



Welcome Guide For The Client Portal

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Contents

Welcome	2
Access to Your Portal	2
Logging In.....	3
Service and Supply Requests	5
Service Requests	6
Supply Request	8
Inspections.....	10
Feedback.....	12
Troubleshooting	15

Welcome

Thank you for using the Client Portal feature of Janitorial Manager! The Portal is designed to provide easy and effective communication between you and your service provider. Please review the contents of this manual to better understand how to make the most out of the Client Portal.

Access to Your Portal

When your service provider activates the Client Portal, you will receive an email with a link to your very own portal and a temporary password. If you don't immediately see the email, check your spam folder. It should look something like the email below (Figure 1).

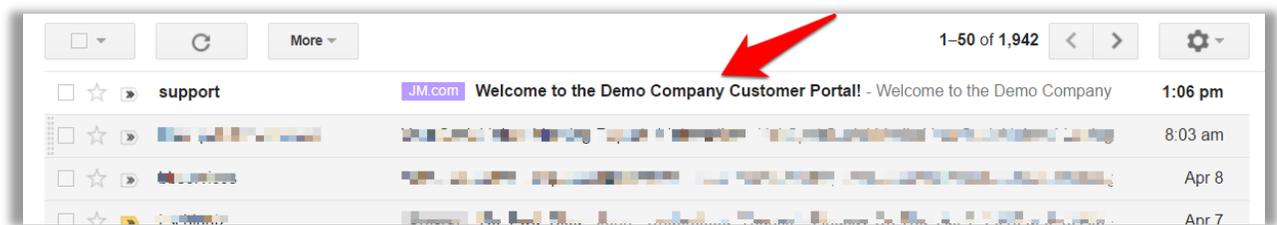


Figure 1

Open the email and click the Login Now! Link. This link is your own special portal for your organization only. Your Username and temporary password are provided in the email as seen below below (Figure 2).

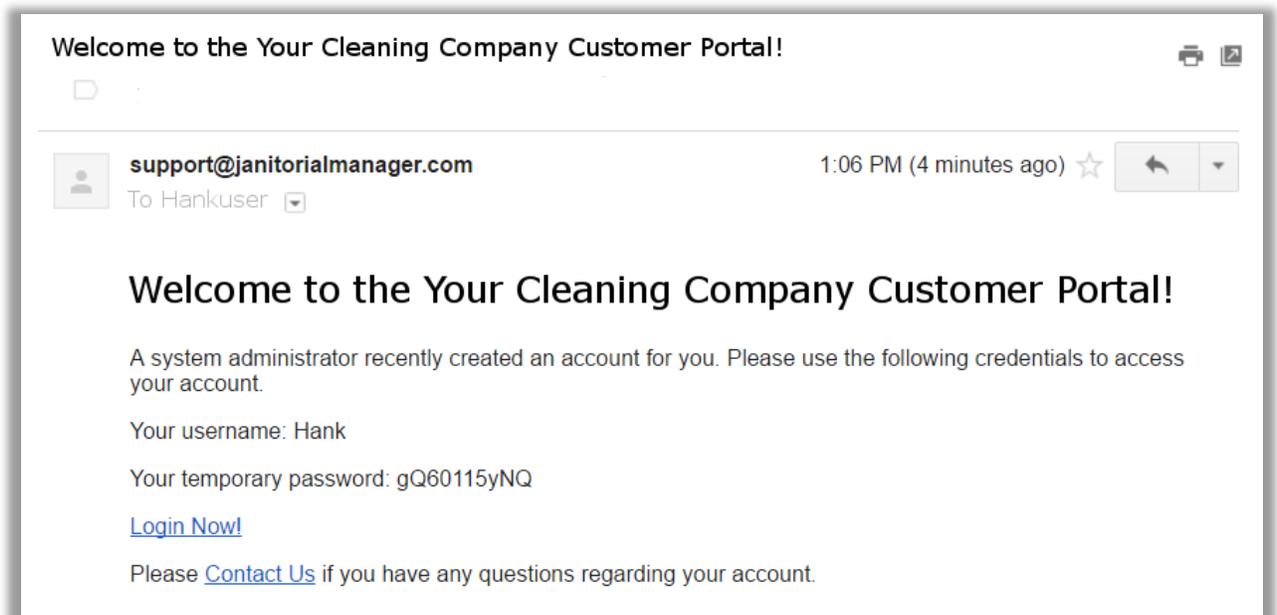


Figure 2

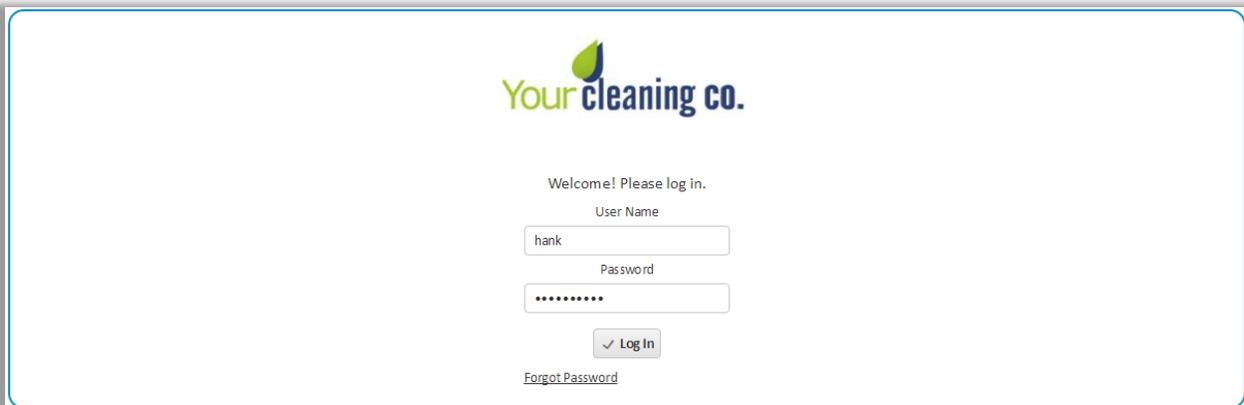
If you need assistance click the [Contact Us](#) link in the email. Please note that this will connect you with the support at Janitorial Manager NOT your service provider.

Logging In

When you click that "Login Now!" Link in the email you will be taken to a page similar to the one seen below (Figure 3).

It is a good idea to **bookmark** the log in page in your browser if you are not using the JM Connect mobile app to communicate with you cleaning service provider.

