Who is eligible to access Dealio?	By default, all users who are allocated to any of the following business line groups are automatically granted 'Read-Only' access to Dealio. *Brokerage *Canada *Work Dynamics *Capital Markets *Retail

I am a new JLL employee. Ho w do I request access to Dealio?

To request access to Dealio, a specific market/business line, report or client/account - your manager should send an approval email to your local Office Security Administrator (OSA). Below is a list of OSAs for each market or business line group.

Markets	Name(s)
Atlanta Region	Joshua Perry
Capital Markets	Megan Tooker
Carolinas Region	Joshua Perry
Central Texas Region	Jennifer Lonsford, Kemi (Folakemi) Olugboyega, Ashton Wilburn, Tiffany (Haesoo) Jeong
Florida Region	Joshua Perry
Heartland Markets	Jennifer Harley, Tiffany (Haesoo) Jeong, Tenzin Kyizom, Jennifer Lonsford, Anna Meister
Houston Region	Kemi (Folakemi) Olugboyega, Jennifer Lonsford
Mid-Atlantic Markets	Anna Gorka, Katrina Thomas
Midwest Region	Jennifer Harley, Tenzin Kyizom
New England Region	Frank Fulhan
New Jersey Region	Sherly Casado, Sarah Horner, Kaley Penichet-Khaw
New York Region	Jason Araya, Sarah Horner, Kaley Penichet-Khaw, Bryan Senkel
North Texas Region	Tiffany (Haesoo) Jeong, Jennifer Lonsford, Ashton Wilburn
Northeast Industrial	Jason Araya, Sherly Casado, Sarah Horner, Kaley Penichet-Khaw
Northern California Region	Edith Aguilar, Yvette Erazo
Pacific Northwest Markets	Edith Aguilar, Yvette Erazo
Rocky Mountain Region	Edith Aguilar, Yvette Erazo
S California Region	Yvette Erazo, Edith Aguilar
Tennessee Region	Joshua Perry

I am a temporary/con tract employee. Ho w do I request

Your manager should send an approval email, along with the market/business line needed to your local Office Security Administrator (OSA).

access to Dealio?	Access for temporary employees will expire after 90-days. To regain access to Dealio, your manager should send an approval email to your local OSA and access will be extended for another 90-days. Note: For a list of OSAs in each market, please refer to the following FAQ: "I am a new JLL employee. How do I request access to Dealio?"

How long does the access request process take?	Dealio receives employee information directly from PeopleSoft 9.2 via a data feed. After a new employee's labor allocation is setup in PeopleSoft 9.2, their information auto-populates in Dealio within 24 hours. You shoud send the request to your local Office Security Administrator (OSA) once the setup in PeopleSoft is complete and they will proceed with the request on the same day.
recently changed by name and now I can no longer access Dealio. How can I regain access to the system?	Dealio uses the same credentials as your JLL network credentials = your User ID and password. If your network User ID has been updated as a result of the name change, please raise a ticket in the ServiceNow portal at (https://jll.service-now.com/sp) and our team will update your login ID in Dealio

I recently changed my name and my old name still appears in the dropdown menu(s). How do I update Dealio to reflect my new name?	Dealio receives employee information directly from PeopleSoft 9.2. To update your employee record in PeopleSoft, please contact your manager, local finance team, or local HR contact. Once the information is updated, it will flow through to Dealio.

How do I request access to Adhoc Reporting?	Please send an email to AdhocReportingTool@am.jll.com.

When I search for a deal, the search results return blank data. How do I gain access to a deal?	Please contact your local Office Security Administrator (OSA) who will verify your access to ensure it includes the market/business line on the deal and grant access accordingly. **Note:** For a list of OSAs in each market, please refer to the following FAQ: "*I am a new JLL employee. How do I request access to Dealio?*".

Can you please add me to the distribution email so that I may receive Dealio announcements?	If you are a non-finance user, please contact your local finance team who will add you to the distribution email.
Can you change the Assignment Type on a posted deal?	We determine the GL account based on Assignment Type. As a result, we cannot change the field once a deal is posted.
I accidently marked a deal as closed (i.e. "Executed/Closed) before adding the correct broker splits and now I can no longer edit the deal. Can you move the deal back to an open status?	Please send an email to your local finance team and they will move the deal to an open status
A 'PY' payment was applied to the Collection Log and now it is missing. How can I restore the payment?	If a manual check is applied with the same check # as the 'PY' payment, it overrides the check. You should add a prefix or suffix to the check # and apply the difference manually to prevent this issue from reoccurring.
How can I remove a duplicate deal from Dealio?	Please contact your local finance team and they will delete the deal if the following criteria applies: 1. The deal status <u>is not</u> 'Posted by Accounting'. 2. The deal does not have any deal cost. **Note**: Only Accounting users can delete deals and documents.
I accidently deleted a deal. How can I restore it?	Please contact your local finance team and they will reactivate the deal.
My broker's market and/or business line is auto-populating incorrectly in the JLL Broker Allocation table. Can you update the market and/or business line?	Dealio receives all Professional labor allocations directly from PeopleSoft 9.2. If a broker's labor allocation is coded incorrectly, please contact their manager, your local finance team, or your local HR contact to update the employee's record in PeopleSoft.
When I click on the 'Print Preview' or 'Create Invoice' button nothing happens. Can you help me create an invoice?	Navigate to the <u>Contact/Survey/Docs</u> tab and make sure the <u>'Contact & Bill-To Address Information</u>' is completed before creating the invoice.

