

Janitorial Manager

User Manual

Updated 8/22/2016



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Initial Janitorial Manager implementation Checklist

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

Getting to know the Janitorial Manager (JM) User Interface

General user interface

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

The main JM functionality groups or tabs are highlighted below are Account, Scorecard, Inspections, Work Order, Clients, Inventory, Managers, and Employees.

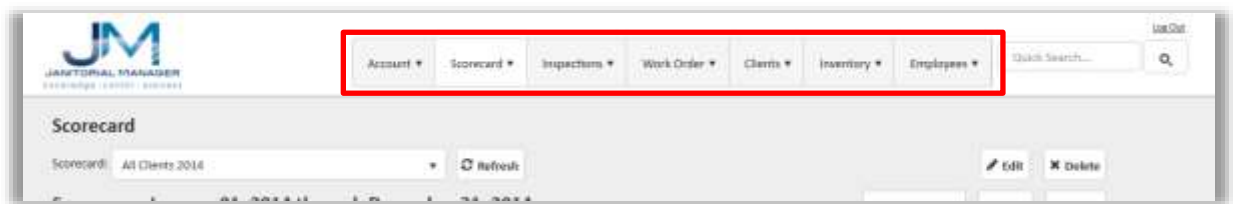


Figure 1

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

Account:

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

Scorecard:

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

Inspections:

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

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

Work Order:

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

Clients:

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

Inventory:

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

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

Employees:

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

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

Quick Search:

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



Figure 2

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

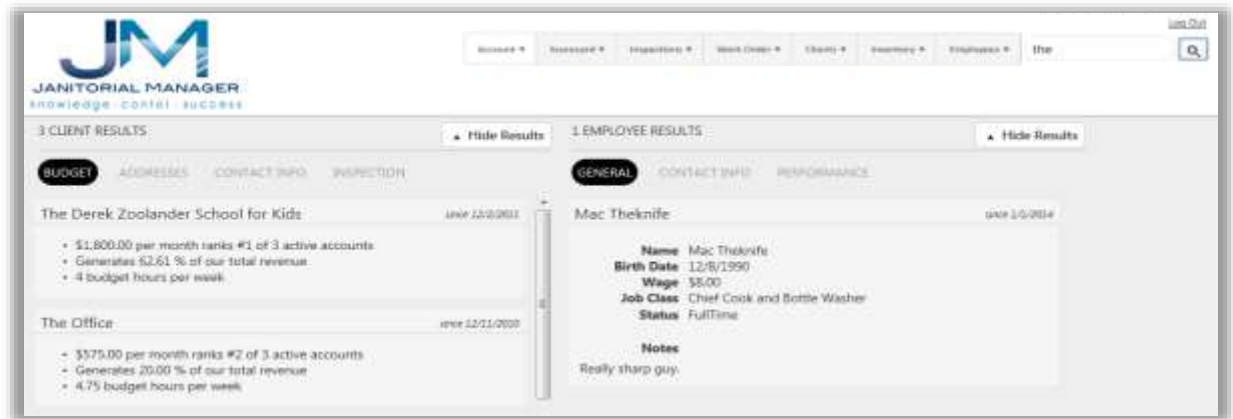


Figure 3

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

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

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

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
ACME Wholesale	11/03/2010	Jane Doe	\$1,000.00	Yes		
Anne's Jewelry and Tish Shop	10/11/2012	Anne Bardsley	\$200.00	Yes		
Big Guns Gym & Pet Grooming	12/06/2011	Tony Redneck	\$1,025.00	Yes		
Good People Brewing Company	05/16/2010	Ed Koch	\$900.00	Yes		
Starbucks Addiction Treatment Center	01/02/2014	Starbucks	\$1,200.00	Yes		
Sunshine Carpet Cleaners	06/22/2010	Matthew Wilhelm	\$600.00	Yes		
The Derek Zoolander School for Kids	12/01/2011	Derek Zoolander	\$2,300.00	Yes		
The Office	12/10/2010	Michael Scott	\$775.00	Yes		
Timmy's Car Lot (used)	12/03/2010	Tim Sparkerhammer	\$775.00	No	03/04/2014 16:25	
Top Shelf Driving School	12/10/2011	Ted Nugent	\$125.00	Yes		

1 of 10 out of 13 items

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.
 - o 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 to group by that column

Name	Start Date	Contact
ACME Wholesale	11/03/2010	Jane Doe
Anne's Armory and Sub Shop	10/11/2012	Anne Bom

The following form will be displayed.

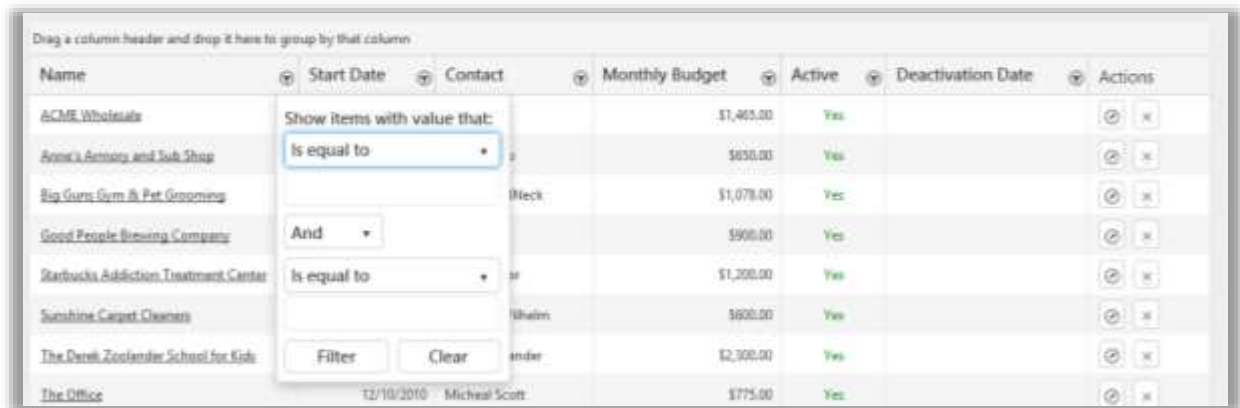


Figure 6 shows a data table with a filter dropdown menu open. The table has columns: Name, Start Date, Contact, Monthly Budget, Active, Deactivation Date, and Actions. The dropdown menu is titled "Show items with value that:" and has a search input field. The "Is equal to" operator is selected. The table data is as follows:

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
ACME Wholesale			\$1,405.00	Yes		[Icon] [X]
Acme's Armory and Sub Shop			\$858.00	Yes		[Icon] [X]
Big Guns Gun & Pet Grooming		Black	\$1,078.00	Yes		[Icon] [X]
Good People Brewing Company			\$900.00	Yes		[Icon] [X]
Starbucks Addiction Treatment Center		er	\$1,200.00	Yes		[Icon] [X]
Sunshine Carpet Cleaners		Whaim	\$600.00	Yes		[Icon] [X]
The Derek Zoolander School for Kids		ander	\$2,300.00	Yes		[Icon] [X]
The Office	12/10/2010	Michael Scott	\$775.00	Yes		[Icon] [X]

Figure 6

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

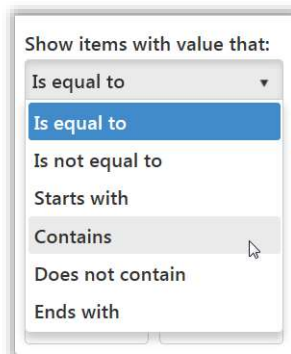


Figure 7 shows the filter dropdown menu with the "Is equal to" operator selected. The menu options are: Is equal to, Is not equal to, Starts with, Contains, Does not contain, and Ends with.

Figure 7

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

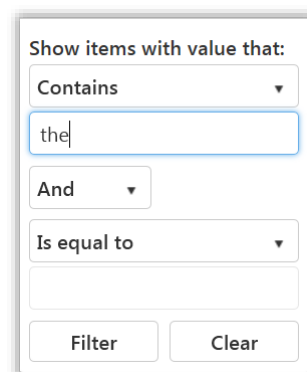


Figure 8 shows the filter form with the keyword "the" entered in the search input field. The form has a dropdown menu for the operator, a search input field, and buttons for "Filter" and "Clear".

Figure 8

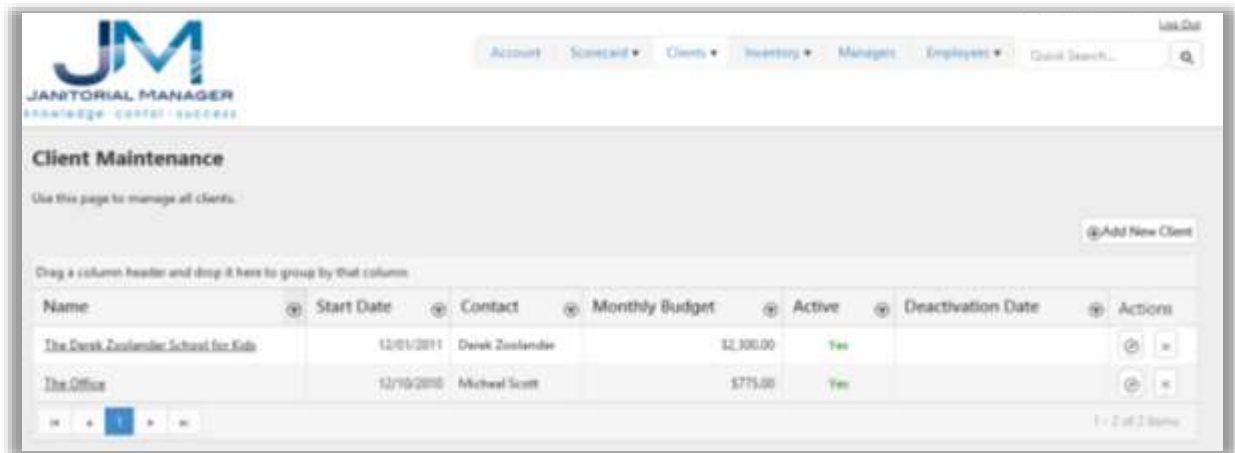
In the value field enter "the"

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

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

Click the **Filter** command

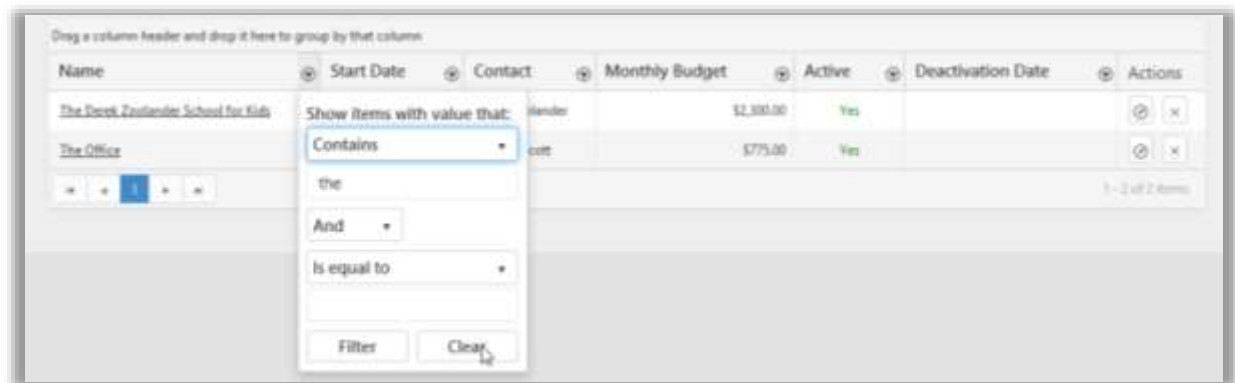
Notice that only results “the” in the name are displayed.



The screenshot shows the 'Client Maintenance' page in the Janitorial Manager software. The page has a header with the JIM logo and navigation tabs for Account, Scorecard, Clients, Inventory, Managers, and Employees. A search bar is also present. Below the header, there's a section for 'Client Maintenance' with a sub-header 'Use this page to manage all clients.' and an 'Add New Client' button. A table displays client information with columns: Name, Start Date, Contact, Monthly Budget, Active, Deactivation Date, and Actions. Two clients are listed: 'The Derek Zoolander School for Kids' and 'The Office'. The table has a pagination bar at the bottom showing '1 - 2 of 2 items'.

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
The Derek Zoolander School for Kids	12/01/2011	Derek Zoolander	\$2,300.00	Yes		
The Office	12/10/2010	Michael Scott	\$775.00	Yes		

Figure 9



The screenshot shows the same 'Client Maintenance' page, but with a filter applied to the 'Name' column. A dropdown menu is open, showing 'Show items with value that:' with options 'Contains', 'And', and 'Is equal to'. The 'Contains' option is selected, and the value 'the' is entered. The table now only displays the client 'The Office'. The 'Filter' button is highlighted, and the 'Clear' button is also visible.

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
The Office	12/10/2010	Michael Scott	\$775.00	Yes		

Figure 10

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

Company Setup

Setup your company's General account information

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

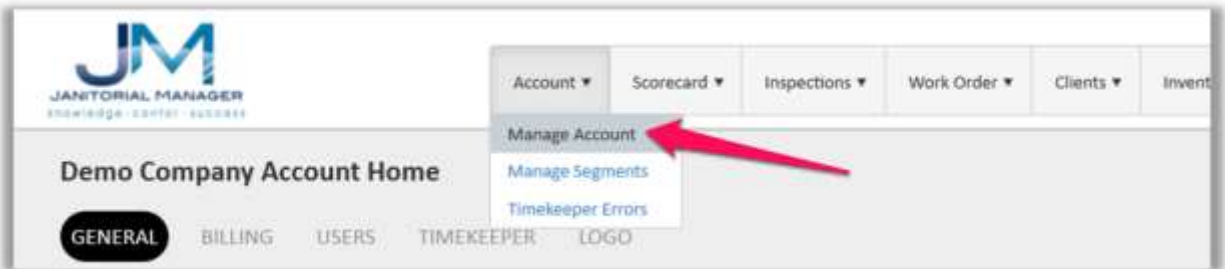


Figure 11

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

The screenshot shows the 'General' tab of the account setup form. A red arrow points to the 'GENERAL' tab. The form contains the following fields: 'Contact First Name' (John), 'Contact Last Name' (Williams), 'Email' (MyEmail@email.com), 'Phone Number' ((123) 456-7890), 'Phone Extension' (empty), 'Fax' (empty), 'Address' (Some Street), 'Address Line 2' (empty), 'City' (SomeCity), 'State/Province' (Alabama), 'Zip' (12345-6), and 'Country' (United States). A 'Save' button is located at the bottom right of the form.

Figure 12

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

Setup Your Company's Billing Information

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

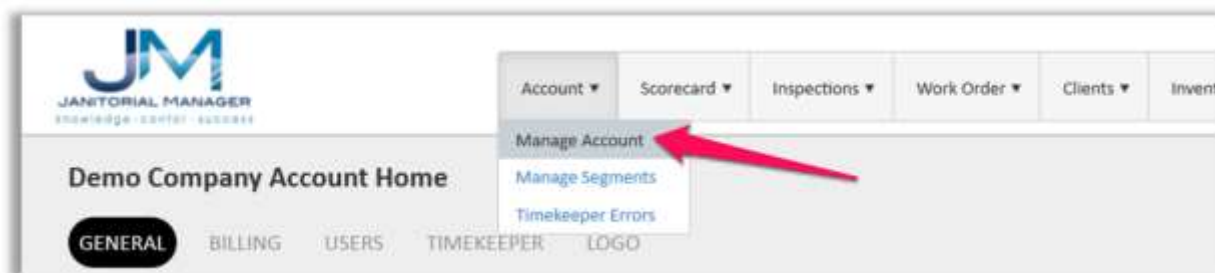


Figure 13

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

The screenshot shows the 'Demo Company Account Home' page with the 'BILLING' tab selected. The page contains a form for updating billing information. The form is divided into two columns. The left column includes fields for 'Cardholder First Name', 'Cardholder Last Name', 'Cardholder Email', 'Card Type' (a dropdown menu), 'Card Number', 'Expiration Month', 'Expiration Year', and 'CID/CVV2 Code'. The right column includes fields for 'Card Issuer Phone', 'Billing Address', 'Billing Address Line 2', 'Billing City', 'Billing State/Province' (a dropdown menu), 'Billing Zip', and 'Billing Country' (a dropdown menu). A 'Save' button is located at the bottom right of the form. A red box highlights the 'Card Number', 'Billing Zip', and 'CID/CVV2 Code' fields.

Figure 14

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

Add New User

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

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

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

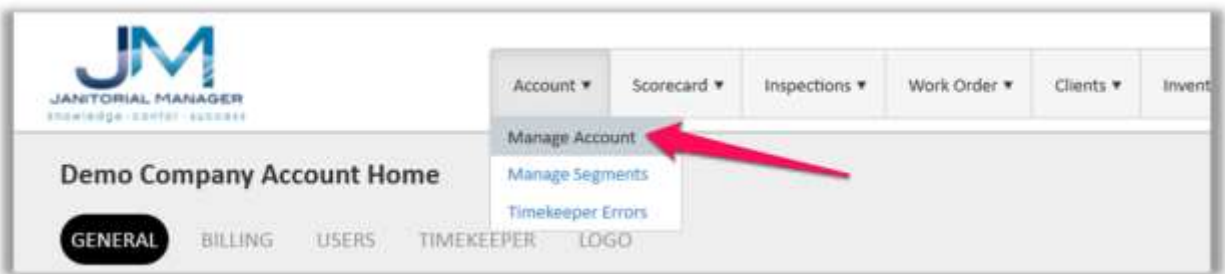


Figure 15

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

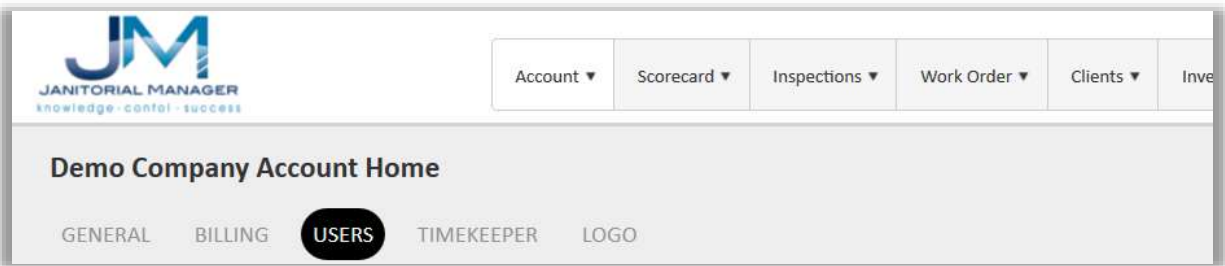


Figure 16

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

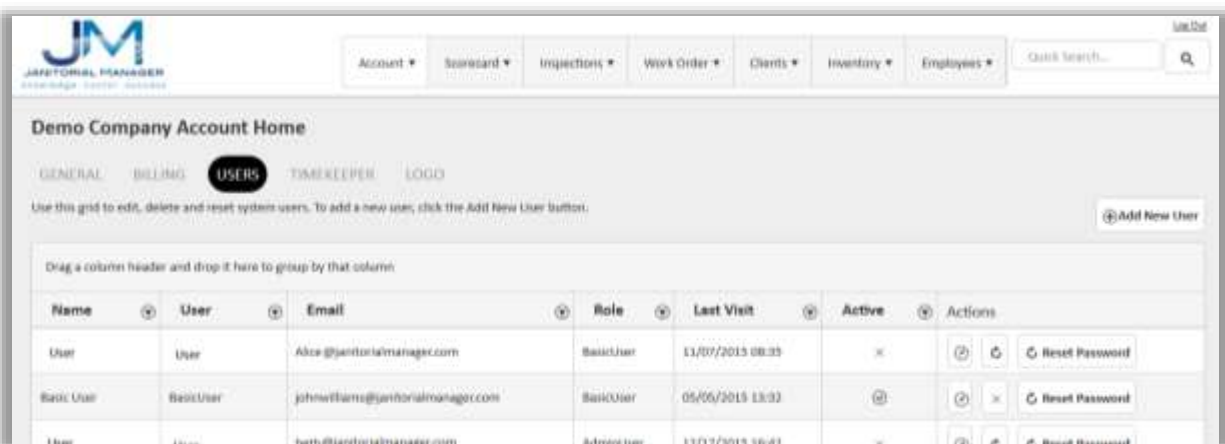


Figure 17

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

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

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

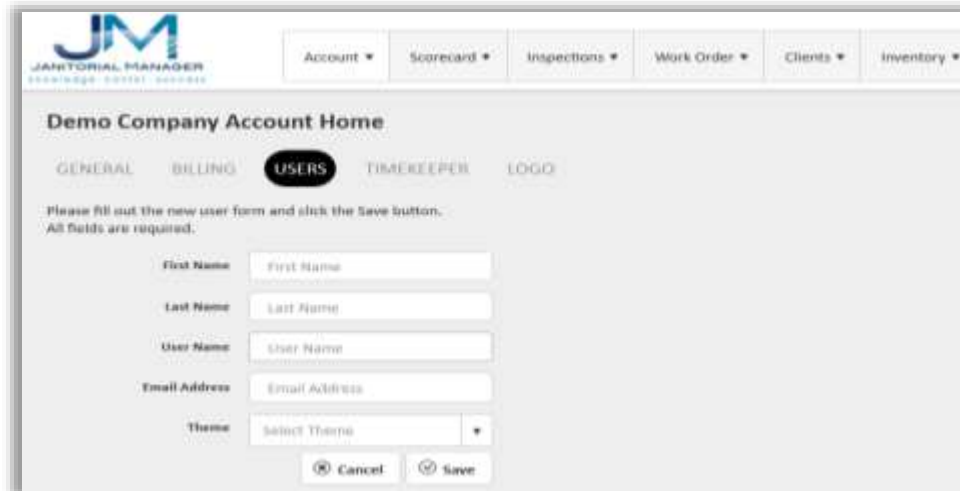
The screenshot shows the 'Demo Company Account Home' interface. At the top, there's a navigation bar with links: Account, Scorecard, Inspections, Work Order, Clients, and Inventory. Below this, a sub-navigation bar has tabs for GENERAL, BILLING, USERS (which is selected and highlighted), TIMEKEEPER, and LOGO. The main content area is titled 'Please fill out the new user form and click the Save button. All fields are required.' It contains five input fields: 'First Name', 'Last Name', 'User Name', 'Email Address', and 'Theme' (a dropdown menu). At the bottom of the form are two buttons: 'Cancel' and 'Save'.

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 logs in, they will be required to choose a permanent password.

Note: A valid email address must be supplied for the user. A temporary password will be emailed to that user when the user is successfully created as shown in Figure 19!

The user who's email was entered during the user create process will receive a am email from support@janitorialmanager.com as shown in Figure 19.

The screenshot shows an email template with the heading 'Welcome to Janitorial Manager!'. The body text reads: 'A system administrator recently created a Janitorial Manager account for you. Please use the following credentials to access your account.' It then lists 'Your username: johndoe' and 'Your temporary password: q@YK^g84940Y'. Below this is a blue 'Login' link. At the bottom, it says 'Please [Contact Us](#) if you have any questions regarding your account.'

Figure 19

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

The screenshot shows the Janitorial Manager login page with a password reset form. At the top is the JIM logo and the tagline "JANITORIAL MANAGER cost . quality . people". Below this, a message states: "Your password has been reset by an administrator. For security purposes, please change your password." Three red asterisks indicate required password characteristics: "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.", and "The new password and confirmation password do not match." The form includes fields for "Temporary password", "New password", and "Confirm new password", each with a masked password input. A "Password strength" indicator shows "too short". At the bottom is a "Change Password" button with a checkmark icon, which is highlighted by a red arrow.

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.


The screenshot shows the Janitorial Manager terms and conditions page. At the top is the JIM logo and the tagline "JANITORIAL MANAGER knowledge . control . success". Below this is a checkbox labeled "I accept these terms and conditions" which is checked. To the right of the checkbox is a "Continue to Janitorial Manager" button, which is highlighted by a red arrow. Below the checkbox is the heading "JANITORIAL MANAGER TERMS AND CONDITIONS" followed by a paragraph of text: "BY USING JANITORIAL MANAGER ONLINE SERVICE, YOU AGREE TO THE FOLLOWING TERMS AND CONDITIONS (THE 'AGREEMENT') GOVERNING YOUR USE OF JANITORIAL MANAGER ONLINE SERVICE, INCLUDING OFFLINE COMPONENTS (COLLECTIVELY, THE 'SERVICE'). IF YOU ARE ENTERING INTO THIS AGREEMENT ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY TO THESE TERMS AND CONDITIONS, IN WHICH CASE THE TERMS 'YOU' OR 'YOUR' SHALL REFER TO SUCH ENTITY. IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT AGREE WITH THESE TERMS AND CONDITIONS, YOU MUST SELECT THE 'I DECLINE' BUTTON AND MAY NOT USE THE SERVICE." Below this is a "WELCOME" section with a paragraph of text: "As part of the Service, Janitorial Manager will provide you with use of the Service, including a browser interface and data exception, transmission, access and storage. Your registration for or use of the Service shall be deemed to be your agreement to".

Figure 21

User Themes

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

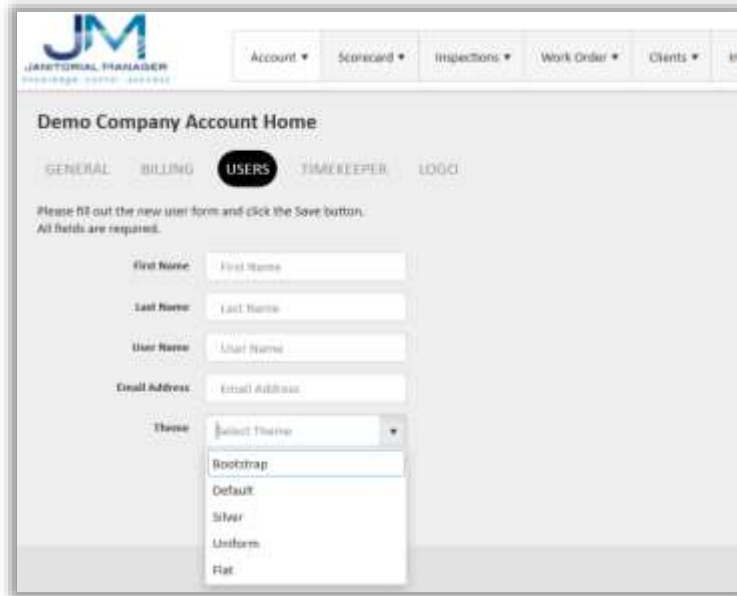


Figure 22

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

Bootstrap Theme



Figure 23

Default Theme



Figure 24

Silver Theme



Figure 25

Uniform Theme



Figure 26

Flat Theme



Figure 27

User Roles & Rights

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

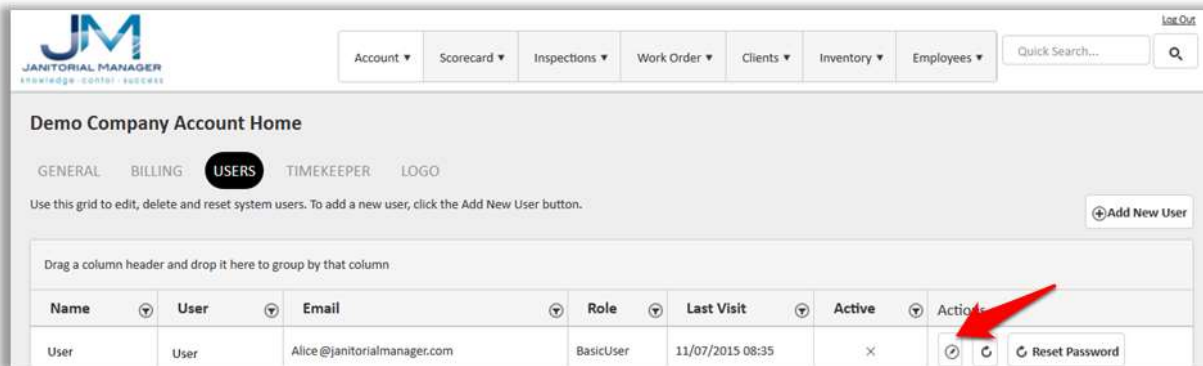


Figure 28

Select the Security tab under the user information.

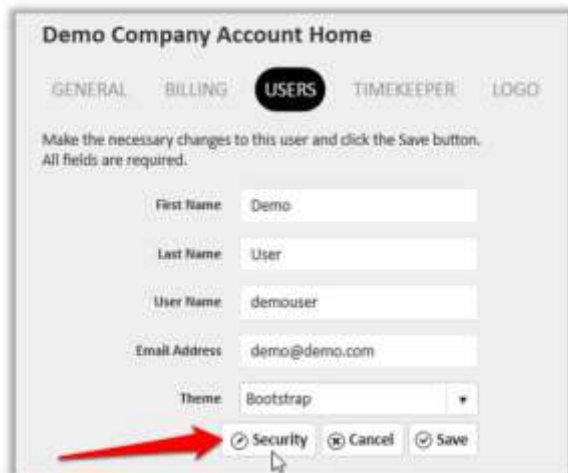


Figure 29

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

Demo Company Account Home

User successfully deleted. The user was deleted because they have never logged into the site.

GENERAL BILLING **USERS** TIMEKEEPER LOGO

Managing user security has now become much more flexible!

- Manually check/un-check the roles to manage access.

Back Save Changes

Account	Scorecard	Inspections	Work Orders	Inventory
<input checked="" type="checkbox"/> Account Manager Full access to all account page features.	<input checked="" type="checkbox"/> Scorecard Manager Full access to all scorecard page features.	<input checked="" type="checkbox"/> Inspection Manager Full access to all inspection features.	<input checked="" type="checkbox"/> Work Order Manager Full access to all work order features.	<input checked="" type="checkbox"/> Inventory Manager Full access to all inventory features.
<input checked="" type="checkbox"/> User Manager Full access to manage users, but read-only to other features.	<input checked="" type="checkbox"/> Scorecard Reader Read-only access to the scorecard page.	<input checked="" type="checkbox"/> Inspection Reader Read-only access to the inspection features.	<input checked="" type="checkbox"/> Work Order Reader Read-only access to the work order features.	<input checked="" type="checkbox"/> Inventory Reader Read-only access to the inventory features.

Clients	Employee Performance	Employees
<input checked="" type="checkbox"/> Client Manager Full access to all client features.	<input checked="" type="checkbox"/> Performance Manager Full access to all performance management features.	<input checked="" type="checkbox"/> Employee Manager Full access to all employee management features.
<input checked="" type="checkbox"/> Client Reader Read-only access to the client features, including budgets. <small>Please note: Client contact details will always be visible to all users; this access allows users to see budget details.</small>	<input checked="" type="checkbox"/> Performance Reader Read-only access to performance management features.	<input checked="" type="checkbox"/> Employee Reader Read-only access to employee management features.

Figure 30

Editing Existing Users

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

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

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



Figure 31

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

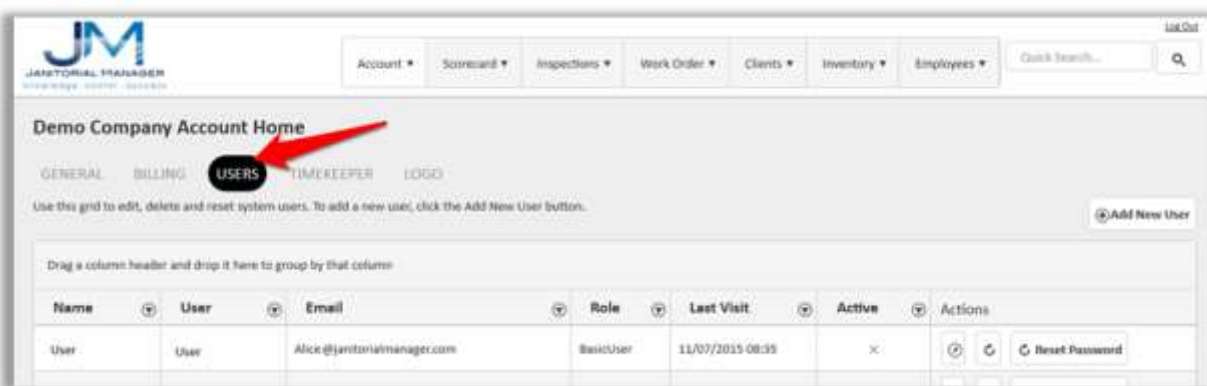


Figure 32

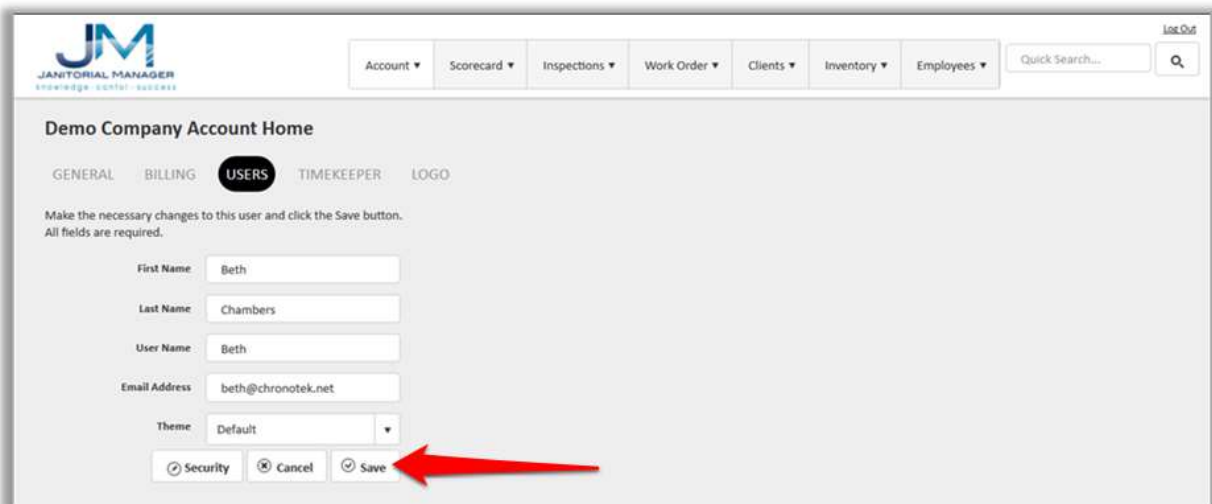
A list of current users will be displayed.

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



Figure 33

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



The screenshot displays the 'Demo Company Account Home' interface for Janitorial Manager. The top navigation bar includes the JM logo, a 'Log Out' link, and a search bar. Below this, a secondary navigation bar shows tabs for Account, Scorecard, Inspections, Work Order, Clients, Inventory, and Employees. The main content area is titled 'Demo Company Account Home' and features a sub-navigation bar with 'GENERAL', 'BILLING', 'USERS' (highlighted), 'TIMEKEEPER', and 'LOGO'. A message states: 'Make the necessary changes to this user and click the Save button. All fields are required.' The form contains the following fields: First Name (Beth), Last Name (Chambers), User Name (Beth), and Email Address (beth@chronotek.net). The Theme is set to Default. At the bottom, there are three buttons: Security, Cancel, and Save. A red arrow points to the Save button.

Figure 34

Reset User's Password

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

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

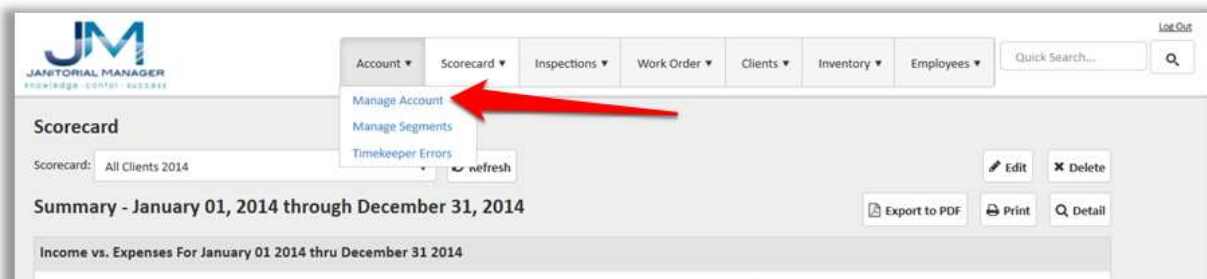


Figure 35

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

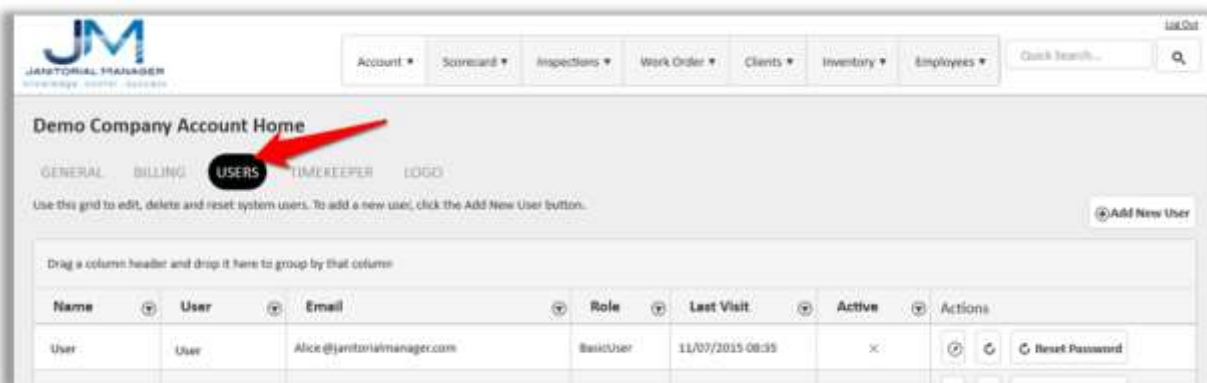


Figure 36

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

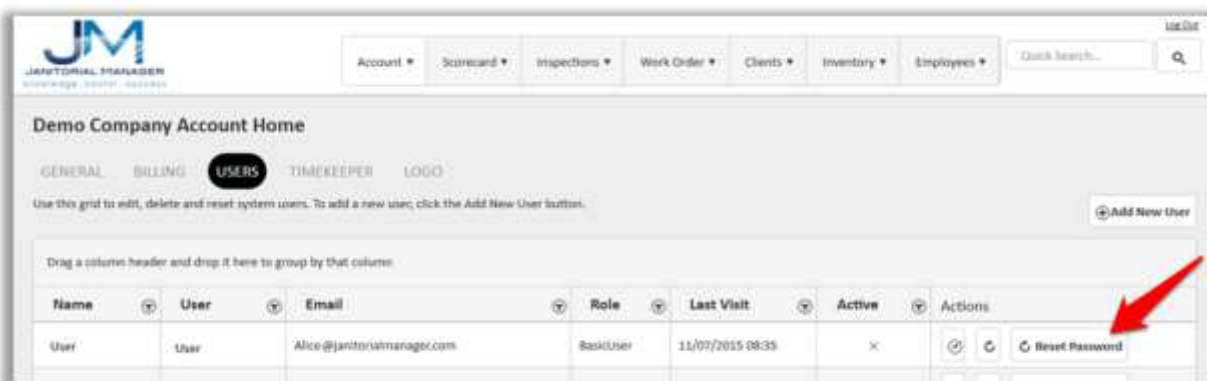


Figure 37

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

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

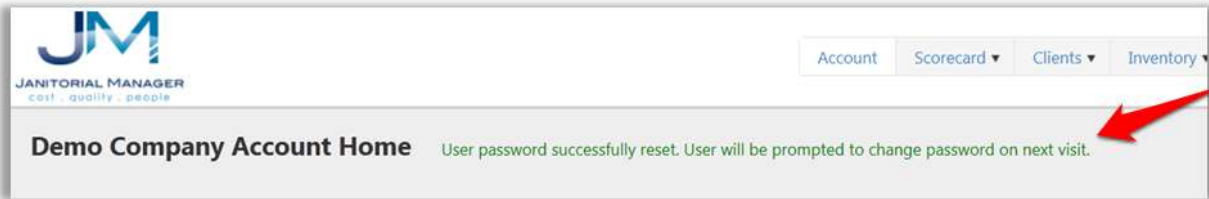


Figure 38

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



Figure 39

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

Deleting a User

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

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

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

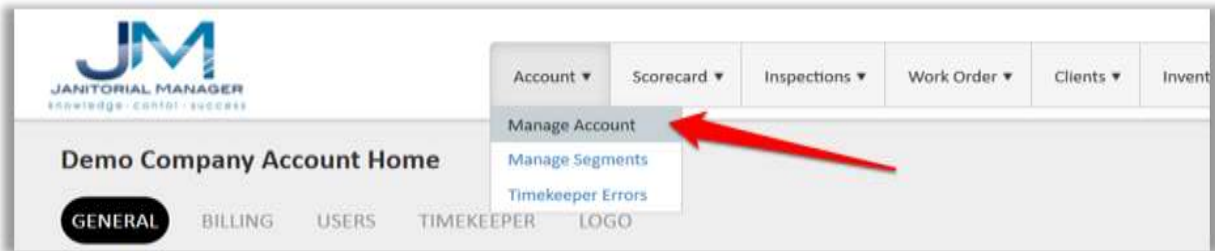


Figure 40

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

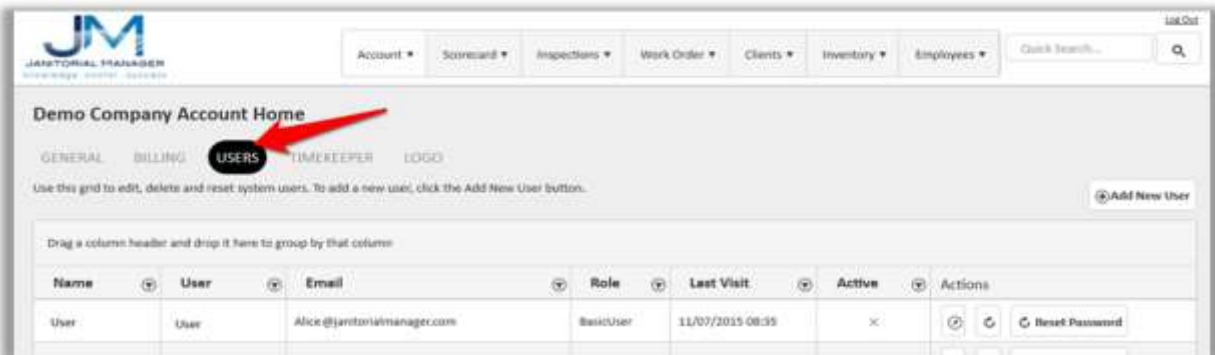


Figure 41

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



Figure 42

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



Figure 43

Re-Activating a deleted user

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

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

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

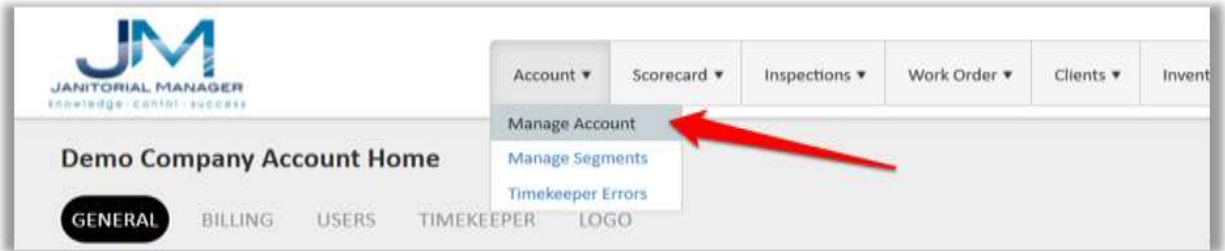


Figure 44

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



Figure 45

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

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



Figure 46

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



Greg Chasteen	gregchasteen	gregchasteen@janitorialmanager.com	AdminUser	Bootstrap	02/11/2014 17:53				Reset Password
Mike Someone	MikeSomeone	MikeSomeone@email.com	AdminUser	Bootstrap	01/17/2014 18:43	x			
John Doe	johndoe	gregchasteen@janitorialmanager.com	BasicUser	Default	02/12/2014 18:55	x			

1 - 5 of 5 items

Figure 47

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



Figure 48

Customize JM with your company logo

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

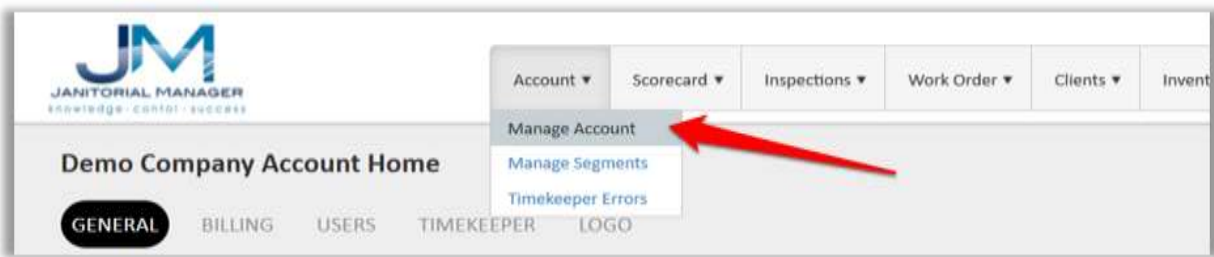


Figure 49

Select the Logo tab as shown below in Figure 50.

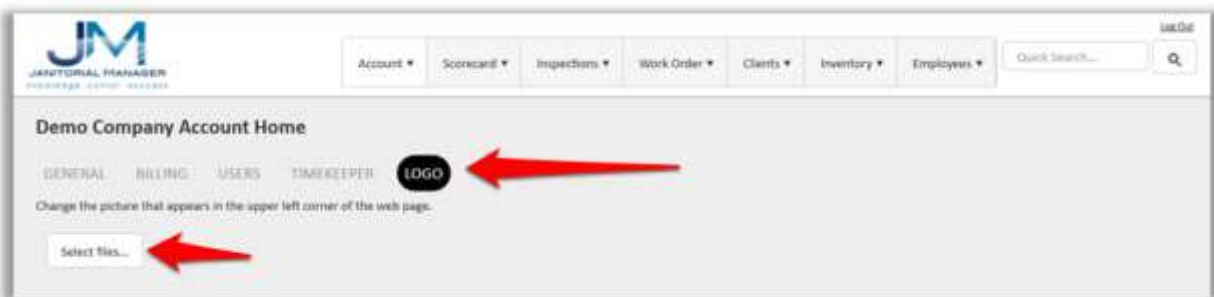


Figure 50

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

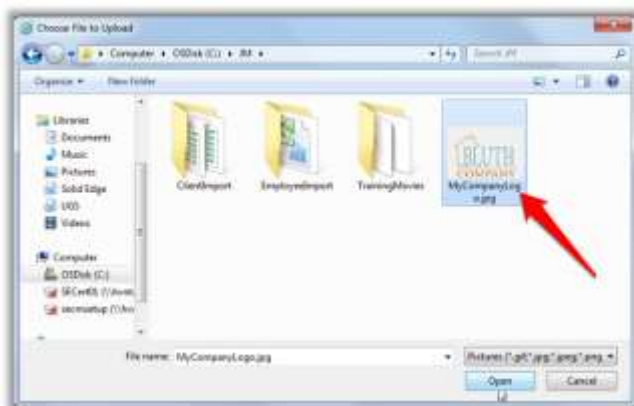


Figure 51

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



Figure 52

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

Time Keeping Set Up

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

Enabling Timekeeper Features

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

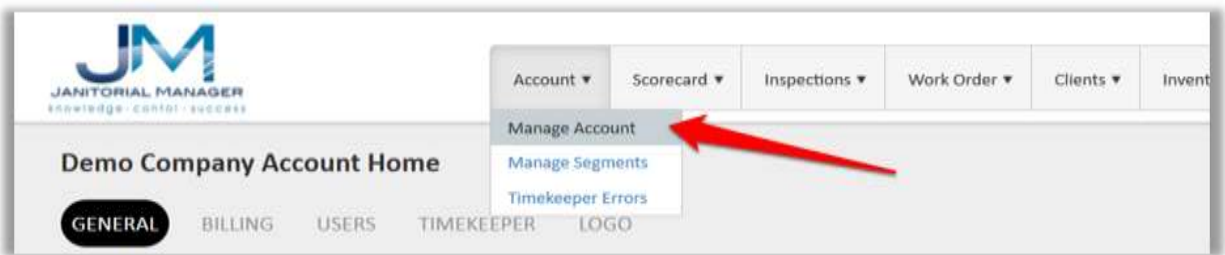


Figure 53

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

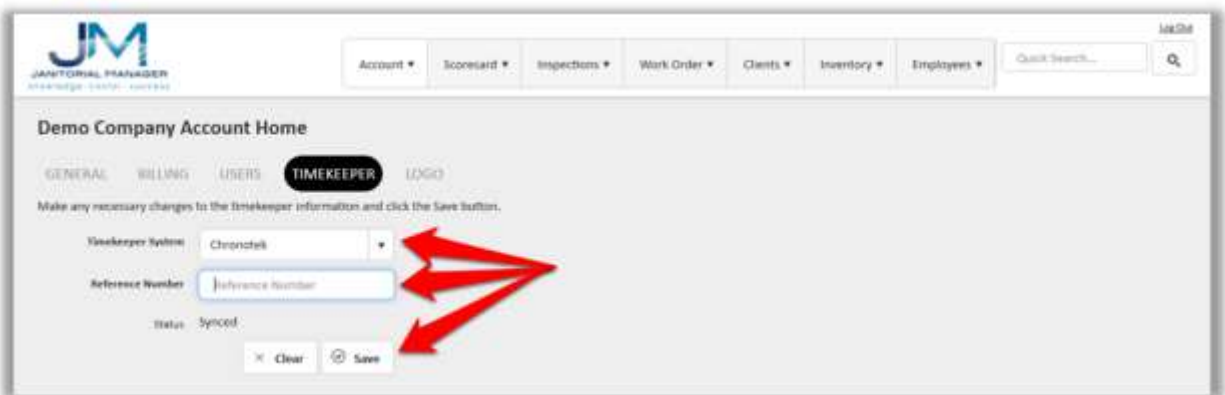


Figure 54

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

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

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

STOP!