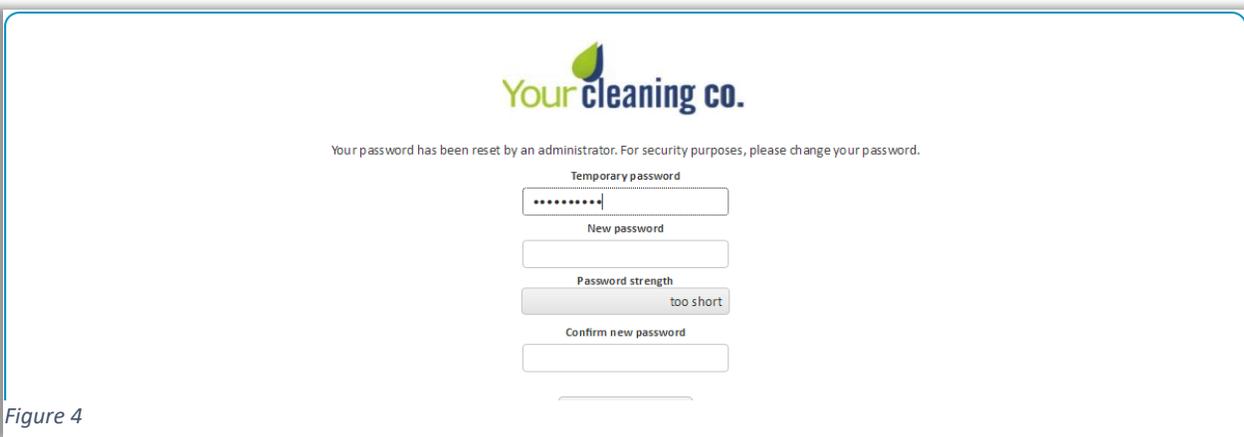
You will then type in your username and password from the email in your inbox and click "Log In"



The screenshot shows the login page for 'Your cleaning co.'. At the top center is the company logo. Below it, the text reads 'Welcome! Please log in.'. There are two input fields: 'User Name' containing the text 'hank' and 'Password' containing a series of dots. Below the password field is a 'Log In' button with a checkmark icon. At the bottom left of the form area is a link for 'Forgot Password'.

Figure 3

You will then be prompted to create a permanent password. Again fill in your temporary password from your welcome email and then create your own password and confirm your new password. (Figure 4)



The screenshot shows the password reset page for 'Your cleaning co.'. At the top center is the company logo. Below it, the text reads 'Your password has been reset by an administrator. For security purposes, please change your password.'. There are three input fields: 'Temporary password' containing a series of dots, 'New password', and 'Confirm new password'. Below the 'New password' field is a 'Password strength' indicator showing 'too short'. At the bottom of the form area is a 'Log In' button.

Figure 4

NOTE: The Password Strength indicator will let you know when you have a strong enough password (Figure 5). The Password Strength indicator will be green when your password is sufficiently secure as seen below. (Figure 6)



Figure 5



Figure 6

After you create your own permanent password, you will be prompted to agree to the terms and conditions of Janitorial Manager. (Figure 7)

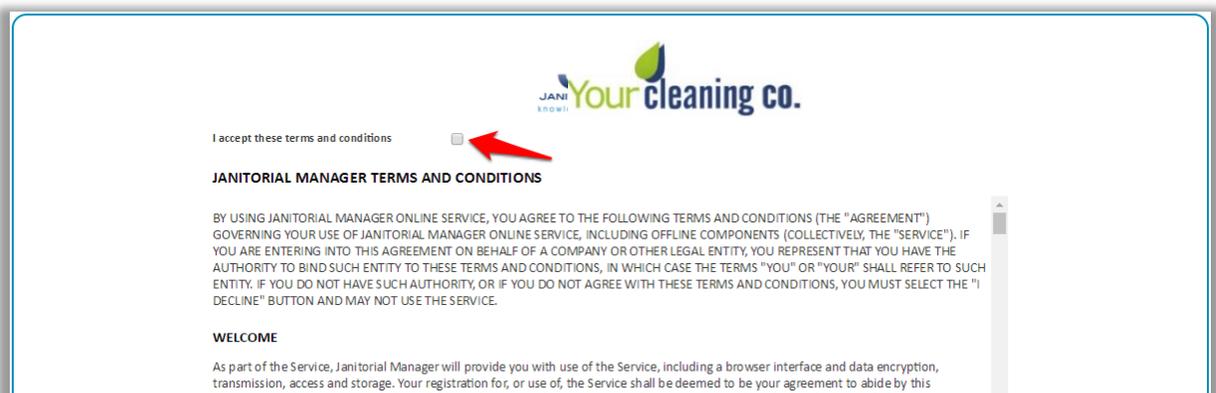


Figure 5

Review the terms and conditions. Check the Accept box and then Click the Continue button. (Figure 8)

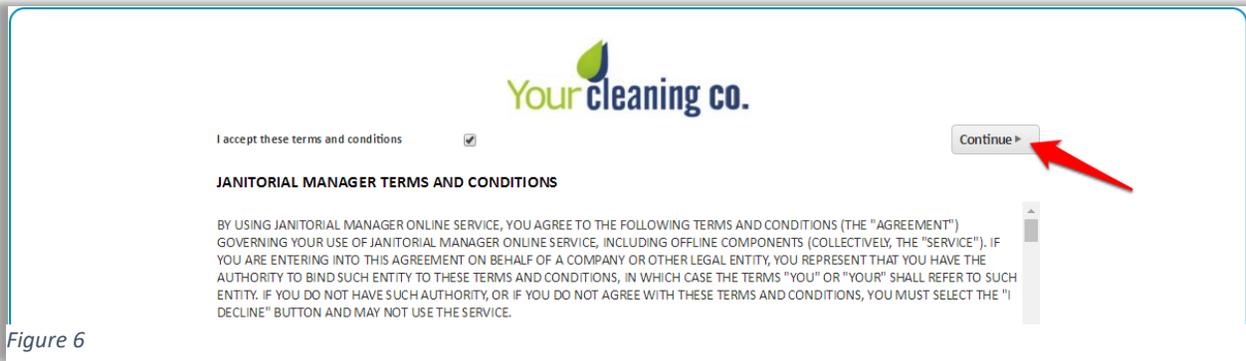


Figure 6

Client Portal Home Page

The Client Portal feature in Janitorial Manager empowers a cleaning company's clients so that they are constantly aware of what's happening in their buildings. Clients can submit work orders and let the cleaning company know if additional work is needed.