I am trying to create an invoice, but Dealio will not allow me to adjust the Revenue Forecast Dates. How can I create an invoice?	Only finance users can update the Revenue Forecast table (on the General Deal Info tab). To invoice correctly, non-finance users can add multiple due dates on the Due Date/Adjust/Invoice tab.
Why won't the invoice generate the line for the co-broker?	On the General Deal Info tab, you must select a valid co-broker from the 'Outside Broker' dropdown . Your selection cannot be "TBD". You can either search for a co-broker in the 'Deal Allocation' table to confirm if they already exist and then add it to the deal. Or you can add a new co-broker to the deal by performing the following steps: 1. Go to the 'Deal Allocation' table and click on the **Add/Edit** button. 2. In the 'Add/Edit Commission Allocation' window, click on the *Add/Search Co-Broker* hyperlink. 3. In the 'Search Outstide Broker' section, click **Add**. 4. Enter the co-broker details in each field and select **OK**. Close the window. 5. In the 'Commission Allocation Details' table, click **Add**. 6. Select "Outside Broker" from the 'Type' dropdown. 7. Complete the percentage (%) field **or** Amount field, and enter Comments (if applicable). 8. In the 'Outside Broker' dropdown, select the applicable co-broker. 9. Click **Save**.
How do I amend the address of a Bill-To Customer?	If a customer needs to be billed at a new or additional address/location: • On the General Deal Info tab, select one of the existing Bill-To Customer IDs and Save • Naviage to the Contact/Survey/Docs tab and edit the "Contact & Bill-To Address Information".
How do I create a new holdback account in Dealio?	Please raise a ticket in the ServiceNow portal (https://jll.service-now.com/sp) and identify the type of holdback account in your email request. (e.g. Holdback Types = Broker Holdback, Non-Commissionable, or Commission Support Bonus Pool)

The Recoverable Project ID is still pending approval. Who should I contact?	Please contact the Capital Markets Project Team at CMG.Projects@am.jll.com.

When I run a report, the Professional filter is blank. How do I generate my report?	Make sure your 'Broker Market' selection does not include the "All" value and the individual markets (i.e. All, AM1400, AM1401). You must select either the "All" value or the individual markets to view the list of Professionals. **Note**: The same logic applies when selecting the Business Line(s) parameter. You cannot select the "All" value and the individual business lines at the same time.

When I run a report, I do not see my broker in the Professional filter. How do I get my broker added to the filter?	Please reach out to your local Office Security Administrator (OSA) who will verify and update your access as appropriate.. **Note:** For a list of OSAs in each market, please refer to the following Access FAQ: "*I am a new JLL employee. How can I request access to Dealio?*".

I get an error message or blank data when I run a report. How do generate my report?	Try the following options: 1. Make sure your 'Broker Market' selection does not include the "All" value and the individual markets (i.e. All, AM1400, AM1401). You must select either the "All" value or the individual markets to run the report with data. (Note: The same logic applies when selecting the Business Line(s) parameter. You cannot select the "All" value and the invidual business lines at the same time. Or 2. If you are running a report by using a profile saved prior to the PeopleSoft 9.2 chartfield conversion (i.e. January 2019), your report might be pulling in old 8.4 chartfield values (i.e. Operating Units vs. Business Lines). Add the parameters manually and run the report again. If the problem continues, please raise a ticket in the ServiceNow portal (https://jll.service-now.com/sp) and include a screenshot of the parameters used to run the report.

When I try to run a report, it takes a long time to load. How do I generate my report?	Try the following options: 1. Clear the cache in the I.E. browser as follows:

* On your keyboard, press Ctrl + Shift + Delete.

* Deselect "Preserve Favorites websites data" checkbox.

* Click on "Temporary Internet files and websites files" checkbox.

* Click on "Cookies and website data' checkbox.

* Click on "History" checkbox.

* Click on the Delete button.

* Close/Re-open the I.E. browser and run the report again.

