



FRANCHISE
CLOUD
SOLUTIONS

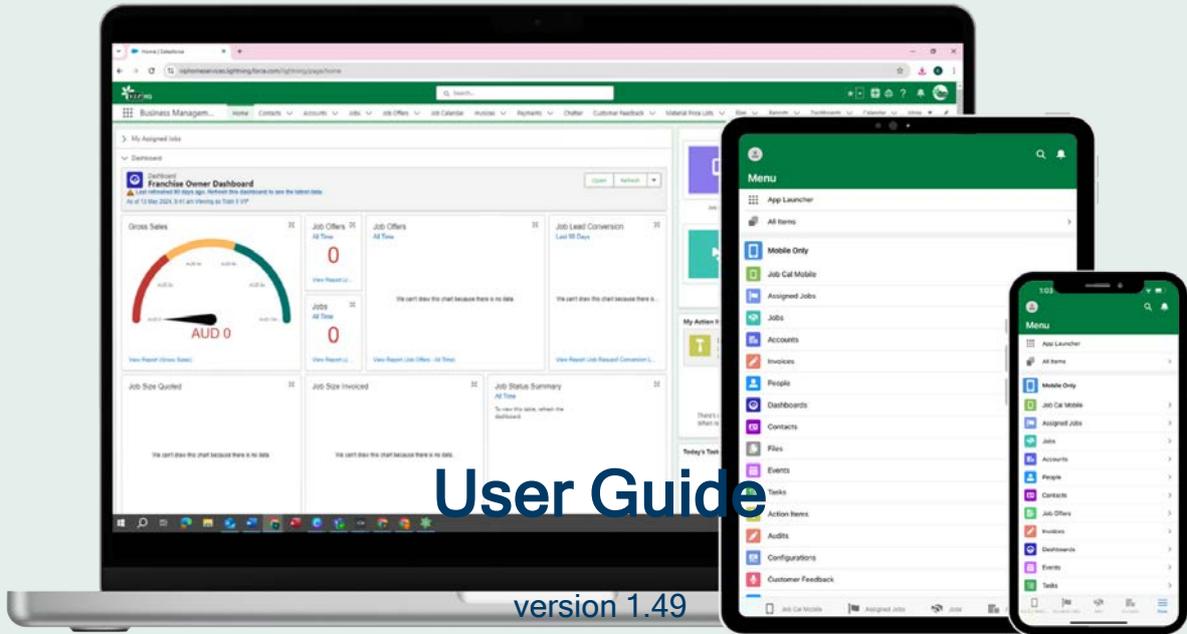
User Guide

version 1.49





Business Management Suite



FRANCHISE
CLOUD
SOLUTIONS

FranchiseOps version 1.198-1.426

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Throughout this guide standard page layouts are shown. Your page layouts may look different based on implementation-specific requirements.

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Getting Started

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Introduction

Welcome to Franchise Cloud Solutions Business Management .

Business Management is designed especially for the franchise industry. It provides an efficient platform for franchise businesses to manage:

- » distributing job opportunities to the optimal franchisee for each job
- » planning and scheduling of Jobs
- » efficient and accurate generation of quotes and invoices
- » collection of payments
- » customer feedback

Business Management will help any franchisee:

- » increase administrative efficiency
- » reduce errors and omissions
- » comply with tax codes

Using this system rather than manual methods has many advantages, including:

- » Information is stored online and is accessible to the team, eliminating misplaced paperwork and notes
- » Data only needs to be entered once, ensuring consistency and preventing errors
- » Quotes, invoices, and calendar entries can be easily adjusted and reissued
- » Lead information is automatically entered into the system, saving time and effort
- » Responding to Leads quickly via text or email by accepting or declining them immediately
- » A streamlined billing process for prompt payments by generating and sending invoices directly within the system
- » Maintaining precise financial records by monitoring payments in real time

Benefits compared to using accounting software alone:

- » Increased profitability insights for individual Jobs
- » Online appointment scheduling to arrange customer visits
- » Synchronisation with accounting software eliminates the need for manual entry and prevents duplicate data and errors
- » Manage ongoing relationships with your customers



Business Management ultimately saves time spent on administration, allowing for more productive work and/or a more flexible lifestyle.



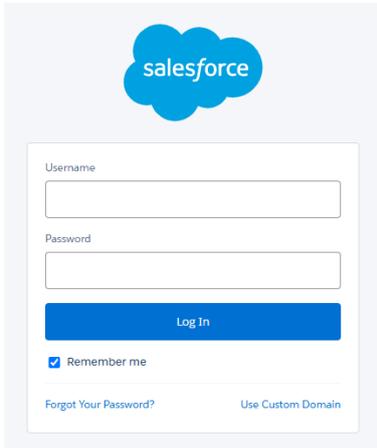
Collaborate with your franchisor to receive better support and achieve your business goals.

Logging In

Upon your initial login, you are required to reset your password and then set up multi-factor authentication (MFA), which can be done on either a desktop or mobile device.

Desktop

1. Go to login.salesforce.com.



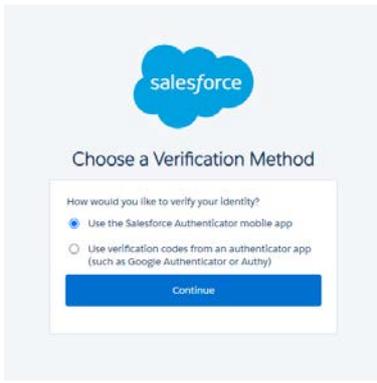
The image shows a screenshot of the Salesforce login page. At the top, there is the Salesforce logo (a blue cloud with the word 'salesforce' inside). Below the logo is a login form with the following elements: a 'Username' label above a text input field, a 'Password' label above a text input field, a blue 'Log In' button, a checked checkbox labeled 'Remember me', and two links at the bottom: 'Forgot Your Password?' and 'Use Custom Domain'.

2. Download the Salesforce Authenticator app on your mobile.

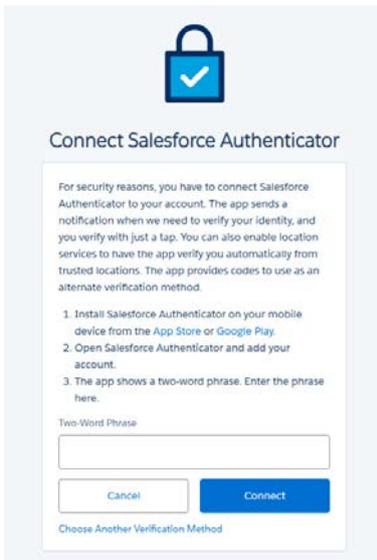


3. On your desktop, enter your `Username` and `Password`. Check the **Remember me** checkbox then tap **Log In**.

4. Select **Use the Salesforce Authenticator mobile app** then tap **Continue**.

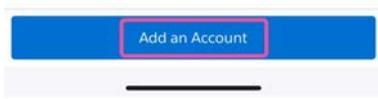


5. The 'Connect Salesforce Authenticator' screen will appear.

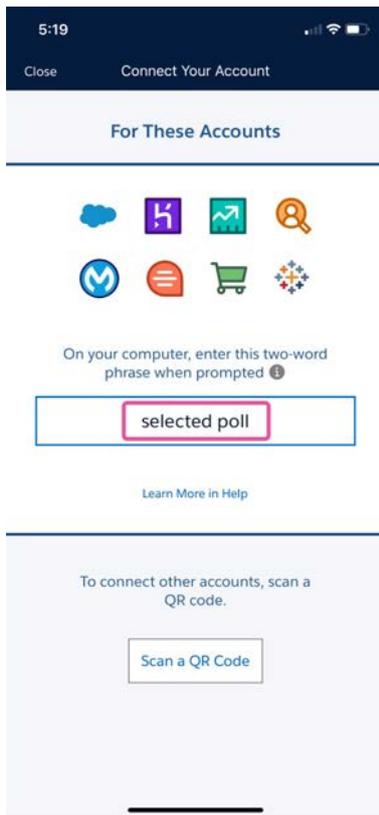


6. Open the Salesforce Authenticator app on your mobile.

7. Tap Add an Account.

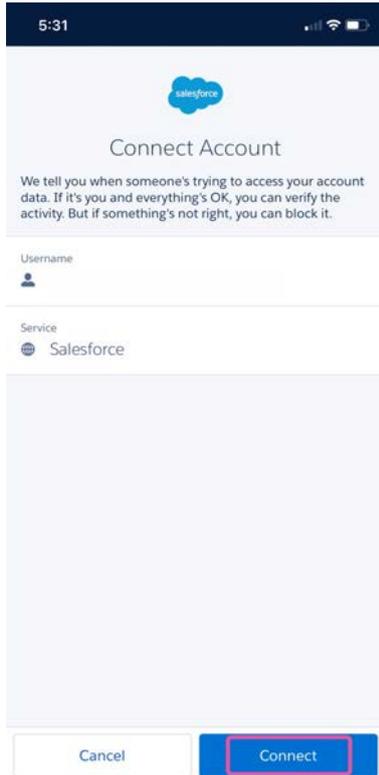


8. A two-word phrase will be displayed.



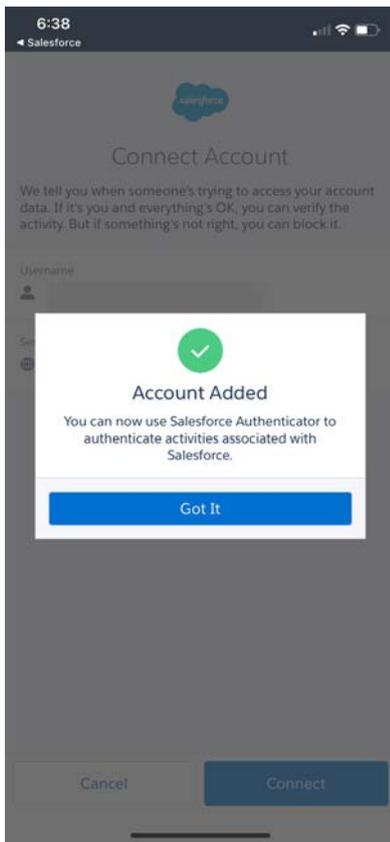
9. Enter the two-word phrase as it appears into the field box on your desktop, and press **Connect**.

10. Your mobile will display the 'Connect Account' page. If the Username and Service is correct, tap **Connect**.



-
11. You will now be logged into Salesforce on your desktop.

You have now set up multi-factor authentication for your Salesforce account.



Mobile

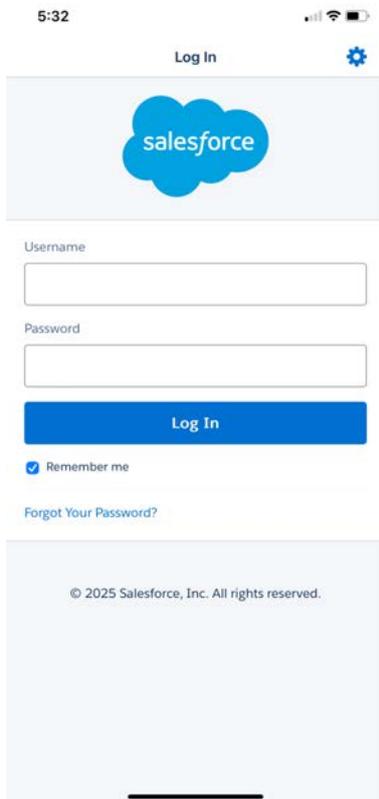
1. Download the Salesforce app.



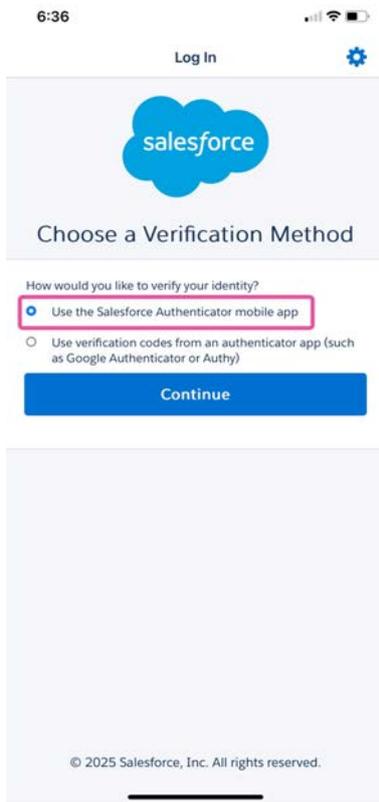
2. Download the Salesforce Authenticator app.



3. Open the Salesforce app.
4. Enter your Username and Password. Check the **Remember me** checkbox then tap **Log In**.



5. Select **Use the Salesforce Authenticator mobile app** then tap **Continue**.



6. The 'Connect Salesforce Authenticator' screen will appear.

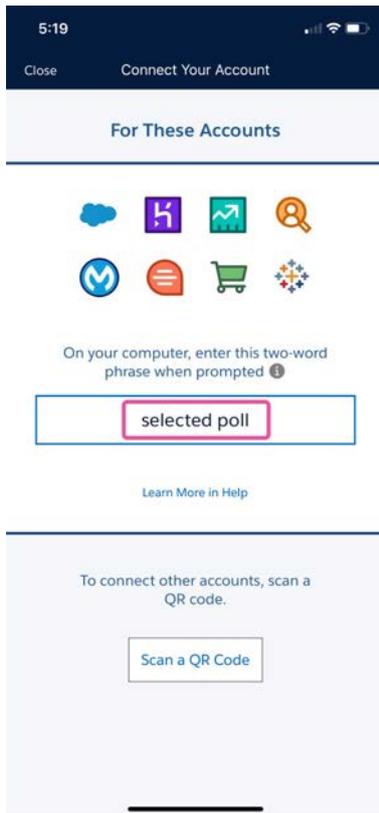


7. Open the Salesforce Authenticator app.

8. Tap Add an Account.



9. A two-word phrase will be displayed. Tap the phrase to copy it to your clipboard.

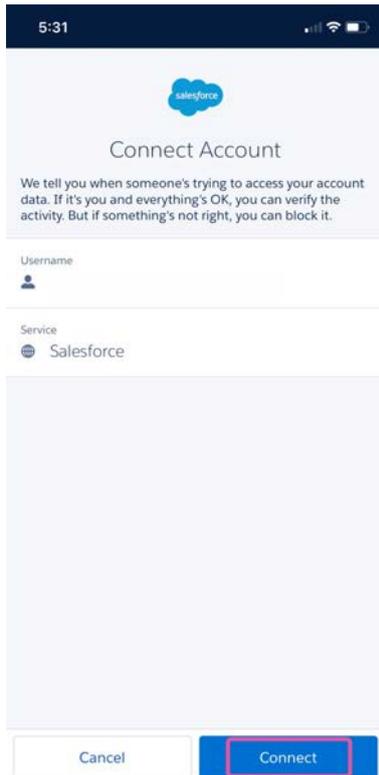


10. Switch to the Salesforce app, paste the two-word phrase into the field box, and press **Connect**.

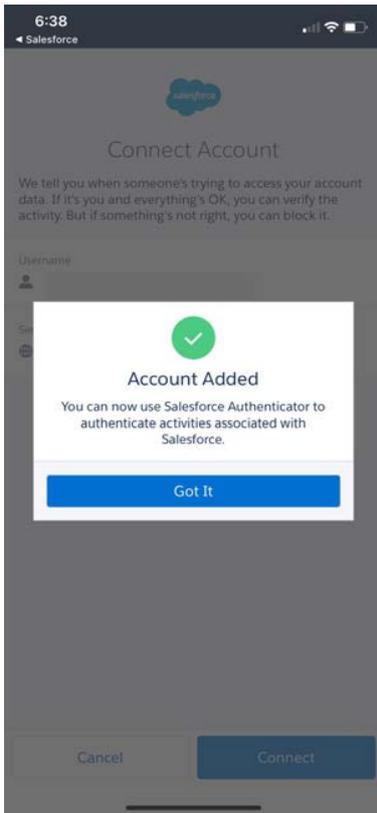
11. You will receive a notification for a connection request from the Salesforce Authenticator app. Tap the notification and you will be taken to the Authenticator app.



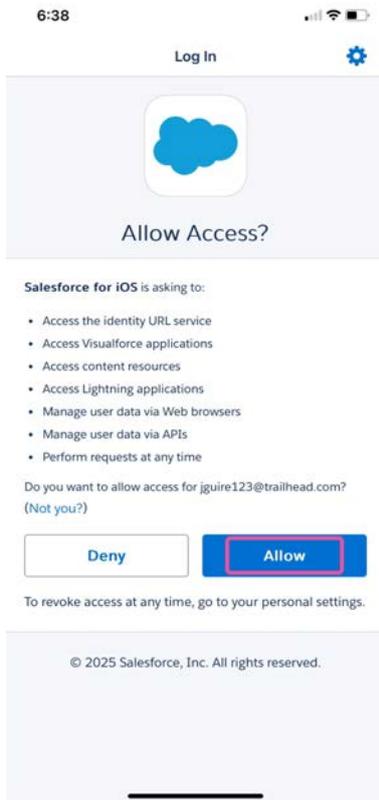
12. The Authenticator app will display the 'Connect Account' page. If the Username and Service is correct, tap **Connect**.



13. You have now set up multi-factor authentication for your Salesforce account.



14. Switch back to the Salesforce app and tap **Allow**.



15. You will now be logged into Salesforce on your mobile.

For further assistance logging into Salesforce, see the [Get Started with Salesforce](#) online help.

Configuring Your Franchise Profile Account

Finding Your Franchise Profile Account

See [“How to locate your Franchise Profile Account” on page xxxiv](#)

What can be configured:

- » Company name
- » Contact information
- » Hours of business
- » Defaults for quotes and invoices
- » Acceptable payment methods
- » Operations base location and the distance you are willing to travel to get to the job
- » Whether you're open for business or currently on vacation
- » Job offers and where they are sent
- » Job allocation parameters
- » Company assets
- » Insurance policies
- » Add contacts related to your company



Some of these settings may be controlled by your franchisor. To update, contact your franchisor's franchisee support line.

To learn how to configure your Franchise Profile account, go to [“Working with your Franchise Profile Account” on page xxxii](#).

The importance of configuring your Franchise Profile Account

Whenever a company opens for business, you need to register important information so that people know how to find you, trust you and trade with you. For example, you need to register your company name, you need to publish your opening hours, contact information and acceptable payment methods.

Within Business Management you also need to register a range of information about your franchise. The Franchise Profile Account represents a profile of all the information that is necessary for your franchise to participate in the franchise network.



If you have newly purchased your franchise, all this information should be correct and up-to-date when you first begin using Business Management. But it's important to know where it is and how to change this information so that you can always keep it up-to-date.

Importing Jobs

To import your existing Job data into the Business Management system, contact your franchisor and follow their established guidelines and procedures. They will provide the necessary resources and support to ensure a smooth and successful data migration process.

Reviewing Jobs

Jobs can be received and accepted in multiple ways. You can accept them through job allocation, you might get a call from a customer, or you might have already accepted the job and are importing the data into Business Management. Either way, there are two important tasks you must complete before you can begin doing the job:

1. Customer Account Management

The ideal time to create a new account is on first contact with the customer. Once you have the customer's information, we recommend you search customer accounts to see whether the person or business is already a customer. This will help you avoid creating duplicate accounts.

This involves searching the existing customer database to check if the customer already has an account. If the customer has a pre-existing account, you can link the job to that account. If the customer is not found to have an existing account, you can use the job to create a new customer account.

See 'Matching customer contact details' under [“First customer contact” on page cxiv](#) to learn how to match the customer or create a new customer account.

A 'business' account type might be more suitable for:

- » A commercial entity with multiple contacts
- » Suppliers
- » Families
- » Rental premises

See [“How to create an account for a business” on page lxxx](#).

2. Appointment Scheduling

Once your job information is correct and linked to an account, it is time to schedule appointments with the customer.

This involves collaborating with the customer to identify suitable dates and times for the required appointments. Once mutually agreeable appointment times are established, you can schedule these appointments within the system.

For scheduling jobs on a desktop, see [“Scheduling Jobs” on page cxcviii](#).

For scheduling jobs on mobile using Job Calendar Mobile, see [“Scheduling a job” on page cccxviii](#).

Daily Use

Here are links to other features that are likely to be utilised daily. These essential features streamline your workflow and enhance your experience, allowing you to leverage Business Management's full potential for managing and optimising your operations.

Receiving Job Requests: [“Introducing job offers” on page lxxxvii](#)

Booking appointments: [“How to schedule a new appointment” on page cxcviii](#)

Daily run sheet on Job Calendar Mobile: [“Viewing today's appointments” on page ccxcvii](#)

Producing and Sending Quotes: [“Job planning and estimation” on page cxxv](#)

Creating a quick quote on mobile: [“Creating a quick quote” on page cccv](#)

Essential invoicing information for Jobs: [“Invoicing a job” on page ccxlix](#)

Invoice Payments: [“Recording payments against an invoice” on page cclxxii](#)



The Franchise Cloud Solutions customer support team can assist you if you need additional help not found in the User Guide. See [“Accessing Help and Support” on page cdlxvi](#).

CHAPTER 3

Working with your Franchise Profile Account

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Understanding your Franchise Profile Account

Whenever a company opens for business, you need to register important information so that people know how to find you, trust you and trade with you. For example, you need to register your company name, you need to publish your opening hours, contact information and acceptable payment methods.

Within Business Management you also need to register a range of information about your franchise. You register this information in an account called a “Franchise Profile Account.” The Franchise Profile Account represents a profile of all the information that is necessary for your franchise to participate in the franchise network.

The Franchise Profile Account is where you register

- » franchise name and contact details
- » hours of business
- » where your base of operations is located and how far you are willing to travel to get to a job
- » payment methods
- » whether you’re open for business or currently on vacation

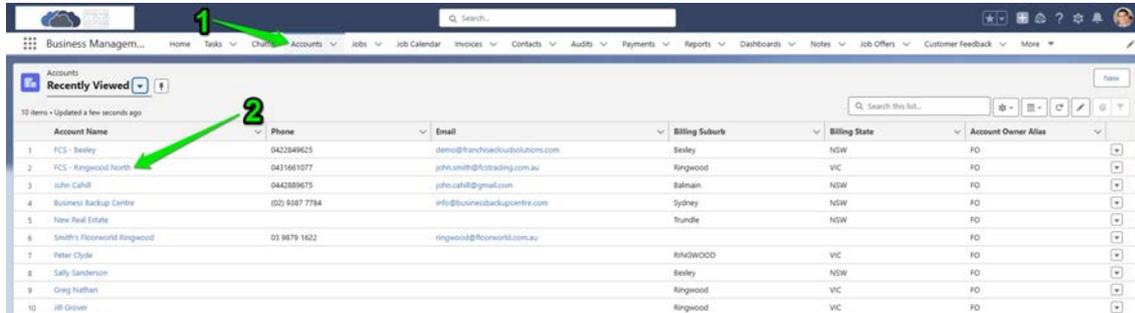


If you have newly purchased your franchise, all this information should be correct and up-to-date when you first begin using Business Management. But it’s important to know where it is and how to change this information so that you can always keep it up-to-date.

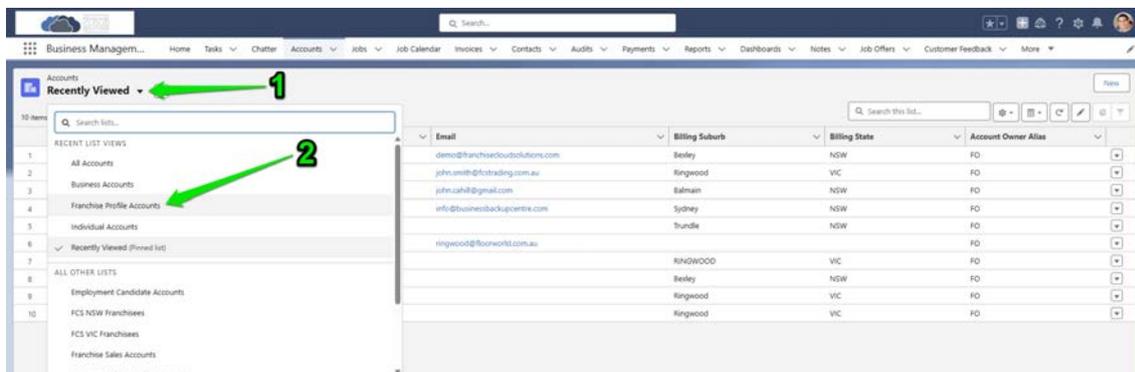
How to locate your Franchise Profile Account

To locate your Franchise Profile Account

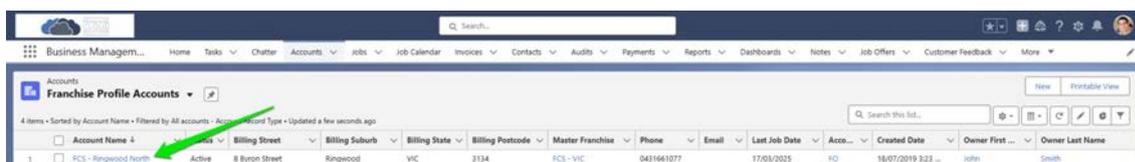
1. Within Accounts, check for your business name.



2. If you can't immediately see it, then switch to the Franchise Profile Accounts list view.



3. You will now see your Franchise Profile Account.



How to set your hours of business

Setting your hours of business affects the times during which you will be offered jobs. Sometimes the Job Allocation System will queue a job offer, and offer it as soon as your hours of business begins for the day. Other times, a job may be offered to another franchisee if their business hours open before yours do.



The Job Allocation System is not influenced by public holidays and will continue to send job offers to franchisees.

To set your hours of business

1. From the **Franchise Profile Account**, select the **Business Information** tab.

The screenshot displays the 'Business Information' tab for the 'FCS - Ringwood North' account. The account status is 'Active'. The primary contact is John Smith, with phone number 0431661077 and email john.smith@fcstrading.com.au. The field manager is Andrew Stevens. The 'Business Information' section includes details for the legal entity (FCS Ringwood Pty Ltd), trading name (FCS Ringwood), and financial system name (FCS Ringwood Pty Ltd T/as FCS Ringwood). The 'Financial Targets' section shows a gross profit target of \$80,000.00 and a break-even point target of 100,000. The 'Territories (1)' section shows one territory, 'Territory - Ringwood', owned by John Smith, which is the master territory for VIC. The 'Business Hours (2)' section shows two business hours: one for Tuesday (07:00 AM to 09:00 PM) and one for Thursday (12:00 AM to 11:00 PM).

Account: FCS - Ringwood North					
Status	Primary Contact	Phone	Email	Field Manager	
Active		0431661077	john.smith@fcstrading.com.au	Andrew Stevens	

Business Information					
Business Information					
Legal Entity Name	FCS Ringwood Pty Ltd		Business Number	86 2738 27328	
Trading Name	FCS Ringwood		Company Number	2738 27328	
Trading Legal Entity			Financial System Name	FCS Ringwood Pty Ltd T/as FCS Ringwood	
Entity Structure			Financial System Name Type	Legal Name T/as Trading Name	

Financial Targets					
Gross Profit Target	\$80,000.00		Break Even Point Target	100,000	
Profit Allowance Target			Break Even Monthly Target	\$433,333.33	

Territories (1)					
1 item • Updated a few seconds ago					
Territory Name	Status	Territory Owner	Active	Master Territory	
Territory - Ringwood	Owned	John Smith	<input checked="" type="checkbox"/>	Master Territory - VIC	

Business Hours (2)					
2 items • Updated a few seconds ago					
Business Hours Number	Day	Start Time	End Time	Type	
BH-000154	Tuesday	07:00 AM	09:00 PM		
BH-000156	Thursday	12:00 AM	11:00 PM		

2. Scroll down to the **Business Hours** section, and **Edit**, **Delete** or create **New** records for your daily business hours.

Business Information

Legal Entity Name: FCS Ringwood Pty Ltd | Business Number: 86 2738 27328

Trading Name: FCS Ringwood | Company Number: 2738 27328

Trading Legal Entity: | Financial System Name: FCS Ringwood Pty Ltd T/as FCS Ringwood

Entity Structure: | Financial System Name Type: Legal Name T/as Trading Name

Financial Targets

Gross Profit Target: \$80,000.00 | Break Even Point Target: 100,000

Profit Allowance Target: | Break Even Monthly Target: \$433,333.33

Territories (1)

Territory Name	Status	Territory Owner	Active	Master Territory
Territory - Ringwood	Owned	John Smith	<input checked="" type="checkbox"/>	Master Territory - VIC

Business Hours (2)

Business Hours Number	Day	Start Time	End Time	Type
BH-000154	Tuesday	07:00 AM	09:00 PM	
BH-000156	Thursday	12:00 AM	11:00 PM	

When a **New** record is created, the **New Business Hours** dialog box displays.

3. Leave the record type as **Contact Hours** and press **Next**.

New Business Hours

Select a record type

Contact Hours

Working Hours

The **New Business Hours: Contact Hours** dialog box displays.



Only ever set **Contact Hours**. The job allocation system does not recognize **Working Hours**.

4. Complete the details for the new **Contact Hours**, then press **Save**, or **Save & New** if you need to create another record.

New Business Hours: Contact Hours

* = Required Information

Information

Business Hours Number

* Account

* Day

* Start Time

* End Time

System Information

Currency Record Type

5. Your **Business Hours** are now updated.

 **Business Hours (3)**
3 items • Sorted by Day • Updated a few seconds ago

	<input type="checkbox"/> Business Hours Number	Day ↑	Start Time
1	<input type="checkbox"/> BH-000160	Monday	07:00 AM
2	<input type="checkbox"/> BH-000154	Tuesday	07:00 AM
3	<input type="checkbox"/> BH-000156	Thursday	12:00 AM

[View All](#)

How to indicate temporary unavailability

Whether it is holidays, temporary sickness or a huge project causing you to be unavailable for new job offers, you can indicate unavailability to receive new job offers. You can also redirect any job offers that would have been received to another franchise. This can be useful where franchisees have agreed to cover each other during planned vacation leave.



If you want to redirect job offers to another franchisee, contact your field manager to do this for you.

To indicate that a franchise is unavailable to receive job offers

- » On the **Franchise Profile Account**, under the **Operating Settings** tab, locate the **Unavailable** field and tick the checkbox.

The screenshot shows the 'Operating Settings' tab for the account 'FCS - Ringwood North'. The 'Unavailable' checkbox is checked and highlighted with a green box. A green arrow points to the 'Operating Settings' tab.

Account: FCS - Ringwood North			
Status: Active	Primary Contact	Phone: 0431661077	Email: john.smith@fcstrading.com.au
			Field Manager: Andrew Stevens
Details Jobs & Accounts Operating Settings Business Information Files & Notes History			
▼ Job Allocation Information			
Auto Accept Owned Offers	<input checked="" type="checkbox"/>		Unavailable <input checked="" type="checkbox"/>
No Timeout	<input type="checkbox"/>		Unavailable From
Notification Preference	2-Way SMS & Email		Unavailable To
Notification Contact	John Smith		Territory Only <input type="checkbox"/>
Notification SMS	0431661077		Territory Only Start Date
Notification Email			Territory Only End Date
Off System	<input type="checkbox"/>		Timezone: Australia/Sydney GMT+1000
▼ Location Settings			
Street	12 Wonga Rd	Max Travel Distance	100
Suburb	Ringwood	Travel Distance Origin	-37.799199, 145.23593
State	VIC	Geo-code Accuracy	ROOFTOP
Postcode	3134		

To indicate that a franchise is unavailable to receive job offers from predetermined start and end dates

» Enter the Unavailable From and the Unavailable To dates.

Account
FCS - Ringwood North

Status: Active Primary Contact: Phone: 0431661077 Email: john.smith@fcstrading.com.au Field Manager: Andrew Stevens

Details Jobs & Accounts **Operating Settings** Business Information Files & Notes History

▼ Job Allocation Information

Auto Accept Owned Offers	<input checked="" type="checkbox"/>	✎	Unavailable	<input type="checkbox"/>	✎
No Timeout	<input type="checkbox"/>	✎	Unavailable From	7/04/2025	✎
Notification Preference	2-Way SMS & Email	✎	Unavailable To	20/04/2025	✎
Notification Contact	John Smith	✎	Territory Only	<input type="checkbox"/>	✎
Notification SMS	0431661077	✎	Territory Only Start Date		✎
Notification Email		✎	Territory Only End Date		✎
Off System	<input type="checkbox"/>	✎	Timezone	Australia/Sydney GMT+1000	✎

▼ Location Settings

Street	12 Wonga Rd	✎	Max Travel Distance	100	✎
Suburb	Ringwood	✎	Travel Distance Origin	-37.799199, 145.23593	✎
State	VIC	✎	Geo-code Accuracy	ROOFTOP	✎
Postcode	3134	✎			



The Unavailable checkbox will be switched on once the Unavailable From date is reached. If the Unavailable From date is set to today's date, it will be switched on overnight.

How to restrict job offers to your owned territory

It is possible to limit job offers to only those within your franchise territory.



If any dates have been set, franchisees cannot switch off Territory Only.

To restrict a franchise to territory-only offers

- » On the **Franchise Profile Account**, under the **Operating Settings** tab, locate the **Territory Only** field and tick the checkbox.

The screenshot shows the 'Operating Settings' tab for the account 'FCS - Ringwood North'. The 'Territory Only' checkbox is checked and highlighted with a green box. A green arrow points to the 'Operating Settings' tab.

Job Allocation Information	
Auto Accept Owned Offers	<input checked="" type="checkbox"/>
No Timeout	<input type="checkbox"/>
Notification Preference	2-Way SMS & Email
Notification Contact	John Smith
Notification SMS	0431661077
Notification Email	
Off System	<input type="checkbox"/>
Unavailable	<input type="checkbox"/>
Unavailable From	
Unavailable To	
Territory Only	<input checked="" type="checkbox"/>
Territory Only Start Date	
Territory Only End Date	
Timezone	Australia/Sydney GMT+1000

Location Settings	
Street	12 Wonga Rd
Suburb	Ringwood
State	VIC
Postcode	3134
Max Travel Distance	100
Travel Distance Origin	-37.799199, 145.23593
Geo-code Accuracy	ROOFTOP

How to adjust job allocation parameters

You can influence a range of factors that influence which jobs you are offered. By making changes to these parameters, you can influence:

- » the distance you travel
- » whether or not you receive offers exclusively from your territory
- » make yourself unavailable for further offers
- » how you are notified of job offers

To adjust job allocation parameters

1. From the Franchise Profile Account, under the Operating Settings tab, locate the Job Allocation Information and Location Settings sections.

Account: FCS - Ringwood North

Status: Active | Primary Contact: | Phone: 0431661077 | Email: john.smith@fcstrading.com.au | Field Manager: Andrew Stevens

Details | Jobs & Accounts | **Operating Settings** | Business Information | Files & Notes | History

Job Allocation Information

Auto Accept Owned Offers	<input checked="" type="checkbox"/>	✎	Unavailable	<input type="checkbox"/>	✎
No Timeout	<input type="checkbox"/>	✎	Unavailable From		✎
Notification Preference	2-Way SMS & Email	✎	Unavailable To		✎
Notification Contact	John Smith	✎	Territory Only	<input checked="" type="checkbox"/>	✎
Notification SMS	0431661077	✎	Territory Only Start Date		✎
Notification Email		✎	Territory Only End Date		✎
Off System	<input type="checkbox"/>	✎	Timezone	Australia/Sydney GMT+1000	✎

Location Settings

Street	12 Wonga Rd	✎	Max Travel Distance	100	✎
Suburb	Ringwood	✎	Travel Distance Origin	-37.799199, 145.23593	✎
State	VIC	✎	Geo-code Accuracy	ROOFTOP	✎
Postcode	3134	✎			

2. Select any of the Edit buttons to switch into edit mode. Make your change and press Save.

Account: FCS - Ringwood North

Status: Active | Primary Contact: | Phone: 0431661077 | Email: john.smith@fcstrading.com.au | Field Manager: Andrew Stevens

Details | Jobs & Accounts | **Operating Settings** | Business Information | Files & Notes | History

Job Allocation Information

Auto Accept Owned Offers	<input checked="" type="checkbox"/>	✎	Unavailable	<input type="checkbox"/>	✎
No Timeout	<input type="checkbox"/>	✎	Unavailable From		✎
Notification Preference	2-Way SMS & Email	✎	Unavailable To		✎
Notification Contact	John Smith	✎	Territory Only	<input checked="" type="checkbox"/>	✎
Notification SMS	0431661077	✎	Territory Only Start Date		✎
Notification Email		✎	Territory Only End Date		✎
Off System	<input type="checkbox"/>	✎	Timezone	Australia/Sydney GMT+1000	✎



The effect of each of these settings is dependent on choices made during system implementation. Consult the implementation notes or check with your franchise's help desk to understand the effect of each setting.



To configure where email or SMS job offers are sent, See “How to change where job offers are sent” on the next page.

How to change where job offers are sent



SMS is an optional feature offered by Franchise Cloud Solutions. Check with your field manager to see if your organization has licensed SMS Management.

You can control where email and SMS notifications are sent by changing configuration.



You may wish to have both email and SMS sent to your mobile phone, or you may wish for your mobile phone to receive SMS while email goes to an office administrator.

To control where email and SMS notifications are sent

1. Within **Accounts**, look up your business' **Franchise Profile Account**. See “How to locate your Franchise Profile Account” on page xxxiv.
2. Within the **Franchise Profile Account**, under the **Operating Settings** tab, locate the **Job Allocation Information** section.

The screenshot shows the 'Operating Settings' tab for the account 'FCS - Ringwood North'. The 'Job Allocation Information' section is highlighted with a green box. The settings are as follows:

Setting	Value	Action
Auto Accept Owned Offers	<input checked="" type="checkbox"/>	✎
No Timeout	<input type="checkbox"/>	✎
Notification Preference	2-Way SMS & Email	✎
Notification Contact	John Smith	✎
Notification SMS	0431661077	✎
Notification Email		✎
Off System	<input type="checkbox"/>	✎
Unavailable	<input type="checkbox"/>	✎
Unavailable From		✎
Unavailable To		✎
Territory Only	<input checked="" type="checkbox"/>	✎
Territory Only Start Date		✎
Territory Only End Date		✎
Timezone	Australia/Sydney GMT+1000	✎

Notification Preference controls whether the job offer is sent by email, SMS or both.

3. Select the appropriate option from Notification Preference.

Press **Edit**.

The screenshot shows the 'Operating Settings' page with the 'Notification Preference' dropdown menu open. The '2-Way SMS & Email' option is selected, indicated by a green arrow. Other settings include 'Auto Accept Owned Offers' (checked), 'No Timeout' (unchecked), 'Notification Contact' (John Smith), 'Notification SMS' (0431661077), 'Notification Email' (empty), 'Off System' (unchecked), 'Unavailable' (unchecked), 'Unavailable From' (empty), 'Unavailable To' (empty), 'Territory Only' (checked), 'Territory Only Start Date' (empty), 'Territory Only End Date' (empty), and 'Timezone' (Australia/Sydney GMT+1000).

Select your desired communication preference.

The screenshot shows the 'Operating Settings' page with the 'Notification Preference' dropdown menu open. The '2-Way SMS & Email' option is selected, indicated by a green arrow. Other settings include 'Auto Accept Owned Offers' (checked), 'No Timeout' (unchecked), 'Notification Contact' (empty), 'Notification SMS' (empty), 'Notification Email' (empty), 'Off System' (unchecked), 'Unavailable' (unchecked), 'Unavailable From' (empty), 'Unavailable To' (empty), 'Territory Only' (unchecked), 'Territory Only Start Date' (empty), 'Territory Only End Date' (empty), and 'Timezone' (Australia/Sydney GMT+1000).



If SMS options are not available you may not be licensed for SMS Management.

4. If your organization has licensed SMS Management, enter the appropriate mobile phone number into Notification SMS.

Now we need to set the correct notification email.

5. Select the desired Notification Contact then press **Save**.

The screenshot shows the 'Operating Settings' page with the 'Notification Contact' dropdown menu open. The 'John Smith' contact is selected, indicated by a green arrow. The dropdown menu also shows 'Show more results for "John"', 'John Smith FCS - Ringwood North', and '+ New Contact'. Other settings include 'Auto Accept Owned Offers' (checked), 'No Timeout' (unchecked), 'Notification Preference' (2-Way SMS & Email), 'Notification SMS' (empty), 'Notification Email' (empty), 'Off System' (unchecked), 'Unavailable' (unchecked), 'Unavailable From' (empty), 'Unavailable To' (empty), 'Territory Only' (unchecked), 'Territory Only Start Date' (empty), 'Territory Only End Date' (empty), and 'Timezone' (Australia/Sydney GMT+1000).

6. Click the Notification Contact link and check that the **Contact** Email is correct.

The screenshot displays a contact profile for John Smith. At the top, the contact's name and account name are shown. Below this, there are tabs for 'Details', 'Employment', 'Credentials', 'Personal', 'Marketing', and 'Files & Notes'. The 'Details' tab is active, showing two sections: 'Contact Information' and 'Contact Details'. The 'Contact Information' section includes fields for Name, Account Name, Status, Title, Reports To, and Birthdate. The 'Contact Details' section includes fields for Mobile, Phone, Home Phone, and Email. The email address 'john.smith@fcstrading.com.au' is highlighted with a green box.

Contact Information	
Name	John Smith
Account Name	FCS - Ringwood North
Status	Active
Title	
Reports To	
Birthdate	

Contact Details	
Mobile	0431661077
Phone	
Home Phone	
Email	john.smith@fcstrading.com.au

How to set defaults for quotes and invoices

The default hourly rate controls default values that appear within Job Planner, Quote and Invoice pages.

To set your defaults

1. From the Franchise Profile Account, under the Operating Settings tab, scroll down to the Quote & Invoice Information section.

Account: FCS - Ringwood North

Details | Jobs & Accounts | **Operating Settings** | Business Information | Files & Notes | History

Job Allocation Information

- Auto Accept Owned Offers:
- No Timeout:
- Notification Preference: 2-Way SMS & Email
- Notification Contact: John Smith
- Notification SMS: 0431661077
- Notification Email: [edit]
- Off System:
- Unavailable:
- Unavailable From: [edit]
- Unavailable To: [edit]
- Territory Only:
- Territory Only Start Date: [edit]
- Territory Only End Date: [edit]
- Timezone: Australia/Sydney GMT+1000

Location Settings

- Street: 12 Wonga Rd
- Suburb: Ringwood
- State: VIC
- Postcode: 3134
- Max Travel Distance: 100
- Travel Distance Origin: -37.799199, 145.23593
- Geo-code Accuracy: ROOFTOP

Quote & Invoice Information

- Quote Auto Follow Up:
- Default Tax Rate: 10.00%
- Tax Inclusive By Default:
- Default Hourly Rate: \$45.00**
- Default Markup %: 25.0%
- Default Quote Email Template: [edit]
- Default Invoice Stage Plan: [edit]
- Auto Close Job on Final Payment:
- Payment Terms: On Completion
- Accounting Sequence Name: [edit]
- Default Invoice Email Template: [edit]

2. Click the **Edit** button, make your change, then press **Save**.

Account: FCS - Ringwood North

Quote & Invoice Information

- Quote Auto Follow Up:
- Default Tax Rate: 10.00%
- Tax Inclusive By Default:
- Default Hourly Rate: \$45.00 [edit]
- Default Markup %: 25.0%
- Default Quote Email Template: [edit]
- Default Invoice Stage Plan: [edit]
- Auto Close Job on Final Payment:
- Payment Terms: On Completion
- Accounting Sequence Name: [edit]
- Default Invoice Email Template: [edit]

Fields that affect Quotes or Invoices are described below.