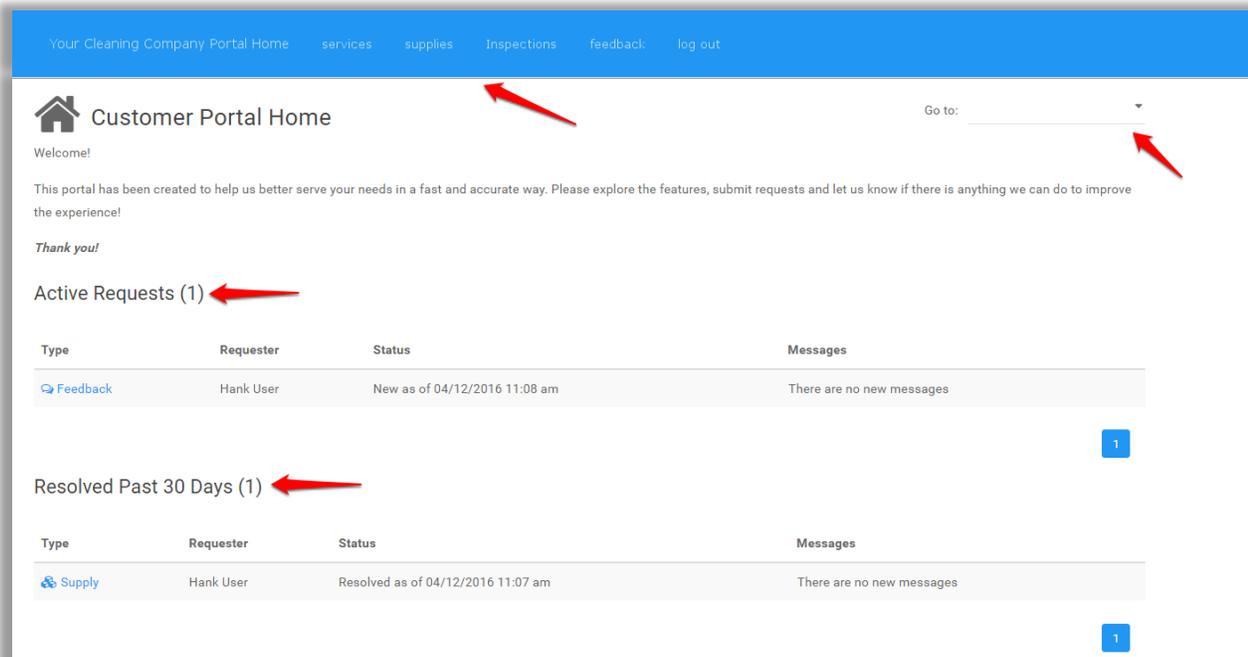


Figure 9

The Client Portal Home page is composed of 4 parts:

1. Navigation Menu - Use the navigation menu to select the available options
*This differs based on what functionality your service provider is offering.
2. Active Requests – This section displays submitted requests that are still active.

3. Resolved Requests – This section displays submitted requests that have been resolved within the last 30 days.
4. Go to – Use this navigation to selection the desired section.

Service and Supply Requests

There are 2 different ways submit service and Supply requests with the client portal of Janitorial Manager.

Service Requests

One way is to navigate to the “Services” tab of the navigation bar at the top of your portal. Once the page loads, Click “+Request Service” on the right side of the screen. (Figure 10)

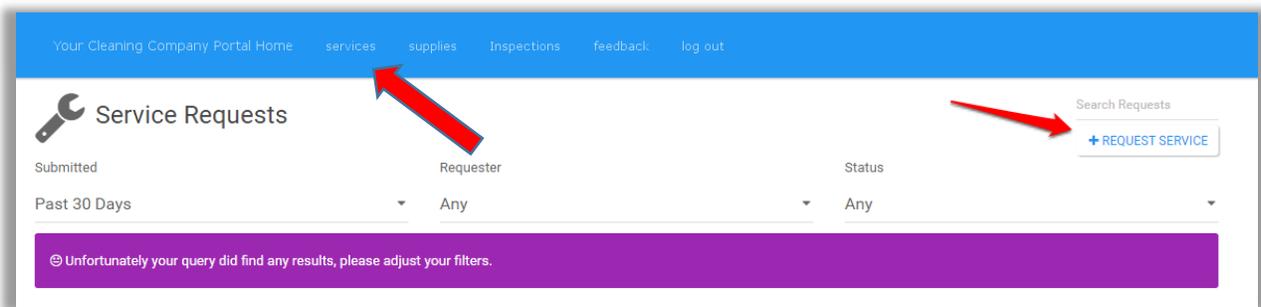


Figure 10

There is also a short cut to submit a service request. You can also submit a service request using the “Go To:” drop down on the home page of the Client Portal. By clicking the “Create Service Request” option you will get to the page to submit your service request as well. (Figure 11)

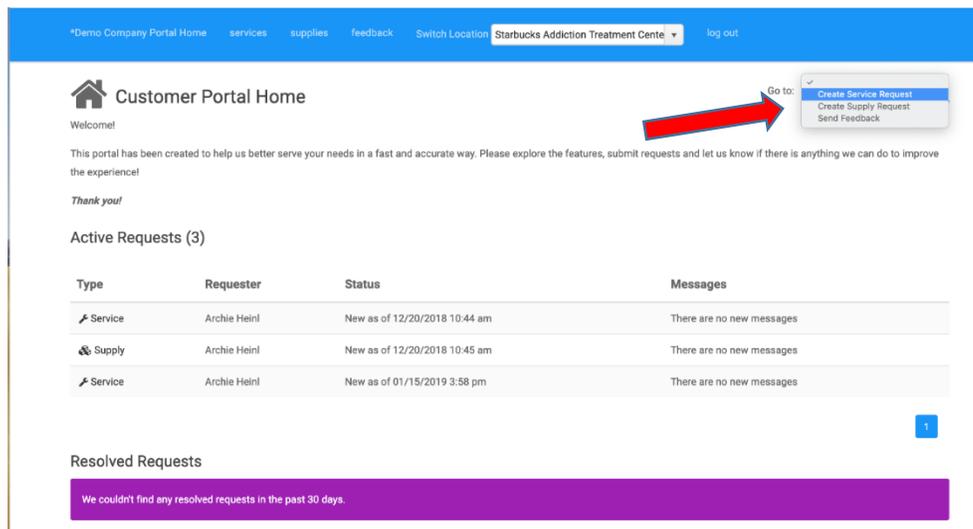


Figure 11

On the Request Service page you can make all necessary edits to the supply request. The Suite/Floor/Department field is required. Be as specific as you can. Then select the service type needed to be completed (required field). When the form is complete click the "Submit Request" button. (Figure 12)

Your Cleaning Company Portal Home services supplies Inspections feedback log out

Request Service

Please fill out the form below to request a service.

