



# **JM Customer & Location Setup**

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# JM Customer & Location Setup

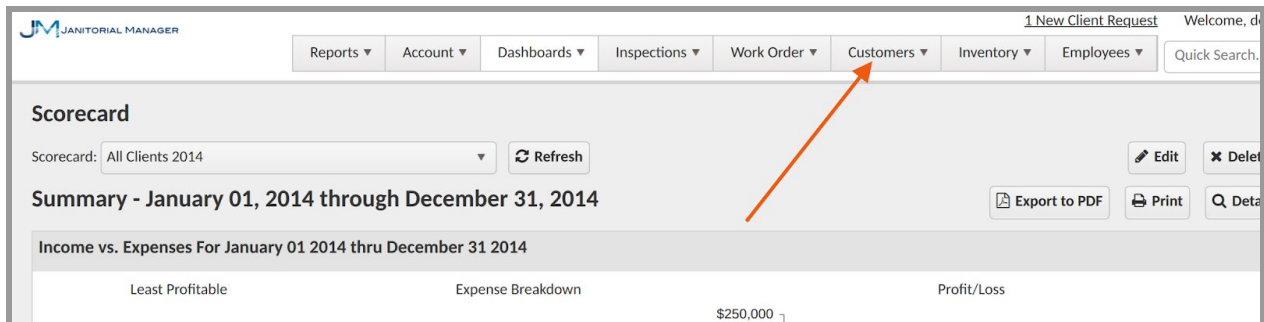
In an effort to create greater flexibility and ease of use for JM, we have created a new designation of Customer. The Customer level is the top level under which you can have any number of locations. So, for example, if you sign a new contract with a bank, you would create a new Customer record in JM. If this bank has 5 locations, you would then create a new record for each location under the Customer record. This will allow you to more effectively manage contracts with multiple locations.

The Client portal will now be easier for your clients to use. Now, when a Client logs into the portal they will be able to see and manage all associated location under that single login.

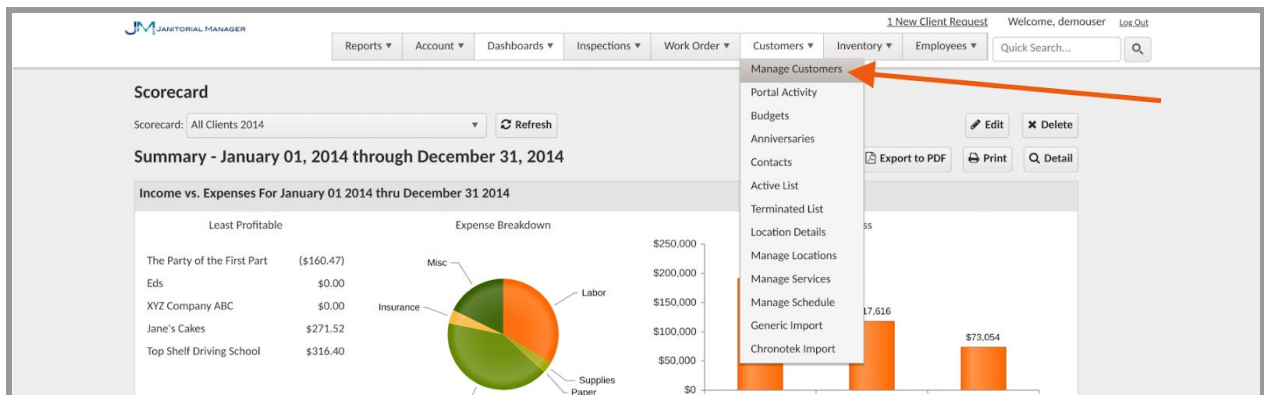
With this release all current clients will be assigned to a Customer record which will initially be your company name. The next step is to create new Customer records and assign Location records to the new Customer record.

JM Users can determine which client locations a client user can see when they login.

## New Navigation Menu



Clients has been changed to Locations menu and Customer Management has been added.



All previously existing Client records are now saved as a Location and can be associated with a

Customer.