Field	Description
Payment Terms	Sets the payment terms that appear on your quote or invoice.
Default Tax Rate	Defines the GST or VAT tax rate set on your quote or invoice.

Field	Description
Auto Close Job on Final Payment	When checked, automatically closes a job where all invoiced moneys have been paid.
Default Markup %	Sets the default markup percentage on any materials used in the Job Planning page.
Default Hourly Rate	Sets the default charge-out rate for labor used in the Job Planning page.

To change the payment methods on invoices

1. From the **Franchise Profile Account**, under the **Operating Settings** tab, scroll down to the **Payment Methods** section.

2. To modify which payment methods you accept, click the **Edit** button to switch into edit mode.

3. Check or uncheck any of the payment methods.

4. Modify any of the account details, then press **Save**.

The screenshot shows a 'Payment Methods' form with the following fields and options:

- Payment Methods:**
 - Cash
 - Direct Deposit
 - Eftpos
 - Interest Free Payment Options
- Bank Account Name:** Commonwealth
- Bank Account BSB:** 063 289 (highlighted with a green box)
- Bank Account Number:** 2938 2832903 28
- PayID:** (empty)

At the bottom right, there are two buttons: 'Cancel' and 'Save'. A green arrow points to the 'Save' button.

How to add a company asset

Company owned assets can be registered against the Franchise Profile Account.

To add an asset to the register

1. From the Franchise Profile Account, select the Business Information tab.

The screenshot shows the 'Business Information' tab selected in the Franchise Profile Account for 'FCS - Ringwood North'. A green arrow points to the 'Business Information' tab. The page displays various details and targets for the business.

Account Details:

- Status: Active
- Primary Contact: John Smith (Phone: 0431661077, Email: john.smith@fcstrading.com.au)
- Field Manager: Andrew Stevens

Business Information Tab:

- Business Information:**
 - Legal Entity Name: FCS Ringwood Pty Ltd
 - Trading Name: FCS Ringwood
 - Trading Legal Entity: [Info icon]
 - Entity Structure: [Edit icon]
 - Business Number: 86 2738 27328
 - Company Number: 2738 27328
 - Financial System Name: FCS Ringwood Pty Ltd T/as FCS Ringwood
 - Financial System Name Type: Legal Name T/as Trading Name
- Financial Targets:**
 - Gross Profit Target: \$80,000.00
 - Profit Allowance Target: [Edit icon]
 - Break Even Point Target: 100,000
 - Break Even Monthly Target: \$433,333.33
- Territories (1):**
 - 1 item • Updated a few seconds ago
 - Table with columns: Territory Name, Status, Territory Owner, Active, Master Territory
 - Row 1: Territory - Ringwood, Owned, John Smith, [Active], Master Territory - VIC
- Business Hours (2):**
 - 2 items • Updated a few seconds ago
 - Table with columns: Business Hours Number, Day, Start Time, End Time, Type
 - Row 1: BH-000154, Tuesday, 07:00 AM, 09:00 PM
 - Row 2: BH-000156, Thursday, 12:00 AM, 11:00 PM

2. Scroll down to the **Assets Register** section and press **New**.

The screenshot shows the 'FCS - Ringwood North' account interface. It features several sections:

- Territories (1)**: A table with columns for Territory Name, Status, Territory Owner, Active, and Master Territory. One item is listed: 'Territory - Ringwood'.
- Business Hours (3)**: A table with columns for Business Hours Number, Day, Start Time, End Time, and Type. Three items are listed for Monday, Tuesday, and Thursday.
- Material Price Lists (1)**: A table with columns for Material Price List Name, Supplier, Owner Alias, and Created Date. One item is listed: 'Disposal List'.
- Assets Register (0)**: This section is highlighted with a green box, and a green arrow points to the 'New' button in its top right corner.

At the bottom of the interface, there is a 'System Information' section.

The **New Asset Register** dialog box appears.

- Complete the details for the new asset then press **Save**, or **Save & New** if you need to add another asset.

New Asset Register

* = Required Information

Information

* Asset Name Currency

Asset Number

Make Model

Serial Number

Purchase Date

Warranty Expiry

Purchased From

Asset Details

Purchase Price

Reminder Date

Status

* Account

- The new asset is now added to the register.

Assets Register (1) 1 item • Updated a few seconds ago

<input type="checkbox"/>	Purchase Date	Asset Name	Asset Details	Purchase P...	Make Model	Warranty Expiry	
1	<input type="checkbox"/> 14/01/2025	Andrew's Mobile Phone	54-677892-317464-0	\$989	iPhone 15	13/01/2026	<input type="text"/>

[View All](#)



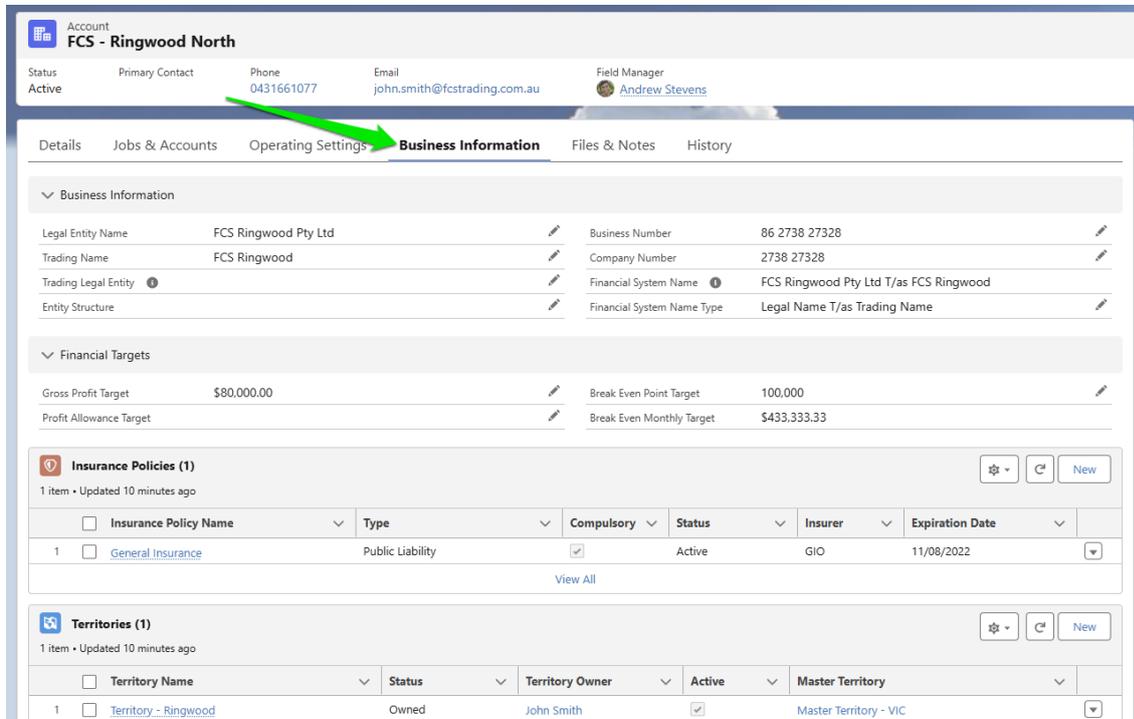
If you insert a reminder date for an asset, you will receive an email on the reminder date notifying you to take action.

How to add an insurance policy

Insurance policies can be added to a list of policies held against the Franchise Profile Account.

To add an insurance policy

1. From the Franchise Profile Account, select the **Business Information** tab.



Account
FCS - Ringwood North

Status: Active | Primary Contact: | Phone: 0431661077 | Email: john.smith@fcstrading.com.au | Field Manager: Andrew Stevens

Details | Jobs & Accounts | Operating Settings | **Business Information** | Files & Notes | History

Business Information

Legal Entity Name	FCS Ringwood Pty Ltd	Business Number	86 2738 27328
Trading Name	FCS Ringwood	Company Number	2738 27328
Trading Legal Entity		Financial System Name	FCS Ringwood Pty Ltd T/as FCS Ringwood
Entity Structure		Financial System Name Type	Legal Name T/as Trading Name

Financial Targets

Gross Profit Target	\$80,000.00	Break Even Point Target	100,000
Profit Allowance Target		Break Even Monthly Target	\$433,333.33

Insurance Policies (1) [Filter] [Clear] [New]

1 item • Updated 10 minutes ago

Insurance Policy Name	Type	Compulsory	Status	Insurer	Expiration Date
1 <input type="checkbox"/> General Insurance	Public Liability	<input checked="" type="checkbox"/>	Active	GIO	11/08/2022

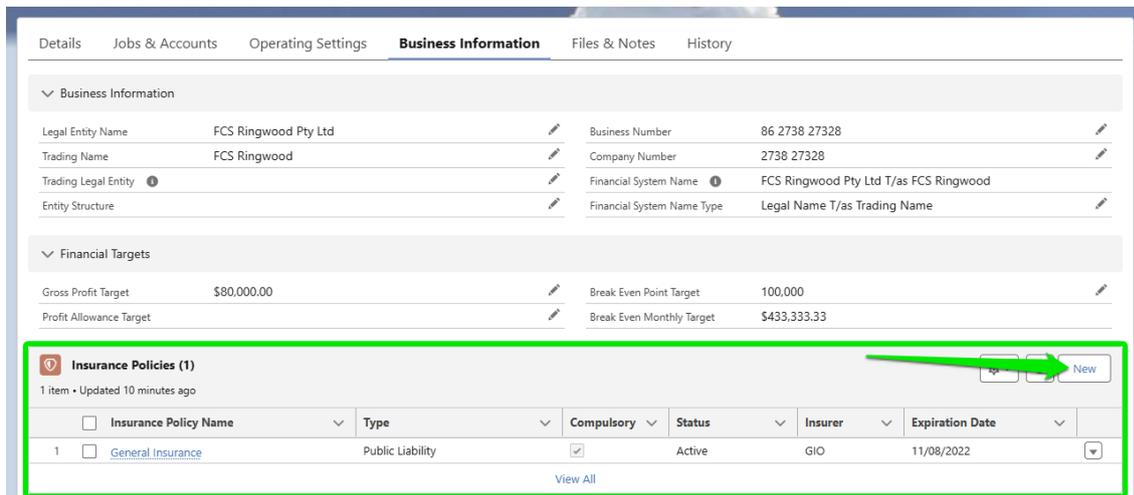
[View All](#)

Territories (1) [Filter] [Clear] [New]

1 item • Updated 10 minutes ago

Territory Name	Status	Territory Owner	Active	Master Territory
1 <input type="checkbox"/> Territory - Ringwood	Owned	John Smith	<input checked="" type="checkbox"/>	Master Territory - VIC

2. Locate the **Insurance Policies** section and press **New**.



Details | Jobs & Accounts | Operating Settings | **Business Information** | Files & Notes | History

Insurance Policies (1) [Filter] [Clear] [New]

1 item • Updated 10 minutes ago

Insurance Policy Name	Type	Compulsory	Status	Insurer	Expiration Date
1 <input type="checkbox"/> General Insurance	Public Liability	<input checked="" type="checkbox"/>	Active	GIO	11/08/2022

[View All](#)

The New Insurance Policy dialog box appears.

- Complete the details for the new policy then press **Save**, or **Save & New** if you need to add another insurance policy.

New Insurance Policy

* = Required Information

Information

*Insurance Policy Name: Workers Compensation

Status: Active

Insurer: CGU

Expiration Date: 5/04/2026

*Account: FCS - Ringwood North

Type: Public Liability

Compulsory:

Days Until Expiration Date: *This field is calculated upon save*

System Information

Created By: Last Modified By:

Currency: AUD - Australian Dollar

- The new policy is now added to the list.

Insurance Policies (2) 2 items • Updated a few seconds ago

	Insurance Policy Name	Type	Compulsory	Status	Insurer	Expiration Date
1	General Insurance	Public Liability	<input checked="" type="checkbox"/>	Active	GIO	11/08/2022
2	Workers Compensation	Public Liability	<input checked="" type="checkbox"/>	Active	CGU	05/04/2026

[View All](#)



You will be sent an email 30 days prior to the expiry of each insurance policy reminding you to renew the policy.

CHAPTER

3

Finding Information

How to search for information	lv
How to browse records using List Views	lx
Key list views	lxiii
How to set a default list view	lxiv
How to customize a list view	lxvi
How to create your own list view	lxix
How to add columns to a list view	lxxii
How to share list views	lxxv

How to search for information

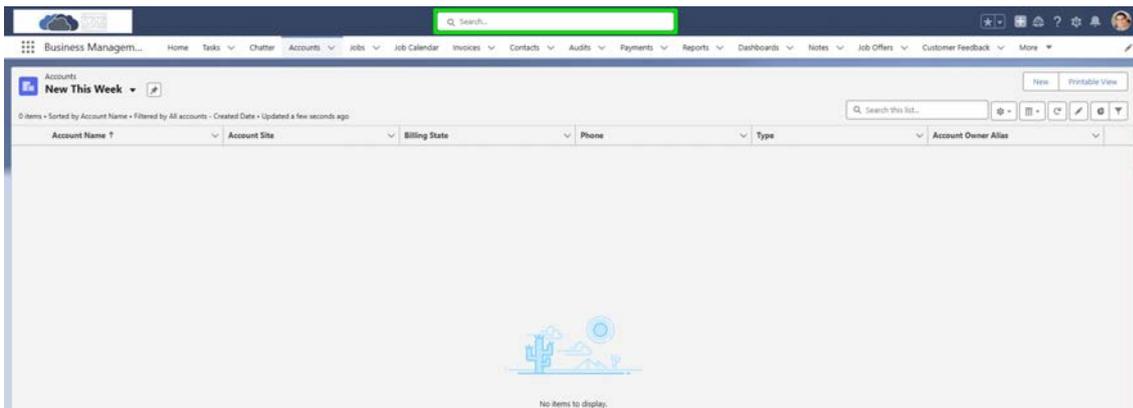
Salesforce provides a search mechanism that searches across many different types of records. This is useful when you know you have information in your system. It can also be useful to see if you have information in your system.



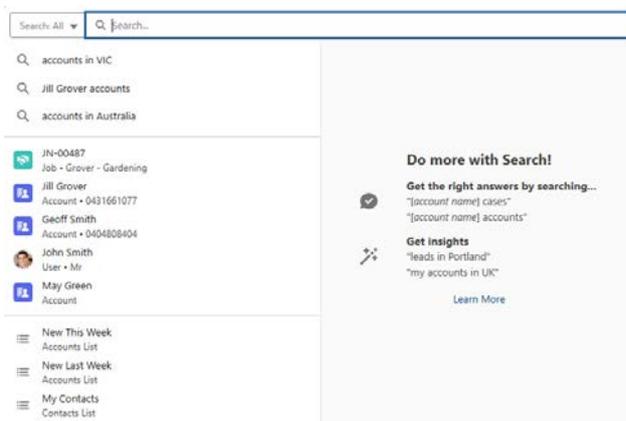
Let's say someone contacts you on the phone. You can use the search to see if they are an existing customer.

How to search for information

1. Locate the **Search** box at the top of the Salesforce page.

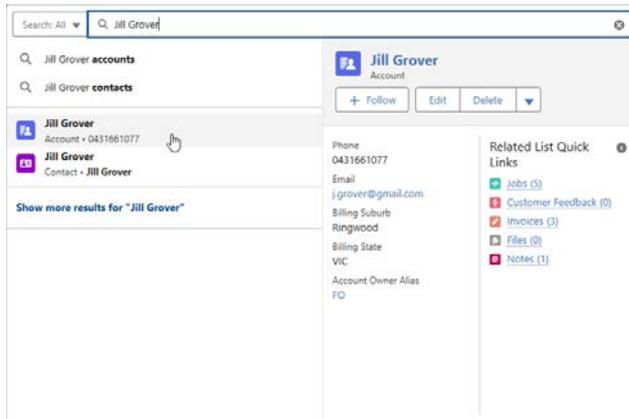


2. Click the **Search** box and you will see suggestions for searches along with recently viewed objects.

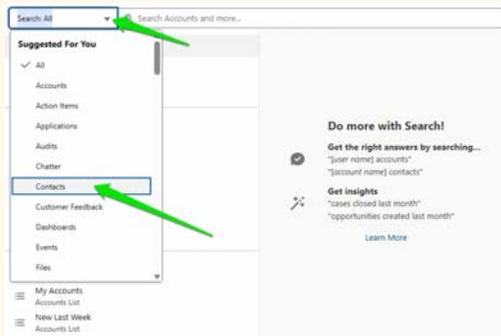


Access the search box by using the "/" keyboard shortcut.

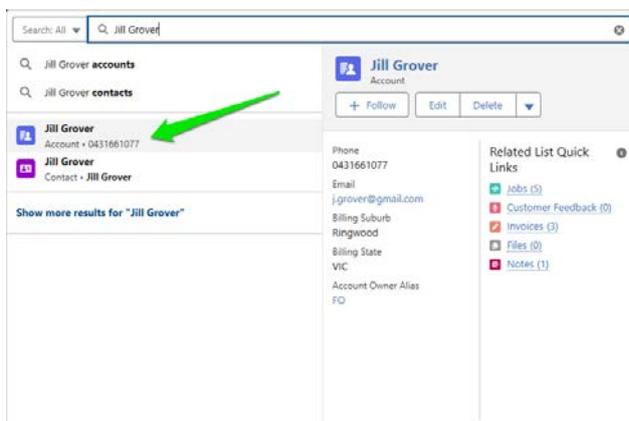
3. Enter some identifying information, such as a name, phone number, job number, invoice number, etc. Notice that the search results often consist of multiple types of records. You can easily identify which type of record you are most interested in. Hover over the record to see information from the record's Details page.



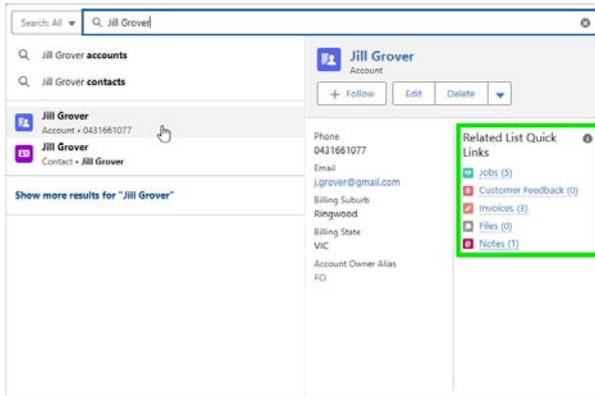
To narrow your search results to a specific object (e.g., Account, Contact), select the object from the dropdown menu located next to the search box.



4. If you have located the desired record, click on it to view its page.

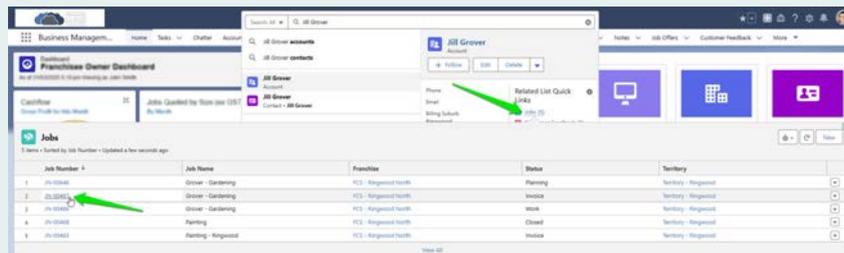


5. After finding the record, you can perform actions directly from the search box.
- » You can access links that are found in the tabs on the record.

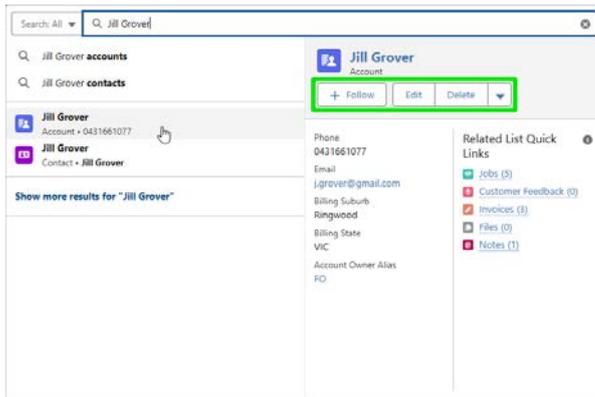


Access a list of Jobs from the search box

After entering the customer's name, you can view a list of Jobs on their Account. To open a specific job, move your mouse over the **Jobs Related List Quick Link** and select the desired job from the list.

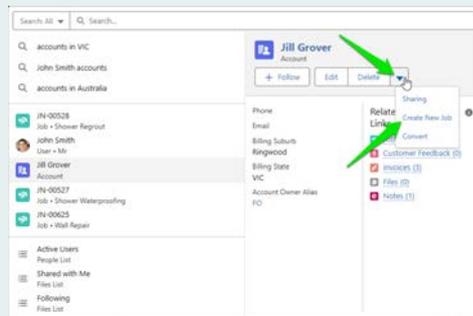


» You can access actions that are found on the record page.



Create a new Job from the search box

After entering the customer's name, hover over their account and select the dropdown menu to reveal more actions. Select **Create New Job**. The Create New Job dialog box opens.



- If the record you're attempting to locate does not appear in the search results, you might try hitting your **Enter** key (Windows) or **Return** key (MacOS) to see a far more detailed listing of search results.

The screenshot shows the Business Management software interface with search results for 'Jill Grover'. The search bar at the top contains 'Jill Grover'. The search results are categorized into Jobs, Contacts, Accounts, and Files. A 'Don't see your result?' message is displayed at the bottom of the search results section.

Jobs
5 Results - Sorted by Relevance

Job Number	Job Name	Customer	Franchise	Status	Territory
JH-00485	Grover - Gardening	Jill Grover	FCS - Ringwood North	Planning	Territory - Ringwood
JH-00486	Grover - Gardening	Jill Grover	FCS - Ringwood North	Work	Territory - Ringwood
JH-00487	Grover - Gardening	Jill Grover	FCS - Ringwood North	Invoice	Territory - Ringwood
JH-00644	gardens3		FCS - Ringwood North	Closed	Territory - Ringwood
JH-00643	gardens2		FCS - Ringwood North	Invoice	Territory - Ringwood

Contacts
1 Result

Name	Account Name	Phone	Email	Mobile	Mailing Suburb	Mailing State	Contact Ow...	Created Date
Jill Grover	Jill Grover	0431661077	jill.grover@gmail.com	0431661077	Ringwood	VIC	FO	21/01/2020 2:03 am

Accounts
1 Result

Account Name	Phone	Email	Billing Suburb	Billing State	Account Owner Alias
Jill Grover	0431661077	j.grover@gmail.com	Ringwood	VIC	FO

Files
1 Result

Title	Size	File Extension	Last Modified Date	Owner
JH-00054	20KB	pdf	21/01/2023 8:26 pm	John Smith

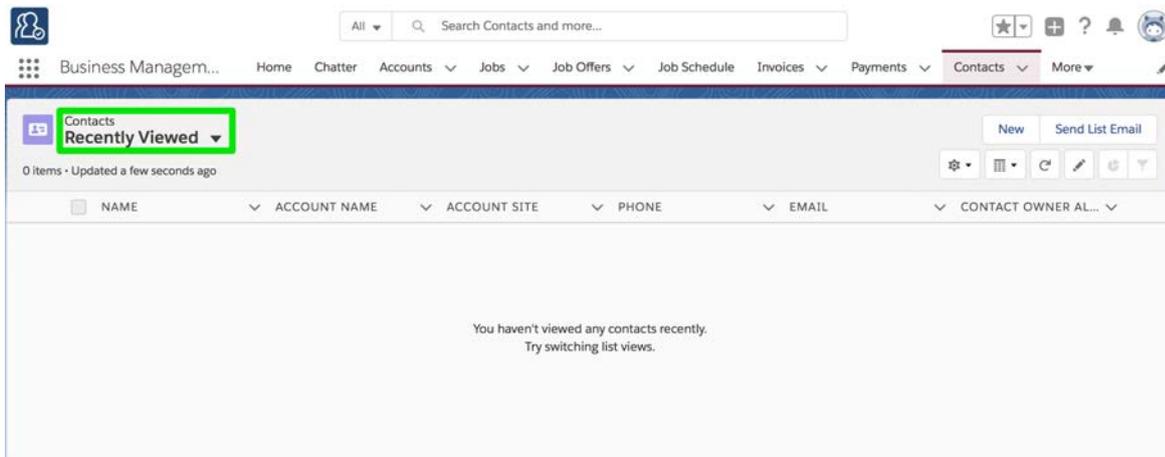
Don't see your result?
We searched the objects you use most, but we didn't search everything.
Know which object you're looking for? Select it in the dropdown next to the search box, or in the sidebar.

How to browse records using List Views

When you open a Salesforce menu, you are unlikely to see all the information that Salesforce is storing. The system might be quite unwieldy if it did show you all its information. To help prevent information overload, what it does is show a subset of the information by use of what Salesforce calls a “List View”.

Each List View shows a certain subset of information. Each Salesforce menu already has multiple List Views, and you can create your own.

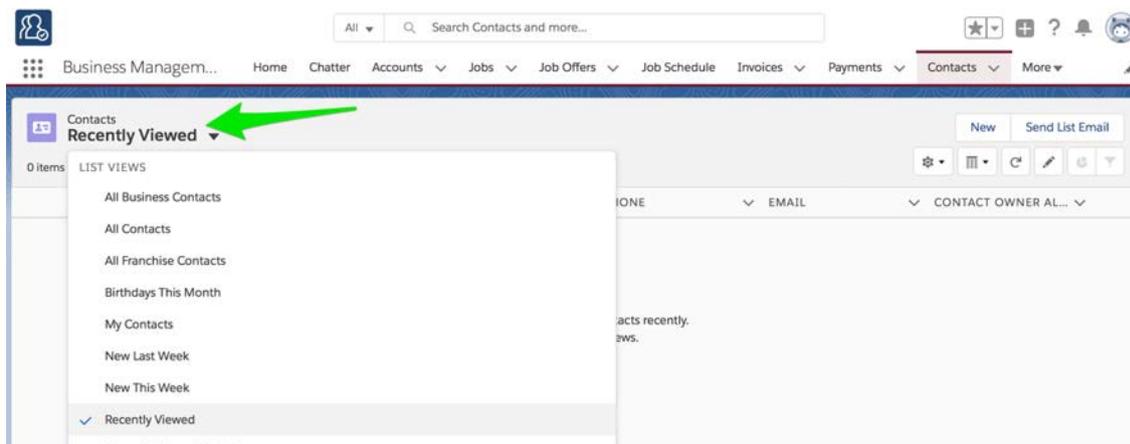
When you first open a menu, the first List View you see is likely to show you an empty list. Salesforce is showing you things you have viewed recently. This is known as the **Recently Viewed** List View.



If this is your first use and you have not yet viewed anything, you will see an empty list.

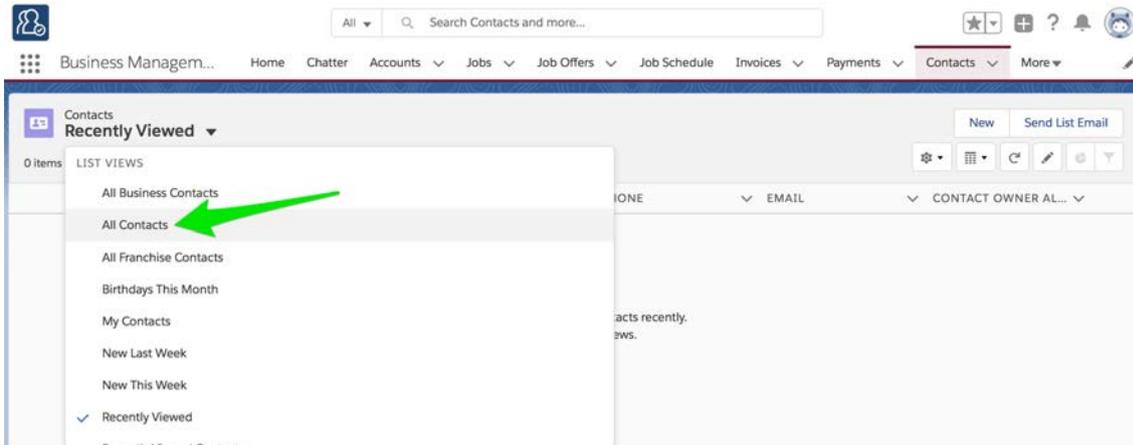
To see some data

1. Click on **Recently Viewed**.



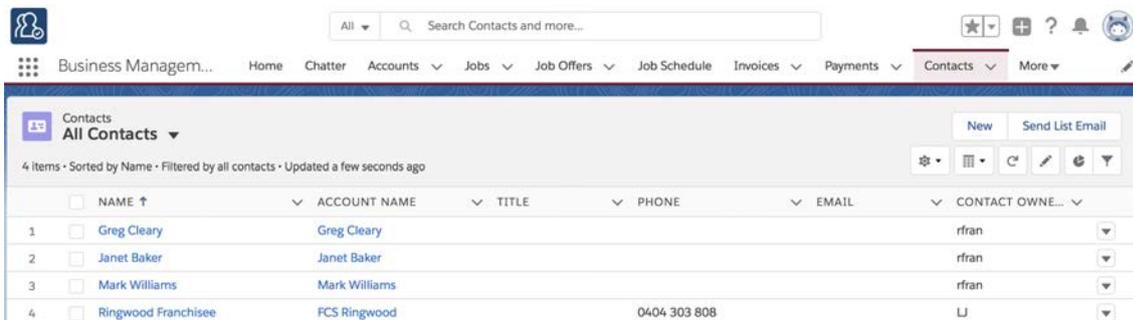
“Recently Viewed” is the name of a list that shows items you have viewed recently. Now that you have clicked on it, you can see the names of other lists.

2. Click on any list containing the word “All.”

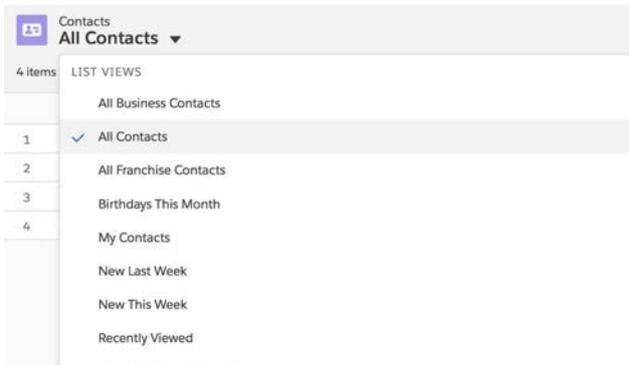


If there is data in your system, this list is likely to show it.

3. You can now see the data displayed by this list view.

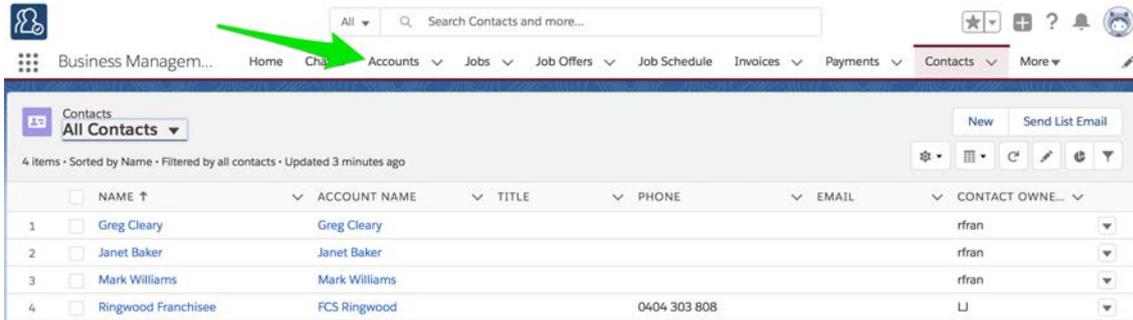


4. Now re-open the list view and notice the different types of views.



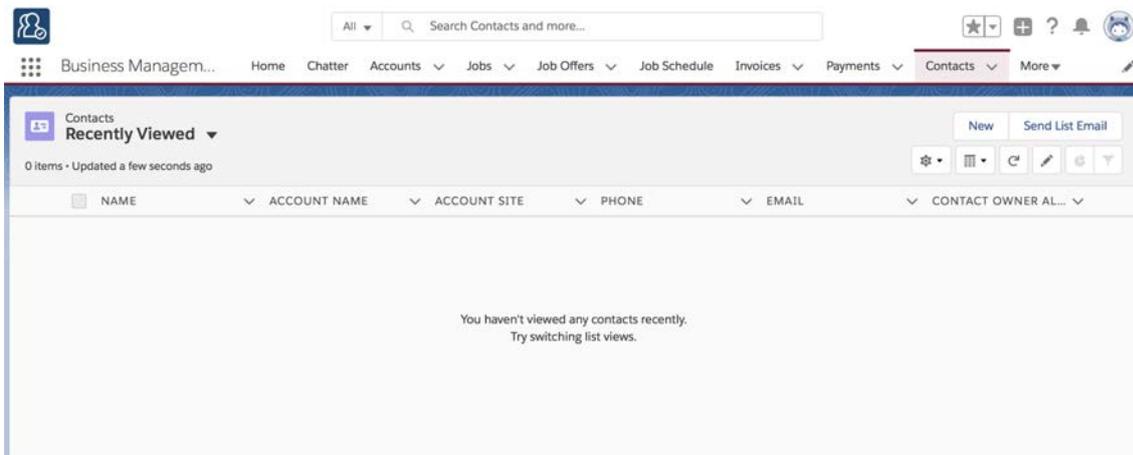
Each list potentially contains a different subset of records. Salesforce uses list views to make the amount of data you can see manageable.

5. Now click away to a different tab.



You will see the list of recently viewed **Accounts**, which will be empty if you have not yet viewed any.

6. Now come back to the original tab.



If you see an empty list, it is because Salesforce is showing you the **Recently Viewed** list.



While this behavior might be surprising when you are just getting started, in practice it is very useful. Most of the time, we want to work on records we have recently viewed. Of course, if you had clicked on one of the records, this list wouldn't be empty. It would show the item you had clicked on.



Take some time to go through each of the list views in the system. Get to know the sort of available list views. Understanding what is available will help you find the right information at the right time.

Key list views

In addition to the standard Salesforce list views, Business Management ships with its own range of useful list views. Familiarizing yourself with these list views will help you quickly become proficient in locating information. A summary of the standard list views appears in the table below.

Record type	List Name	Description
Accounts	Business Accounts	The list of your business customers.
	Individual Accounts	The list of your individual and household customers.
	Franchise Profile Accounts	The list containing your Franchise Profile Account. Your Franchise Profile account is used to manage a range of settings and details for your business. See “Understanding your Franchise Profile Account” on page xxxiii.
Jobs	All Jobs	The list of all jobs in the system.
	All Jobs with Line Items	The list of all jobs that have been quoted or invoiced.
Job Offers	Pending Job Offers	The list of jobs currently offered to you. You can accept, decline or ignore these job offers. Ignored job offers expire.
	Job Offers Today	The list of job offers that offered to you today.
	Accepted Job Offers	The list of job offers you accepted.
	Declined Job Offers	The list of job offers you declined.
	All Job Offers	The complete list of job offers made to you.

How to set a default list view

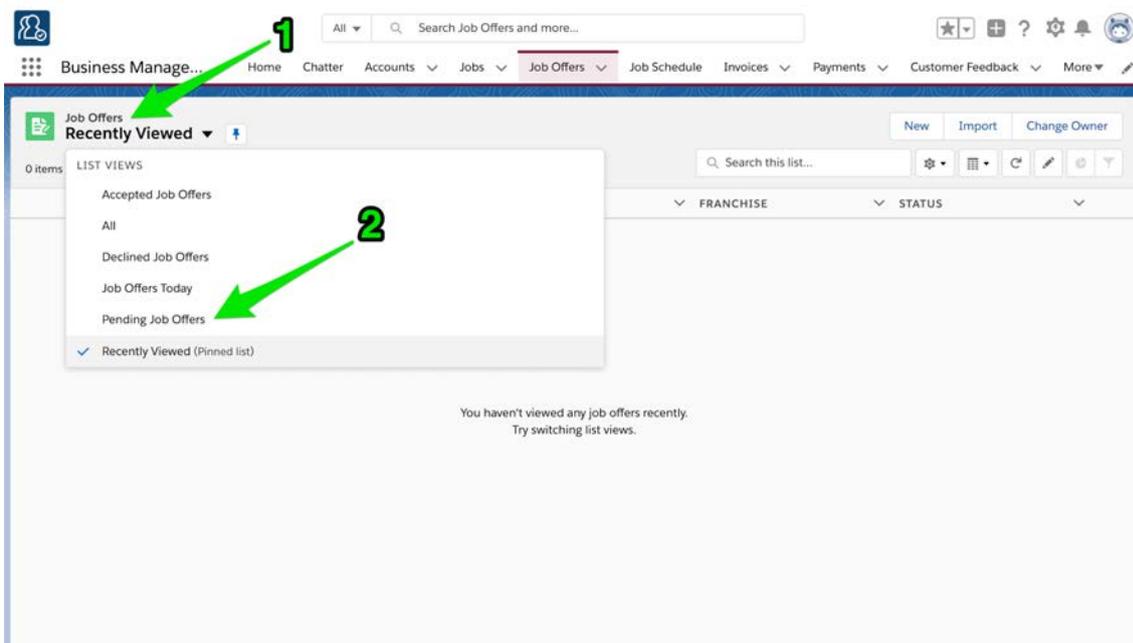
For many tabs, it is quite useful seeing the Recently Viewed list view when you first open the tab. Often times we work with particular items multiple times, and Recently Viewed helps you do this. But for some tabs, you may find it more useful to see another list view as the default. When this is the case, you can choose which list view you see first.



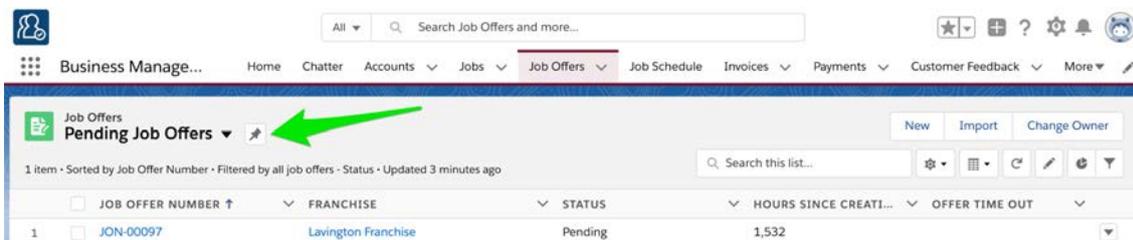
When you select the Job Offers tab, the only job offers you see on the Recently Viewed list are the ones you have already visited. Most times you go to the Job Offers tab, what you are really wanting to see are the new job offers. By following the procedure below, you will be able to set the Job Offers tab to always show you the new jobs that are being offered to your franchise.

To set a default list view

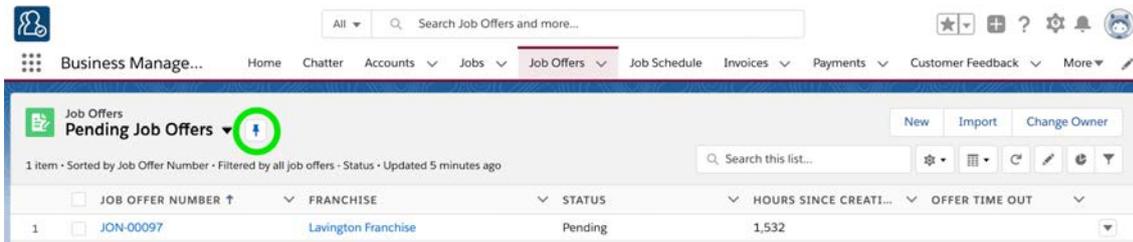
1. Open the List View control and select the List View you want as the initial view.



2. Press the pin.



3. The selected List View is now pinned. You have now set this tab's initial List View.



The screenshot shows the Business Management software interface. The top navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', 'Customer Feedback', and 'More'. The 'Job Offers' tab is active, and the 'Pending Job Offers' view is selected and pinned, indicated by a green circle around the pin icon. The interface shows a list of job offers with columns for 'JOB OFFER NUMBER', 'FRANCHISE', 'STATUS', 'HOURS SINCE CREATI...', and 'OFFER TIME OUT'. A single item is listed: 'JON-00097' under 'Lavington Franchise' with a status of 'Pending' and '1,532' hours since creation.



Test it out by clicking away to another tab and then coming back. It will show you the pinned List View.

How to customize a list view

Once you have become familiar with the list views that are already available, you might want to configure your own list view to meet your particular need.



Imagine you want to see the list of jobs where payments are owed to you. You could create a list view to show **Jobs with Balance Owning**.

To modify an existing list view

1. Select the list view you want to copy.

JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY	STATE (DE...	COU...	CREATED ...
1	JN-00183	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		18/04/20...
2	JN-00173			FCS Bondi...	Assigned	Territory (D) - Bondi Bea...		18/04/20...
3	JN-00172	Genevieve ...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...			17/04/20...
4	JN-00171		FCS Bondi...	Assigned	Territory (D) - Bondi Bea...			17/04/20...
5	JN-00169	Bondi We...	FCS Bondi...	Assigned	Territory (D) - Bondi Bea...			17/04/20...
6	JN-00167	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...			13/04/20...
7	JN-00166		FCS Bondi...	Assigned	Territory (D) - Bondi Bea...			13/04/20...
8	JN-00161	Hamilton, Bondi Beach	Alexander ...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		6/04/201...

