Communicating with Your Customers

Consider the following before enabling the Customer portal:

Do your customers want to communicate through JM Connect Mobile App or would they prefer using a website portal?

JM Connect is communication similar to text messaging and images can be sent.

The portal allows your clients to request services* and supplies, offer feedback, and view inspections if you allow them in the settings.

*Service Requests - In order to provide services your customers can request; those services will have to exist in your JM account. Find the services instructions here.

JM Connect Setup

1. Customers > Manage Portal > Portal Users
2. Ensure the Customer Portal toggle switch is blue
3. +Add Portal User
4. Select Customer and Location for user and fill out details
5. Save
6. It will not automatically send an email to the client. You will see an enable button under the Actions column. When you are ready to send the email, click the enable button to email password setup instructions.

   - This will send the new portal user an email with their login information. We recommend telling the customer that they will get an email from notifications@janitorialmanager.com providing them with their login and a temporary password.

7. Customer can download the JM Connect app. Here is a printable PDF for the client: JM Connect Installation Guide Employees and Clients.pdf

   Note – All employees with a user type of Manager will see client messages in the JM Connect app. If the user type is Employee or No Access, they will not see client messages.

Janitorial Manager Website Portal Setup

1. Customers > Manage Portal > Portal Users
2. Ensure the Customer Portal toggle switch is blue
3. +Add Portal User
4. Select Customer and Location for user and fill out details
5. Save
6. Go to Customers > Manage Locations
7. Find the location you wish to enable the portal on, and click the edit pencil
8. Click the Portal link (located below the "Change customer" drop-down)
9. Click Enable Portal
10. Click the different Enable buttons to enable your preferred portal options for this specific location. *

* Starting Recommendations

When first using the portal and giving your customers access, it is recommended that you start small. You may just want to use the Service Requests, Supply requests (if needed) and Feedback sections. Use the Inspection feature with caution as it provides a lot of information to the customers. As they see the scores your inspectors give to your cleaning jobs, it may reveal problem areas that the customer was unaware of.

Email Notifications

When using the Customer Portal, email notification settings are highly recommended so you and your staff are immediately aware of customer needs and can respond to them quickly. This is valuable for scheduling work, but also for customer peace of mind as you can respond to their requests with a message to make sure they know they have been heard.

1. Go to Customers > Manage Locations
2. Click on the edit pencil of the customer you wish to edit
3. Select the Assignments link
4. In the Assignment/Notification Actions column, edit the staff who are assigned to the location
- The +Assign /x Unassign button will toggle the employee as Assigned/Unassigned to the location
- The + Train / x Not Trained button will toggle the employee as trained/untrained on the location
- When an employee is both assigned and trained on a location, the Notification drop-down will appear, allowing you to choose their style of notifications.
- **Email** - Sends message to the email address listed on the user's General Maintenance page (Employees > Manage Employees > Edit Pencil)
- **Text** - See Email to Text Notifications article - sends a text as email message to the email address listed on the user's general maintenance page (Employees > Manage Employees > Edit Pencil)