage cuitorie T	r portel logins used by	this client.	τ Em		Ŧ				+ Ad	

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.

NATORIAL MANADER			ecourt *	Scores	ard # _ trapections #	Wurk Orde	r # Clants #	muentory + 4	снрізуння	58 L	Open Samon	
Client Maintenance		button when finished										
	R. Data Concern	en i d			STREET, ST	URVICES	ASSIGNMENT	E PORTALS	PORTAL	11SER	S CNOTES	
ana Sanaara			the class.	1	Constantine See					- Color		1
se this page to create and ma			this claim.	ŝ.	Constantion Con							1
Hange Client Egg Gurs Gym Ne this page to create and ma Cuttomer Portal Login Name			this claim.		mail Address	Ŧ	Notes	о (<i>анично</i>)	T Activ			del Portal U



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

First Name:	Office Phone:	
Last Name:	Office Phone Ext:	
Username:	Cell Phone:	
Email Address:		
Notes:		



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.

										12
		Account #	-50	ecard * inspections * V	Work Order	.* Clerts *	inverdory *	Employees *	Cover Search.	
lient Maintenance	e save button wh									
hange Chaint Big Gont Gym & Pet as this page to create and manage i unstance Portal Logis	Grooming			 GENERAL SERV 	0005	ASSIGNMENTS	PORTAL	PORTAL		
hange Clean Big Gons Gym & Pet	Grooming	ogens used by this close		GENERAL SERV Email Address		ASSISTEMEDICTS	PORTAL	PORTAL C	+4) dat Portal (): T
hange Chaint Sig Gunt Gym & Pet as this page to create and manage i asterner Portal Logis	Groonling Luttomer puriet (ogres used by this clien			Ŧ		PORTAL		+4	dat Portal O

Figure 302

Make necessary edits and click the Save button.

< Back		
First Name:	Office Phone:	
John		
Last Name:	Office Phone Ext:	
Williams		
Usemame:	Cell Phone:	
jwilliams2	2566981423	
Email Address:		
support@janitorialmana		
Notes:		

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

		Account #	Scoretan	* inspections	 Work Ord 	er #) Clehts #	intentory #.	Engelo	1953 #	Quality Search	
lient Maintenance	e button when finist										
hange Cleft Big dury byn & Pet bin Se this page to create and manage cash automer Portal Login		ed by this chert.	•	GENERAL	SERVICES	ASSIGNMENT	s PORTAL	POP	ITAL US		ES Add Portal (
Se this page to create and manage cust		ad by this client.		GÉNERAL all Address	SERVICES		s pontac		ItAL US		
se this page to create and manage out automer Portal Login	rher portal logina un	ad by this client.	γ Em		т		s pontac				Add Portal (

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

NTORIAL MANAGER		A	coount *	Scorecant *	inspection	1 * Work Dro	ec.# Cheots #	Inventory *	Emply	Noci *	Duick bearch.	
lient Maintenanc												
pdate the client details and	click the save	button when finished.										
									-		-	
Narige Clerit Big Guns Gyr	m & Pet Groot	ming			GENERAL:	SERVICES	ASSIGNMENT	5 PORTAL	PO	RTAL US	ERS NOTE	3.1
1		- 70			GENERAL.	SERVICES	ASSIGNMENT	5 PORTAL	PO	RTAL US	ERS NOTE	
ise this page to create and m		- 70	this client,		GENERAL	SERVICES	ASSIGNMENT	5 DORTAL	PO	RTAL US		
1		- 70	thụ cient.		GENERAL	SERVICES	ASSIGNMENT	5 DORTAL	PO	RTAL US		3 Add Portal D
ise this page to create and m		- 70	thų cient.		GENERAL I Address		Notes	5 DORTAL		RTAL US		
ise this page to create and o Soctomer. Portai Lagen		ver portal logins used by	thu dient, '	Ŧ Emai		Ŧ		5 PORTAL				Add Portal D

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.