2. Open the List View Control and choose Clone.

JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY	STATE (DE...	COU...	CREATED ...
1	JN-00183	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		18/04/20...
2	JN-00173		FCS Bondi...	Assigned	Territory (D) - Bondi Bea...			18/04/20...
3	JN-00172	Genevieve ...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...			17/04/20...
4	JN-00171		FCS Bondi...	Assigned	Territory (D) - Bondi Bea...			17/04/20...
5	JN-00169	Bondi We...	FCS Bondi...	Assigned	Territory (D) - Bondi Bea...			17/04/20...
6	JN-00167	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...			13/04/20...
7	JN-00166		FCS Bondi...	Assigned	Territory (D) - Bondi Bea...			13/04/20...
8	JN-00161	Hamilton, Bondi Beach	Alexander ...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		6/04/201...
9	JN-00160	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...		6/04/201...

The **Clone List View** dialog box appears.

3. Enter the new List Name and press Save.

Clone List View

*List Name

Jobs with Balance Owing

Who sees this list view?

Only I can see this list view

All users can see this list view

Cancel Save

The newly named list view appears together with its filter pane.

4. Choose the Add Filter link to add an extra filter condition.

The screenshot shows the 'Jobs' list view titled 'Jobs with Balance Owing'. A filter pane is open on the right side. The filter pane contains a 'Field' dropdown set to '# Jobs', an 'Operator' dropdown set to 'equals', and an empty 'Value' field. Below the filter pane are buttons for 'Add Filter', 'Remove All', and 'Add Filter Logic'. The main list view shows 17 items sorted by Job Number.

5. Use the Field, Operator and Value fields to set the new condition, then press Done.

The screenshot shows the 'Jobs' list view titled 'Jobs with Balancing Owing'. The filter pane is open and the fields are filled: 'Field' is 'Balance Owing', 'Operator' is 'greater than', and 'Value' is '0.00'. A green arrow points to the 'Done' button. The main list view shows 17 items sorted by Job Number.

6. Now press Save.

Business Management... Home Chatter Accounts Jobs Job Offers Job Schedule Invoices Payments Tasks More

Jobs with Balancing Owing

17 items • Sorted by Job Number • Updated 3 minutes ago

JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY	
1	JN-00183	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
2	JN-00173		FCS Bondi...	Assigned	Territory (D) - Bondi Bea...	
3	JN-00172	Genevieve ...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...	
4	JN-00171		FCS Bondi...	Assigned	Territory (D) - Bondi Bea...	
5	JN-00169	Bondi We...	FCS Bondi...	Assigned	Territory (D) - Bondi Bea...	
6	JN-00167	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...	
7	JN-00166		FCS Bondi...	Assigned	Territory (D) - Bondi Bea...	
8	JN-00161	Hamilton, Bondi Beach	Alexander ...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
9	JN-00160	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...

Cancel Save

Show me All jobs

Matching all of these filters

Balance Owing* greater than 0.00

Add Filter Remove All

Add Filter Logic

7. Press the arrow to remove the Filters pane.

Business Management... Home Chatter Accounts Jobs Job Offers Job Schedule Invoices Payments Tasks More

Jobs with Balancing Owing

9 items • Sorted by Job Number • Filtered by Balance Owing • Updated a few seconds ago

JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY	
1	JN-00183	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
2	JN-00172	Genevieve ...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...	
3	JN-00167	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...	
4	JN-00161	Hamilton, Bondi Beach	Alexander ...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
5	JN-00160	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...
6	JN-00150	Front Yard Pruning	Sally Smith	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
7	JN-00149	Painting and Fencing Job	James Bro...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
8	JN-00148	Mattress Disposal	Test99 Tes...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
9	JN-00147	test test	FCS Bondi...	Closed	Territory (D) - Bondi Bea...	

Filters

Show me All jobs

Matching all of these filters

Balance Owing greater than AUD 0

Add Filter Remove All

Add Filter Logic

Now you can see your newly modified list view.

Business Management... Home Chatter Accounts Jobs Job Offers Job Schedule Invoices Payments Tasks More

Jobs with Balancing Owing

9 items • Sorted by Job Number • Filtered by Balance Owing • Updated 2 minutes ago

JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY	STATE (DE...	COU...	CREATED ...
1	JN-00183	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		18/04/20...
2	JN-00172	Genevieve ...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...			17/04/20...
3	JN-00167	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...			13/04/20...
4	JN-00161	Hamilton, Bondi Beach	Alexander ...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		6/04/201...
5	JN-00160	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...		6/04/201...
6	JN-00150	Front Yard Pruning	Sally Smith	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		12/03/20...
7	JN-00149	Painting and Fencing Job	James Bro...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		20/02/20...
8	JN-00148	Mattress Disposal	Test99 Tes...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...		19/02/20...



Making list views customized for your requirements will make your work much more efficient and enjoyable.

How to create your own list view

Creating your own list view can be a useful way to quickly access data.



In this example, we're going to create a list view to show us jobs that have been assigned to us that we have not yet contacted.

To create a new list view

1. Open the **List View Control** and choose **New**.

The screenshot shows the Business Management interface with the 'Jobs' list view control open. The 'LIST VIEW CONTROL' menu is visible, and the 'New' option is highlighted. A green arrow labeled '1' points to the 'LIST VIEW CONTROL' icon, and another green arrow labeled '2' points to the 'New' option in the dropdown menu.

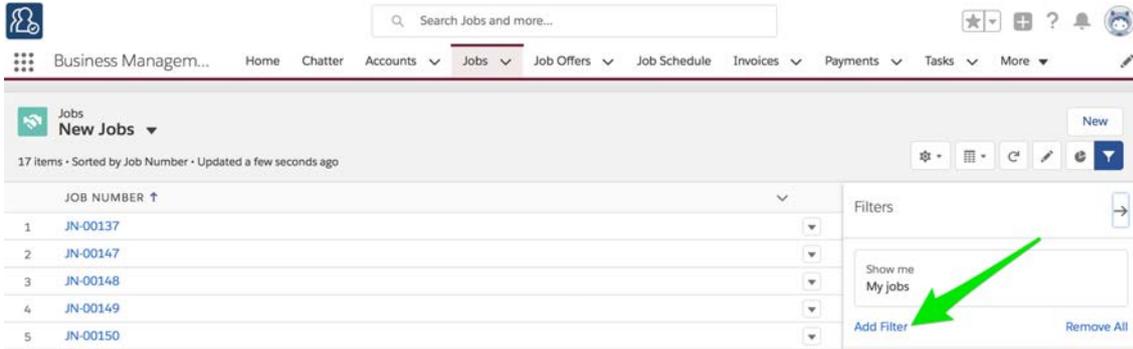
JOB NUMBER	JOB NAME	CUSTOMER	FRANCHISE	TERRITORY	
1	JN-00159	Campbell, Bondi Beach	Alistair Campbell	FCS Bondi Beach	Territory (D) - Bondi B...
2	JN-00161	Hamilton, Bondi Beach	Alexander Hamilton	FCS Bondi Beach	Territory (D) - Bondi B...
3	JN-00169		Bondi Web Design	FCS Bondi Beach	Territory (D) - Bondi B...
4	JN-00171			FCS Bondi Beach	Territory (D) - Bondi B...
5	JN-00183	Painting Fence, Bondi Beach	Ronald Pham	FCS Bondi Beach	Territory (D) - Bondi B...
6	JN-00160	Painting Fence, Bondi Beach	Ronald Pham	FCS Bondi Beach	Territory (D) - Bondi B...
7	JN-00167		Ronald Pham	FCS Bondi Beach	Territory (D) - Bondi B...
8	JN-00172		Genevieve McMullan	FCS Bondi Beach	Territory (D) - Bondi B...
9	JN-00148	Mattress Disposal	Test99 Test99	FCS Bondi Beach	Territory (D) - Bondi B...

2. Enter the new **List Name** and press **Save**.

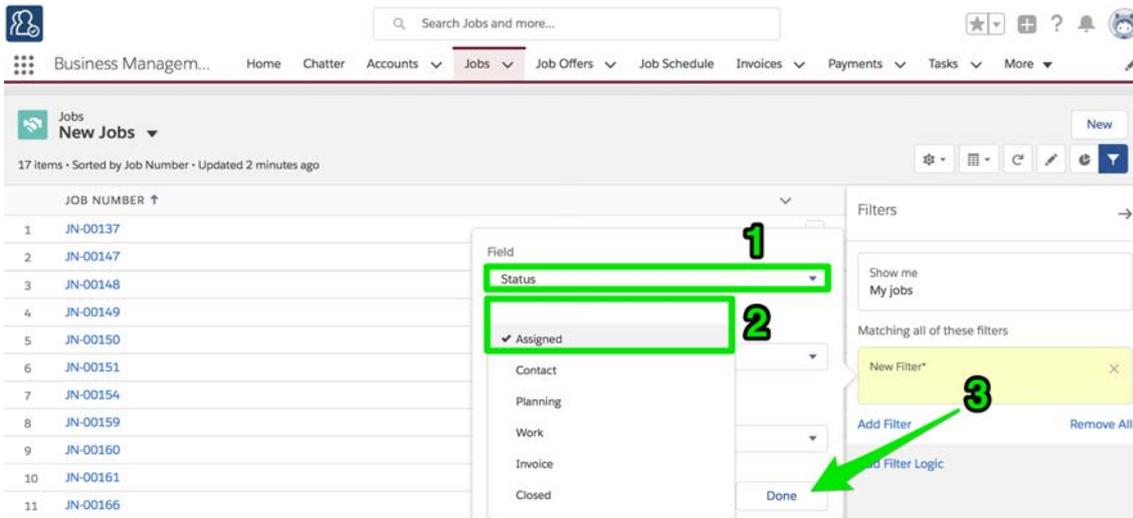
The screenshot shows the 'New List View' form. The 'List Name' input field contains 'New Jobs'. The 'Who sees this list view?' section has two radio buttons: 'Only I can see this list view' (selected) and 'All users can see this list view'. A green arrow labeled '1' points to the 'List Name' input field, and another green arrow labeled '2' points to the 'Save' button.

The newly named list view appears together with its filter pane.

3. Choose the **Add Filter** link to add an extra filter condition.

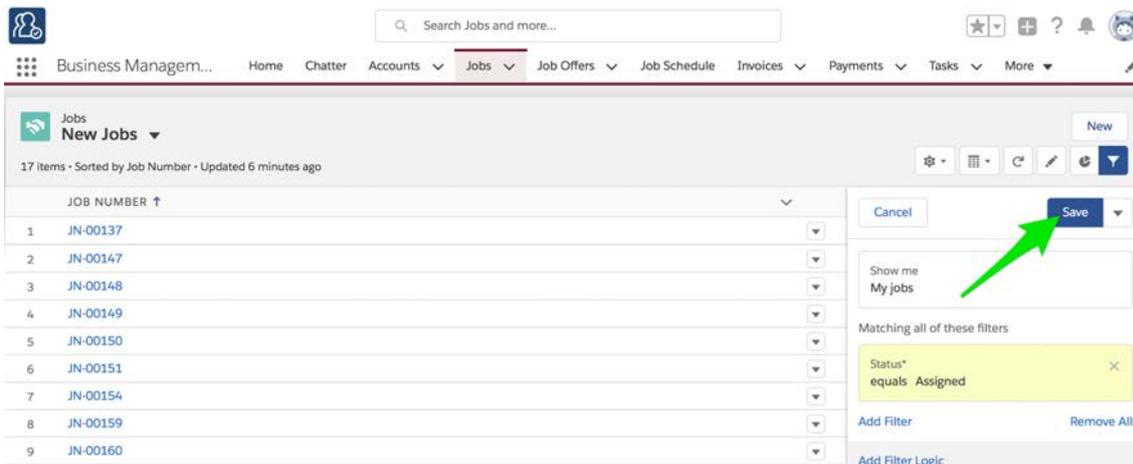


4. Use the **Field**, **Operator** and **Value** fields to set the new condition, then press **Done**.

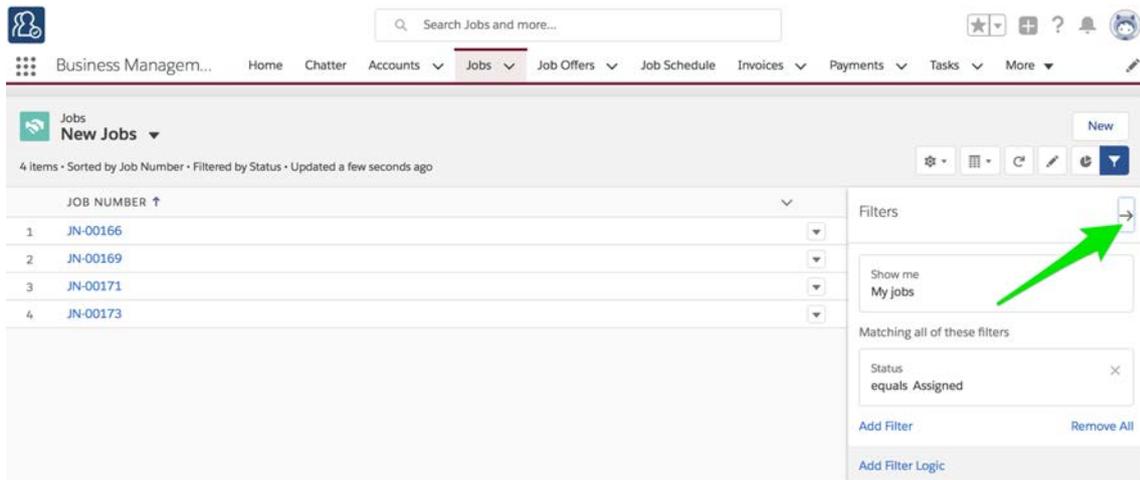


 In the above image *Operator* is set to *equals*.

5. Press **Save**.



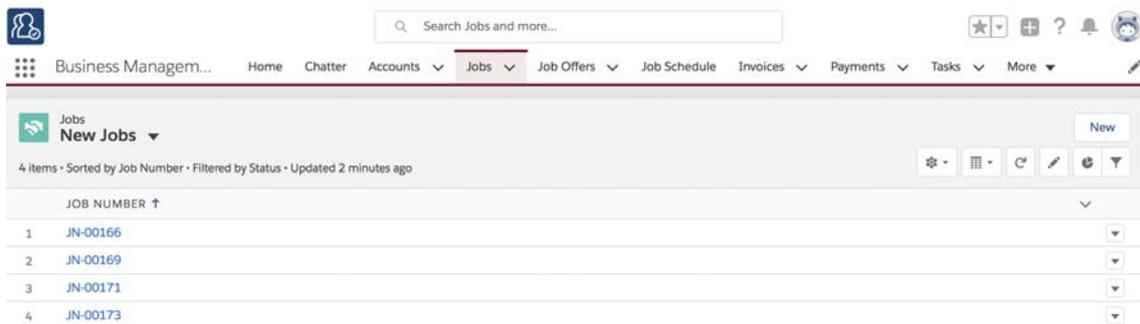
6. Press the arrow to remove the **Filters** pane.



The screenshot shows the Business Management interface with the Jobs section selected. The main content area displays a list of jobs with columns for Job Number and Status. A Filters pane is open on the right side, showing a filter for Status equals Assigned. A green arrow points to a close button (an arrow pointing right) on the top right of the Filters pane.

JOB NUMBER ↑	
1	JN-00166
2	JN-00169
3	JN-00171
4	JN-00173

7. Now you can see your newly modified list view.



The screenshot shows the same Business Management interface, but the Filters pane has been removed. The list view is now wider, showing the Job Number and Status columns for the same four jobs.

JOB NUMBER ↑	
1	JN-00166
2	JN-00169
3	JN-00171
4	JN-00173



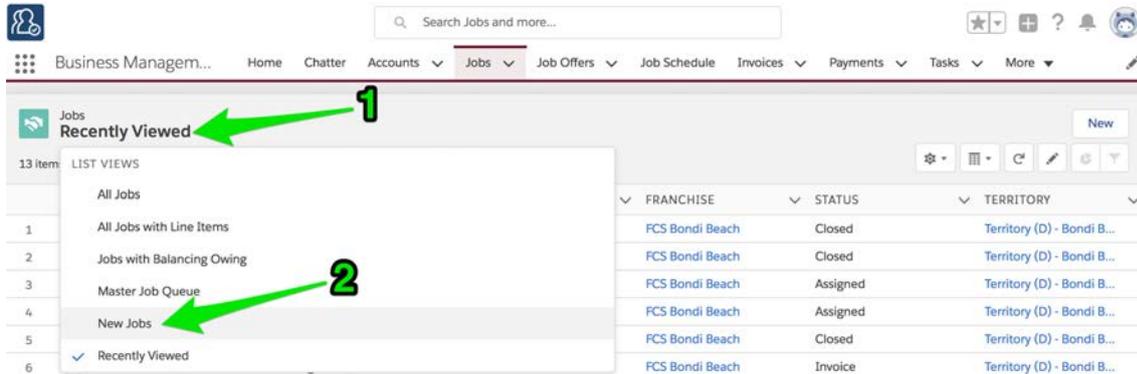
To make this list view more useful, add some extra columns to it. See “How to add columns to a list view” on the facing page.

How to add columns to a list view

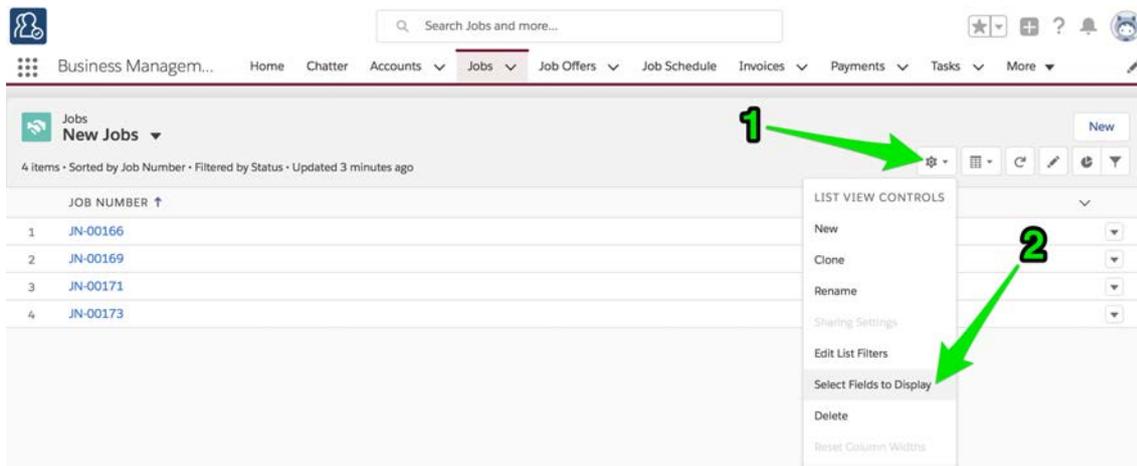
You can add columns to any custom list view.

To add columns to a custom list view

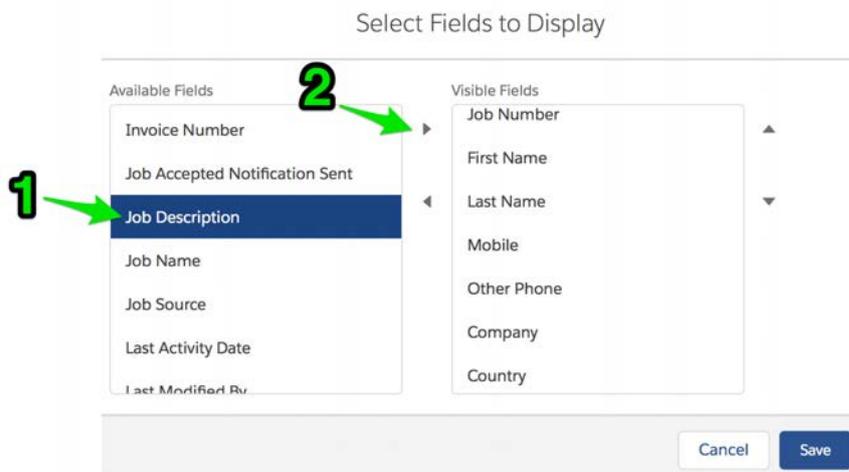
1. From **Recently Viewed**, select a custom list.



2. Open the **List View Control** and choose **Select Fields to Display**.



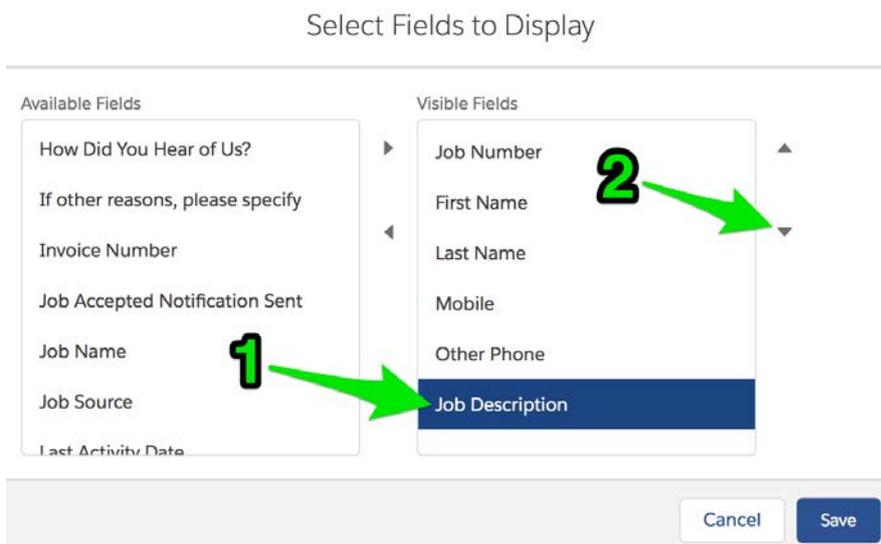
3. From **Available Fields**, select the fields you want to make visible.



4. Now remove any fields you want not to display.



5. Sort the fields into the order you want to see.



6. When you have selected all the fields you want to see, press **Save**.

Select Fields to Display

Available Fields

- How Did You Hear of Us?
- If other reasons, please speci
- Invoice Number
- Job Accepted Notification Se
- Job Name
- Job Source
- Last Activity Date
- Last Modified By
- Last Modified By Alias
- Last Modified Date
- Location (Latitude)

Visible Fields

- Job Number
- First Name
- Last Name
- Mobile
- Other Phone
- Job Description

Cancel Save

Now you can see the updated list.

Business Managem... Home Chatter Accounts Jobs Job Offers Job Schedule Invoices Payments Tasks More

Jobs
New Jobs

4 items • Sorted by Job Number • Filtered by Status • Updated a few seconds ago

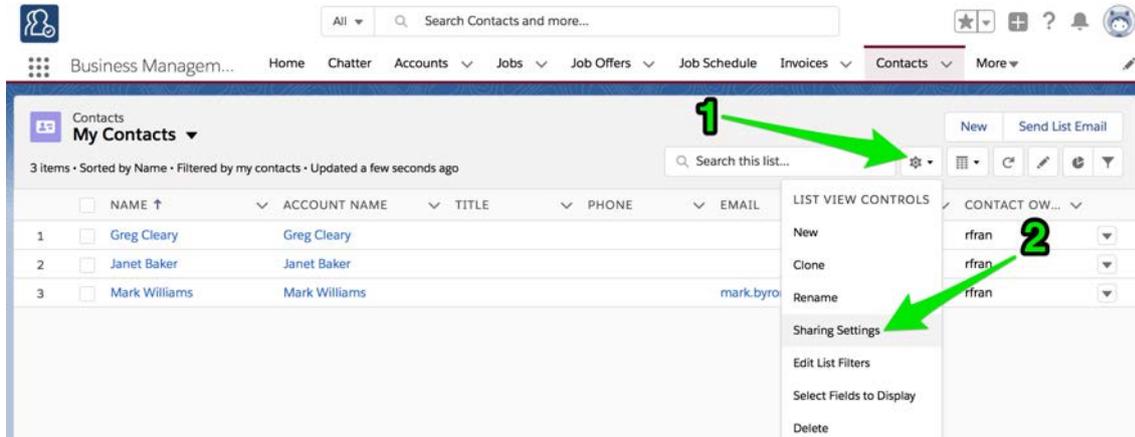
	JOB NUMBER ↑	FIRST NAME	LAST NAME	MOBILE	OTHER PHONE	JOB DESCRIPTION
1	JN-00166	Mark	Guinness	0404789400		Mortgage
2	JN-00169	Anita	Smith			Mortgage
3	JN-00171	Alexander	Hamilton			Roofing
4	JN-00173	George	Barker			Roofing

How to share list views

You can share your list views with your colleagues.

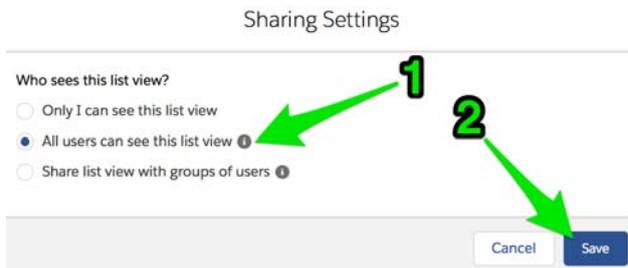
To share a list view

1. Select a custom list view that you want to share with others.
2. Open the **List View Control** and choose **Sharing Settings**.



The **Sharing Settings** dialog box appears.

3. Select **All users can see this list view** and press **Save**.



You have now shared a list view with everyone.



The shared list view can now be edited by anyone with the **Manage Public List Views** permission.

CHAPTER 4

Working with Customer Accounts

Understanding Accounts	lxxvii
When a customer contacts you	lxxviii
How to create an account for an individual customer	lxxix
How to create an account for a business	lxxx
How to add a contact to a business account	lxxxii
How to convert an individual account into a business account	lxxxv

Understanding Accounts

In Business Management accounts represent the customers you do business with. Some accounts represent individuals. You use this for people who need your services. Other accounts represent businesses.

While an individual account usually represents a single person (or a household), it can also be used to represent a business with which you have a single point of contact.

Business accounts are used when you interact with multiple people (business accounts can have multiple contacts) or when the business is a supplier. The records representing people attached to a business account are called “contacts.”

Accounts are at the heart of both Business Management and your business.



The quality of the Account information is a key part of the value of your business. Having good quality account information is quite important when it comes time to sell your franchise. It's worth making sure this information is always up-to-date and accurate.

When a customer contacts you

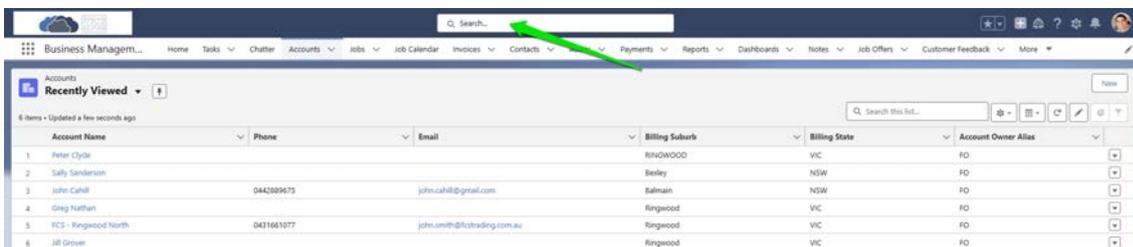
The ideal time to create a new account is on first contact with the customer. When a customer contacts you, we recommend you search customer accounts to see whether this person or business is already a customer. Doing this will help you avoid creating duplicate accounts.



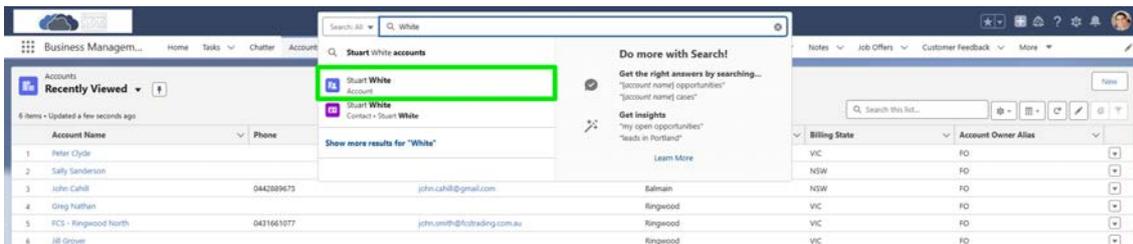
Part of demonstrating the value of your customer base is showing how many of them are repeat customers, so you want to avoid creating duplicate accounts if you can at all help it.

To see whether a person or business is already a customer

1. Search to see whether an account for this person exists.



Enter any part of the person's name into the search box.



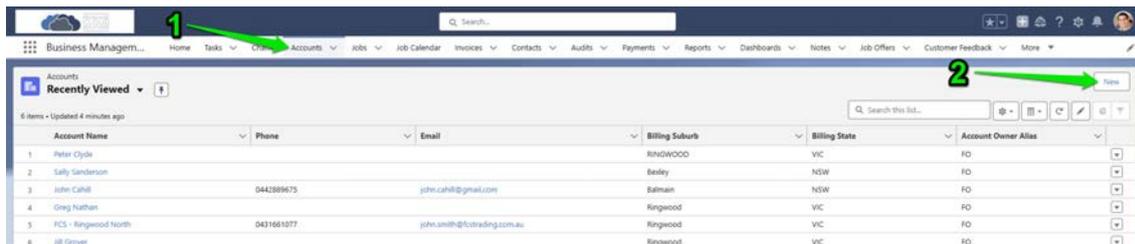
2. If any of the search results match the person or business that you are searching for then you can select and use this account.
3. If you cannot find the person or business you are searching for, you will want to create a new account.

How to create an account for an individual customer

An “individual customer” can represent an individual person. It can also represent a household unit (such as “Mr and Mrs Smith”) or even a business for whom you have one main contact.

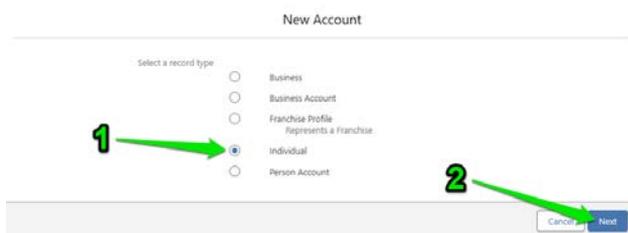
To create an individual account

1. From the Accounts list page, press **New**.



The **New Account** dialog box appears.

2. Choose **Individual** then press **Next**.

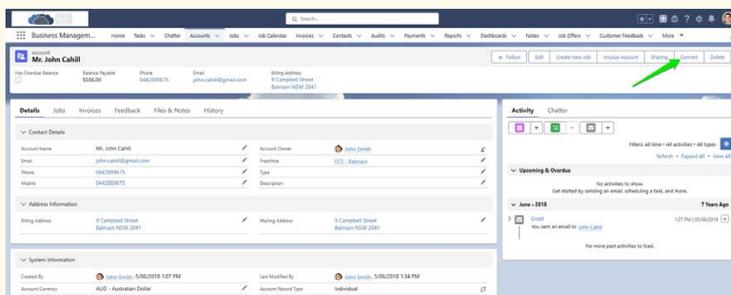


The **New Account: Individual** dialog box appears.

3. Now complete creating the account by entering all relevant details.



If you discover a business account would have been more suited than an individual account, you can **Convert** an individual account into a business account.



How to create an account for a business

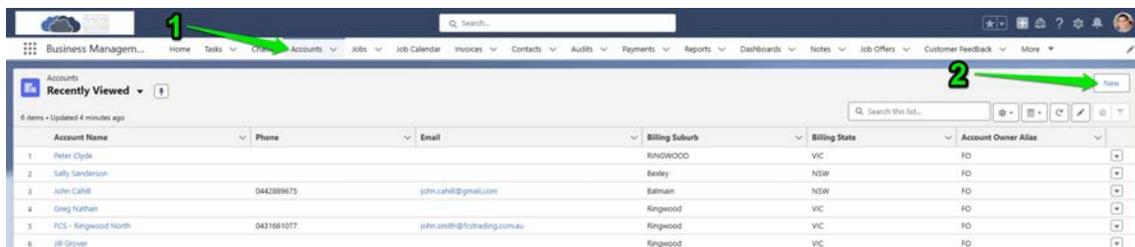
A “business” account type represents a commercial entity with multiple contacts. They can also be used to represent suppliers. Many contacts can be associated with a single business account.



- » Just because it is a business customer doesn't mean it has to be an actual business. Business accounts can be useful to represent families and rental premises too.
- » Business accounts take just a little longer to complete. You can sometimes save time by creating an Individual account.

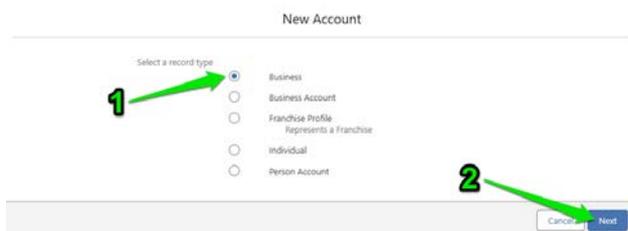
To create a business account

1. From the Accounts list page, press **New**.



The **New Account** dialog box appears.

2. Check that **Business** is selected, then press **Next**.



The **New Account: Business** dialog box appears.

3. Now complete the account creation by entering all relevant details then pressing **Save**.



When you have created the business account, you may want to add a contact. See “How to add a contact to a business account” on page lxxxii.

To identify a business account as a supplier

- » Check the Available as Supplier check box.

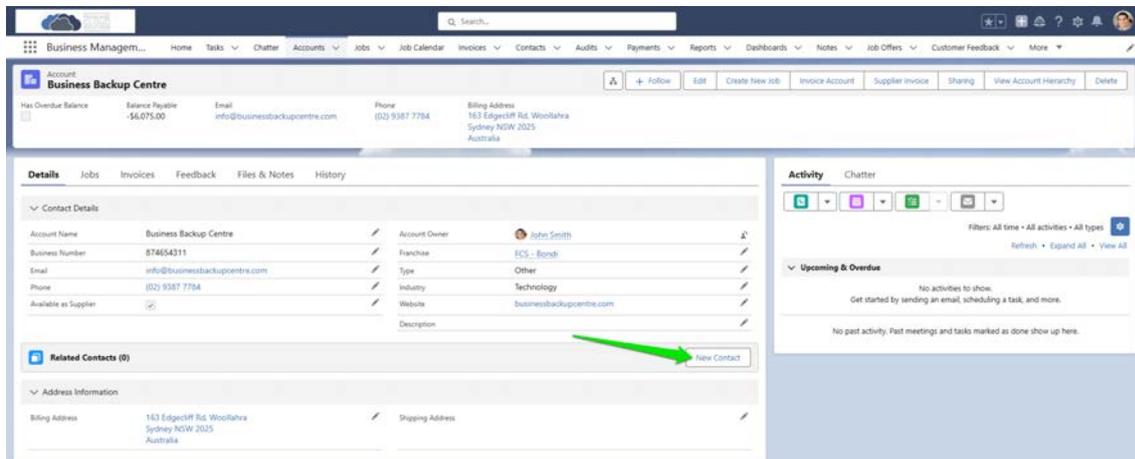
The screenshot displays the 'Business Management' software interface. The main content area shows the details for an account named 'Smith's Floorworld Ringwood'. The 'Contact Details' section includes fields for Account Name, Business Number, Email, Phone, Account Owner, Franchise, Type, Industry, Website, and Description. The 'Available as Supplier' checkbox is highlighted with a green border. The 'Activity' section on the right shows a 'Chatter' area with a filter set to 'All time' and 'All activities'. The 'Upcoming & Overdue' section indicates 'No activities to show'.

Contact Details	
Account Name	Smith's Floorworld Ringwood
Business Number	55005846654
Email	ringwood@floorworld.com.au
Phone	03 9879 1622
Account Owner	John Smith
Franchise	ECS - Ringwood North
Type	
Industry	
Website	www.floorworld.com.au
Description	

How to add a contact to a business account

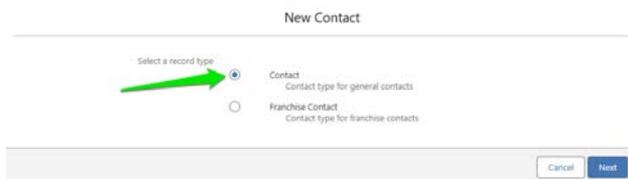
To add a contact to a business account

1. From the Account Details page, press New Contact.



The New Contact dialog box appears.

2. Choose Contact then press Next.



The New Contact: Contact dialog box appears.

- Complete all relevant details on the contact.
If you are adding more than one contact to the business account, press **Save and New**, otherwise press **Save**.

New Contact: Contact

* = Required Information

Contact Information

* Name: Salutation (Mr.), First Name (Allen), * Last Name (Bond)

Account Name: Business Backup Centre

Title: CEO

Reports To: Search Contacts...

Department: []

Birthdate: []

Contact Owner: John Smith

Phone: (02) 9387 7784

Home Phone: []

Mobile: 0463921844

Fax: []

Email: allen@businessbackupcentre.com

Address Information

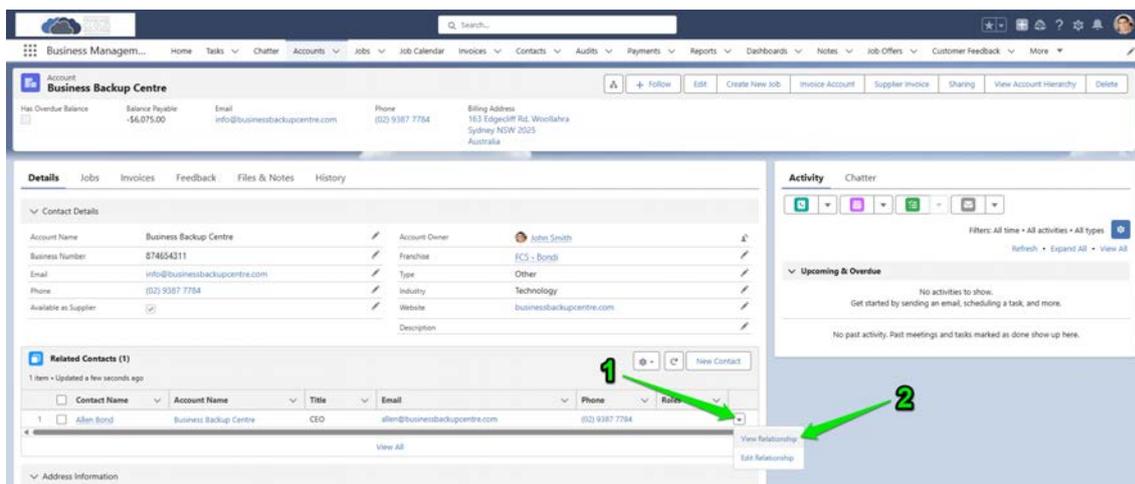
Mailing Address: Mailing Street (163 Edgecliff Rd, Woollahra)

Other Address: Other Street, Other State

Buttons: Cancel, Save & New, Save

 When you have more than one contact, it is often useful to define the relationship. That way you can tell who is the billing contact and who is the job contact.

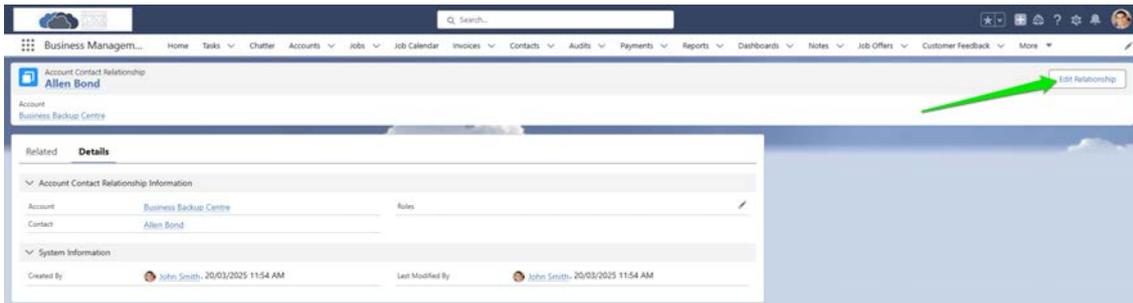
- Press **Show more** then **View Relationship**.



The screenshot shows the 'Business Backup Centre' account page. Under the 'Details' tab, there is a 'Contact Details' section and a 'Related Contacts (1)' table. The table has columns for Contact Name, Account Name, Title, Email, and Phone. A dropdown menu is open for the first row, showing 'View Relationship' and 'Edit Relationship' options. Green arrows labeled '1' and '2' indicate the steps to view the relationship.

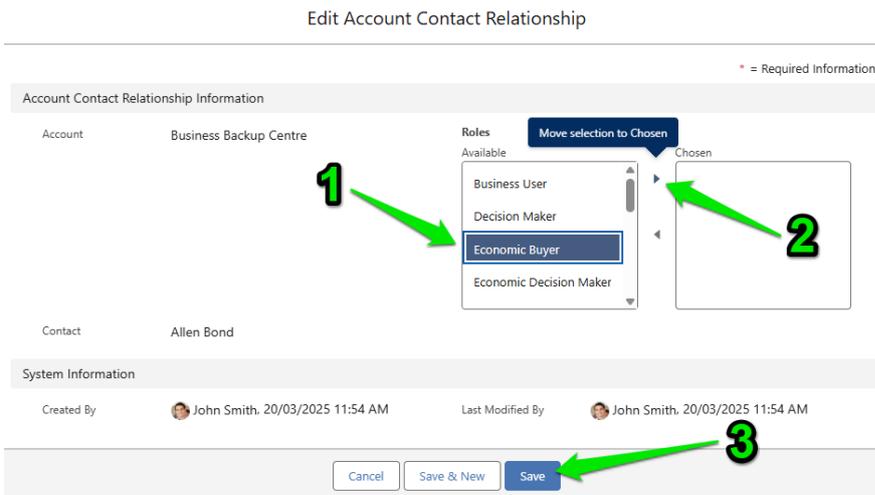
The Account Contact Relationship page appears.

5. Press **Edit Relationship**.



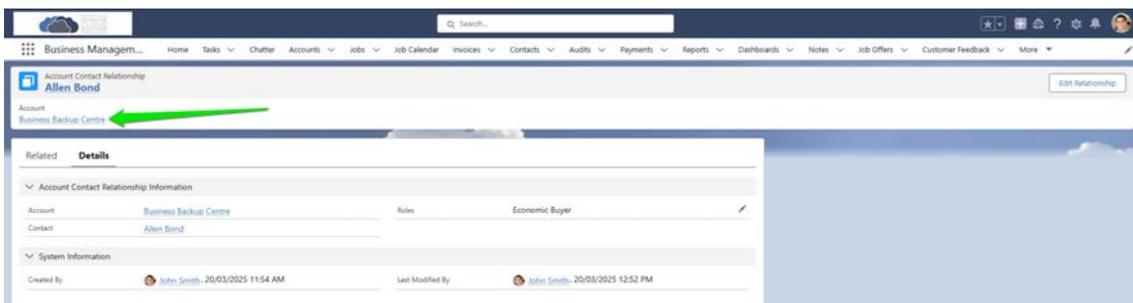
The **Edit Account Contact Relationship** dialog box appears.