Or

2. Try running the report in the Google Chrome browser.

If the problem continues, please raise a ticket in the ServiceNow portal (https://jll.service-now.com/sp) and include a screenshot of the parameters used to run the report.

I am trying to do expenses in PeopleSoft and I cannot find my deal. Can you add	In Dealio, make sure a valid Sold-To Customer is populated in the field. It cannot be 'New Client'. Once a valid customer is saved to the deal, the LMProject

the deal so that I can do my expense report?	(i.e. LM123456) is activated in PeopleSoft and you can do expenses.
How do I add a new property to Dealio? or My property was in Dealio and now it is missing. How do I add it to Dealio?	If you do not see your property in the Property #/Name lookup table, please submit a setup request to NewPropertySetup@am.jll.com. Include the following information in your email request: *Location Code = Physical address of the building. *Description = Building Name (if applicable). Once the location code is setup in PeopleSoft, please allow up to 24 hours for the information to be active in Dealio. **Note:** If you submitted a property setup request prior to the PeopleSoft 9.2 conversion (April 2018), the property may not have been converted from PeopleSoft 8.4 to 9.2. As a result, you will not see the property/location code in Dealio and must submit a new setup request to the New Property Setup (NPS) Team.
How do I update the property details in Dealio (i.e. name, address)?	Please send your change request to NewPropertySetup@am.jll.com.
How do I add a new Sold-To Customer in Dealio?	Sold-To/Bill-To Customers are setup directly in PeopleSoft. To submit a new customer setup request, login in to PeopleSoft, navigate to **Employee Self-Service > Customer Request Form > Add New Value tab**. For instructions on how to fill out the setup form, please visit **JLL Now** in SharePoint. Navigate to **Finance Now** and refer to the **Quick Reference Guides** located at the bottom of the page. https://jll2.sharepoint.com/teams/JLLNow. ***Note**: Please do not request a new customer in cases where a customer exists, but it is not for the address you are looking for. In this case, please select the available customer and update the billing address in the Contact/Survey/Documents tab in Dealio.

I received an approval email after submitting the 'Dealio Customer Request Form' and my customer is not showing up in Dealio. How do I find my customer in Dealio?	If you received an approval email and the customer isn't showing up in Dealio, login to PeopleSoft to confirm if the customer has been setup as follows: 1. Navigate to Customers > Customer Information > General Information 2. Enter the name of the customer in the Name 1 field and click Search 3. If "***No matching values were found***", please allow up to 24 hours for the customer to be activated in both PeopleSoft and Dealio. If the problem continues, please contact the New Customer Setup Team at New.Customer@am.jll.com for further research.

My new customer is setup in PeopleSoft, but it does not appear in Dealio. Can you please advise?	When "*Dealio*" is tagged in PeopleSoft the customer data will sync between the two systems. To confirm if "*Dealio*" is tagged, perform the following steps: 1. Navigate to **Customer > Customer Information > General Information.** 2. Enter the customer id in the **Customer ID** field and click **Search**. 3. Click on Corporate Selection link. 4. Click on General Info Links. 5. Click on Customer Groups. 6. "*Dealio*" should appear in the **Customer Groups by Type** table. If you do not see "*Dealio*" in the table, please send an email to the New Customer team at New.Customer@am.jll.com. Once Dealio is tagged, you should see the customer in the Sold-To Customer lookup table.

How do I change my client's address?	To update the details of an existing Sold-To Customer, complete the amendment form directly in PeopleSoft as follows:

1. Navigate to **Employee Self-Service > JLL Customer Amendment Request > Add New Value tab**.

2. You will receive an acknowledgement via email when the setup request is approved or denied.

For instructions on how to fill out the amendment form, please visit **JLL Now** in SharePoint. Navigate to **Finance Now** and refer to the **Quick Reference Guides** located at the bottom of the page. https://jll2.sharepoint.com/teams/JLLNow

My new client appears in the 'Sold-To Customer field, but the property did not auto-populate in the 'Property #/Name' field. How do I add the property?	As of April 2, 2018, customers are no longer linked to properties in the setup process. As a result, properties will not auto-populate when a Sold-To Customer is added to the deal. * To setup a property (i.e. location), send an email to NewPropertySetup@am.jll.com. * To setup a Sold-To Customer, login to PeopleSoft 9.2 and complete the **Customer Request Form**.
My new customer setup request was denied. Who should I contact?	If your setup request was denied, please contact the New Property Setup Team for further explanation - NewPropertySetup@am.jll.com.
I completed a 'Customer Request Form' (or JLL Customer Amendment Request') and did not receive a confirmation email. Who should I contact about my request?	If you did not receive a confirmation after completing either the 'Customer Request Form' or 'JLL Customer Amendment Form', please contact the New Customer Team at New.Customer@am.jll.com