Request Contact
Hank User
20212123353 2026355599

Service Address (required)
123 The Next Street Over

Suite/Floor/Department (required)

City (required)
Yonder

State (required)
AL

Zip Code (required)
334433

Service Type (required)

- Carpet Cleaning - Hot Water Extraction
- Consumable Supplies
- Deep cleaning and Burnishing
- Machine Scrub and Re-wax
- Misc / Other

Would you like to provide any additional information?

[SUBMIT REQUEST](#)

Figure 12

Once submitted, you will receive notification of confirmation that your request has been submitted to your service provider. (Figure 13)

Your Cleaning Company Portal Home services supplies Inspections feedback log out

Service Request Sent!

We will review your request shortly. Your satisfaction is very important to us!

If you do not hear from us within an acceptable period of time please call your account manager directly.

[View All Service Requests](#)

Figure 13

Supply Requests

There are also 2 different ways to submit supply requests. The first way is by clicking the "Supplies" option from the header menu of your client portal. Once the page loads, click the "+Request Supplies" button on the right side of the screen. Then you will move on to the request form.

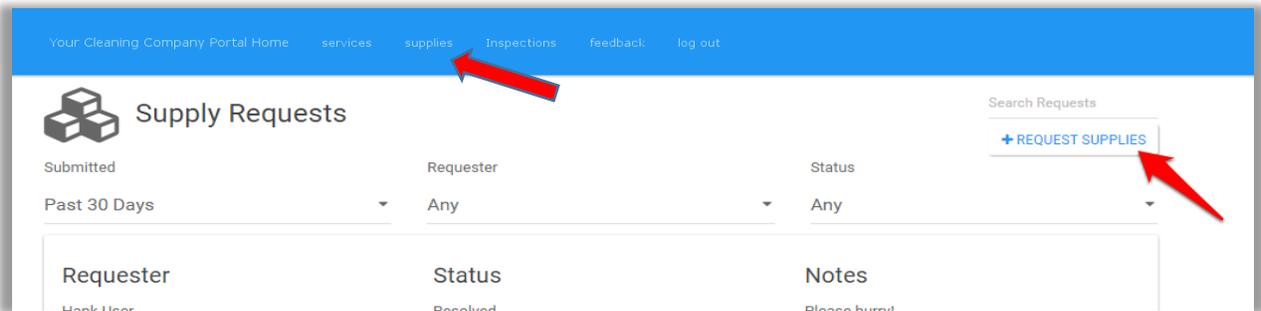


Figure 7

There is also a short cut to submit a supply request. You can also submit a supply request using the "Go To:" drop down on the home page of the Client Portal. By clicking the "Create Supply Request" option you will get to the page to submit your service request as well. (Figure 15)

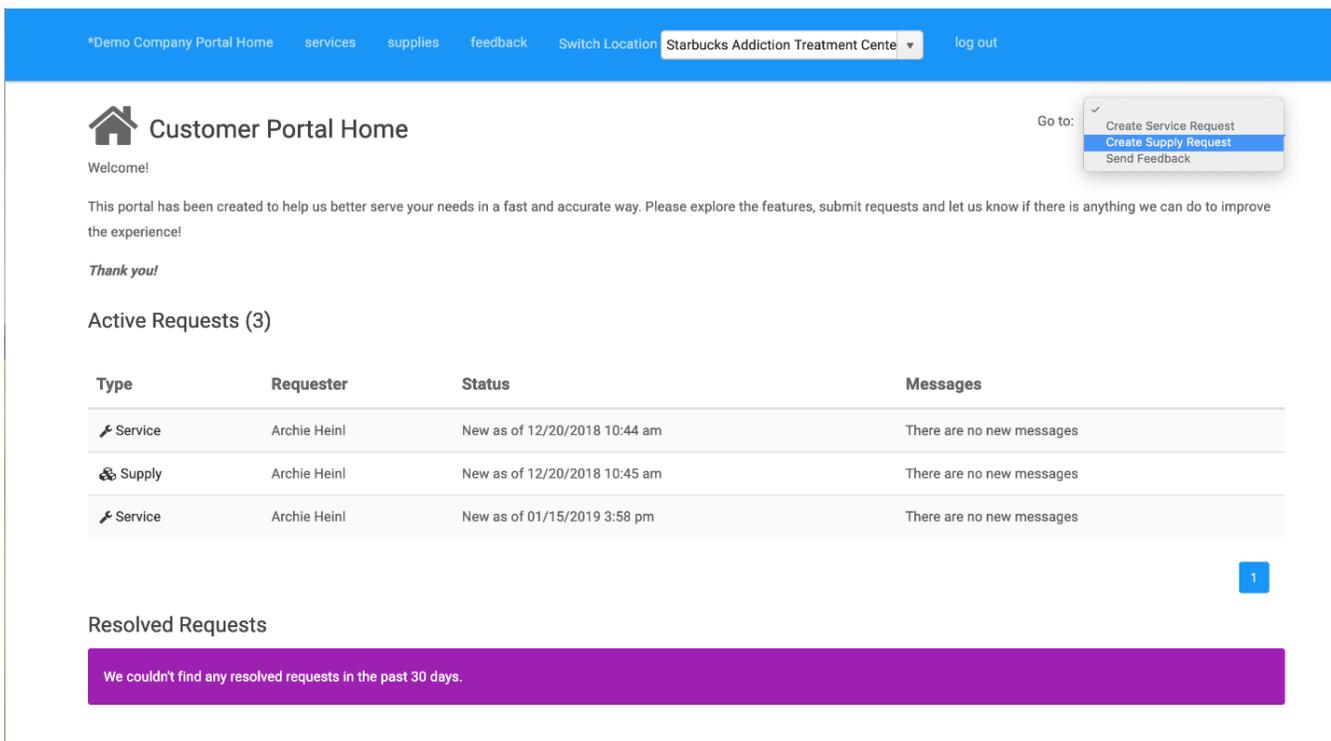


Figure 15

Both options will take you to the "Request Supplies" form to fill out. Here you can let your service provider what you are needing as well wehre you need it. Please be as specific as you can. Once the form is completed, Click "Submit Request". (Figure 16)