6. Now select the appropriate **Role** and move it to the **Chosen** column by pressing the arrow, then press **Save**.



The relationship has been added.

7. Now you can go back to the account.

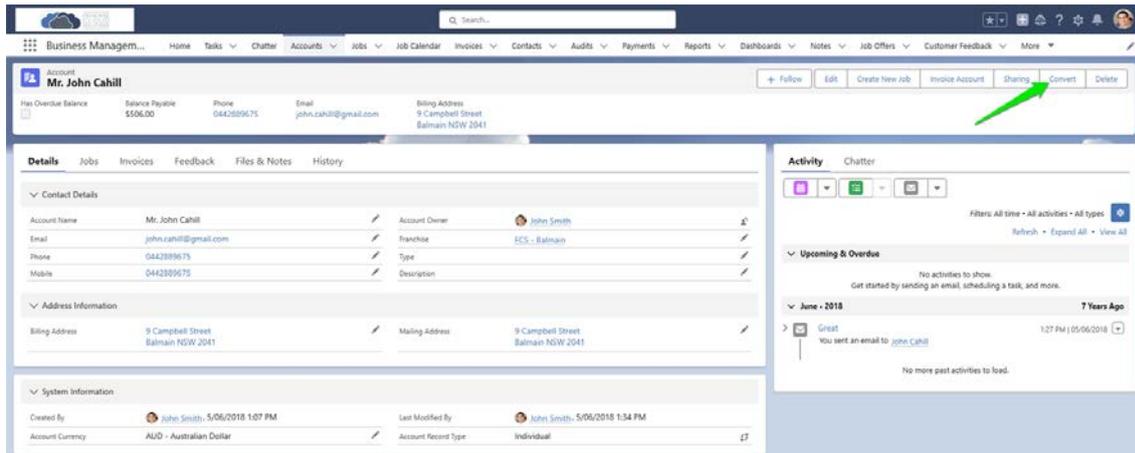


How to convert an individual account into a business account

While it is quicker to create an individual account, in the end business accounts can be more flexible. If you have created an individual account that in retrospect you would now like to be a business account, it is possible to convert it.

To convert an individual account into a business account

1. From an individual account, select the **Convert** button.



2. Enter a new account name. Press **Convert**.

Convert Account

New Account Name

3. The system processes the account. When converted, you will see a green **Completed** notification.



What happens during conversion?

The system creates a new Business Account with the name you provide. It copies the details from the individual account to the business account. Personal contact details are copied into a contact attached to the business account. Then it copies all related objects to the business account (activity history, jobs, invoices, payments, customer feedback, etc.). When it is done, it deletes the individual account.

CHAPTER 5

Working with Job Offers

Introducing job offers	lxxxvii
How to respond to job offers within Salesforce	lxxxviii
How to respond to job offers in Salesforce Mobile	xc
How to respond to job offers by email	xcvi
How to respond to job offers by SMS	xcix

Introducing job offers

When a customer contacts your franchisor with a potential job, it is captured as a job request. Job requests are entered via the franchisor's website or by the franchisor's call center.

When a job request enters the system, it passes through a Job Allocation System whose purpose is to identify the franchisee best placed to service the request. The Job Allocation System applies a series of rules configured by your franchisor. The rules determine the franchisee or franchisees to whom an offer of a job will be made.



Here is an example of applying a typical rule. A rule can be established that any job request made within a franchisee's owned territory is automatically assigned to that franchisee. Here is how this rule is applied

- » When a job request is within a franchisee's territory and the franchisee can perform the work, the job will be offered to that franchisee first.
- » When the request is outside all active franchise territories, it is offered to the franchisee best-placed to service the request.

Job offers are made after applying many rules of this sort.

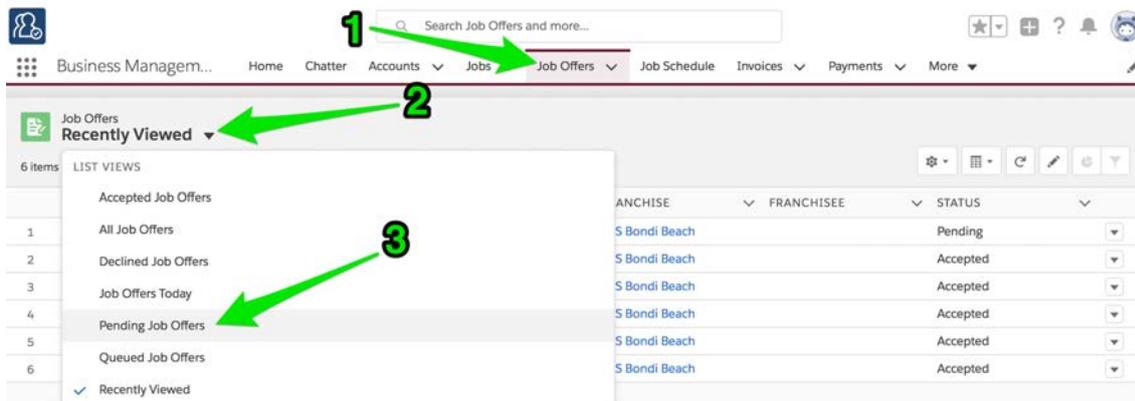
In most cases, you need to accept the offer within the job offer time-frame in order for the job to be allocated to your business. If you decline or ignore the job offer, the job is usually offered to the next-best placed franchise.

How to respond to job offers within Salesforce

Job Offers must be responded to within a defined time-frame. If you don't respond within the given time-frame they will timeout and usually be offered to another franchise. Business Management contains a Pending Job Offers list. The items you see on this list are currently being offered to your franchise.

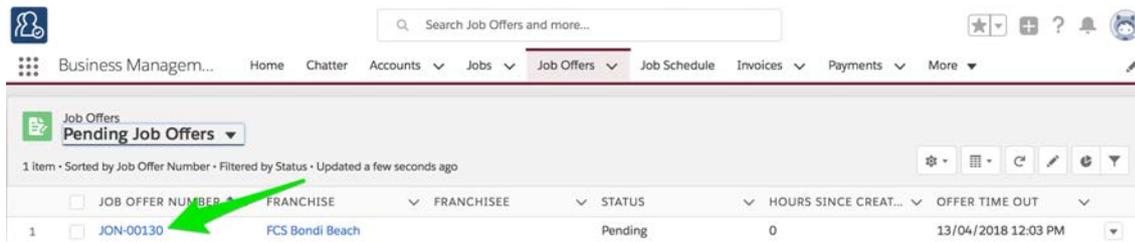
To accept a Job Offer within Salesforce

1. From the Salesforce menu, select **Job Offers**. From the **Recently Viewed Job Offers** list view, select **Pending Job Offers**.



You can see the job offers currently available to your franchise.

2. Select the **Job Offer** record you want to accept.



- Review the job details. When you are satisfied that you want to accept this job, press **Accept**.

The screenshot shows the 'Job Offer JON-00130' page. At the top, there is a search bar and navigation tabs for 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. Below the navigation, there are buttons for 'Edit', 'Change Owner', 'Accept', and 'Decline'. A green arrow points to the 'Accept' button. The main content is divided into 'DETAILS' and 'RELATED' sections. The 'DETAILS' section includes fields for Job Offer Number (JON-00130), Job (JN-00164), Franchise (FCS Bondi Beach), Job Time Out (13/04/2018 12:24 PM), Offer Time Out (13/04/2018 12:03 PM), SMS Requested (checked), Contact Name (Alex de Tocqueville), Street (19 Sir Thomas Mitchell Rd), Suburb (Bondi Beach), Postcode (2026), and Details (Repairs & Maintenance; Fix leaks in seams and windows). The 'RELATED' section includes Owner (Simon Walker), Status (Pending), Cancel Reason, Minutes Since Creation (25), Minutes to reply, Hours Since Creation (0), and Reply Processed.



The page layout is indicative. Your implementation may show different fields.

- From the **Accept** dialog box, press **Save**.

The 'Accept' dialog box has a title bar 'Accept'. Below it is a 'Status' dropdown menu with 'Accepted' selected. At the bottom, there are 'Cancel' and 'Save' buttons.

You have now accepted the Job Offer. You will now find the Job associated with this offer in the **All Jobs** list view, within the **Jobs** page.



The Job is now ready for you to begin working. See “Working with Jobs” on page cii.

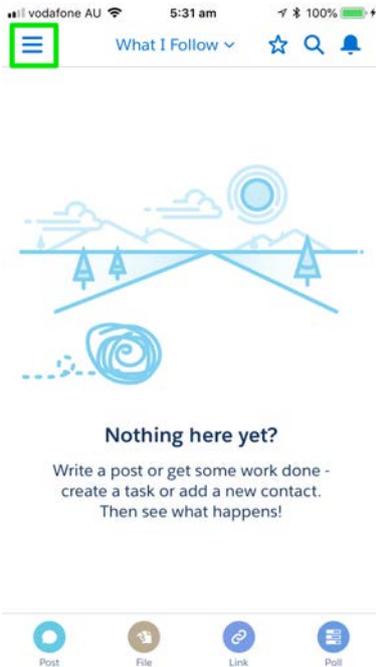
How to respond to job offers in Salesforce Mobile



To install Salesforce Mobile on your phone, See “How to install and open Salesforce on your mobile” on page ccxcv.

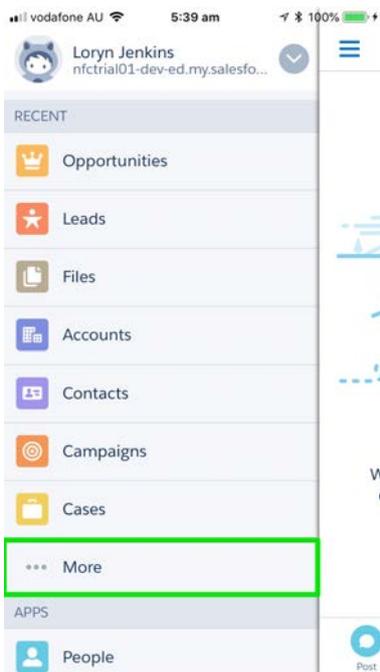
To respond to a Job Offer in Salesforce Mobile

1. When you are logged in, select the hamburger menu.

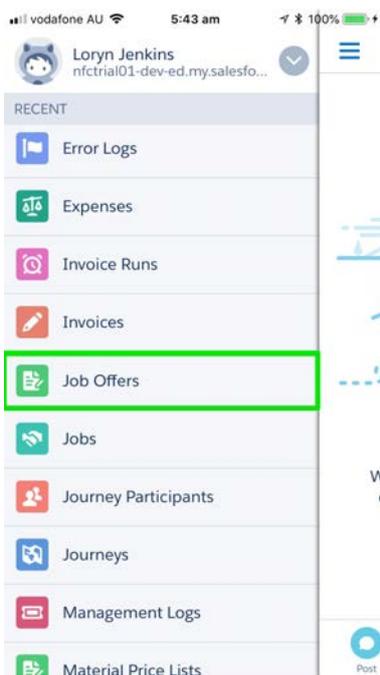


The Salesforce menu opens.

2. Scroll down to **Recent** and press **More**.



3. Resume scrolling until you see **Job Offers**. Press **Job Offers**.

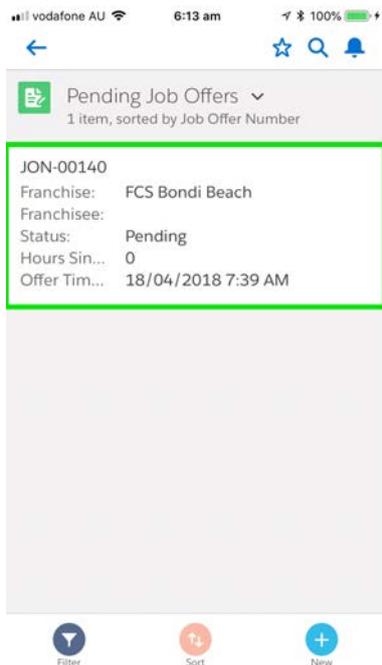


4. From the **Job Offers** page, select the **Pending Job Offers** list view.



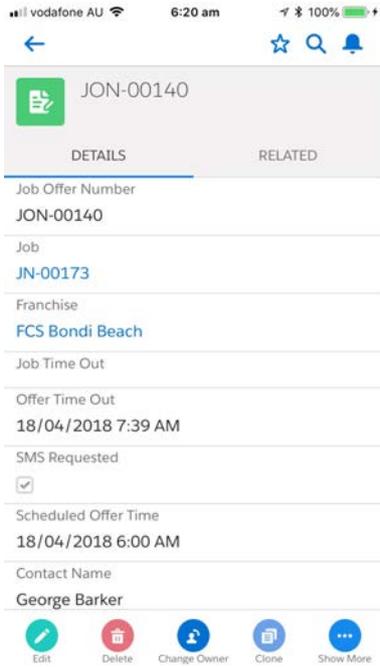
The list of currently available job offers displays.

5. Select a **Job Offer**.

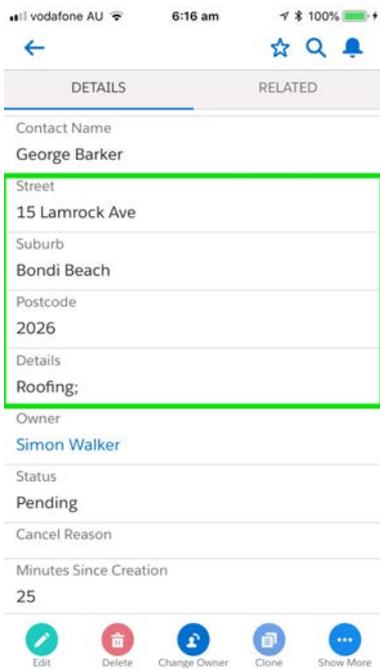


The **Job Offer** opens.

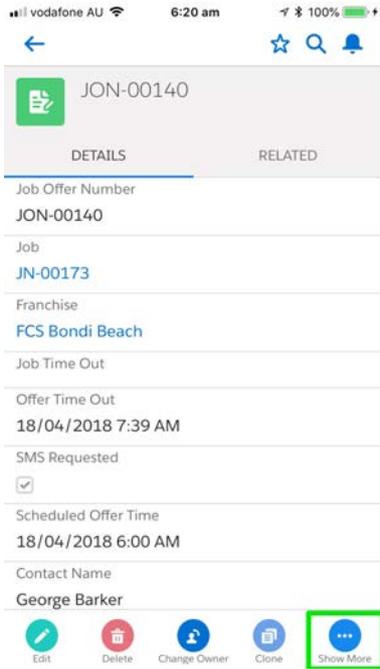
6. You have a Job Offer open in the mobile Salesforce app.



7. Scroll down to view the location and job details.

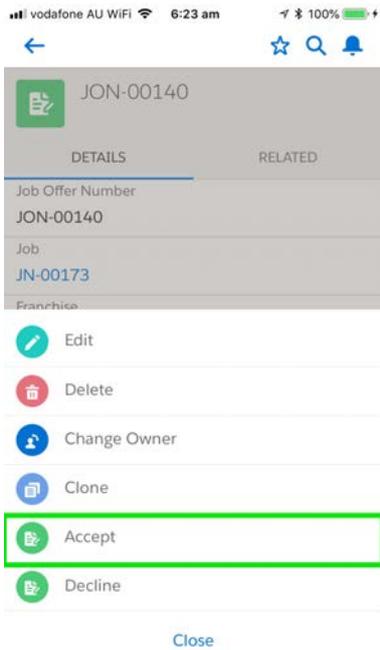


8. When you want to accept the job offer, press **Show more**.



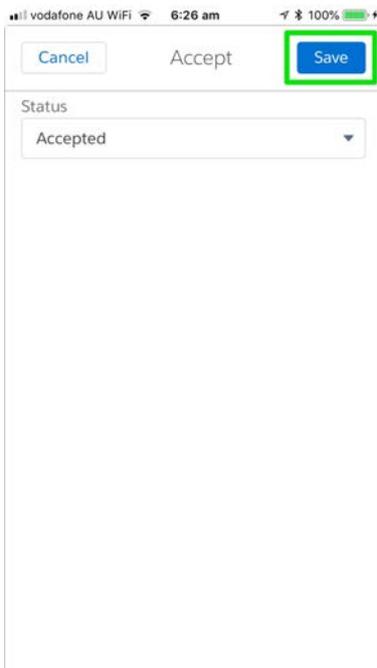
The **Show more** menu displays.

9. Press **Accept**.



The **Accept** dialog box opens.

10. Press Save.



You have now accepted the Job Offer.



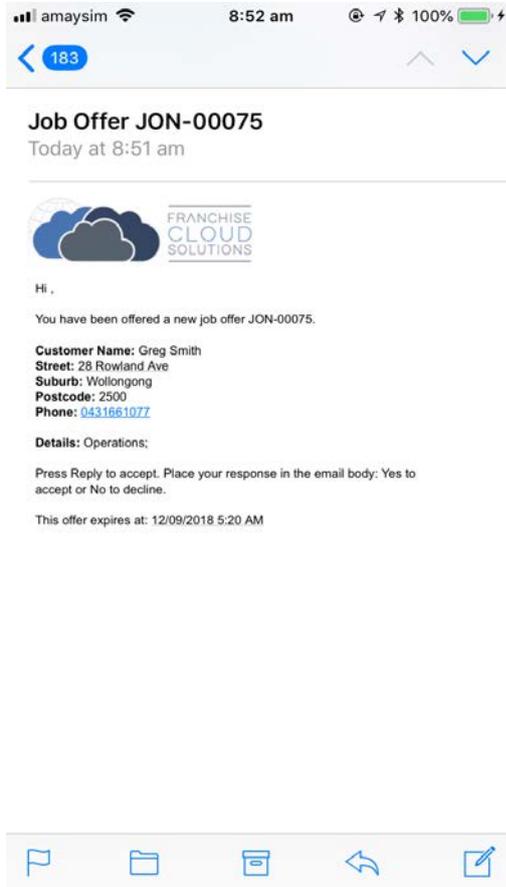
The Job is now ready for you to begin working. See “Working with Jobs” on page cii.

How to respond to job offers by email

Business Management can be configured to send Job Offers by email.

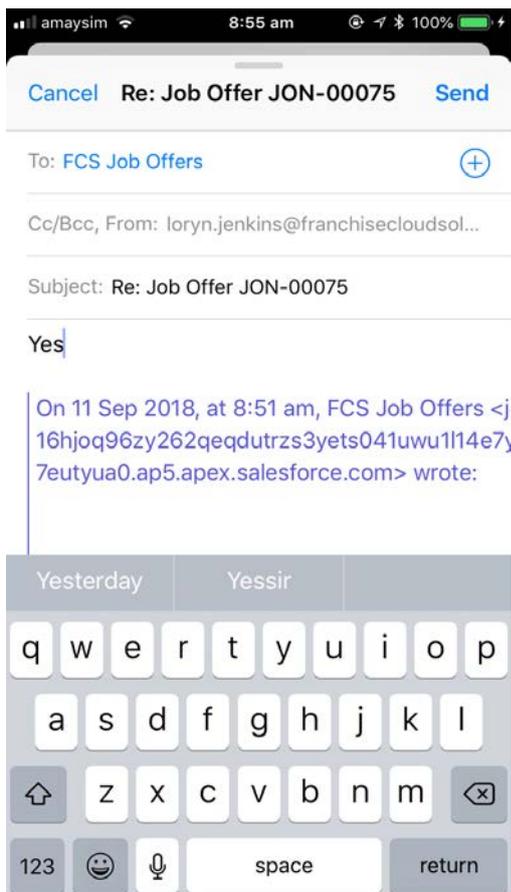
To respond to job offers by email

1. Open the email containing the job offer.



2. Review the location and job details.

- When you are ready to accept the job offer, press **Reply**, enter your response within the email body, then press **Send**.



The first word in the email body is taken as the response.

- » *Yes* accepts the job.
- » *No* declines the job.



Other ways of writing “Yes” are

- » *y, yes, yeah, accept, ok*
- and other ways of writing “No” are
- » *n, no, sorry, nah, refuse*



This topic assumes your system is configured to send job offers to your mobile phone. See “How to change where job offers are sent” on page xliii.



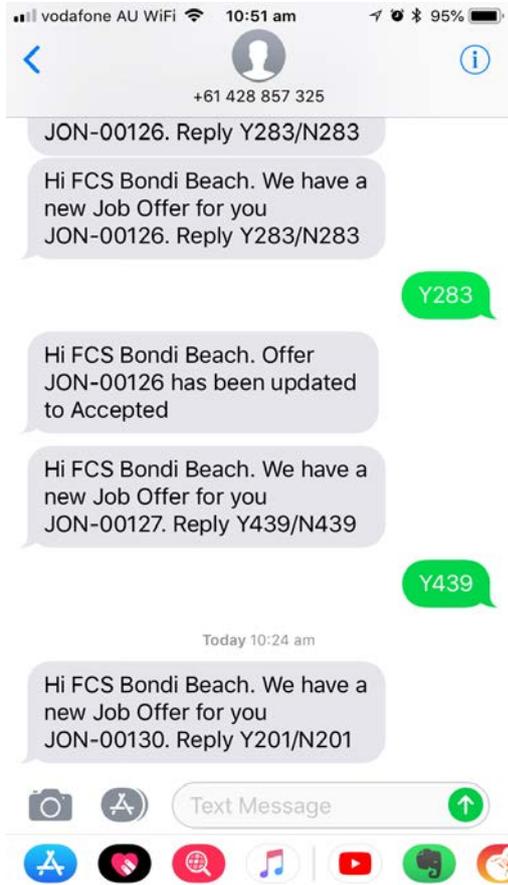
All email and SMS messages shown in this document are examples only. Messages you receive are customized for your business during implementation, and may contain information different from that shown here.

How to respond to job offers by SMS

Business Management can be configured to send Job Offers by SMS.

To respond to job offers using SMS

1. When you are sent an SMS job offer, it provides “Yes” and “No” response codes.



2. When you are ready to accept the job, send the accept reply code.

 In this case, the accept reply code is *Y201*.

When the Job Allocation Engine receives your reply and allocates you the job, it will send you an acceptance message.

 The Job is now ready for you to begin working. See “Working with Jobs” on page cii.

 SMS is an optional feature offered by Franchise Cloud Solutions. Check with your field manager to see if your organization has licensed SMS Management.



This procedure assumes your system is configured using *2-way SMS* & *Email*.

See “How to change where job offers are sent” on page xliii.



All email and SMS messages shown in this document are examples only. Messages you receive are customized for your business during implementation, and may contain information different from that shown here.

CHAPTER 6

Working with Jobs

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How to handle variations clxxviii
Customer quote acceptance clxxx

Understanding jobs

When someone contacts your franchisor with a request for work, a Job will be created. Your franchisor will then send a Job Offer to you (or another franchisee). When you accept a Job Offer, the Job will be assigned to you.

When customers contact you directly about doing a job for them, you will create your own Job record.

Whether created by the franchisor or created by yourself, the Job is the beating heart of Business Management.

Information stored on a job

The job initially contains the customer's contact details and select details about the service they inquired about.

As you make contact with the customer, obtain more information about what they want, make plans and schedules, make notes and take photos, create and send quotes and invoices—all this information (and more) is captured and organized by the Job record.

The Job record provides a current snapshot of the Job. It also records the history as to what has occurred on the Job.

Actions available from a job

As well as storing information about a job, each job gives tools and actions to help you complete your work.

Tool or Action	Description
Match Customer	A dialog box that checks to see whether the customer described in this job might match an existing customer. After reviewing the information, you can choose whether to link this job to an existing customer account or to create a new customer account.
Plan Job	A page in which you can name and describe all the detail lines to appear on any quote or invoice, and in which you can plan all the tasks and materials, and develop cost and price estimates.
Schedule Job	A job calendar that allows you to plan when and by whom the job will be completed.
Job Material Shopping List	Uses the Job Plan to produce a report listing all the material you need to buy so that you can complete the job.

Tool or Action	Description
Invoice Job	A dialog box that uses information in the Job Plan to generate an invoice. You can generate full invoices, line-by-line or custom invoices. These choices gives you the flexibility to issue full invoices, partial invoices, or progress invoices. You can generate the invoice as a PDF that can be downloaded, sent to customer via an email, or attached to the Job record.
Credit Job	The ability to raise a credit note. This allows you to adjust an issued invoice or to provide an instrument for your customer to claim a credit for future work. If you are integrated with Xero, it is recommended that credit notes be raised in Xero (they will be synchronized back to Business Management).
Supplier Invoice	The ability to record an invoice from a supplier, allowing you to track sub-contractor or material expenses for a job. Recording this information is essential for tracking job-based profitability.
Notes	From Salesforce Mobile or from the Files/Notes tab, you can record notes about the job. This can be useful way of noting customer requests or job conditions.
Photographs	From Salesforce Mobile, you can take photographs relating to the job. These photographs are stored as attachments (on the Files/Notes tab), and can be optionally included in quotes or invoices.
Email	The Activity box on the Job Details page allows you to send job-related emails to the customer or to suppliers. The contents of each email are logged against the job.
Audits	Some implementations will make use of one or more standard audits. Audits provide a survey format that allows you to record answers to structured questions. It is quite useful for recording compliance details at different Job Statuses. Your use of the audits feature is dependent on your implementation.

Statuses of a job

Job Statuses provide a convenient way to keep track of the status of each job. The pathway near the top of the Job Details page provides a visual indicator of the current status of the job.



Automatic and manual Job Statuses

By managing jobs through each status, Business Management helps you focus on delighting your customers and growing your business.

Many Job Statuses are set automatically.



For example, creating a Job Plan automatically places the Job's *Status* into *Planning*.

Other Job Statuses allow you to manually set the *Status* or the *Substatus* fields.



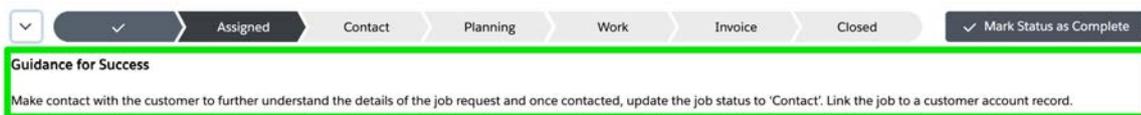
For example, if you have Contacted the customer, you need to record the outcome of the contact using the *Substatus* fields. It allows you to describe whether the contact was Attempted, Successful, On Hold, or whether there is a Pending or Completed Site Visit.

Guidance for success

You can discover what actions and activities are related to each status by toggling the **Show more** button on the status pathway.



When toggled, you can see the **Key Fields** and **Guidance for Success** pane.



It can be helpful to check **Guidance for Success** to prompt what needs to be done at each status.

Standard and Repeating Jobs

By default, all jobs are created as Standard Jobs. Standard Jobs can generate one or more invoices up to the value of the Job Plan. Once the job has been fully invoiced and paid, it is closed.

In contrast, Repeating Jobs can be invoiced repeatedly over time. They are ideal for jobs like mowing, weeding, teaching and any other types of services that are provided regularly.



You make a repeating job by placing a check mark in the *Repeating Job* field.

Job status summary

The top-level Job Statuses are described below.

Job Status	Description
Unassigned	A newly-created job before it is assigned to a franchise.
Assigned	A job newly-assigned to a franchise before any attempt to contact the customer has occurred.
Contact	All customer contacts (including attempted contacts) and necessary site visits.
Planning	Determine the tasks, costs and personnel required to complete the job. Schedule the personnel. If a quote is required, generate the quote. Customer accepts the quote.
Work	Work is ready to be scheduled, has commenced, is in progress or is completed.
Invoice	At least one invoice has been generated. Customer has made payments on the invoice. Customer has fully paid the invoice, or the invoice is in dispute.
Closed	The job is complete and payments have been received. The job may automatically close when all invoices attached to the job are fully paid.

Job Substatuses are described below.

Job Status	Substatus	Transition	Description
Assigned	--None--	Auto	Job has been assigned to a franchisee. Franchisee is yet to make contact with the customer.
	Manually Allocated	Auto	Job has been force allocated to a Franchisee. Franchisee is yet to make contact with the customer.
Contact	Attempted	Manual	Franchisee has attempted contact (called, sent text or email) without yet making contact.
	Successful	Manual	Franchisee has made contact with the customer.
	Site Visit Pending	Auto	Franchisee has scheduled a site visit. Good practice is to ensure the site visit is recorded within the Job Calendar.
	Site Visit Completed	Manual	Franchisee has visited the site.
	On Hold	Manual	<p>The Job has been temporarily placed on hold for a range of reasons that prevent it proceeding.</p> <p>For example, the customer may be out of town or otherwise unresponsive to contacts.</p> <p>(When it is clear the Job will never proceed, change status to <i>Closed: Not Proceeding</i>.)</p>

Job Status	Substatus	Transition	Description
Planning	In Progress	Auto	Job Planning causes transition. When you begin Job Planning, the system will automatically progress to this Substatus.
	Completed	Manual	Switch to this Substatus when you have completed the Job Planning process.
	Quote Sent	Auto	Quote Job, Email Send causes transition. When you have sent the Quote, system will switch to this Substatus.
	Quote Accepted	Manual	When customer indicates acceptance of quote, manually set to this Substatus.
	On Hold	Manual	When circumstances arise that prevent you from proceeding with Job Planning (e.g. customer unable to provide sufficient information) place it On Hold.

Job Status	Substatus	Transition	Description
Work	Pending	Manual	<p>Indicates work is being delayed. Reasons include:</p> <ul style="list-style-type: none"> » Waiting for a deposit » Waiting on material or a signature <p>Selecting a Substatus Reason is mandatory.</p>
	Scheduled	Conditional	<p>Work is scheduled.</p> <div style="border-left: 2px solid #0070C0; padding-left: 10px;">  <p>Automatic transition occurs if the Estimated Hours match Scheduled Hours with 1 hour of variance. Otherwise manual.</p> </div>
	In Progress	Manual	A user has clocked onto the job (from Job Calendar Mobile).
	Completed	Manual	A user has marked the job complete (from Job Calendar Mobile).
	On Hold	Manual	Work cannot proceed due to factors outside your control (e.g. waiting on other trades, customer denies access to work site, etc.)

Job Status	Substatus	Transition	Description
Invoice	In Progress	Auto	Invoice is generated causes transition. You have generated the invoice.
	Completed	Manual	Customer has paid the invoice. <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">  This status not used when Franchise Profile Account's Auto Close Job on Final Payment is checked. </div>
	Dispute	Manual	Customer is disputing the invoice.
Closed	Completed	Auto	Invoice is paid and the Franchise Profile Account's Auto Close Job on Final Payment is checked causes transition. All work is complete and invoice has been paid in full.
	Not Proceeding	Manual	Job will not proceed and is not being followed up.

- » All Sub Statuses having Auto transitions can also be placed in that Sub Status manually.
- » You can prevent automatic transitions from occurring by checking the Manual Status Update checkbox. This is extremely useful when you are part invoicing a job while work is still progressing. By checking Manual Status Update you can retain the status of *Work-In Progress* despite having put through a part invoice.

Working with new jobs

New jobs can come from either your franchisor sending you a Job Offer or from a new or existing customer directly contacting you.

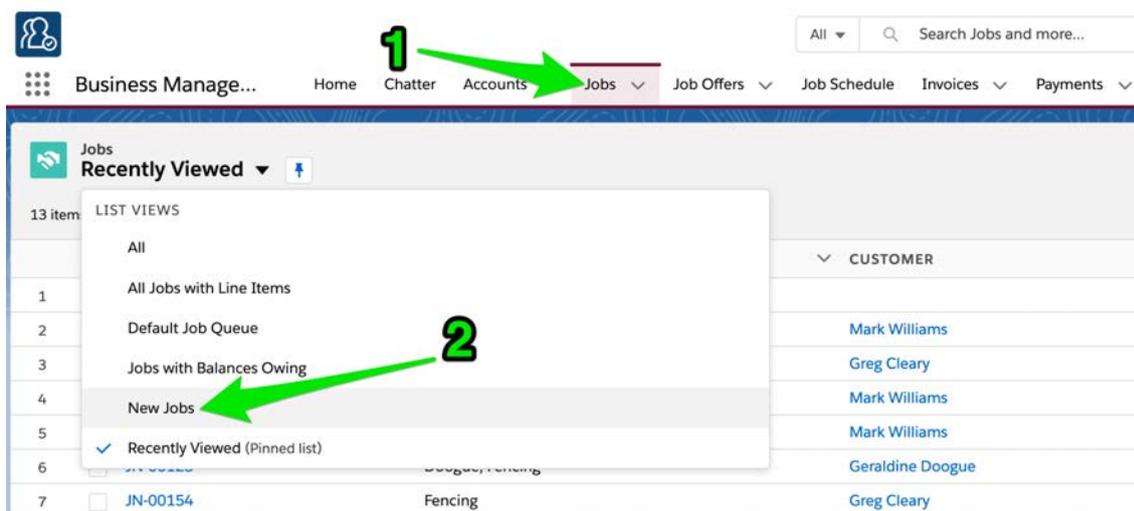
- » When you accept a Job Offer, the Job is assigned to you.
- » You then need to contact the prospect to see if this possible work can be turned into actual work.
- » When a customer contacts you, you need to add the Job to the system yourself.

How to find newly assigned jobs

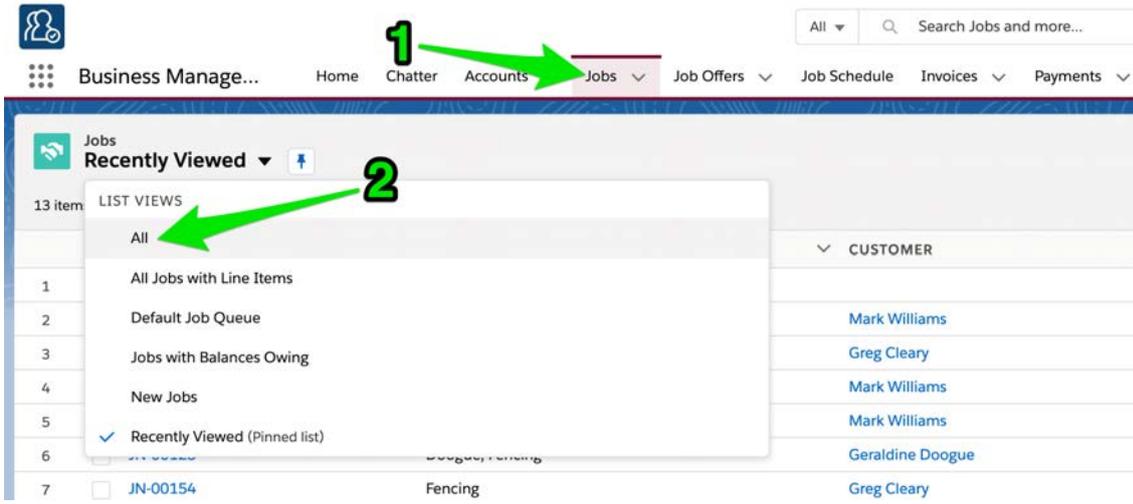
Jobs that have been assigned to you by your franchisor are placed on the **Jobs** tab.

To find newly assigned Jobs

1. Go to the **Jobs** tab.
2. If you created the list view named **New Jobs** (See “How to create your own list view” on page lxix), select the **New Jobs** list view.



3. Otherwise, select the **All** list view, then look for the Jobs whose *Status* is *Assigned*.



First customer contact

When you first make contact with a customer, you will want to check that the

- » [job is named well](#)
- » [contact details and street address are correct](#)
- » [job details are captured and correct](#)
- » [job is matched to an account](#)
- » [customer communication preferences are captured](#)

Naming the job



It is helpful to develop a standard way of naming each job.

The most common way of naming a job is *Last name – Job Suburb*.

Name the jobs in a way that works for you.

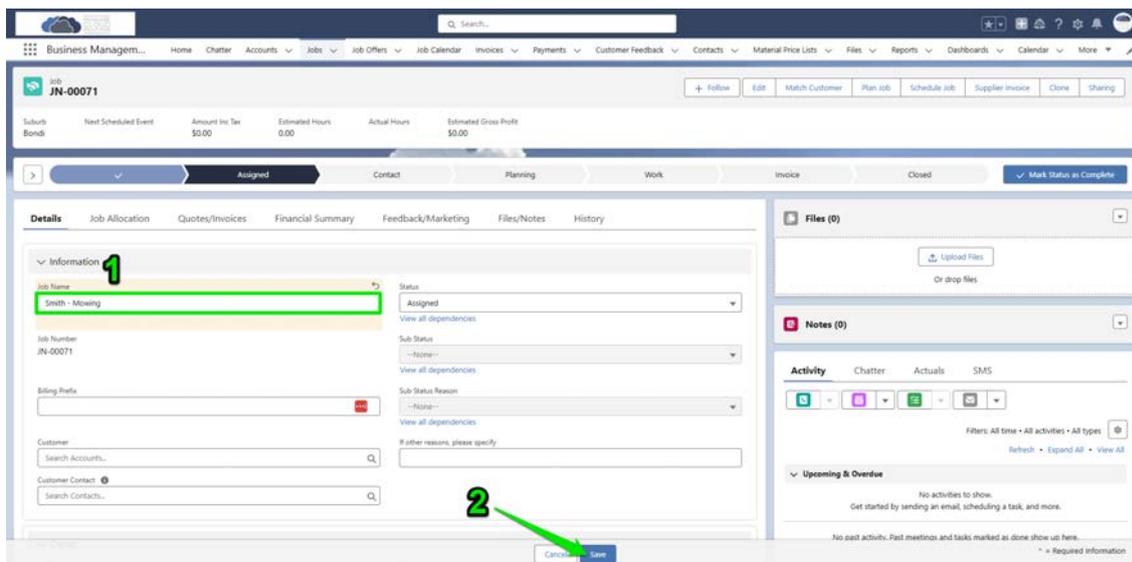
To name a job

1. Press any **Edit** button to make the fields editable.

The screenshot shows a software interface for managing jobs. The top navigation bar includes 'Business Management...' and various menu items like 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', 'Material Price Lists', 'Files', 'Reports', 'Dashboards', and 'Calendar'. The main content area displays job details for 'JN-00071'. The job is currently in 'Assigned' status. A green arrow points to the 'Edit' button in the top right corner of the job details section. The form is in edit mode, with fields for 'Job Name', 'Job Number', 'Billing Profile', 'Customer', 'Customer Contact', 'Franchise', and 'Territory Category' all being editable. The 'Status' field is currently set to 'Assigned'. The 'Owner' field is set to 'Bill Smith'. The 'Job Accepted Notification Sent' checkbox is checked. The right sidebar contains sections for 'Files (0)', 'Notes (0)', 'Activity', 'Chatter', 'Actuals', and 'SMS'. The 'Activity' section shows a filter for 'All time' and 'All activities'.

The form switches into edit mode.

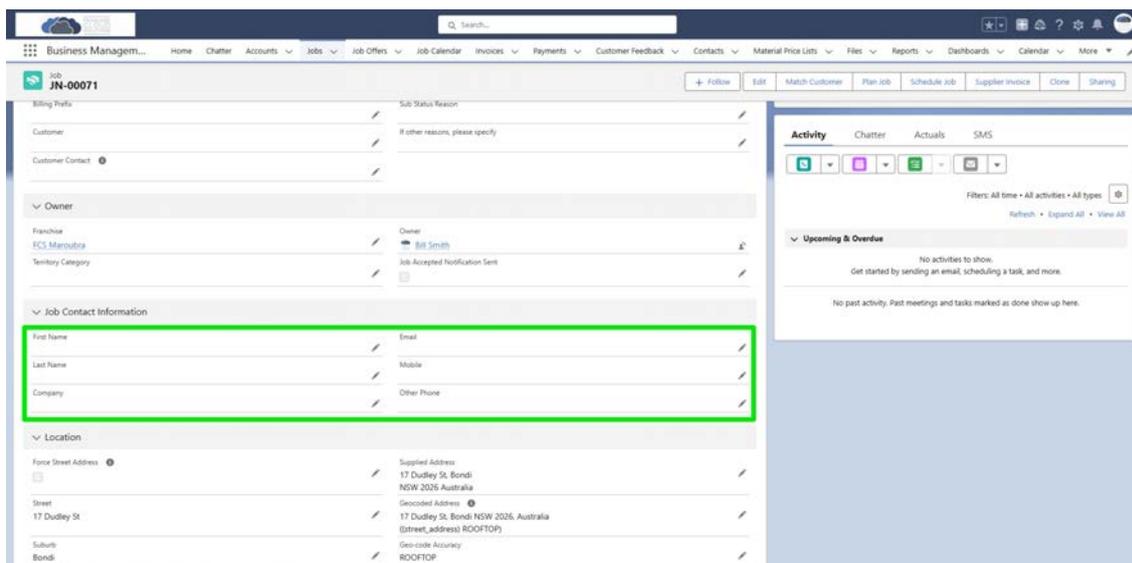
2. Enter the Job Name and press **Save**.



Reviewing job contact information

To update Job Contact Information

1. Capture any missing customer details.



2. Under the **Location** section, confirm whether the street address is correct. If the street name needs to be customized, check **Force Street Address** and then edit the street name.

The screenshot shows the 'Location' section of a job form for 'JN-00071'. The 'Force Street Address' checkbox is checked, indicated by a green arrow and the number 1. The 'Street' field contains 'Unit 1, 17 Dudley St', also indicated by a green arrow and the number 2. The 'Save' button at the bottom right is highlighted with a green arrow and the number 3. Other fields include 'Company', 'Other Phone', 'Suburb' (Bondi), 'State' (NSW), 'Postcode' (2026), 'Country' (Australia), 'Geocoded Address', 'Geo-code Accuracy' (ROOFTOP), 'Location' (Latitude: -33.8960455, Longitude: 151.2707625), and 'Territory' (Territory (2) - Bondi).



The check mark in **Force Street Address** will disappear after save. To change the street address again, check it and then make your changes.

Confirming job details

You may also want to review the job information and explore key customer expectations.

To update any Job Detail field

1. Update any relevant details and press **Save**.

The screenshot displays the 'Job Details' form for job ID JN-00071. The form is organized into several sections:

- Address and Location:** Unit 1, 17 Dudley St; 17 Dudley St, Bondi NSW 2026, Australia (Street Address); ROOFTOP (Geo-code Accuracy); Bondi (Suburb); NSW (State); 2026 (Postcode); Australia (Country); -33.8960435 (Latitude); 151.2707625 (Longitude); Territory (Territory (2) - Bondi); Territory Franchisee (This field is calculated upon save); Territory Status (Unassigned; This field is calculated upon save).
- Job Description:** Job Description (Mow front and back.); Request Type (Quote Request); More Information; Due Date.