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

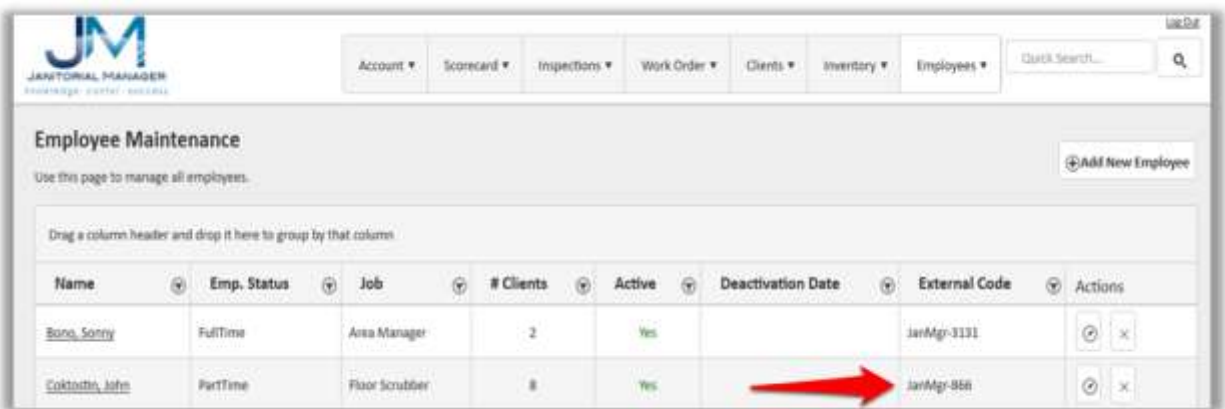
Scenario 1: Currently Using Both JM and Chronotek

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

Employee Synchronization

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







Name	Emp. Status	Job	# Clients	Active	Deactivation Date	External Code	Actions
Bono, Sonny	FullTime	Area Manager	2	Yes		JanMgr-3131	 
Cokotkin, John	PartTime	Floor Scrubber	8	Yes		JanMgr-866	 

Figure 55

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

- g. Paste the copied value into the External Code 1 field
- i. If External Code 1 is full, use External Code 2

CHRONOTEK Smart Time Tracking

Employee Call-In: 1-855-499-7172

View: show: Active Only Search:

Basic Setup Personal Info **Advanced** Mobile Access Notes

Caution: These advanced settings are provided to handle special-case scenarios. Please contact Chronotek Support for assistance.

Supervisor Alerts ☐ All Check-Ins ☐ All Check-Outs

Random Voice Verification ☐ Disabled (default)

Name Recording

Auto Safeguard for Missed Clock-Outs

Reset Timecard after 16 hours

- This is a safeguard feature for employees who forget to clock out.
- The best setting is 4+ hours longer than employee's normal shift.
- An employee CANNOT clock out after this length of time.
- Timecards marked (A) need to be edited to reflect actual time worked.

External Code 1 JanMgr-866

External Code 2

Figure 56

- ii. If both External Code fields are full, please contact JM and Chronotek Support
- h. Click save
8. Go back to step 7 and repeat for each employee in the Chronotek list of employees
9. Within Chronotek, click the List Maintenance -> Employees item
10. Click the excel icon to download an excel file containing all Chronotek Employees, save this file to your computer hard drive.

CHRONOTEK Smart Time Tracking

show: All Search:

Dashboard List Maintenance Zones Employees Jobs

Zone	Access C	Name	Status	M
1000	162148	Blooth, Franklin	termi...	
1000	162533	Blooth, Franklin	termi...	
1000	162820	Blooth, Franklin	out	
1000	162716	Bono, Sonny	out	
1000	162161	Coktostin, John	out	
1000	162796	Cooper, Alice	out	
1000	162162	Employee, Ellen J.	out	

Figure 57

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

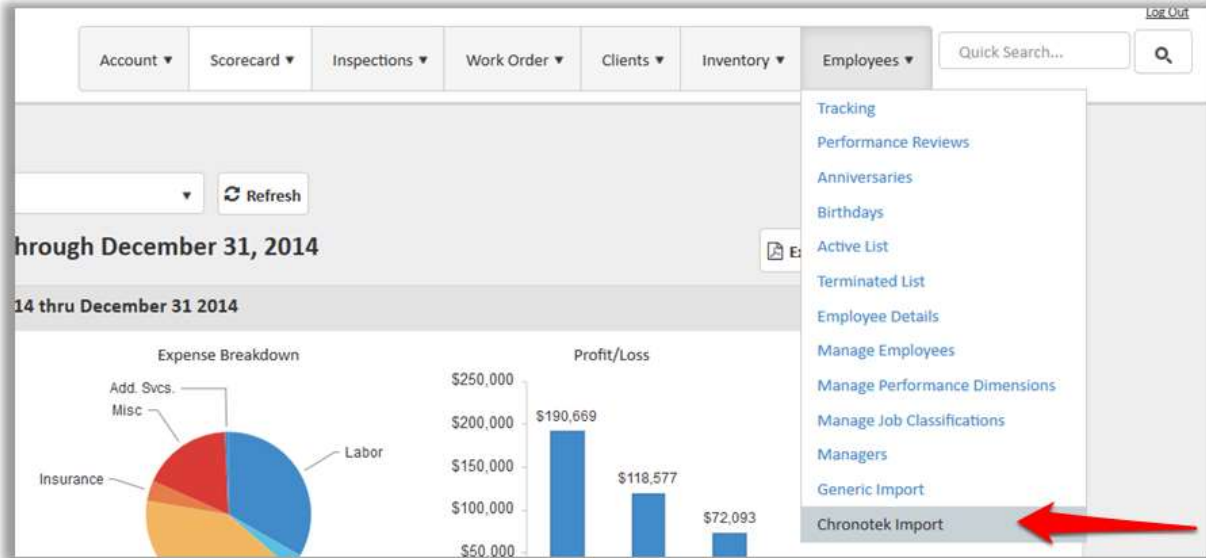


Figure 58

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

Where should I create new employee records?

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

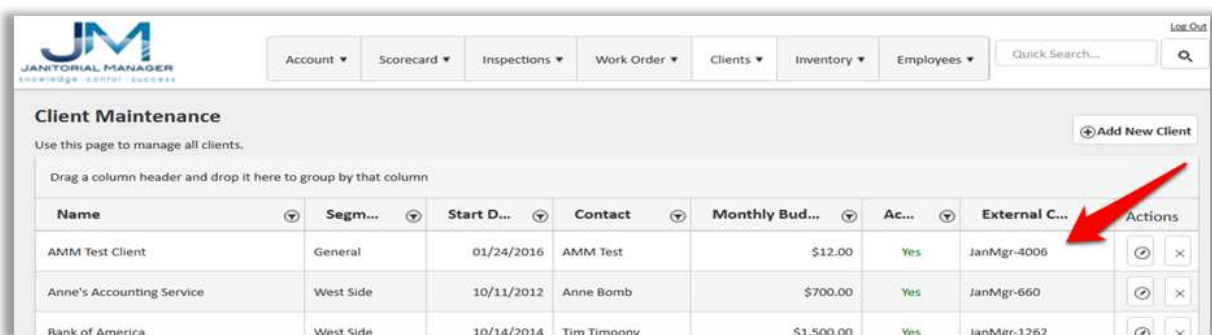
What about employee changes that occur after the synchronization is complete?

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

Client Synchronization

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

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



The screenshot shows the 'Client Maintenance' page in Janitorial Manager. The page has a navigation bar with tabs: Account, Scorecard, Inspections, Work Order, Clients, Inventory, and Employees. Below the navigation bar is a 'Client Maintenance' section with a sub-header 'Use this page to manage all clients.' and an 'Add New Client' button. A table is displayed with columns: Name, Segm..., Start D..., Contact, Monthly Bud..., Ac..., External C..., and Actions. A red arrow points to the 'External C...' column header. The table contains three rows of client data.

Name	Segm...	Start D...	Contact	Monthly Bud...	Ac...	External C...	Actions
AMM Test Client	General	01/24/2016	AMM Test	\$12.00	Yes	JanMgr-4006	[Refresh] [Delete]
Anne's Accounting Service	West Side	10/11/2012	Anne Bomb	\$700.00	Yes	JanMgr-660	[Refresh] [Delete]
Bank of America	West Side	10/14/2014	Tim Timony	\$1,500.00	Yes	JanMgr-1262	[Refresh] [Delete]

Figure 59

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

- f. In the Chronotek Advanced pane, find the External Code 1 field
- g. Paste the copied value into the External Code 1 field

The screenshot shows the Chronotek Advanced pane for job editing. The left sidebar contains navigation links: Dashboard, List Maintenance (Zones, Employees, Jobs, Phones, Activity Codes), Payroll Functions, Snapshot Settings, Scheduling, and Communications. The main area displays a list of jobs with columns: Zone, Job Code, Job Name, and Location. A red arrow points to the 'External Code 1' field, which contains the value 'JanMgr-1262'. Other fields include 'External Code 2', 'External Code 3', 'Budgeted Hours' (0.00), 'Service Item' (< None Specified >), and 'Pay Type' (< None Specified >). A warning message at the top states: 'Use this page to store information about your jobs. Required fields are labeled with an asterisk (*) all others are optional.' At the bottom right are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the Chronotek Jobs list. The left sidebar has navigation links: Dashboard, List Maintenance (Zones, Employees, Jobs, Phones), Payroll Functions, Snapshot Settings, Scheduling, and Communications. The main area displays a table of jobs with columns: Zone, Access C, Name, Status, and M. A red arrow points to the 'show: All' dropdown menu. Another red arrow points to the download icons (Excel and PDF) in the top right corner of the table.

Zone	Access C	Name	Status	M
1000	162148	Blooth, Franklin	termi...	
1000	162533	Blooth, Franklin	termi...	
1000	162820	Blooth, Franklin	out	
1000	162716	Bono, Sonny	out	
1000	162161	Coktostin, John	out	
1000	162796	Cooper, Alice	out	
1000	162162	Employee, Ellen J.	out	

Figure 61

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

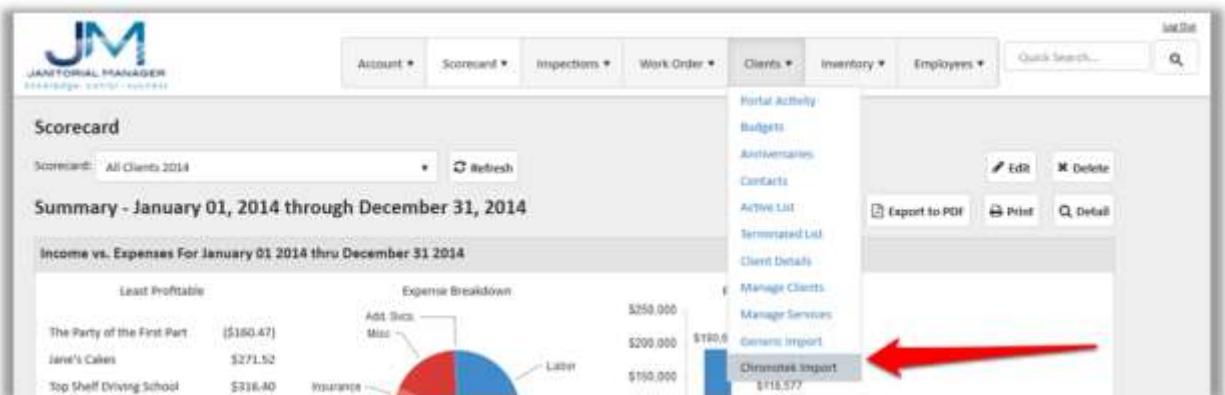


Figure 62

12. Browse and select the previously saved excel file containing Chronotek Jobs

13. Click Upload Chronotek Workbook

14. This may take a few minutes to process

15. Review the results

- If all records uploaded successfully then the synchronization is complete
- If errors occurred, perform the following steps (do not close your error window):
 - Open a new browser tab and log into JM
 - Read each error carefully
 - Janitorial Manager client record with External Code <code> was not found for <Job Name>
 - An invalid JM Client External Code was saved on the Chronotek Job record, this is likely a data entry error.
 - Go back into Chronotek and fix the error for the specified client
 - 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.
 - Once errors are corrected, go back to Step 9 and attempt the process again.

Where should I create new client records?

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

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

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

Scenario 2: Current Chronotek User, New to JM

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

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

Employee Import from Chronotek

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

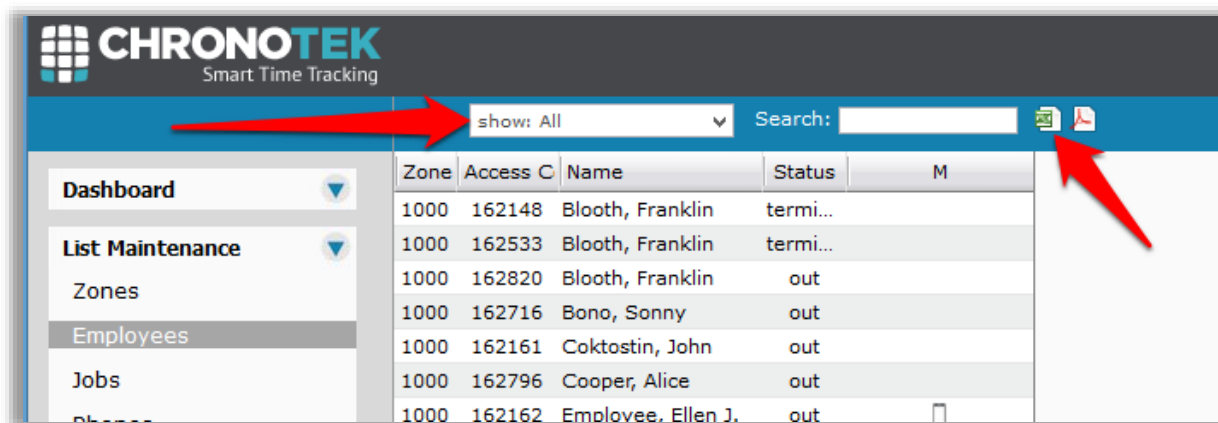


Figure 63

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

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

Figure 64

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

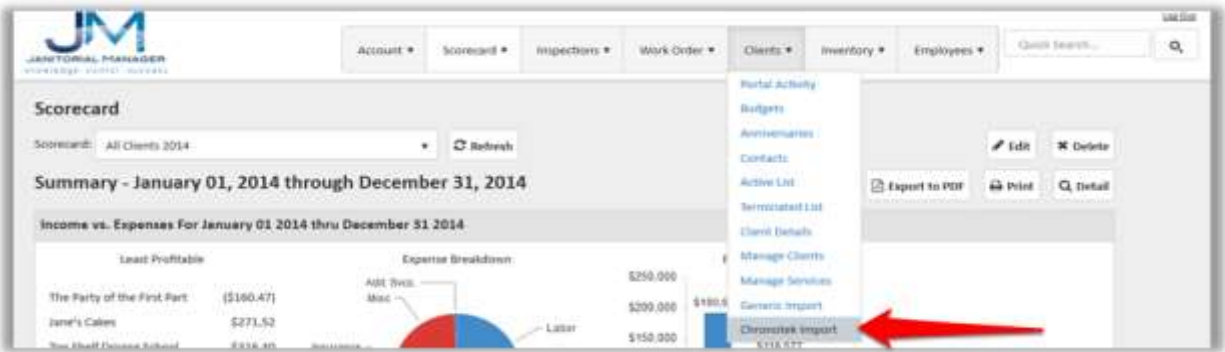


Figure 65

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

Client Import from Chronotek

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

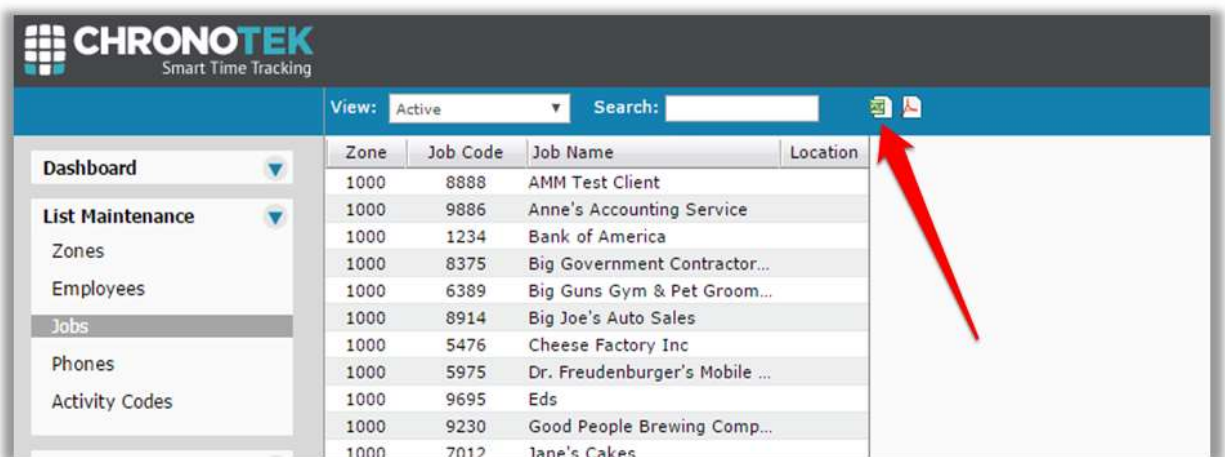


Figure 66

4. Log into Janitorial Manager

5. Go to Clients -> Chronotek Import

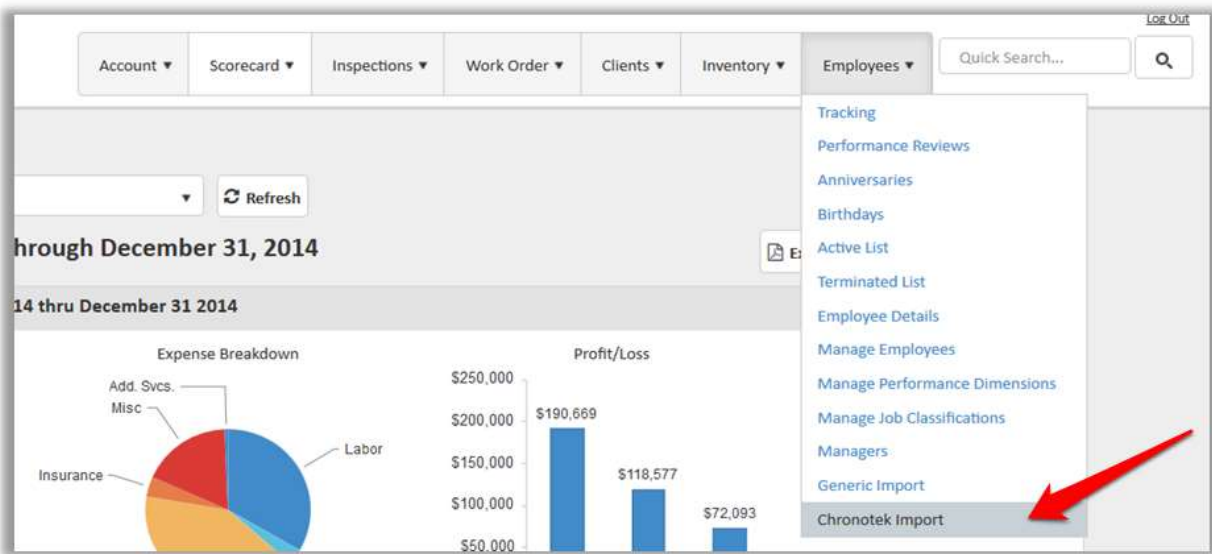


Figure 67

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

Scenario 3: Existing JM User, New to Chronotek

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

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

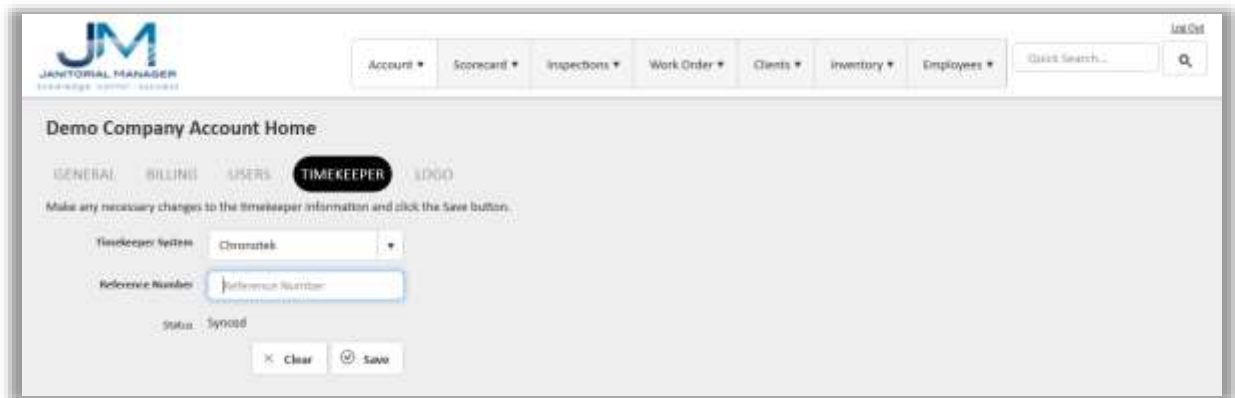


Figure 68

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

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

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

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

Reviewing Errors

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

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

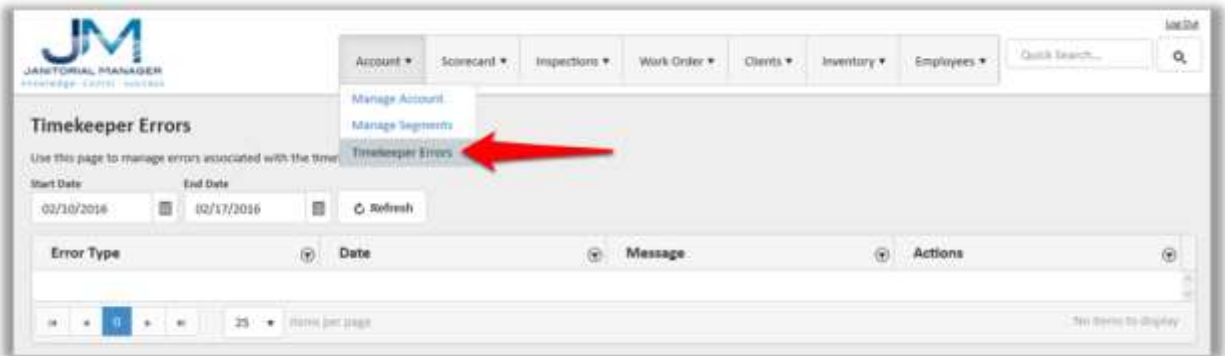


Figure 69

Manage Clients

Clients can be added to Janitorial Manager either by importing a properly formatted Excel spreadsheet or entered individually. It is important to note that batch importing clients using a spreadsheet 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 add new customers to your business they will need to be added to JM individually with the Add New Client command.

Add New Client

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

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

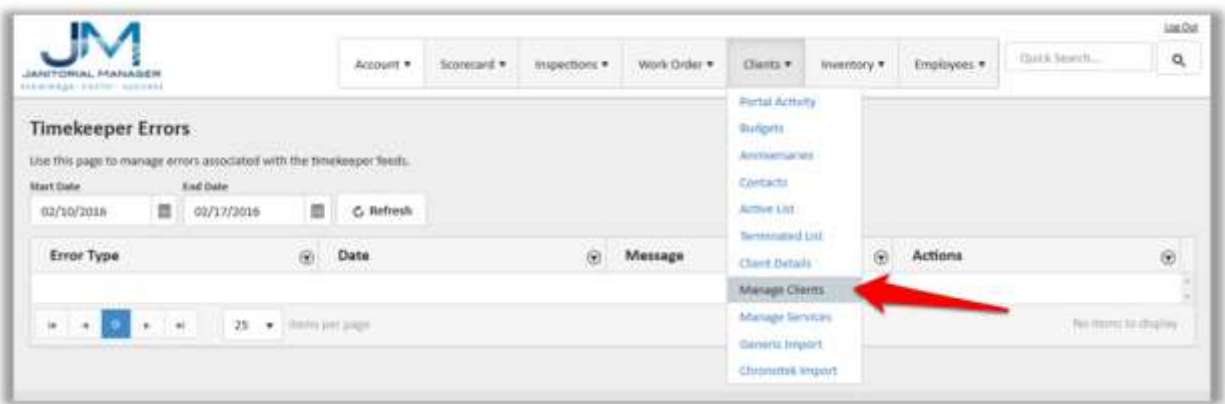


Figure 70

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

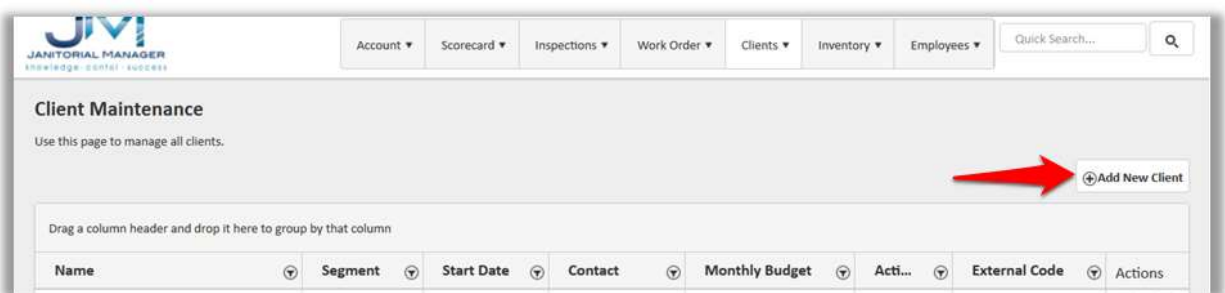


Figure 71

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

The screenshot displays the 'Client Maintenance' interface for 'The Derek Zoolander School for Kids who can't read too good'. The 'GENERAL' tab is active, showing fields for Name, Type, Start Date, Notes, Timekeeper Ref. Id, Timezone, Budget Information, Address Information, Billing Information, Primary Contact Information, and Secondary Contact Information. A red arrow points to the 'Save' button in the top right corner of the form.

Client Maintenance
Update the client details and click the save button when finished.

Change Client: The Derek Zoolander School for Kids who can't read too good

GENERAL SERVICES ASSIGNMENTS PORTAL PORTAL USERS

General Information

Name: The Derek Zoolander School for Kids who can't read too good

Type: Billable Start Date: 12/2/2012

Notes:

Timekeeper Ref. Id: 3483 Generate Timezone: Central

Budget Information

Rate: \$1,800.00 Paper: \$100.00

Floor: \$300.00 Window: \$100.00

Lawn: \$100.00 Other: \$0.00

Monthly Total: \$2,300.00 % Supply Usage Goal: 3.00

Primary Contact Information

First Name: Derek Last Name: Zoolander

Email Address: Model1@hotmail.com Fax:

Office Phone: (252) 222-2222 Extension:

Emergency Contact Notes:

Inspection Information

Monthly Inspection: ☒ Spare Key: ☒

Location Number: 567

Alarm Code: 7

Address Information

Street Address: 7 Pansy Street

City: Huntville State: AL Zip: 35775

Billing Information

Building Name: 00 Budgeted Wkly Hrs: 10.00

Street Address: 7 Pansy Street Same As Above: ☐

Secondary Contact Information

First Name: Maury Last Name: Solstein

Email Address: Bailstein@DZSK.com Fax:

Office Phone: (332) 995-9632 Extension:

Emergency Contact Notes:

Figure 72

Import Clients

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

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

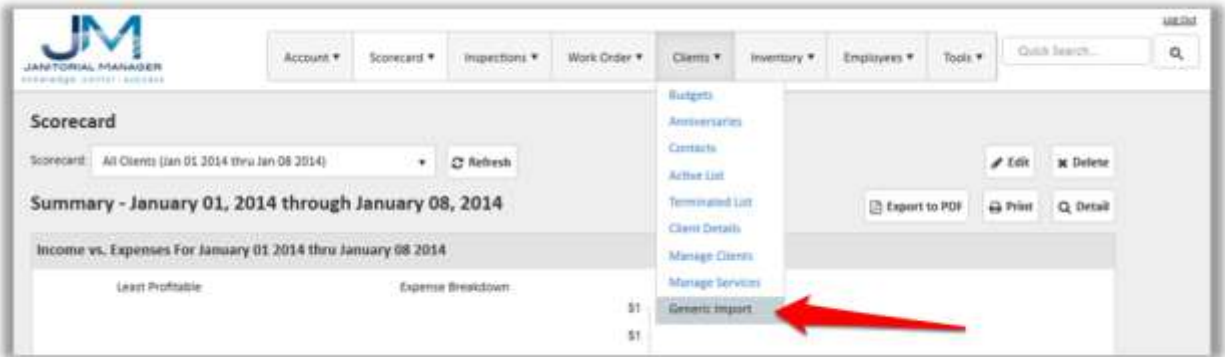


Figure 73

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

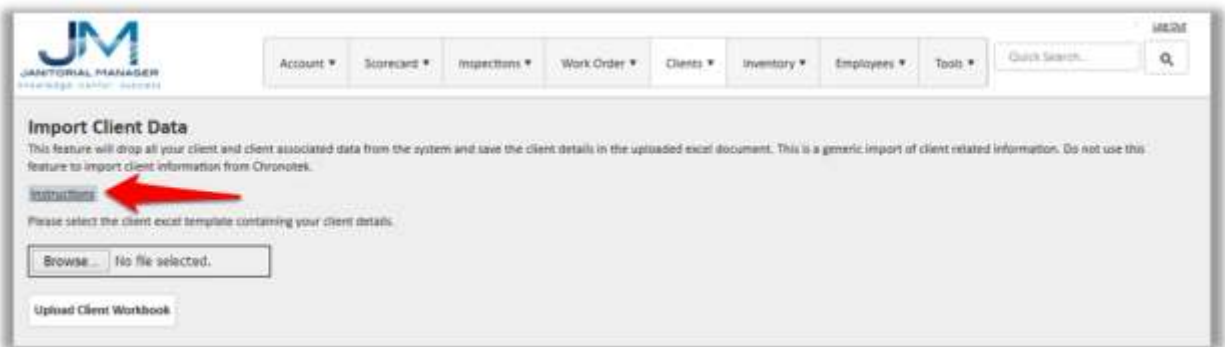


Figure 74

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

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

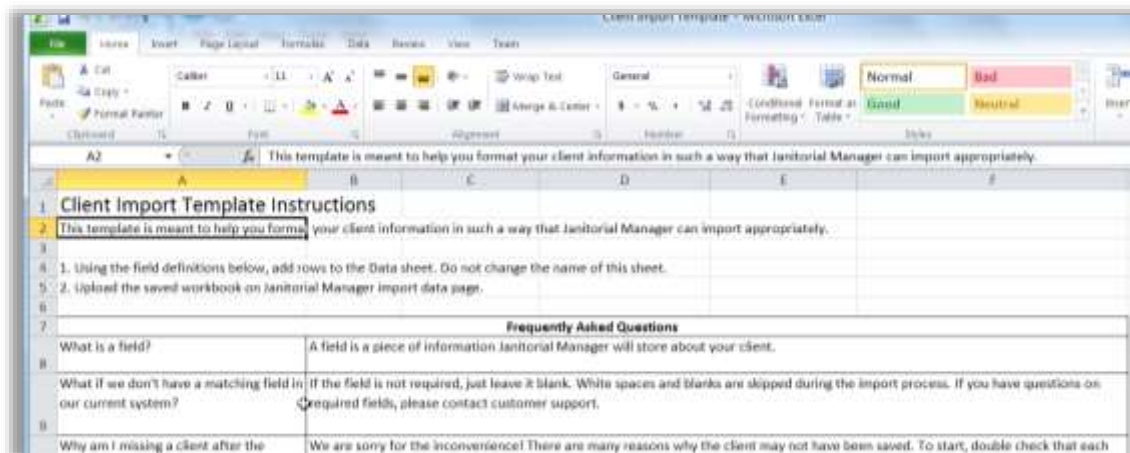


Figure 75

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

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

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

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

Figure 76

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

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

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

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

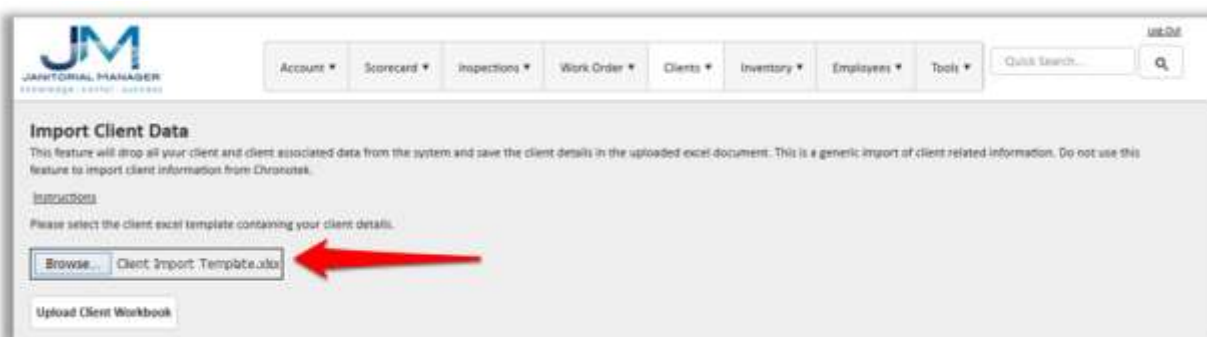


Figure 77

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

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

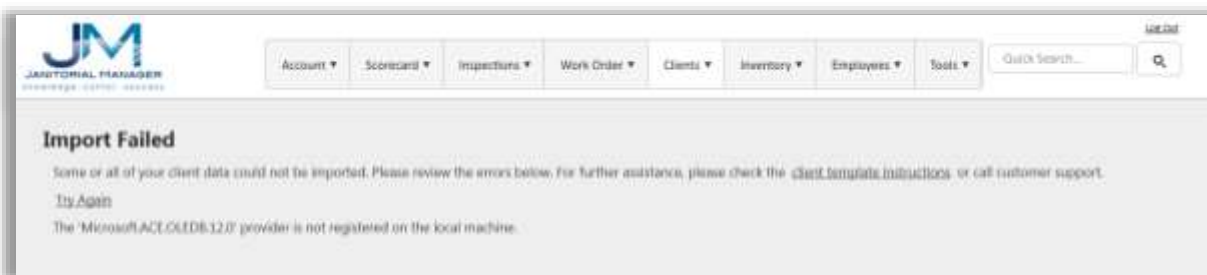


Figure 78

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

Editing Existing Clients

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

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

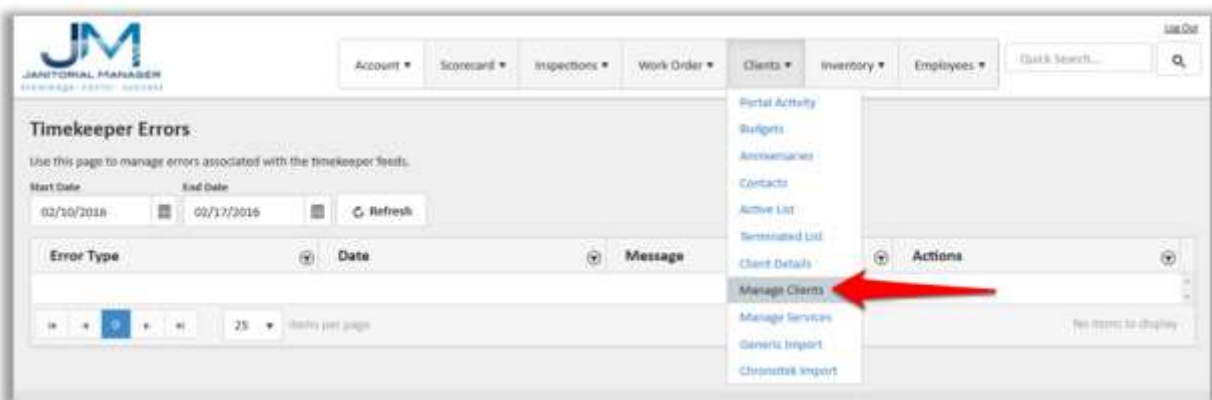


Figure 79

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

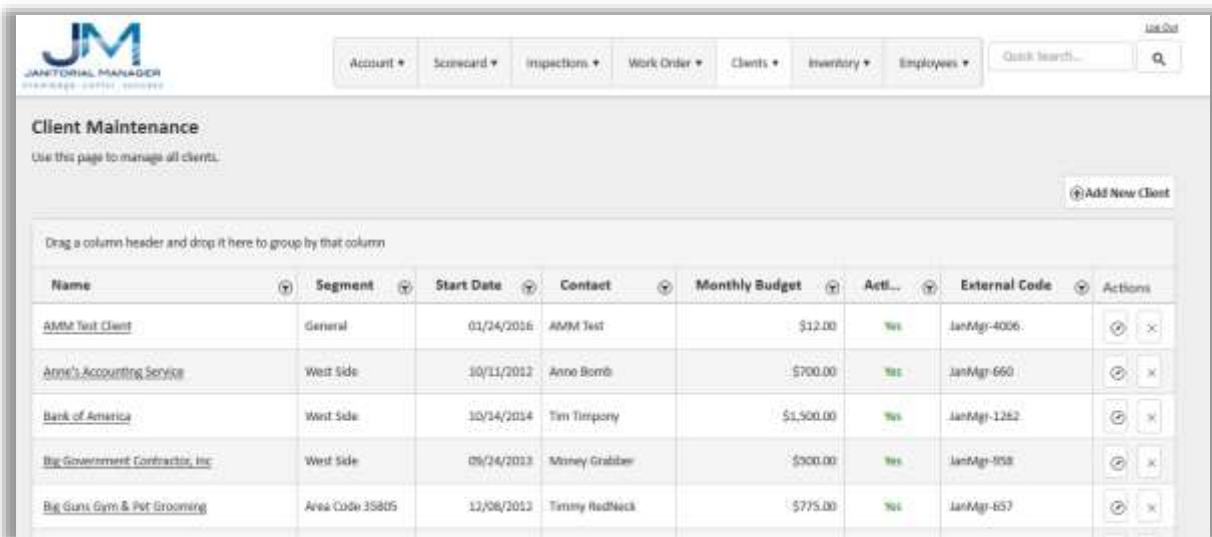
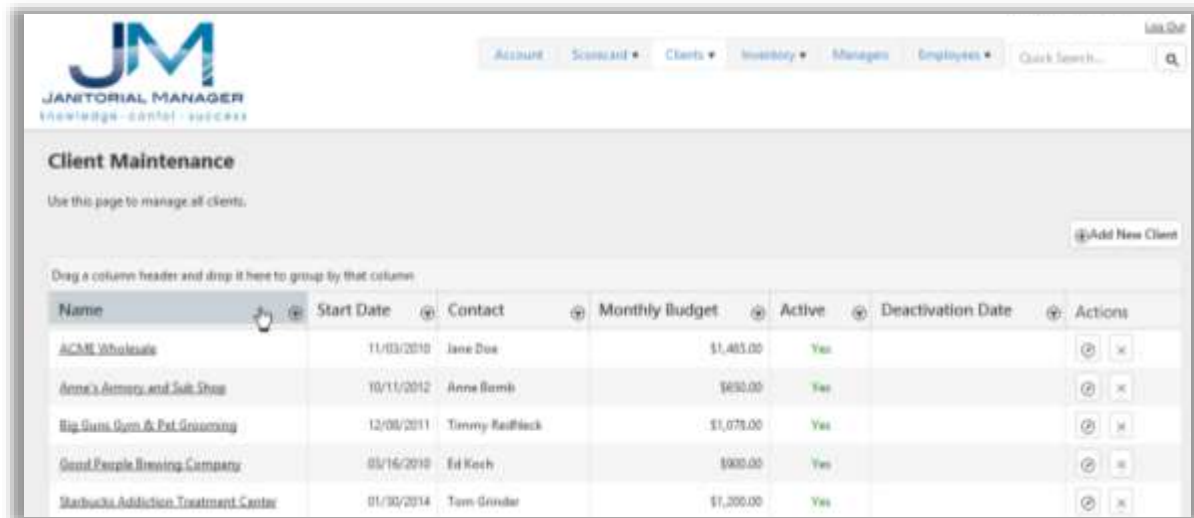


Figure 80

Searching for Existing clients

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

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



Client Maintenance
Use this page to manage all clients.

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

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
ACME Wholesale	11/03/2010	Jane Doe	\$1,483.00	Yes		[Edit] [X]
Anne's Armory and Suit Shop	10/11/2012	Anne Bomb	\$630.00	Yes		[Edit] [X]
Big Sam's Gym & Pet Grooming	12/08/2011	Timmy RedBlack	\$1,078.00	Yes		[Edit] [X]
Good People Brooming Company	05/16/2010	Ed Koch	\$900.00	Yes		[Edit] [X]
Starbucks Addiction Treatment Center	01/30/2014	Tom Grinder	\$1,200.00	Yes		[Edit] [X]

Figure 81

2. You can switch between pages by selecting the specific page number shown or 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	01/30/2014	Tom Grinder	\$1,200.00	Yes		[Edit] [X]
Sunshine Carpet Cleaners	01/25/2010	Matthew Wilhelm	\$600.00	Yes		[Edit] [X]
The Derek Zoolander School for Kids	12/01/2011	Derek Zoolander	\$2,100.00	Yes		[Edit] [X]
The Office	12/10/2010	Michael Scott	\$775.00	Yes		[Edit] [X]
Timmy's Car Lot (inactive)	12/03/2010	Tan Spankenhammer	\$775.00	No	03/24/2014 11:25	[Edit] [X]
Top Shelf Driving School	12/10/2011	Ted Nugent	\$125.00	Yes		[Edit] [X]

1 - 10 of 11 items

Figure 82

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

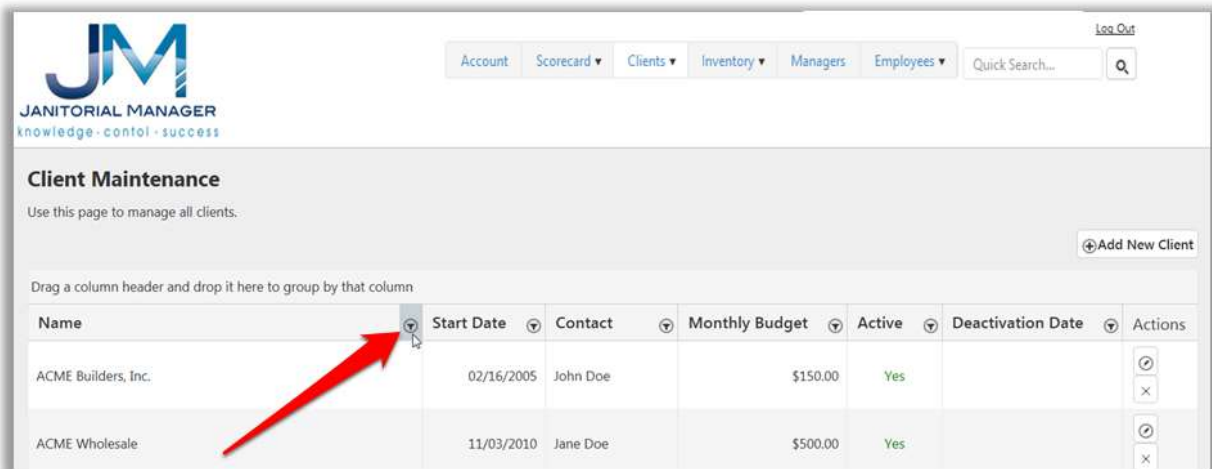


Figure 83

The following form will be displayed.

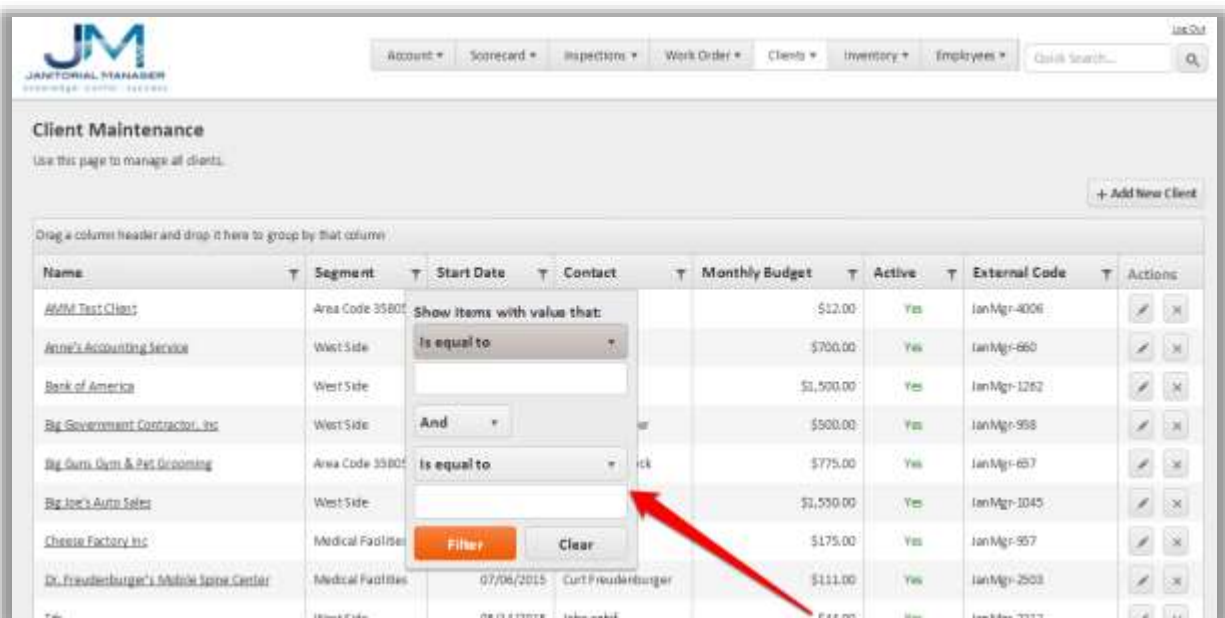


Figure 84

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

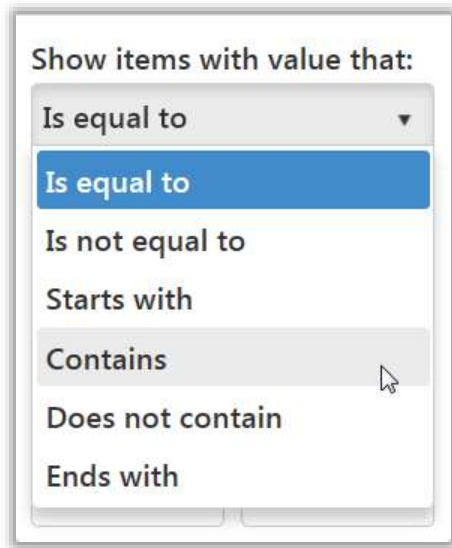


Figure 85

- In the value field enter “the”

A screenshot of a search filter interface. It features a dropdown menu labeled "Show items with value that:" with "Contains" selected. Below this is a text input field containing the word "the". Further down is an "And" dropdown menu, followed by another dropdown menu labeled "Is equal to" and an empty text input field. At the bottom are two buttons: "Filter" and "Clear".

Figure 86

- Click the **Filter** command

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

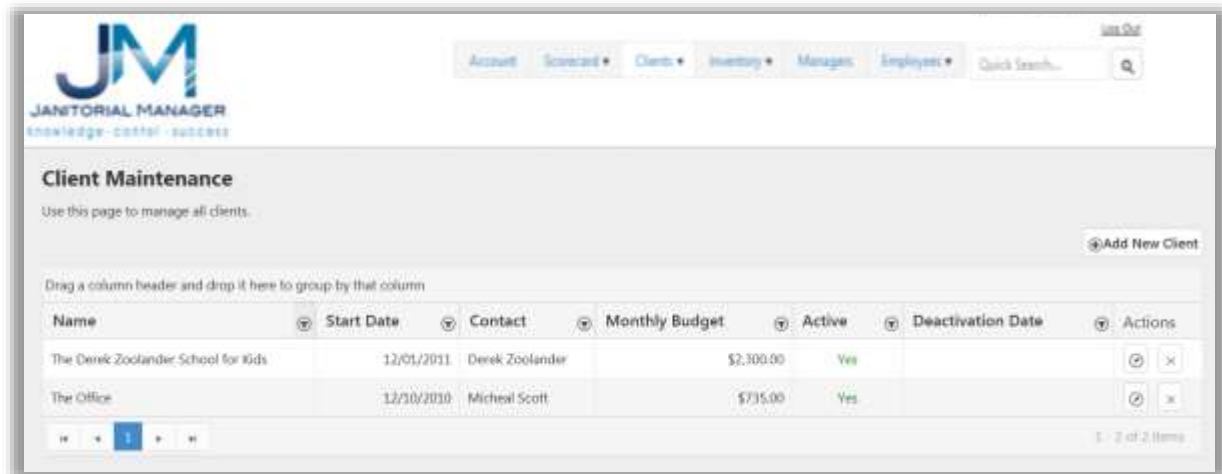


Figure 87

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

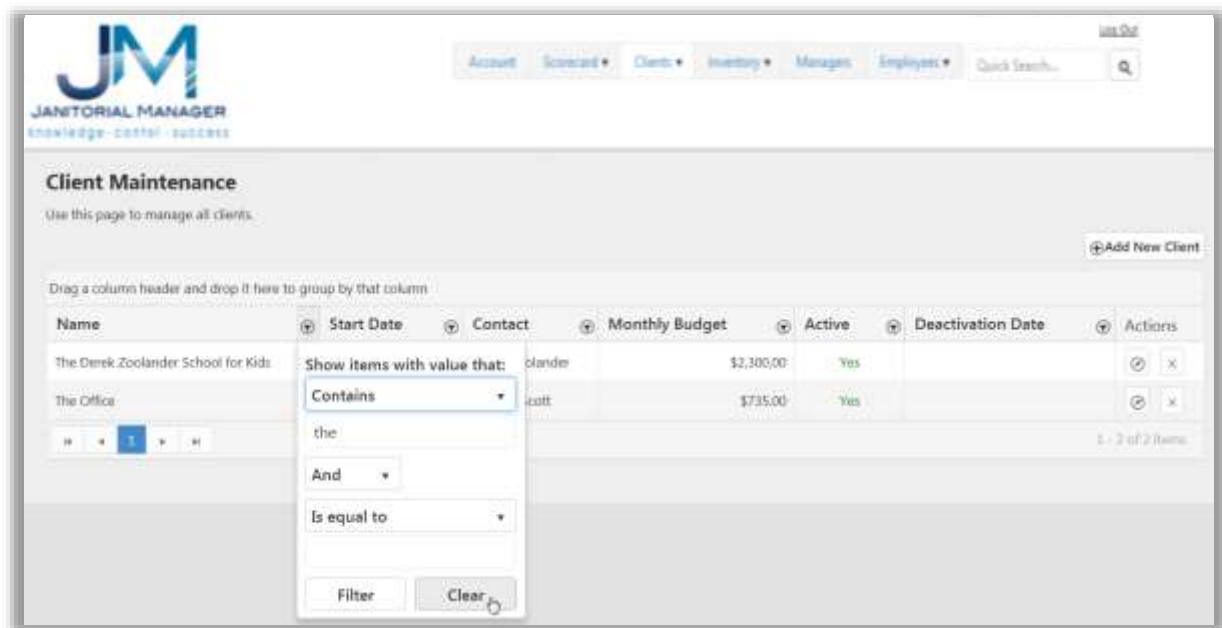


Figure 88

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

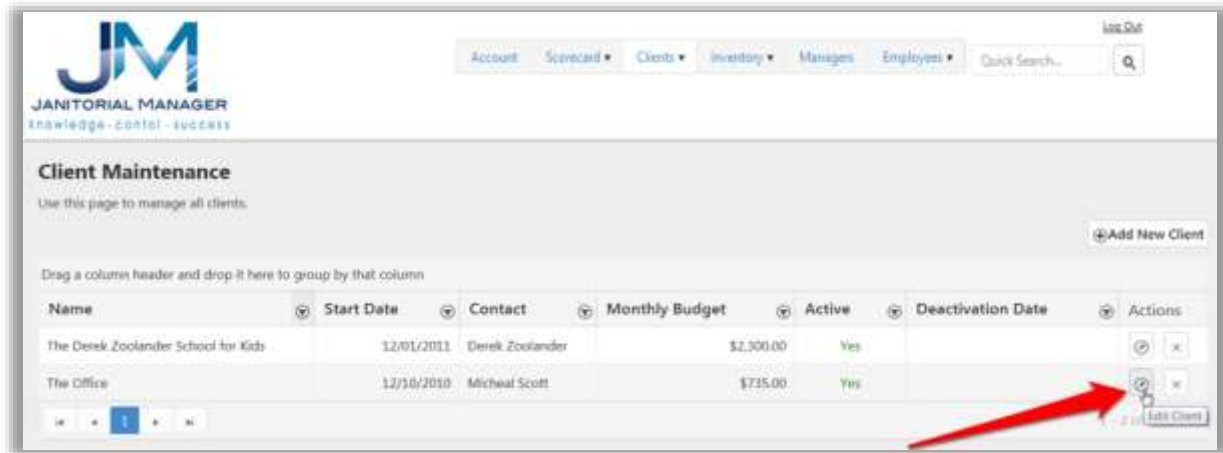


Figure 89

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

The screenshot shows the 'Client Maintenance' form with the 'GENERAL' tab selected. The form contains various input fields for client details, budget, contact information, inspection, address, building, and billing. The 'Save' button is visible at the top right of the form.