## Customer Maintenance Page

On the Customer Maintenance page, users can view and edit existing Customers and see the number of associated Locations.

Customer Maintenance

GENERAL PORTAL USERS

Use this page to manage customers.

Initially all your customers will be under your company name here.

Add new Customers here.

Assign Locations to a Customer record here.

Name	Description	Locations	Actions
Big Company For Existing Clients	Big Company For Existing Clients	2	

1 - 1 of 1 items

Click the Add New Customer button to add a new Customer record.

Click the Location Listing button to assign a location record to a Customer record.

## Assign Location to a Customer

Customer Maintenance

Use this page to quickly add and remove locations from customers.

Location Listing

Location name

Assigned Customer

Assign or change Assignment by selecting the customer from the drop down

Location	Customer	Customer Actions
AMM Test Client	Big Company For Existing Clients	-- Select Action --
Anne's Accounting Service		-- Select Action --
Bank of America		-- Select Action --
Big Government Contractor, Inc		-- Select Action --
Big Guns Gym & Pet Grooming		-- Select Action --

A Location can only be added to one Customer.

**Customer Maintenance**  
Use this page to quickly add and remove locations from customers.

← Back

Select the desired Customer from the drop down.

Location	Customer	Customer Actions
AMM Test Client	Big Company For Existing Clients	-- Select Action --
Anne's Accounting Service		-- Select Action --
Bank of America		-- Select Action --
Big Government Contractor, Inc.		-- Select Action --
Big Guns Gym & Pet Grooming		Map To Big Company For Existing Clients
Big Joe's Auto Sales		-- Select Action --
Cheese Factory Inc		-- Select Action --

To assign a Location to a Customer record, click the drop down next to the Location and select the desired Customer.

## Portal Users

To setup or edit Client side Portal Users, Click the Portal Users button.

**Customer Maintenance**  
Portal user successfully enabled and the new user welcome email was sent.

GENERAL **PORTAL USERS**

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

Change Customer: Other Big Company | Change Location: Bank of America

Customer Portal Login | + Add Portal User

To view or edit existing Portal Users. Select the desired Customer, then select the desired Location from the list of associated Locations. Existing Users will be displayed.

**Customer Maintenance**  
GENERAL **PORTAL USERS**

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

Change Customer: Other Big Company | Change Location: Bank of America

Customer Portal Login | + Add Portal User

Name	Username	Email Address	Notes	Actions
Tim Smith	Tsmith	johnwilliams@janitorialmanager.com		✎ ✕ ↺ Reset

25 items per page | 1 - 1 of 1 items

To add a new Portal user, click the Add Portal User button. Select the desired Customer and then click the Select Location box to add one or more Locations. Complete the new Portal User information.

The screenshot shows the 'Customer Maintenance' interface with the 'PORTAL USERS' tab selected. The form includes a 'Back' button, a 'Select Customer' dropdown menu (currently showing 'Other Big Company'), and a 'Select Locations' box (currently showing 'Bank of America'). Below these are input fields for 'First Name', 'Last Name', 'Username', 'Email Address', and 'Notes'. There are also fields for 'Office Phone', 'Office Phone Ext.', and 'Cell Phone'. A 'Save' button is at the bottom left. Three red arrows point to the 'Select Customer' dropdown, the 'Select Locations' box, and the 'Username' field, with labels: 'Select a Customer', 'Click box to add one or more Locations', and 'Complete Client Portal User information' respectively.

When a Portal User logs in to the Portal, they can chose which location to view.

The screenshot shows the login page for 'JM JANITORIAL MANAGER'. It features a logo placeholder with the text 'Your logo shows here' and an arrow pointing to the JM logo. Below the logo is the text 'Welcome! Please log in.' followed by input fields for 'User Name', 'Location', and 'Password'. The 'Location' field is a dropdown menu with the text 'Select Location' and a downward arrow. A 'Log In' button is below the password field, and a 'Forgot Password' link is at the bottom. A red arrow points to the 'Location' dropdown menu with the label 'Client user can select from list of Location Portals that have been assigned to them'.