At the bottom of the form, there are 'Cancel' and 'Save' buttons. A green arrow points to the 'Save' button. The 'Save' button is highlighted in blue, indicating it is the active action.

Matching customer contact details

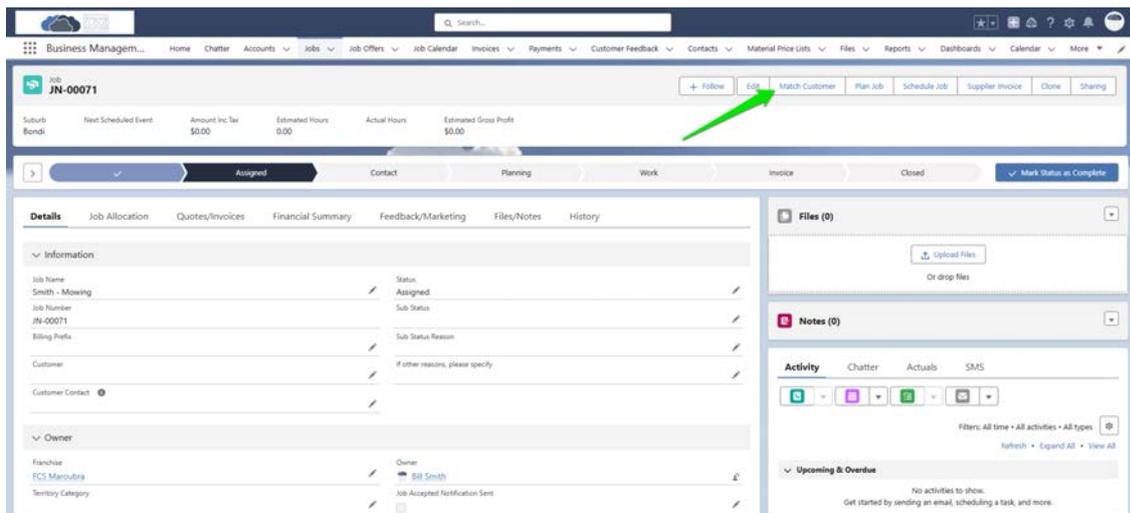
Having confirmed and updated any necessary details, now you need to either

- » use the job to create a new customer account, or
- » link the job to an existing customer account.

You do either of these using **Match Customer**.

To match the customer to an account

1. From the Job, press **Match Customer**.



2. The **Customer Matching** dialog box displays.



Use the information to determine whether this job should be linked to an existing customer, or whether it should be created as a new customer account.

3. To link to an existing customer account, choose the existing customer then press **Match**.

The screenshot shows the 'Customer Matching' dialog box. It has a 'Potentially Matching Contacts' section with a table of contacts. The first contact is 'Geoff Smith' with phone number '0404828404' and email 'gsmith@gmail.com'. A green arrow points to the 'Match' button at the bottom right of the dialog box. The 'Customer Details' section is also visible, with fields for 'Account Type', 'First Name', 'Last Name', 'Email', 'Mobile', 'Other Phone', 'Street', 'Suburb', 'Postcode', 'Country', and 'State'.

4. To create a new customer account, press the **New** button.

The screenshot shows the 'Customer Matching' dialog box. It has a 'Potentially Matching Contacts' section with a table of contacts. The first contact is 'Geoff Smith' with phone number '0404828404' and email 'gsmith@gmail.com'. A green arrow points to the 'New' button at the bottom right of the dialog box. The 'Customer Details' section is also visible, with fields for 'Account Type', 'First Name', 'Last Name', 'Email', 'Mobile', 'Other Phone', 'Street', 'Suburb', 'Postcode', 'Country', and 'State'.

5. The Customer is now added to the Job.

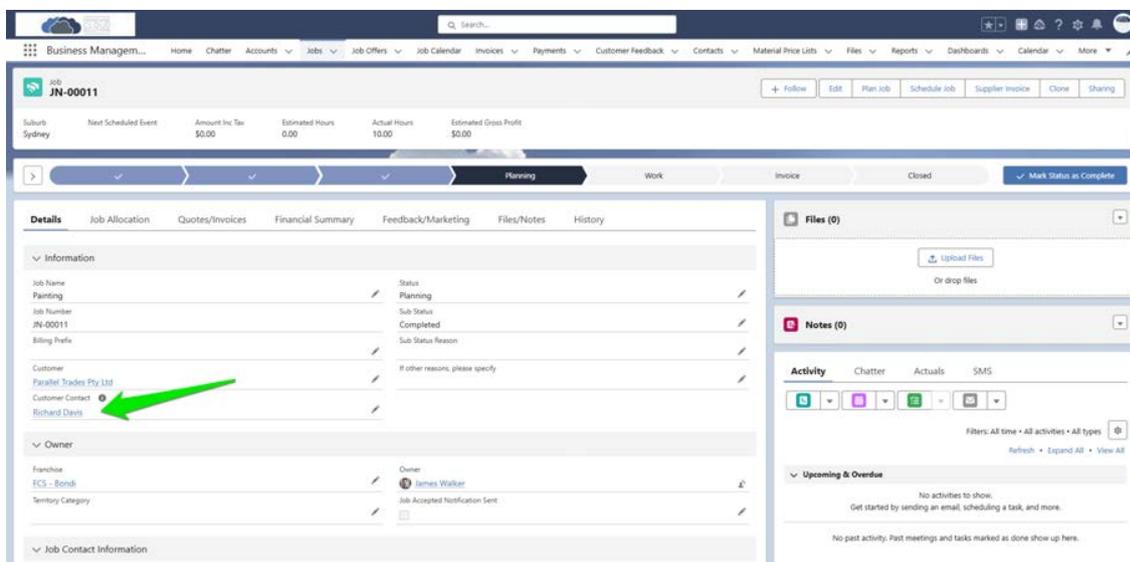
The screenshot displays the 'Business Management' software interface for a specific job, 'JN-00071'. The top navigation bar includes various menu items like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, Material Price Lists, Files, Reports, Dashboards, and Calendar. Below the navigation, there are buttons for '+ Follow', 'Edit', 'Match Customer', 'Plan Job', 'Schedule Job', 'Supplier Invoice', 'Clone', and 'Sharing'. A summary row shows 'Suburb Bonds', 'Next Scheduled Event', 'Amount Inc Tax \$0.00', 'Estimated Hours 0.00', 'Actual Hours', and 'Estimated Gross Profit \$0.00'. A progress bar at the top indicates the job is in the 'Assigned' stage, with other stages like Contact, Planning, Work, Invoice, and Closed visible. The main content area is divided into tabs: 'Details', 'Job Allocation', 'Quotes/Invoices', 'Financial Summary', 'Feedback/Marketing', 'Files/Notes', and 'History'. The 'Details' tab is active, showing a form with fields for 'Information' and 'Owner'. The 'Customer' field is highlighted with a green box and contains the name 'Geoff Smith'. Other fields include 'Job Name' (Smith - Mowing), 'Job Number' (JN-00071), 'Billing Profile', 'Status' (Assigned), 'Sub Status', 'Sub Status Reason', 'If other reasons, please specify', 'Franchise' (ECS Maroubra), and 'Owner' (Bill Smith). On the right side, there are sections for 'Files (0)', 'Notes (0)', 'Activity' (with tabs for Chatter, Actuals, SMS), and 'Upcoming & Overdue'.

Updating marketing information and customer communications preferences

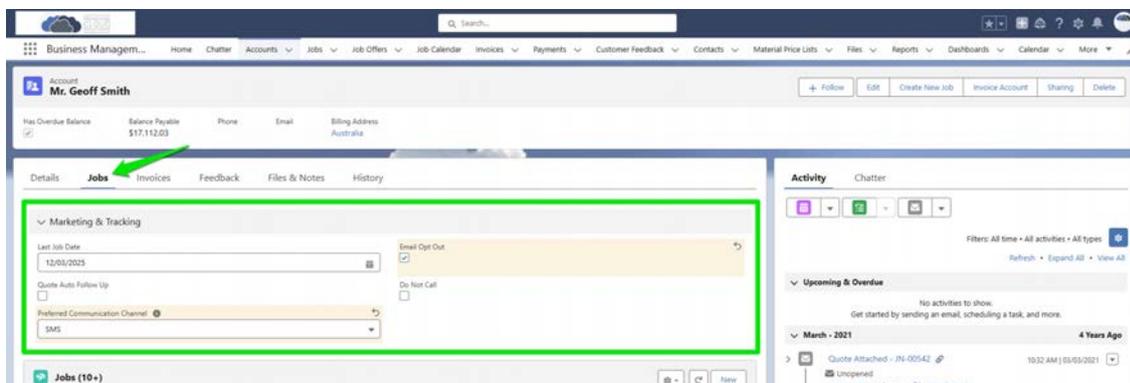
When you set up an account, it is useful to capture customer communications preferences.

To update the marketing information and customer communications preferences

1. If you are on the **Job**, click through to the **Customer** account.



2. Click on the **Jobs** tab. Under the **Marketing & Tracking** section, update the relevant details and press **Save**.

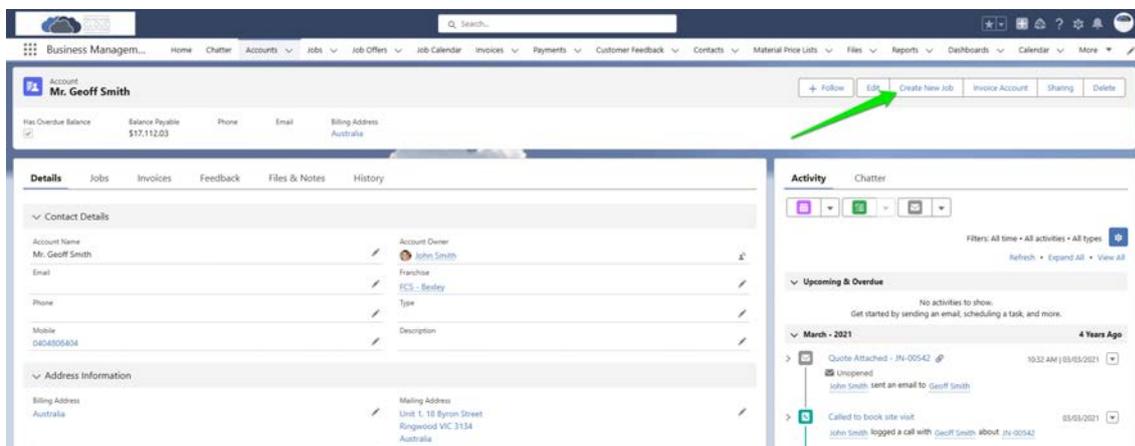


How to create a new job

When new customers contact you directly or existing customers want you to do some work, you will want to create a new job. The best way to do this is to start with (or create) the **Account**, then from there to create the new **Job**.

To create a new Job

1. Search to see if the customer is already in your system, See “When a customer contacts you” on page lxxviii.
2. If you need to create a new customer account
 - » See “How to create an account for an individual customer” on page lxxix, or
 - » See “How to create an account for a business” on page lxxx
3. Now with the customer account in front of you, press **Create New Job**.



4. The **Create New Job** dialog box displays. Fill out the customer details.

The 'Create New Job' dialog box is shown. It has a title bar 'Create New Job'. The 'Customer' field is filled with 'Geoff Smith'. The 'Franchise' field is filled with 'FCS - Bexley'. The 'Status' field is set to 'Assigned'. The 'Street' field is filled with 'Unit 1, 18 Byron Street'. The 'Suburb' field is filled with 'Ringwood'. The 'Postcode' field is filled with '3134'. The 'Country' field is set to 'Australia'. The 'State' field is set to 'VIC'. The 'Job Description' field is empty. The 'More Information' field is empty. The 'Cancel' and 'Save' buttons are visible at the bottom.

5. Enter any information about the job in the **Job Description** field, then press **Save**.

Create New Job

FCS - Bexley

First Name: Geoff

Last Name: Smith

Company:

Email: gsmith@gmail.com

Mobile: 0404808404

Other Phone:

*Status: Assigned

Street: Unit 1, 18 Byron Street

Suburb: Ringwood

Postcode: 3134

Country: Australia

State: VIC

Job Description: Wants several rooms painted inside the house. Needs a quote.

More Information:

Cancel Save



It is really important that the **Job Contact Information** include the actual address of the job. The address of the job may very well be different from the Customer's mailing address (which is where you send the invoice). Capturing the correct job address affects the Job's **Territory & Location Information**.

6. The system displays the **Account**, with the created job in a message. Click the job number to see the new Job.

Business Management... Home Chatter Accounts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Contacts Material Price Lists Files Reports Dashboards Calendar More

Account Mr. Geoff Smith

Job "JN-00637" was created.

Has Overdue Balance Balance Payable \$17,112.03 Phone Email Billing Address Australia

Details Jobs Invoices Feedback Files & Notes History

Activity Chatter

Filter: All time • All activities • All types

Upcoming & Overview

No activities to show.

Get started by sending an email, scheduling a task, and more.

March - 2021 4 Years Ago

Quote Attached - JN-00542 10:52 AM (03/03/2021)

Unopened John Smith sent an email to Geoff Smith

Called to book site visit John Smith logged a call with Geoff Smith about JN-00542 03/03/2021

Contact Details

Account Name: Mr. Geoff Smith

Account Owner: John Smith

Email:

Franchise: FCS - Bexley

Phone:

Type:

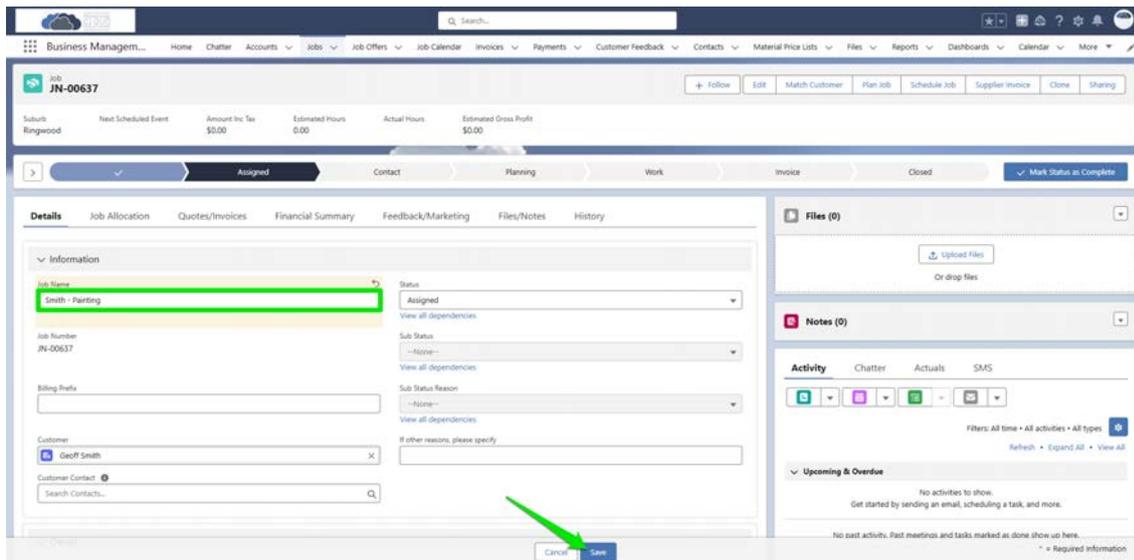
Mobile: 0404808404

Description:

Billing Address: Australia

Mailing Address: Unit 1, 18 Byron Street, Ringwood VIC 3134, Australia

7. Edit the Job Name and press Save.



The screenshot shows the 'Details' tab for job JN-00637. The 'Job Name' field is highlighted with a green box and contains 'Smith - Painting'. A green arrow points to the 'Save' button at the bottom right of the form.



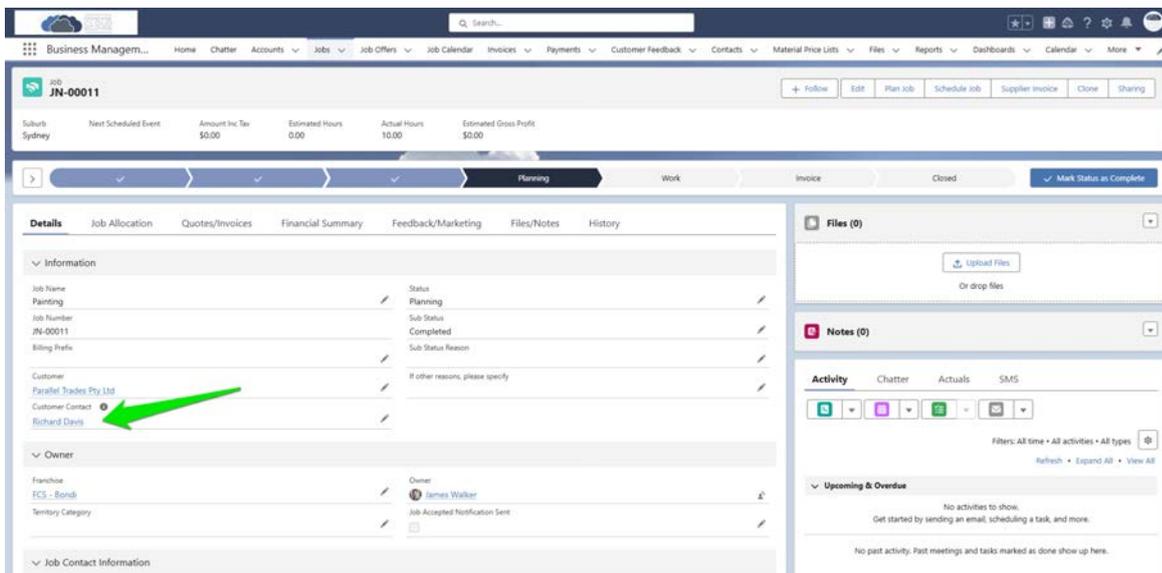
It is helpful to develop a standard way of naming each job.

The most common way of naming a job is *Last name - Job Suburb*.

Choose a customer contact for a business job

When you create jobs related to individual customer accounts, it is assumed that there is one point of contact. However, when you create a job related to a business account, there are multiple contacts on the account.

To ensure you know which contact is responsible for this job, you can nominate one of the business account's contacts as being the customer contact.



The screenshot shows the 'Details' tab for job JN-00011. The 'Customer Contact' field is highlighted with a green box and contains 'Richard Davis'. A green arrow points to the 'Save' button at the bottom right of the form.



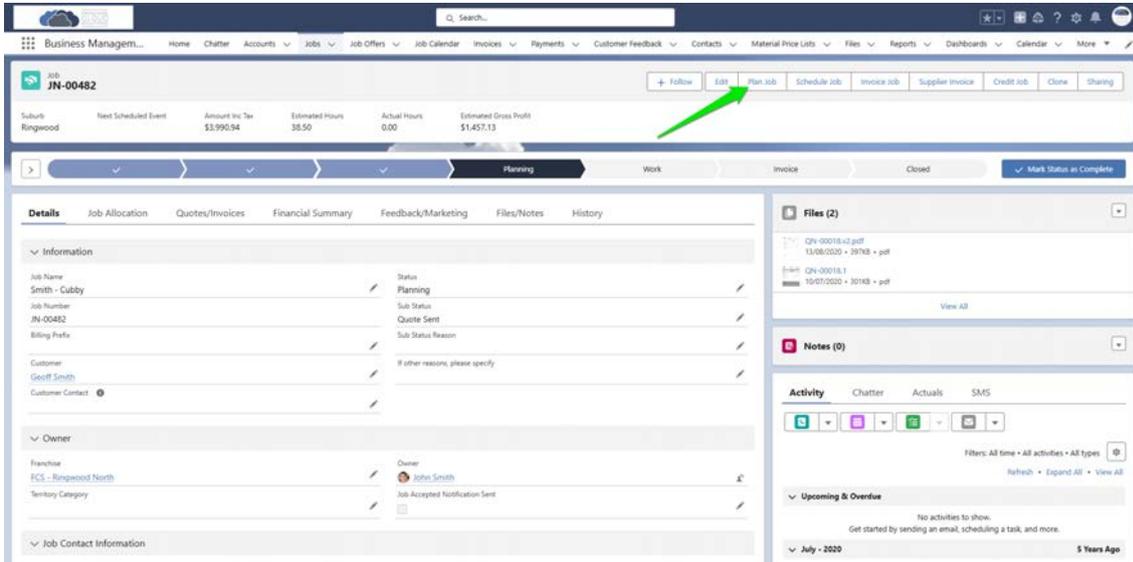
To add a customer contact to a job, the contact must be attached to the business account. For more information, See “How to add a contact to a business account” on page lxxxii.

Job planning and estimation

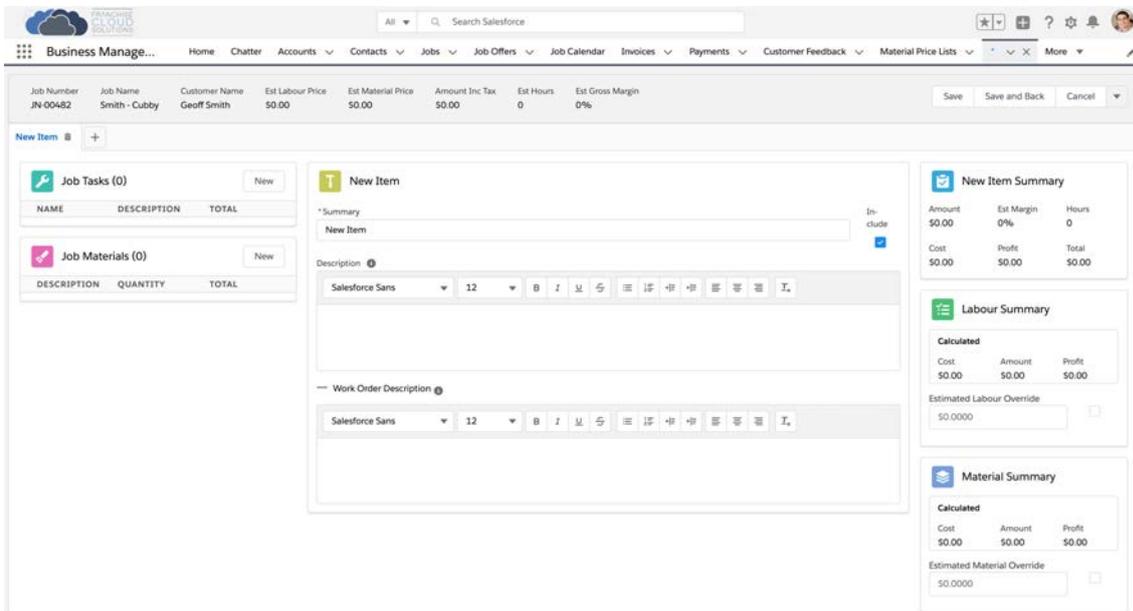
Business Management makes it easy to collect all the relevant information necessary to plan, estimate and schedule a job.

To start job planning

1. From the Job Details page, press Plan Job.



2. The Job Planning page appears.

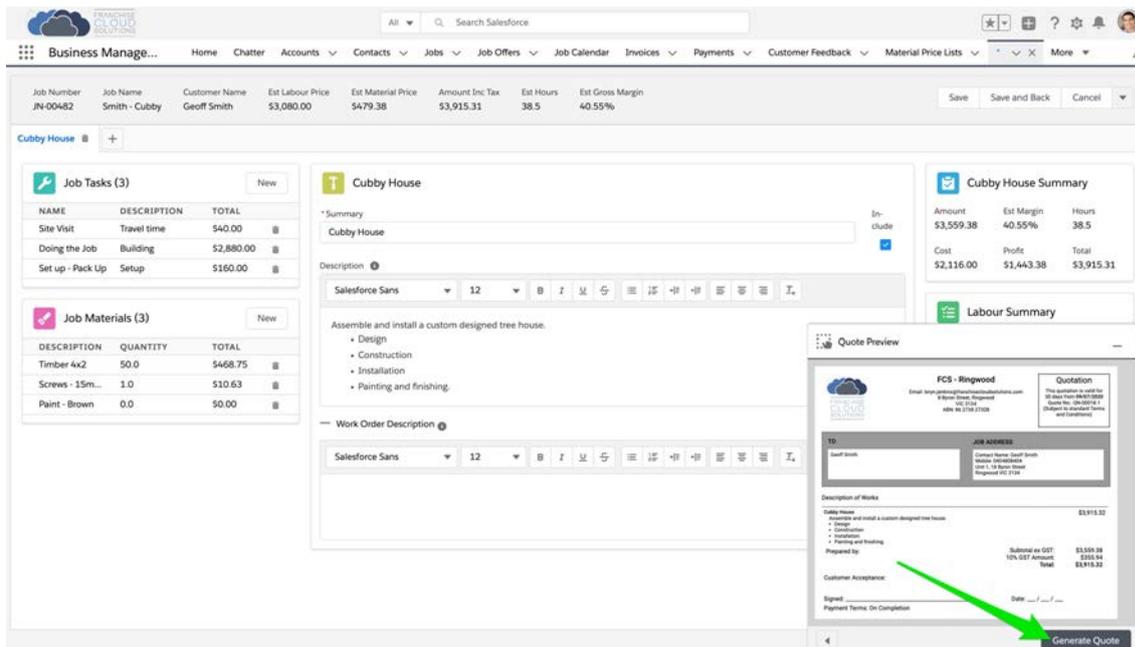


3. Perform your planning tasks.

- » “How to create a new line item” on page cxxxiii
- » “Detailed quote: Add job tasks and work estimates” on page cxxxviii

- » “Detailed quote: Add materials and material estimates” on page cxliii
- » “Quick quote: Adjust labour and material summaries” on page cxxxvi
- » “How to exclude a line item” on page cliv
- » “How to return to the Job” on page clxxv
- » “How to use a job template” on page cliv

4. When you’re ready to send a quote, press **Save** to make the Quote Preview window appear. Click the **Expand**  button and click **Generate Quote**.



The screenshot shows the Salesforce Business Manager interface for a job named 'Cubby House'. The main window displays job details, including job number JN-00482, customer name Geoff Smith, and estimated labour price of \$3,080.00. A 'Job Tasks' table lists activities like 'Site Visit' and 'Doing the Job'. A 'Job Materials' table lists items like 'Timber 4x2' and 'Screws - 15m...'. A 'Cubby House Summary' table shows an estimated amount of \$3,559.38 and a gross margin of 40.55%. A 'Labour Summary' table shows a total of \$3,915.31. A 'Quote Preview' window is open, showing a summary of the quote with a total of \$3,915.32. A green arrow points to the 'Generate Quote' button at the bottom right of the quote preview window.

For more information on sending a quote, See “How to send a quote” on page clvii.

To return to the job

1. Press the **Save and Back** button.

The screenshot shows the Salesforce Business Management interface for a job named 'Cubby House'. At the top, there is a navigation bar with tabs for Home, Chatter, Accounts, Contacts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Material Price Lists, and More. Below this, a summary bar displays job details: Job Number JN-00482, Job Name Smith - Cubby, Customer Name Geoff Smith, Est Labour Price \$3,080.00, Est Material Price \$479.38, Amount Inc Tax \$3,915.31, Est Hours 38.5, and Est Gross Margin 40.55%. Action buttons for Save, Save and Back, and Cancel are visible. The main content area is divided into several sections: 'Job Tasks (3)' with a table of tasks like Site Visit, Doing the Job, and Set up - Pack Up; 'Job Materials (3)' with a table of materials like Timber 4x2, Screws - 15m..., and Paint - Brown; 'Cubby House' description field with a rich text editor; and three summary cards: 'Cubby House Summary' (Amount \$3,559.38, Est Margin 40.55%, Hours 38.5), 'Labour Summary' (Calculated Cost \$1,732.50, Amount \$3,080.00, Profit \$1,347.50), and 'Material Summary' (Calculated Cost \$383.50, Amount \$479.38, Profit \$95.88). A green arrow points to the 'Save and Back' button.

Understanding the job planning page

Job Planning helps you achieve multiple goals

- » Describe the products and services being offered to your customers
- » Identify all the tasks and materials required to complete the job
- » Establish the price at which you will offer your products and services
- » Assist you in understanding your anticipated gross margin

Here is a quick tour of the Job Planning page.

Summary line

The summary line provides information to the quote and invoice header.

The screenshot shows the 'Business Manager' interface. At the top, there is a navigation bar with options like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and Material Price Lists. Below this, a summary line is highlighted with a green box and labeled 'Summary line'. The summary line includes fields for Job Number (JN-00482), Job Name (Smith - Cubby), Customer Name (Geoff Smith), Est Labour Price (\$3,080.00), Est Material Price (\$479.38), Amount Inc Tax (\$3,915.31), Est Hours (38.5), and Est Gross Margin (40.55%).

The main content area is divided into several sections:

- Job Tasks (3):** A table with columns NAME, DESCRIPTION, and TOTAL.

NAME	DESCRIPTION	TOTAL
Site Visit	Travel time	\$40.00
Doing the Job	Building	\$2,880.00
Set up - Pack Up	Setup	\$160.00
- Job Materials (3):** A table with columns DESCRIPTION, QUANTITY, and TOTAL.

DESCRIPTION	QUANTITY	TOTAL
Timber 4x2	50.0	\$468.75
Screws - 15m...	1.0	\$10.63
Paint - Brown	0.0	\$0.00
- Cubby House Summary:** A summary card showing Amount (\$3,559.38), Est Margin (40.55%), and Hours (38.5). It also includes a table for Cost, Amount, and Profit.

Cost	Amount	Profit
\$2,116.00	\$1,443.38	\$3,915.31
- Labour Summary:** A card showing Calculated values for Cost (\$1,732.50), Amount (\$3,080.00), and Profit (\$1,347.50). It also includes an Estimated Labour Override field set to \$0.0000.
- Material Summary:** A card showing Calculated values for Cost (\$383.50), Amount (\$479.38), and Profit (\$95.88). It also includes an Estimated Material Override field set to \$0.0000.

Detail lines

Detail lines provide the name and description of quote line and invoice line detail.

The screenshot shows the 'Business Manager' interface, similar to the previous one, but with a 'Detail line' highlighted by a green box and labeled 'Detail line'. A green arrow points to the 'Fence Painting' button in the breadcrumb navigation, which is labeled 'Another detail line'. The detail line section is titled 'Cubby House' and contains a description: 'Assemble and install a custom designed tree house.' with sub-points: Design, Construction, Installation, and Painting and finishing. Below the description is a 'Work Order Description' field, which is currently empty.

The summary line and other sections (Job Tasks, Job Materials, Labour Summary, Material Summary) are visible in the background, providing context for the detail line.

What appears in the detail line appears on the quote. You add new detail lines by pressing the + button. You remove detail lines by pressing the delete button.

Business Management

Job Number: JN-00482, Job Name: Smith - Cubby, Customer Name: Geoff Smith, Est Labour Price: \$3,080.00, Est Material Price: \$479.38, Amount Inc Tax: \$3,915.31, Est Hours: 38.5, Est Gross Margin: 40.55%

remove detail line add detail line

Cubby House | Fence Painting | +

Job Tasks (3)

NAME	DESCRIPTION	TOTAL
Site Visit	Travel time	\$40.00
Doing the Job	Building	\$2,880.00
Set up - Pack Up	Setup	\$160.00

Job Materials (3)

DESCRIPTION	QUANTITY	TOTAL
Timber 4x2	50.0	\$468.75
Screws - 15m...	1.0	\$10.63
Paint - Brown	0.0	\$0.00

Cubby House Summary

Amount	Est Margin	Hours
\$3,559.38	40.55%	38.5
Cost	Profit	Total
\$2,116.00	\$1,443.38	\$3,915.31

Labour Summary

Calculated

Cost	Amount	Profit
\$1,732.50	\$3,080.00	\$1,347.50

Estimated Labour Override: \$0.0000

Material Summary

Calculated

Cost	Amount	Profit
\$383.50	\$479.38	\$95.88

Estimated Material Override: \$0.0000

You can see the profitability summary for each Detail Line.

Business Management

Job Number: JN-00482, Job Name: Smith - Cubby, Customer Name: Geoff Smith, Est Labour Price: \$3,080.00, Est Material Price: \$479.38, Amount Inc Tax: \$3,915.31, Est Hours: 38.5, Est Gross Margin: 40.55%

Cubby House | Fence Painting | +

Detail Line Summary

Cubby House Summary

Amount	Est Margin	Hours
\$3,559.38	40.55%	38.5
Cost	Profit	Total
\$2,116.00	\$1,443.38	\$3,915.31

Labour Summary

Calculated

Cost	Amount	Profit
\$1,732.50	\$3,080.00	\$1,347.50

Estimated Labour Override: \$0.0000

Material Summary

Calculated

Cost	Amount	Profit
\$383.50	\$479.38	\$95.88

Estimated Material Override: \$0.0000

Once you have the job fully costed, you may feel you need to override the prices.



You might want to override the price after negotiation with the customer.

You can rapidly do this using Estimated Labour Override and Estimated Material Override.

Price overrides

NAME	DESCRIPTION	TOTAL
Site Visit	Travel time	\$40.00
Doing the Job	Building	\$2,880.00
Set up - Pack Up	Setup	\$160.00

DESCRIPTION	QUANTITY	TOTAL
Timber 4x2	50.0	\$468.75
Screws - 15m...	1.0	\$10.63
Paint - Brown	0.0	\$0.00

Amount	Est Margin	Hours
\$1,981.82	0%	38.5
Cost	Profit	Total
\$2,116.00	-\$134.18	\$2,180.00

Calculated	Cost	Amount	Profit
	\$1,732.50	\$3,080.00	\$1,347.50
Estimated Labour Override Inc Tax			
	\$1740.0000		

Calculated	Cost	Amount	Profit
	\$383.50	\$479.38	\$95.88
Estimated Material Override			
	\$400.0000		



To override with a final negotiated price, make sure you check **Include Tax**. Leave **Include Tax** unchecked where you want tax to be applied on top of your price.

Job tasks

Job Tasks do not appear on any quote or invoice. They exist purely for the purposes of planning and estimation.

When you click on a Job Task, the Job Task detail appears in the middle of the editor.

1

NAME	DESCRIPTION	TOTAL
Site Visit	Travel time	\$40.00
Doing the Job	Building	\$2,880.00
Set up - Pack Up	Setup	\$160.00

Task Type	Task Description		
Doing the Job	Building		
Estimated Hours	Estimated Hourly Cost	Hourly Rate	Total
36	\$45.00	\$80.00	\$2,880.00

Amount	Est Margin	Hours
\$1,981.82	0%	38.5
Cost	Profit	Total
\$2,116.00	-\$134.18	\$2,180.00

Calculated	Cost	Amount	Profit
	\$1,732.50	\$3,080.00	\$1,347.50
Estimated Labour Override Inc Tax			
	\$1740.0000		

Calculated	Cost	Amount	Profit
	\$383.50	\$479.38	\$95.88
Estimated Material Override			
	\$400.0000		

When you are viewing a Job Task, you can return at any time to the Detail Line by clicking the Detail Line's tab (even when the tab is currently selected).

2. Click on the Detail Line tab to return...

1. When you are here...

NAME	DESCRIPTION	TOTAL
Site Visit	Travel time	\$40.00
Doing the Job	Building	\$2,880.00
Set up - Pack Up	Setup	\$160.00

DESCRIPTION	QUANTITY	TOTAL
Timber 4x2	50.0	\$468.75
Screws - 15m...	1.0	\$10.63
Paint - Brown	0.0	\$0.00

Task Type	Task Description
Doing the Job	Building

Estimated Hours	Estimated Hourly Cost	Hourly Rate	Total
36	\$45.00	\$80.00	\$2,880.00

Cubby House Summary

Amount	Est Margin	Hours
\$1,981.82	0%	38.5

Cost	Profit	Total
\$2,116.00	-\$134.18	\$2,180.00

Labour Summary

Calculated

Cost	Amount	Profit
\$1,732.50	\$3,080.00	\$1,347.50

Estimated Labour Override Inc Tax: \$1740.0000

Material Summary

Calculated

Cost	Amount	Profit
\$383.50	\$479.38	\$95.88

Estimated Material Override: \$400.0000

3. To the Detail Line

Cubby House

Summary

Cubby House

Description

Assemble and install a custom designed tree house.

- Design
- Construction
- Installation
- Painting and finishing.

Work Order Description

Job materials

Job Materials do not appear on any quote or invoice. They allow you to identify

- » what materials are to be used in any given job
- » the standard cost of that material and quantity required
- » the markup you want to apply (or, the price you want to sell it for)
- » whether or not the material is in stock

Job Material Line

Job Number: JN-00482 | Job Name: Smith - Cubby | Customer Name: Geoff Smith | Est Labour Price: \$1,581.82 | Est Material Price: \$400.00 | Amount Inc Tax: \$2,180.00 | Est Hours: 38.5 | Est Gross Margin: 40.55%

Job Tasks (3)

NAME	DESCRIPTION	TOTAL
Site Visit	Travel time	\$40.00
Doing the Job	Building	\$2,880.00
Set up - Pack Up	Setup	\$160.00

Job Materials (3)

DESCRIPTION	QUANTITY	TOTAL
Timber 4x2	50.0	\$468.75
Screws - 15m...	1.0	\$10.63
Paint - Brown	0.0	\$0.00

Cubby House - Timber 4x2 - Timber 4x2

Material: Timber 4x2

In Stock	Supplier	Quantity	Material Cost	Sub Total
	Bunnings	50	\$7.50	\$375.00

Sell Price	Markup(%)	Total
\$468.75	25	\$468.75

Cubby House Summary

Amount	Est Margin	Hours
\$1,981.82	0%	38.5

Cost	Profit	Total
\$2,116.00	-\$134.18	\$2,180.00

Labour Summary

Calculated		
Cost	Amount	Profit
\$1,732.50	\$3,080.00	\$1,347.50

Estimated Labour Override Inc Tax: \$1740.0000

Material Summary

Calculated		
Cost	Amount	Profit
\$383.50	\$479.38	\$95.88

Estimated Material Override: \$400.0000

Other functions

- » To return to the **Job**, press **Save and Back**.
- » To save any changes and remain within **Job Planning**, press **Save**.
- » To more rapidly create Job Plans, See “How to use a job template” on page cliv and See “How to clone a job” on page clxiv.
- » To add a new material, See “How to add a new material to a price list” on page cxlviii.
- » To print a materials shopping list, See “How to print a materials shopping list” on page clxxv.
- » To generate a quote, Producing customer quotations.
- » To invoice a job, See “Invoicing a job” on page ccxlix.

How to create a new line item

You can show multiple line items on a quotation or invoice by adding line items to the job plan.

To create a new line

1. Press the + button.

The screenshot shows the Business Management software interface for job JN-00144. At the top, there is a navigation bar with 'Business Manage...' and various menu items like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and More. Below this, a header bar displays job details: Customer Name (Danielle Anderson), Est Labour Price (\$1,330.00), Est Material Price (\$537.50), Amount Inc Tax (\$2,054.25), Est Hours (13.30), and Est Gross Margin (46.37%).

The main content area is titled 'Fencing' and features a '+', a minus sign, and a trash icon. A green arrow points to the '+' button. To the left, there are two summary tables: 'Job Tasks (3)' and 'Job Materials (2)'. The 'Job Tasks' table lists: Travel (\$50.00), Site Visit (\$80.00), and Erect fence (\$1,200.00). The 'Job Materials' table lists: Pickets (150.0, \$337.50) and Fence posts (12.0, \$200.00).

The central 'Fencing' section includes a 'Summary' field with 'Fencing' and an 'Include' checkbox. Below is a 'Description' field with a rich text editor containing 'Fence three sides of house lot.' and a 'Work Order Description' field with a rich text editor.

On the right, there are three summary cards: 'Fencing Summary' (Amount: \$1,867.50, Est Margin: 46.37%, Hours: 13.3), 'Labour Summary' (Calculated Cost: \$626.50, Amount: \$1,330.00, Profit: \$703.50), and 'Material Summary' (Calculated Cost: \$375.00, Amount: \$537.50, Profit: \$162.50). Each summary card also includes an 'Estimated [Category] Override' field with an 'Enter a value' input and a checkbox.

2. The New Item appears.

The screenshot shows the 'New Item' form in the Business Manager software. The form is titled 'New Item' and is part of a job 'JN-00144'. The job details include Customer Name: Danielle Anderson, Est Labour Price: \$1,330.00, Est Material Price: \$537.50, Amount Inc Tax: \$2,054.25, Est Hours: 13.30, and Est Gross Margin: 46.37%. The form is divided into several sections: 'Job Tasks (0)', 'Job Materials (0)', 'Summary', 'Labour Summary', and 'Material Summary'. The 'Summary' section shows calculated values for Amount (\$0.00), Est Margin (0%), and Hours (0). The 'Labour Summary' and 'Material Summary' sections also show calculated values for Cost, Amount, and Profit, all set to \$0.00. The 'Description' field is currently empty, and the 'Work Order Description' field is also empty.

3. Now name the line by entering information into the Summary and Detailed Description fields.

The screenshot shows the 'Painting' form in the Business Manager software. The form is titled 'Painting' and is part of a job 'JN-00144'. The job details are the same as in the previous screenshot. The form is divided into several sections: 'Job Tasks (0)', 'Job Materials (0)', 'Painting Summary', 'Labour Summary', and 'Material Summary'. The 'Painting Summary' section shows calculated values for Amount (\$0.00), Est Margin (0%), and Hours (0). The 'Labour Summary' and 'Material Summary' sections also show calculated values for Cost, Amount, and Profit, all set to \$0.00. The 'Description' field is now filled with the text: 'Paint fence in Dulux "Flooded Gum" grey.' The 'Work Order Description' field is also empty.

4. Remember to Save.

Business Manage... Home Chatter Accounts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Contacts More

JN-00144 Save Save and Back Invoice Job Cancel

Customer Name Est Labour Price Est Material Price Amount Inc Tax Est Hours Est Gross Margin
Danielle Anderson \$1,330.00 \$537.50 \$2,054.25 13.30 46.37%

Fencing > < Painting +

Job Tasks (0) New

NAME	DESCRIPTION	TOTAL
------	-------------	-------

Job Materials (0) New

DESCRIPTI...	QUANTITY	TOTAL
--------------	----------	-------

Painting

Summary
Painting Include

Description

Salesforce Sans 12 B I U
Paint fence in Dulux "Flooded Gum" grey.