Figure 90

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

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

De-activating a Client

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

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

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

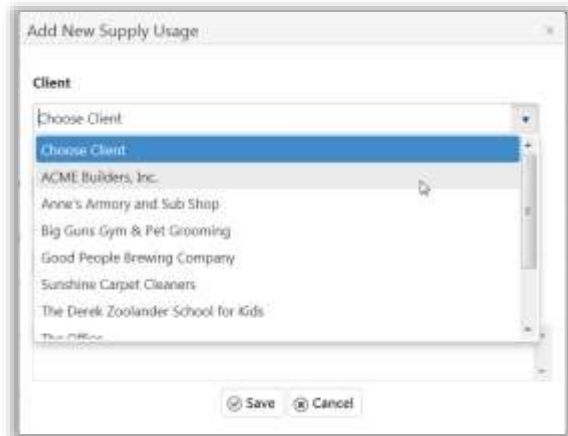


Figure 91

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

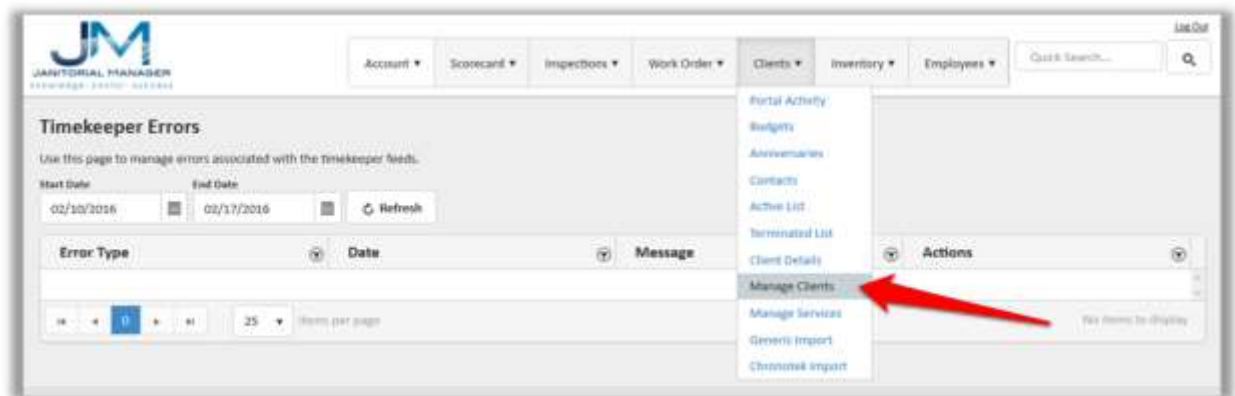
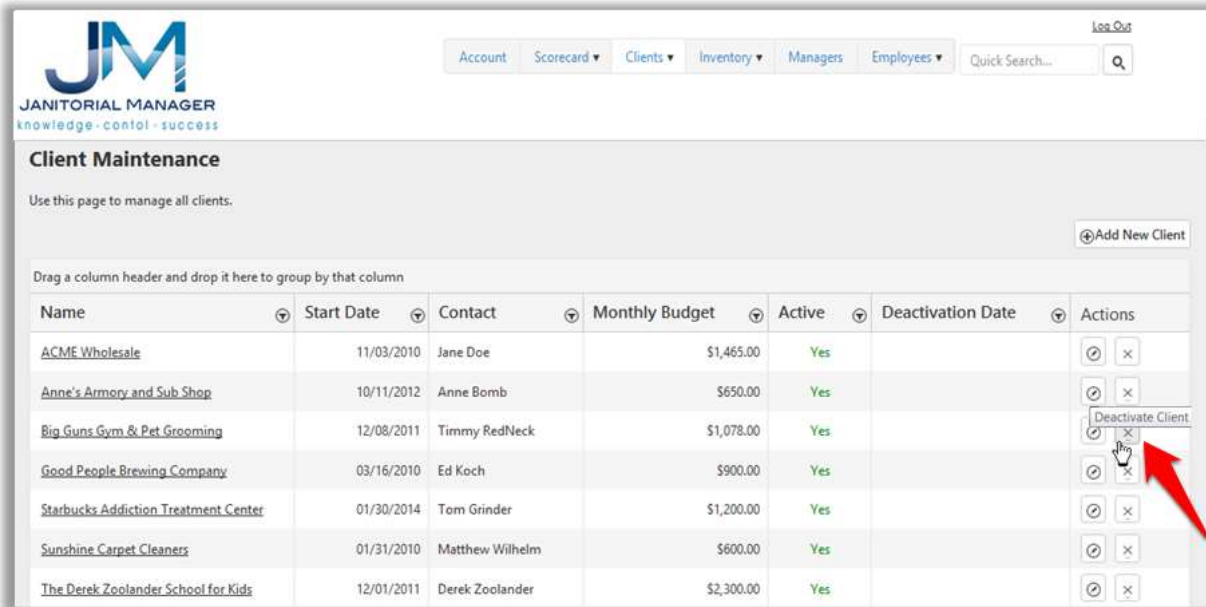


Figure 92

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

Note: For help on searching for specific clients by name - [Click Here...](#)

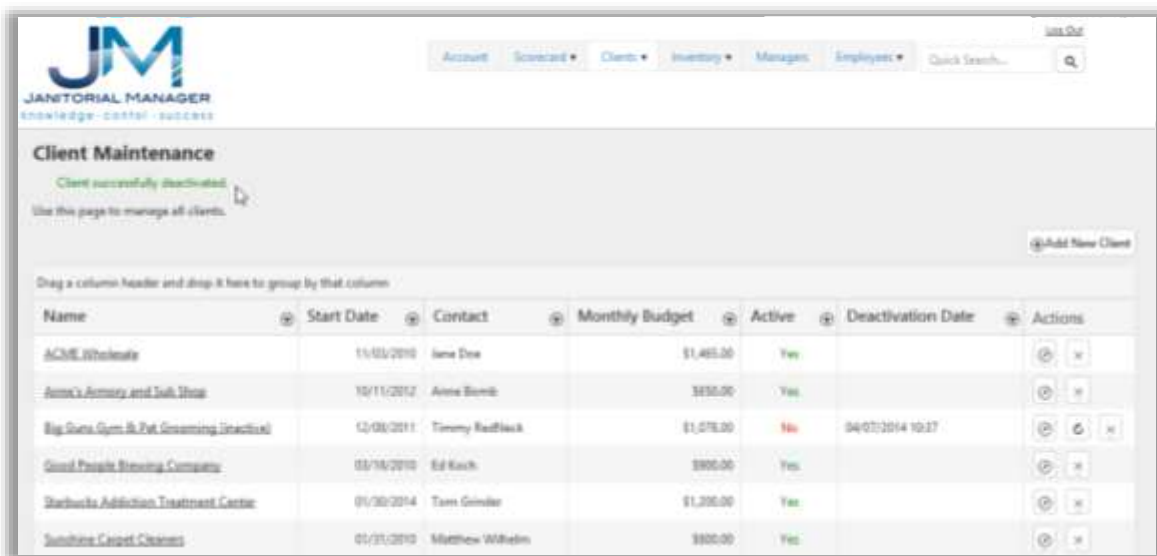


The screenshot shows the 'Client Maintenance' page in the Janitorial Manager software. The page has a navigation bar with tabs for Account, Scorecard, Clients, Inventory, Managers, and Employees. A search bar is also present. Below the navigation bar, there is a section for 'Client Maintenance' with a sub-header 'Use this page to manage all clients.' and an 'Add New Client' button. A table lists several clients with columns for Name, Start Date, Contact, Monthly Budget, Active status, and Deactivation Date. The 'Active' column shows 'Yes' for all clients. The 'Actions' column contains icons for editing and deleting. A red arrow points to the 'Deactivate Client' button (a circle with an 'X') in the Actions column for the client 'Big Guns Gym & Pet Grooming'.

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
ACME Wholesale	11/03/2010	Jane Doe	\$1,465.00	Yes		[Edit] [X]
Anne's Armory and Sub Shop	10/11/2012	Anne Bomb	\$650.00	Yes		[Edit] [X]
Big Guns Gym & Pet Grooming	12/08/2011	Timmy RedNeck	\$1,078.00	Yes		[Edit] [X] [Deactivate Client]
Good People Brewing Company	03/16/2010	Ed Koch	\$900.00	Yes		[Edit] [X]
Starbucks Addiction Treatment Center	01/30/2014	Tom Grinder	\$1,200.00	Yes		[Edit] [X]
Sunshine Carpet Cleaners	01/31/2010	Matthew Wilhelm	\$600.00	Yes		[Edit] [X]
The Derek Zoolander School for Kids	12/01/2011	Derek Zoolander	\$2,300.00	Yes		[Edit] [X]

Figure 93

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



The screenshot shows the 'Client Maintenance' page after a client has been successfully deactivated. A green message 'Client successfully deactivated' is displayed at the top. The table now shows the client 'Big Guns Gym & Pet Grooming' as 'Inactive' (red text) and has a deactivation date of '04/01/2014 10:27'. The 'Actions' column for this client now includes an additional icon (a circle with a checkmark) next to the 'Deactivate Client' button.

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
ACME Wholesale	11/03/2010	Jane Doe	\$1,465.00	Yes		[Edit] [X]
Anne's Armory and Sub Shop	10/11/2012	Anne Bomb	\$650.00	Yes		[Edit] [X]
Big Guns Gym & Pet Grooming (Inactive)	12/08/2011	Timmy RedNeck	\$1,078.00	No	04/01/2014 10:27	[Edit] [X] [Deactivate Client]
Good People Brewing Company	03/16/2010	Ed Koch	\$900.00	Yes		[Edit] [X]
Starbucks Addiction Treatment Center	01/30/2014	Tom Grinder	\$1,200.00	Yes		[Edit] [X]
Sunshine Carpet Cleaners	01/31/2010	Matthew Wilhelm	\$600.00	Yes		[Edit] [X]

Figure 94

Re-activating a client

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

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

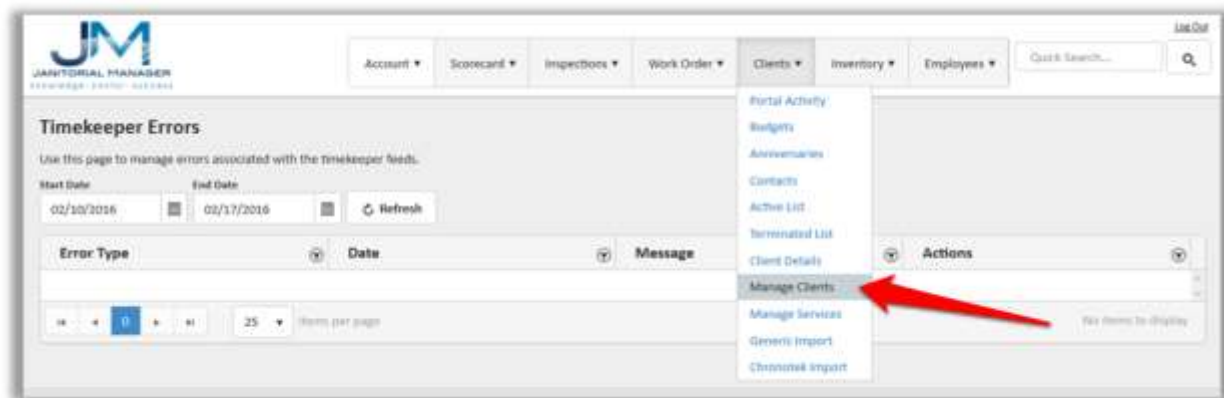


Figure 95

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

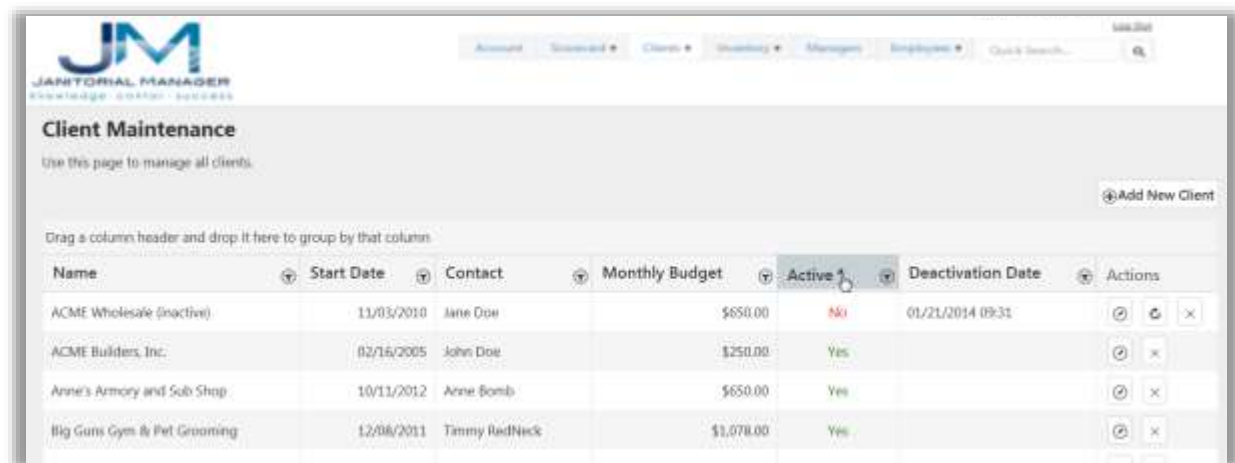


Figure 96

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

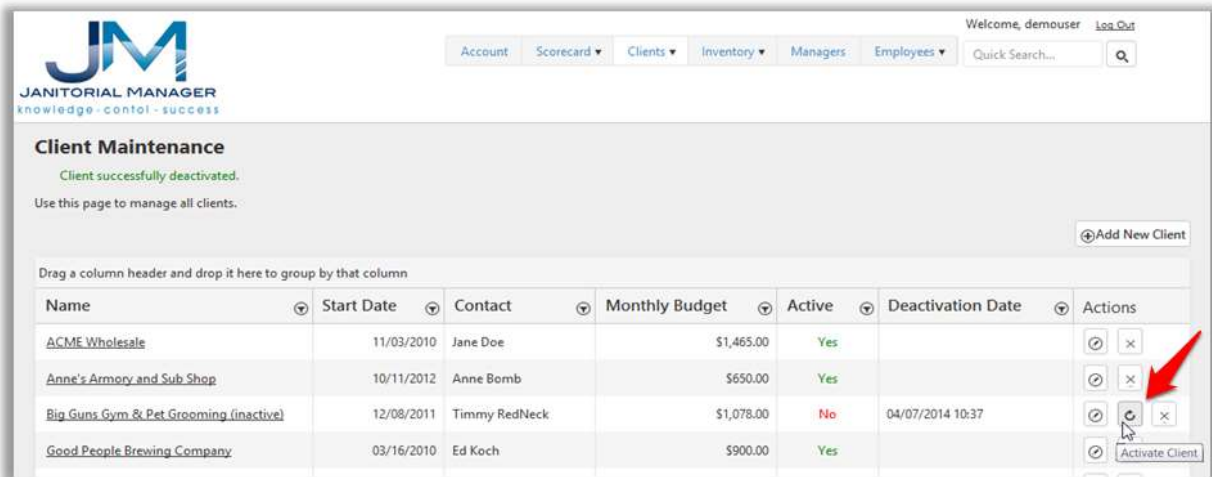


Figure 97

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

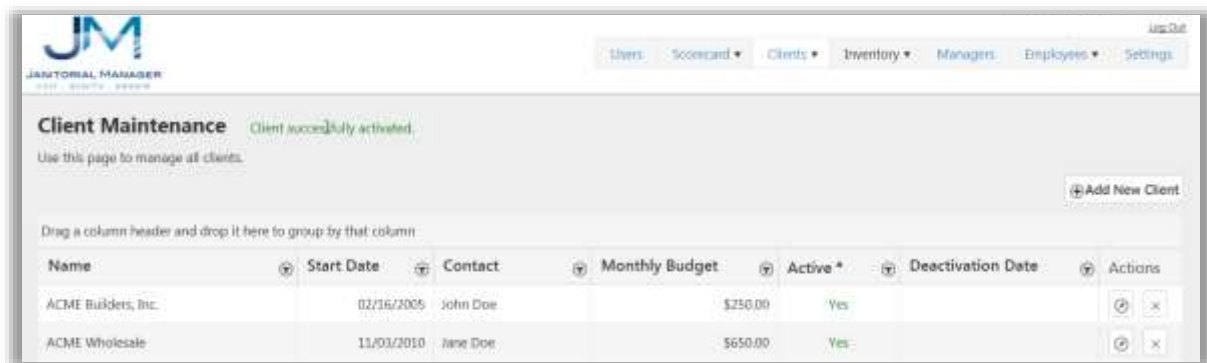


Figure 98

Deleting a client

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

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

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

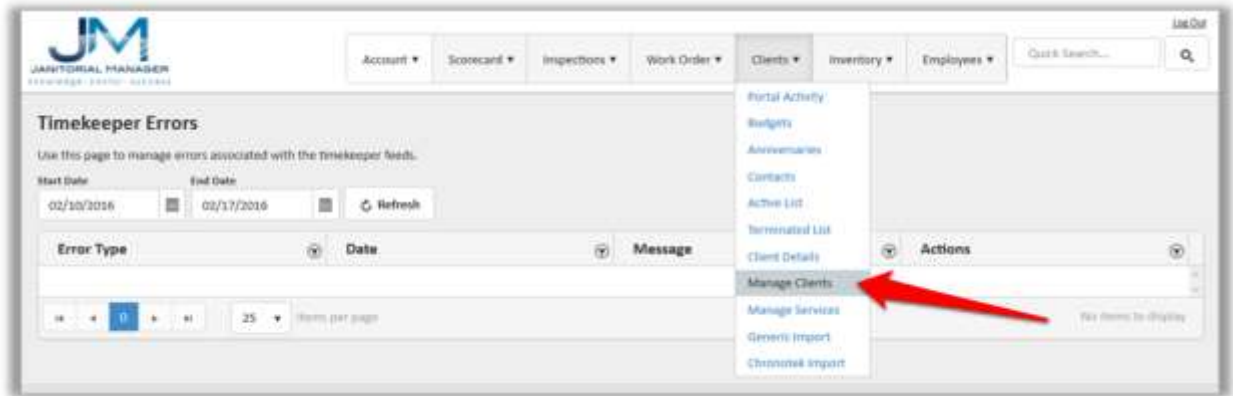


Figure 99

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

The screenshot shows the 'Client Maintenance' page in the Janitorial Manager software. It features a table with columns: Name, Start Date, Contact, Monthly Budget, Active, Deactivation Date, and Actions. The 'Active' column is sorted by 'No' (inactive) clients first. The table lists several clients, including ACME Wholesale (inactive), ACME Builders, Inc., Anne's Armory and Sub Shop, Big Guns Gym & Pet Grooming, and Good People Brewing Company. An 'Add New Client' button is located in the top right corner of the table area.

Name	Start Date	Contact	Monthly Budget	Active	Deactivation Date	Actions
ACME Wholesale (inactive)	11/03/2010	Jane Doe	\$650.00	No	01/21/2014 09:31	[Icons]
ACME Builders, Inc.	02/16/2005	John Doe	\$250.00	Yes		[Icons]
Anne's Armory and Sub Shop	10/11/2012	Anne Bomb	\$650.00	Yes		[Icons]
Big Guns Gym & Pet Grooming	12/08/2011	Timmy RedNeck	\$1,075.00	Yes		[Icons]
Good People Brewing Company	03/16/2010	Ed Koch	\$900.00	Yes		[Icons]

Figure 100

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

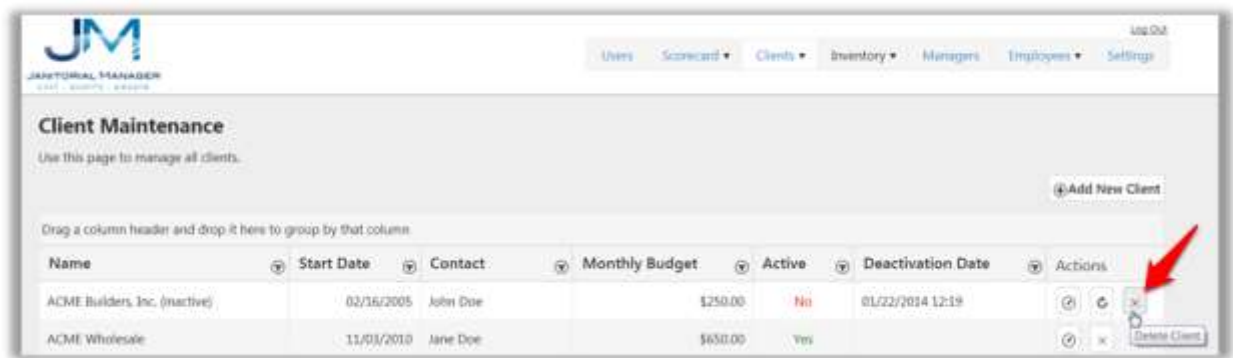


Figure 101

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

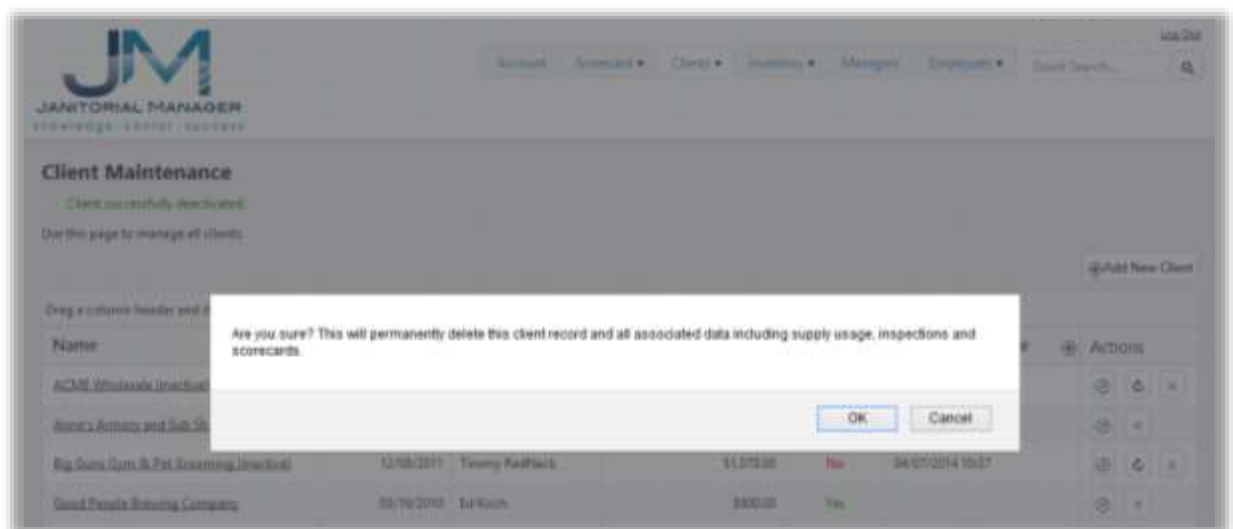


Figure 102

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

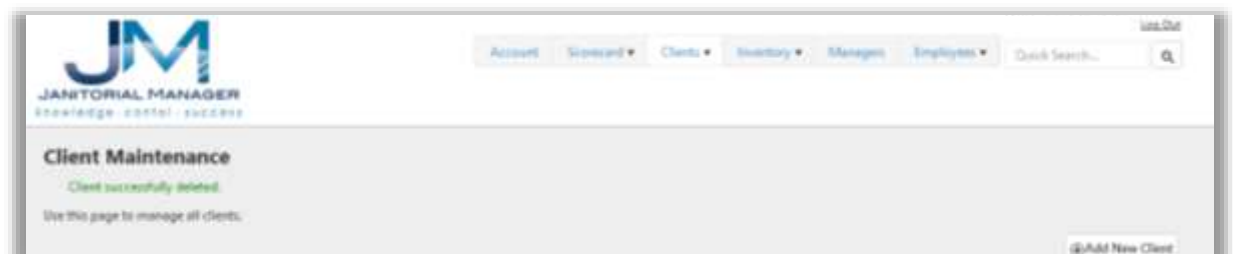


Figure 103

Manage Employees

Job Classifications

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

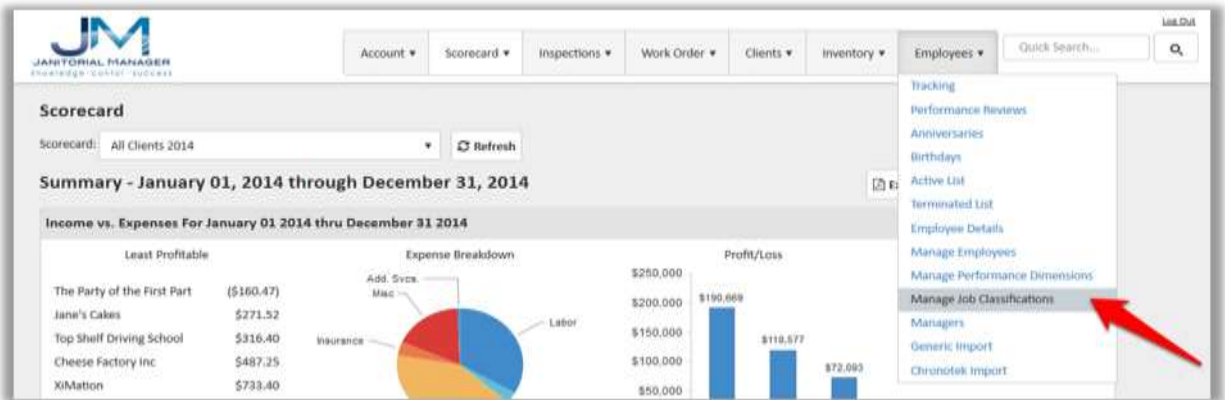


Figure 104

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

The screenshot shows the 'Job Classification Maintenance' page. It includes a 'Show All Job Classifications' checkbox and a 'New Job Classification' text input field, which is highlighted with a red arrow. Below the input field is a 'Save' button. The page also features a table with columns for Name, Employees, Active, and Actions. The table contains two rows: 'Floor Scrubber' and 'General Cleaning'.

Figure 105

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

The screenshot shows the 'Job Classification Maintenance' page. The 'New Job Classification' text input field now contains the text 'Floor Tech'. The 'Save' button is highlighted with a red arrow. The table below remains the same as in Figure 105.

Figure 106

Delete Job Classification

If necessary job classifications can be removed or deleted.

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



Figure 107

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

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

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

The screenshot shows the 'Job Classification Maintenance' page. It includes a 'Show All Job Classifications' checkbox and a 'New Job Classification' input field. Below is a table with columns: Name, Employees, Active, and Actions. The first row shows 'Floor Scrubber' with 9 employees and is active. A red arrow points to the 'X' icon in the Actions column, which is used to delete the job classification.

Name	Employees	Active	Actions
Floor Scrubber	9	Yes	

Figure 108

Edit Job Classification

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

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

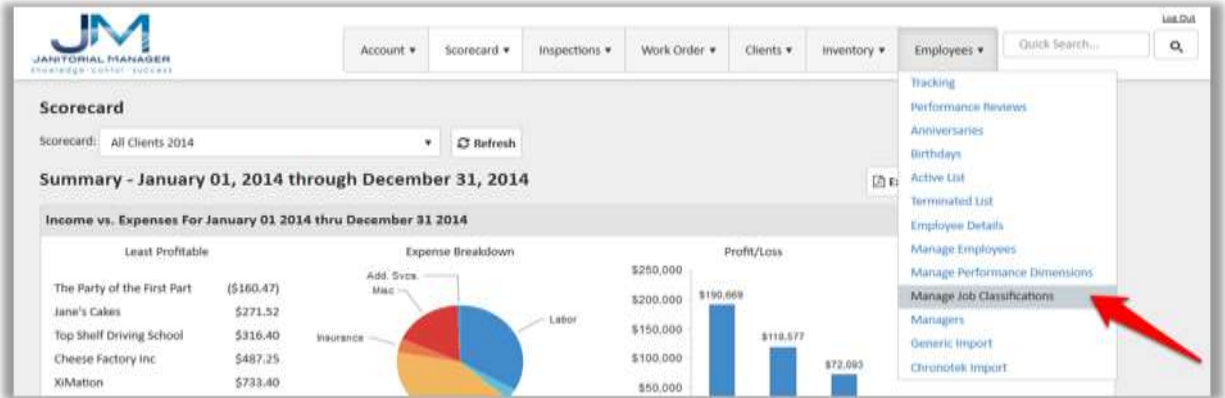


Figure 109

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

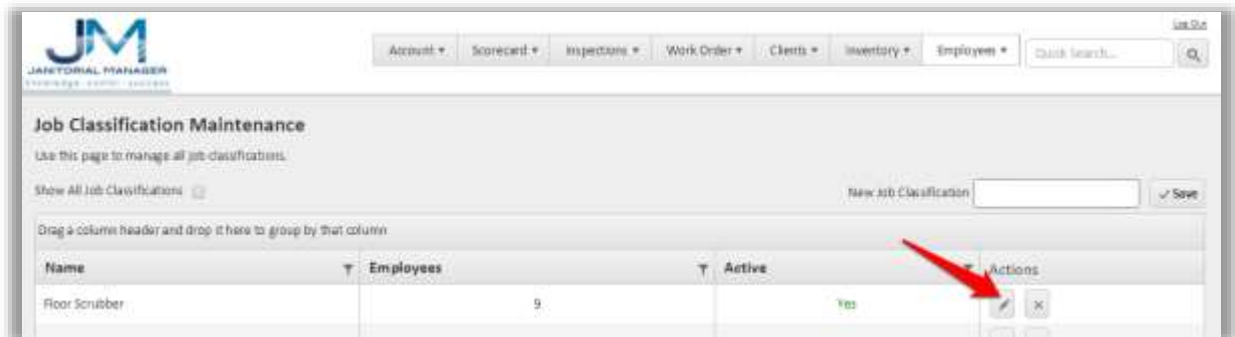


Figure 110

Adding New Employee

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

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

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

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

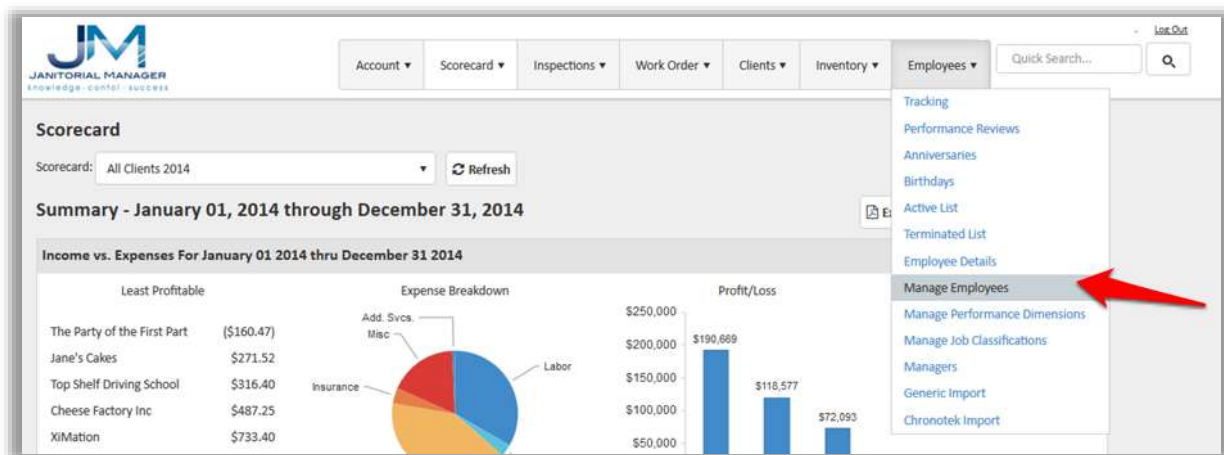


Figure 111

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

The screenshot shows the 'Employee Maintenance' page in the JM application. It includes a header with the JM logo and navigation tabs. Below the header, there is a section for 'Employee Maintenance' with a sub-header 'Use this page to manage all employees.' and an 'Add New Employee' button. A table lists employees with columns for Name, Emp. Status, Job, # Clients, Active, Deactivation Date, External Code, and Actions. The table contains two rows of data.

Name	Emp. Status	Job	# Clients	Active	Deactivation Date	External Code	Actions
Bono, Sonny	FullTime	Area Manager	2	Yes		JanMgr-3131	
Coktostin, John	PartTime	Floor Scrubber	8	Yes		JanMgr-866	

Figure 112

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

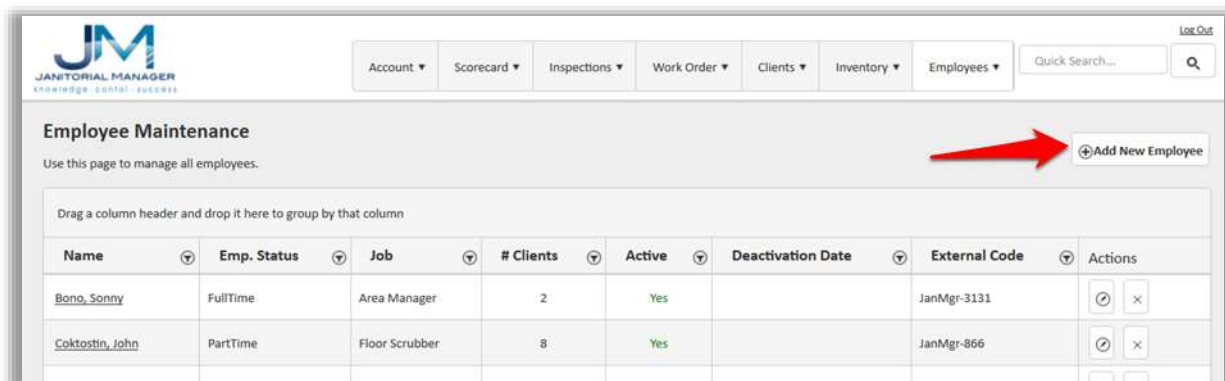


Figure 113

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

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

Figure 114

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

Import Employees

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

Download the Employee Import Instruction Spreadsheet

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

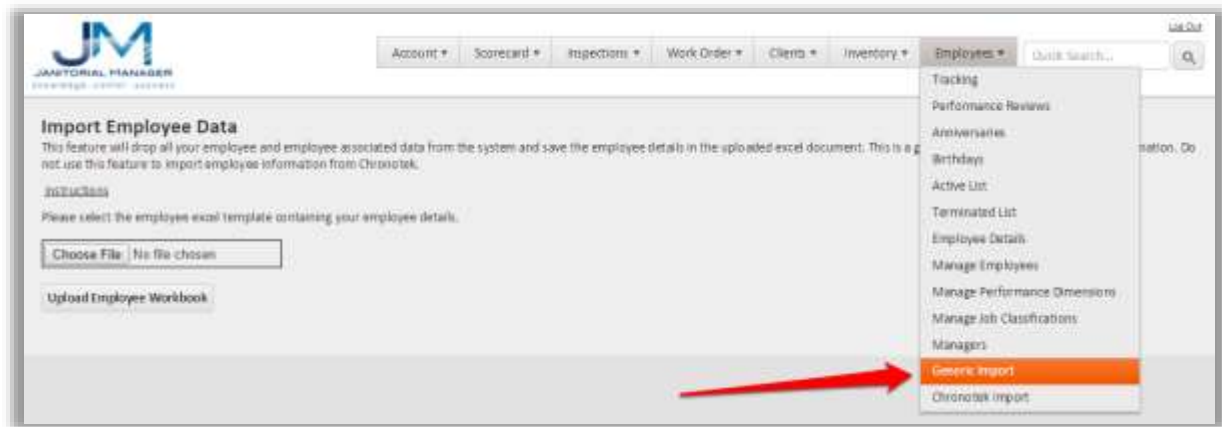


Figure 115

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



Figure 116

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

Populate Employee Data in Import Spreadsheet

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

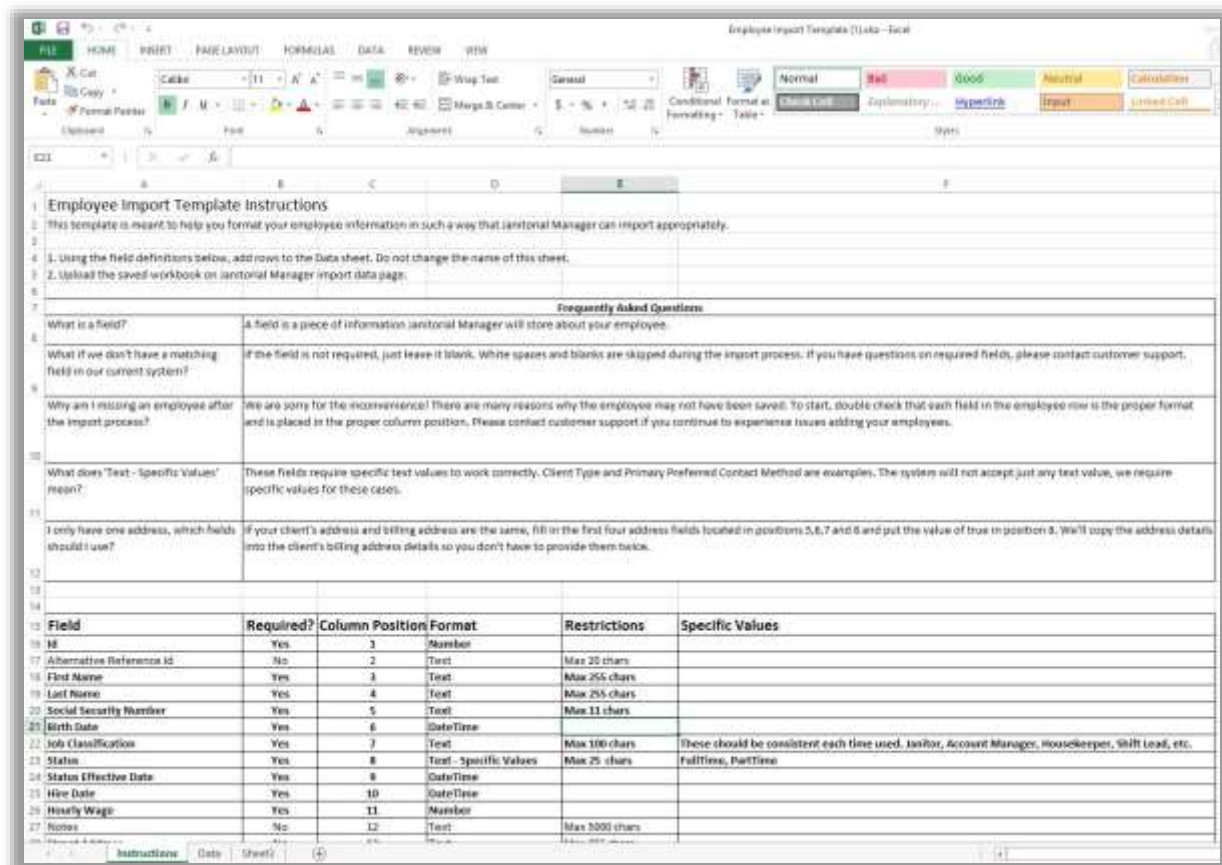


Figure 117

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

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

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

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

Figure 118

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

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

Upload the Employee Spreadsheet

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

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

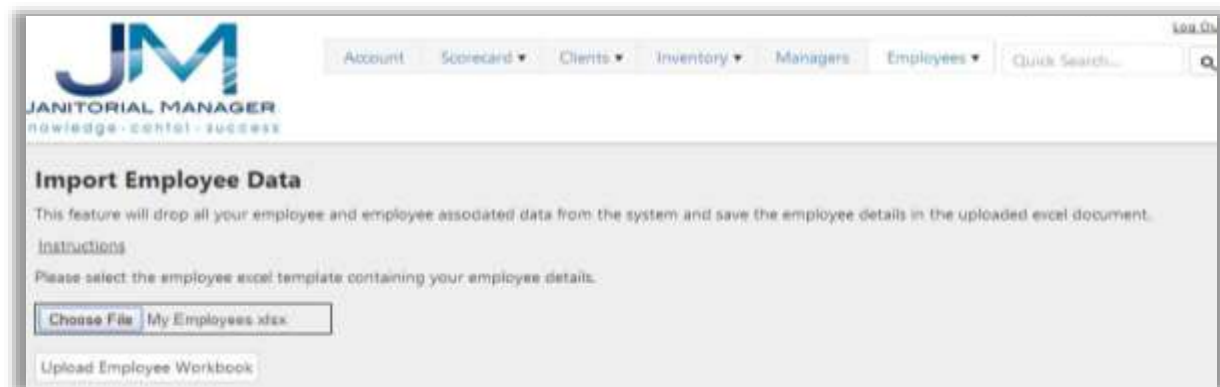


Figure 119

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

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

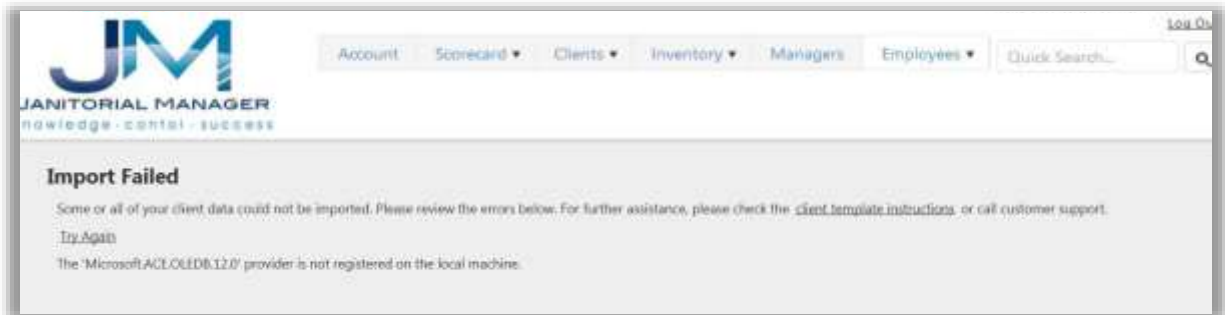


Figure 120

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



Figure 121

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

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

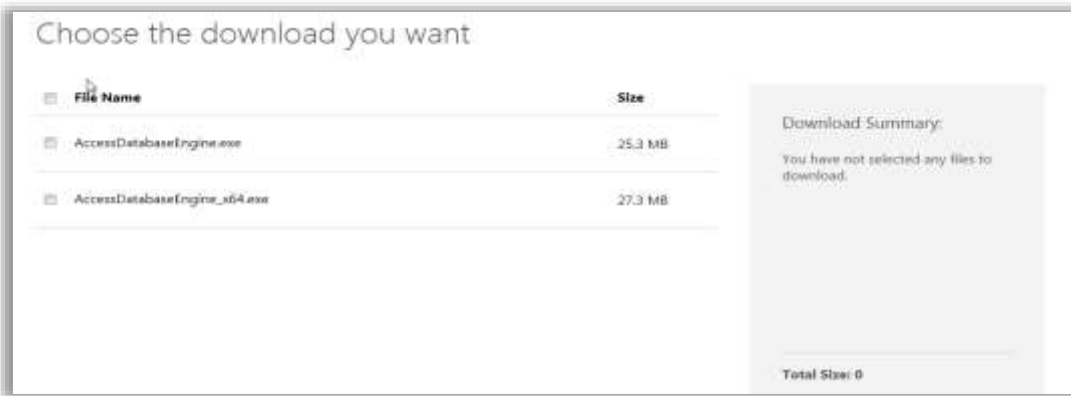


Figure 123

Select the Run command to install this on your computer.