The screenshot shows a web interface for requesting supplies. At the top, there is a navigation bar with links for 'Demo Company Portal Home', 'services', 'supplies', 'inspections', 'feedback', and 'log out'. Below this is the 'Request Supplies' header with a cube icon. The main content area is titled 'Please fill out the form below to request supplies.' and contains several sections:

- Request Contact:** Hank User, johnwilliams@ximation.com, 20212123353 2026355599
- Service Address (required):** 123 The Next Street Over, Suite/Floor/Department (required), City (required) Yonder, State (required) AL, Zip Code (required) 334433, Desired Date/Time (required) 04/12/2016
- Supplies:** A table with columns 'Items' and 'Quantity'. The items listed are Toilet Paper, Hand Soap, Paper Towels, and Kleenex, each with a quantity of 0. A total of 'Items: 0' is shown at the bottom of the table.
- Additional Details:** A section with a question 'Would you like to provide any additional information?' and a text input field.

Red arrows point to the 'Service Address' field, the 'City' field, and the 'SUBMIT REQUEST' button.

Items	Quantity
Toilet Paper	0
Hand Soap	0
Paper Towels	0
Kleenex	0
Items: 0	

Figure 8

Inspections

To view recent or past inspections of your locations, click the "Inspections" option in the navigation menu. You will then come to the "Inspections" section of the client portal. Here you can review recently completed inspections. Select the date range to display the desired inspections. (Figure 17)

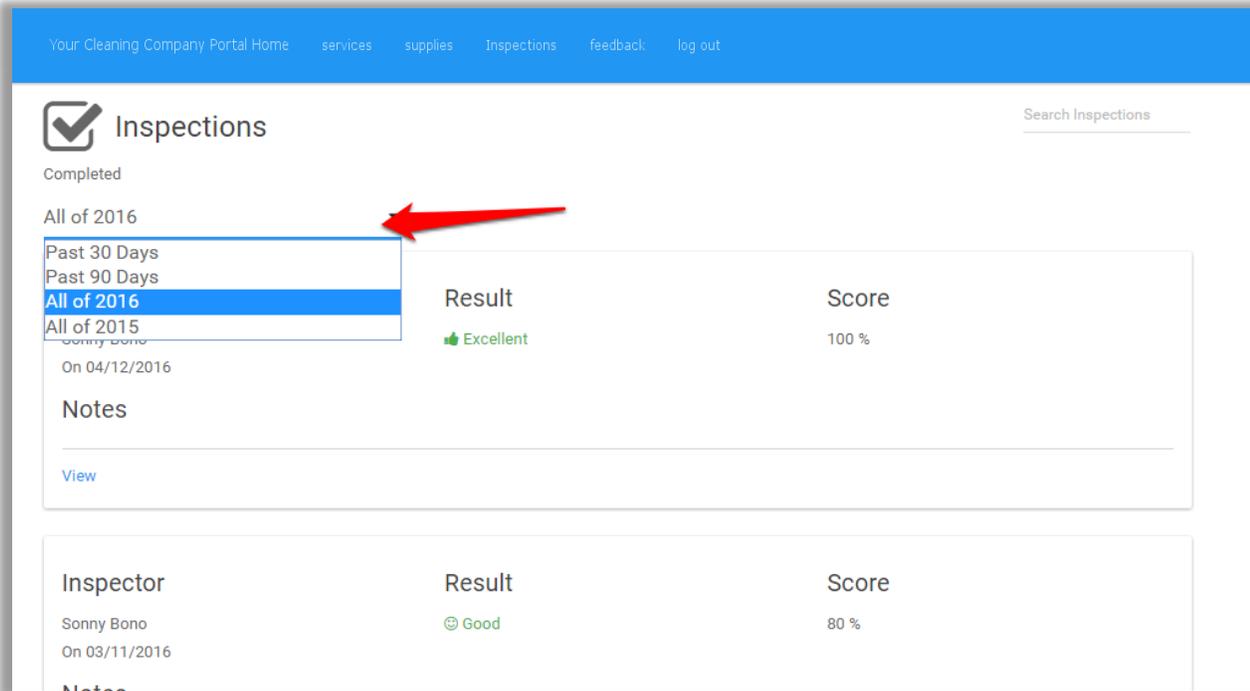


Figure 17

To view the desired inspection report for a certain date range, Click the "View" bottom as seen in Figure 18.

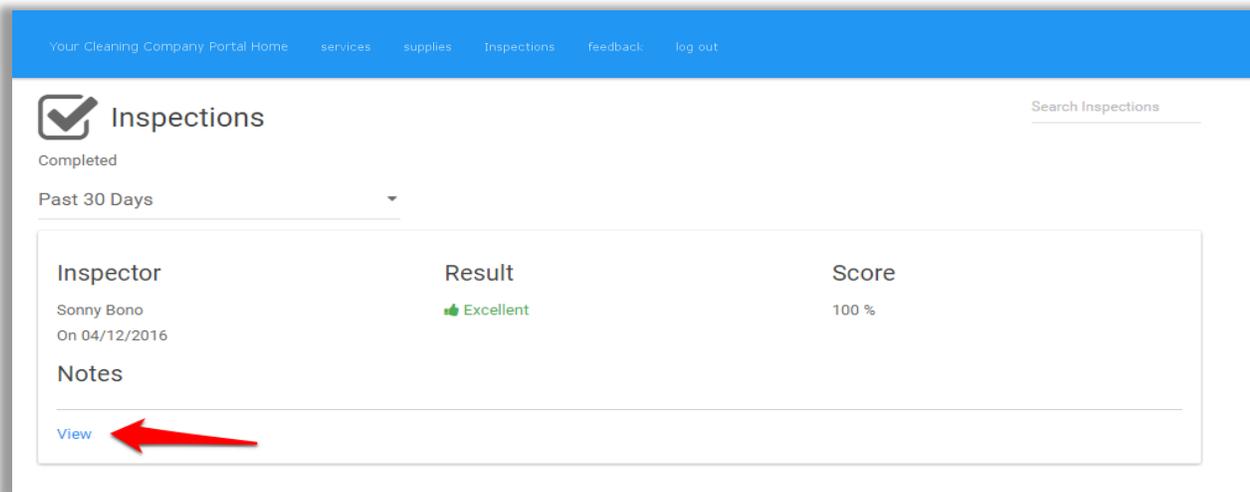


Figure 18

After clicking "View", the inspection report/details will open like Figure 19. You can review what was inspected and the grade of each inspection.