Work Order Description

Salesforce Sans 12 B I U

Painting Summary

Amount	Est. Margin	Hours
\$0.00	0%	0

Cost	Profit	Total
\$0.00	\$0.00	\$0.00

Labour Summary

Calculated

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Estimated Labour Override
Enter a value

Material Summary

Calculated

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Estimated Material Override
Enter a value



Having added a new line item, you may wish to see

- » How to clone a line item
- » "Detailed quote: Add job tasks and work estimates" on page cxxxviii
- » "Detailed quote: Add materials and material estimates" on page cxliii
- » "Quick quote: Adjust labour and material summaries" on the facing page
- » "How to exclude a line item" on page cliv
- » "How to use a job template" on page cliv

Quick quote: Adjust labour and material summaries



You can use the Labour Summary and Material Summary fields for two different purposes:

1. For simple quotes, you can enter the Labour Summary and / or Material Summary to rapidly specify the sale price of the quote line.
2. For more complex quotes, where you have built a list of Job Tasks and / or Job Materials, you can use the Labour Summary and / or Material Summary to refine the price, e.g. from \$136.66 to \$140.00.

The following procedure describes the second of these options. For a quick quote, simply enter the price of the Labour and Material Summary to specify the price of the quote line.

Once you have built your best estimate of the labour and material inputs in delivering this service, you can review the **Labour Summary**, **Materials Summary** and overall **Summary** for the job plan.

To adjust the Labour Summary or Material Summary estimates

1. From the **Labour Summary** or **Material Summary**, note the total Amount.

The screenshot displays a software interface for job planning and estimation. The main window is titled 'Business Manage...' and shows a job plan for 'Tiling' (JN-00145). The interface includes a navigation menu, a search bar, and a main content area with several summary cards.

Job Summary:

Customer Name	Est Labour Price	Est Material Price	Amount Inc Tax	Est Hours	Est Gross Margin
Danielle Anderson	\$800.00	\$336.00	\$1,249.60	8.00	43.75%

Job Tasks (3):

NAME	DESCRIPTION	TOTAL
Doing the J...	Remove broke...	\$200.00
Doing the J...	Retile	\$400.00
Set up - Pac...	Scaffolding ass...	\$200.00

Job Materials (1):

DESCRIPTI...	QUANTITY	TOTAL
High quality...	3.0	\$336.00

Tiling Summary:

Amount	Est Margin	Hours
\$1,136.00	33.98%	8

Labour Summary:

Calculated	Cost	Amount	Profit
	\$450.00	\$800.00	\$350.00

Material Summary:

Calculated	Cost	Amount	Profit
	\$300.00	\$336.00	\$36.00

- Enter your preferred value. Check `Include GST` if this price includes GST (or leave it unchecked if this price is ex. GST).

The screenshot shows the 'Business Management' interface for job JN-00145. At the top, there are navigation tabs: Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and More. Below this, a header bar displays job details: Customer Name (Danielle Anderson), Est Labour Price (\$800.00), Est Material Price (\$390.00), Amount Inc Tax (\$1,309.00), Est Hours (8.00), and Est Gross Margin (43.75%).

The main content area is divided into several sections:

- Job Tasks (3):** A table with columns NAME, DESCRIPTION, and TOTAL. It lists three tasks: 'Doing the J... Remove broke...' (\$200.00), 'Doing the J... Retile' (\$400.00), and 'Set up - Pac... Scaffolding ass...' (\$200.00).
- Job Materials (1):** A table with columns DESCRIPTION, QUANTITY, and TOTAL. It lists one material: 'High quality...' with a quantity of 3.0 and a total of \$536.00.
- Tiling Summary:** A summary table with columns Amount, Est Margin, and Hours. It shows an amount of \$1,190.00, an estimated margin of 36.97%, and 8 hours.
- Labour Summary:** A section with a 'Calculated' table showing Cost (\$450.00), Amount (\$800.00), and Profit (\$350.00). It also has an 'Estimated Labour Override' field with a placeholder 'Enter a value'.
- Material Summary:** A section with a 'Calculated' table showing Cost (\$300.00), Amount (\$336.00), and Profit (\$36.00). It also has an 'Estimated Material Override' field containing the value '\$390.00', which is highlighted by a green arrow.



The value you entered into the **Labour Summary** or **Material Summary** Override field becomes the value of the header's Estimated Labour Price OR Estimated Material Price.



No matter what you initially estimate, you can override your detailed estimates with a preferred value, OR
You can use these fields to dispense with detailed quoting and simply enter the price you want to charge to customers.

Detailed quote: Add job tasks and work estimates



When you are constructing a detailed quote, you may find it useful to list all the labor components of the job. This can assist you in understanding each of the various costs and the estimated number of hours involved in fulfilling the quote.

To help compile these costs, you can enter a list of **Job Tasks**. Each Job Task can be viewed by buy price and sell price. You can manipulate your desired markup above cost.

Use **Job Tasks** to list each step needed to deliver the service.



None of the details entered into the **Job Tasks** will be seen by the customer. Job Tasks helps you plan the work and estimate prices only. Any pricing information you add to the Job Tasks or

To create new a Job Task

1. From the Job Tasks section, press New.

The screenshot shows the 'Business Management' interface for job JN-00145. At the top, there is a navigation bar with 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', and 'More'. Below this, a summary bar displays job details: Customer Name (Danielle Anderson), Est Labour Price (\$650.00), Est Material Price (\$0.00), Amount Inc Tax (\$715.00), Est Hours (6.50), and Est Gross Margin (0%).

The main area is titled 'New Item' and contains several sections:

- Job Tasks (3):** A table with columns 'NAME', 'DESCRIPTION', and 'TOTAL'. It lists three items: 'Doing the J... Remove broke...' (\$200.00), 'Doing the J... Retile' (\$400.00), and 'Travel Travel to and fr...' (\$50.00). A 'New' button is next to the table.
- Job Materials (0):** A table with columns 'DESCRIPTI...', 'QUANTITY', and 'TOTAL'. It is currently empty, with a 'New' button.
- Task Configuration:** Fields for 'Task Type' (set to 'Travel'), 'Task Description' ('Travel to and from site'), 'Estimated Hours' (5), 'Estimated Hourly Cost' (\$55.00), 'Hourly Rate' (\$100.00), and 'Total' (\$50.00).
- Summary:** A table showing 'Amount' (\$650.00), 'Est Margin' (41.92%), and 'Hours' (6.5). Below it, 'Cost' (\$377.50), 'Profit' (\$272.50), and 'Total' (\$715.00) are displayed.
- Labour Summary:** A section with 'Calculated' values: Cost (\$377.50), Amount (\$650.00), and Profit (\$272.50). It also includes an 'Estimated Labour Override' field.
- Material Summary:** A section with 'Calculated' values: Cost (\$0.00), Amount (\$0.00), and Profit (\$0.00). It also includes an 'Estimated Material Override' field.

A green arrow points to the 'New' button in the 'Job Tasks (3)' section.

A new Job Task line item displays.

This screenshot shows the same 'Business Management' interface as above, but with a new job task line item added. The 'Job Tasks (4)' table now includes a fourth row: '-None-' with a total of \$0.00. The 'Task Configuration' section now shows 'Task Type' as '--None--' and 'Estimated Hours' as 0.0. The 'Summary', 'Labour Summary', and 'Material Summary' sections remain the same as in the previous screenshot.

2. Select the Task Type.
3. Enter the Task Description.
4. Enter the Estimated Hours and Estimated Hourly Cost.
5. Adjust the Hourly Rate if needed.

Business Management... Home Chatter Accounts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Contacts More

JN-00145 Save Save and Back Invoice Job Cancel

Customer Name: Danielle Anderson Est Labour Price: \$850.00 Est Material Price: \$0.00 Amount Inc Tax: \$935.00 Est Hours: 8.5 Est Gross Margin: 0%

New Item +

Job Tasks (4) New

NAME	DESCRIPTION	TOTAL
Doing the J...	Remove broke...	\$200.00
Doing the J...	Retail	\$400.00
Travel	Travel to and fr...	\$50.00
Set up - Pac...	Scaffolding ass...	\$200.00

Job Materials (0) New

DESCRIPTI...	QUANTITY	TOTAL
--------------	----------	-------

- Set up - Pack Up

Task Type: Set up - Pack Up Task Description: Scaffolding assembly and disassembly

Estimated Hours: 2 Estimated Hourly Cost: \$50.00 Hourly Rate: \$100.00 Total: \$200.00

Summary

Amount	Est Margin	Hours
\$850.00	43.82%	8.5
Cost	Profit	Total
\$477.50	\$372.50	\$935.00

Labour Summary

Calculated

Cost	Amount	Profit
\$477.50	\$850.00	\$372.50

Estimated Labour Override: Enter a value

Material Summary

Calculated

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Estimated Material Override: Enter a value



If the default value of Hourly Rate is not current, you can change the default within the Franchise Profile Account. See “How to set defaults for quotes and invoices ” on page xlvi.



Customers do not see any task or material information on quotes or invoices. Only the value of the line item is shown, which is the sum of all Job Tasks, Job Materials and GST.

To change a Job Task

1. Click any of the Job Task lines.

The screenshot shows the Business Management software interface for job JN-00145. The interface includes a navigation menu at the top with options like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and More. Below the navigation, there are buttons for Save, Save and Back, Invoice Job, and Cancel. The main content area displays job details and a table of Job Tasks.

Customer Name: Danielle Anderson
Est Labour Price: \$850.00
Est Material Price: \$0.00
Amount Inc Tax: \$935.00
Est Hours: 8.50
Est Gross Margin: 0%

Job Tasks (4)

NAME	DESCRIPTION	TOTAL
Doing the J...	Remove...	\$200.00
Doing the J...	Retile	\$400.00
Travel	Travel to and fr...	\$50.00
Set up - Pac...	Scaffolding ass...	\$200.00

- Set up - Pack Up

Task Type: Set up - Pack Up
Task Description: Scaffolding assembly and disassembly

Estimated Hours	Estimated Hourly Cost	Hourly Rate	Total
2	\$50.00	\$100.00	\$200.00

Summary

Amount	Est Margin	Hours
\$850.00	43.82%	8.5

Cost	Profit	Total
\$477.50	\$372.50	\$935.00

Labour Summary

Calculated

Cost	Amount	Profit
\$477.50	\$850.00	\$372.50

Estimated Labour Override: Enter a value

Material Summary

Calculated

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Estimated Material Override: Enter a value

2. Change a field value.
3. Click on any other Job Task line or press the **Save** button. The change will be saved.

To remove a Job Task line

1. Press the relevant line's **Delete** button.

The screenshot displays a software interface for job management. At the top, there is a navigation bar with 'Business Manage...' and various menu items like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and More. Below this, a job header for 'JN-00145' is shown with a 'Save' button and options for 'Save and Back', 'Invoice Job', and 'Cancel'. A summary row provides key metrics: Customer Name (Danielle Anderson), Est Labour Price (\$850.00), Est Material Price (\$0.00), Amount Inc Tax (\$935.00), Est Hours (8.50), and Est Gross Margin (0%).

The main area is divided into several sections. On the left, there is a 'New Item' section with a '+' icon. Below it, a 'Job Tasks (4)' table is visible, with a green arrow pointing to the 'Set up - Pack Up' task. The table has columns for NAME, DESCRIPTION, and TOTAL. The 'Set up - Pack Up' task has a total of \$200.00. To the right of the table, a detailed view for the 'Set up - Pack Up' task is shown, including a 'Task Type' dropdown set to 'Set up - Pack Up', a 'Task Description' of 'Scaffolding assembly and disassembly', and a table with columns for Estimated Hourly Cost (\$50.00), Hourly Rate (\$100.00), and Total (\$200.00).

On the right side, there are three summary panels. The 'Summary' panel shows Amount (\$850.00), Est Margin (43.82%), and Hours (8.5). The 'Labour Summary' panel shows Calculated Cost (\$477.50), Amount (\$850.00), and Profit (\$372.50). The 'Material Summary' panel shows Calculated Cost (\$0.00), Amount (\$0.00), and Profit (\$0.00). Each summary panel also includes an 'Estimated Labour Override' or 'Estimated Material Override' section with an 'Enter a value' input field and a checkbox.

2. The **Delete Job Task** dialog box appears. Press **Delete**.

Detailed quote: Add materials and material estimates



When you are constructing a detailed quote, you may find it useful to list all the material components of the job. This can assist you in understanding each of the various costs involved in the quote.

To help compile these costs, you can enter a list of **Job Materials**. Each Job Task and Job Material can be viewed by buy price and sell price. You can manipulate your desired markup above cost, or simply specify your sell price.

Job Materials allows you to list all the materials required to complete the job. You can add materials either manually, or populate them automatically from a price list. See “Working with Material Price Lists” on page cdxvi.

To add a material from a price list to a job line

1. From the Job Materials list, press **New**.

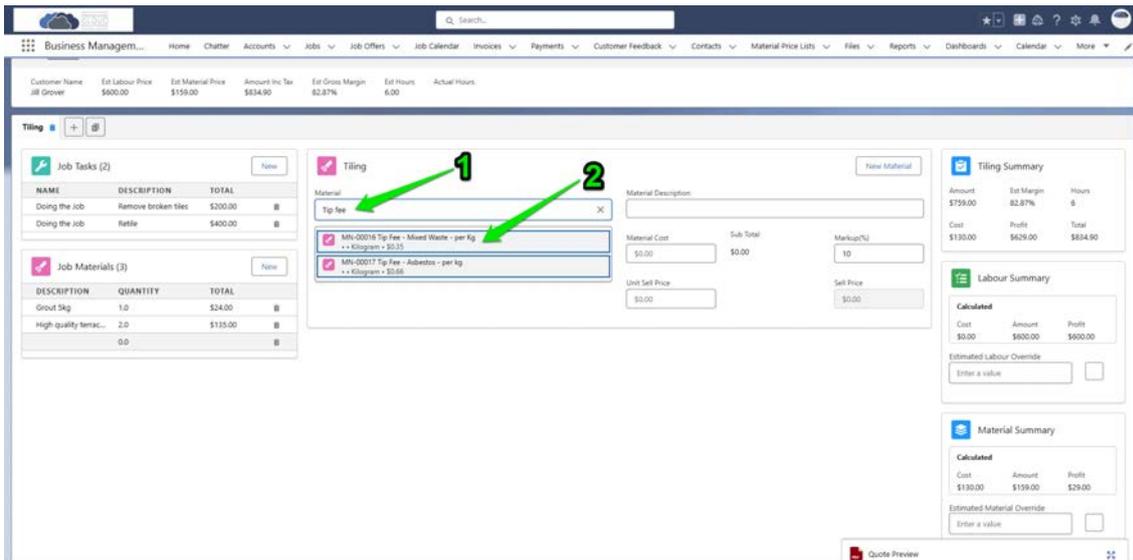
The screenshot displays the 'Business Management' software interface for job 'JN 00425'. The main area is titled 'Tiling - High quality terracotta tiles - black'. On the left, there are two tables: 'Job Tasks (2)' and 'Job Materials (2)'. The 'Job Materials (2)' table has a 'New' button next to it, which is highlighted by a green arrow. The 'Job Materials (2)' table contains the following data:

DESCRIPTION	QUANTITY	TOTAL
Grout Pkg	1.0	\$24.00
High quality terrac...	2.0	\$135.00

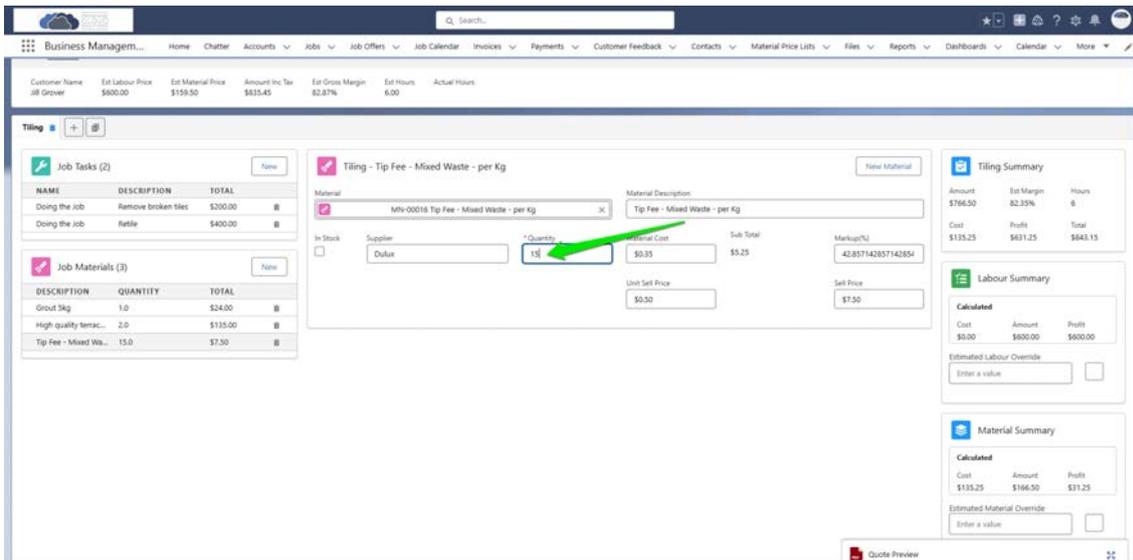
The 'Job Materials (2)' table also has a 'New' button next to it, which is highlighted by a green arrow.

The main area shows the details for the material 'High quality terracotta tiles - black'. It includes a search bar, a quantity of 2, a material cost of \$55.00, a sub-total of \$110.00, a unit sell price of \$67.50, and a sell price of \$135.00. There are also summary sections for 'Tiling Summary', 'Labour Summary', and 'Material Summary' on the right side of the interface.

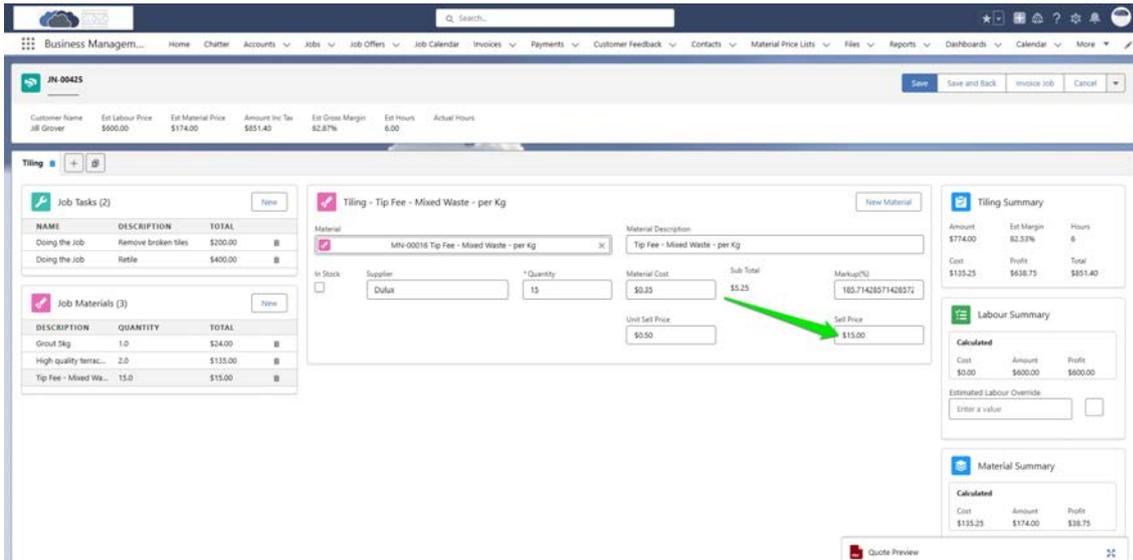
- From the **Job Material** line, enter a search term into the **Material** field. The system will search for the term within Material Price Lists. Select your intended material from the search results.



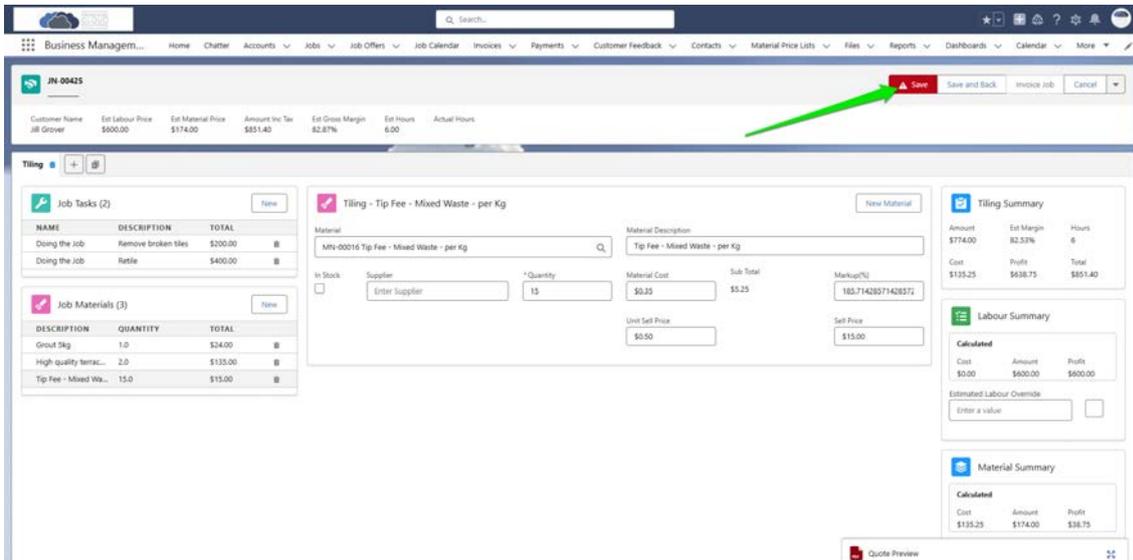
- Having selected the material, enter the **Quantity**.



4. Now you can choose to enter either the Unit Sell Price, Sell Price, or the Markup %



5. Remember to **Save** when you're finished.



If a product is not yet on a price list, you can add it to any price list you own, See "How to add a new material to a price list" on page cxlviii. You could also simply enter the material manually.

To manually add a material to a job line

1. From the Job Materials list, press New.

The screenshot shows the 'Job Materials' section of a software interface. A green arrow points to the 'New' button next to the 'Job Materials (3)' header. The interface includes a top navigation bar, a search bar, and a main content area with several panels: 'Job Tasks (2)', 'Job Materials (3)', 'Tiling', 'Tiling Summary', 'Labour Summary', and 'Material Summary'. The 'Job Materials (3)' table is as follows:

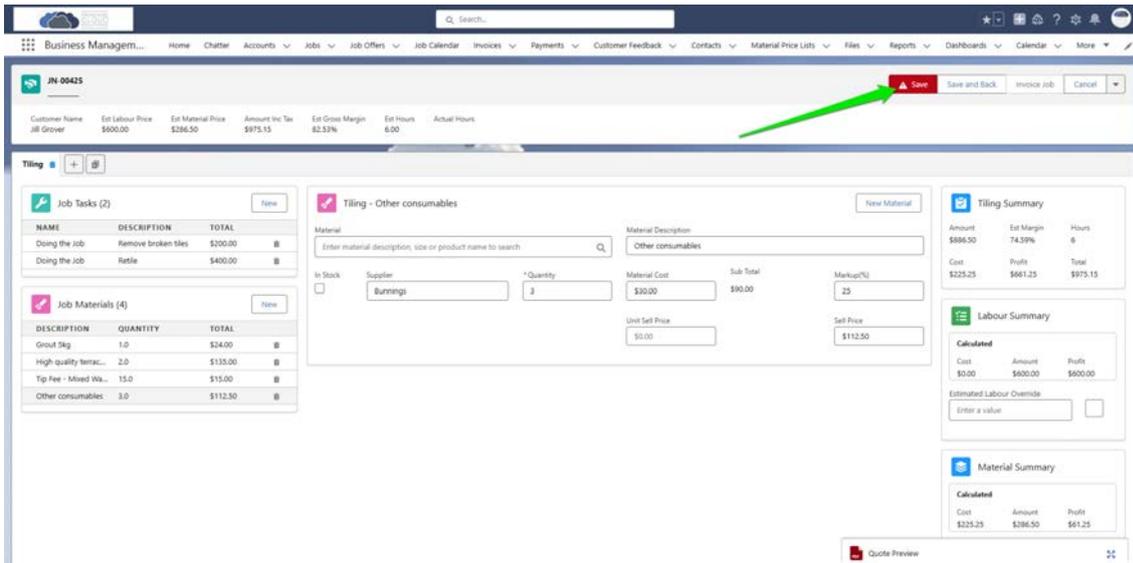
DESCRIPTION	QUANTITY	TOTAL
Grout Dkg	1.0	\$24.00
High quality terrac...	2.0	\$135.00
Tip Fee - Mixed Wa...	15.0	\$15.00

2. Click on the new Job Material line, then proceed to complete each of the detail fields.

The screenshot shows the 'Tiling - Other consumables' form. A green box highlights the input fields for 'Material Description', 'Quantity', 'Material Cost', 'Sub Total', 'Markup(%)', 'Unit Sell Price', and 'Sell Price'. The form includes a search bar for material descriptions and a table for material details. The 'Job Materials (4)' table is as follows:

DESCRIPTION	QUANTITY	TOTAL
Grout Dkg	1.0	\$24.00
High quality terrac...	2.0	\$135.00
Tip Fee - Mixed Wa...	15.0	\$15.00
Other consumables	3.0	\$112.50

3. Remember to **Save** when you're finished.



If the material you are searching for is not yet on a Material Price List, you can add the new material to a price list that you own. See “How to add a new material to a price list” on the facing page.

How to add a new material to a price list

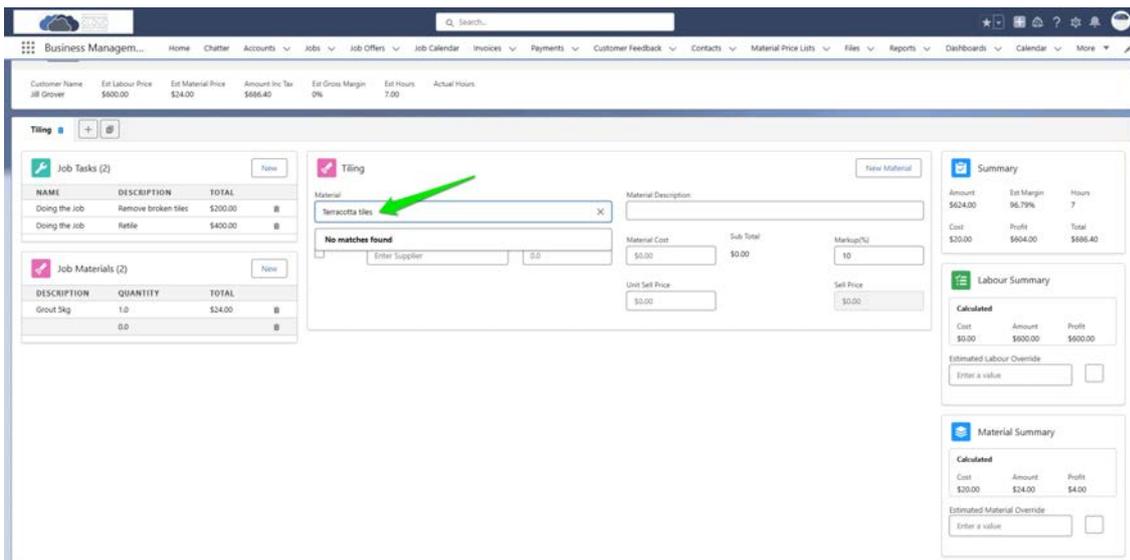
When you need to add a material that is not already on a Material Price List, from the Job Planning page you are able to add it to any Material Price List that you own.



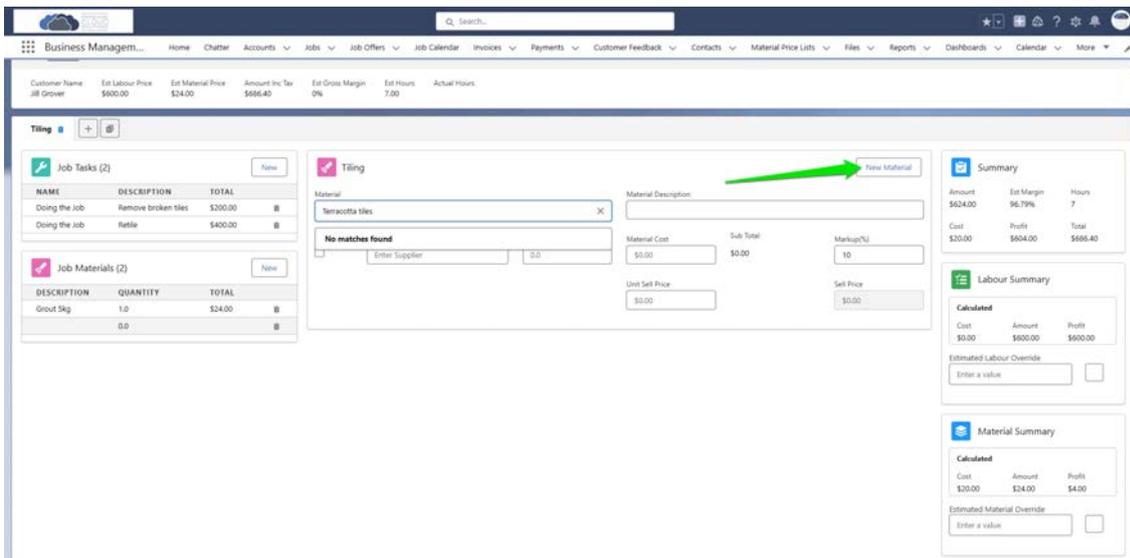
When you add a material, you need to add it to an existing Material Price List that you own. You may need to create your own Material Price List prior to adding a new material. See “Creating a material price list” on page cdxviii.

To add a new material to a price list

1. From the material line, search for the material.



2. When the material is not found, press New Material.



The New Material dialog box appears.

- Complete the details in the New Material dialog box, then press **Save**.

New Material

* Product Name
Terracotta Tiles - Black

* Price \$55.00 * Sell Price \$67.50

* Material Price List Bunnings * Currency AUD

Size 1 Supplier Bunnings

Quantity Unit Of Measure Metre Supplier Part Number 56787

Description High quality terracotta tiles - black.

Cancel Save

The new material is added to the list and selected within the job plan.

- Complete the remainder of the details in order to complete the line.

The screenshot shows the Business Management software interface for a job plan titled 'Tiling'. The main area displays a table for 'Job Materials (2)' with the following data:

DESCRIPTION	QUANTITY	TOTAL
Grout 5kg	1.0	\$24.00
High quality terrac...	2.0	\$135.00

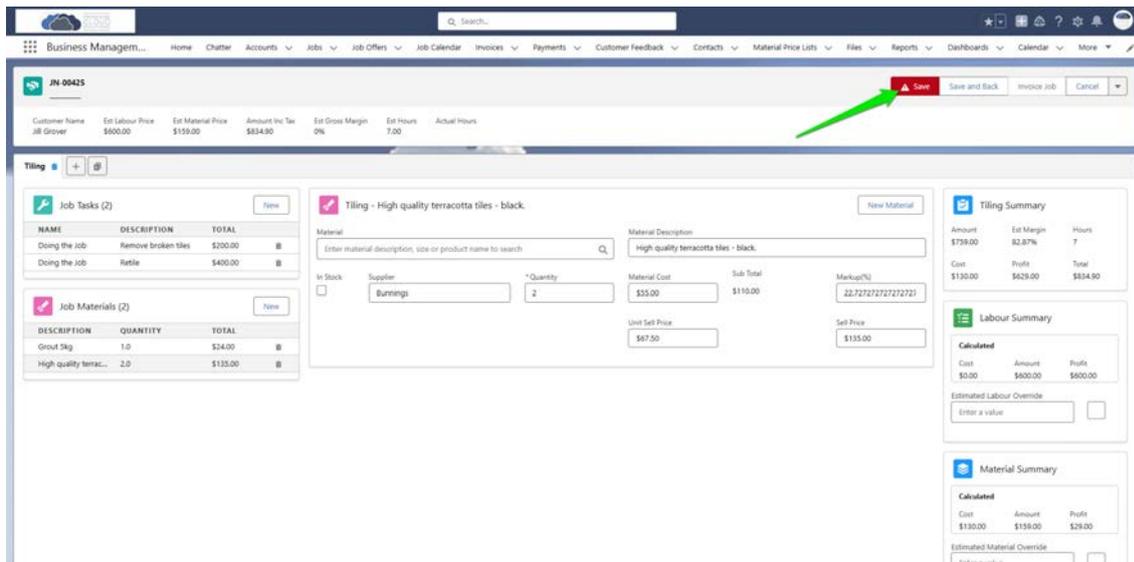
The 'Tiling - High quality terracotta tiles - black.' line is selected, showing details for the material:

- Material Description: High quality terracotta tiles - black.
- Supplier: Bunnings
- Quantity: 2
- Material Cost: \$55.00
- Sub Total: \$110.00
- Unit Sell Price: \$67.50
- Sell Price: \$135.00

Summary panels on the right include:

- Tiling Summary:** Amount \$759.00, Est Margin 82.87%, Hours 7, Cost \$130.00, Profit \$629.00, Total \$659.00.
- Labour Summary:** Calculated Cost \$0.00, Amount \$600.00, Profit \$600.00.
- Material Summary:** Calculated Cost \$130.00, Amount \$155.00, Profit \$29.00.

5. Remember to **Save** when you're finished.



How to add an image to a line item

To use photos within your quotes or invoices, you can add them to specific line items within the Job Plan.

To add a photo to a line item

1. Place your cursor in the Description field at the place you want the image to appear.

The screenshot shows the 'Fencing' job task description field in the Business Management software. The description is 'Fence three sides of house lot.' The text editor toolbar includes an image button (a small square with a picture icon). A red box highlights this button, indicating where to click to add a photo. The interface also shows summary tables for Fencing, Labour, and Material.

NAME	DESCRIPTION	TOTAL
Travel	Travel	\$50.00
Site Visit	Call out fee	\$80.00
Doing the J...	Erect fence	\$1,200.00

DESCRIPTI...	QUANTITY	TOTAL
Pickets	150.0	\$337.50
Fence posts	12.0	\$200.00

Amount	Est Margin	Hours
\$1,867.50	46.37%	13.3

Cost	Profit	Total
\$1,001.50	\$866.00	\$2,054.25

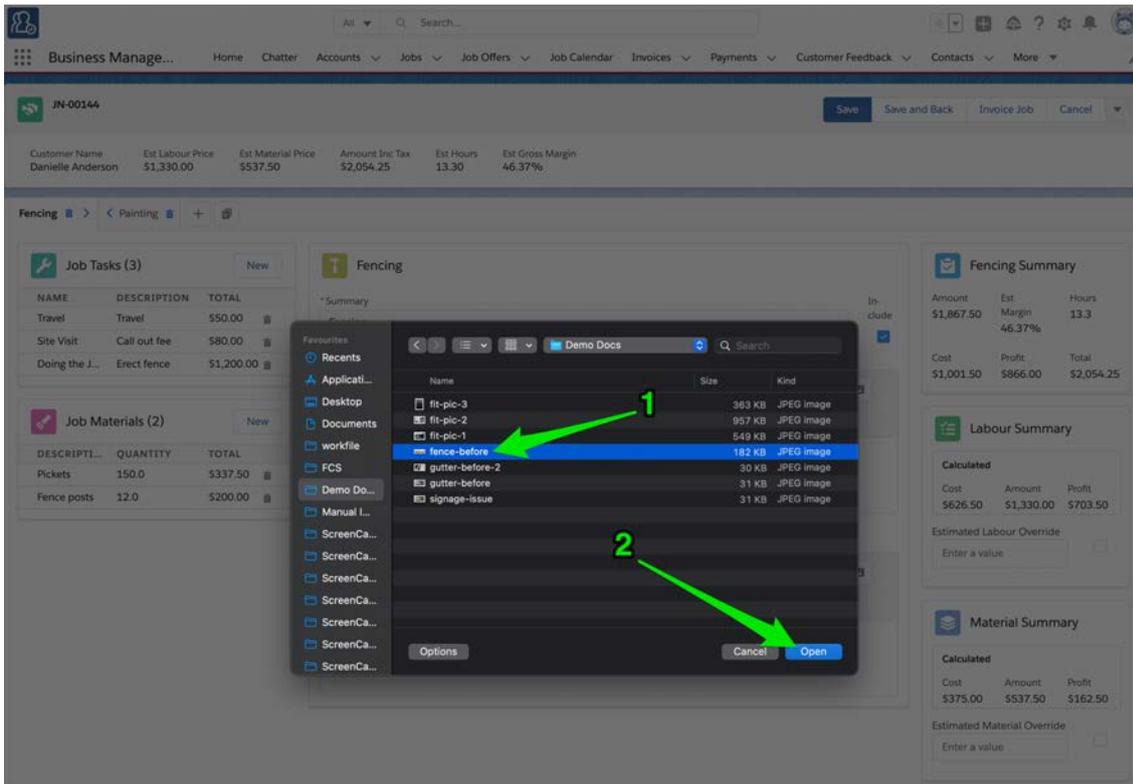
Cost	Amount	Profit
\$626.50	\$1,330.00	\$703.50

Cost	Amount	Profit
\$375.00	\$537.50	\$162.50

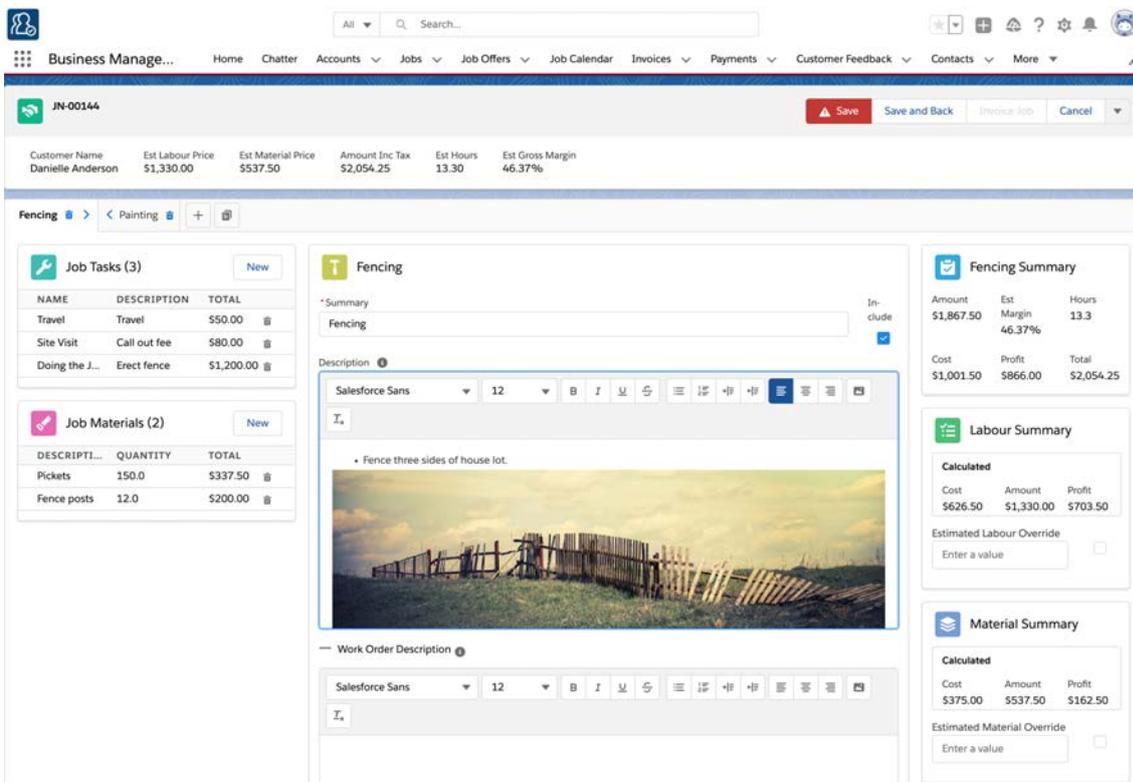
2. Press the image button.

This screenshot is identical to the one above, but with a green arrow pointing to the image button in the text editor toolbar, indicating the action to be taken.

3. Select the image from your computer.



4. The image is now displayed in the Description field. Remember to press Save or Save and Back.





When you next generate a quote, you will see the image included in the line item description. See “How to send a quote” on page clvii.

How to exclude a line item

You can include or exclude individual quote lines on a Job Plan.



This is useful to allow:

- » A customer to proceed with only part of a quote, or
- » For you to produce multiple options from which a customer can select their preferred quote.

Quote lines are included by default.

To exclude a line from the quotation

1. From the appropriate line item tab, uncheck **Include**.

The screenshot shows the Business Manager software interface. At the top, there is a navigation menu with options like Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, Customer Feedback, Contacts, Material Price Lists, Files, Reports, Dashboards, and More. Below the navigation, there is a header section with job details: Job Number JN00125, Job Name Doogun, Fencing, Customer Name Geraldine Doogue, Estimated Labour Price \$1,756.82, Estimated Material Price \$718.95, and Amount Inc GST \$2,723.34. The main content area is divided into several sections: 'Job Tasks (5)' with a table of tasks and their totals, 'Job Materials (3)' with a table of materials and their totals, 'Cubby House' with a text editor and an 'Include' checkbox (highlighted by a green arrow), and three summary tables: 'Cubby House Summary', 'Labour Summary', and 'Material Summary'. Each summary table shows calculated costs, amounts, and profits.

The quote line is now excluded from any quote or invoice that you generate.

How to use a job template

It is not always necessary to develop a job plan from scratch. There may be times when you want to reuse previous job plans.



You may want to reuse previous job plans when

- » you have a standard product or service offering that you offer to multiple customers
- » you want to create identical quotes, such as when you are erecting a fence and the neighboring property owners have agreed to split the bill



If you have a regularly repeating job with a specific customer, you may prefer to clone the job instead. See “How to clone a job” on page clxxiv.