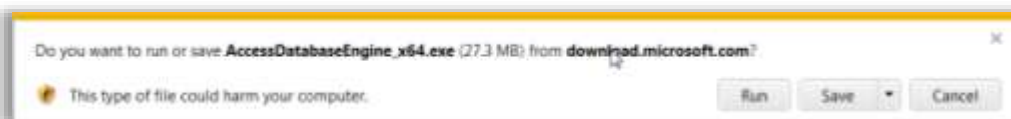


Figure 122

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

To begin the installation:

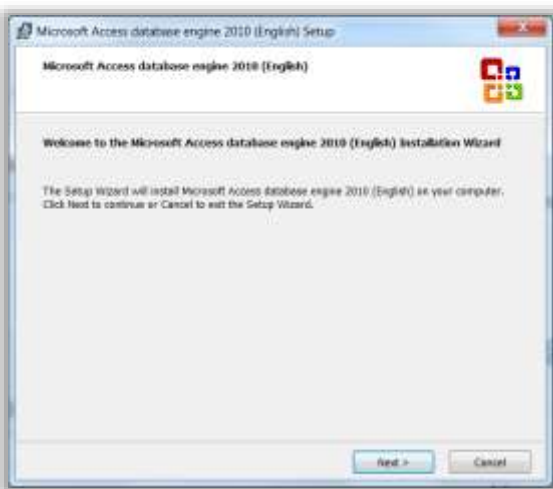


Figure 124

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

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

Edit Employee

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

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

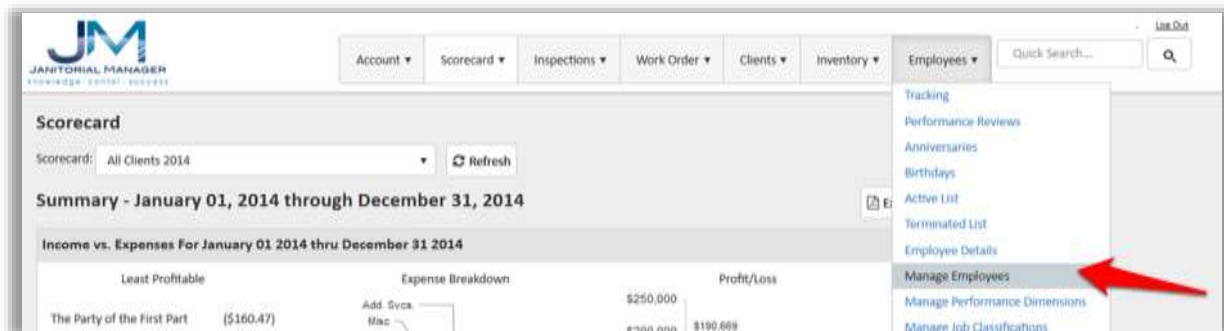


Figure 125

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

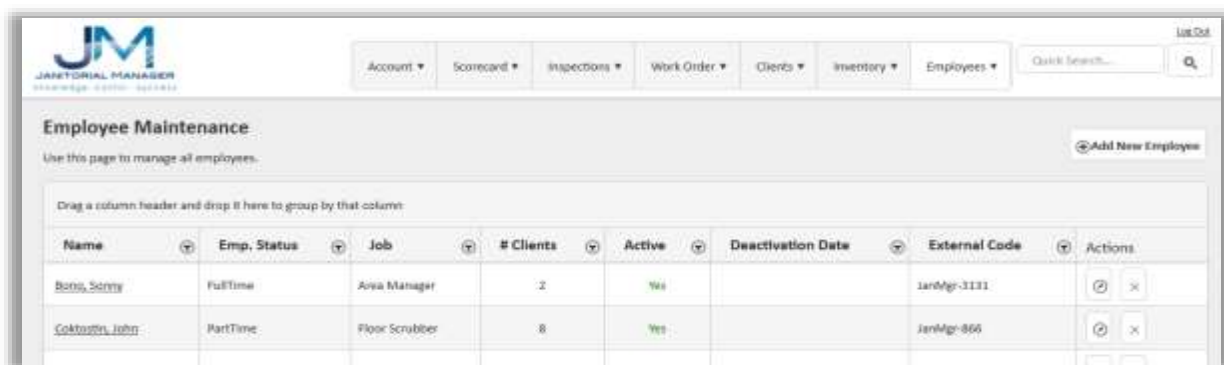


Figure 126

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

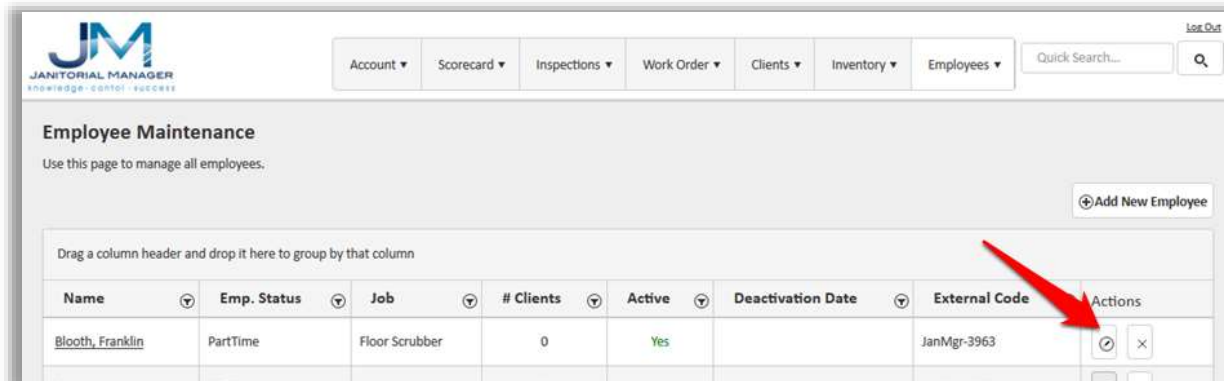


Figure 127

Search for employee

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

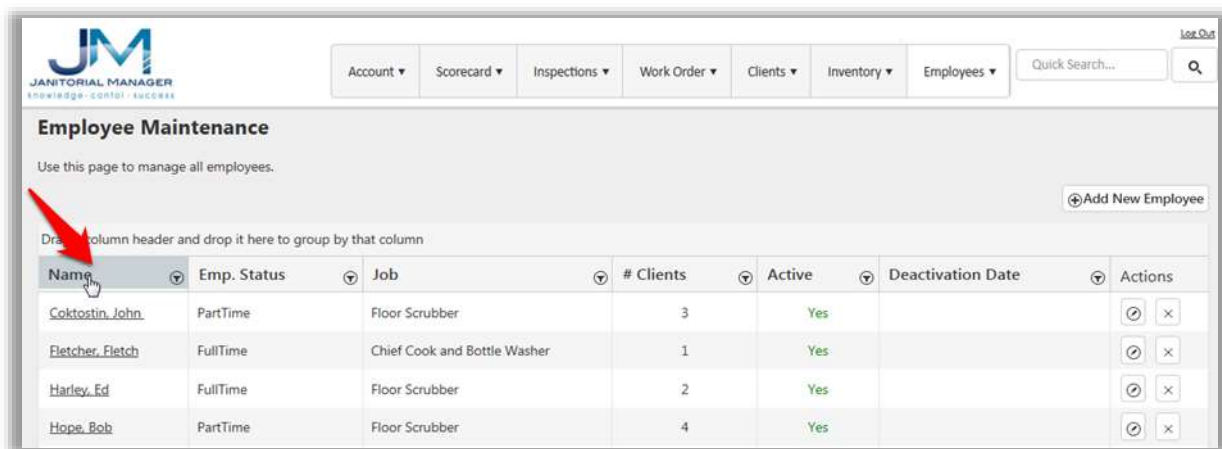


Figure 128

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

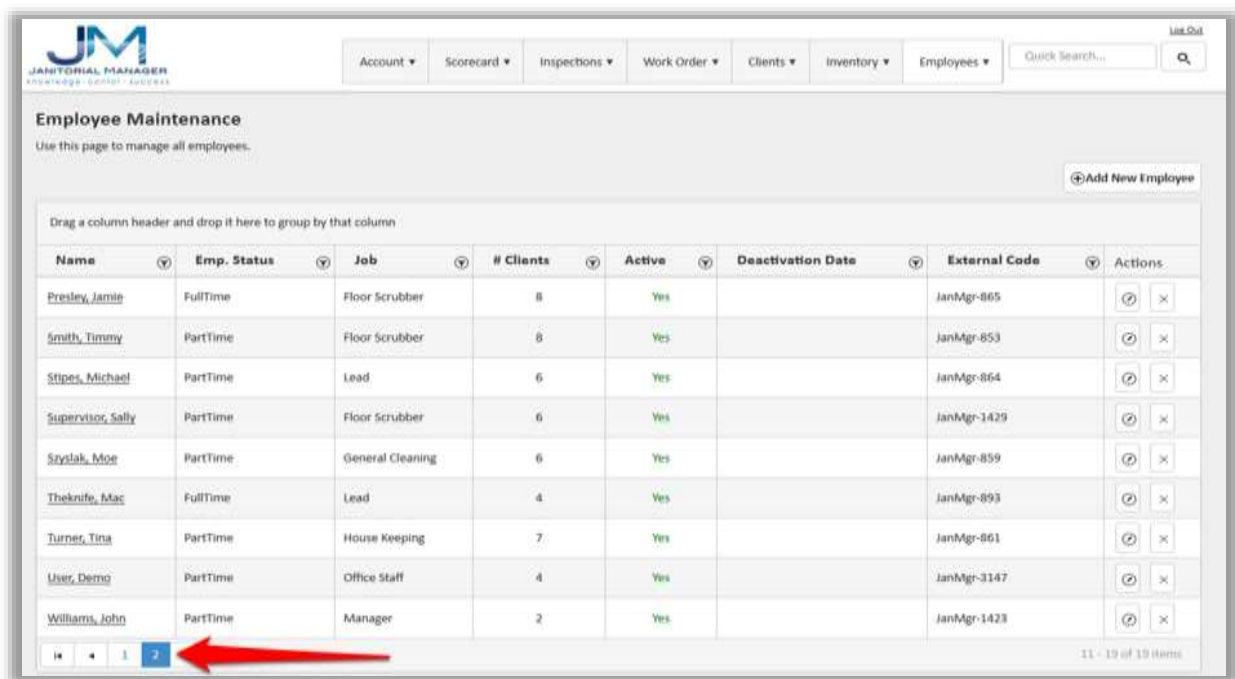
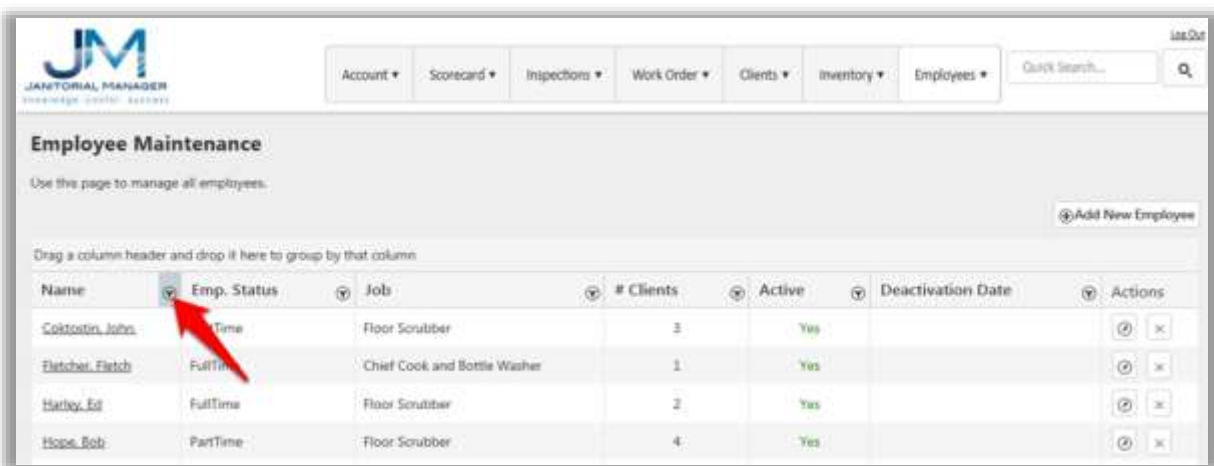


Figure 129

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

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

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



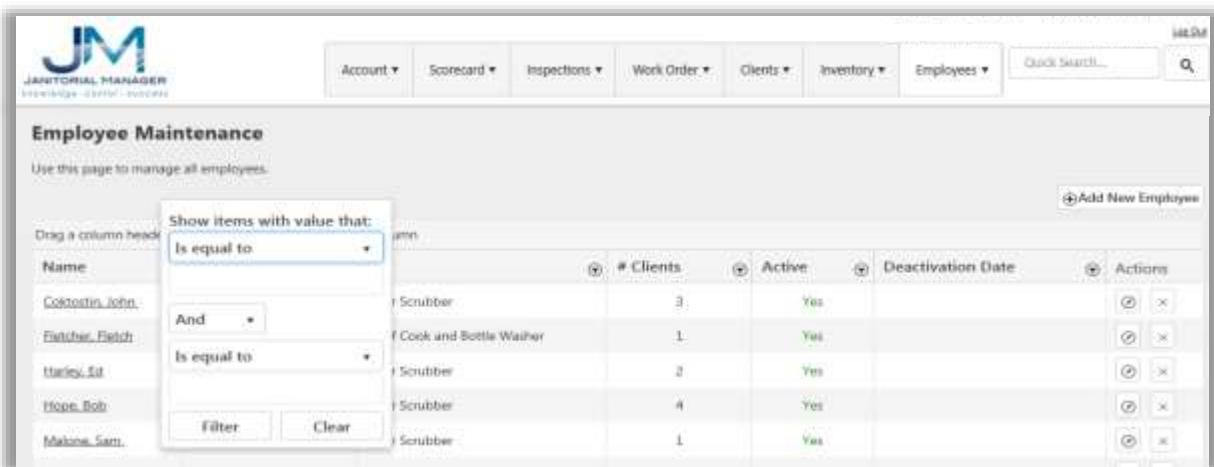
Employee Maintenance
Use this page to manage all employees.

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

Name	Emp. Status	Job	# Clients	Active	Deactivation Date	Actions
Cokstotin, John	PartTime	Floor Scrubber	3	Yes		
Fletcher, Fletcher	FullTime	Chief Cook and Bottle Washer	1	Yes		
Harley, Ed	FullTime	Floor Scrubber	2	Yes		
Hope, Bob	PartTime	Floor Scrubber	4	Yes		

Figure 130

The following form will be displayed.



Employee Maintenance
Use this page to manage all employees.

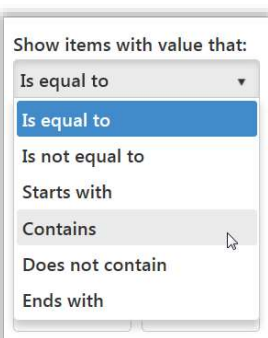
Drag a column header and drop it here to group by that column

Show items with value that:
Is equal to
And
Is equal to
Filter Clear

Name	Emp. Status	Job	# Clients	Active	Deactivation Date	Actions
Cokstotin, John	PartTime	Floor Scrubber	3	Yes		
Fletcher, Fletcher	FullTime	Chief Cook and Bottle Washer	1	Yes		
Harley, Ed	FullTime	Floor Scrubber	2	Yes		
Hope, Bob	PartTime	Floor Scrubber	4	Yes		
Malone, Sam	PartTime	Floor Scrubber	1	Yes		

Figure 131

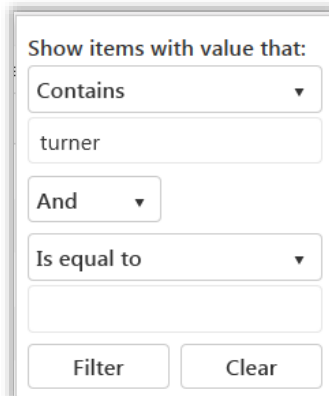
In the **Show items with value that:** dropdown list select “Contains”



Show items with value that:
Is equal to
Is equal to
Is not equal to
Starts with
Contains
Does not contain
Ends with

Figure 132

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

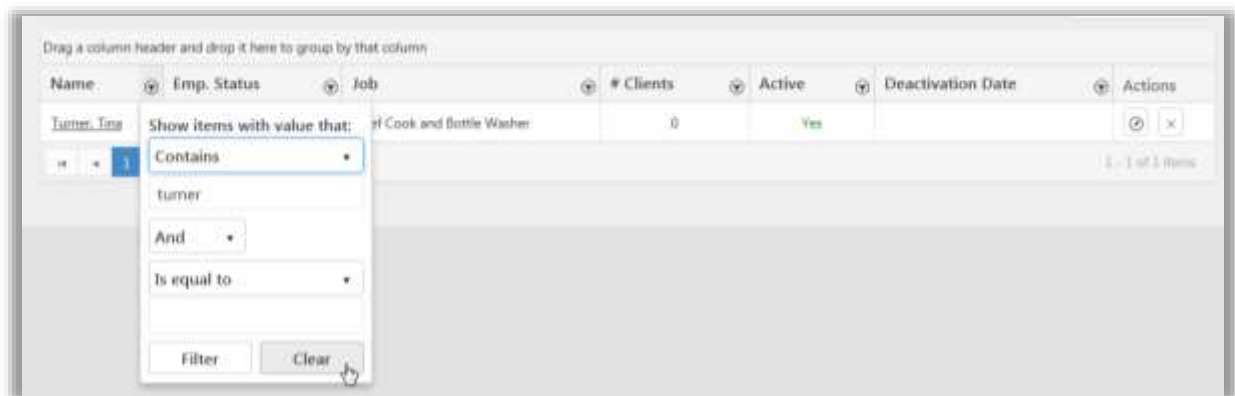


A filter dialog box with the following elements:

- Text: "Show items with value that:"
- Dropdown menu: "Contains" (with a downward arrow)
- Text input field: "turner"
- Dropdown menu: "And" (with a downward arrow)
- Dropdown menu: "Is equal to" (with a downward arrow)
- Empty text input field
- Buttons: "Filter" and "Clear"

Figure 133

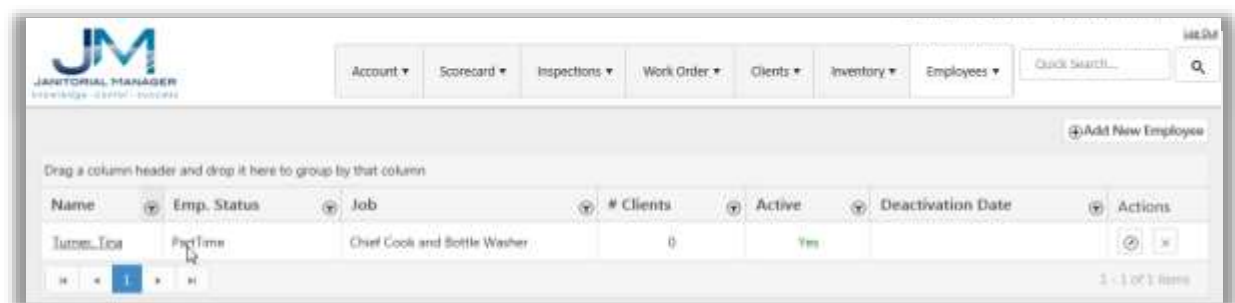
Notice all the entries that are shown are only the ones where “Turner” are contained in the name. The other entries have been temporarily filtered out.



A screenshot of the employee list interface. A filter dialog box is overlaid on the table. The table has columns: Name, Emp. Status, Job, # Clients, Active, Deactivation Date, and Actions. The first row is highlighted: Turner, Temp, Chef Cook and Bottle Washer, 0, Yes, and a row action icon. The filter dialog box is the same as in Figure 133, but the "Filter" button is disabled and the "Clear" button is active. The text "1 of 3 items" is visible in the bottom right of the table area.

Figure 134

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



A screenshot of the employee list interface with the filter cleared. The table shows the same columns as in Figure 134. The first row is highlighted: Turner, Temp, Chef Cook and Bottle Washer, 0, Yes, and a row action icon. The "Add New Employee" button is visible in the top right. The text "1 of 3 items" is visible in the bottom right of the table area.

Figure 135

Deactivate an Employee

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

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

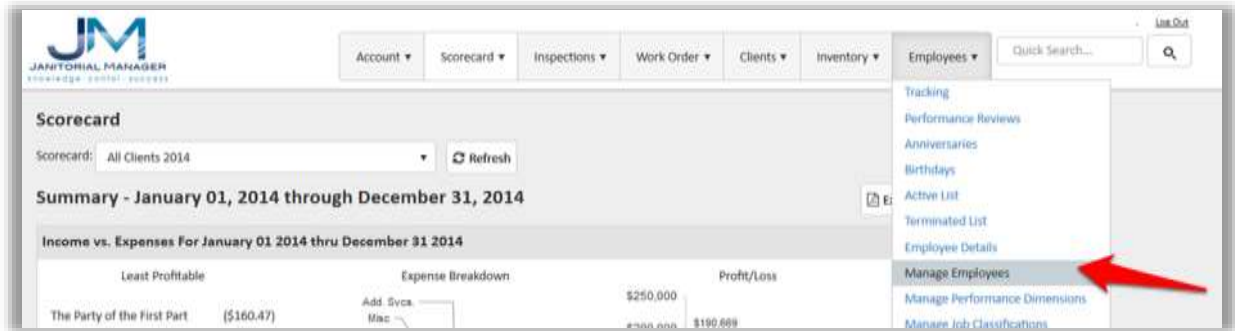


Figure 136

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

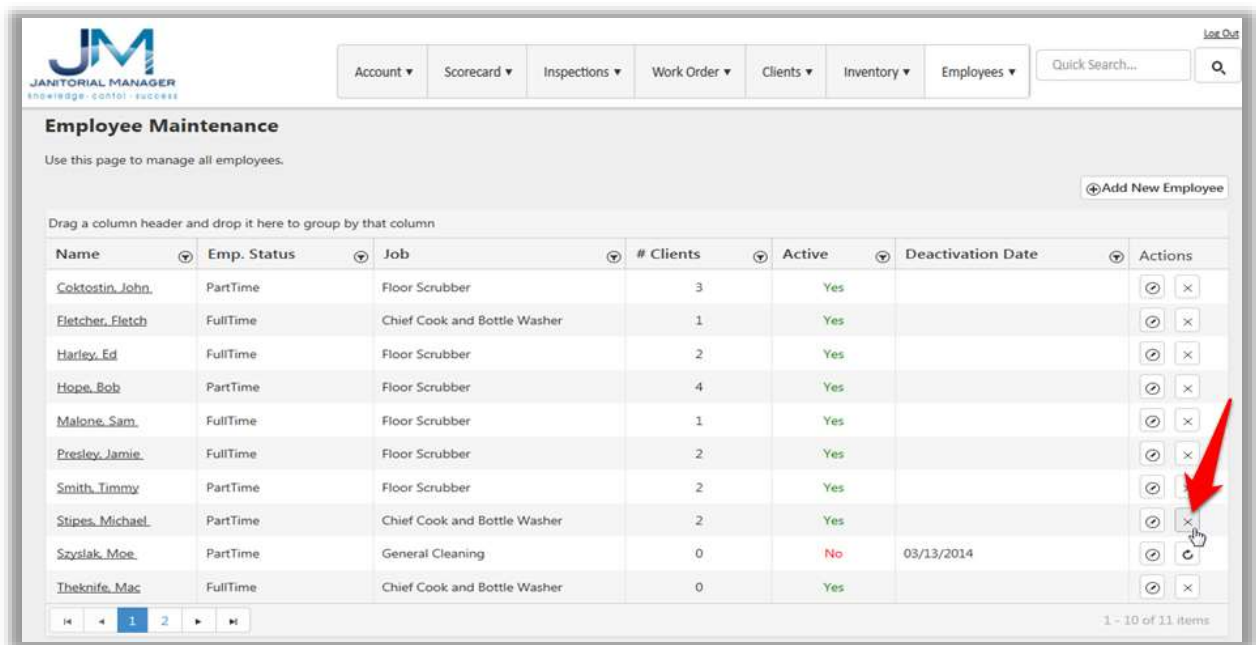
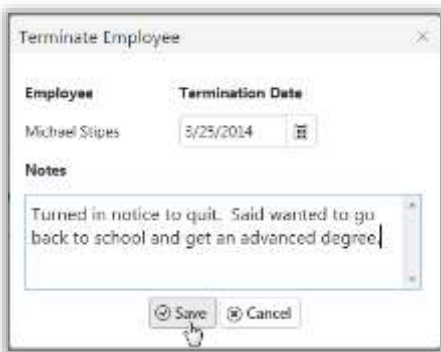


Figure 137

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



Terminate Employee

Employee: Michael Stipes

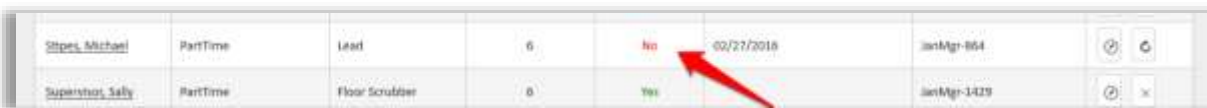
Termination Date: 5/25/2014

Notes: Turned in notice to quit. Said wanted to go back to school and get an advanced degree.

Save Cancel

Figure 138

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



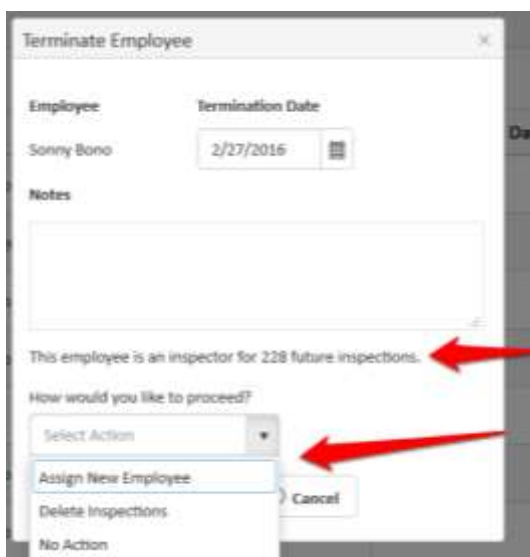
Stipes, Michael	PartTime	Lead	6	No	02/27/2015	JanMgt-864	?	ⓧ
Supershot, Sally	PartTime	Floor Scrubber	8	Yes		JanMgt-1429	?	ⓧ

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.



Terminate Employee

Employee: Sonny Bono

Termination Date: 2/27/2016

Notes:

This employee is an inspector for 228 future inspections.

How would you like to proceed?

Select Action

- Assign New Employee
- Delete Inspections
- No Action

Cancel

Figure 140

Re-activate an Employee

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

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

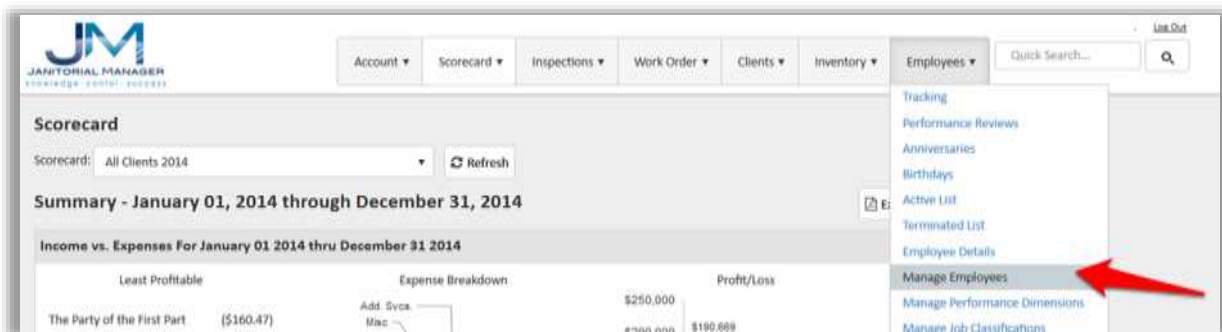


Figure 141

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

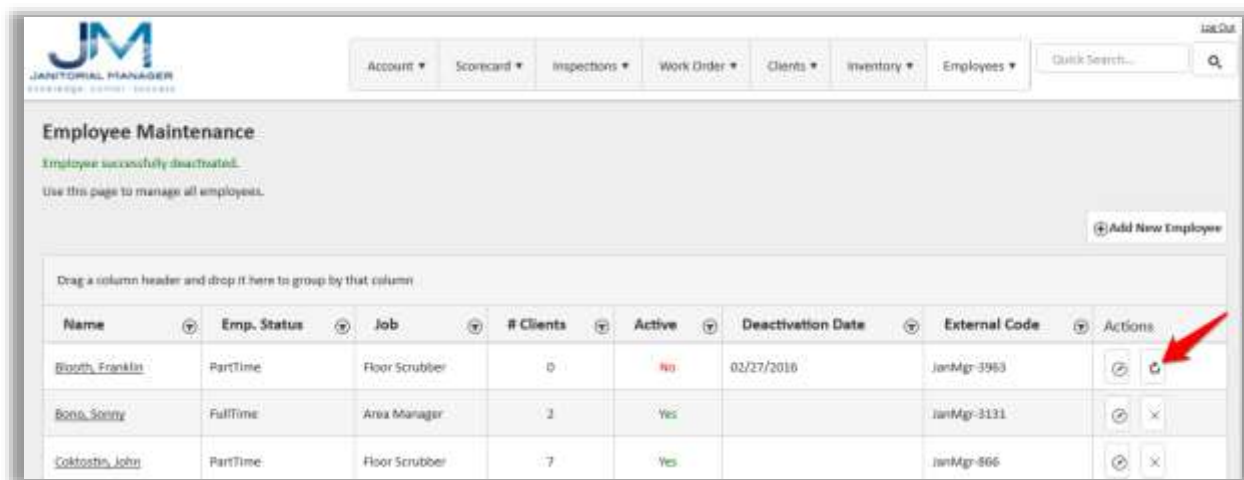


Figure 142

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



Figure 143

Employee Tracking

JM provides powerful employee performance tracking tools.

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

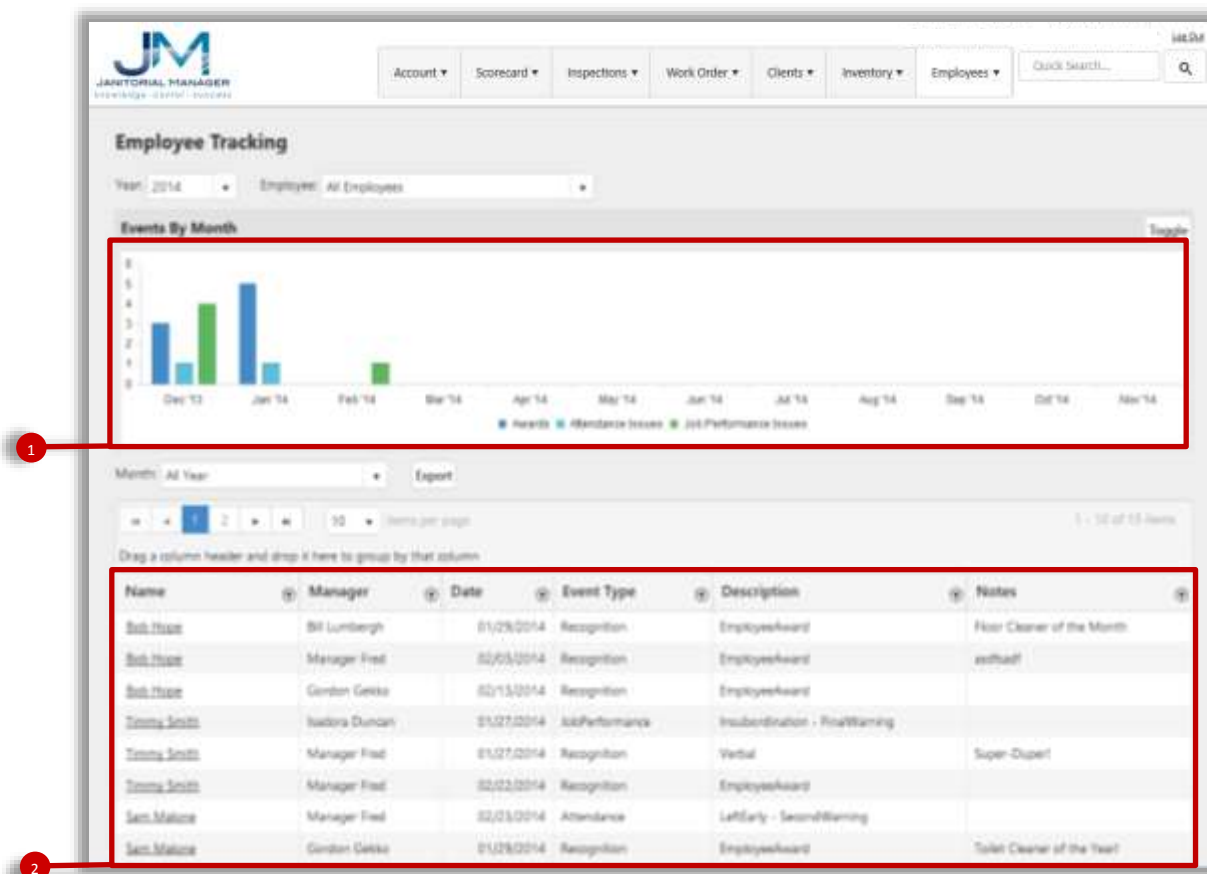


Figure 144

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

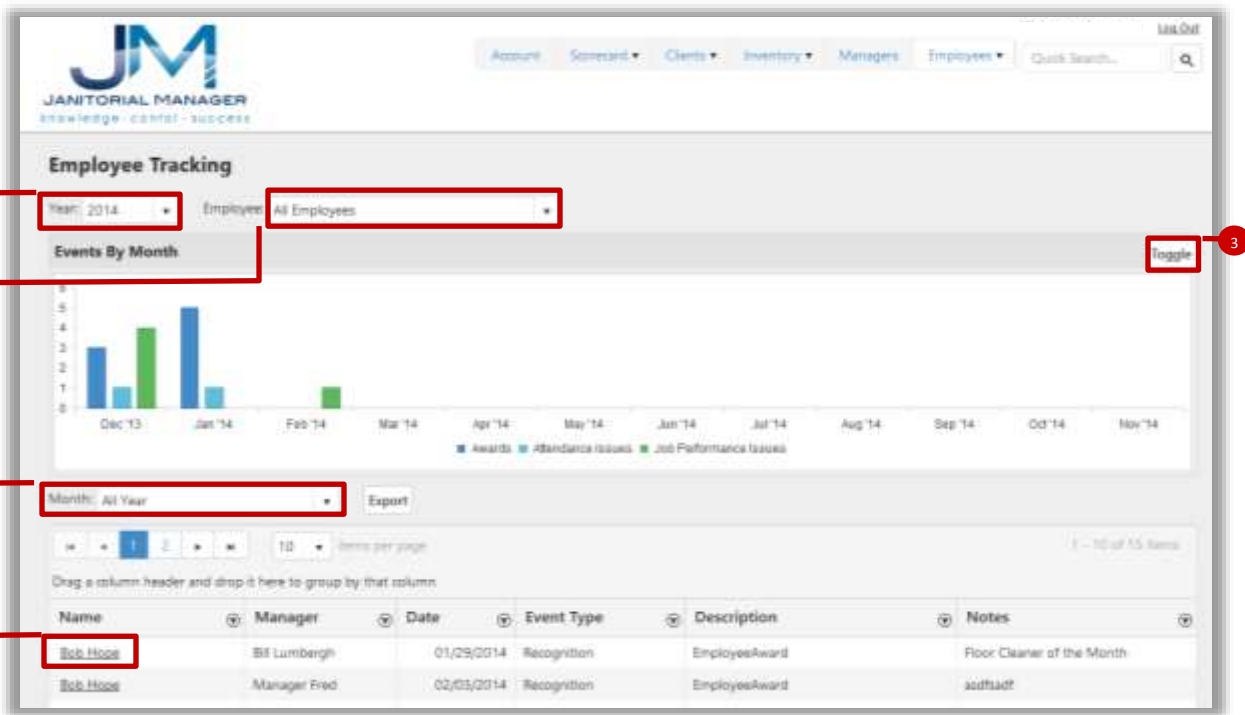


Figure 145

On the **Employee Tracking** page:

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

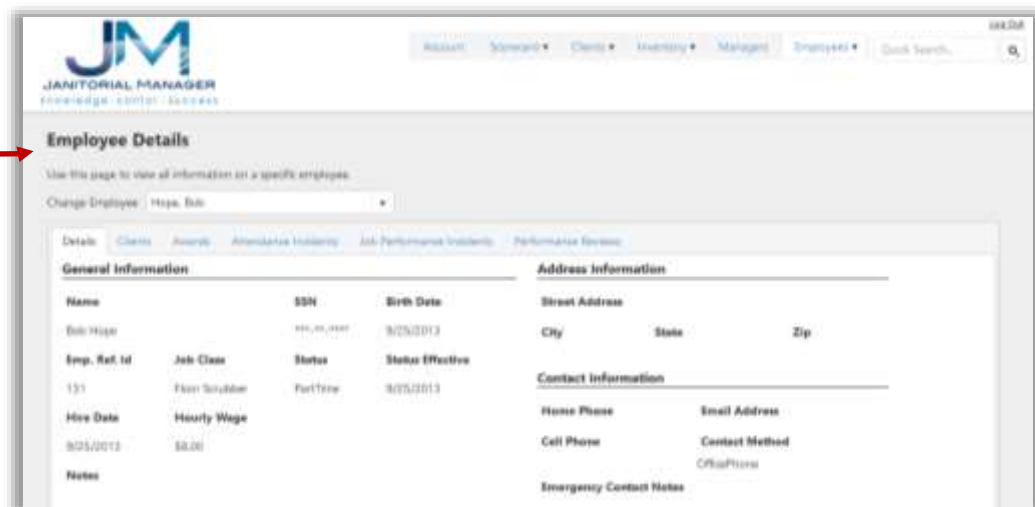
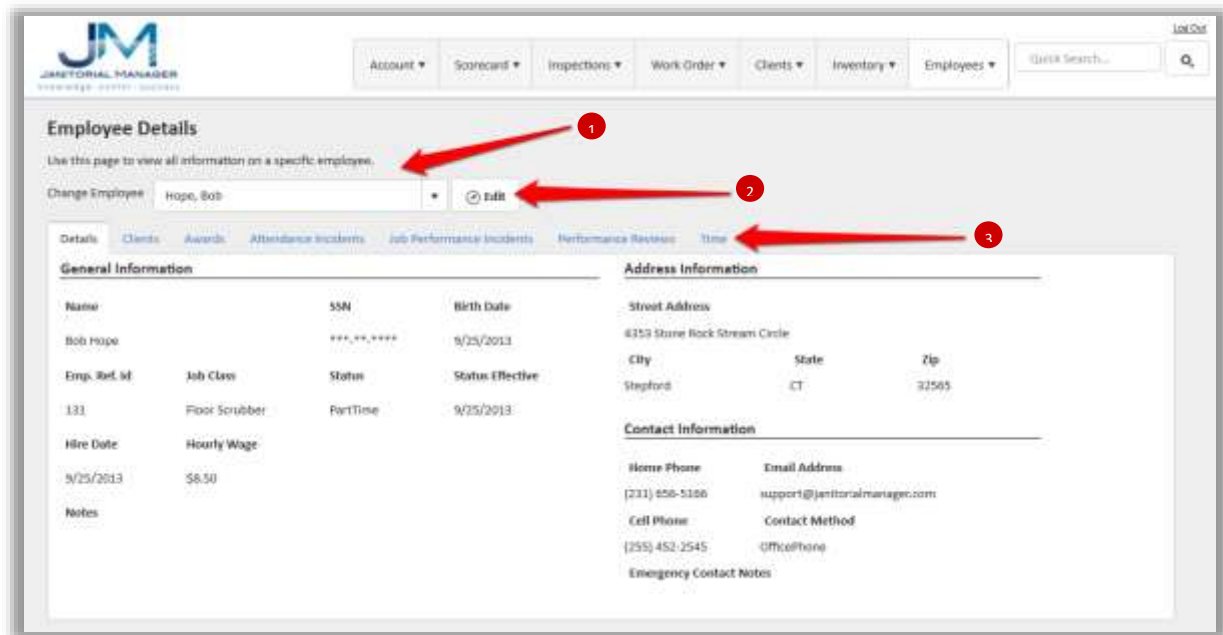


Figure 146

Employee Details

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



Employee Details

Use this page to view all information on a specific employee.

Change Employee: Hope, Bob * [Edit](#)

Details Clients Awards Attendance Incidents Job Performance Incidents Performance Reviews Time

General Information				Address Information		
Name	SSN	Birth Date		Street Address		
Bob Hope	***-**-****	9/25/2013		4353 Stone Rock Stream Circle		
Emp. Ref. Id.	Job Class	Status	Status Effective	City	State	Zip
131	Floor Scrubber	PartTime	9/25/2013	Stepford	CT	32565
Hire Date	Hourly Wage					
9/25/2013	\$8.50					
Notes						
				Contact Information		
				Home Phone	Email Address	
				(211) 456-5106	support1@janitorialmanager.com	
				Cell Phone	Contact Method	
				(255) 452-2545	OfficePhone	
				Emergency Contact Notes		

Figure 147

1. Use the *Change Employee* drop down box to select a 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*, *Attendance Incidents*, *Job Performance Incidents* and *Performance Reviews*. The *Time* tab is used to review hours clocked by the selected employee and is only available to Chronotek users.

Employee Details – Client Account Assignment and Training

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

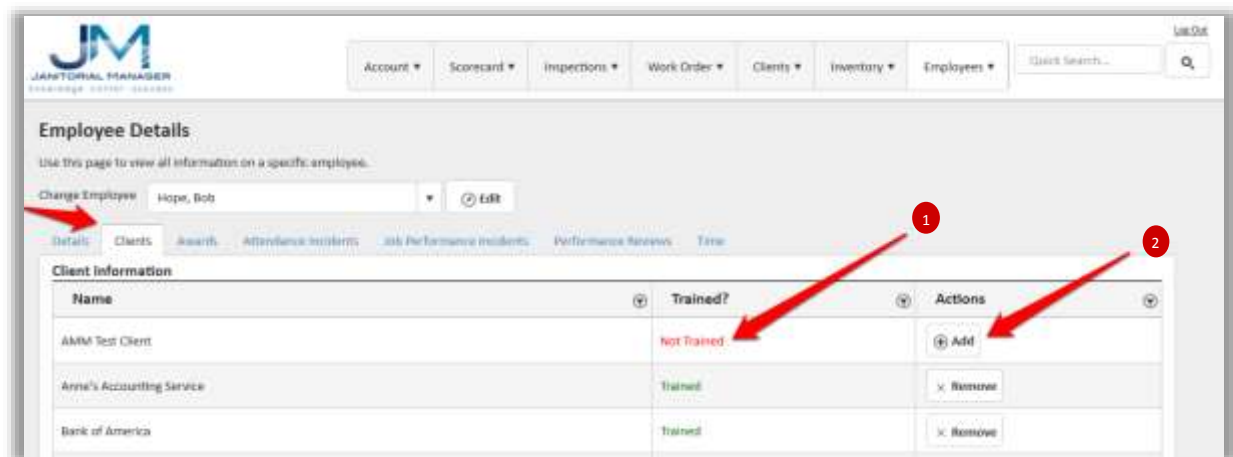


Figure 148

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

Employee Awards and Recognition

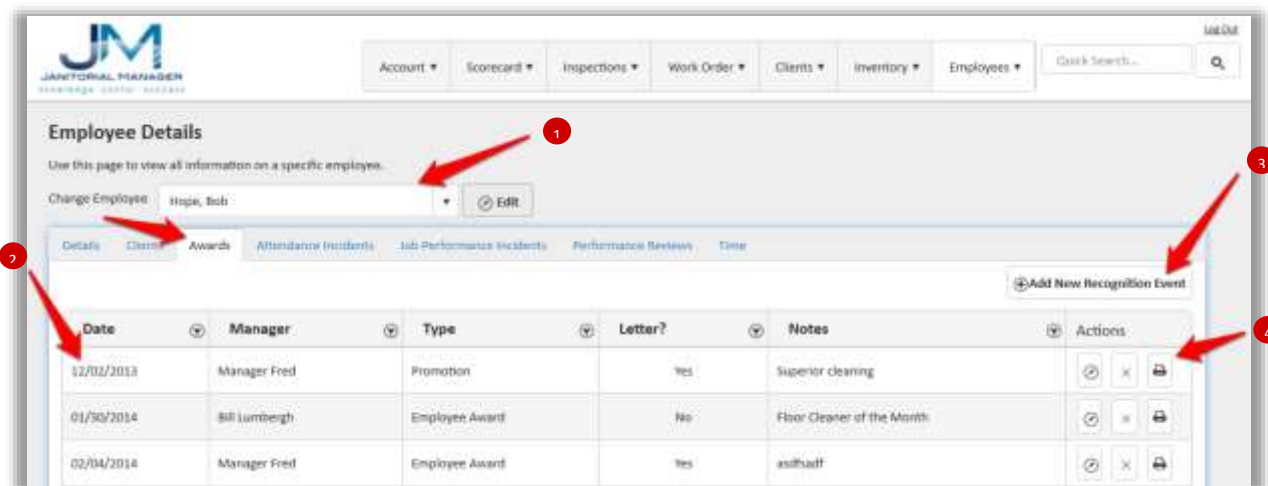


Figure 149

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

Adding a New Employee Recognition Event

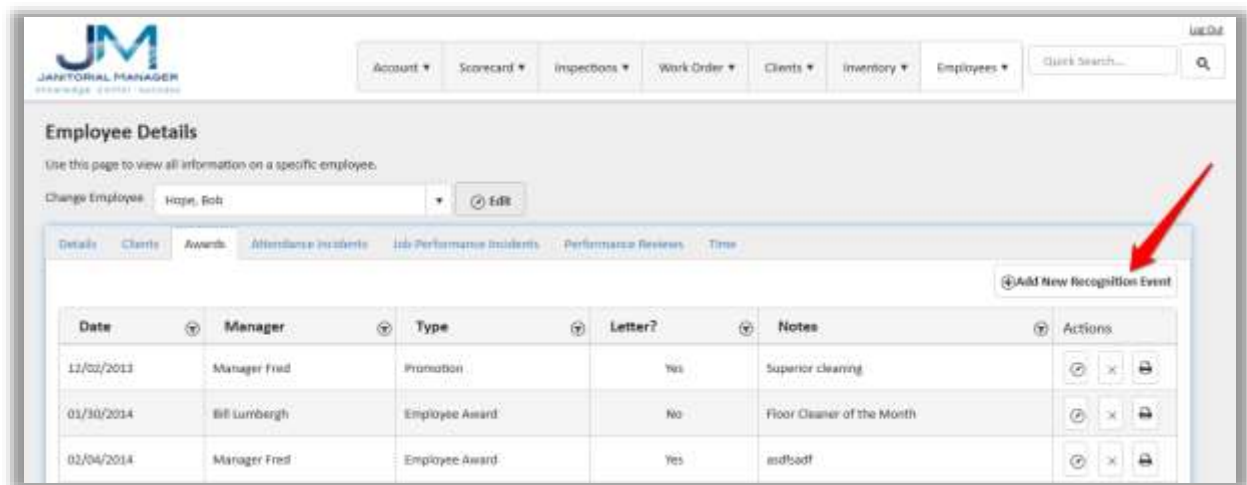


Figure 150

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

The 'Add Recognition Event' dialog box contains the following fields and controls:

- Employee:** Bob Hope
- Manager:** Choose Manager (dropdown menu, labeled 1)
- Event Date:** 2/23/2016 (calendar icon, labeled 4)
- Letter Issued?:** ☐
- Type:** Choose Type (dropdown menu, labeled 2)
- Notes:** Text area (labeled 3)
- Buttons:** Save (labeled 5) and Cancel

Figure 151

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

Employee Attendance Incidents

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

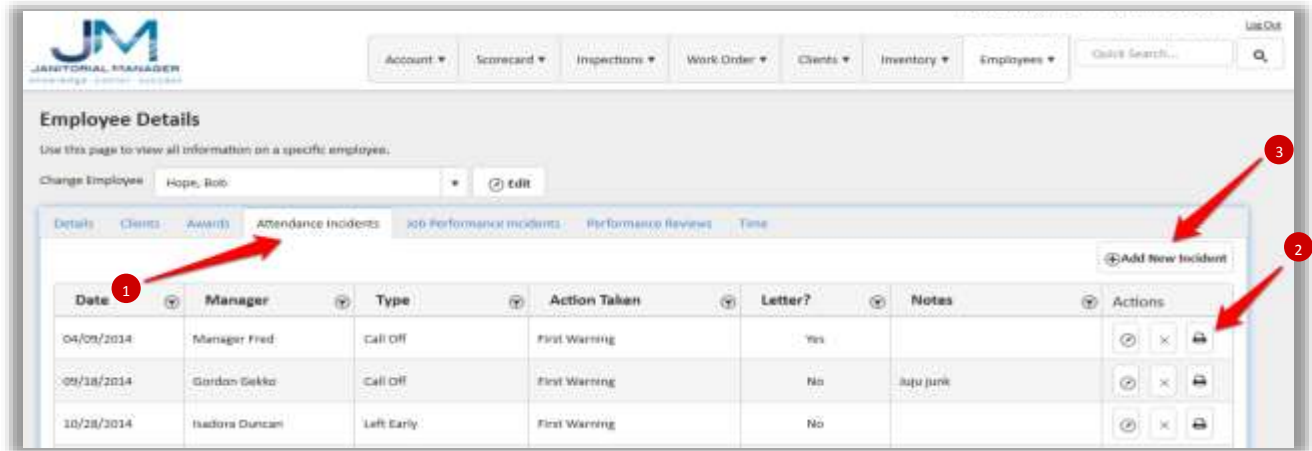


Figure 152

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

Add Attendance Incident

Add Attendance Incident

Employee: Bob Hope

Manager: Choose Manager

Incident Date: 2/28/2016

Letter Issued? ☐

Incident Type: Choose Incident Type

Action Taken: Choose Action

Notes: [Text Area]

Save Cancel

Figure 153

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

Employee Job Performance Incidents

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

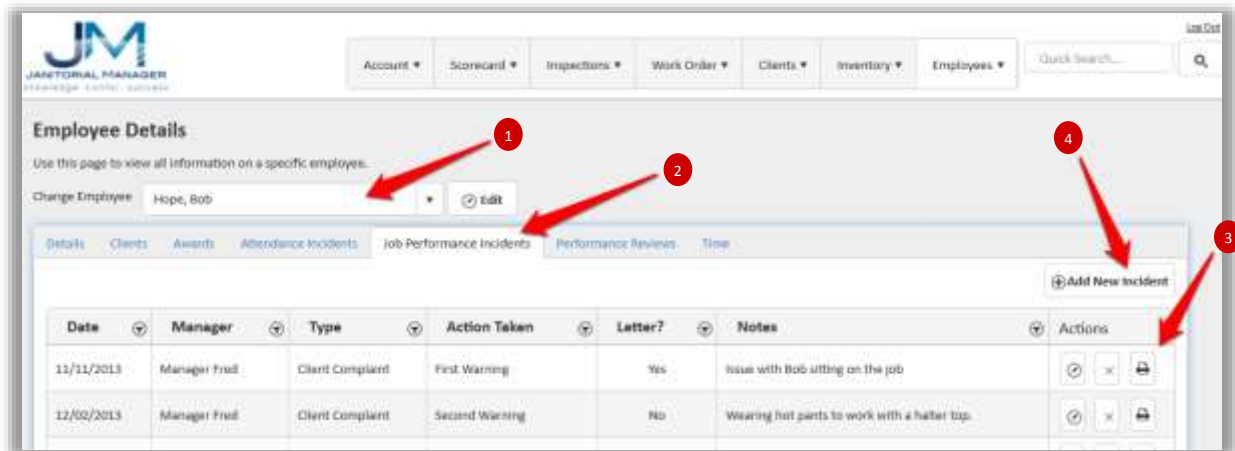


Figure 154

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

Add Job Performance Incident

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

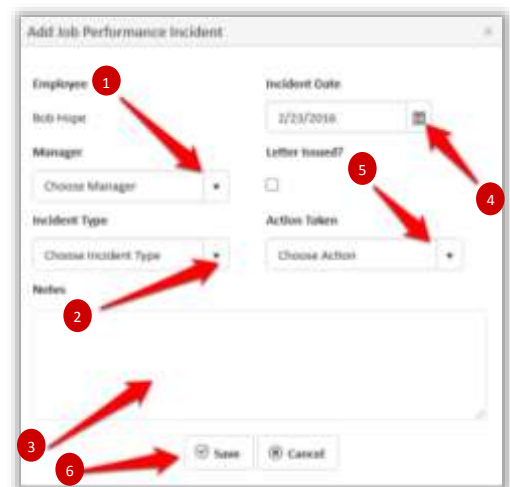


Figure 155

Employee Performance Reviews

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

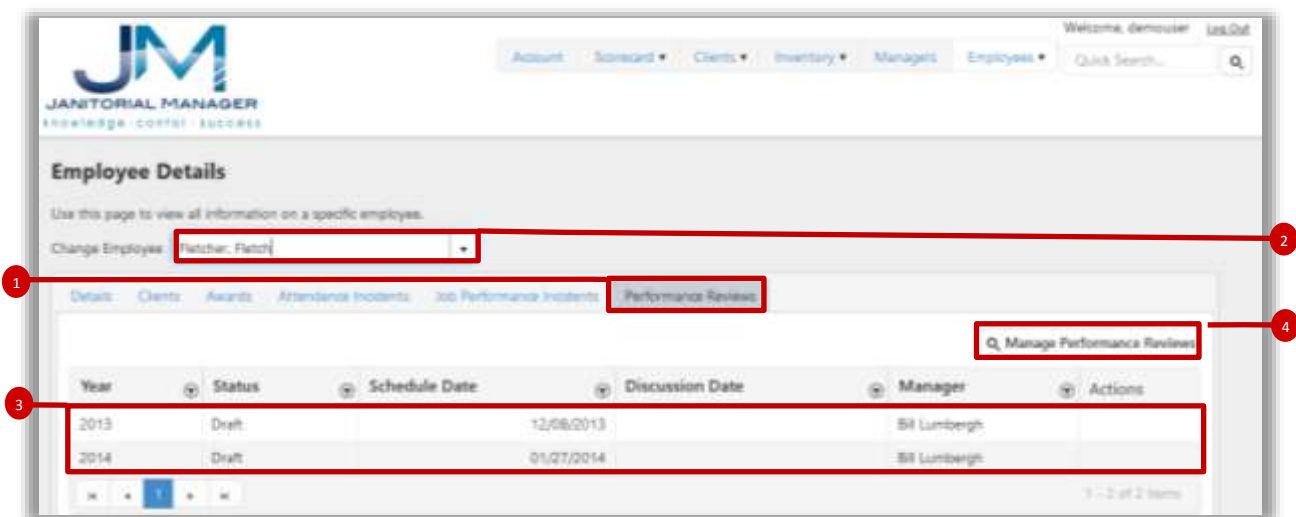


Figure 156

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

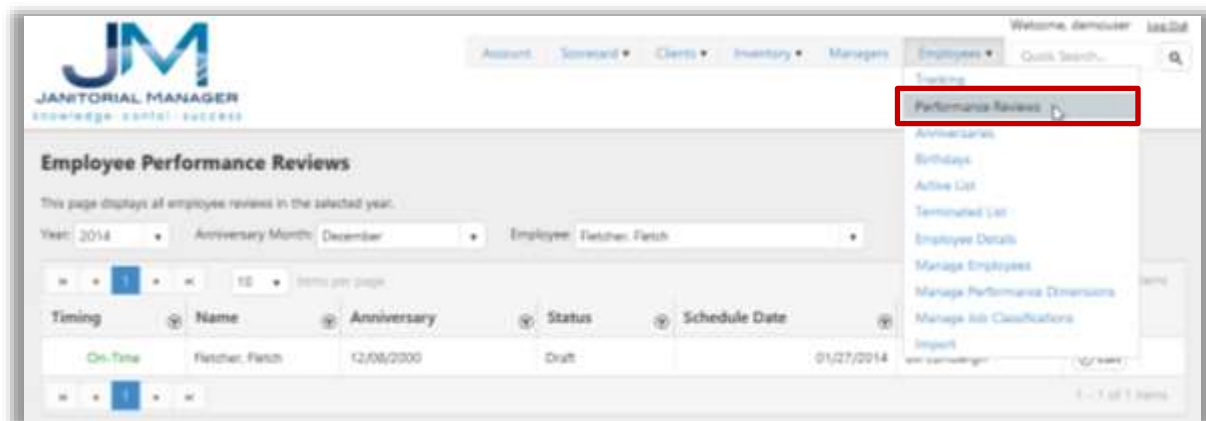


Figure 157

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

Completing a Performance Review

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

The screenshot shows the 'Employee Performance Reviews' page in the Janitorial Manager software. The page is titled '2014 Annual Review' and features a form for reviewing an employee named Michael Stasi, hired on 12/16/2013. The form includes sections for 'Accomplishments', 'Improvement Opportunities', and 'Performance Dimensions'. The 'Performance Dimensions' section is expanded, showing categories like 'Follows Direction', 'No Spec Left Behind', 'On Time', 'Appearance', and 'Customer Relations'. Each category has a 'Not Rated' dropdown menu. A 'Save' button is located at the top right. Red callout numbers 1 through 10 point to various fields: 1 points to the 'Review Schedule Date' field; 2 points to the 'Review Manager' dropdown; 3 points to the 'Accomplishments' text area; 4 points to the 'Improvement Opportunities' text area; 5 points to the 'Current Wage' field; 6 points to the 'New Wage' field; 7 points to the 'Effective Date' field; 8 points to the 'Performance Dimensions' section; 9 points to the 'Not Rated' dropdown for 'Follows Direction'; and 10 points to the 'Not Rated' dropdown for 'Appearance'.