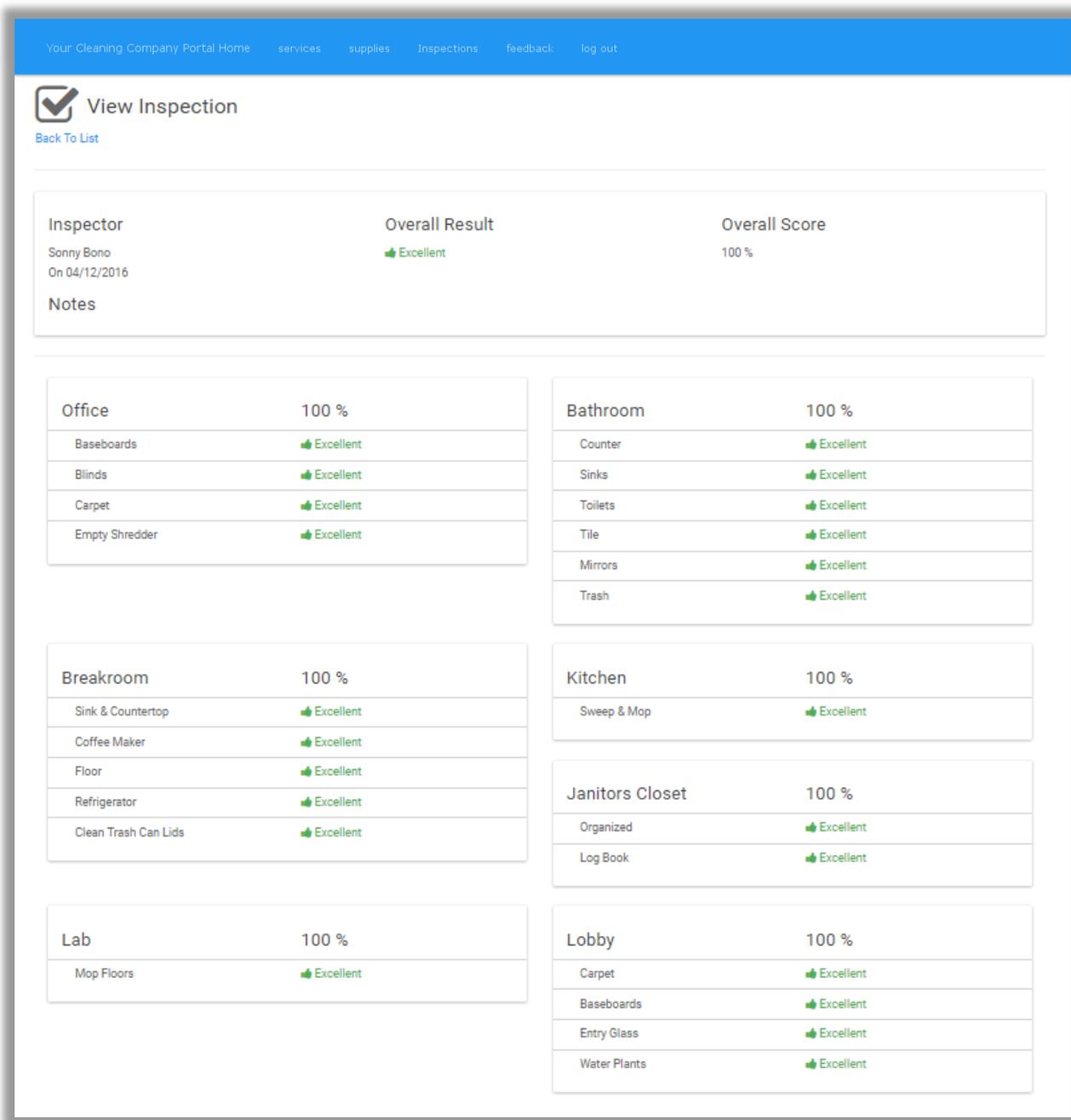


Figure 9

Feedback

The Feedback section of the Client portal allows you to see the feedback given based on the recent inspections that were completed in your location. This feature also allows you to send some feedback to your cleaners as well. Click Feedback from the navigation bar to view recent feedback.

If you want to leave some valuable feedback for the cleaning staff, Click "+Send Feedback" to leave a note. (Figure 20)

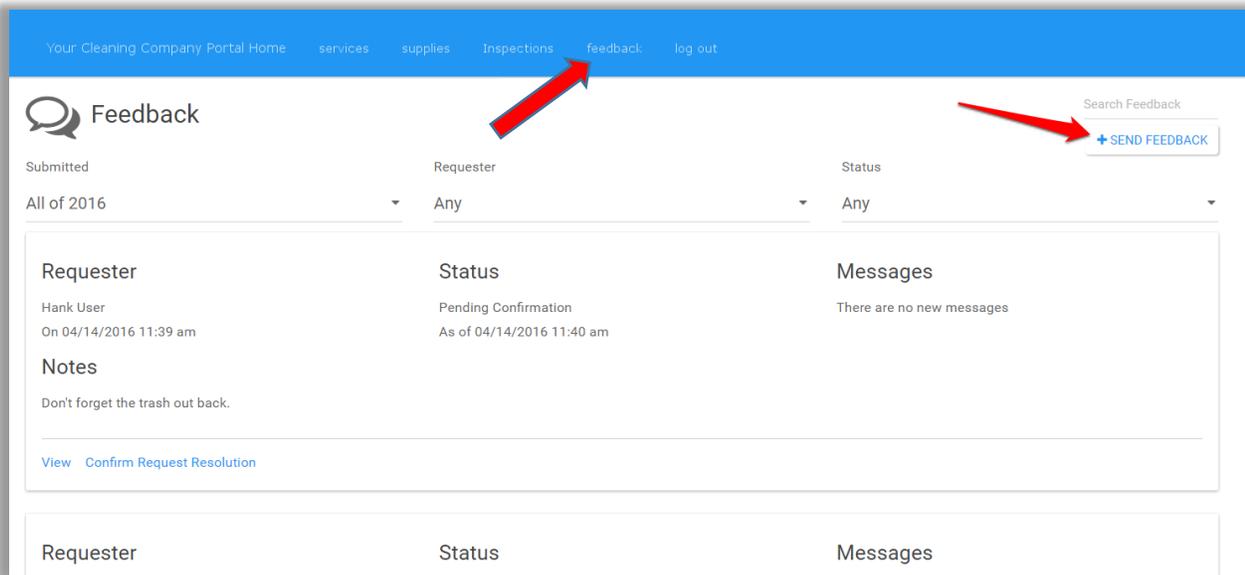


Figure 20

There is a shortcut if you are just looking to give feedback without reviewing past work. From the homepage of the client portal, Click the "Go To:" drop down on the right of your screen. Click "Send Feedback" to add your note to the service company or specifically the cleaners. (Figure 21)