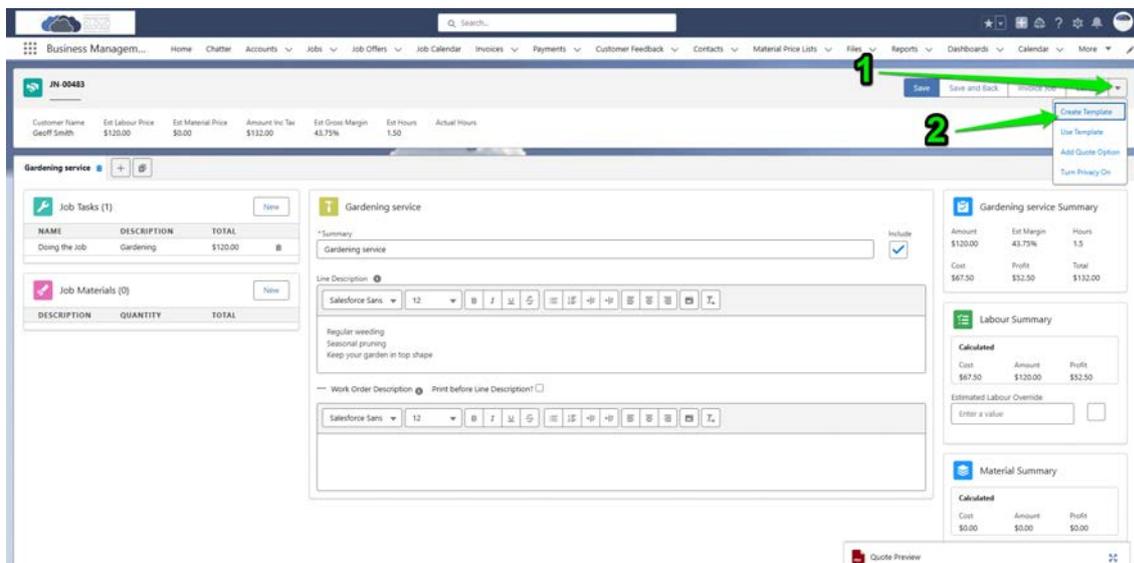
You reuse job plans by

- » marking an existing job as a template
- » cloning the template into a new job plan

To create a new job template

1. From the **Job Planning** page, enter all the standard information and **Save** your job.

When you are ready to create the template, press the **More**  button then **Create Template**.



The screenshot shows the 'Gardening service' job plan in the Business Management software. The top navigation bar includes 'Business Management', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', 'Material Price Lists', 'Files', 'Reports', 'Dashboards', 'Calendar', and 'More'. The job details for 'Gardening service' (JN 00483) are displayed, including customer name 'Geoff Smith', estimated labour price of \$120.00, estimated material price of \$5.00, and an estimated gross margin of 43.75%. The 'More' dropdown menu is open, showing options: 'Create Template', 'Use Template', 'Add Quote Option', and 'Turn Privacy On'. A 'Quote Preview' button is visible at the bottom right.

2. Name and describe the template, then press **Continue**.

Create Template

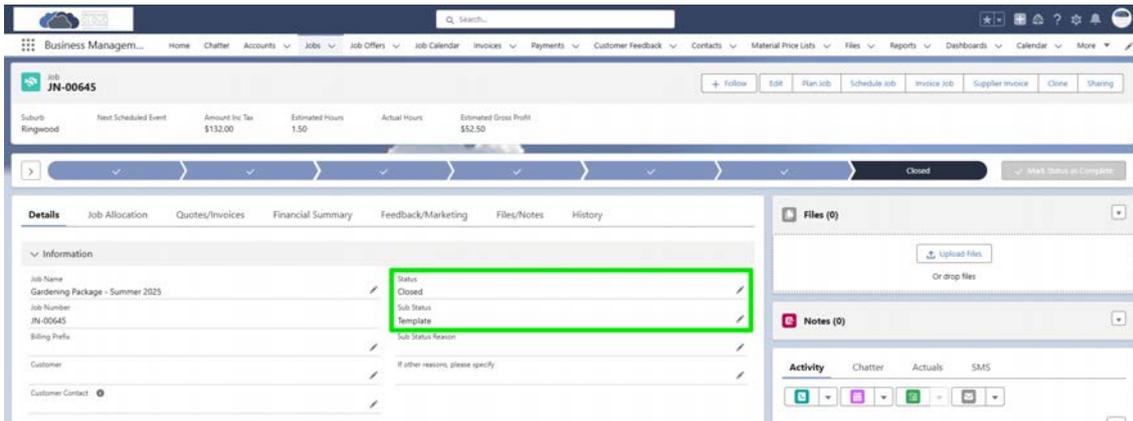
 Create Template

Template Name

Template Description

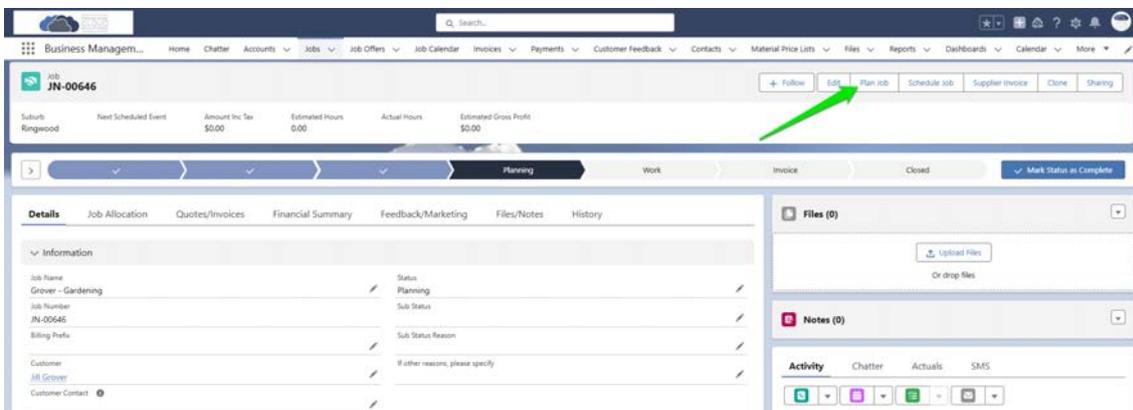
On pressing **Continue**, the system creates the job plan within a new Job whose Status is *Closed* and Sub Status is *Template*.

3. The system redirects to the newly created Job that houses the template.

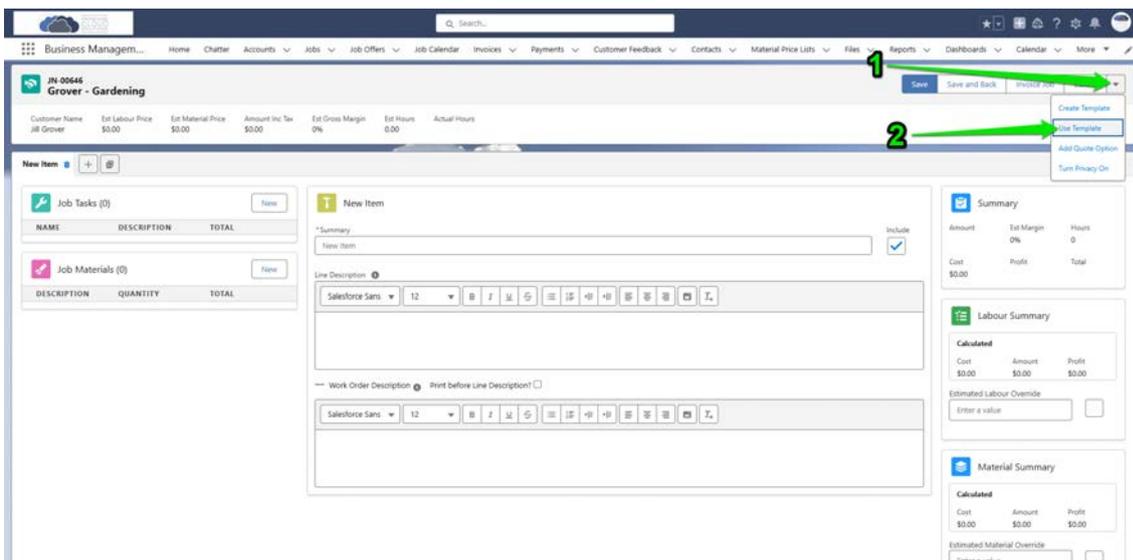


To use a job template

1. From a new job, place the job into the Planning status, then press Plan Job.



2. From the new job plan, press the More button then Use Template.



3. Search for the template by name or number, then select the template from the search results.

Use Template

Use Template

*Template Name

Gardening

Gardening Package - Summer 2025 - JN-00645
17/03/2025 3:31 PM • \$132

Cancel Update Job Using Template

4. When the template is selected, press Update Job Using Template.

Use Template

Use Template

*Template Name

Gardening Package - Summer 2025 - JN-00645

Cancel Update Job Using Template

5. The templated job plan is now applied to your new job.

Business Management... Home Chatter accounts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Contacts Material Price Lists Files Reports Dashboards Calendar More

JN-00646 Grover - Gardening Update from Template Successful Save Save and Back Invoice Job Cancel

Customer Name	Est Labour Price	Est Material Price	Amount Inc Tax	Est Gross Margin	Est Hours	Actual Hours
Jill Grover	\$120.00	\$0.00	\$132.00	43.75%	1.50	

Gardening service

Job Tasks (1)

NAME	DESCRIPTION	TOTAL
Doing the Job	Gardening	\$120.00

Job Materials (0)

DESCRIPTION	QUANTITY	TOTAL
-------------	----------	-------

Gardening service

*Summary

Gardening service

Line Description

Salesforce Sans 12

Regular weeding
Seasonal pruning
Keep your garden in top shape

Work Order Description

Salesforce Sans 12

Gardening service Summary

Amount	Est Margin	Hours
\$120.00	43.75%	1.5

Cost Profit Total

\$67.50	\$52.50	\$132.00
---------	---------	----------

Labour Summary

Calculated

Cost	Amount	Profit
\$67.50	\$120.00	\$52.50

Estimated Labour Override

Material Summary

Calculated

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Quote Preview



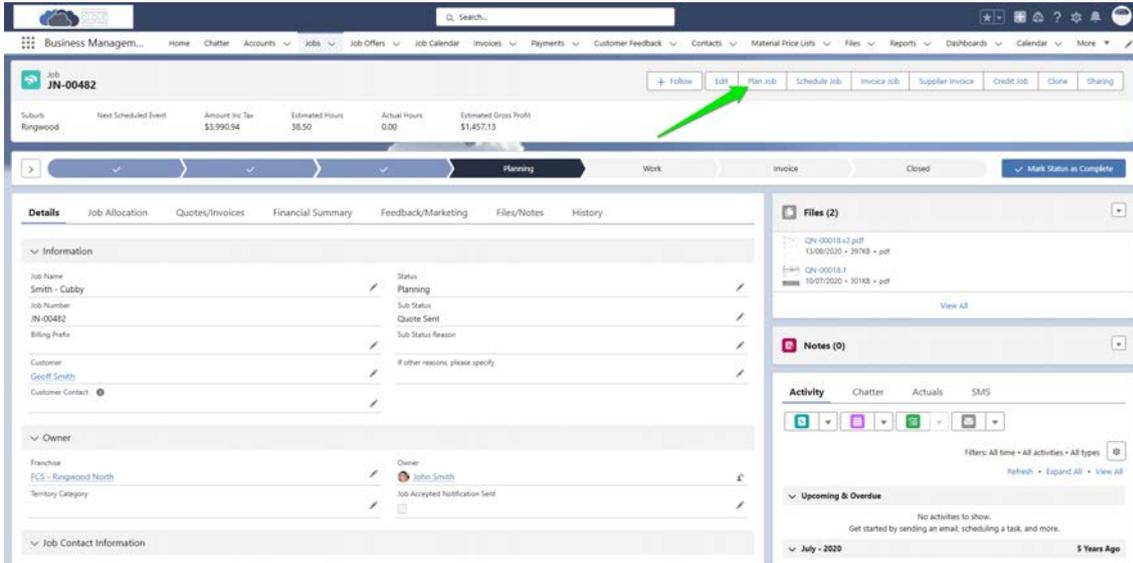
Having applied the template, you can now edit the job plan to suit.

How to send a quote

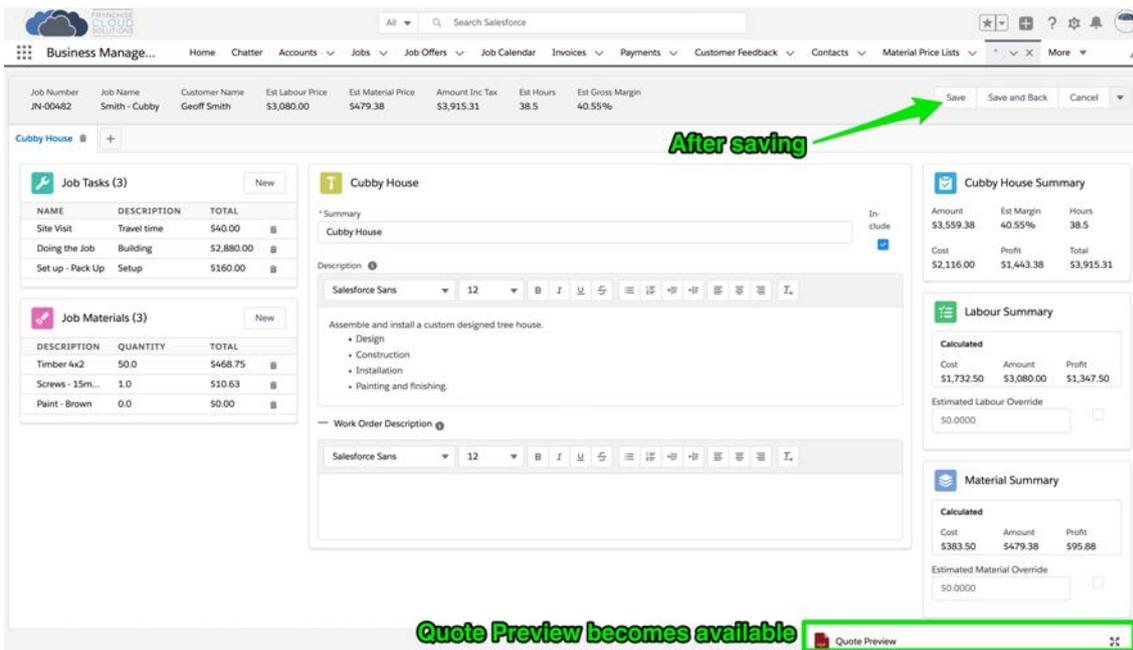
For installations using Nextdoc, you can send quotes from the Job Plan page.

How to email quotes using Nextdoc

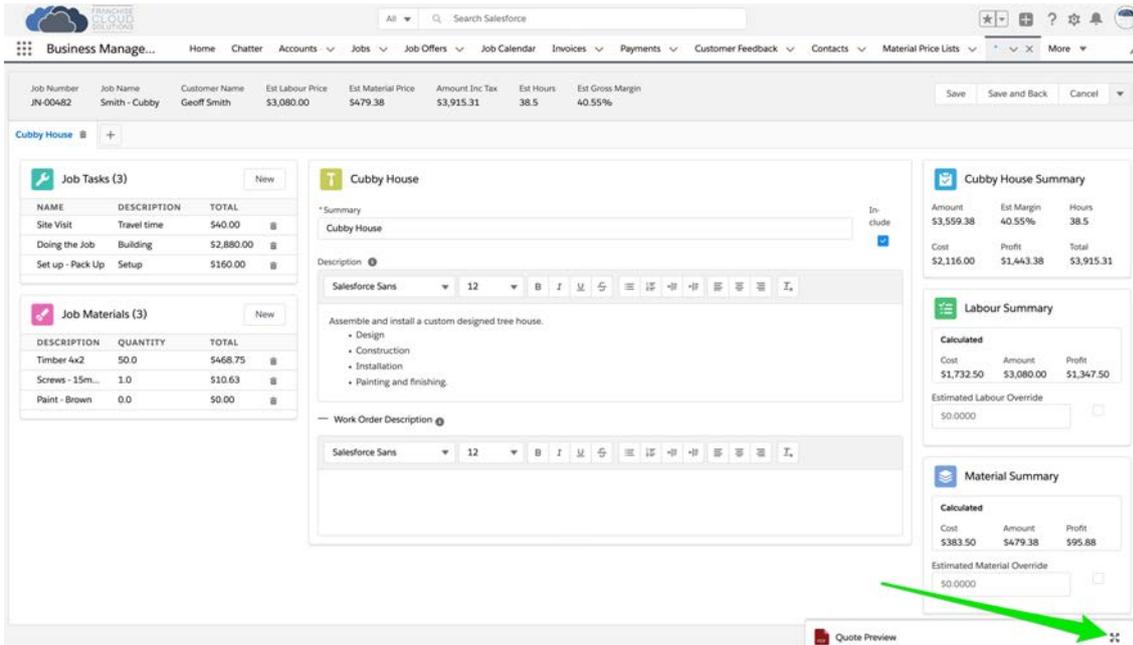
1. Generating a quote has been incorporated into the Plan Job page. To plan a job and generate a quote, select **Plan Job**.



2. The Plan Job page has a Quote Preview window. Quote Preview updates as soon as the Job Plan is saved, showing you exactly what the quote looks like.

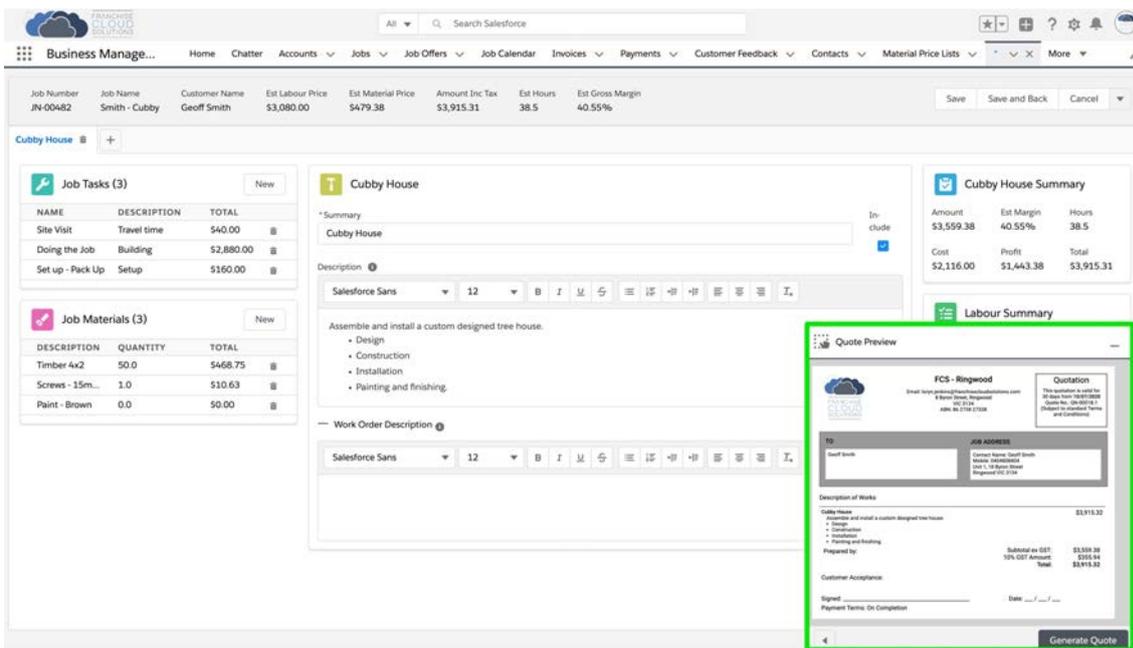


3. To see the quote, press the **Expand**  button.



The screenshot shows the 'Business Management' software interface. At the top, there's a navigation bar with 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', and 'Material Price Lists'. Below this, a summary bar displays job details: Job Number JN-00482, Job Name Smith - Cubby, Customer Name Geoff Smith, Est Labour Price \$3,080.00, Est Material Price \$479.38, Amount Inc Tax \$3,915.31, Est Hours 38.5, and Est Gross Margin 40.55%. The main content area is titled 'Cubby House' and contains several sections: 'Job Tasks (3)' with a table of tasks (Site Visit, Doing the Job, Set up - Pack Up), 'Job Materials (3)' with a table of materials (Timber 4x2, Screws - 15m..., Paint - Brown), a 'Cubby House' description field, and three summary cards: 'Cubby House Summary', 'Labour Summary', and 'Material Summary'. A green arrow points to a 'Quote Preview' button at the bottom right of the interface.

4. Now you can see the dynamically-generated quote preview.



This screenshot is similar to the previous one, but with a 'Quote Preview' window open in the bottom right corner. The window displays a professional quote document for 'FCS - Ringwood'. It includes the company logo and contact information, a 'Quotation' header, and a 'JOB ADDRESS' section for Geoff Smith. The 'Description of Works' section lists tasks like 'Assemble and install a custom designed tree house' with a total value of \$3,915.32. A 'Customer Acceptance' section is also present with fields for 'Signed' and 'Date'. A 'Generate Quote' button is located at the bottom right of the preview window.

5. Every time you **Save** the job plan, the **Quote Preview** is updated.

6. Complete the Job Plan as per normal.

7. When you are ready to generate the quote, press **Generate Quote**.

The screenshot shows the Business Manager interface for a job named 'Cubby House'. The main window displays job tasks, materials, and a summary table. A 'Quote Preview' dialog box is open, showing a preview of the quote document. A green arrow points to the 'Generate Quote' button at the bottom right of the dialog.

Job Number	Job Name	Customer Name	Est Labour Price	Est Material Price	Amount Inc Tax	Est Hours	Est Gross Margin
JN-00482	Smith - Cubby	Geoff Smith	\$3,080.00	\$479.38	\$3,915.31	38.5	40.55%

NAME	DESCRIPTION	TOTAL
Site Visit	Travel time	\$40.00
Doing the Job	Building	\$2,880.00
Set up - Pack Up	Setup	\$160.00

DESCRIPTION	QUANTITY	TOTAL
Timber 4x2	50.0	\$468.75
Screws - 15m...	1.0	\$10.63
Paint - Brown	0.0	\$0.00

Amount	Est Margin	Hours
\$3,559.38	40.55%	38.5
Cost	Profit	Total
\$2,116.00	\$1,443.38	\$3,915.31

8. The **Compose Email** dialog appears. This dialog will allow you to

The 'Compose Email' dialog box is shown with the following sections:

- Send to:** One or more contacts. Selected contact: Geoff Smith (lorynj+gsmith@gmail.com).
- Enter CC addresses:** Separate multiple addresses with a comma.
- My inbox (bcc):**
- Template:** Select a template: Quote Attached Template. Set As Default Template:
- Content:** Using the selected template for email content. Edit Content button.
- Selected Attachments:** QN-00018.1 (PDF icon).
- Add Attachments:** Upload Additional Files. Upload Files button. Or drop files. Add Attachments From Record.

Buttons at the bottom: Cancel, Cancel and Remove Attachments, Send.

- » Add one or more contacts from the Job (or Business)
- » Enter additional free-form CC addresses
- » BCC to your inbox
- » Select an email template
- » Optionally modify the email content
- » Select any existing attachments to the Job
- » Optionally upload new attachments
- » Send an email with the quote and any other selected files or images attached to the email separately



The `My inbox (bcc)` box is sticky. Whatever you set it to last time you sent a quote will be the default setting the next time you open it.

If you find yourself regularly choosing a single quote template, you can set that template to the default by checking the `Set as Default Template` box, then pressing **Send**.

How to create a quote with options

Sometimes we want to provide the customer a quotation containing options. Perhaps the customer wants to decide between the tile or smokey glass splash-backs. Or, perhaps they're wanting to choose between just the mowing service, or an option to include gardening as well.



It's often a good idea to provide the customer with options, because it's sometimes easier to close a customer if they're choosing between options than choosing whether or not to purchase at all.



Let's say we have a **Job Plan** that contains lines for mowing and gardening. We want to shape a quote that provides:

- » An option for mowing services only; and
- » An option for mowing and gardening.

Here's our starting point:

The screenshot displays a software interface for job planning and estimation. The main heading is "Mowing and gardening" for job JN-00190. Customer information includes Daniel Coyle, with an estimated labour price of \$550.00, an estimated material price of \$0.00, an estimated amount including tax of \$605.00, an estimated 5.50 hours, and an estimated gross margin of 55%.

The interface is divided into several sections:

- Job Tasks (2):** A table listing tasks and their costs.

NAME	DESCRIPTION	TOTAL
Site Visit	Travel	\$50.00
Doing the Job	Mowing	\$150.00
- Job Materials (0):** A table for materials, currently empty.
- Mowing Task:** A detailed view of the "Mowing" task. It includes a description: "Mow front, side and rear lawns." and a photograph of a residential lawn.
- Summary Tables:**
 - Mowing Summary:**

Amount	Est. Margin	Hours
\$200.00	55.00%	2
 - Labour Summary:**

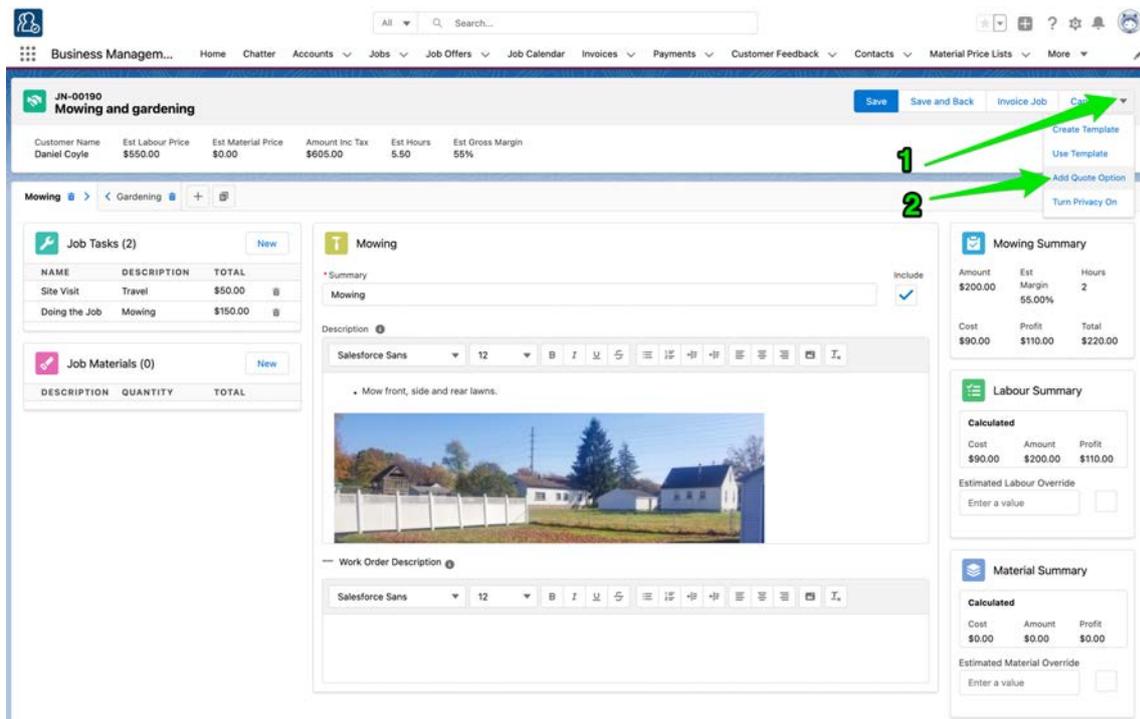
Cost	Amount	Profit
\$90.00	\$200.00	\$110.00
 - Material Summary:**

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Let's now shape it into a **Job Plan** with options.

To add an option to a job plan

1. Click down the **More**  button, then select **Add Quote Option**.



The screenshot shows the 'Mowing and gardening' job plan interface. The top navigation bar includes 'Business Management...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', 'Material Price Lists', and 'More'. The 'More' dropdown menu is open, showing options: 'Create Template', 'Use Template', 'Add Quote Option', and 'Turn Privacy On'. Red arrows labeled '1' and '2' point to the 'More' button and the 'Add Quote Option' menu item, respectively.

Customer Name	Est Labour Price	Est Material Price	Amount Inc Tax	Est Hours	Est Gross Margin
Daniel Coyle	\$550.00	\$0.00	\$605.00	5.50	55%

NAME	DESCRIPTION	TOTAL
Site Visit	Travel	\$50.00
Doing the Job	Mowing	\$150.00

Amount	Est Margin	Hours
\$200.00	55.00%	2

Cost	Profit	Total
\$90.00	\$110.00	\$220.00

Cost	Amount	Profit
\$90.00	\$200.00	\$110.00

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

2. The **Create Quote Option** dialog appears. Enter a **Name** and optional **Description**, then select or deselect which lines will appear within this option. Press **Save** when you're finished.

Create Quote Option

Name	Description
<input type="text" value="Mowing only"/>	<input type="text" value="Mow front and back lawns"/>
<input checked="" type="checkbox"/> 1: Mowing	
<input type="checkbox"/> 2: Gardening	



What you enter into **Name** and **Description** will appear on the quote.

- You've now added your first quote option. You've given it a name, a description and chosen which lines will appear within it.

Business Management... Home Chatter Accounts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Contacts Material Price Lists More

JN-00190
Mowing and gardening - Mowing only Save Save and Back Invoice Job Cancel

Customer Name	Est Labour Price	Est Material Price	Amount Inc Tax	Est Hours	Est Gross Margin
Daniel Coyle	\$200.00	\$0.00	\$220.00	2.00	55%

Show All **Mowing only** ← **Quote option**

Mowing ← **Lines appearing within the quote option**

Mowing only Option Edit Delete

Name: Mowing only Description: Mow front and back lawns

Apply Customer Selected Option

Mowing

* Summary: Mowing Include

Description: Mow front, side and rear lawns.

Work Order Description

Mowing Summary

Amount	Est Margin	Hours
\$200.00	55.00%	2
Cost: \$90.00	Profit: \$110.00	Total: \$220.00

Labour Summary

Calculated

Cost	Amount	Profit
\$90.00	\$200.00	\$110.00

Estimated Labour Override: Enter a value

Material Summary

Calculated

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Estimated Material Override: Enter a value



Now that you've added your first option, there are some things to note:

- » You can always see all lines within the **Job Plan** by selecting **Show All**

The screenshot shows the 'Mowing and gardening' job plan for customer Daniel Coyle. The job plan is currently set to 'Mowing only'. A green arrow points to the 'Show All' button. The job plan details include:

Customer Name	Est Labour Price	Est Material Price	Amount Inc Tax	Est Hours	Est Gross Margin
Daniel Coyle	\$550.00	\$0.00	\$605.00	8.50	55%

The job plan is divided into sections: Job Tasks (2), Job Materials (0), Mowing, and Mowing Summary. The Mowing section includes a description, a photo of a lawn, and a work order description. The Mowing Summary table shows:

Amount	Est Margin	Hours
\$200.00	55.00%	2

Additional summary tables for Labour and Material are also visible on the right side of the interface.

- » You can remove a line from an option (without deleting it from the Job Plan) by pressing the x button

The screenshot shows the 'Mowing and gardening - Mowing only' job plan for customer Daniel Coyle. The job plan is currently set to 'Mowing only'. A green arrow points to the 'x' button next to the 'Mowing' option. The job plan details include:

Customer Name	Est Labour Price	Est Material Price	Amount Inc Tax	Est Hours	Est Gross Margin
Daniel Coyle	\$200.00	\$0.00	\$200.00	2.00	55%

The job plan is divided into sections: Mowing only Option, Job Tasks (2), Job Materials (0), Mowing, and Mowing Summary. The Mowing section includes a description, a photo of a lawn, and a work order description. The Mowing Summary table shows:

Amount	Est Margin	Hours
\$200.00	55.00%	2

Additional summary tables for Labour and Material are also visible on the right side of the interface.



» You can edit the Name, Description or selected Lines within the option by pressing **Edit**

The screenshot shows the 'Mowing and gardening - Mowing only' job setup page. At the top, there are navigation tabs: Home, Charter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, Material Price Lists, and More. Below this, the job details are displayed: Customer Name (Daniel Coyle), Est Labour Price (\$200.00), Est Material Price (\$0.00), Amount Inc Tax (\$220.00), Est Hours (2.00), and Est Gross Margin (55%).

The main content area is divided into several sections:

- Mowing only Option:** A table with columns for Name and Description. The entry is 'Mowing only' with description 'Mow front and back lawns'. There are 'Edit' and 'Delete' buttons next to it. A green arrow points to the 'Edit' button.
- Job Tasks (2):** A table with columns for NAME, DESCRIPTION, and TOTAL. The entries are 'Site Visit' (Travel, \$50.00) and 'Doing the Job' (Mowing, \$150.00).
- Job Materials (0):** A table with columns for DESCRIPTION, QUANTITY, and TOTAL.
- Mowing:** A section with a 'Summary' field, a 'Description' field, and a 'Work Order Description' field. There is a photo of a house with a lawn.
- Mowing Summary:** A table with columns for Amount, Est Margin, and Hours. The values are \$200.00, 55.00%, and 2 respectively.
- Labour Summary:** A table with columns for Cost, Amount, and Profit. The values are \$90.00, \$200.00, and \$110.00 respectively.
- Material Summary:** A table with columns for Cost, Amount, and Profit. The values are \$0.00, \$0.00, and \$0.00 respectively.

» You can get rid of an option by pressing **Delete**

The screenshot shows the same 'Mowing and gardening - Mowing only' job setup page as above. The layout and data are identical, but the 'Delete' button next to the 'Mowing only Option' is highlighted with a green arrow.



» When the customer selects this option, you indicate this by choosing **Apply Customer Selected Option**

The screenshot displays the 'Business Management' software interface for a job entry. The main title is 'Mowing and gardening - Mowing only'. Key job details include: Customer Name: Daniel Coyle, Est Labour Price: \$200.00, Est Material Price: \$0.00, Amount inc Tax: \$220.00, Est Hours: 2.00, and Est Gross Margin: 55%. The interface is divided into several sections:

- Mowing only Option:** Contains a table with columns 'Name' and 'Description'. The entry 'Mowing only' has the description 'Mow front and back lawns'. Below this table is a button labeled 'Apply Customer Selected Option', which is highlighted by a green arrow.
- Job Tasks (2):** A table listing tasks: 'Site Visit' (Travel, \$50.00) and 'Doing the Job' (Mowing, \$150.00).
- Job Materials (0):** A table with columns 'DESCRIPTION', 'QUANTITY', and 'TOTAL'.
- Mowing Summary:** A summary table showing: Amount \$200.00, Est Margin 55.00%, and Hours 2. Below this is a table with columns 'Cost', 'Profit', and 'Total', showing values of \$90.00, \$110.00, and \$220.00 respectively.
- Labour Summary:** A section with a 'Calculated' table showing Cost \$90.00, Amount \$200.00, and Profits \$110.00. It also includes an 'Estimated Labour Override' field.
- Material Summary:** A section with a 'Calculated' table showing Cost \$0.00, Amount \$0.00, and Profits \$0.00. It also includes an 'Estimated Material Override' field.



To add a second option, simply add another option to the job plan.

Given our example, this time we're going to make sure that both mowing and gardening lines are chosen.

Create Quote Option

Name	Description
<input type="text" value="Deluxe"/>	<input type="text" value="Mowing & Gardening"/>
<input checked="" type="checkbox"/> 1: Mowing	
<input checked="" type="checkbox"/> 2: Gardening	

This will result in our second option containing both mowing and gardening lines.

The screenshot displays a software interface for managing quotes. At the top, there's a navigation menu with options like 'Business Management', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', and 'Material Price Lists'. Below this, a header section shows job details for 'JN-00190 Mowing and gardening - Deluxe', including customer name 'Daniel Coyle', estimated labour price '\$550.00', estimated material price '\$0.00', amount including tax '\$605.00', estimated hours '5.50', and estimated gross margin '55%'. The main content area is divided into several sections: 'Deluxe Option' with name 'Deluxe' and description 'Mowing & Gardening'; 'Job Tasks (2)' with a table listing 'Site Visit' (Travel, \$50.00) and 'Doing the Job' (Mowing, \$150.00); 'Job Materials (0)'; 'Mowing' section with a description 'Mow front, side and rear lawns.' and an image of a lawn; and three summary tables: 'Mowing Summary' (Amount \$200.00, Est Margin 55.00%, Hours 2), 'Labour Summary' (Cost \$90.00, Amount \$200.00, Profit \$110.00), and 'Material Summary' (Cost \$0.00, Amount \$0.00, Profit \$0.00).

How to send an email containing multiple quote options

If you've created a Job Plan containing two or more options, you may want to send both options to the customer in a single email.



This topic builds on "How to create a quote with options" on page clxi. Make sure you read that topic first.

To send a customer a quotation with options

1. Select the first quote option, then press the **Quote Preview** expand button.

The screenshot shows the 'Business Management' software interface for a quote titled 'Mowing and gardening - Mowing only'. The quote details include Customer Name: Daniel Coyle, Est Labour Price: \$200.00, Est Material Price: \$0.00, Amount Inc Tax: \$220.00, Est Hours: 2.00, and Est Gross Margin: 55%. The 'Show All' dropdown is set to 'Mowing only'. The main content area displays a 'Mowing' job with a description 'Mow front, side and rear lawns.' and a photo of a property. Summary cards for 'Mowing Summary', 'Labour Summary', and 'Material Summary' are visible on the right. A 'Quote Preview' button is located at the bottom right, with a green arrow labeled '2' pointing to it.

2. Select **Generate Quote**.

This screenshot shows the same software interface as the previous one, but with the 'Quote Preview' window expanded. The window displays the quote details for 'Hire A Hubby Birchip (Training)'. It includes contact information for the company and the customer, a description of the work 'Mowing only: Mow front and back lawns', and a total price of \$220.00. A green arrow points to the 'Generate Quote' button at the bottom right of the 'Quote Preview' window.

3. Allow the quote to finish generating, then press **Cancel**.

Compose Email

Send to

One or more contacts ⓘ

Daniel Coyle (daniel.coyle@gmail.com)

Enter CC addresses My Inbox (bcc)

Separate multiple addresses with a comma

Template

Select a template Set As Default Template

NextDoc - Quote Attached - Generic

Content Edit Content

Using the selected template for email content.

Selected Attachments

 PDF

QN-00384.1_Mow...

QN-00384.1_Mowing only

Add Attachments

Upload Additional Files

Or drop files



The generated quote is named using the quote option Name, and the generated PDF stored against the Job record. Now press **Cancel**.

- Now select the second quote option, then (following the same steps above) open the **Quote Preview** pane and generate another quote.

Compose Email

Send to

One or more contacts ⓘ

Daniel Coyle (daniel.coyle@gmail.com)

Enter CC addresses My inbox (bcc)

Separate multiple addresses with a comma

Template

Select a template Set As Default Template

NextDoc - Quote Attached - Generic

Content Edit Content

Using the selected template for email content.

Selected Attachments

 QN-00384.2_Del...

Add Attachments

Upload Additional Files

Or drop files

Add Attachments From Record

QN-00384.1_Mowing only.pdf

- From the **Add Attachments From Record**, check the previously-generated quote. This will be added to the **Selected Attachments** list.

Compose Email

Send to

One or more contacts ⓘ

Daniel Coyle (daniel.coyle@gmail.com)

Enter CC addresses My inbox (bcc)

Separate multiple addresses with a comma

Template

Select a template Set As Default Template

NextDoc - Quote Attached - Generic

Content Edit Content

Using the selected template for email content.

Selected Attachments

QN-00384.2_Del... QN-00384.1_Mow...

Add Attachments 1

Upload Additional Files

or drop files

Add Attachments From Record

QN-00384.1_Mowing only.pdf

- Now both quote versions are attached to the email. You can now adjust the recipients, accept or change the template, and adjust the content of the email as you normally would.
- When you're ready, press **Send**.



An email will be sent to the selected recipients containing each selected quote version.

How to generate an invoice

You can generate an invoice directly from the job planning page. Simply click the **Invoice Job** button.

FRANCHISE CLOUD SOLUTIONS

Business Manage... Home Chatter Accounts Jobs Contacts Job Offers Job Calendar Invoices Payments Customer Feedback Material Price Lists More

JN-00524 Smith - Shower regrout Save Save and Back Invoice Job Cancel

Customer Name: Geoff Smith Est Labour Price: 5818.18 Est Material Price: 50.00 Amount Inc Tax: 5900.00 Est Hours: 0.00 Est Gross Margin: 100%

Premium Shower Makeo... + -

Job Tasks (0) New

NAME	DESCRIPTION	TOTAL
------	-------------	-------

Job Materials (0) New

DESCRIPTION	QUANTITY	TOTAL
-------------	----------	-------

Premium Shower Makeover

*Summary Premium Shower Makeover Include

Description

Salesforce Sans 12 B I U L S

- Remove all silicone seals from shower recess
- Remove all old grout from shower walls
- Remove old grout from shower floor
- Remove old grout from shower hob
- Full deep clean of all grout joints and tiles
- Disinfect and clean shower tiles using a specialised cleaning solution
- Regrout shower walls with FS00 premium sealed ultra-white grout
- Regrout shower floor with premium 2-part epoxy grout
- Seal shower floor perimeter seals with premium epoxy grout
- Seal shower floor waste with premium epoxy grout

Work Order Description

Salesforce Sans 12 B I U L S

Premium Shower Makeove...

Amount	Est Margin	Hours
5818.18	100.00%	0
Cost	Profit	Total
50.00	5818.18	5900.00

Labour Summary

Calculated

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Estimated Labour Override Inc Tax

\$900.0000

Material Summary

Calculated

Cost	Amount	Profit
\$0.00	\$0.00	\$0.00

Estimated Material Override

Enter a value



For more information about generating invoices, See “Invoicing a job” on page ccxlix.

How to clone a job

There may be times where you want to make a copy of an entire job (including the job plan).



You may want to clone a job when you are performing regular work for a given customer (e.g. mowing or gardening).

To clone a job

1. Open a job that contains the job plan that you want to clone.
2. From the **Job**, press **Clone**.

The screenshot shows a software interface for job management. At the top, there's a navigation bar with various menu items like 'Home', 'Chatter', 'Accounts', 'Jobs', etc. Below that, the job details for 'JN-00486' are displayed. A green arrow points to the 'Clone' button in the top right corner of the job header area. The main content area shows job details such as 'Job Name: Grover - Gardening', 'Status: Planning', and 'Estimated Gross Profit: \$52.50'. There are also sections for 'Files (0)', 'Notes (0)', and 'Activity'.

3. From the **Clone This Job** dialog box, press **OK**.

Clone This Job

You are about to create an identical job and its line items and their tasks and materials.

The system creates a new copy of the entire job, including the Job Plan. The cloned job is now ready for you to issue a quote or invoice.