Figure 158

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

Performance Reviews - At a Glance

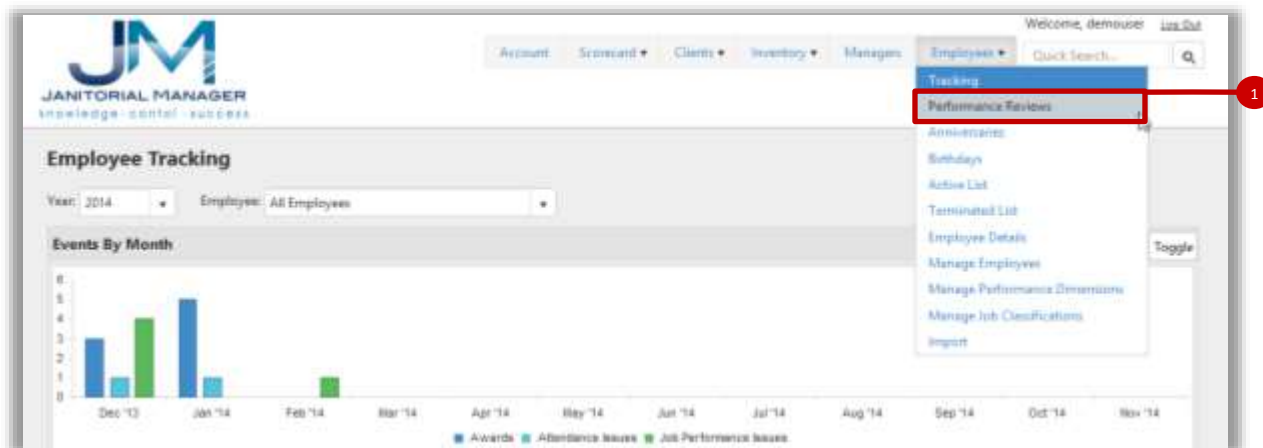


Figure 159

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

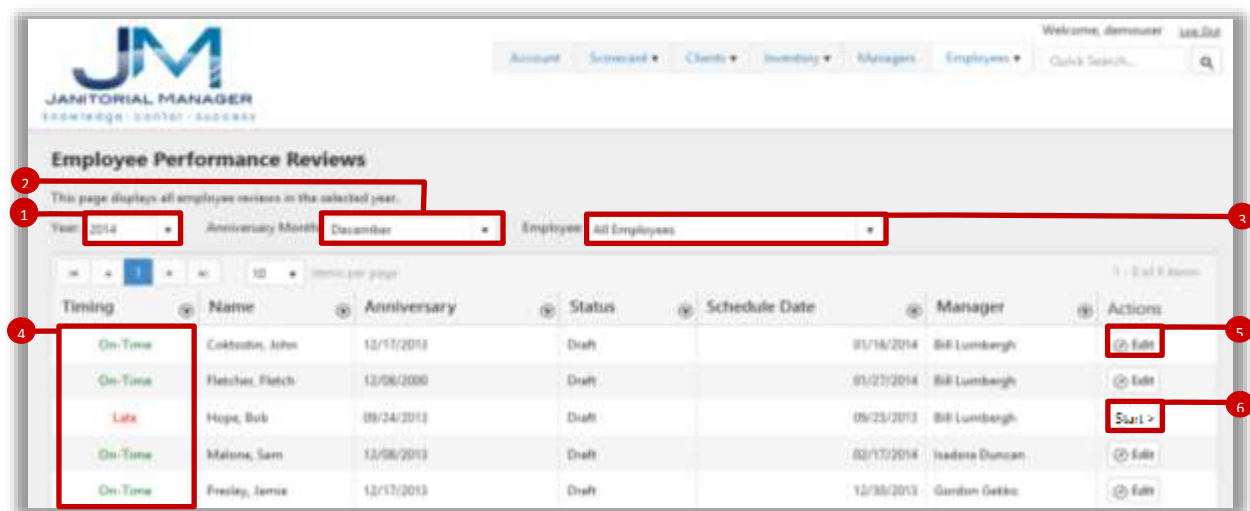


Figure 160

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

Employee Anniversaries

The screenshot shows the 'Employee Anniversaries' page in the Janitorial Manager software. The page header includes the JIM logo and navigation tabs: Account, Schedules, Clients, Inventory, Managers, Employees, and a Quick Search bar. The main heading is 'Employee Anniversaries' with a subtext: 'This list shows all employee anniversaries during the selected month.' Below this, there is a 'Month' dropdown menu set to 'December', with an 'Export' button and a 'Print' icon. A table of employees is displayed with columns: Name, Hire Date, Years, Address, City, State, Zip, Home, and Cell. The first row, 'Calkins, John', is highlighted with a red box and a red circle with the number 2. The table also includes pagination controls at the bottom.

Name	Hire Date	Years	Address	City	State	Zip	Home	Cell
Calkins, John	12/17/2013	1						
Hatchar, Patrick	12/08/2000	14	2 Bob's Your Uncle Lane	Windsburg	AK	44441		
Malone, Sam	12/08/2013	1	21 Cheers Blvd	Boston	MA	14543	656-889-4858	
Prokes, Jamie	12/17/2013	1						
Smith, Tommy	12/01/2013	1	7 Mahagna Rd	penacola	TH	33345	256-777-3453	256-777-8808
Stamps, Michael	12/15/2013	1	avenue			35703		
Tyler, Tina	12/08/2013	1	somestreet	SomeCity	AL	12345		

Figure 161

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

Employee Birthdays

The screenshot shows the 'Employee Birthdays' page in the Janitorial Manager software. The page header is identical to the previous figure. The main heading is 'Employee Birthdays' with a subtext: 'This list shows all employee birthdays during the selected month.' Below this, there is a 'Month' dropdown menu set to 'August', with an 'Export' button and a 'Print' icon. A table of employees is displayed with columns: Name, Birth Date, Hire Date, Years, Address, City, State, Zip, Home, and Cell. The first row, 'Smith, Tommy', is highlighted with a red box and a red circle with the number 2. The table also includes pagination controls at the bottom.

Name	Birth Date	Hire Date	Years	Address	City	State	Zip	Home	Cell
Smith, Tommy	08/01/2013	12/01/2013	1	7 Mahagna Rd	penacola	TH	33345	256-777-3453	256-777-8808

Figure 162

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

Active Employee List

1. Export Print

2. Cockerton, John

Name	Years	Address	City	State	Zip	Home	Cell
Cockerton, John	1						
Fletcher, Fletcher	14	2 Bob's Your Uncle Lane	Wittsburg	AK	44481		
Harley, Ed	0				44443		
Hope, Bob	1						
Malone, Sam	1	21 Cheen Blvd	Boston	MA	14541	616-909-4858	

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

1. Export Print

2. Spaydak, Max

Name	Termination Date	Address	City	State	Zip	Home	Cell
Spaydak, Max	03/13/2014	1 Simpsons st	Springfield	MO	65806	219-232-2344	

Figure 164

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

Employee Details

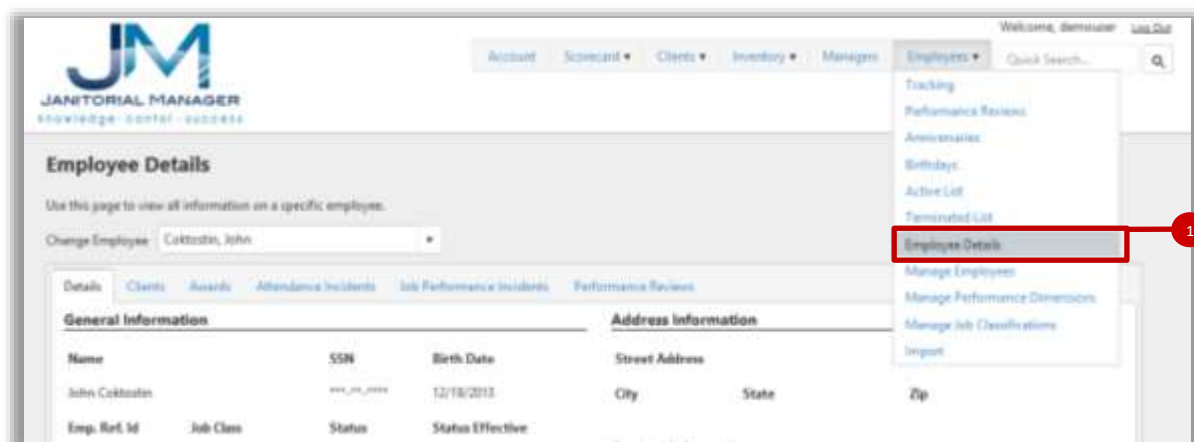


Figure 165

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

Identify Client Account Employee Training

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

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

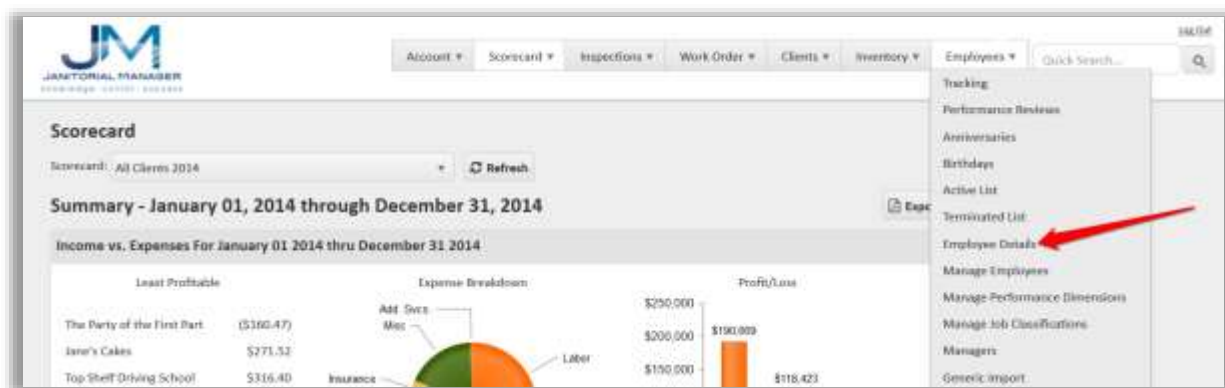


Figure 166

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

Employee Details

Use this page to view all information on a specific employee.

Change Employee: Bloor, Franklin

General Information

Name	Franklin Bloor
Birth Date	6/1/1970
Status Effective	2/20/2016

Address Information

Street Address	wdqwd
City	Huntsville
State	AL
Zip	35803

Figure 167

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

Employee Details

Use this page to view all information on a specific employee.

Change Employee: Bloor, Franklin

Clients

General Information

Name	Franklin Bloor
SSN	***-**-****
Birth Date	6/1/1970

Address Information

Street Address	wdqwd
City	Huntsville
State	AL
Zip	35803

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.

Employee Details

Employee now listed as trained for this client.

Use this page to view all information on a specific employee.

Change Employee: Bloor, Franklin

Clients

Name	Trained?	Actions
AMM Test Client	Trained	Remove
Anne's Accounting Service	Not Trained	+ Add
Bank of America	Not Trained	+ Add

Figure 169

View Client Account Employee Training

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

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

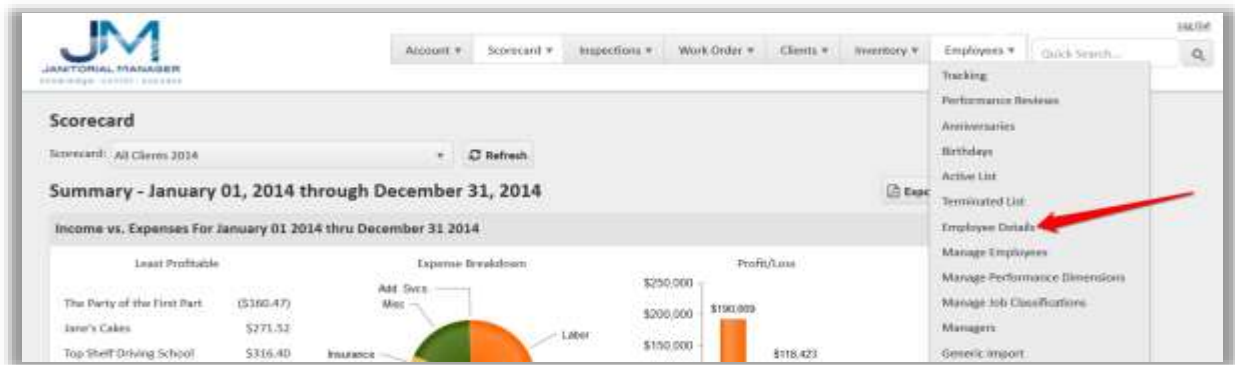


Figure 170

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

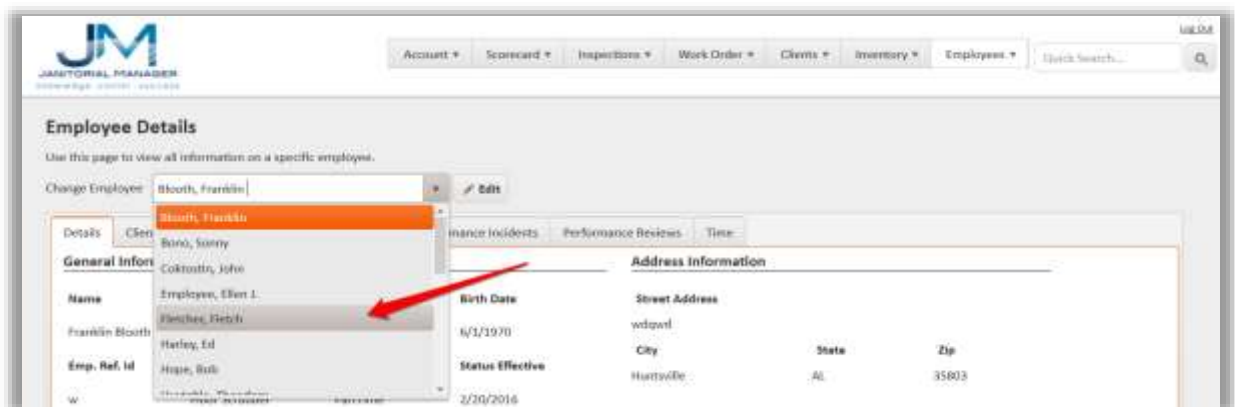


Figure 171

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

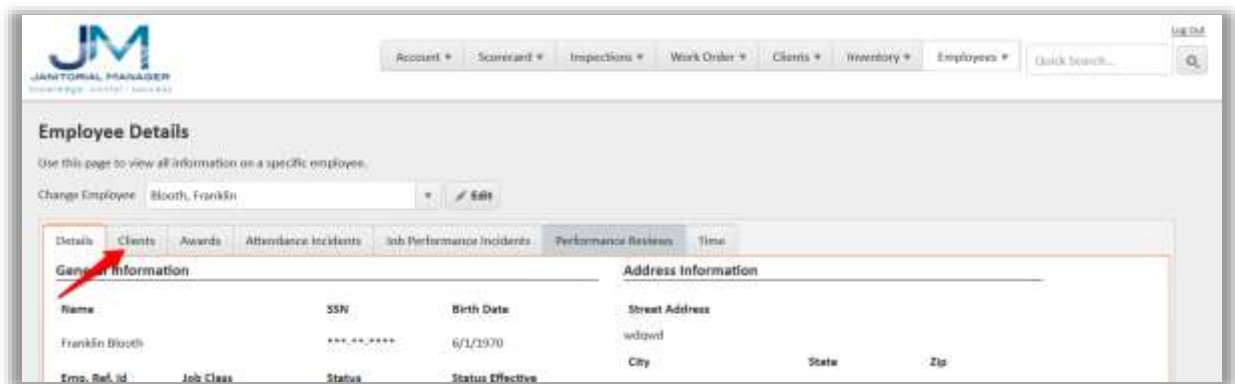


Figure 172

A list of available clients will be displayed.

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

The screenshot shows the 'Employee Details' page for John Coktostin. The 'Clients' tab is selected, showing a table of clients. The 'Trained?' column has a dropdown menu open, allowing filtering by 'is true' or 'is false'. A red arrow points to the 'Filter' button.

Name	Trained?	Actions
ACME Wholesale	Not Trained	<div>Show items with value that: <input checked="" type="checkbox"/> is true <input type="checkbox"/> is false <div>Filter Clear</div><div>+ Add x Remove</div></div>
Anne's Armory and Sub Shop	Trained	
Big Guns Gym & Pet Grooming	Not Trained	
Good People Brewing Company	Not Trained	
Starbucks Addiction Treatment Center	Not Trained	
Sunshine Carpet Cleaners	Trained	

Figure 173

View Active Employees

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

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

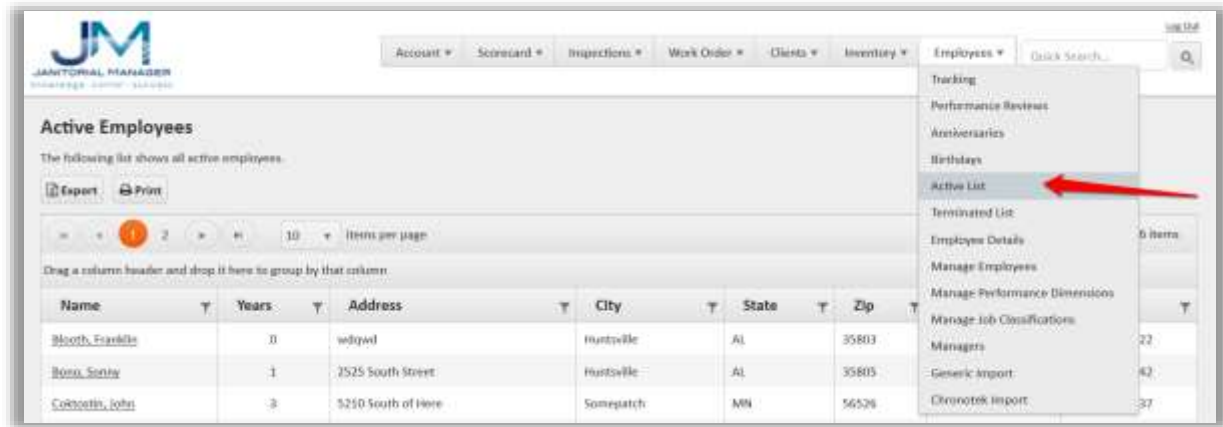


Figure 174

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

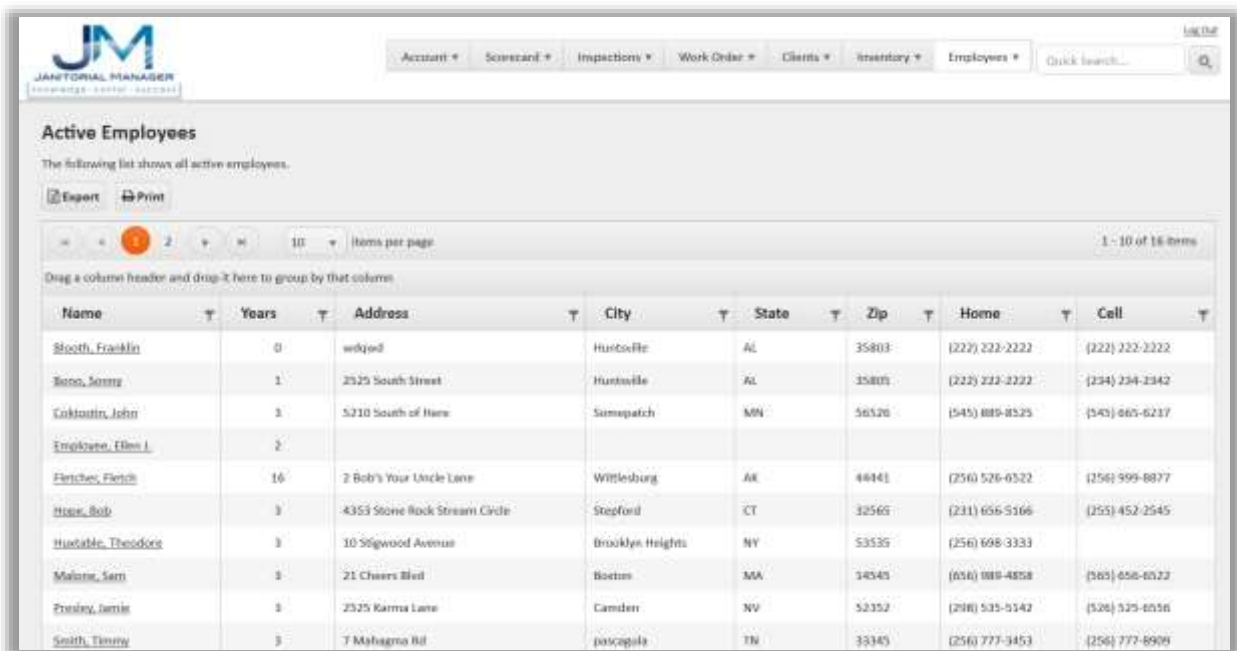


Figure 175

Manage Supplies

Add Supply Vendors

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

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

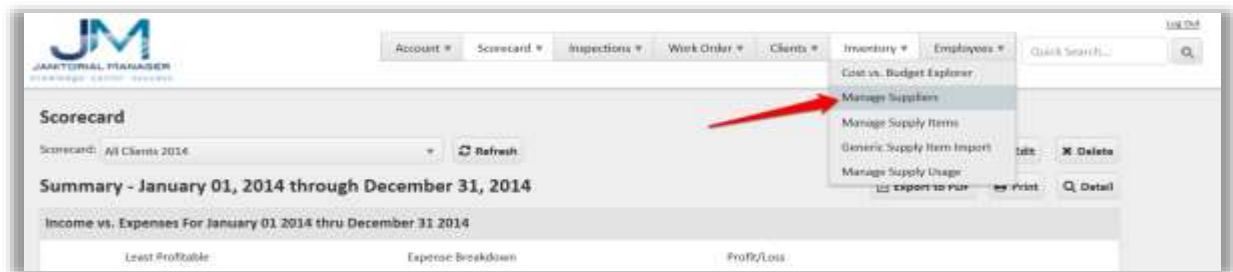


Figure 176

The current list of suppliers will be displayed.

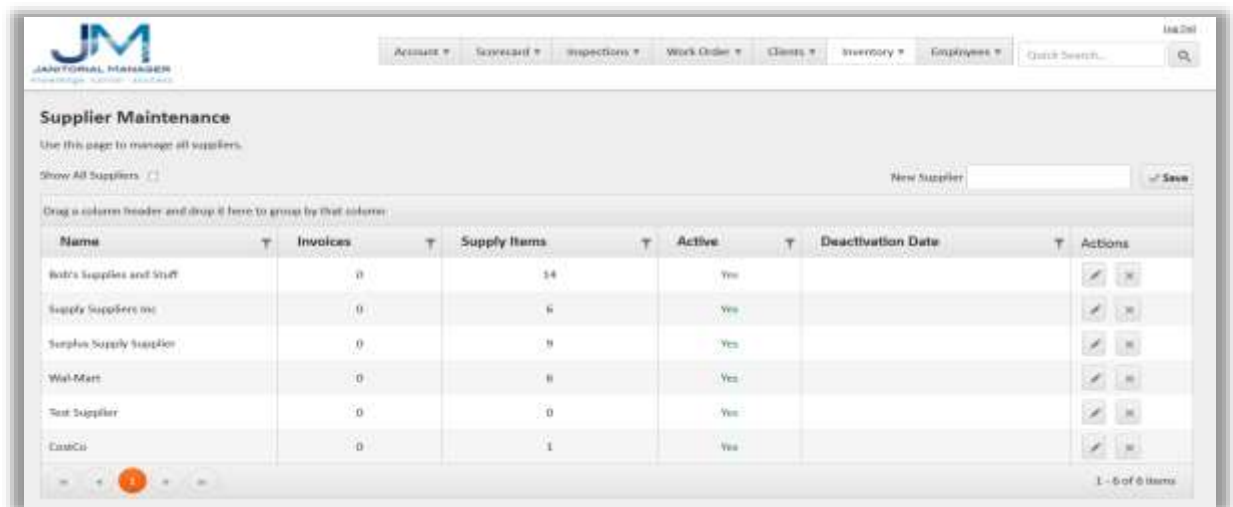


Figure 177

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

Editing a Supplier

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

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

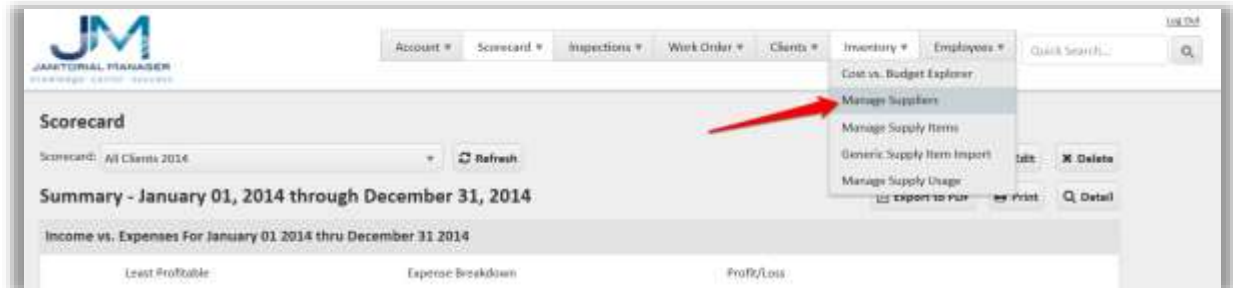


Figure 178

The current list of suppliers will be displayed.

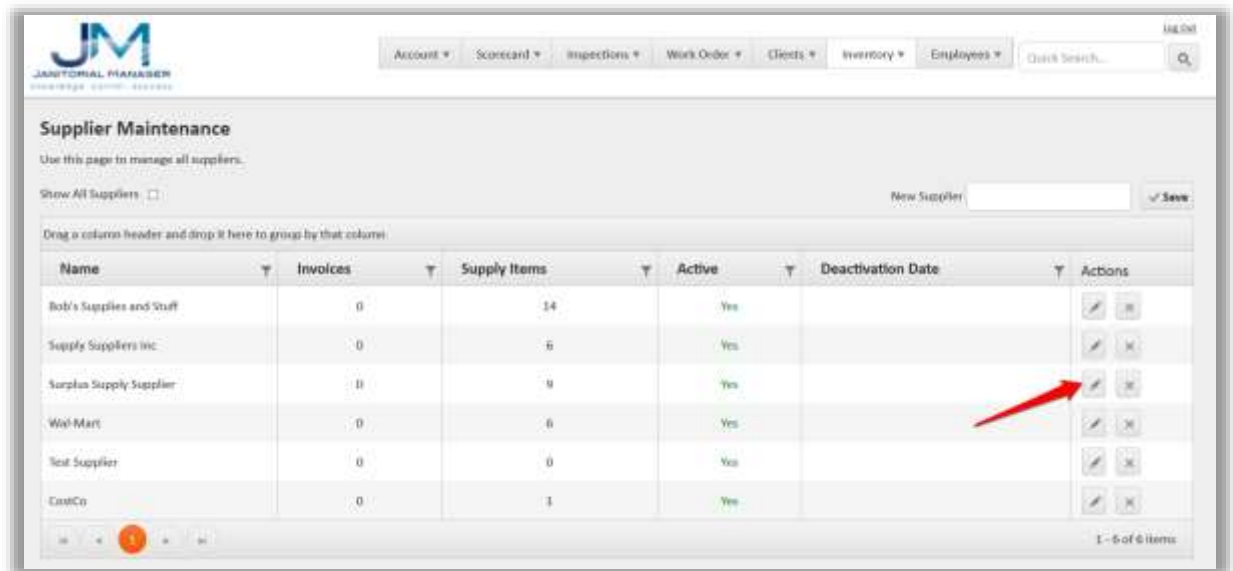


Figure 179

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



Figure 180

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

Deleting a Supplier

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

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

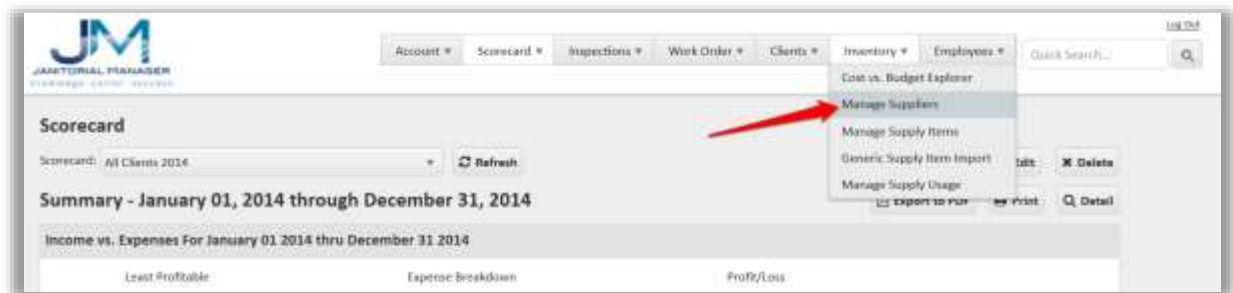


Figure 181

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

The current list of suppliers will be displayed.

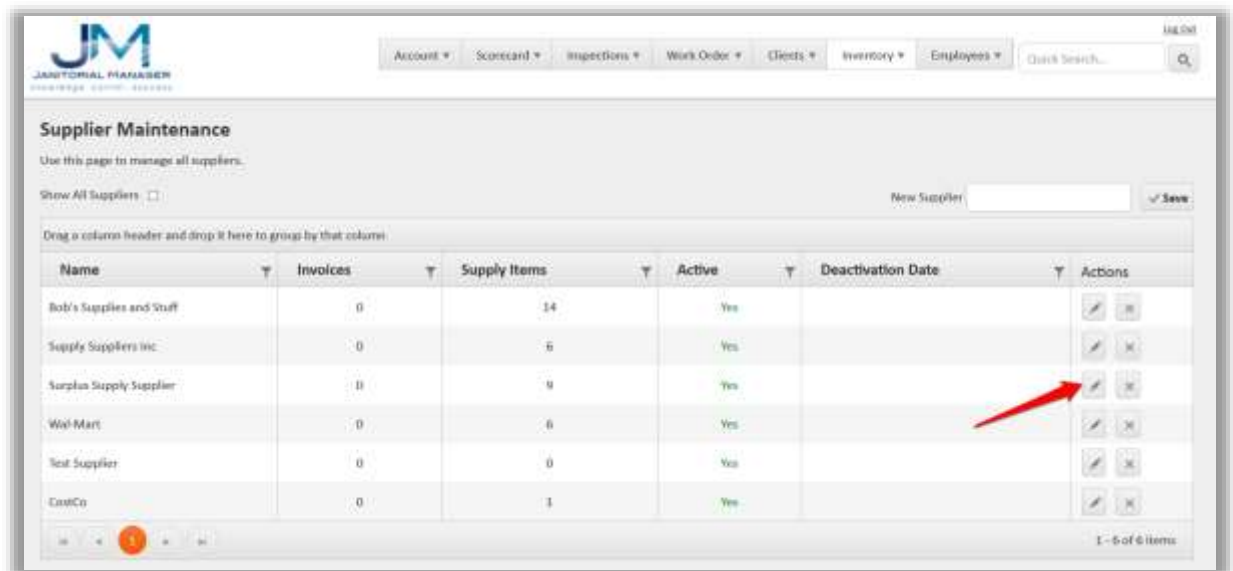


Figure 182

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

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

Adding a Supply Inventory Item

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

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

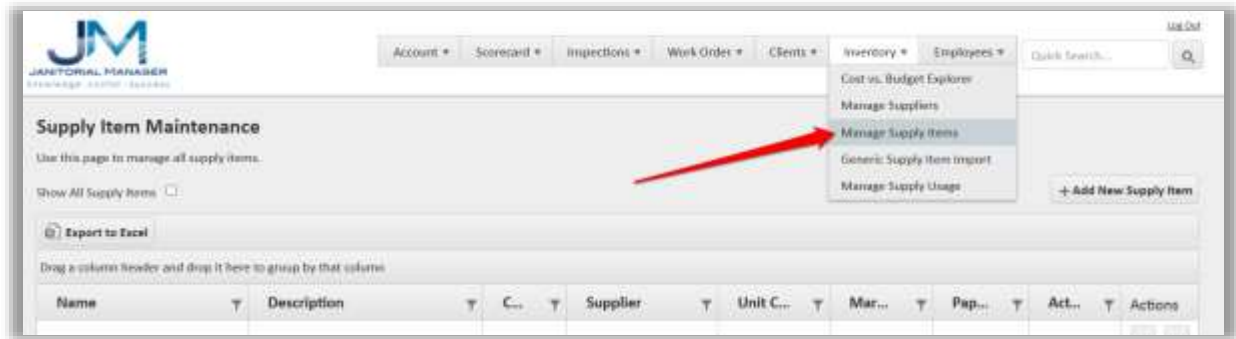


Figure 183

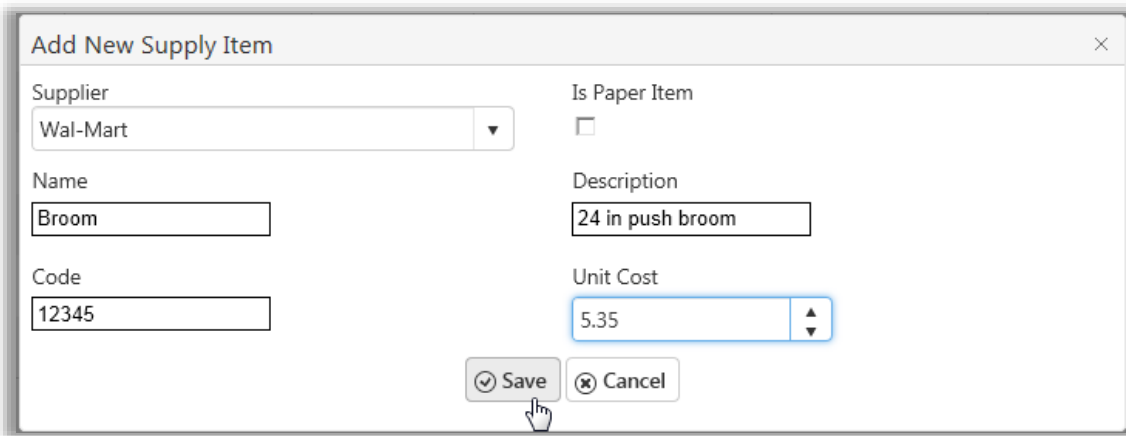
The current list of Supply Items will be displayed.

The screenshot shows the Janitorial Manager (JM) interface with the 'Supply Item Maintenance' page. The 'Inventory' tab is selected, and the 'Manage Supply Items' option is highlighted in the dropdown menu. Below the tabs, the 'Supply Item Maintenance' section is visible, with a sub-header 'Use this page to manage all supply items.' and a 'Show All Supply Items' checkbox. There is an 'Export to Excel' button and a table with columns: Name, Description, C., Supplier, Unit C., Mar..., Pap..., Act..., and Actions. The table contains the following data:

Name	Description	C.	Supplier	Unit C.	Mar...	Pap...	Act...	Actions
Alpha Clean Scrubbing Stuff - 1 Gal	Alpha Clean Scrubbing Stuff - 1 Gal - ea		Bob's Supplies and Stuff	\$14.99	\$0.00	No	Yes	[Edit] [Delete]
Andy's Famous Paint Remover	Andy's Famous Paint Remover		Surplus Supply Supplier	\$8.54	\$0.00	No	Yes	[Edit] [Delete]
Back Brace	Back Brace		Bob's Supplies and Stuff	\$25.00	\$0.00	No	Yes	[Edit] [Delete]
Broom	24 in push broom	12345	Wal-Mart	\$6.50	\$0.00	No	Yes	[Edit] [Delete]
Broom - 48" Push	Broom - 48" Push		Bob's Supplies and Stuff	\$22.00	\$0.00	No	Yes	[Edit] [Delete]
Buffer - 1000RPM - 18" Clarke	18" Electric Buffer - 1000RPM / Clarke	25658	Bob's Supplies and Stuff	\$5.25	\$0.00	No	Yes	[Edit] [Delete]
Buffer Pad - Black	Buffer Pad - Black - ea		Supply Suppliers Inc	\$7.99	\$0.00	No	Yes	[Edit] [Delete]
Buffer Pad - Green	Green Buffer Pad		Surplus Supply Supplier	\$6.00	\$0.00	No	Yes	[Edit] [Delete]

Figure 184

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



The 'Add New Supply Item' dialog box contains the following fields and controls:

- Supplier:** A dropdown menu with 'Wal-Mart' selected.
- Is Paper Item:** An unchecked checkbox.
- Name:** A text input field containing 'Broom'.
- Description:** A text input field containing '24 in push broom'.
- Code:** A text input field containing '12345'.
- Unit Cost:** A numeric input field with a spinner, containing '5.35'.
- Buttons:** 'Save' (with a checkmark icon) and 'Cancel' (with an 'X' icon).

Figure 185

Note: if the supplier is not present in the Supplier dropdown list, [go to Add Supplier Details...](#)

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

Editing a Supply Inventory Item

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

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

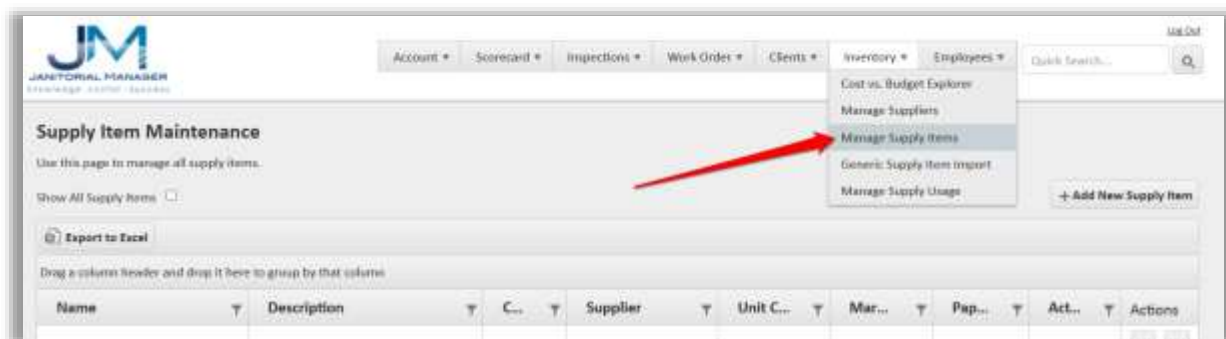
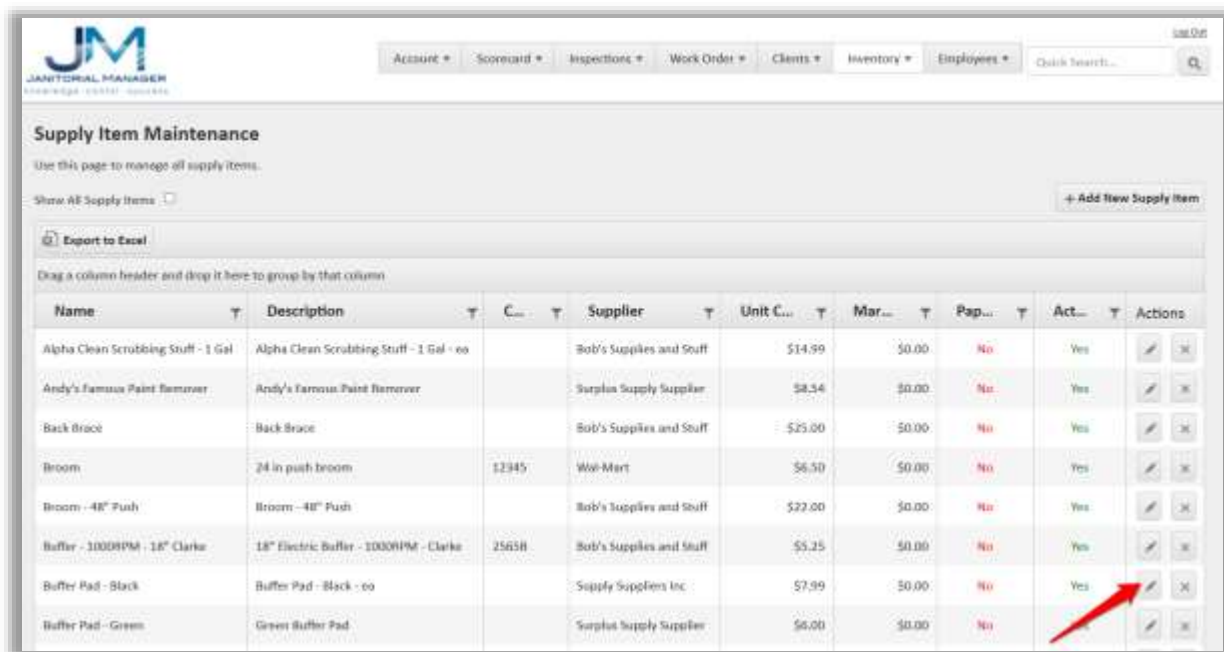


Figure 186

The current list of Supply Items will be displayed.



Supply Item Maintenance
Use this page to manage all supply items.

Show All Supply Items ☐ [+ Add New Supply Item](#)

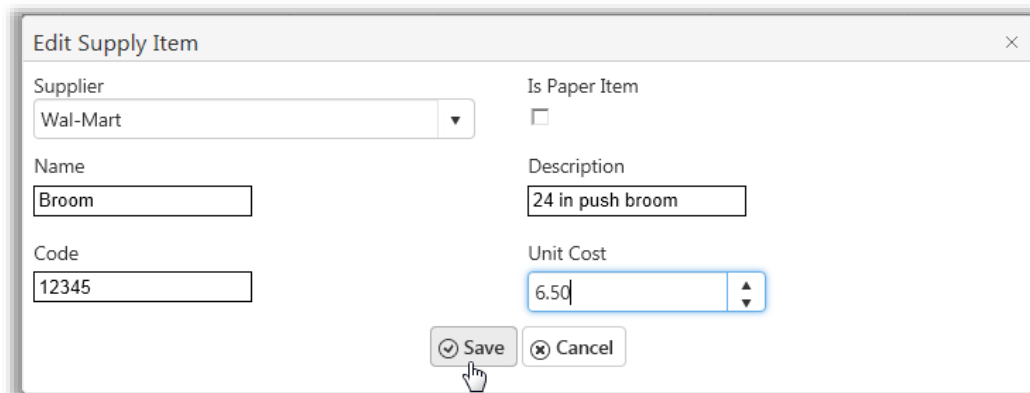
[Export to Excel](#)

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

Name	Description	C...	Supplier	Unit C...	Mar...	Pap...	Act...	Actions
Alpha Clean Scrubbing Stuff - 1 Gal	Alpha Clean Scrubbing Stuff - 1 Gal - eo		Bob's Supplies and Stuff	\$14.99	\$0.00	No	Yes	
Andy's Famous Paint Remover	Andy's Famous Paint Remover		Surplus Supply Supplier	\$8.54	\$0.00	No	Yes	
Back Brace	Back Brace		Bob's Supplies and Stuff	\$25.00	\$0.00	No	Yes	
Broom	24 in push broom	12345	Wal-Mart	\$6.50	\$0.00	No	Yes	
Broom - 48" Push	Broom - 48" Push		Bob's Supplies and Stuff	\$22.00	\$0.00	No	Yes	
Buffer - 1000RPM - 18" Clarke	18" Electric Buffer - 1000RPM - Clarke	2565B	Bob's Supplies and Stuff	\$5.25	\$0.00	No	Yes	
Buffer Pad - Black	Buffer Pad - Black - eo		Supply Supplies Inc	\$7.99	\$0.00	No	Yes	
Buffer Pad - Green	Green Buffer Pad		Surplus Supply Supplier	\$6.00	\$0.00	No	Yes	

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: Wal-Mart

Is Paper Item: ☐

Name: Broom

Description: 24 in push broom

Code: 12345

Unit Cost: 6.50

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 it inactivates the item such that it is no longer listed in dropdown boxes when recording inventory supply item usages.

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



Figure 189

The current list of Supply Items will be displayed.

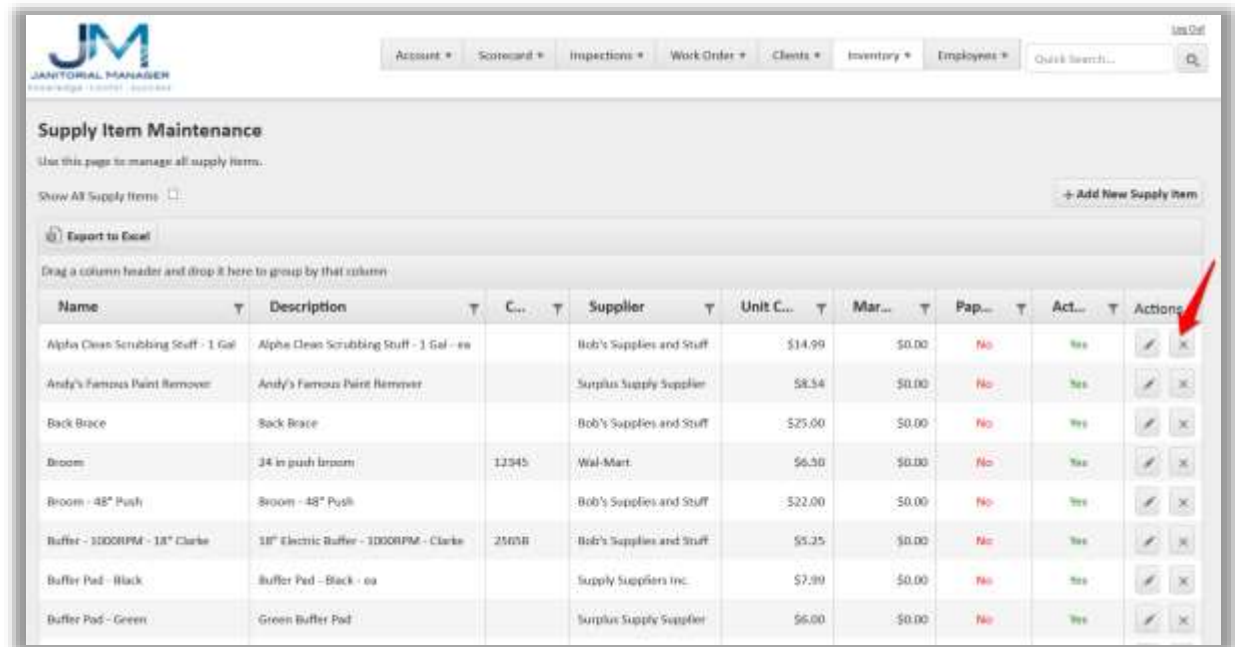


Figure 190

Locate the row in the table containing the supply item that needs 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 into JM via the Supply Usage section or keyed directly into JM.

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

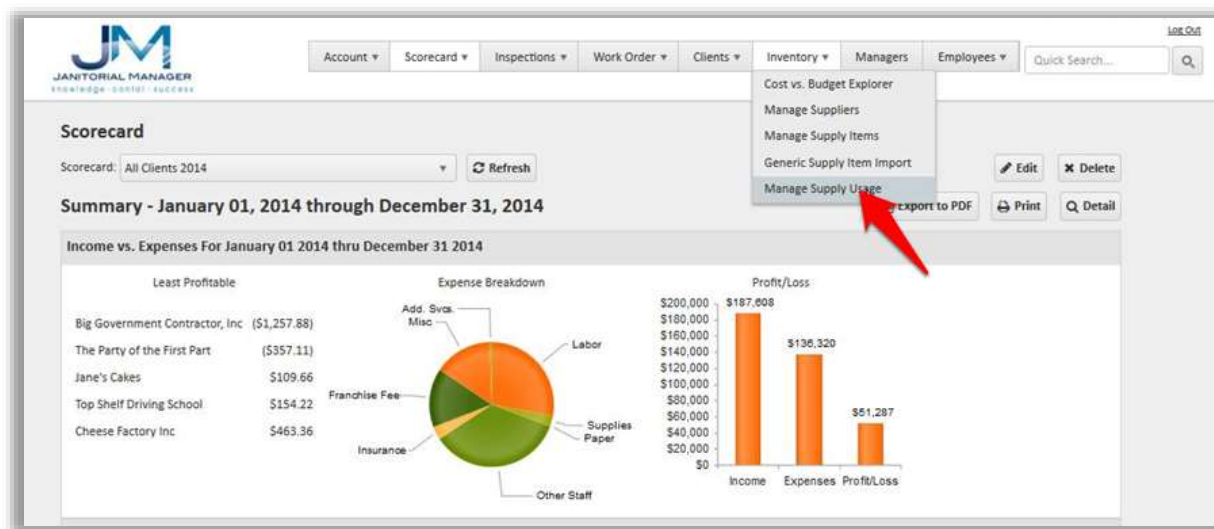


Figure 191

A current list of supply usage transactions will be displayed

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

Supply Usage Maintenance

Use this page to manage supply usage records. To add a new list, select a client from the list.

Client: Filter Client Start Date: 01/14/2016 End Date: 04/13/2016 [Refresh] **+ Add**

Client	Date	Items	Note	Actions
Big Government Contractor, Inc.	03/14/2016	Cost: \$31.50 Items: 2		[Edit] [Delete] [Print]
Bank of America	03/11/2016	Cost: \$152.34 Items: 4		[Edit] [Delete] [Print]
Anne's Accounting Service	01/09/2016	Cost: \$71.50 Items: 3		[Edit] [Delete] [Print]
KMation	01/09/2016	Cost: \$40.49 Items: 3		[Edit] [Delete] [Print]
Big Government Contractor, Inc.	03/07/2016	Cost: \$73.34 Items: 7		[Edit] [Delete] [Print]
Anne's Accounting Service	03/02/2016	Cost: \$44.50 Items: 3		[Edit] [Delete] [Print]

Figure 192

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

[Return to Table Of Contents](#)

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

The screenshot shows the JAMTORTAL MANAGER web application. At the top, there is a navigation bar with tabs for Account, Scorecard, Inspections, Work Order, Clients, Inventory, and Employees. A 'Log Out' link is on the far right. Below the navigation bar, a message states: 'Use this page to manage supply usage records inside of this list.' A '< Back' button is present. The 'Client' dropdown menu is open, displaying a list of clients: 'Select Client', 'AMM Test Client', 'Anne's Accounting Service' (highlighted with a red arrow), 'Bank of America', 'Big Government Contractor, Inc.', 'Big Gums Gym & Pet Grooming', 'Big Joe's Auto Sales', and 'Cheese Factory Inc.'. Below the dropdown, there are input fields for 'City', 'State', and 'Zip Code', and a 'Save' button at the bottom.