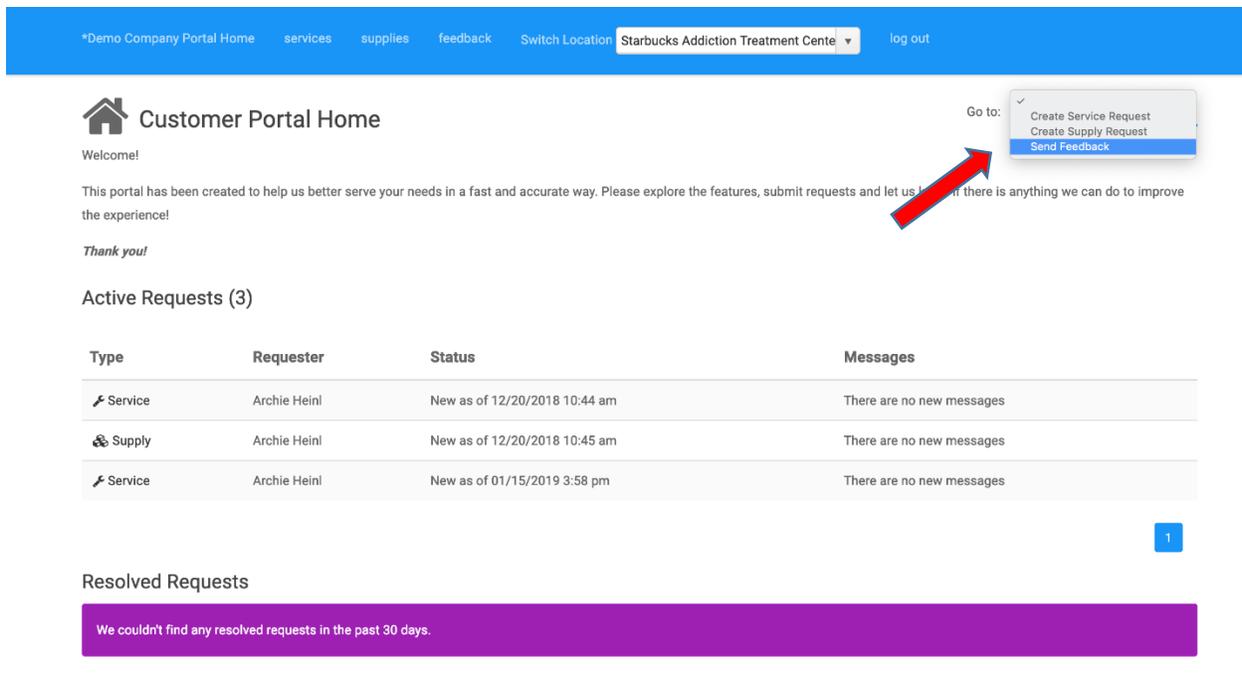


Figure 21

Once you select the “Send Feedback” option either through either step listed above, you will be brought to this window. (Figure 22)

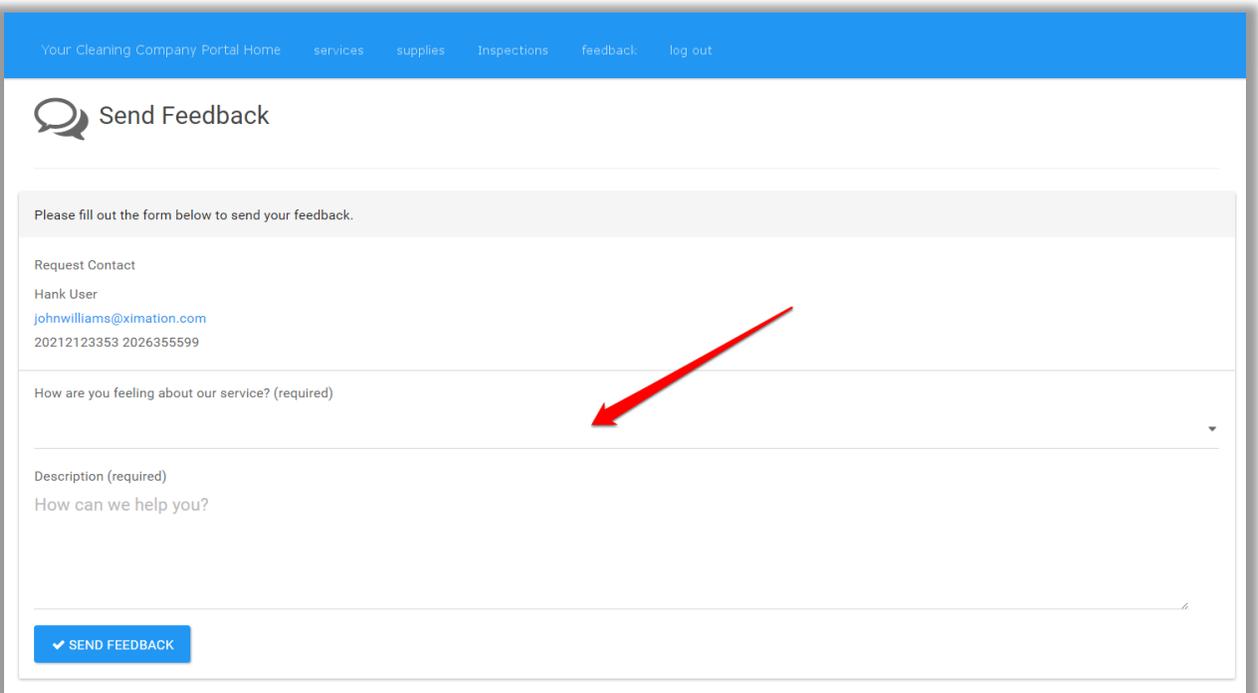
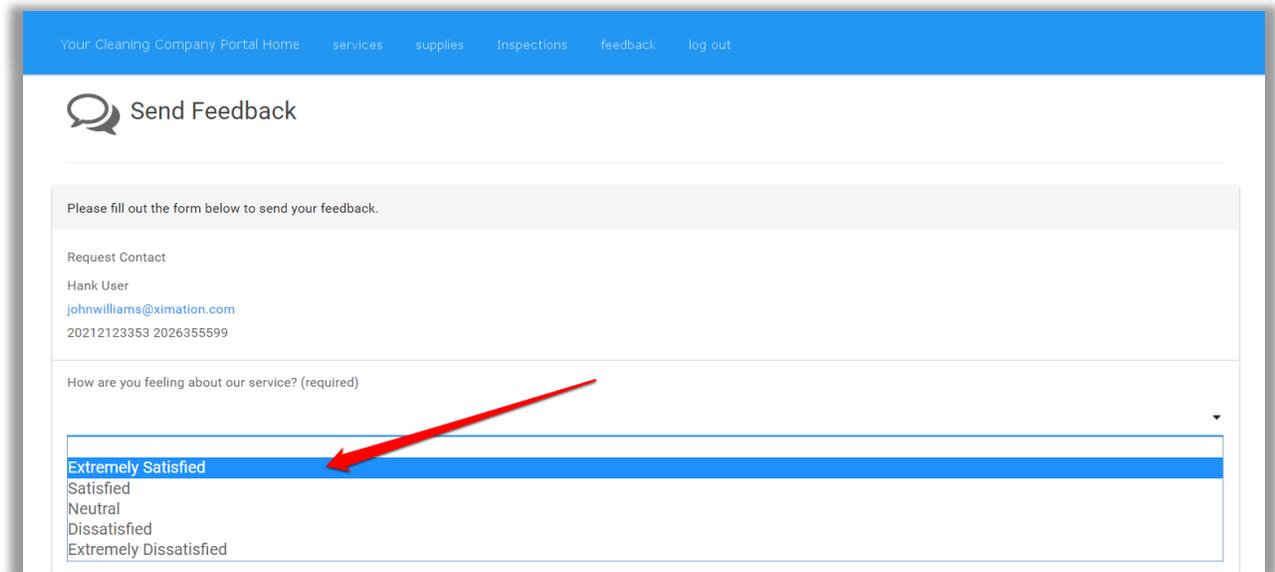