Figure 193

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

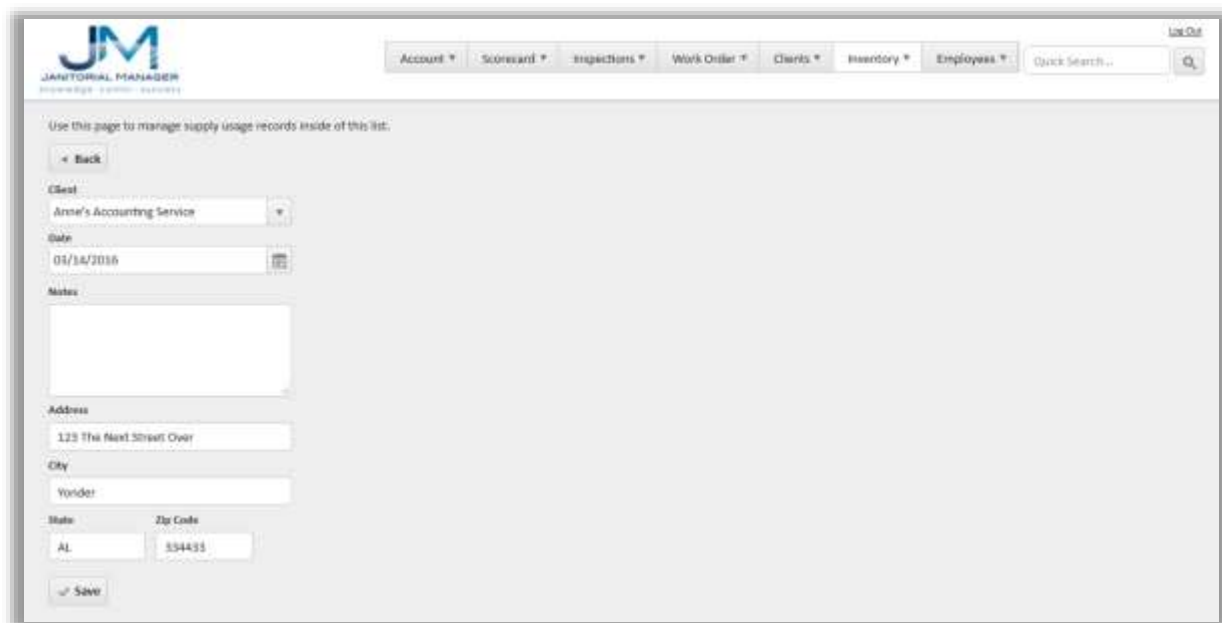
The screenshot shows the same JAMTORTAL MANAGER interface, but now the client information is populated. The 'Client' dropdown is set to 'Anne's Accounting Service'. The 'Date' field is filled with '01/14/2016'. The 'Notes' section is a large empty text area. The 'Address' field is filled with '123 The Next Street Over'. The 'City' field is filled with 'Yonder'. The 'State' field is filled with 'AL' and the 'Zip Code' field is filled with '334433'. A 'Save' button is at the bottom.

Figure 194

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

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

Figure 195

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

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

Supply Item	Unit Cost	Qty	Cost	Actions
Broom - 24 in push broom - Wal-Mart	\$6.50	1.00	\$32.50	Remove
Totals:		1.00	\$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.

Client	Date	Items	Note	Actions
Anne's Accounting Service	05/13/2015	Cost: \$76.00 Items: 4	Take Notes Here!	[Edit] [Delete] [Print]

Figure 197

Copying a Supply Usage Record

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

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

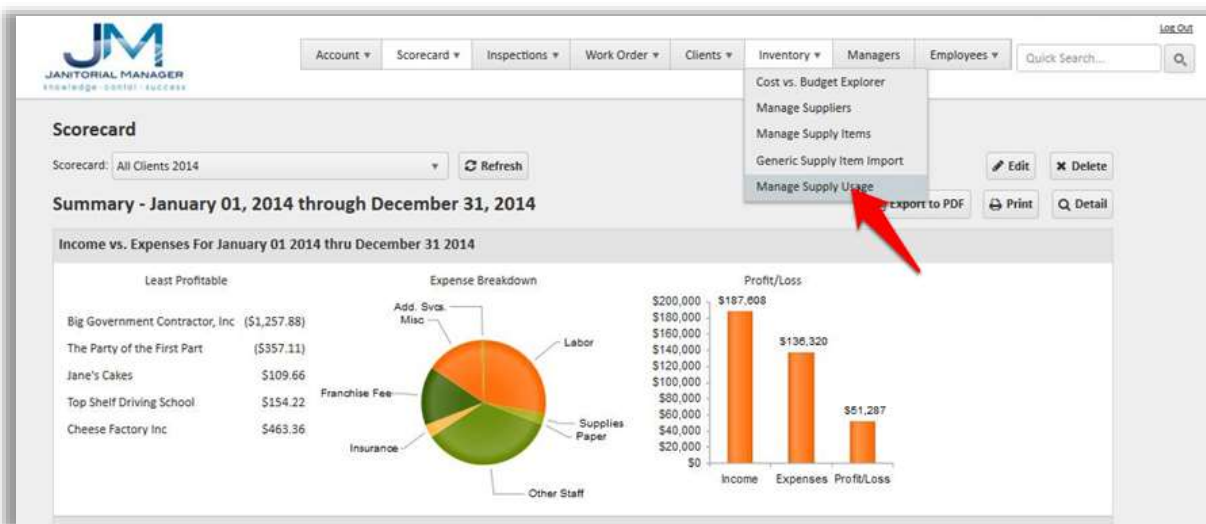


Figure 198

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

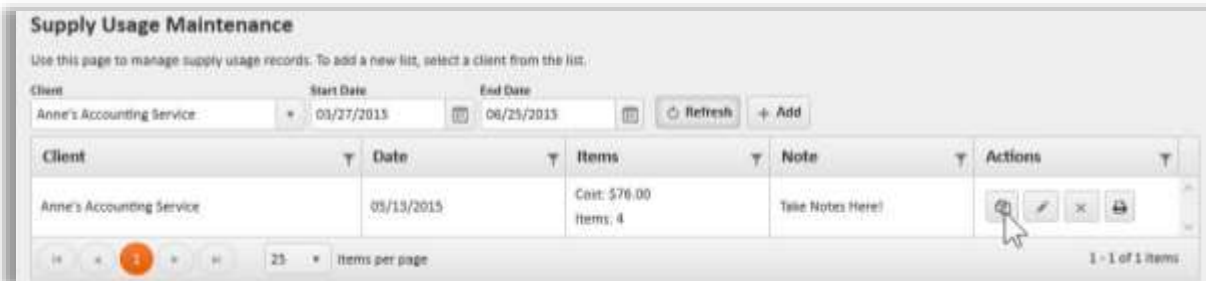


Figure 199

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

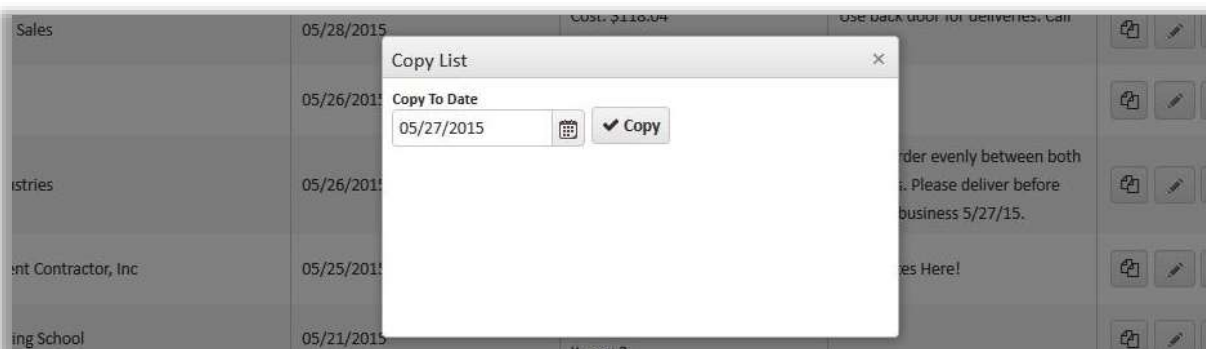


Figure 200

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

Use this page to manage supply usage records inside of this list.

← Back

GENERAL SUPPLIES

Client
Big Joe's Auto Sales

Date
05/27/2015

Notes
Use back door for deliveries. Call first.

Address
123 Street St

City
Huntspatch

State
Al.

Zip Code
25663

Save

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.

Use this page to manage supply usage records inside of this list.

← Back

GENERAL **SUPPLIES**

Supply Item
Select Supply Item

Unit Cost
\$0.00

Quantity
1.00

+ Add

Supply List Items

Supply Item	Unit Cost	Qty	Cost	Actions
Andy's Famous Paint Remover - Andy's Famous Paint Remover ⓘ	\$8.54	1.00	\$8.54	Remove
Broom - 24 in push broom ⓘ	\$6.50	1.00	\$6.50	Remove
Duster - Feather - 15" Feather Duster. ⓘ	\$90.00	1.00	\$90.00	Remove
Spitfire - Gallon Mixed - Spitfire ⓘ	\$13.00	1.00	\$13.00	Remove
Totals:		4.00	\$118.04	

Figure 202

Editing a Supply Usage Record

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

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

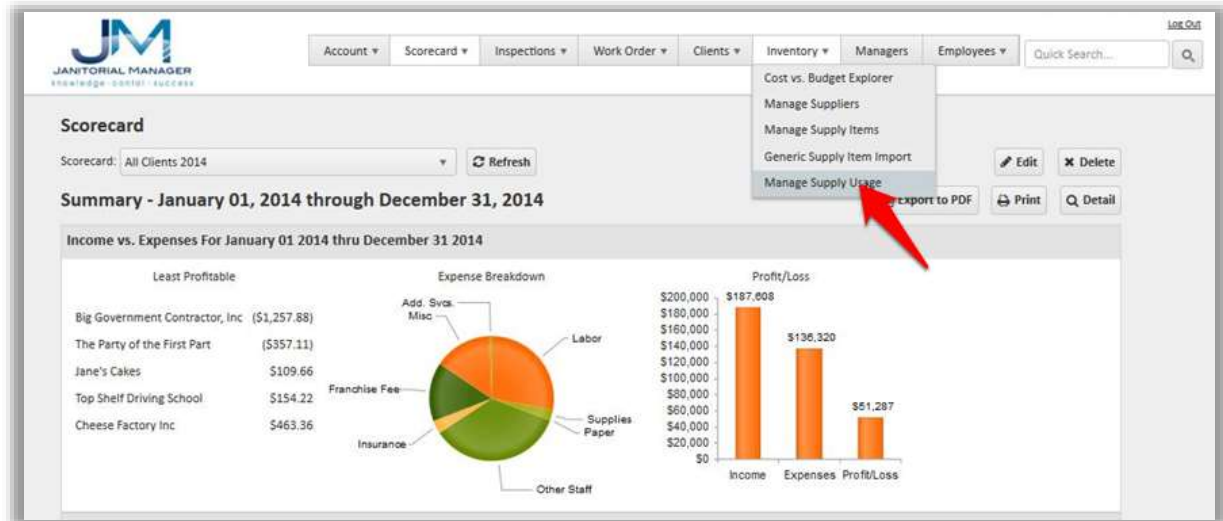


Figure 203

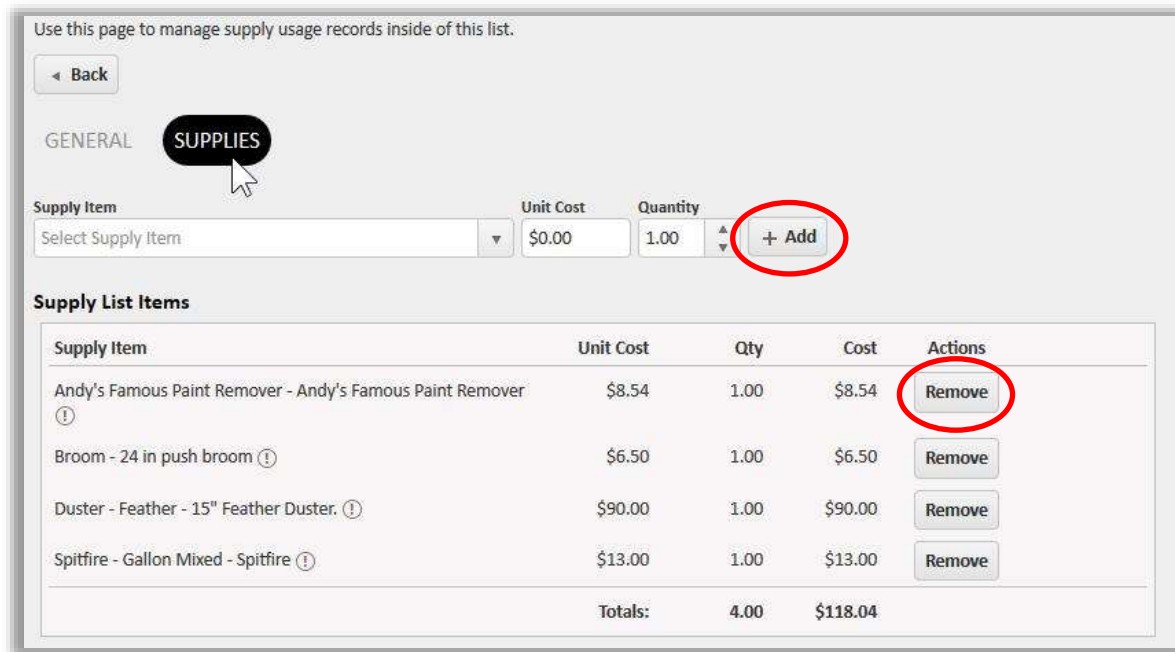
A current list of Supply Usage transactions will be displayed. Locate the row in the table containing the specific transaction that needs to be edited and then select the **Edit** button Figure 203.

The screenshot shows the 'Supply Usage Maintenance' page. It includes a table with columns: Client, Date, Items, Note, and Actions. A red arrow points to the 'Edit' button in the Actions column for the row with Client 'Big Government Contractor, Inc' and Date '03/14/2016'.

Client	Date	Items	Note	Actions
Anne's Accounting Service	03/15/2016	Cost: \$32.50 Items: 5		[Edit] [Delete] [Add] [Print]
Anne's Accounting Service	03/24/2016	Cost: \$33.50 Items: 5		[Edit] [Delete] [Add] [Print]
Big Government Contractor, Inc	03/14/2016	Cost: \$41.50 Items: 2		[Edit] [Delete] [Add] [Print]
Bank of America	03/11/2016	Cost: \$152.54 Items: 4		[Edit] [Delete] [Add] [Print]
Anne's Accounting Service	03/09/2016	Cost: \$71.55 Items: 3		[Edit] [Delete] [Add] [Print]

Figure 204

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



Use this page to manage supply usage records inside of this list.

◀ Back

GENERAL **SUPPLIES**

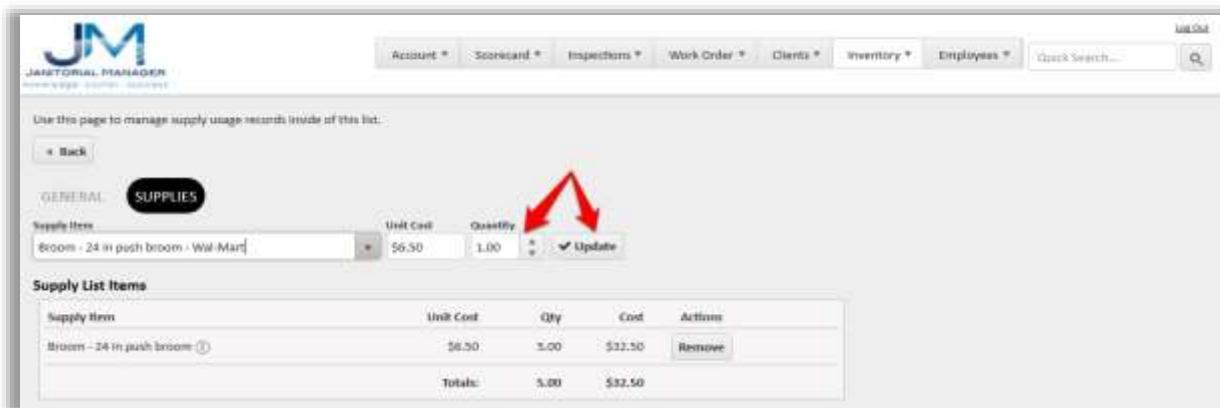
Supply Item: Select Supply Item ▼ Unit Cost: \$0.00 Quantity: 1.00 **+ Add**

Supply List Items

Supply Item	Unit Cost	Qty	Cost	Actions
Andy's Famous Paint Remover - Andy's Famous Paint Remover ⓘ	\$8.54	1.00	\$8.54	Remove
Broom - 24 in push broom ⓘ	\$6.50	1.00	\$6.50	Remove
Duster - Feather - 15" Feather Duster. ⓘ	\$90.00	1.00	\$90.00	Remove
Spitfire - Gallon Mixed - Spitfire ⓘ	\$13.00	1.00	\$13.00	Remove
Totals:		4.00	\$118.04	

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.



Use this page to manage supply usage records inside of this list.

◀ Back

GENERAL **SUPPLIES**

Supply Item: Broom - 24 in push broom - Wal-Mart ▼ Unit Cost: \$6.50 Quantity: 1.00 **Update**

Supply List Items

Supply Item	Unit Cost	Qty	Cost	Actions
Broom - 24 in push broom ⓘ	\$6.50	1.00	\$6.50	Remove
Totals:		1.00	\$6.50	

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.

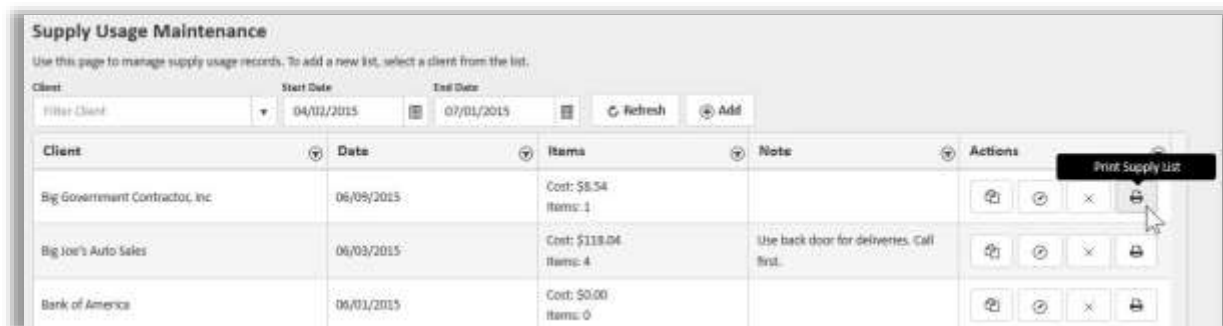


Figure 207

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

The screenshot shows the 'Supply List' form. At the top left is the 'JM JANITORIAL MANAGER' logo with the tagline 'knowledge - control - success'. The title 'Supply List' is centered at the top. Below the header, there's a section for client information: 'CLIENT' (Big Government Contractor, Inc.), 'LOCATION' (15 Street Street, Arab, AL 55665), and 'DATE' (06/09/2015). Underneath is a section titled 'SUPPLIES' containing a list of items, each with a checkbox and a quantity. The items are: Alpha Clean Scrubbing Stuff - 1 Gal - Alpha Clean Scrubbing Stuff - 1 Gal - ea (Bob's Supplies and Stuff) Qty: 1; Andy's Famous Paint Remover - Andy's Famous Paint Remover (Surplus Supply Supplier) Qty: 1; Back Brace - Back Brace (Bob's Supplies and Stuff) Qty: 1; Broom - 24 in push broom (Wal-Mart) Qty: 1; Broom - 48" Push - Broom - 48" Push (Bob's Supplies and Stuff) Qty: 1; Buffer Pad - Black - Buffer Pad - Black - ea (Supply Suppliers Inc) Qty: 1; Buffer Pad - Green - Green Buffer Pad (Surplus Supply Supplier) Qty: 1; Buffer Pad - Red - Buffer Pad - Red (Surplus Supply Supplier) Qty: 1; Duster - Feather - 15" Feather Duster. (Bob's Supplies and Stuff) Qty: 1; Mop Bucket with Side Wringer 26 QT - Mop Bucket (CostCo) Qty: 1; Mop Handle - 60" Wood Quick Release - Mop Handle (Supply Suppliers Inc) Qty: 1; Rag Swap - 1 to 1 Clean Rag exchange (Bob's Supplies and Stuff) Qty: 1; Spitfire - Gallon Mixed - Spitfire (Bob's Supplies and Stuff) Qty: 1. At the bottom, there are two signature lines: 'MANAGER SIGNATURE' and 'CUSTOMER SIGNATURE'.

Figure 208

Delete a Supply Usage Record

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

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



Figure 209

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

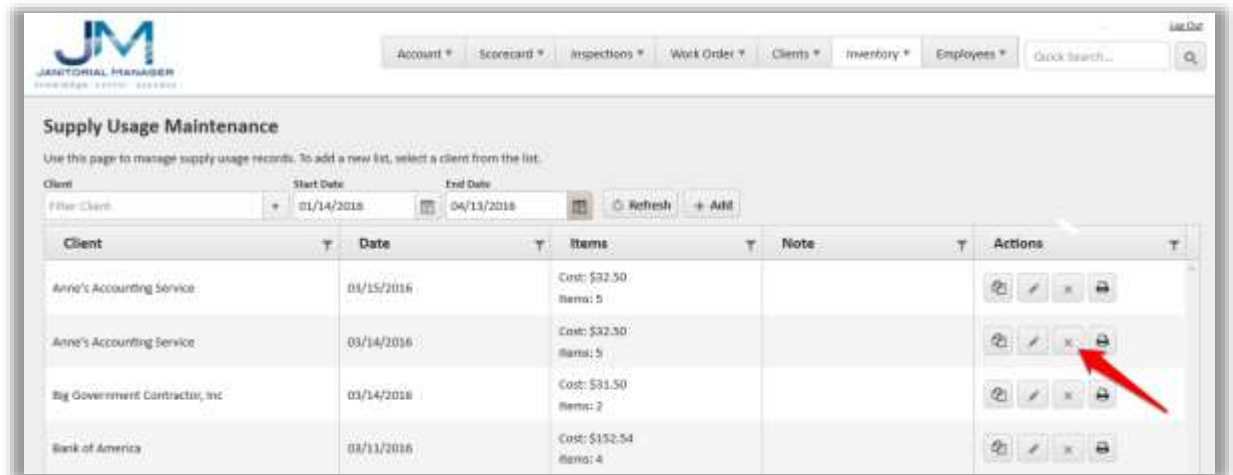


Figure 210

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



Figure 211

Sorting Supply Usage Records

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

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



Figure 212

A current list of supply usage transactions will be displayed.

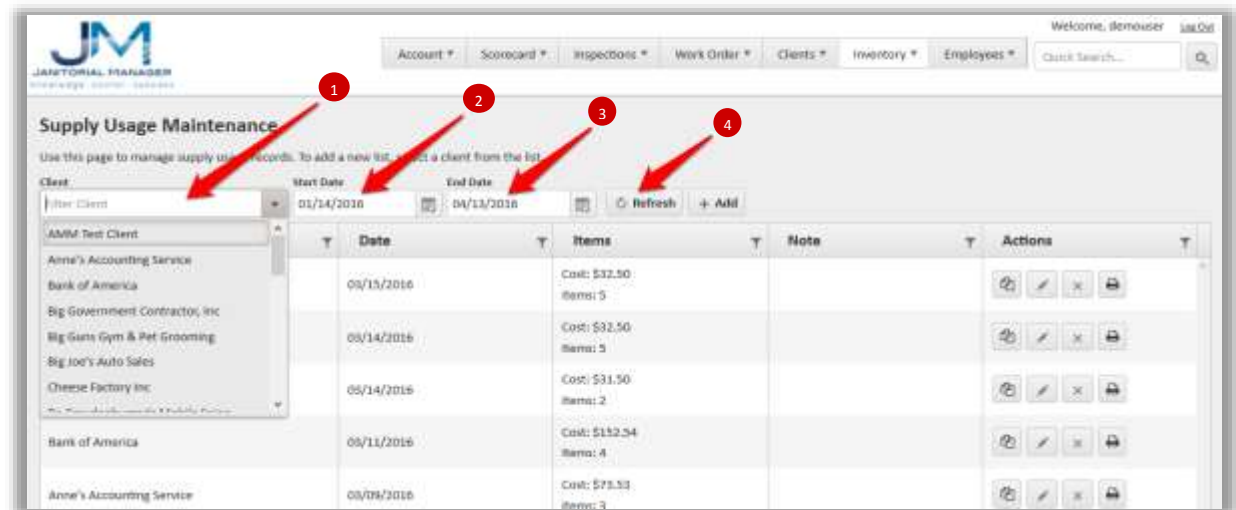


Figure 213

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

Inspections

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

Areas & Steps

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

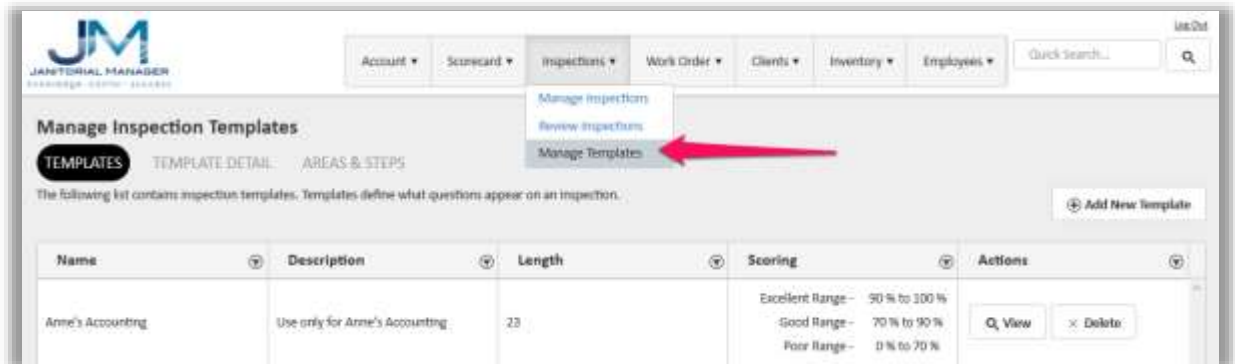


Figure 214

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

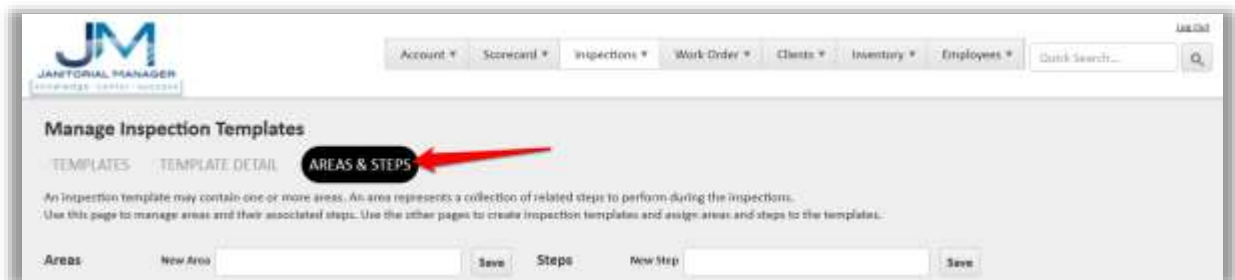


Figure 215

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

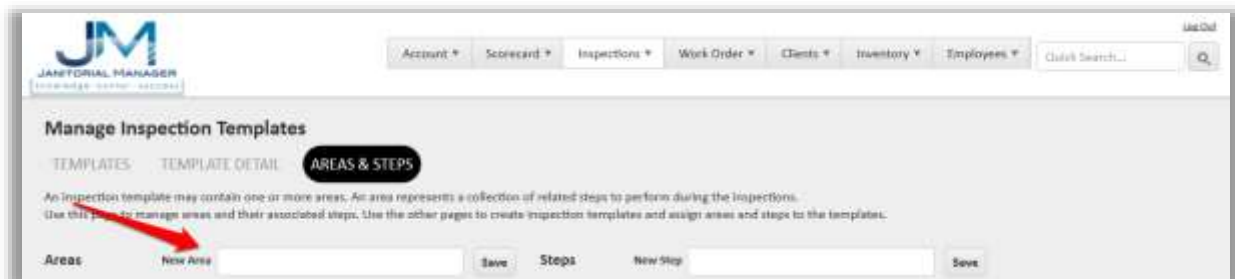


Figure 216

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

Manage Inspection Templates

TEMPLATES | TEMPLATE DETAIL | **AREAS & STEPS**

An inspection template may contain one or more areas. An area represents a collection of related steps to perform during the inspections. Use this page to manage areas and their associated steps. Use the other pages to create inspection templates and assign areas and steps to the templates.

Areas New Area: Save

Name	Steps	Actions
Lobby	5	▲ ▼ ✕ Copy
Office	7	▲ ▼ ✕ Copy
Bathroom	6	▲ ▼ ✕ Copy

Steps New Step: Save

Name	Actions
Sinks	▲ ▼ ✕
Counter	▲ ▼ ✕
Toilets	▲ ▼ ✕

Figure 217

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

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

Manage Inspection Templates

TEMPLATES | TEMPLATE DETAIL | **AREAS & STEPS**

An inspection template may contain one or more areas. An area represents a collection of related steps to perform during the inspections. Use this page to manage areas and their associated steps. Use the other pages to create inspection templates and assign areas and steps to the templates.

Areas New Area: Save

Name	Steps	Actions
Lobby	5	▲ ▼ ✕ Copy
Office	7	▲ ▼ ✕ Copy
Bathroom	6	▲ ▼ ✕ Copy

Steps New Step: Save

Name	Actions
Sinks	▲ ▼ ✕
Counter	▲ ▼ ✕
Toilets	▲ ▼ ✕

Figure 218

Create a New Inspection Template

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

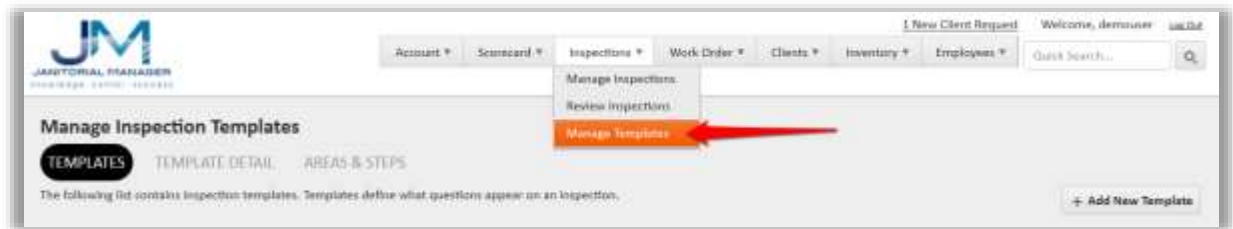


Figure 219

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

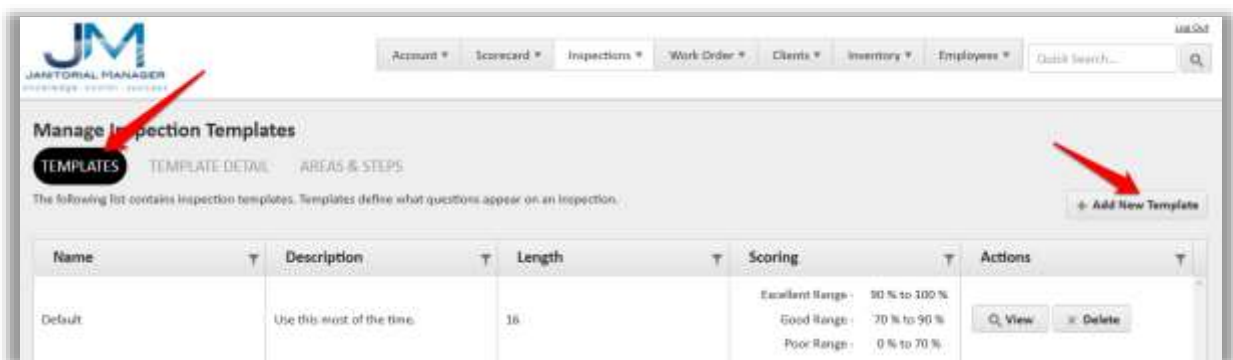


Figure 220

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



Figure 221

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

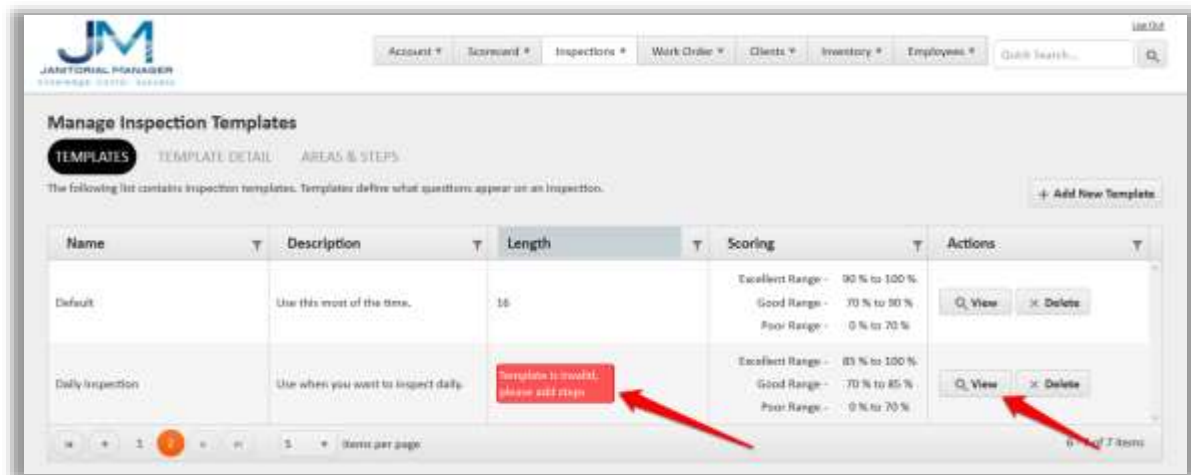


Figure 222

You will see the Template Detail page.

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

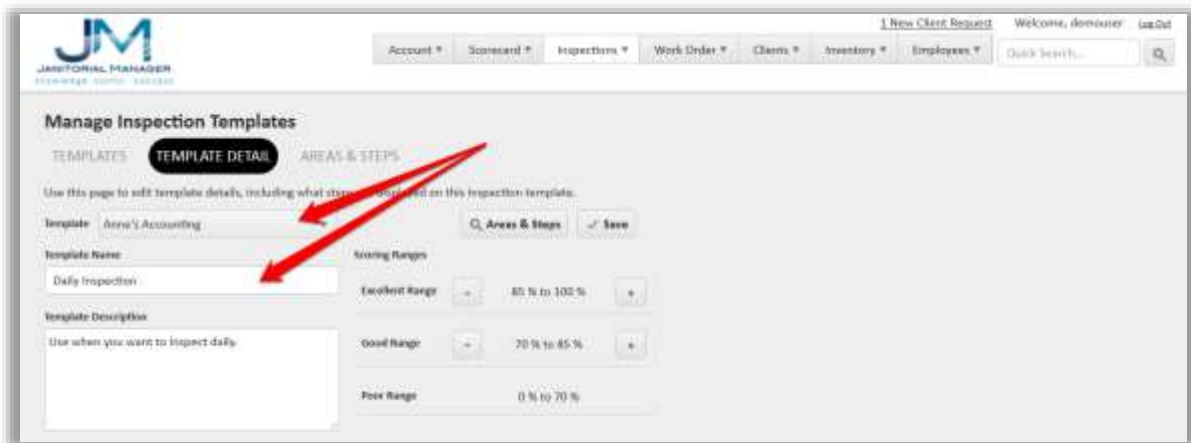


Figure 223

Click on the Areas & Steps button.



Figure 224

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

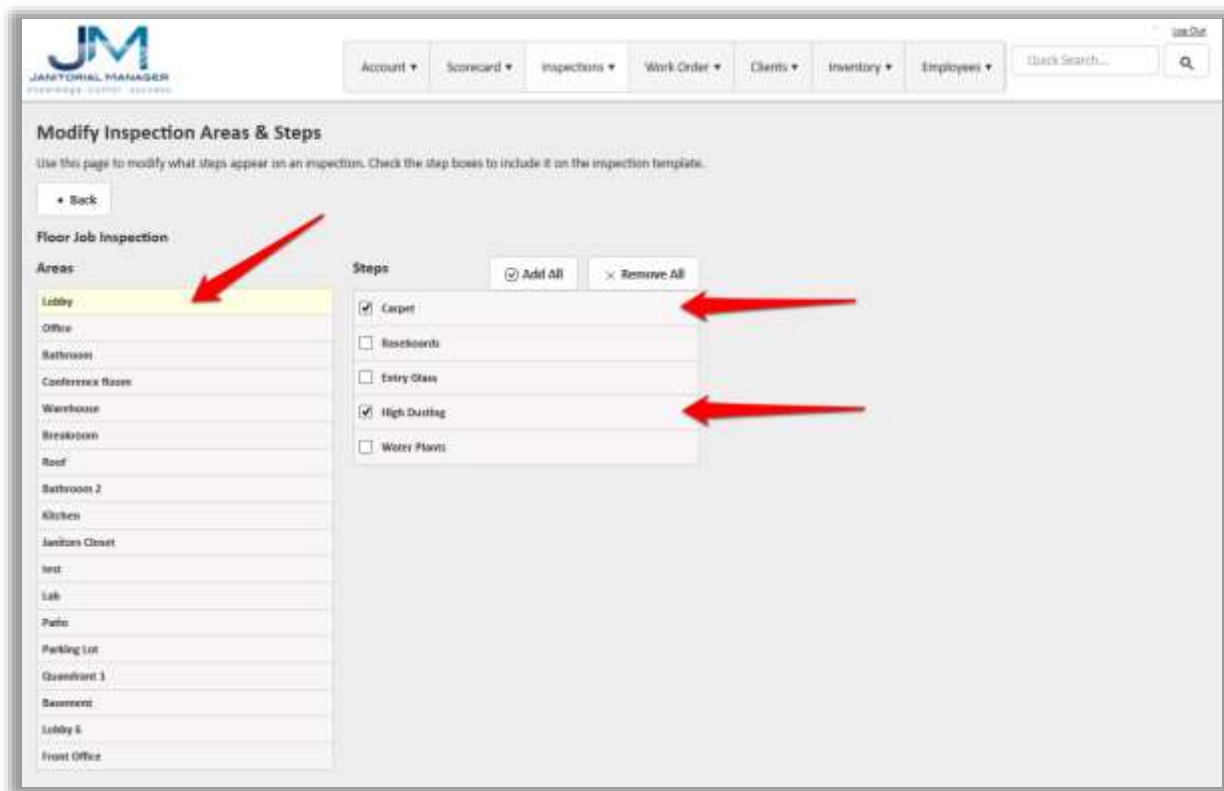


Figure 225

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

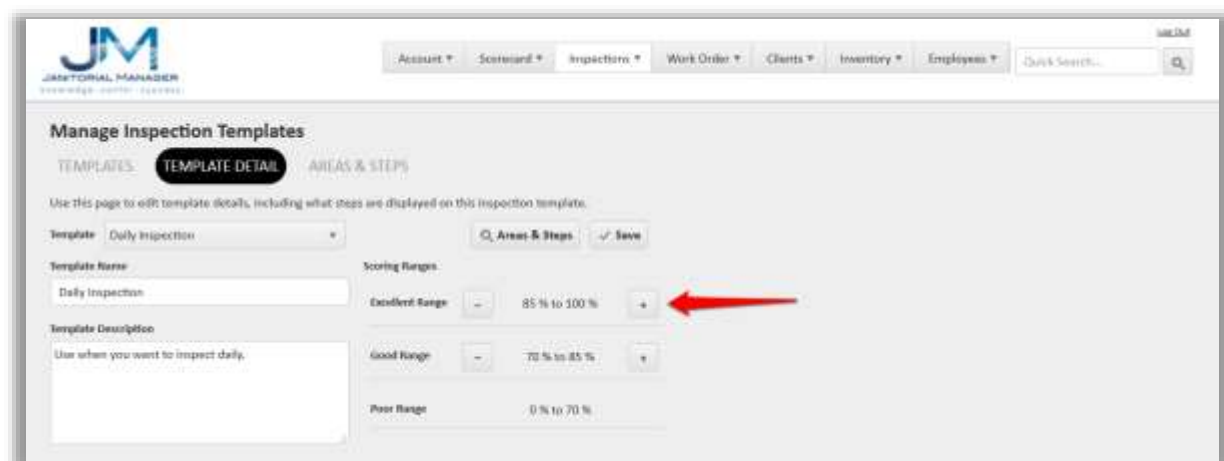


Figure 226

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

The screenshot shows the 'Manage Inspection Templates' interface. The 'TEMPLATE DETAIL' tab is selected. The 'Template' dropdown is set to 'Daily Inspection'. The 'Save' button is highlighted with a red arrow. The 'Template Name' is 'Daily Inspection' and the 'Template Description' is 'Use when you want to inspect daily.'. The 'Scoring Ranges' section shows three ranges: 'Excellent Range' (85 % to 100 %), 'Good Range' (70 % to 85 %), and 'Poor Range' (0 % to 70 %).

Figure 227

Schedule Recurring Inspections

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

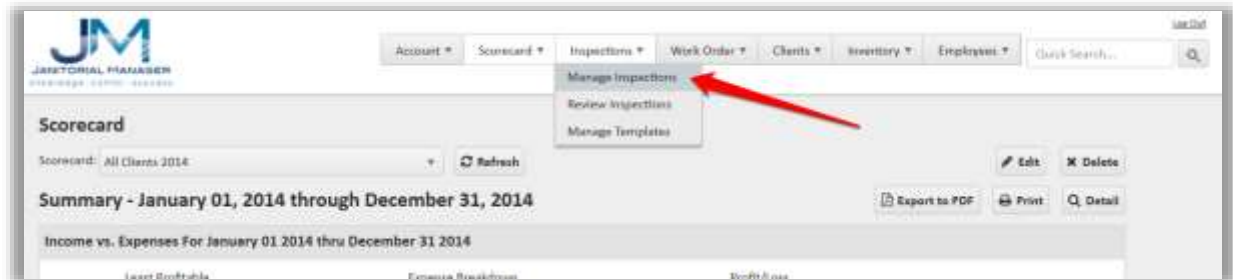


Figure 228

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

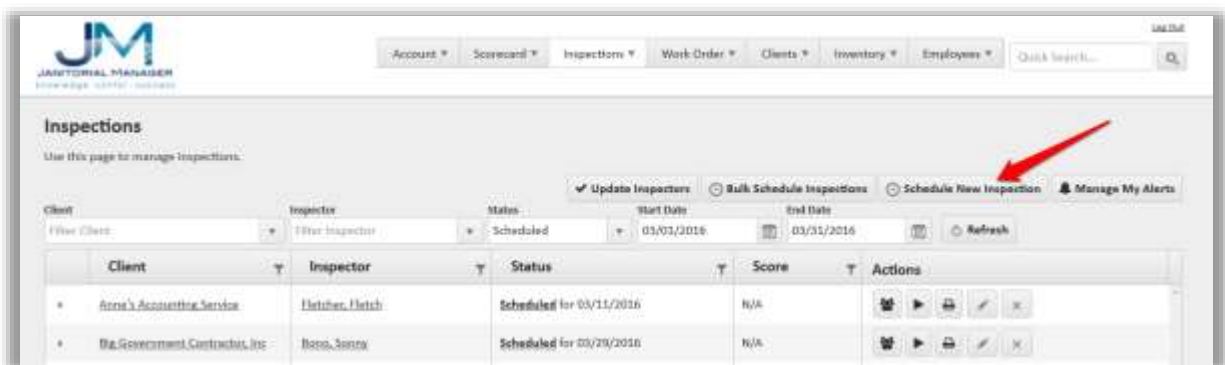


Figure 229

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



Figure 230

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



Bulk Schedule Inspections
Use this page to schedule hundreds of inspections with just a few clicks. Do not use this page to schedule a single inspection.

[Back](#)

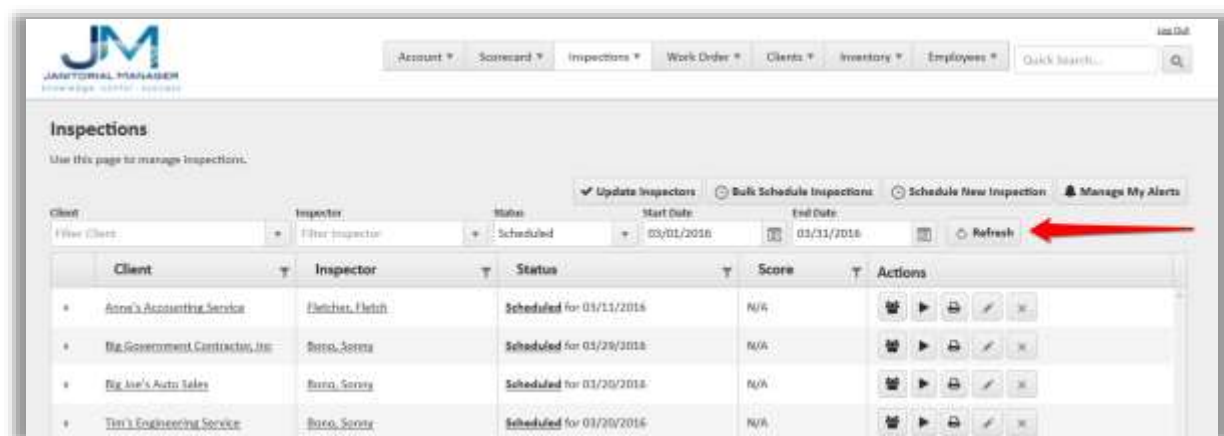
Client
Specific Client ⌵ ⓘ This function will schedule inspections for all active clients who require a monthly inspection if left blank.

Inspector
Select Inspector ⌵ ⓘ

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.



JM JUNCTIONAL MANAGER
knowledge central success

Account ▾ Scorecard ▾ Inspections ▾ Work Order ▾ Clients ▾ Inventory ▾ Employees ▾ Quick Search... 🔍

Inspections
Use this page to manage inspections.

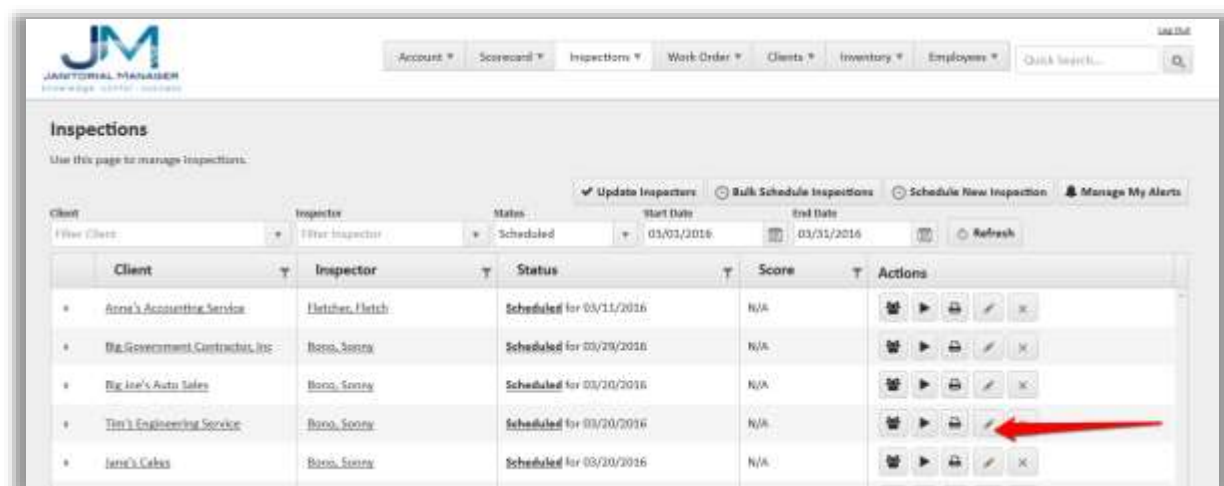
✓ Update Inspections ⌵ Bulk Schedule Inspections ⌵ Schedule New Inspection ⌵ Manage My Alerts

Client: Filter Client ⌵ Inspector: Filter Inspector ⌵ Status: Scheduled ▾ Start Date: 03/01/2016 End Date: 03/31/2016 Refresh

Client	Inspector	Status	Score	Actions
Anna's Accounting Service	Fletcher, Fletcher	Scheduled for 03/11/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵
Big Government Contractors, Inc.	Bono, Sonny	Scheduled for 03/29/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵
Big Joe's Auto Sales	Bono, Sonny	Scheduled for 03/20/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵
Tin's Engineering Service	Bono, Sonny	Scheduled for 03/20/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵

Figure 232

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



JM JUNCTIONAL MANAGER
knowledge central success

Account ▾ Scorecard ▾ Inspections ▾ Work Order ▾ Clients ▾ Inventory ▾ Employees ▾ Quick Search... 🔍

Inspections
Use this page to manage inspections.

✓ Update Inspections ⌵ Bulk Schedule Inspections ⌵ Schedule New Inspection ⌵ Manage My Alerts

Client: Filter Client ⌵ Inspector: Filter Inspector ⌵ Status: Scheduled ▾ Start Date: 03/03/2016 End Date: 03/31/2016 Refresh

Client	Inspector	Status	Score	Actions
Anna's Accounting Service	Fletcher, Fletcher	Scheduled for 03/11/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵
Big Government Contractors, Inc.	Bono, Sonny	Scheduled for 03/29/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵
Big Joe's Auto Sales	Bono, Sonny	Scheduled for 03/20/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵
Tin's Engineering Service	Bono, Sonny	Scheduled for 03/20/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵
Jane's Cakes	Bono, Sonny	Scheduled for 03/20/2016	N/A	⌵ ▶ ⌵ ⌵ ⌵

Figure 233

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

JM JANITORIAL MANAGER

Account * Scorecard * **Inspections *** Work Order * Clients * Inventory * Employees * Quick Search...

Schedule Inspection

Fill out the required fields to schedule an inspection. The inspection can be performed at any point after scheduled.

[← Back](#)

Client
Tim's Engineering Service

Inspector
Bono, Sonny

Template
Detailed

Type
Monthly

Scheduled Date
March 20, 2016

Overall Notes

☐ Save

Bolded fields are required.

Figure 234

Change Inspectors

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

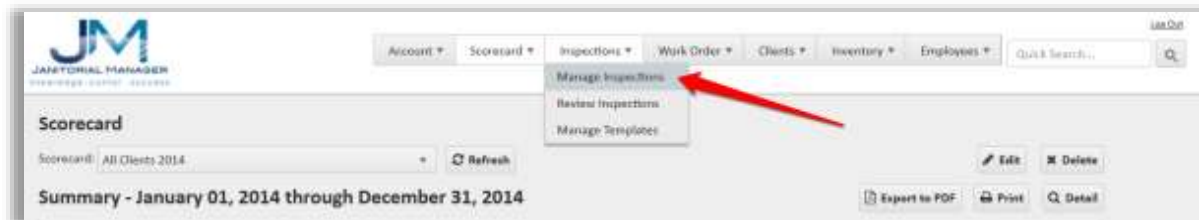


Figure 235

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

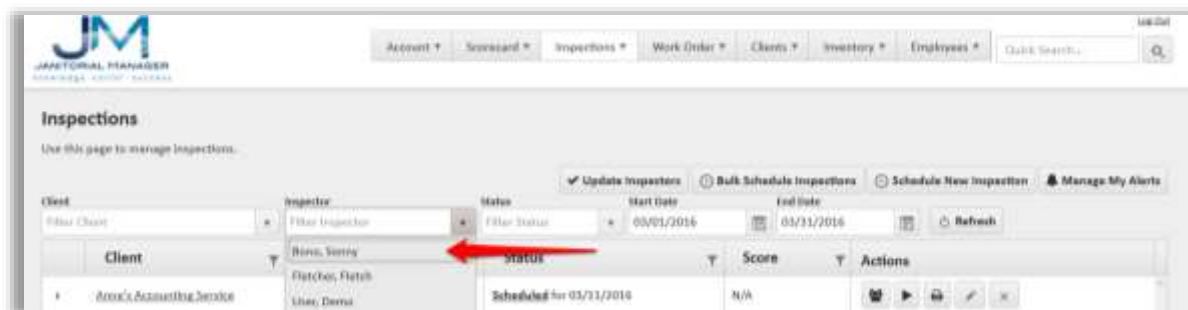


Figure 236

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

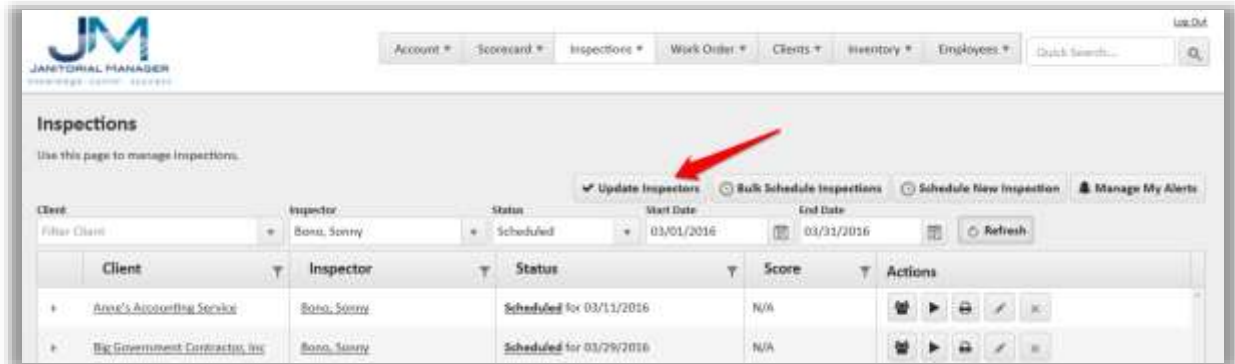


Figure 237

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

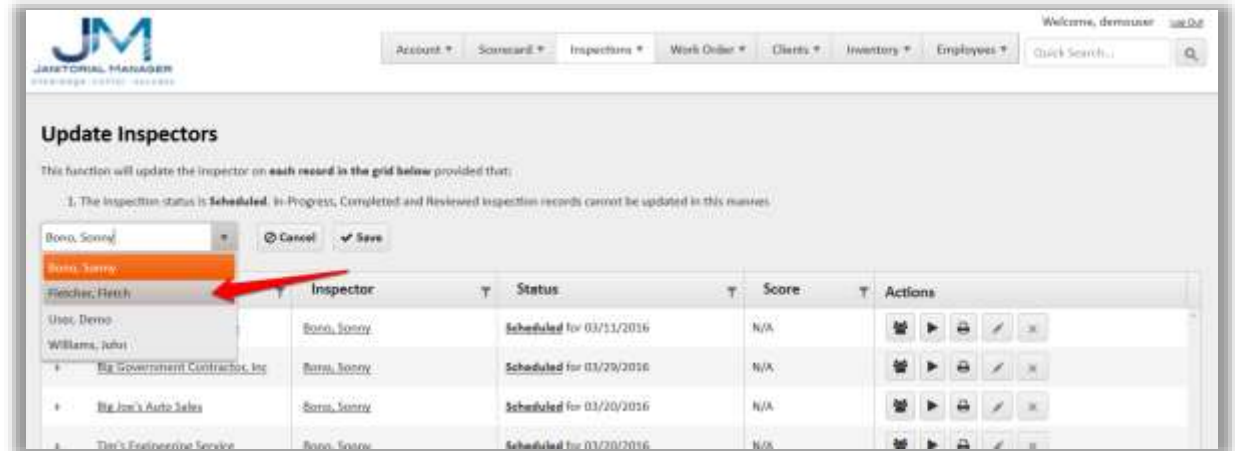


Figure 238

Set an Inspection Alert

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

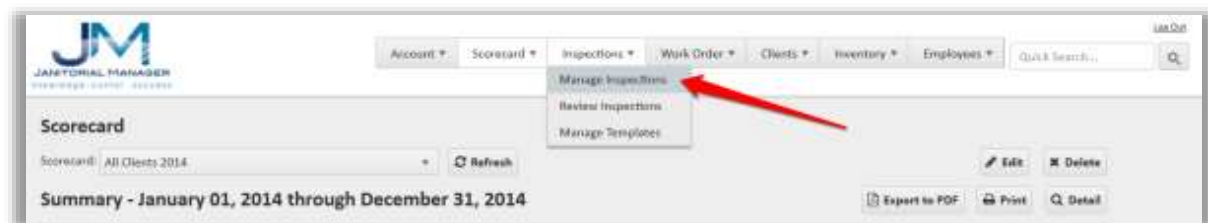


Figure 239

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

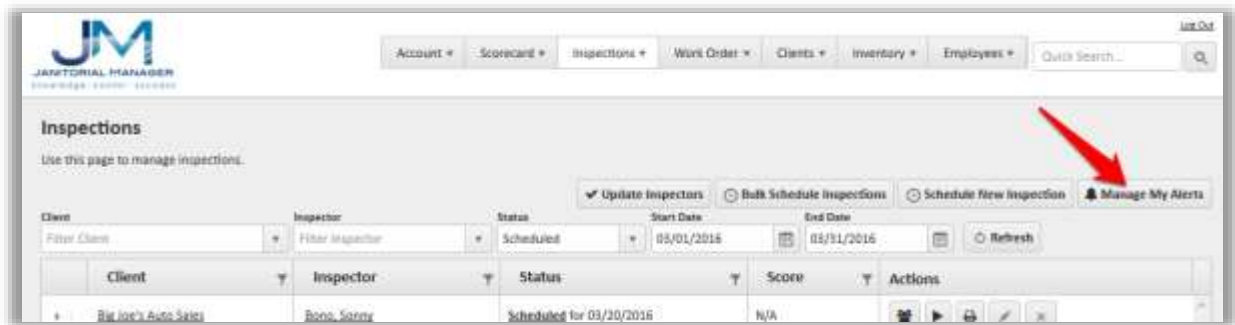


Figure 240

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

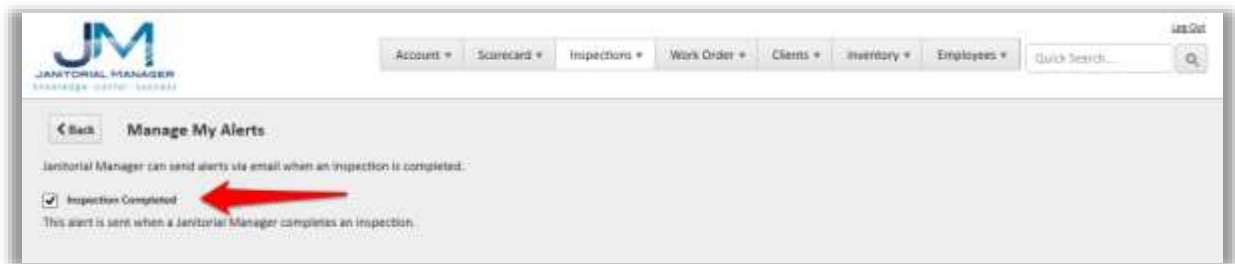


Figure 241

Conduct Inspections

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

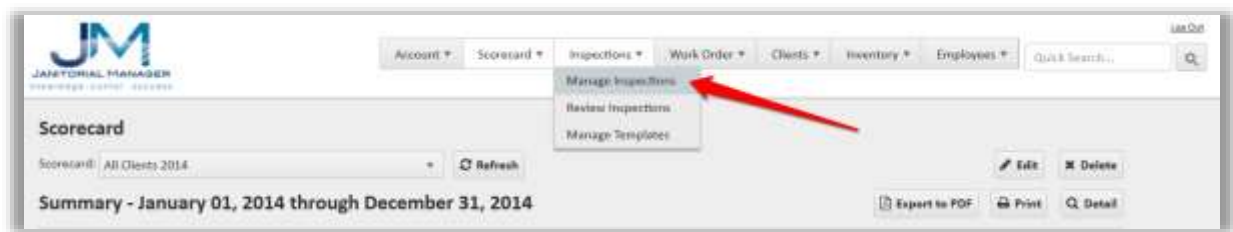


Figure 242

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

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

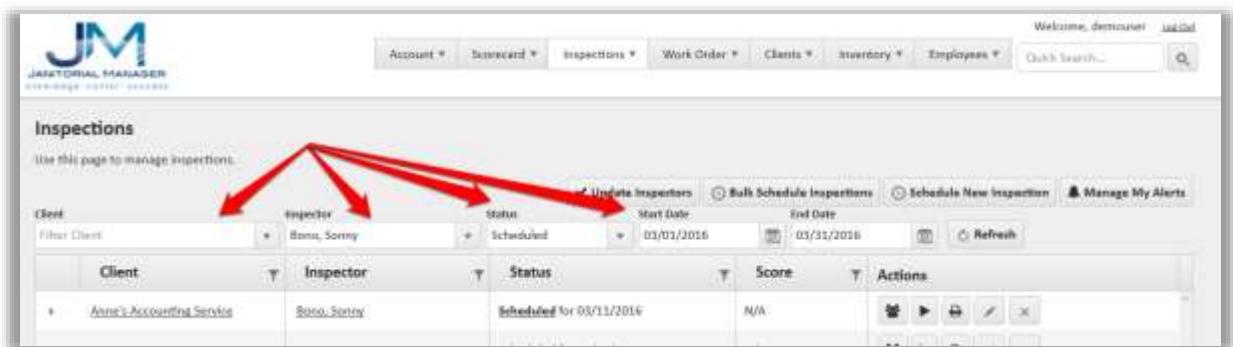


Figure 243

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

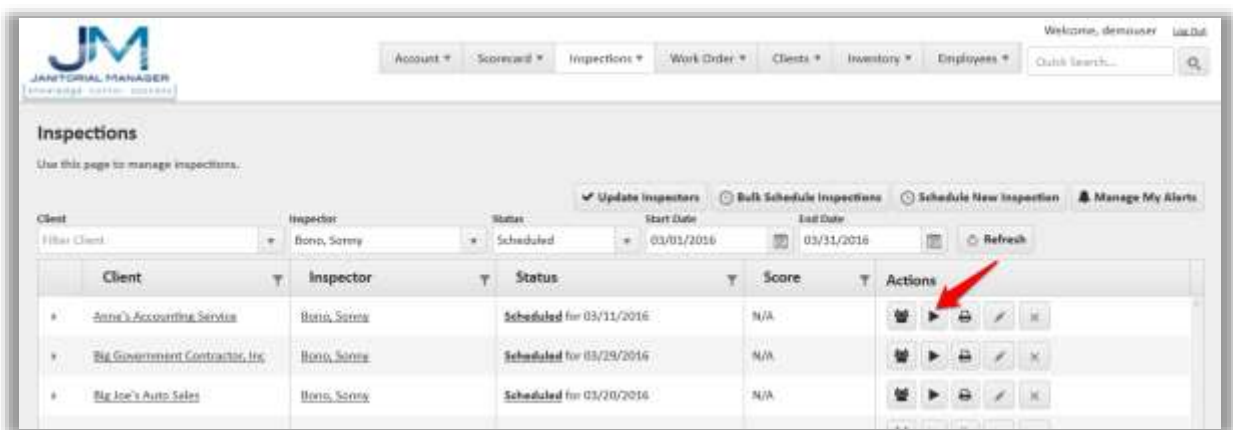


Figure 244

The Inspection Template will be displayed.

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

Perform Inspection

Expand each area listed below and provide answers for every step. Your answers are saved as you progress, so don't worry about saving.

← Back This inspection has not been started. Please complete the steps below. Print

Anne's Accounting Service Monthly Inspection Summary

Area	Excellent	Good	Poor	Skipped	Unknown	Area Score	Complete
Office	0	0	0	0	4	0 %	0 %
Conference Room	0	0	0	0	2	0 %	0 %

Buttons: Clear Area Answers, View Steps

Figure 245

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

Bathroom

Step	Excellent	Good	Poor	Skipped
Counter				
Sinks				
Toilets				

Buttons: Clear Area Answers, Hide Steps

Figure 246

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

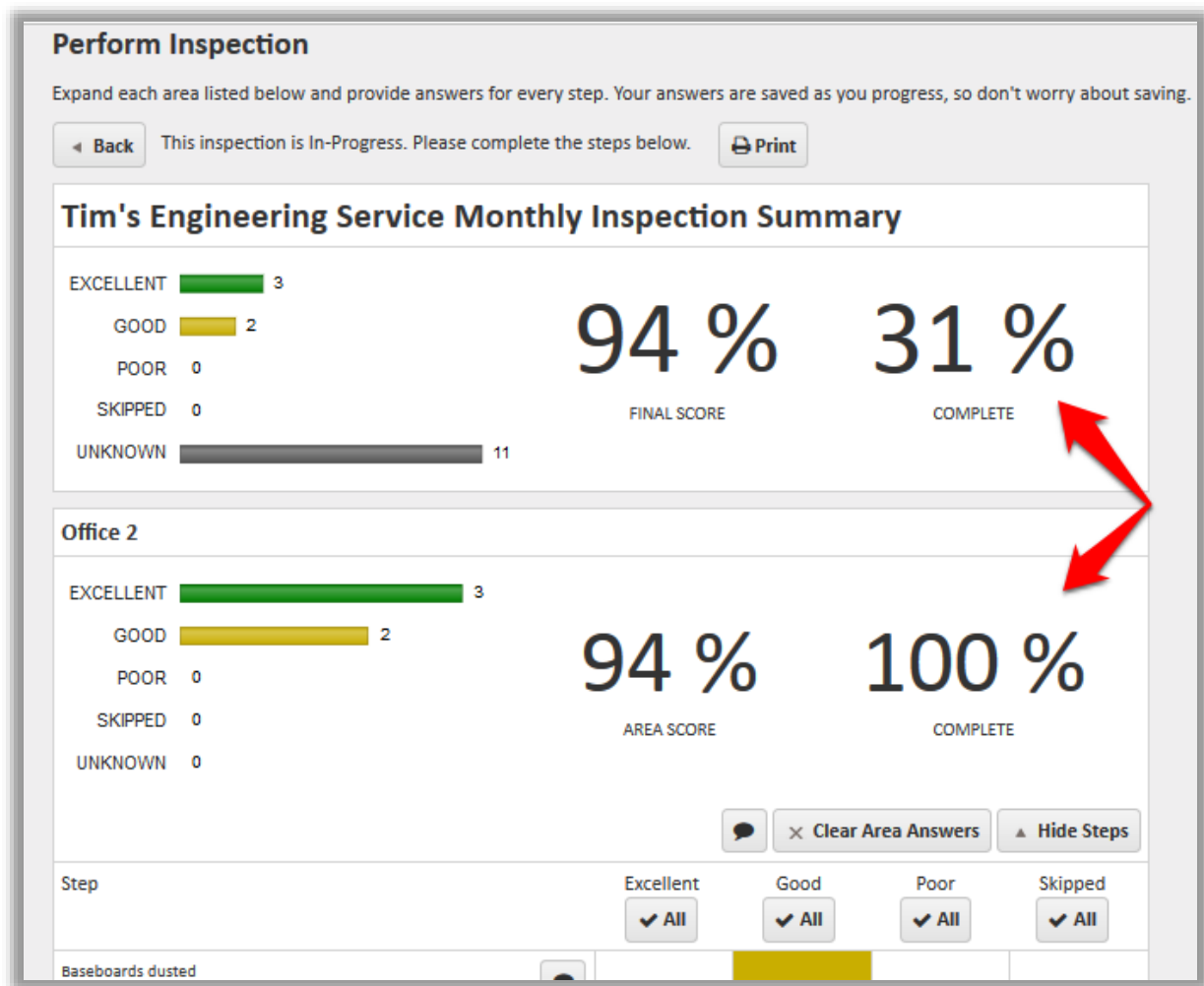


Figure 247

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

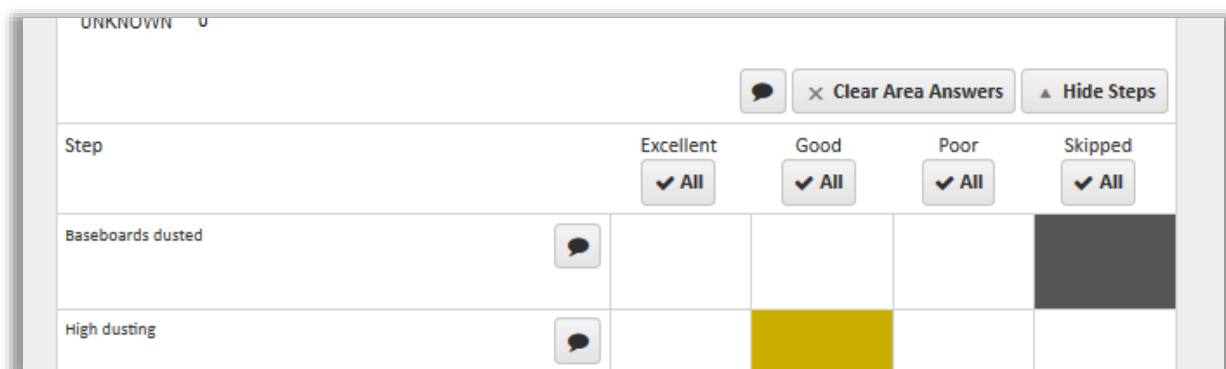


Figure 248

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

Perform Inspection

Expand each area listed below and provide answers for every step. Your answers are saved as you progress, so don't worry about saving.

◀ Back
This inspection is In-Progress. Please complete the steps below.
Print

Tim's Engineering Service Monthly Inspection Summary

EXCELLENT	0	<div>85 %</div> <div>FINAL SCORE</div>	<div>31 %</div> <div>COMPLETE</div>
GOOD	5		
POOR	0		
SKIPPED	0		
UNKNOWN			

Office 2

EXCELLENT	0	<div>85 %</div> <div>AREA SCORE</div>	<div>100 %</div> <div>COMPLETE</div>
GOOD	5		
POOR	0		
SKIPPED	0		
UNKNOWN	0		

Clear Area Answers
Hide Steps

Step		Excellent	Good	Poor	Skipped
		✓ All	✓ All	✓ All	✓ All
Baseboards dusted					
High dusting					
Trash cans emptied					
Blinds cleaned					
Carpet vacuumed					

Figure 249

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

UNKNOWN 11

Office 2

EXCELLENT 3
GOOD 2
POOR 0
SKIPPED 0
UNKNOWN 0

94 % 100 %
AREA SCORE COMPLETE

× Clear Area Answers ▲ Hide Steps

Step	Excellent	Good	Poor	Skipped
	✓ All	✓ All	✓ All	✓ All
Baseboards dusted				
High dusting				

Figure 250

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

These notes will appear on the final inspection report.

Edit Step Note

The sinks are dirty.

× Clear ✓ Save

Figure 251

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

The screenshot shows the 'Perform Inspection' page in the JAM Manager application. The page header includes the JAM Manager logo and navigation tabs: Account, Scorecard, Inspections, Work Order, Clients, Inventory, and Employees. A search bar is also present. The main content area is titled 'Perform Inspection' and includes a message: 'Expand each area listed below and provide answers for every step. Your answers are saved as you progress, so don't worry about saving.' Below this, there is a 'Back' button and a 'Complete Inspection' button. A red arrow points to the 'Complete Inspection' button. The page also displays a 'Big Government Contractor, Inc Monthly Inspection Summary' with a progress bar showing 69% completion. Below the progress bar, there is a table with columns for 'Outing' and 'Conference Table'. The table shows a grid of colored squares (green, yellow, red) representing different inspection steps. A red arrow points to the 'Complete Inspection' button at the bottom of the page, with a 'Back To Top' link above it.

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**.

The screenshot shows the 'Complete Inspection' page in the JAM Manager application. The page header includes the JAM Manager logo and navigation tabs: Account, Scorecard, Inspections, Work Order, Clients, Inventory, and Employees. A search bar is also present. The main content area is titled 'Complete Inspection' and includes a message: 'Please provide the following information and click save to mark this inspection as complete.' Below this, there is a 'Back' button. The form contains the following fields: Client (Big Government Contractor, Inc), Inspector (Bono, Sonny), Type (Monthly), Scheduled Date (March 29, 2016), and Performed On Date (March 29, 2016). There is also a section for 'Overall Notes' with a text area. A red arrow points to the 'Save' button at the bottom of the form. Below the 'Save' button, there is a message: 'Bolded fields are required.'

Figure 253

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

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

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

Review Inspections

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

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

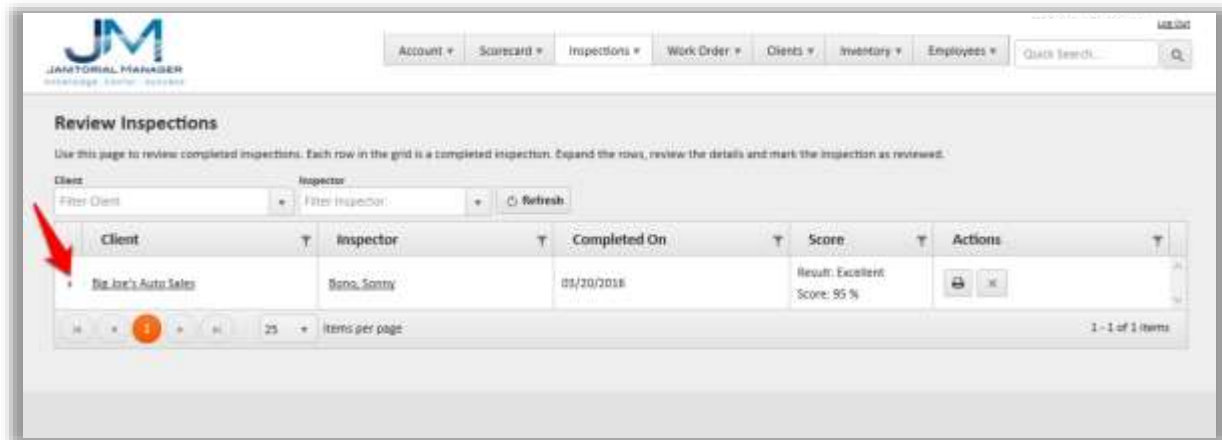


Figure 254

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

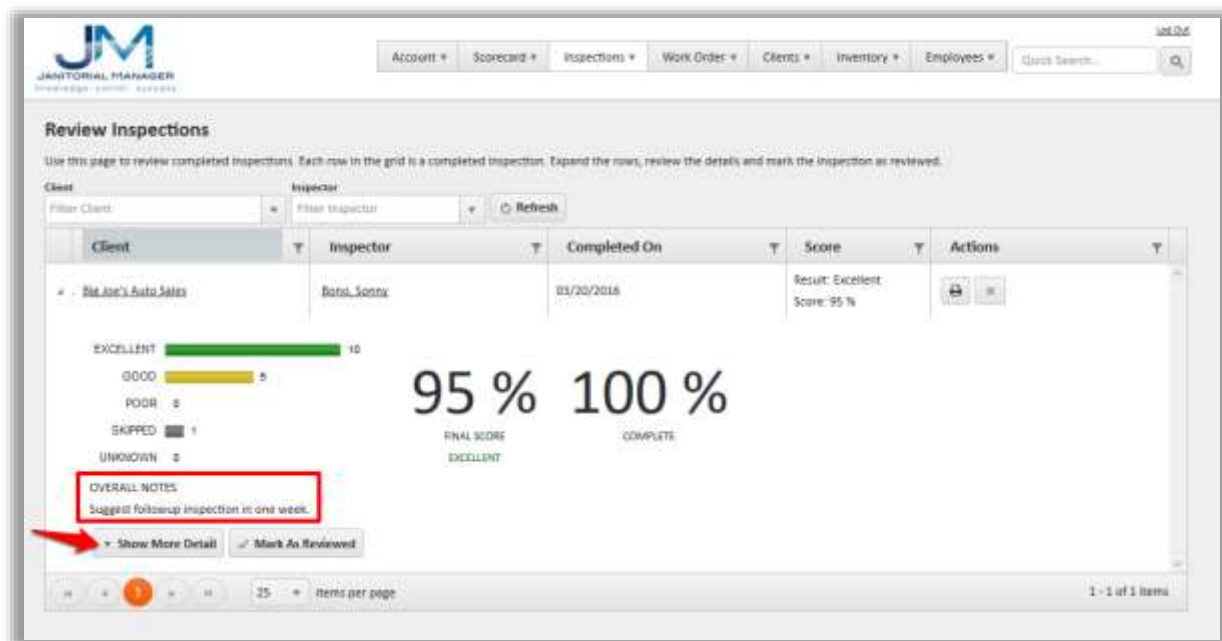


Figure 255

Click **Show More Detail** to review the

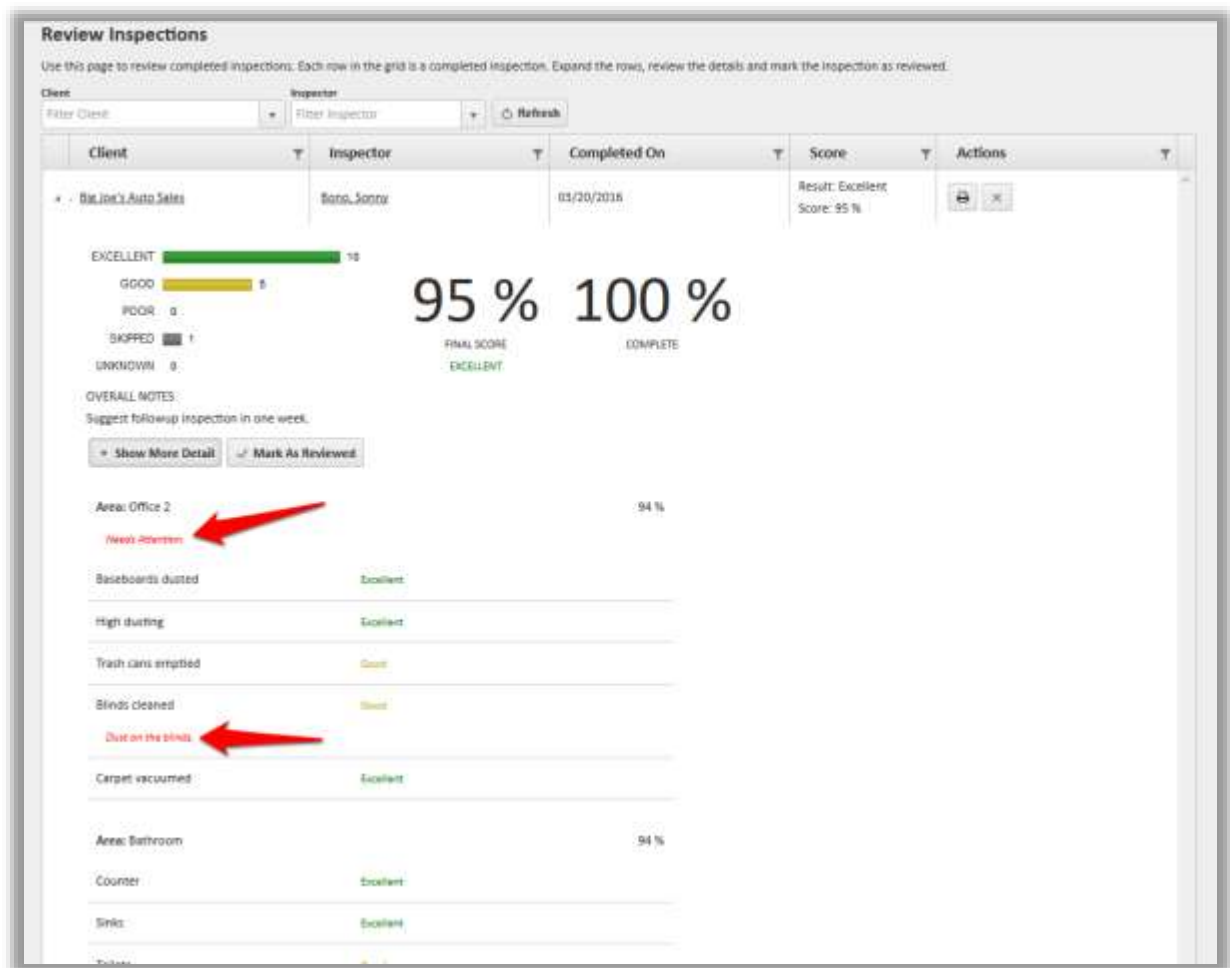


Figure 256

Segmentation

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

Create a Segment

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

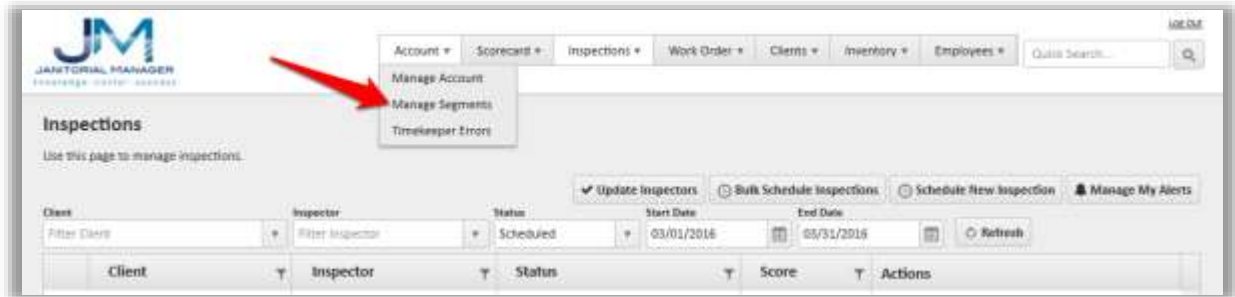


Figure 257

Click the **Add New Segment** button.

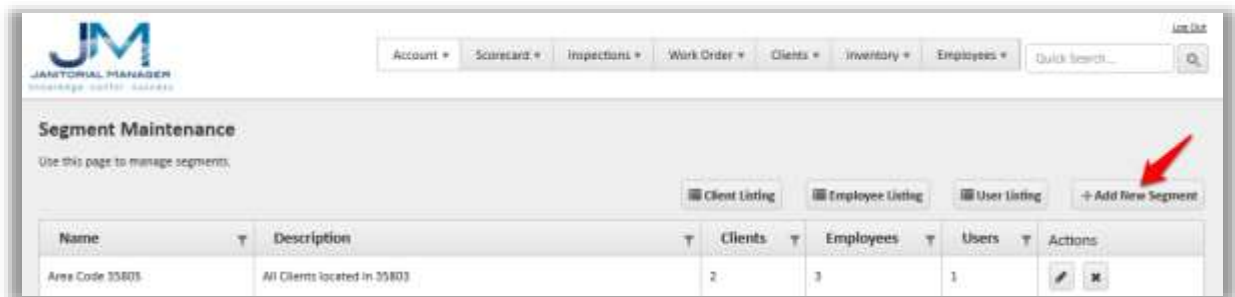


Figure 258

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

A screenshot of the 'Add New Segment' dialog box. It has a title bar with a close button (X). The dialog contains two input fields: 'Name' (required, indicated by an asterisk) and 'Description'. Below the input fields is a legend indicating that an asterisk (*) denotes a 'Required field'. At the bottom of the dialog are two buttons: 'Save' (with a checkmark icon) and 'Cancel' (with an X icon).

Figure 259

Delete a Segment

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

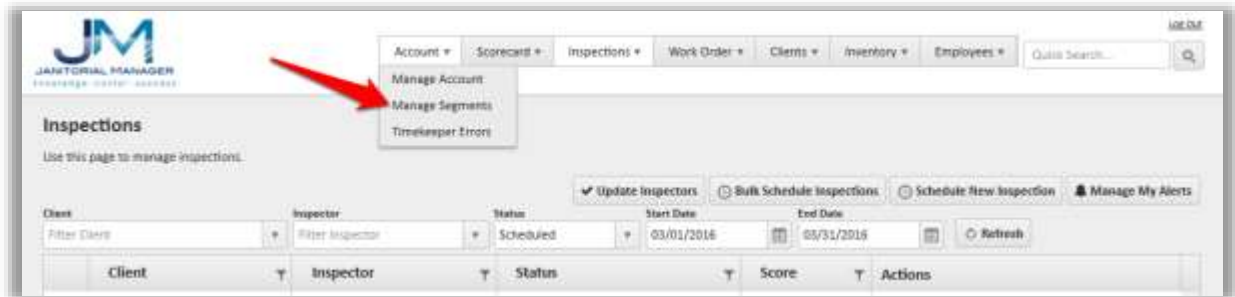


Figure 260

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

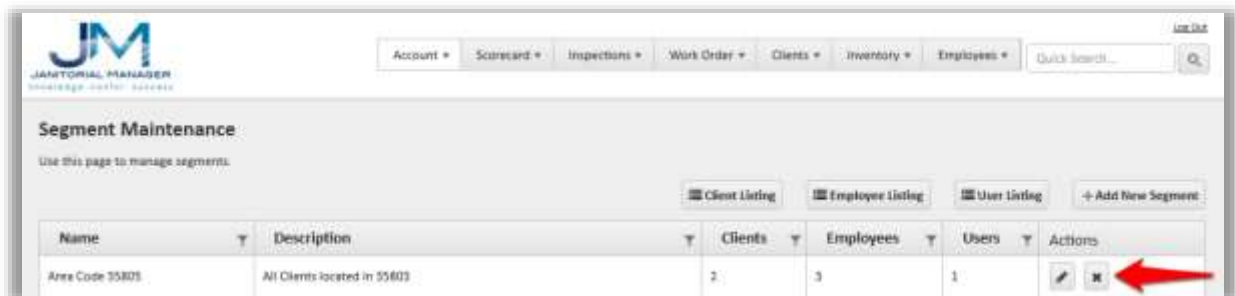


Figure 261

Add Clients to a Segment

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

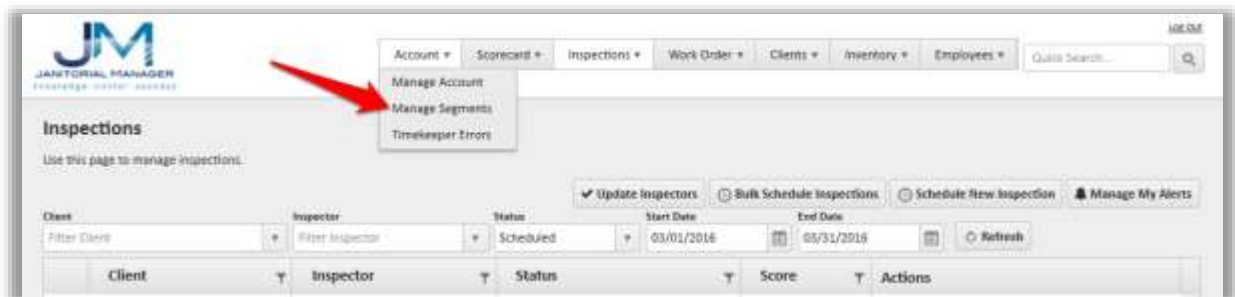


Figure 262

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

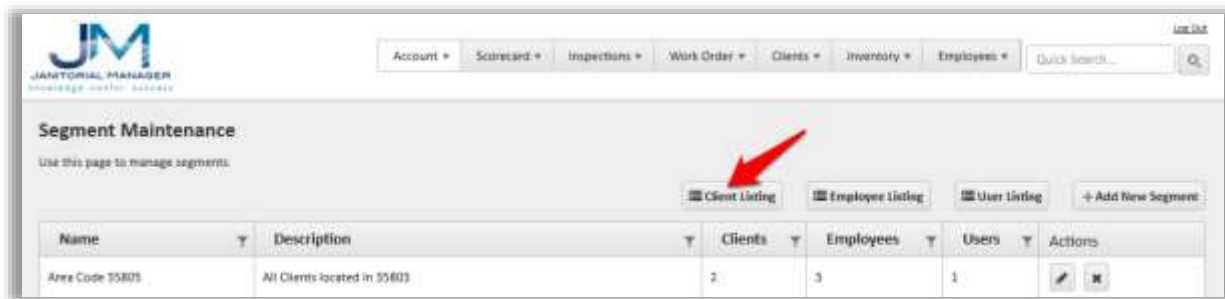


Figure 263

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

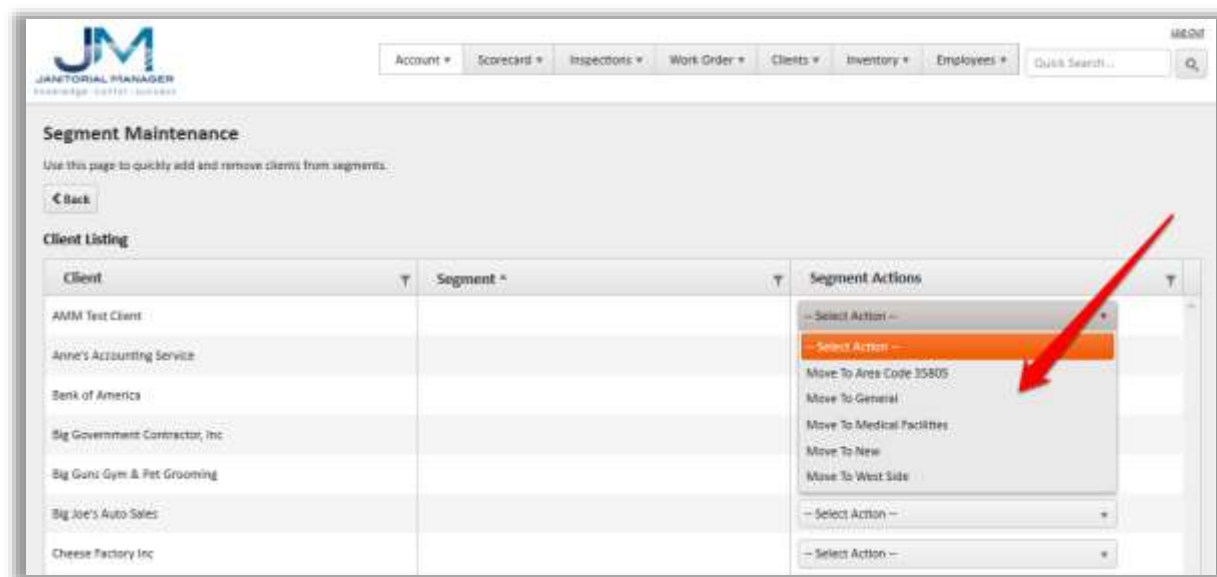


Figure 264

Remove a Client from a Segment

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

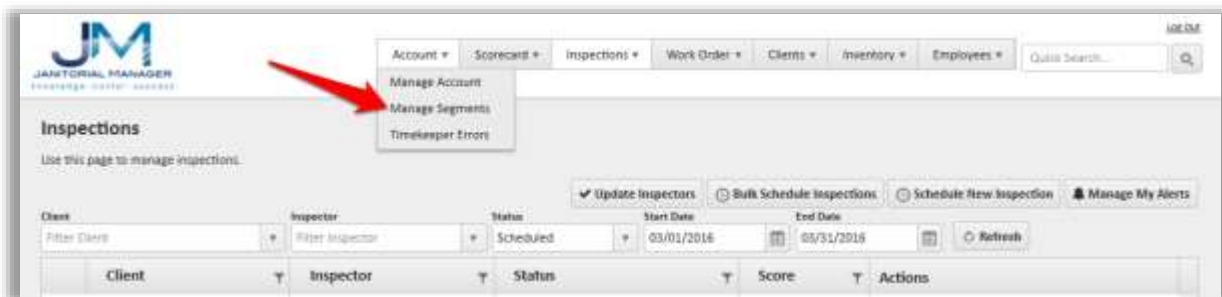


Figure 265

Select the **Client Listing** button.

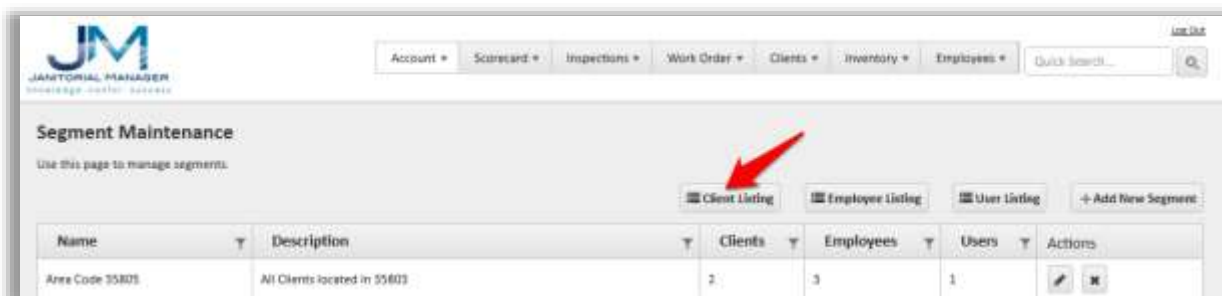


Figure 266

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

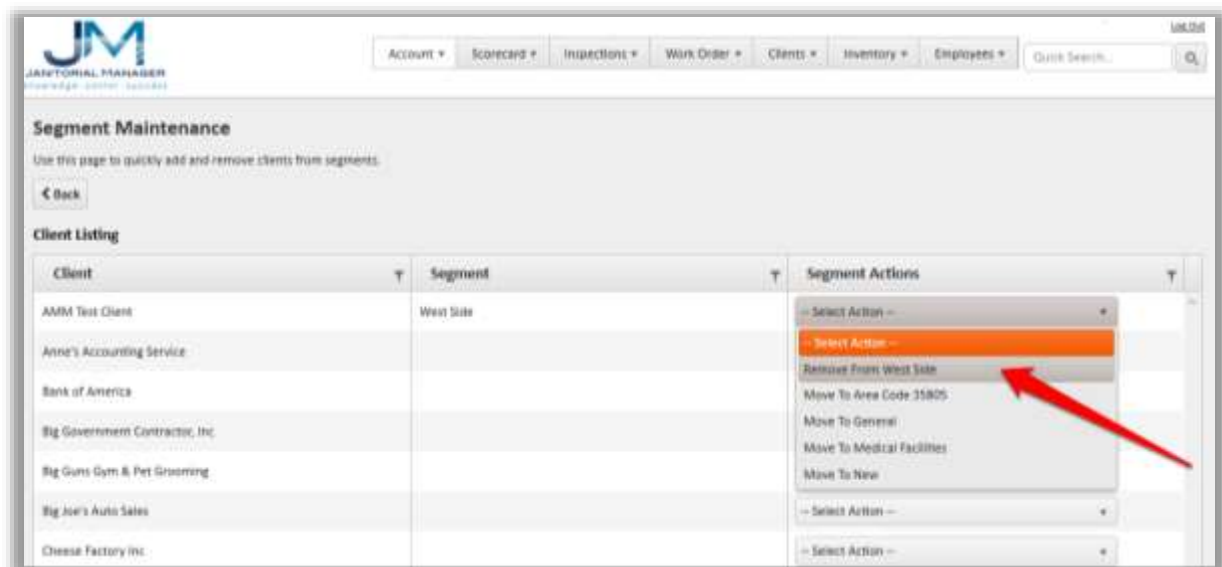


Figure 267

Add an Employee to a Segment

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

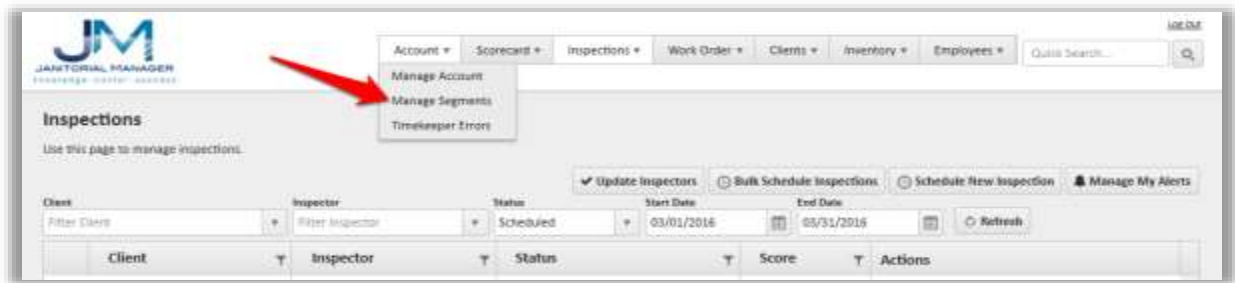


Figure 268

Select the **Employee Listing** button.

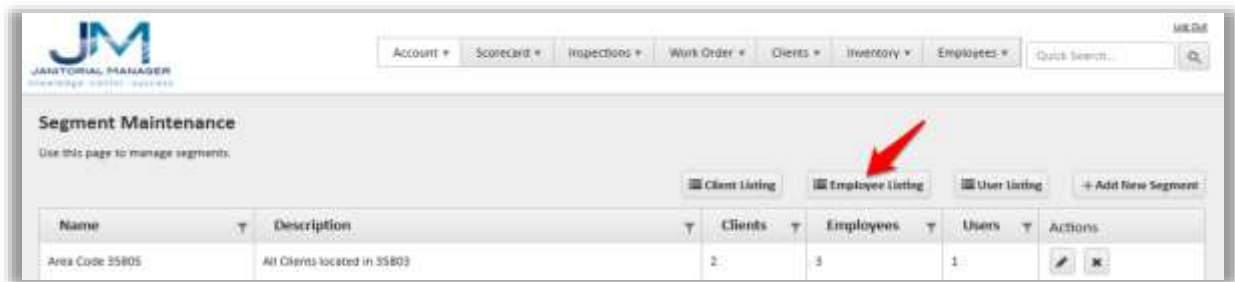


Figure 269

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

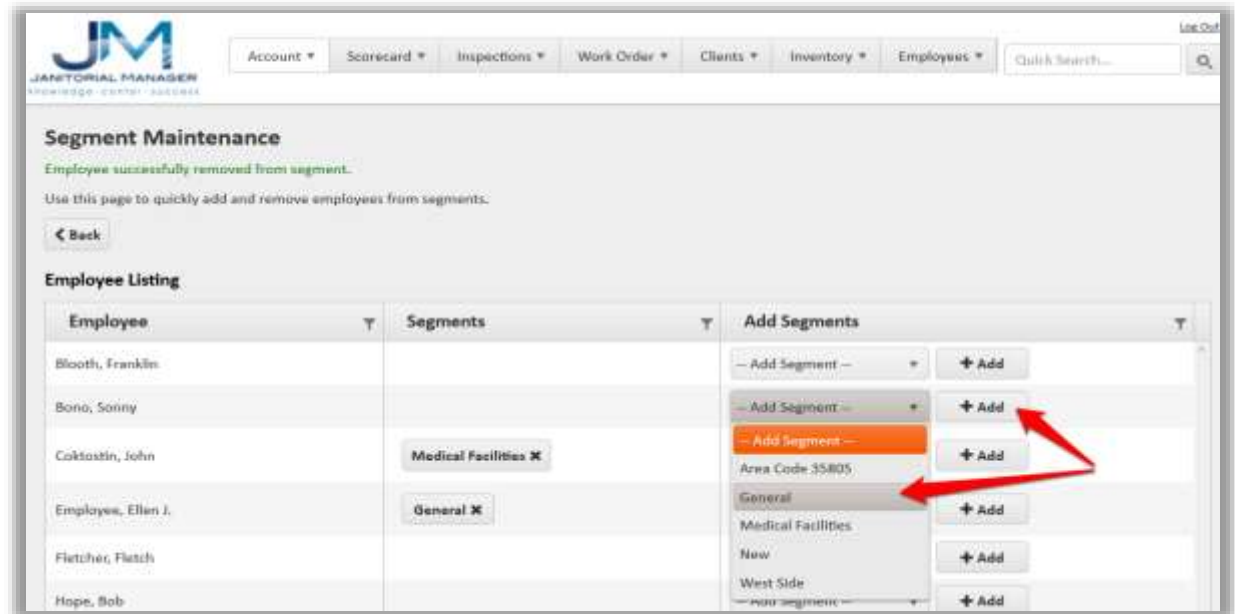


Figure 270

Remove an Employee from a Segment

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

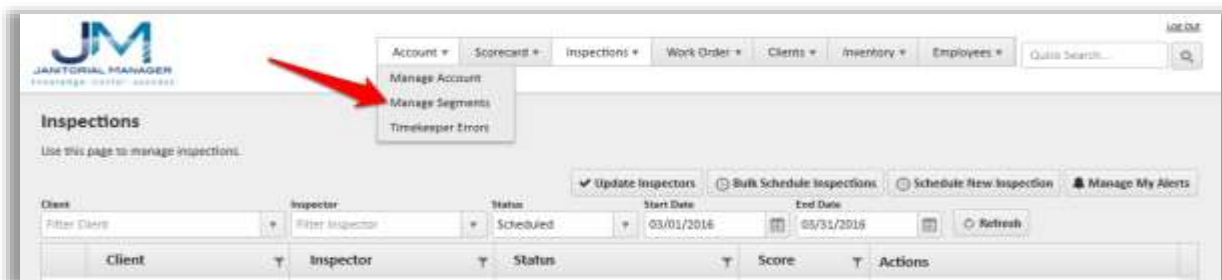


Figure 271

Select the **Employee Listing** button.