Figure 22

From there, you start the feedback process by selecting your satisfaction level of your service listed in the dropdown as seen in Figure 23.

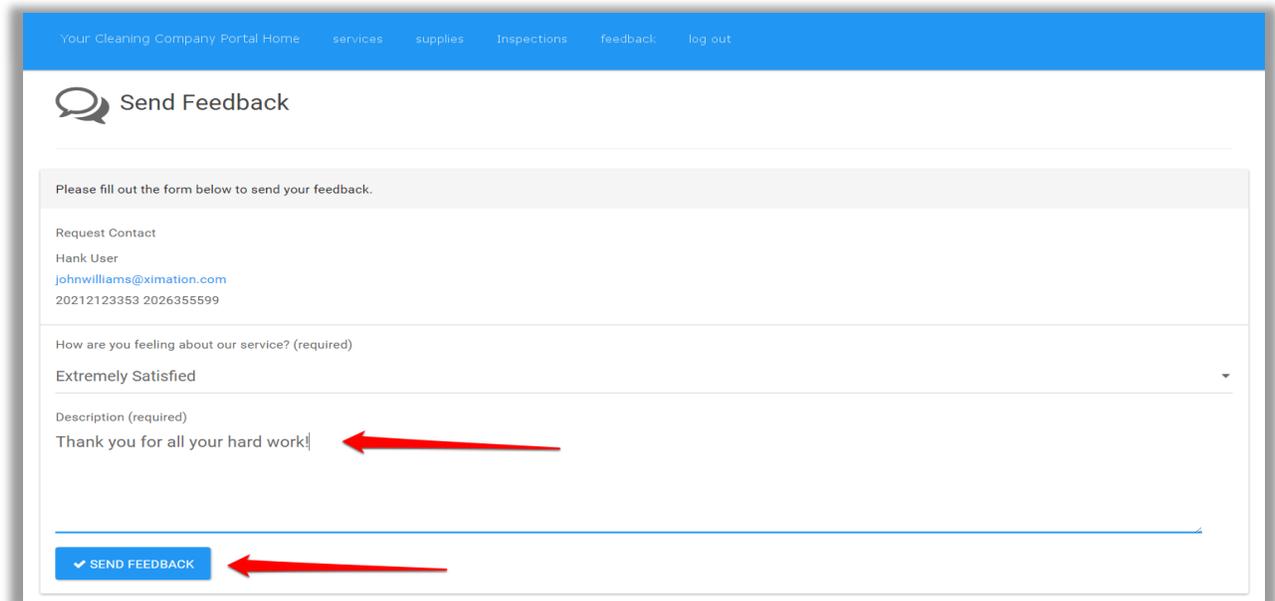


The screenshot shows the 'Send Feedback' form with the following content:

- Header: Your Cleaning Company Portal Home | services | supplies | Inspections | feedback | log out
- Section: Send Feedback
- Text: Please fill out the form below to send your feedback.
- Request Contact: Hank User, johnwilliams@ximation.com, 20212123353 2026355599
- Field: How are you feeling about our service? (required) - A dropdown menu is open, showing options: Extremely Satisfied (highlighted with a red arrow), Satisfied, Neutral, Dissatisfied, and Extremely Dissatisfied.

Figure 10

Finally, Add your comments in regards to the service provided in the discription section as seen below. Once compelted, Simply click the "Send Feedback" button. (Figure 24)



The screenshot shows the 'Send Feedback' form with the following content:

- Header: Your Cleaning Company Portal Home | services | supplies | Inspections | feedback | log out
- Section: Send Feedback
- Text: Please fill out the form below to send your feedback.
- Request Contact: Hank User, johnwilliams@ximation.com, 20212123353 2026355599
- Field: How are you feeling about our service? (required) - Set to 'Extremely Satisfied'
- Field: Description (required) - Contains the text 'Thank you for all your hard work!' (highlighted with a red arrow)
- Button: SEND FEEDBACK (highlighted with a red arrow)

Figure 24

Troubleshooting

If you encounter issues with the Client Portal here are a couple simple ways to trouble shoot and fix the issues:

1. Log out of your portal and back in.
2. Log out of your portal, clear your browser cache (Usually located in you're the settings of your browser), and try to log back in again.
3. If none of those 2 options seem to be working, please contact your cleaning service provider for assistance.