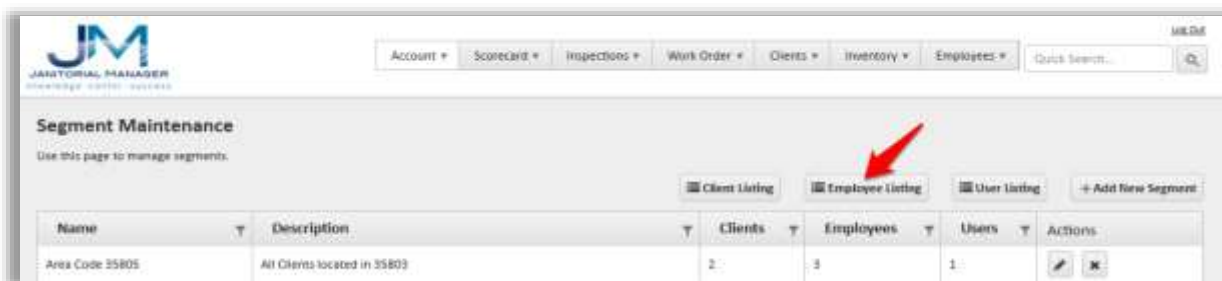


Figure 272

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

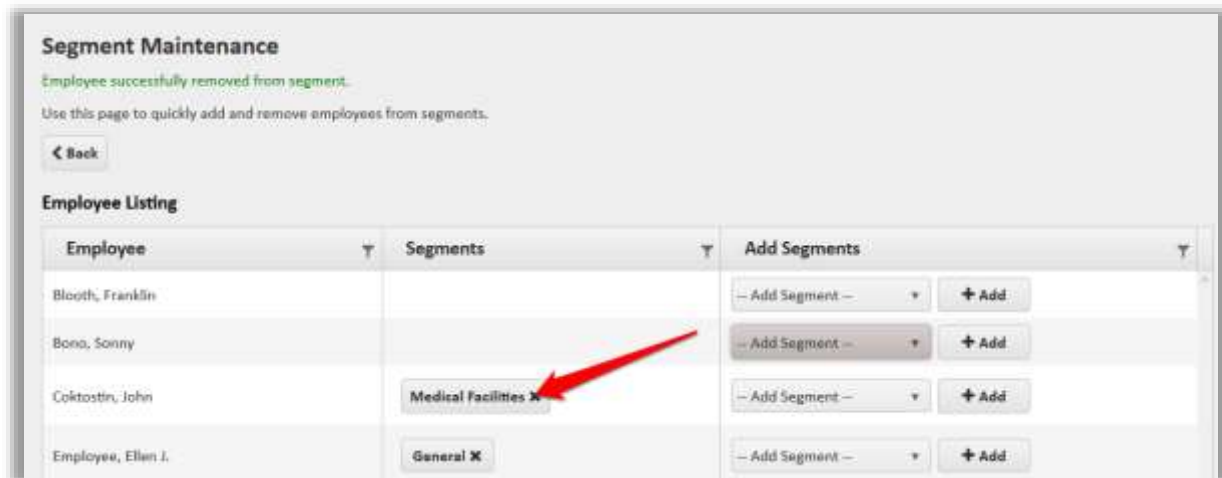


Figure 273

Add a User to a Segment

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

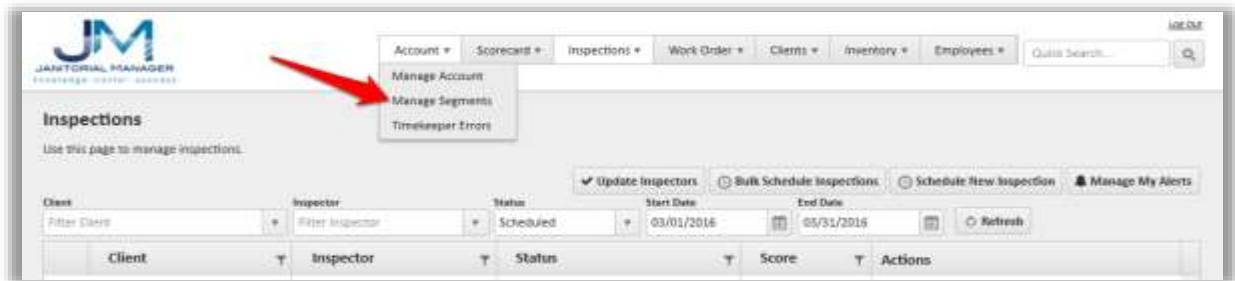


Figure 274

Select the **User Listing** button.

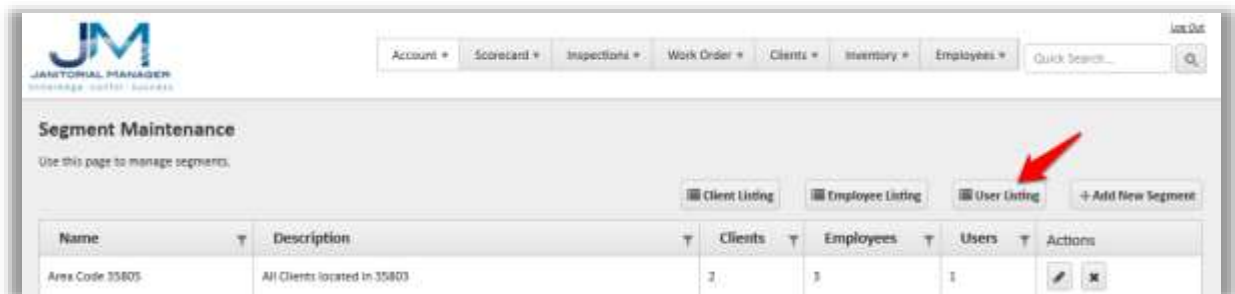


Figure 275

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

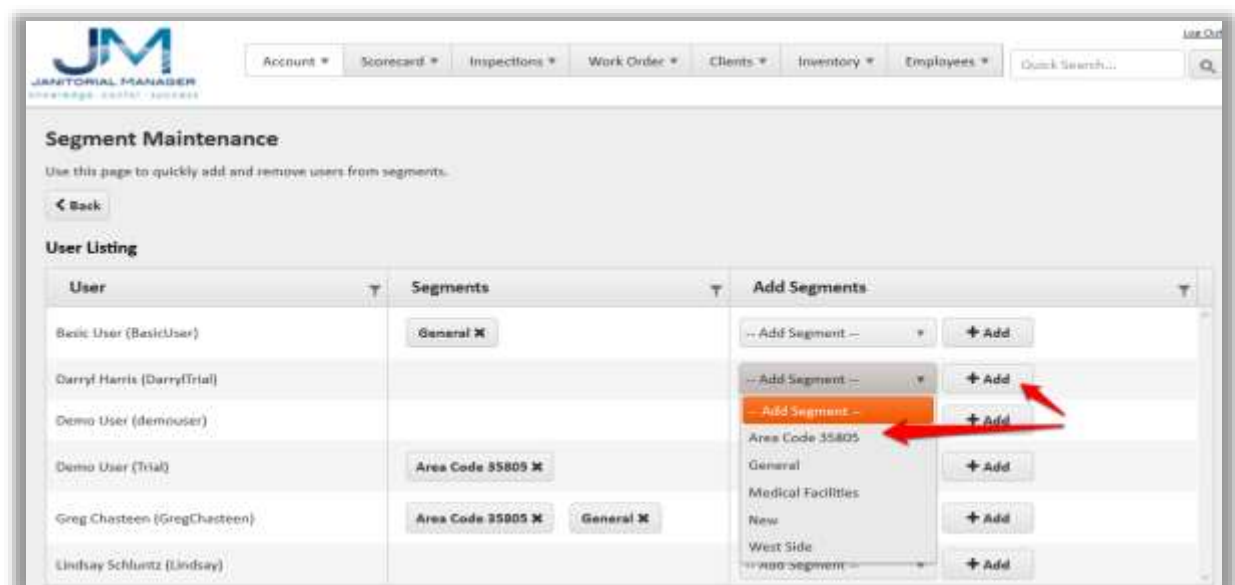


Figure 276

Remove a User from a Segment

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

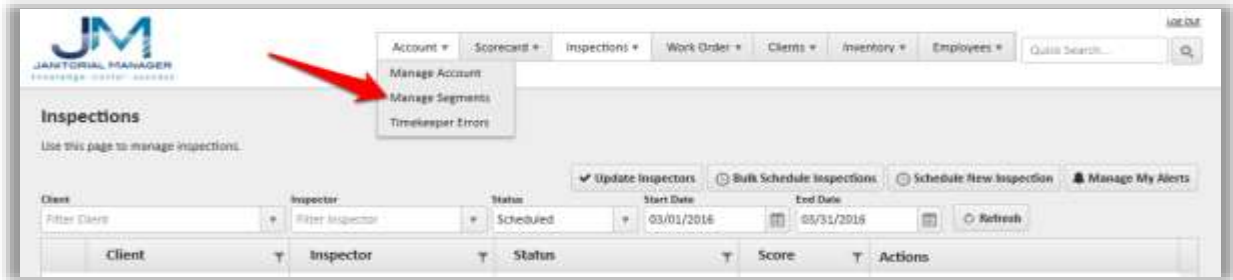


Figure 277

Select the **User Listing** button.

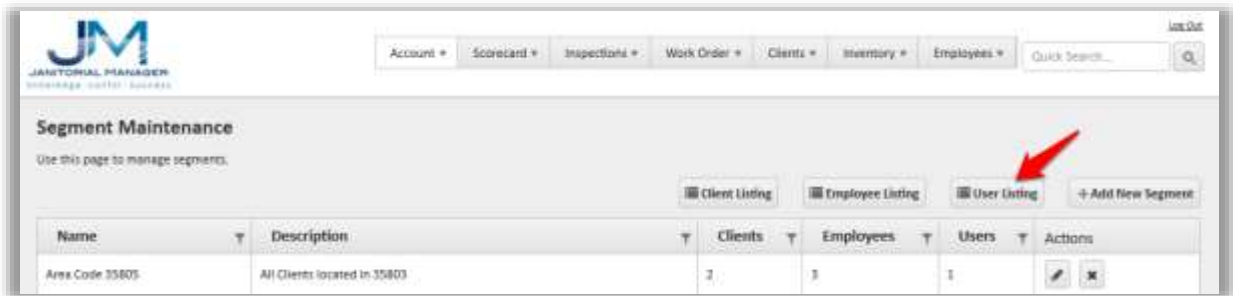


Figure 278

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

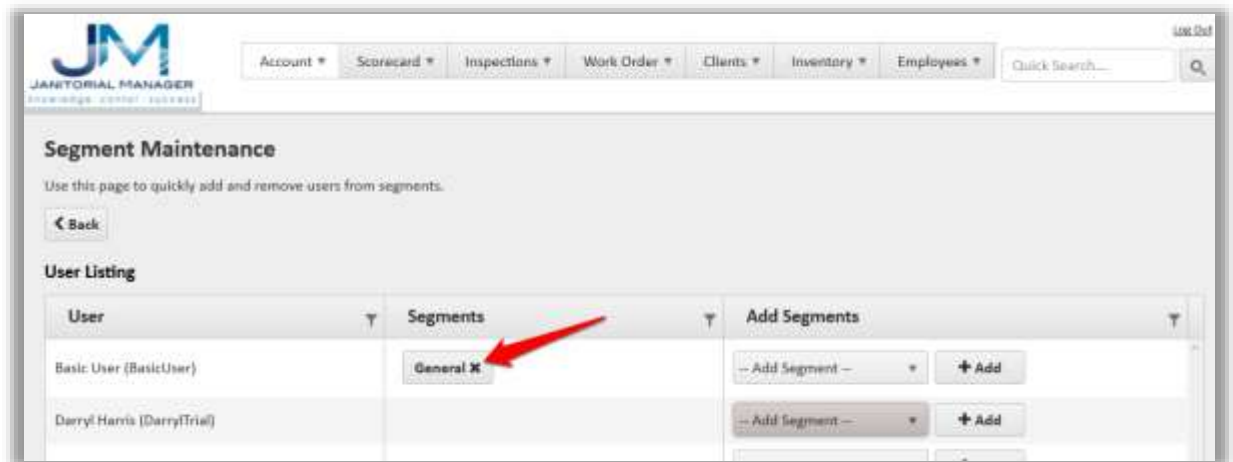


Figure 279

Manage Services

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

Add New Service

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

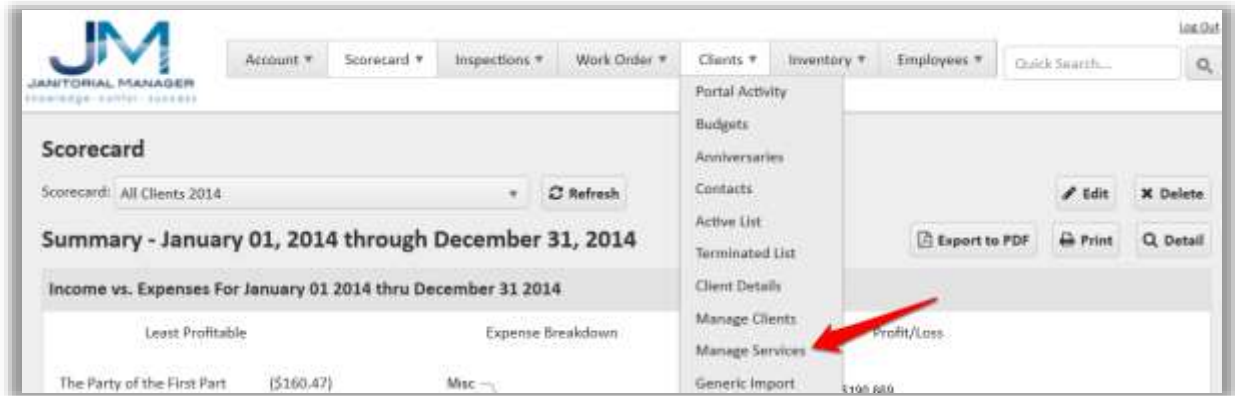


Figure 280

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

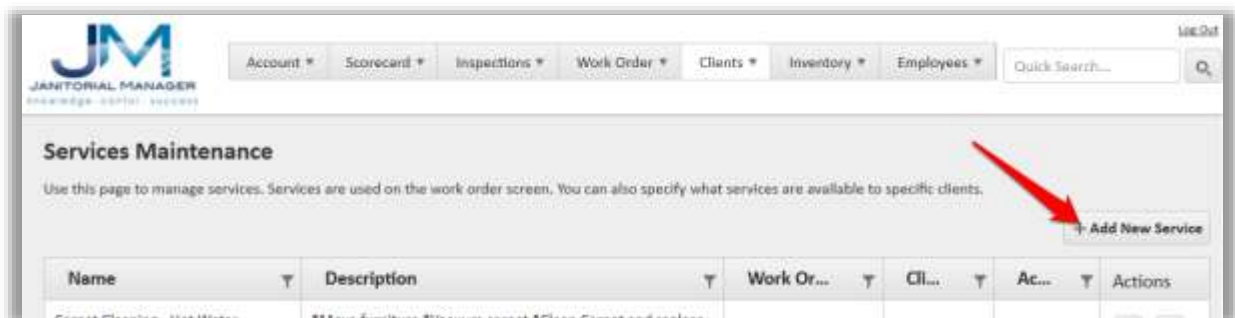


Figure 281

Complete the **Add New Service** form.

The screenshot shows the 'Add New Service' form in the Janitorial Manager (JM) software. The form has two main input fields: 'Name' and 'Description'. Both fields are marked with an asterisk (*) indicating they are required. Below the 'Description' field, there's a legend: '* Required field'. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

Figure 282

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

Edit a Service

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

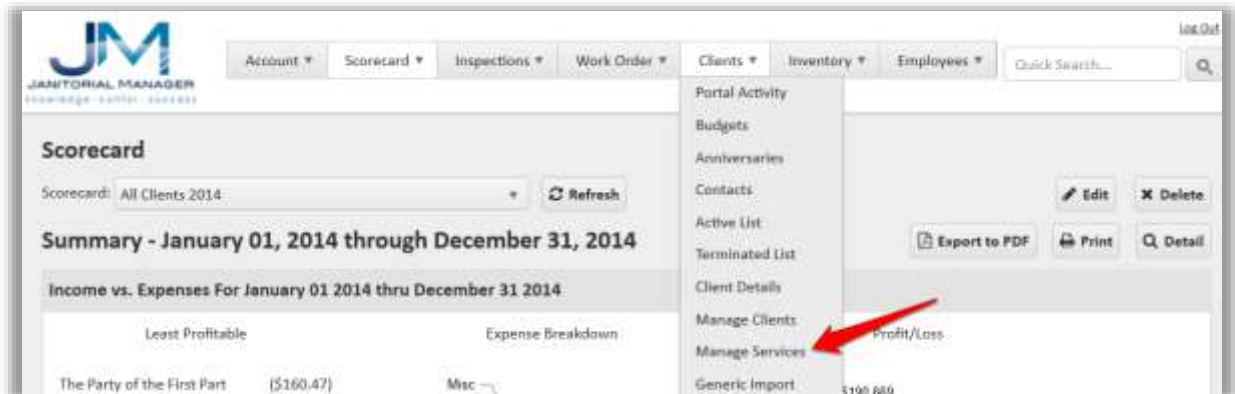


Figure 283

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

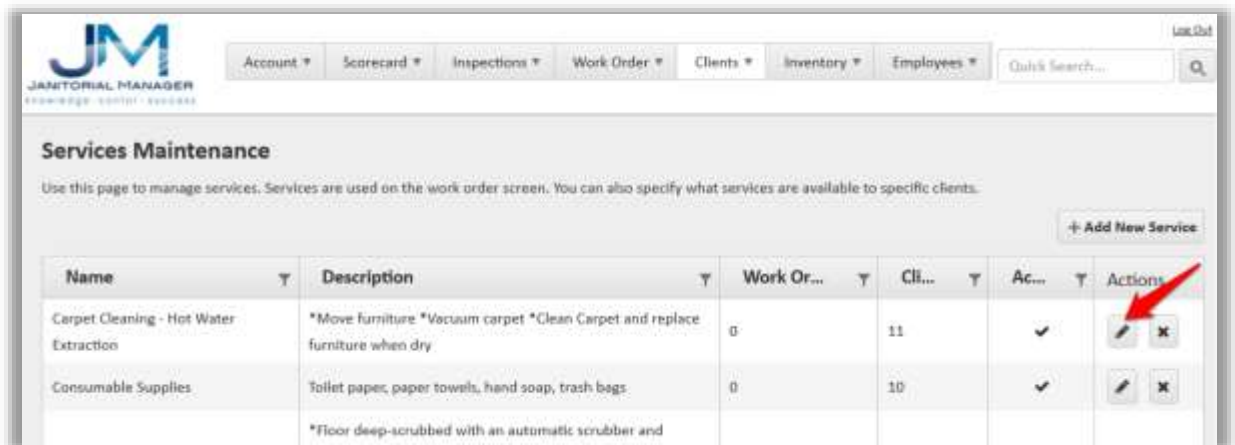


Figure 284

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

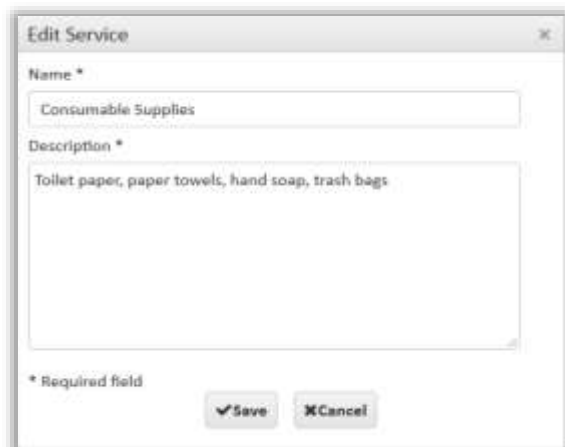


Figure 285

Delete a Service

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

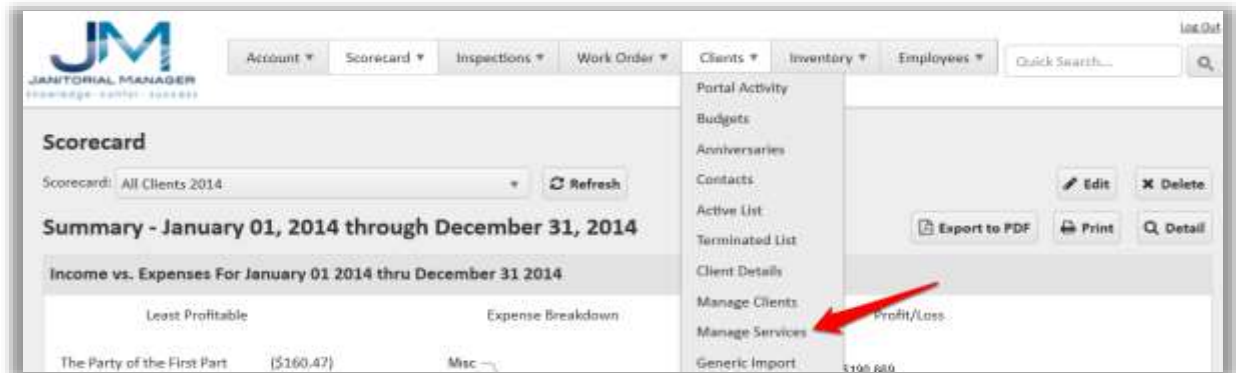


Figure 286

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

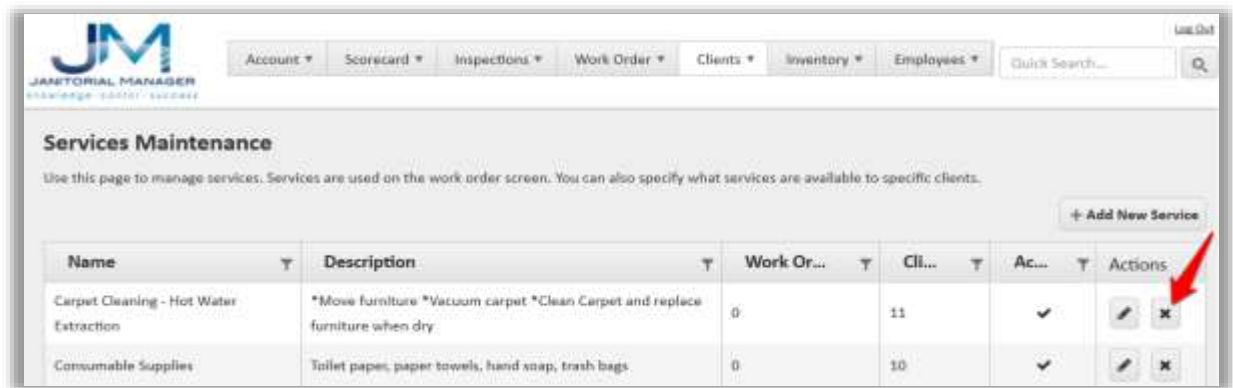


Figure 287

Assign Services to a Client

Services can be assigned to individual clients.

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

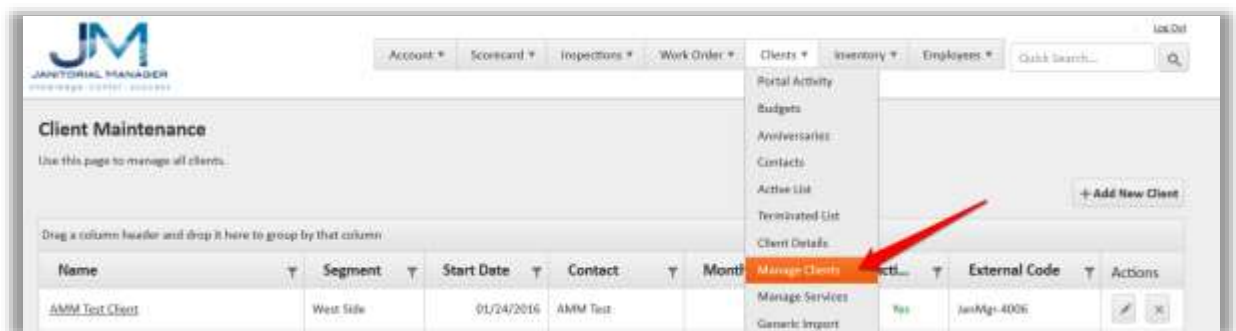


Figure 288

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

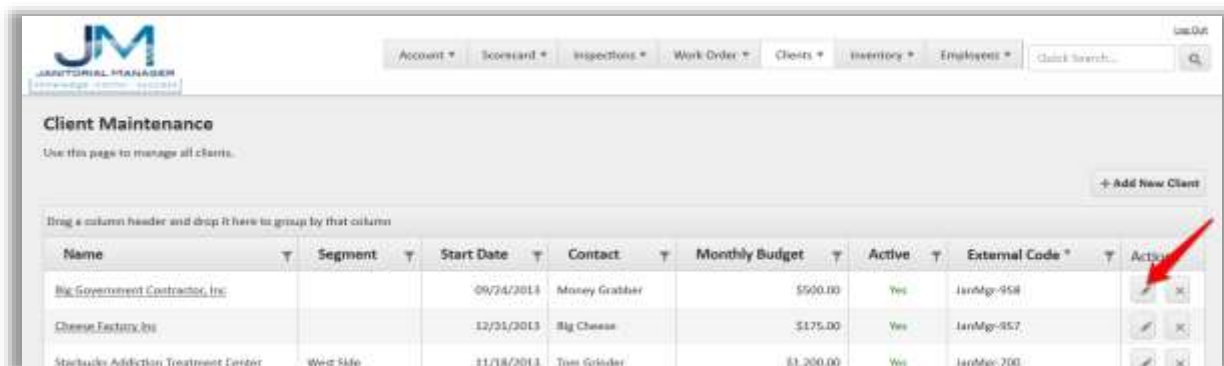


Figure 289

Click the **Services** tab.

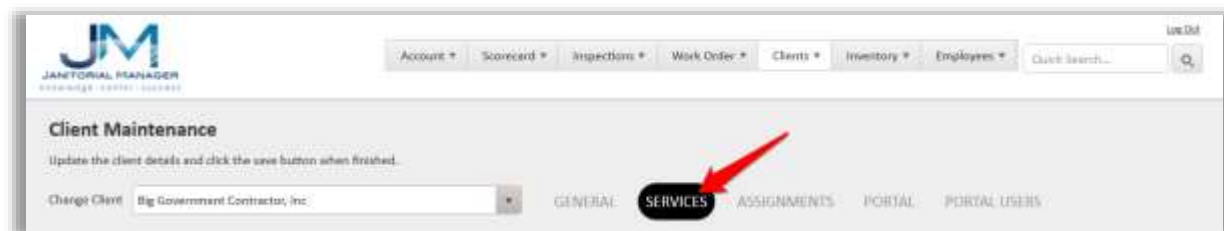


Figure 290

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

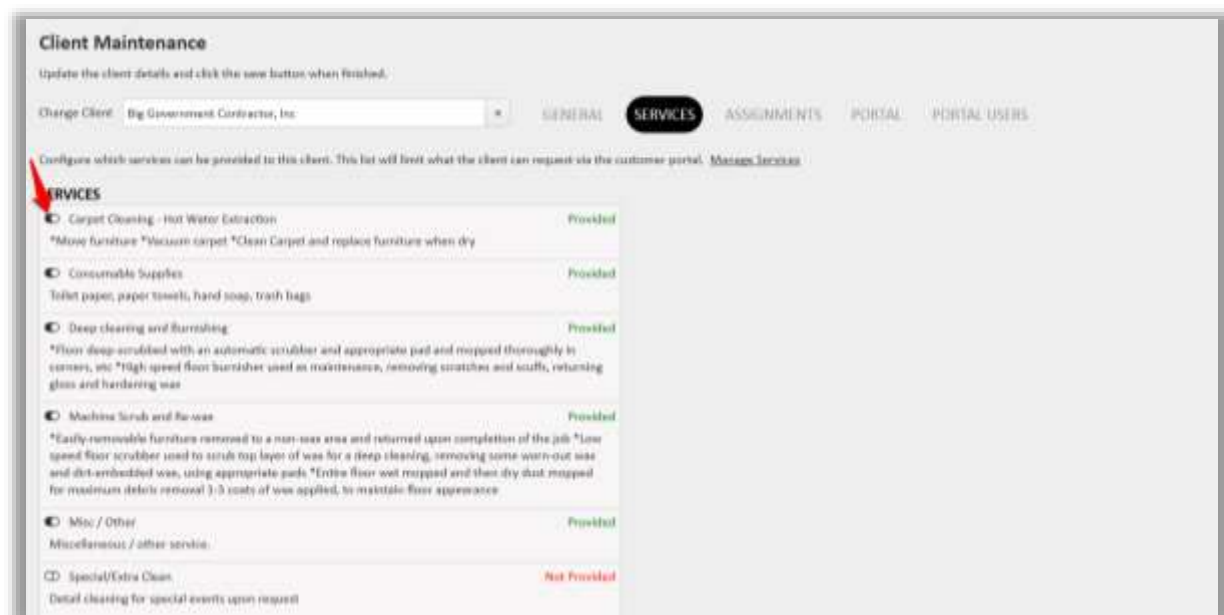
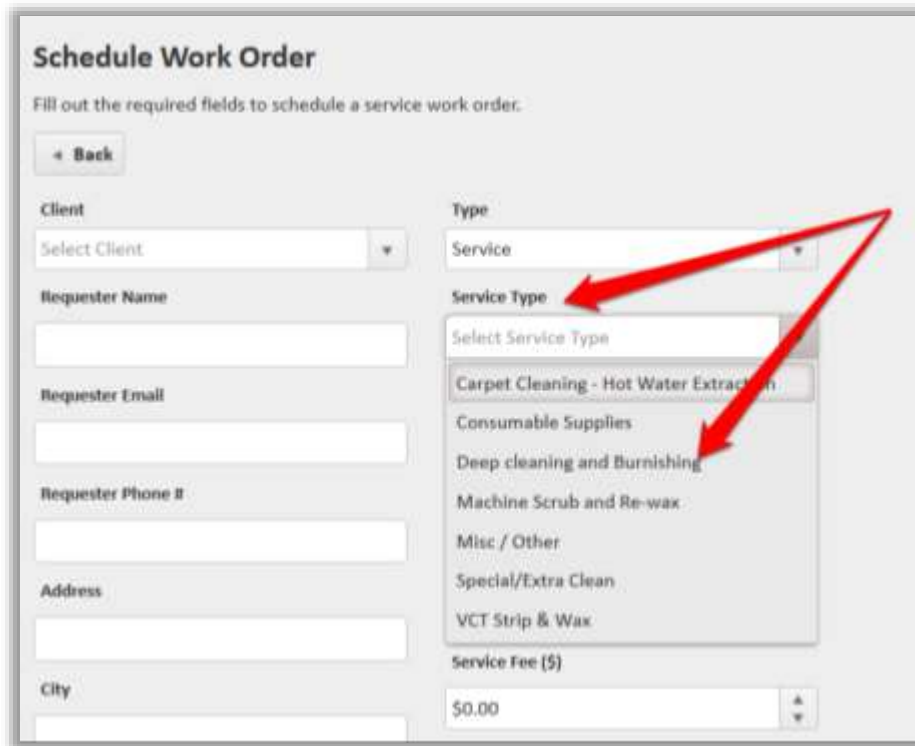


Figure 291

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



Schedule Work Order

Fill out the required fields to schedule a service work order.

[← Back](#)

Client <input type="text" value="Select Client"/>	Type <input type="text" value="Service"/>
Requester Name <input type="text"/>	Service Type <input type="text" value="Select Service Type"/>
Requester Email <input type="text"/>	<input type="text" value="Carpet Cleaning - Hot Water Extraction"/>
Requester Phone # <input type="text"/>	<input type="text" value="Consumable Supplies"/>
Address <input type="text"/>	<input type="text" value="Deep cleaning and Burnishing"/>
City <input type="text"/>	<input type="text" value="Machine Scrub and Re-wax"/>
	<input type="text" value="Misc / Other"/>
	<input type="text" value="Special/Extra Clean"/>
	<input type="text" value="VCT Strip & Wax"/>
	Service Fee (\$) <input type="text" value="\$0.00"/>

Figure 292

Client Portal

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

Enable the Portal for a Client

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

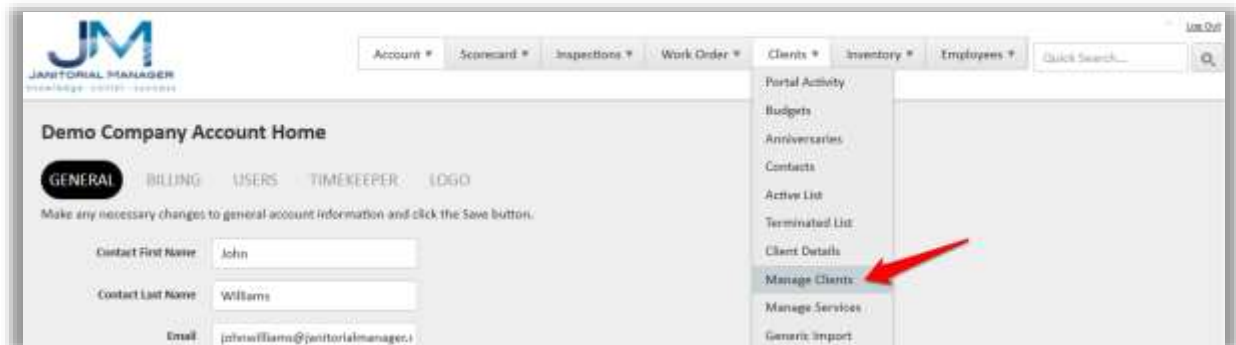


Figure 293

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

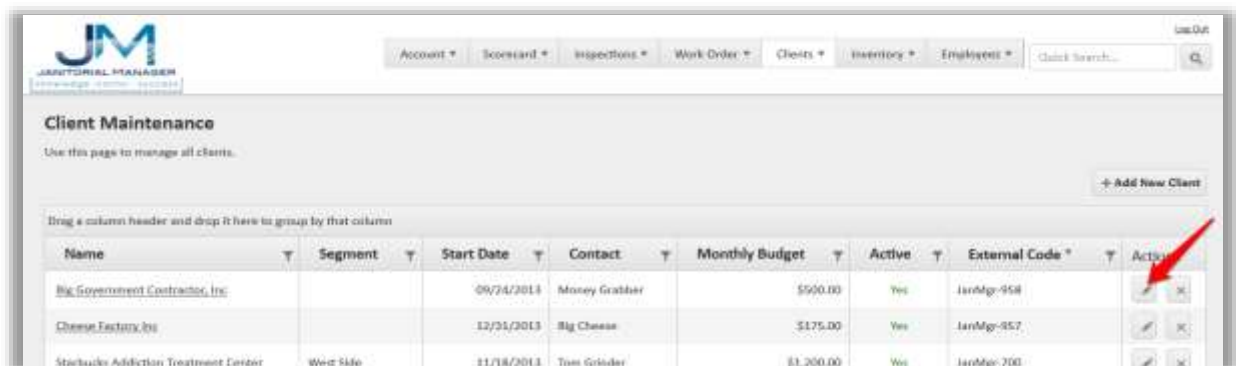


Figure 294

Click the **Portal** tab.

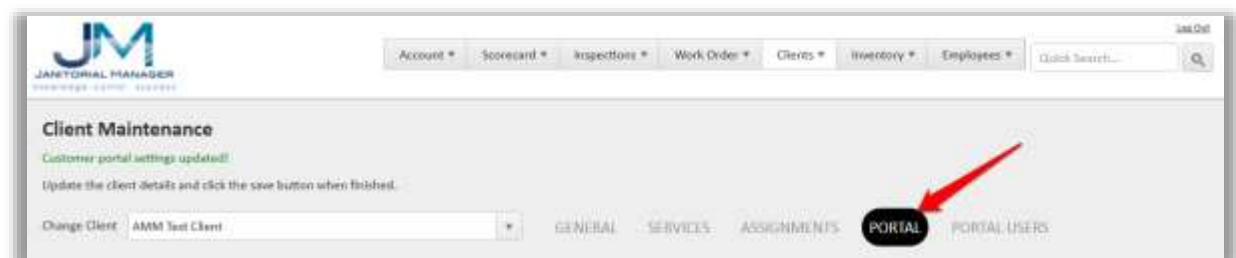


Figure 295

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

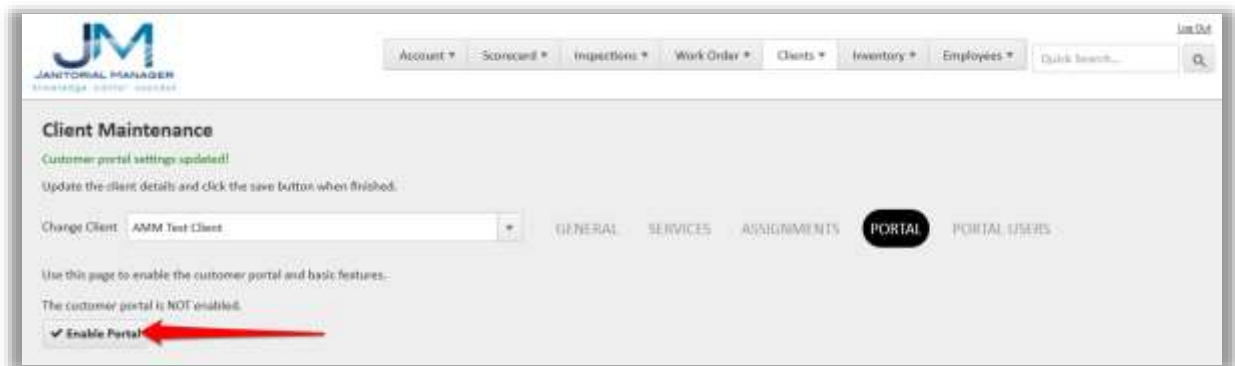


Figure 296

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

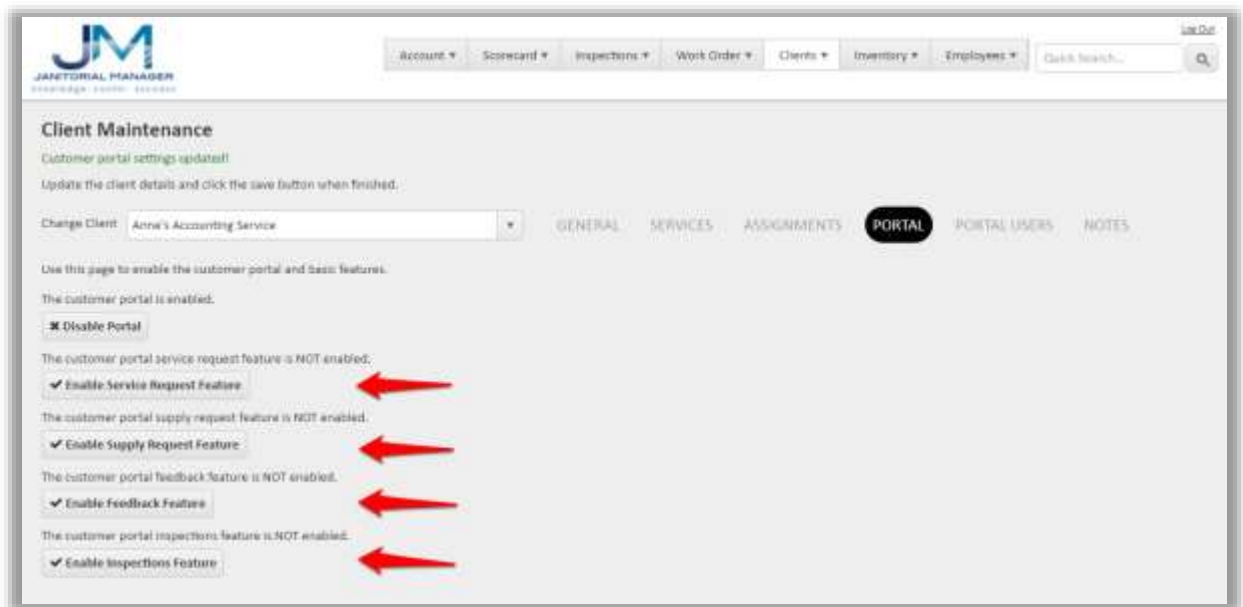


Figure 297

Enable or Disable Portal Options

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

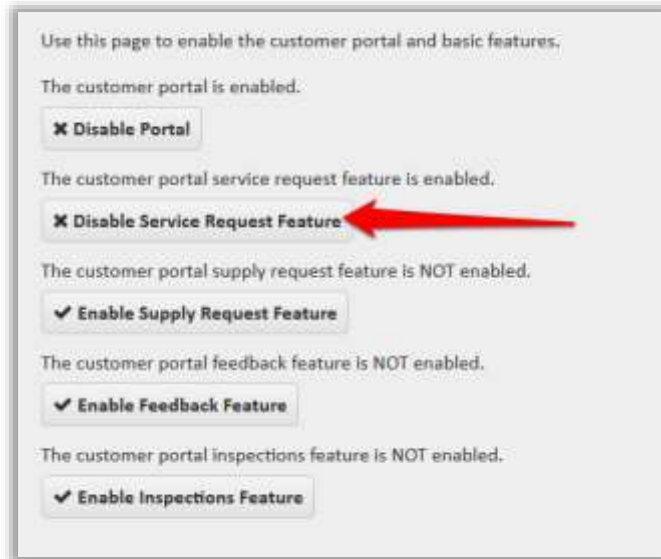


Figure 298

Portal Users

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

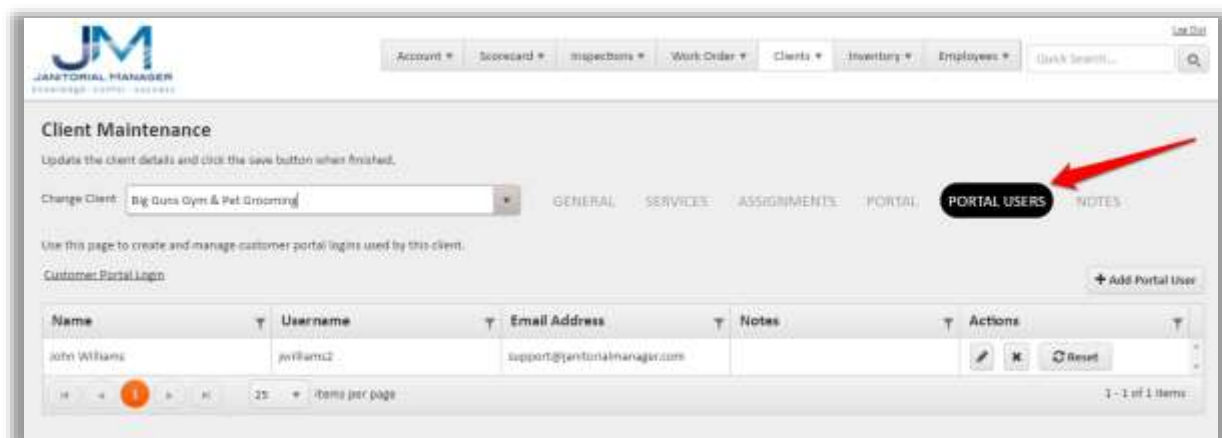


Figure 299

Add a New Portal User

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

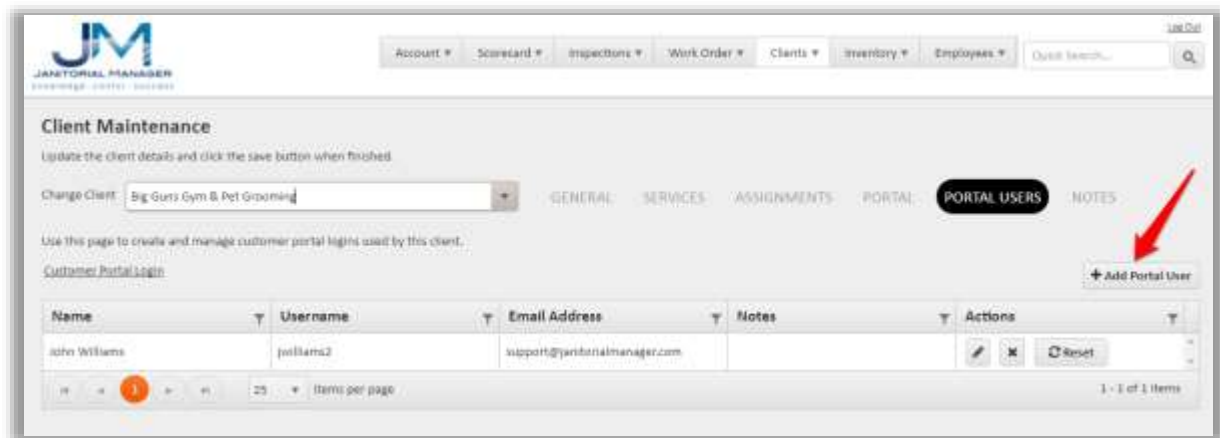


Figure 300

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

Use this page to create and manage customer portal logins used by this client.

[< Back](#)

First Name:	Office Phone:
<input type="text"/>	<input type="text"/>
Last Name:	Office Phone Ext:
<input type="text"/>	<input type="text"/>
Username:	Cell Phone:
<input type="text"/>	<input type="text"/>
Email Address:	
<input type="text"/>	
Notes:	
<input type="text"/>	
<input type="button" value="Save"/>	

Figure 301

Edit Portal User

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

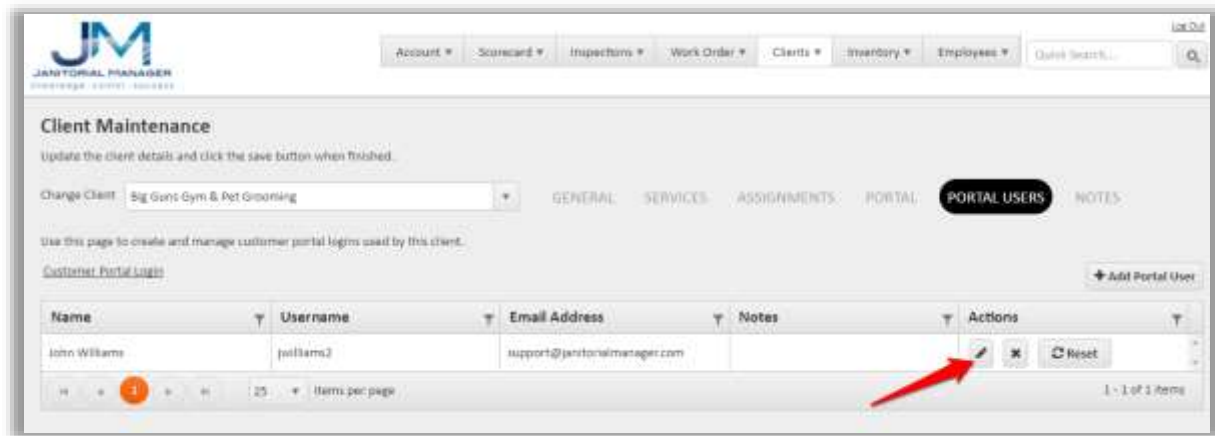


Figure 302

Make necessary edits and click the Save button.

The screenshot shows the 'Edit Portal User' form. It has a 'Back' button at the top left. The form contains several input fields: 'First Name' (John), 'Last Name' (Williams), 'Username' (jwilliams2), 'Email Address' (support@janitorialmanager.com), 'Office Phone', 'Office Phone Ext', and 'Cell Phone' (2566981423). There is a 'Notes' section with a text area. At the bottom left, there is a 'Save' button.

Figure 303

Delete Portal User

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

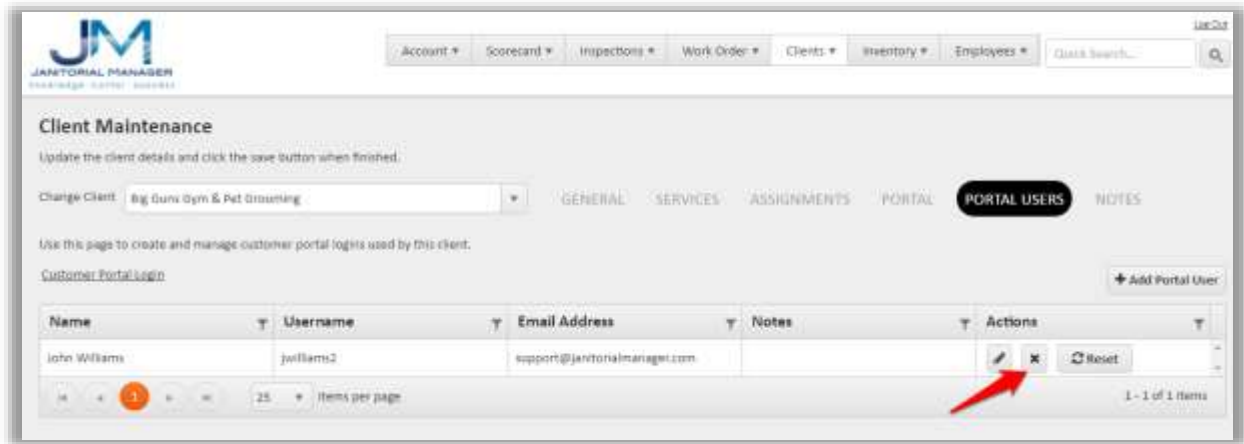


Figure 304

Reset Portal User Password

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

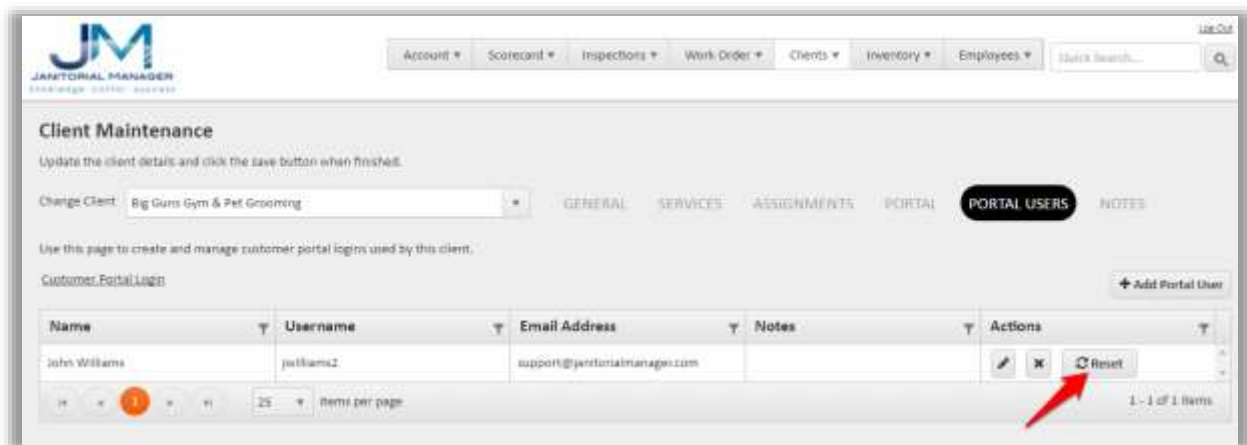


Figure 305

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

Assignments

Billing

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