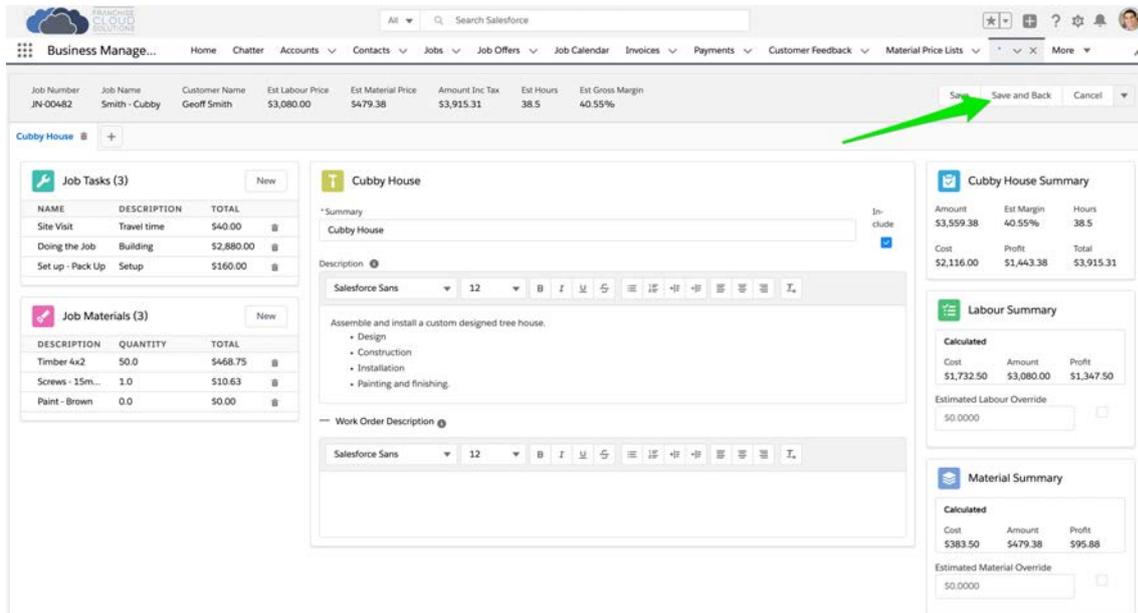


You can create a series of cloned jobs when you create recurring appointments. See “How to schedule repeating appointments” on page ccxi.

How to return to the Job

To save and go back to the Job

- » Press Save and Back.



The Job page displays.



When you have a saved Job Plan, the Job automatically advances to the Planning status.

To return to the Job without saving

- » Press Cancel.

How to print a materials shopping list

Business Management allows you to generate shopping lists for materials you need in order to complete a job. To use the material shopping list, you must first have added materials to your Job Plan and marked which ones are In Stock.



When the materials are recorded, your job will look something like this.

The screenshot displays a software interface for job management. At the top, there's a navigation bar with options like Home, Chatter, Accounts, Contacts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, and Material Price Lists. Below this, a header section shows job details: Job Number JN 00482, Job Name Smith - Cubby, Customer Name Geoff Smith, Est Labour Price \$3,080.00, Est Material Price \$548.13, Amount Inc Tax \$3,990.94, Est Hours 38.5, and Est Gross Margin 40.16%. The main content area is divided into several sections: 'Job Tasks (3)' with a table of tasks like Site Visit, Doing the Job, and Set up - Pack Up; 'Job Materials (3)' with a table of materials like Timber 4x3, Screens - 15m, and Paint - Brown; 'Cubby House' section with a description and a list of tasks; 'Cubby House Summary' with financial data; 'Labour Summary' with cost, amount, and profit; and 'Material Summary' with cost, amount, and profit. The 'Job Materials (3)' table is highlighted with a green border.

NAME	DESCRIPTION	TOTAL
Site Visit	Travel time	\$40.00
Doing the Job	Building	\$2,880.00
Set up - Pack Up	Setup	\$160.00

DESCRIPTION	QUANTITY	TOTAL
Timber 4x3	50.0	\$468.75
Screens - 15m	1.0	\$10.43
Paint - Brown	1.0	\$68.75

Amount	Est Margin	Hours
\$3,628.13	40.16%	38.5

Cost	Amount	Profit	Total
\$2,171.00	\$1,457.13	\$3,990.94	

Cost	Amount	Profit
\$1,732.50	\$3,080.00	\$1,347.50

Cost	Amount	Profit
\$438.50	\$548.13	\$109.63



To add materials to a job plan, See “Detailed quote: Add materials and material estimates” on page cxliii.

How to print a materials shopping list for a job

A materials shopping list depends on you listing all the materials needed for the job during job planning.

To print a materials shopping list

1. From the Job, click the **Quotes/Invoices** tab, then click the **Job Material Shopping List** link.

The screenshot shows the 'Business Management' interface for job JN-00482. The 'Quotes/Invoices' tab is selected. In the 'Quote Information' section, the 'Job Material' dropdown menu is open, and the 'Shopping List' option is highlighted with a green arrow. Other tabs like 'Financial Breakdown', 'Feedback/Marketing', 'Files & Notes', and 'History' are also visible.

2. The **Materials Shopping List** report displays.

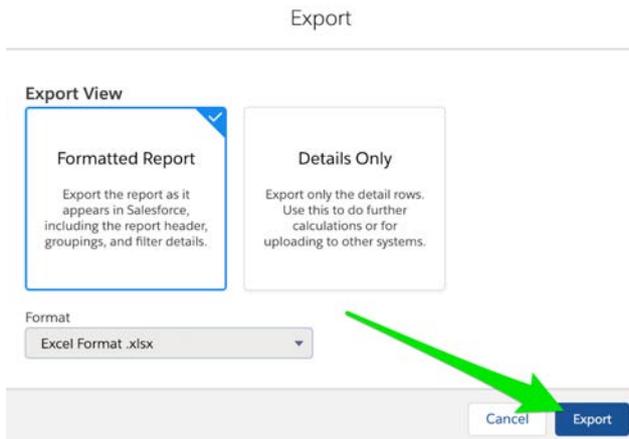
The screenshot displays the 'Report: Job Material List Material Shopping List'. The report shows a table with the following data:

Job Name	Summary	Description	Job Material Reference	Quantity	Size	Supplier	Supplier Part #	Material Total
Maxwell (3)	Gardening service (3)	Timber 4x2	JMR-1526741	5.00	-	Bunnings	-	AUD 71.88
		Dulux Metalshield High Gloss White Epoxy Enamel Spray paint	JMR-1526742	4.00	-	bunnings	-	AUD 54.74
		125mm Batten Bugle Head Timber Screws - 100 Pack	JMR-1526743	1.00	-	bunnings	-	AUD 27.60
	Subtotal							
	Total (3)							

3. Export the report.

The screenshot shows the same report as above, but with a dropdown menu open. A green arrow labeled '1' points to the dropdown arrow in the top right corner. A second green arrow labeled '2' points to the 'Export' option in the dropdown menu.

4. The Export dialog box appears with the export set to *Formatted Report*. Press **Export**.



5. The report is now exported to a Microsoft Excel format. You can now print it using Microsoft Excel or any program compatible with that format.

How to handle variations

There are a number of techniques for dealing with variations. You will likely want to adopt different approaches based on when in the job lifecycle the customer requests a variation.

You've sent a quote and the customer wants to proceed with select line items only

1. From the **Job**, open the **Job Plan**.
2. Exclude any line items the customer indicates they do not wish to proceed with. See "How to exclude a line item" on page cliv.
3. Press **Save and Back**.
4. Now you can proceed to indicate the customer acceptance, schedule it and follow your normal process.

You've started delivering a job, and the customer chooses to add to it

1. From the **Job**, open the **Job Plan**.
2. Create one or more new line items. Label each new line item *Variation* (and then describe the variation).
3. Enter the details for the costs.
4. Produce a new quote containing either:
 - a. The full quote, now including the variation lines, OR
 - b. A partial quote, containing only the variation lines.

5. On receipt of customer approval, continue with the job.

Of course, sometimes the customer's request will be akin to a completely new job. If this occurs, you might choose to do the following.

The customer adds a complex new delivery

1. Clone the current job. See "How to clone a job" on page clxxiv.
2. From the cloned job, modify the **Job Plan** as required.
3. Generate the new quote. Obtain customer approval, and proceed as per any other new job.

Customer quote acceptance

Quotes can be accepted in the following ways:

1. You can include a customer acceptance link within your email template. When you include this link, your customer can click the link and accept the quote online.



FCS Birchip
0431661077 support@franchisecloudsolutions.com

Option: Mowing only Customer: Daniel Coyle Quote: QN-00384.1 Date: 21/10/2021 Amount: \$220.00	Option: Deluxe Customer: Daniel Coyle Quote: QN-00384.3 Date: 21/10/2021 Amount: \$605.00	
Accept Quote	Accept Quote	Decline All Quotes

Please verify the Quote Number and Amount match before accepting.



FCS Birchip
0431661077
support@franchisecloudsolutions.com
12 Lockwood Street, Birchip, NSW, 3483
ABN: 12 345 678 901
Subject to Standard Terms and Conditions.



Speak to your system administrator for assistance configuring the customer acceptance link within your email template.

2. The customer may call you to accept a quote, in which case you need to record their selection.
 - a. If the **Plan Job** contains **Quote Options**, you need to open the Job Plan, select the chosen option, then press the **Apply Customer Selected Option**.
 - b. Otherwise, set the **Job's Status** and **Sub-status** to indicate the quote has been accepted.



Status and Sub-status names are implementation dependent. If you're not sure, speak with your field manager.

How to access job scheduling	cxcii
Setting up Job Calendar	cxciii
Scheduling Jobs	cxcviii
Adjusting appointments	ccxxv

Understanding Job Calendar

Job Calendar is your digital hub for managing customer appointments. Job Calendar makes it easy for you to

- » plan when each of your people will attend customer appointments
- » show you exactly how much time has been scheduled onto the calendar
- » send notifications to customers reminding them of an upcoming appointment
- » make rapid changes to a day's schedule, even when you're on-the-road



In reading this chapter, there are a few terms that would be useful for you to know.

- » In this guide, **event** and **appointment** are closely related. They almost always mean the same thing.
- » To make it easier to refer to the people you're scheduling—who might be the franchisee, an employee or a contractor—we call them **resources** or **assignees**. On Job Calendar, resources or assignees are the people who are scheduled to do the work.

What Job Calendar can do for you

Job Calendar contains features that make it easy to create a schedule, including

- » multiple views of your calendar
- » ability to rapidly create appointments for multi-person and multi-day jobs
- » easily create periodic repeating appointments
- » flexibility to modify an entire series, just a single appointment, or all later appointments in the series
- » ability to make changes on-the-run using a mobile device

Some of the features that make Job Calendar ideal for managing a busy franchise is that it

- » schedules job and non-job appointments for one or multiple resources
- » reminds customers and resources of upcoming appointments
- » communicates job scheduling to contractors or employees across desktop, mobile and tablet devices so they can use it in the office or while they are on-the-road.

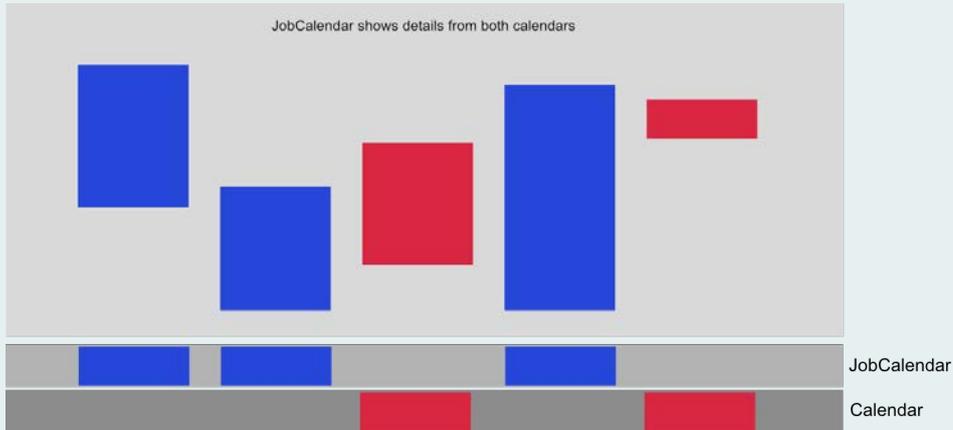
Job Calendar and Salesforce Calendar work together

Job Calendar and Salesforce's regular Calendar work together. You will mostly use Job Calendar, but there are some things for which you will use the regular Salesforce Calendar. Here's how they work together

- » When you create an event on the regular Salesforce Calendar, the appointment will appear on both the Salesforce Calendar and the Job Calendar.
- » When you create an event on the Job Calendar, the appointment will appear on the Job Calendar and the block of time for the event is blocked out on the regular Salesforce Calendar.

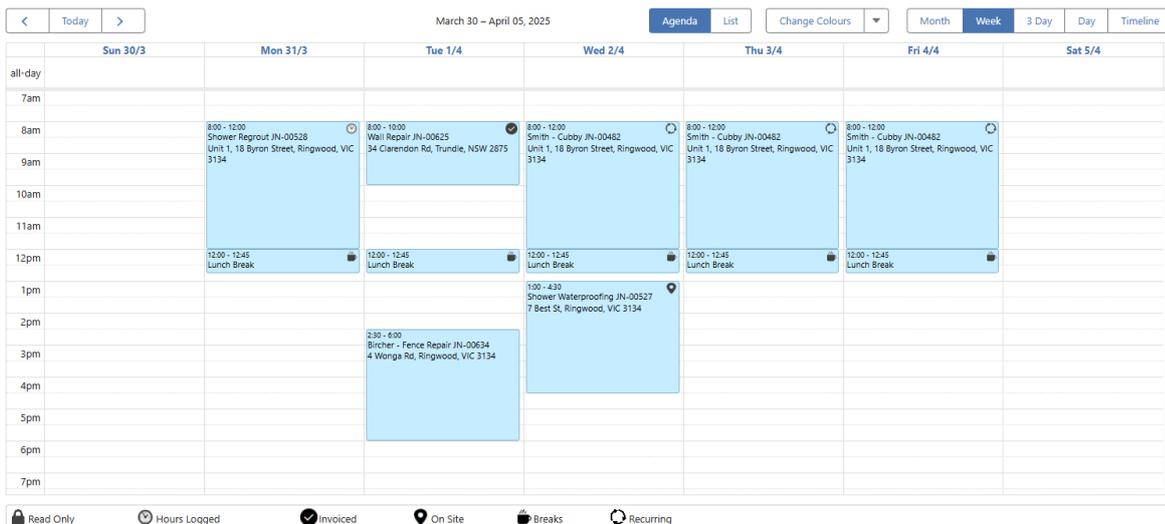


Both Calendar and Job Calendar events are displayed in either calendar. Using Job Calendar, you see all the details from both events. Using Calendar, times are blocked out for the Job Calendar events but you don't see the underlying detail.



Job Calendar shows the status of a job

Job Calendar events have icons that show the status of the job at a glance.



The meaning of each icon is described below.

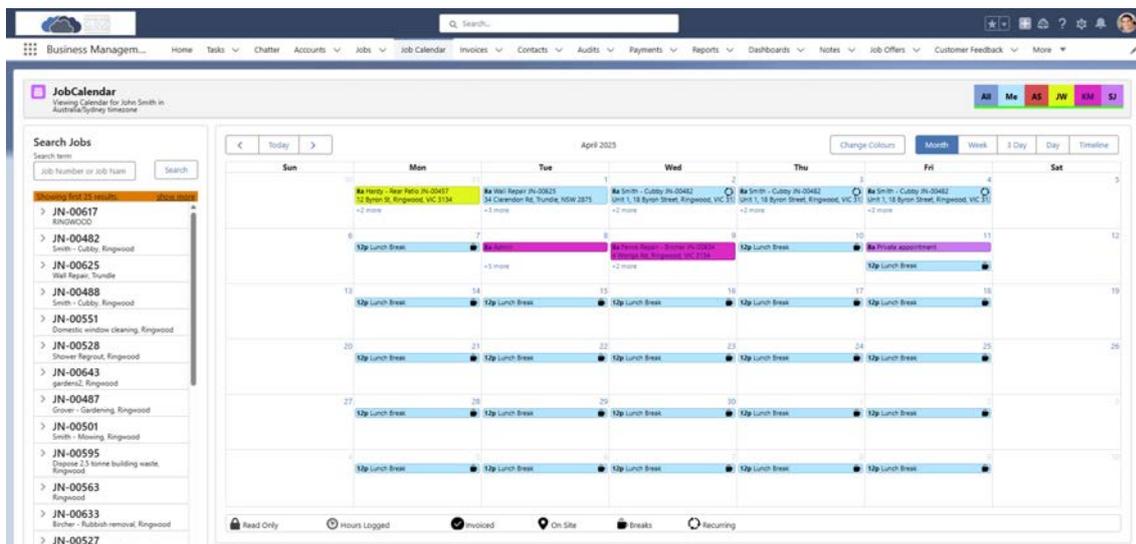
Icon	Description
Read Only	The event's related record has no job or no job visible to the current user. This might be because the user created the event on the calendar unrelated to a Job or because another user created the event using a Job for which the current user has no visibility.
On Site	A resource has checked into a job with Salesforce Mobile.

Icon	Description
Hours Logged	A resource has logged Actual Hours with Salesforce Mobile.
Invoiced	Actual Hours have been logged AND an Invoice has been generated.
Recurring	The appointment is part of a repeating series.
Breaks	A break has been scheduled (usually from Salesforce Calendar).

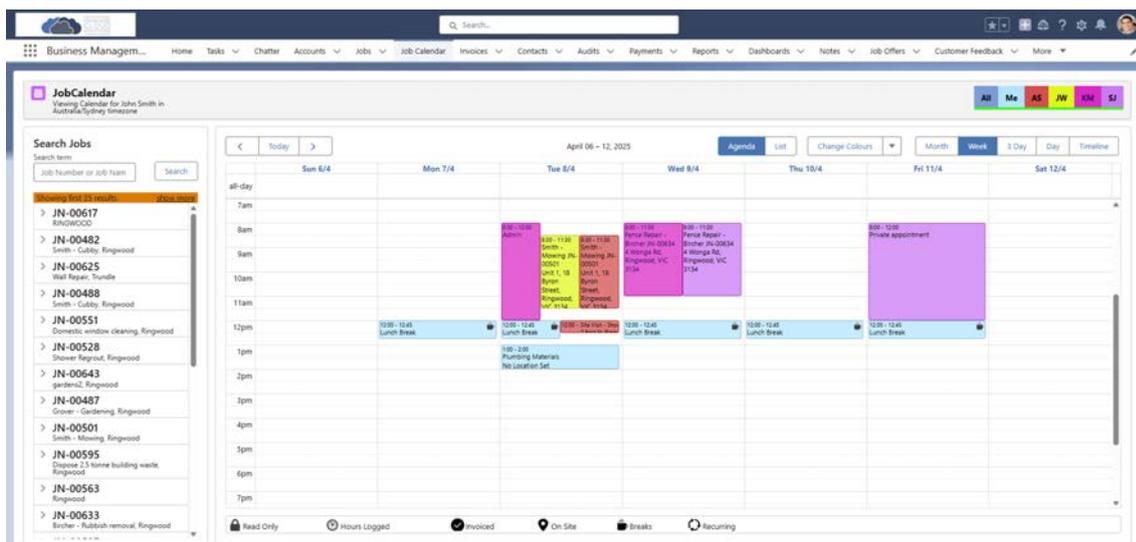
Job Calendar can show a range of views

Job Calendar can show a range of different views

» Month view



» Week view



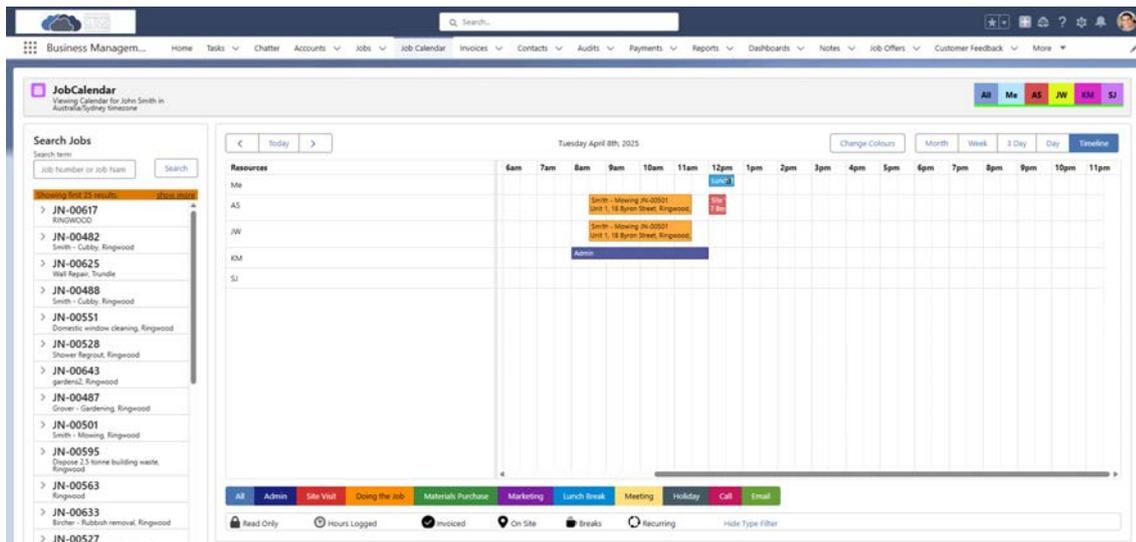
» 3 Day view

The screenshot shows the JobCalendar interface in 3 Day view for the dates April 08 - 10, 2025. The interface includes a top navigation bar with menu items like Home, Tasks, Chatter, Accounts, Jobs, Job Calendar, Invoices, Contacts, Audits, Payments, Reports, Dashboards, Notes, Job Offers, and Customer Feedback. A search bar is located at the top center. The main content area is divided into three columns representing the days: Tue 8/4, Wed 9/4, and Thu 10/4. A vertical timeline on the left side of each day column shows job blocks with their start and end times. For example, on Tuesday, there are jobs from 8am to 11am, 12pm to 12:45pm (Lunch Break), and 1:00pm to 2:00pm. On Wednesday, there are jobs from 8am to 11am, 12pm to 12:45pm (Lunch Break), and 1:00pm to 2:00pm. On Thursday, there are jobs from 8am to 11am and 12pm to 12:45pm (Lunch Break). A search jobs sidebar is on the left, listing various jobs with their IDs and descriptions. At the bottom of the calendar view, there are icons for Read Only, Hours Logged, Invoiced, On Site, Breaks, and Recurring.

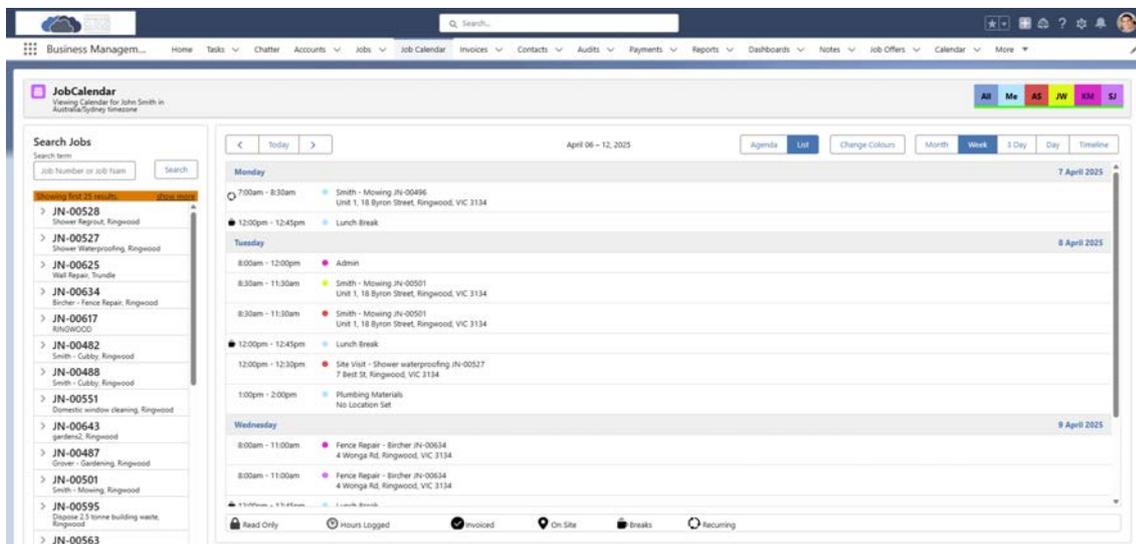
» Day view

The screenshot shows the JobCalendar interface in Day view for Tuesday, April 08, 2025. The interface is similar to the 3 Day view, but the main content area is focused on a single day. The vertical timeline on the left side shows job blocks for the entire day. For example, there are jobs from 8am to 11am, 12pm to 12:45pm (Lunch Break), and 1:00pm to 2:00pm. The search jobs sidebar is on the left, and the bottom navigation bar is also present.

» Timeline view



» List view



Job Calendar events can be colour-coded by Type

The display colour of an event on the Job Calendar can depend on the `Type` of event. This color-coding feature is available when a single resource is selected. To view more than one resource's events colour-coded by type, click **Group By Resource**. This option is available in the **Week**, **3 Day**, and **Day** views.



The **Group By Resource** button can be found above the calendar either next to **Change Colours** or in the drop-down menu located next to **Change Colours**, depending on your display settings.

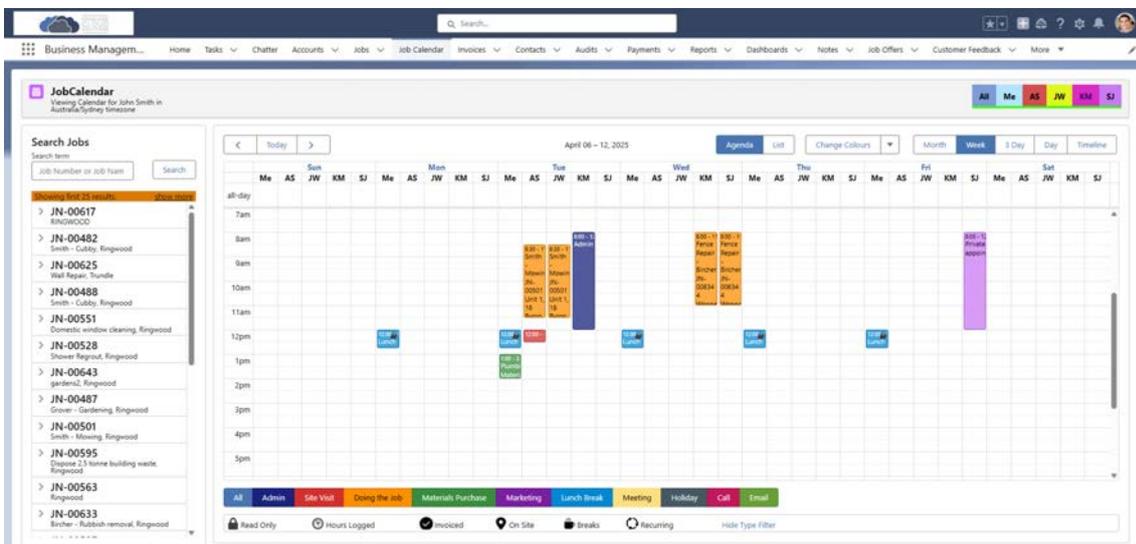


To go back to viewing events by the resource's alias colour, select **Ungroup Resources**.

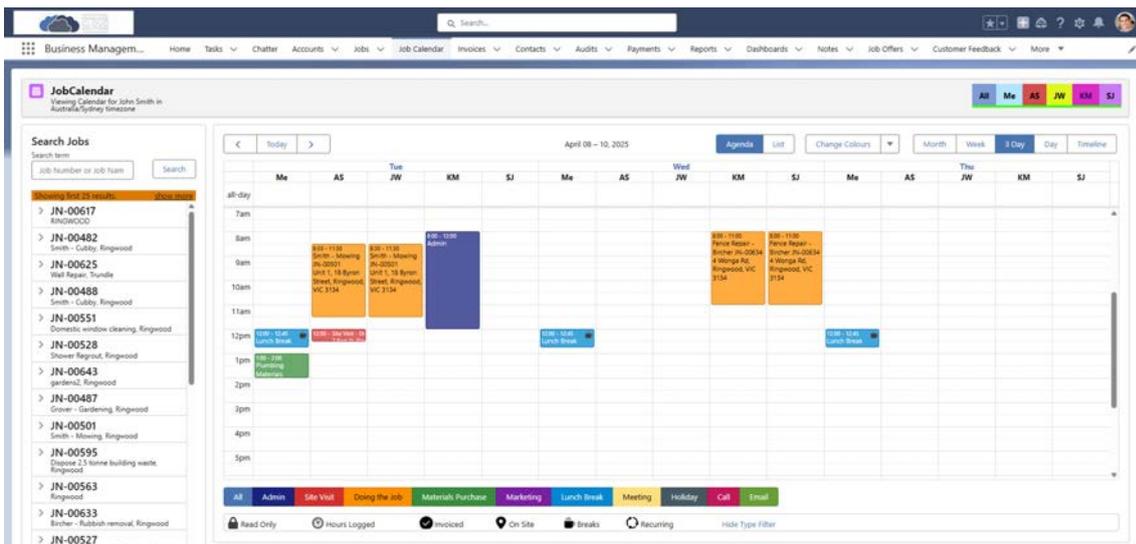


The colours for each event type are fixed and cannot be customised. The order of the event types depends on your organisation settings.

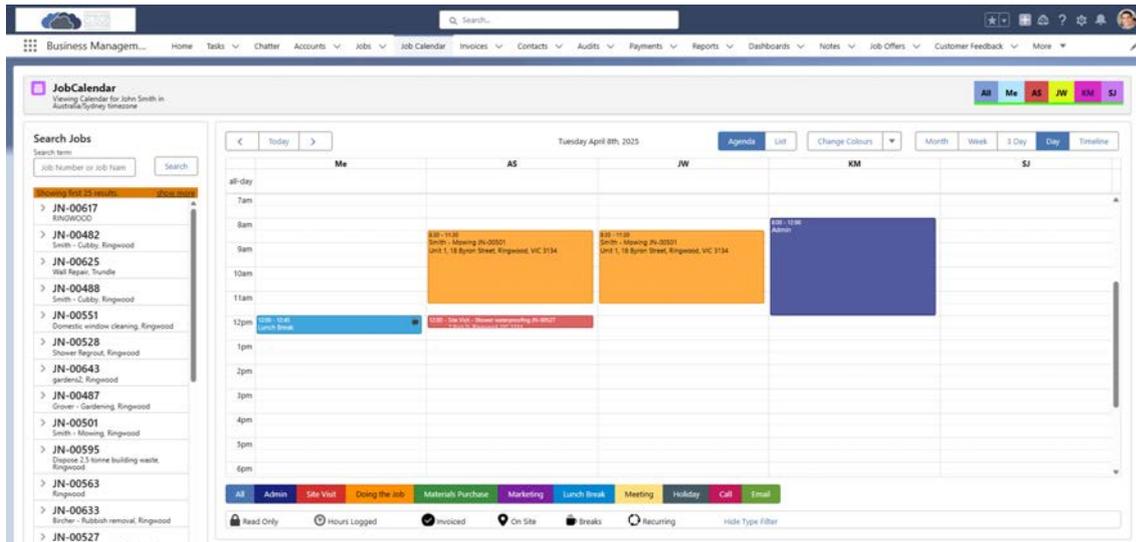
» Week view



» 3 Day view

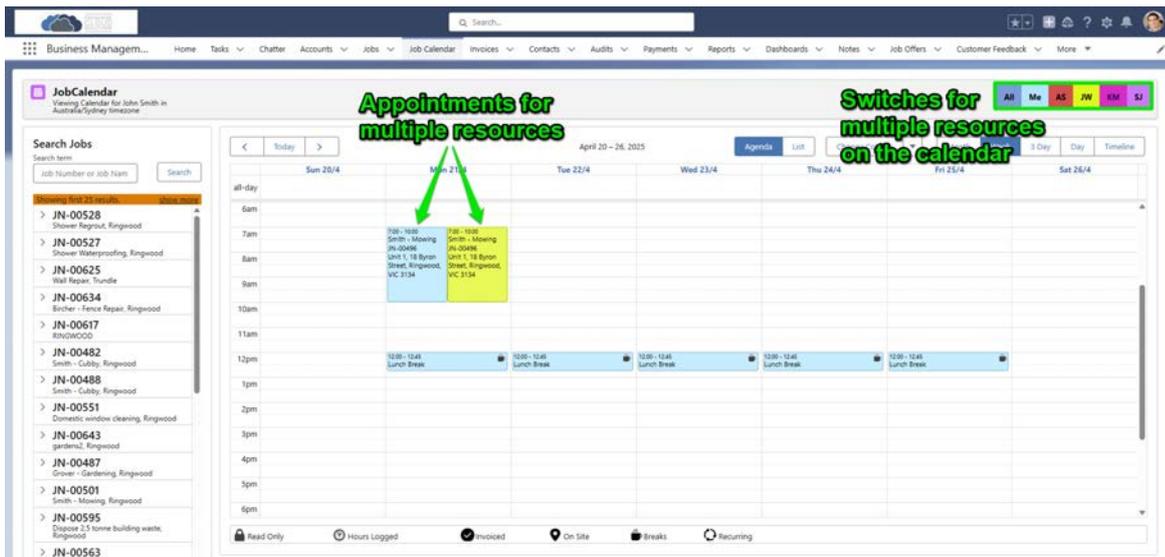


» Day view



Job Calendar and Calendar can both show calendars for multiple resources

Job Calendar has handy switches for multiple resources. You can switch on or off your view of appointments for any given resource at any time. Each resource is color-coded, and match the color of the appointments for each resource.



Calendar also has the ability to display appointments for multiple resources on a single calendar view. You can also switch on or off particular resources simply by clicking on them.

Appointments for multiple resources

Switches for multiple resources on the calendar

Repeating events for jobs in Job Calendar

Job Calendar can be used for scheduling repeating job events.



Repeating job events can be used to schedule a block of time across several days.

The screenshot shows the Job Calendar interface for John Smith. The calendar view is set to April 13-19, 2023. A repeating event is scheduled from 12:00 PM to 1:00 PM on every day from Monday to Friday. The event is titled 'Lunch Break' and is associated with job ID JN-00487. A green text overlay at the bottom of the calendar grid reads: "A single recurring event can fill a block of time".



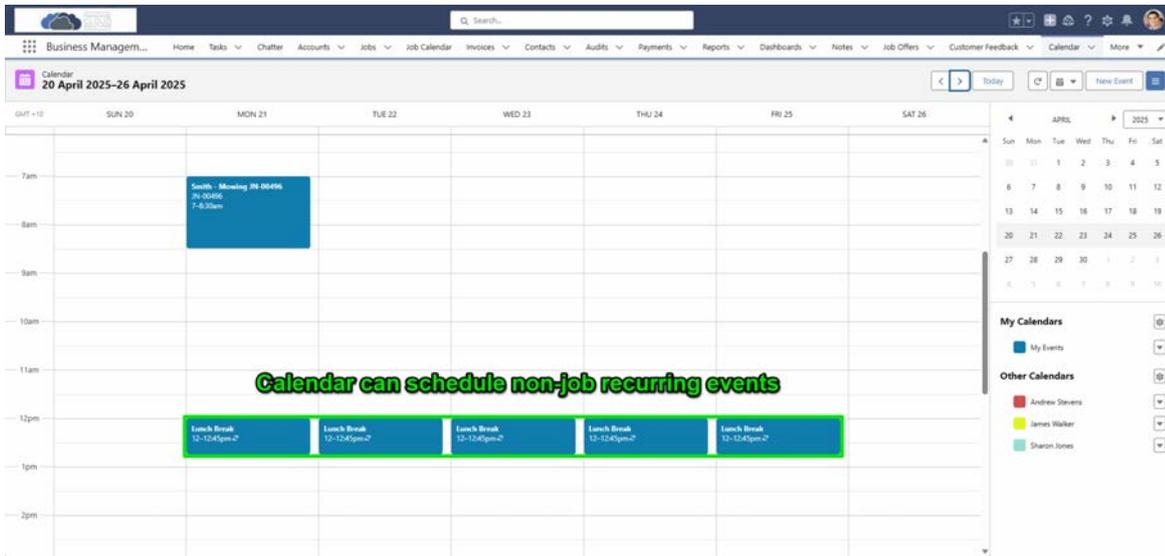
Repeating job events can also be used to schedule events that recur at fixed intervals.

The screenshot shows the Job Calendar interface for John Smith. The calendar view is set to April 2023. A repeating event series is scheduled, showing events on Monday, Tuesday, and Wednesday. The event is titled 'Lunch Break' and is associated with job ID JN-00487. A green text overlay at the bottom of the calendar grid reads: "A recurring event series can schedule work at regular intervals across days, weeks, or months".

Repeating events not related to a job in Calendar

While Job Calendar is specialized for job events, Calendar can be better for some non-job events. For example, when you want to schedule a repeating event for a non-job event (such as a lunch break) you need to schedule it using the Calendar.

Once you have scheduled the non-job repeating event on the Calendar, it will display on the Job Calendar.

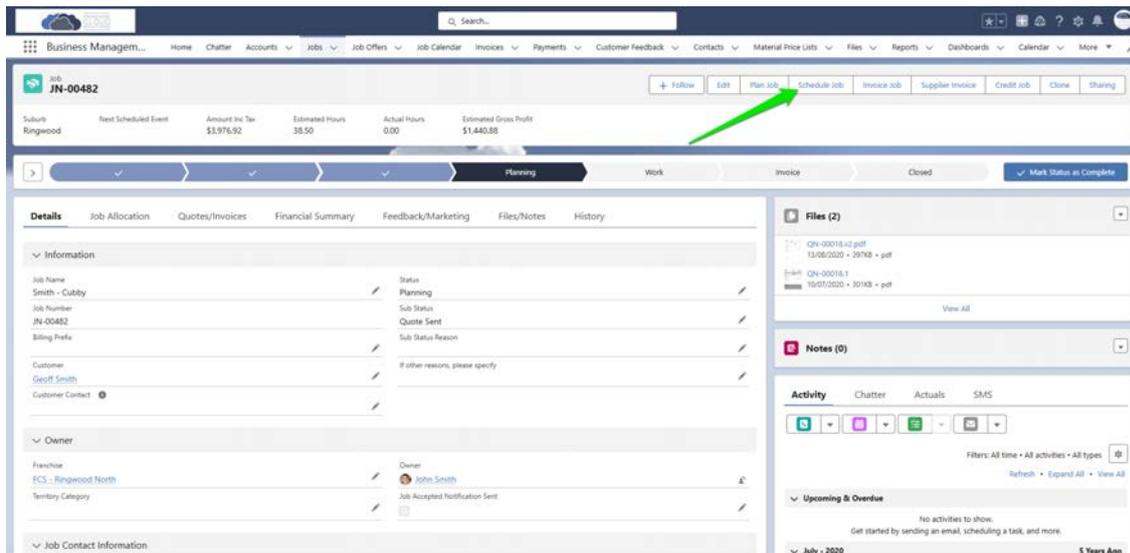


How to access job scheduling

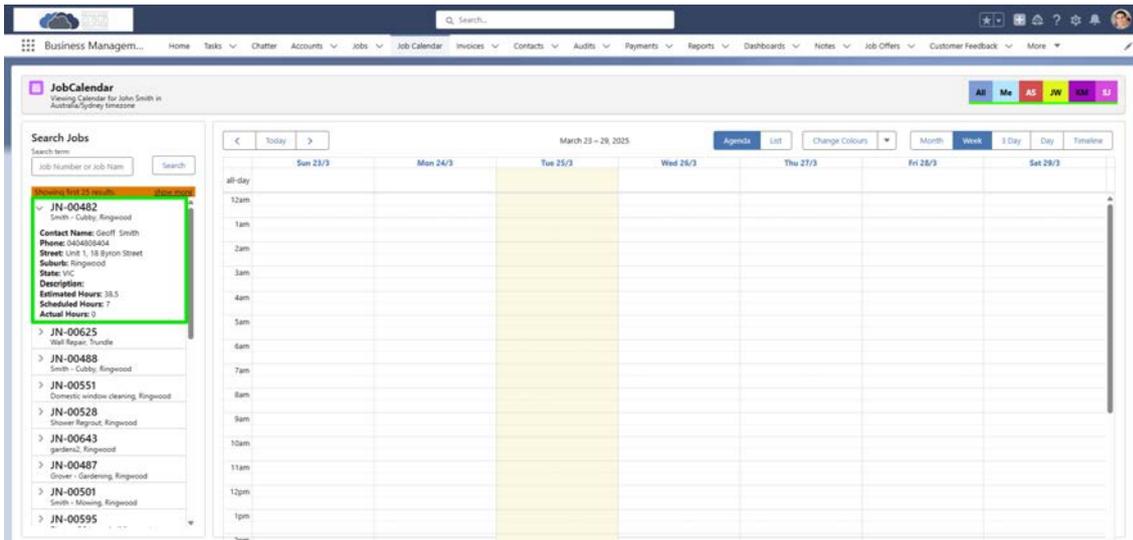
When the Job is ready to be scheduled, you schedule one or more appointments with the customer via the **Job Schedule** button.

To schedule a particular job

1. On the Job page, press the **Schedule Job** button.



2. The Job Calendar page will appear, with the current Job ready for scheduling.



3. For instructions on scheduling the Job in Job Calendar, See “Working with Job Calendar” on page clxxxii.

Setting up Job Calendar

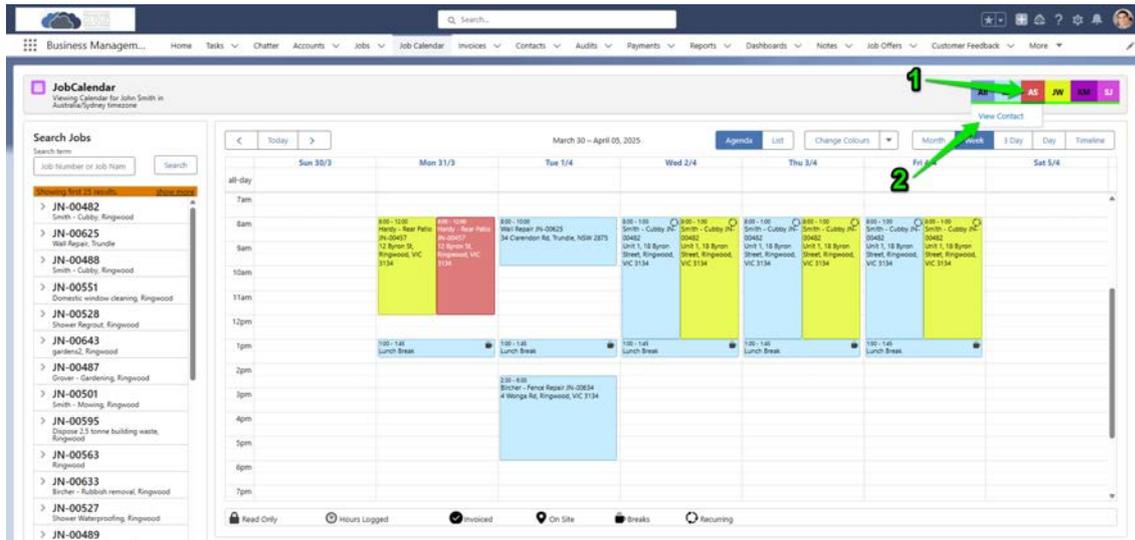
How to add, remove or alter calendar resources



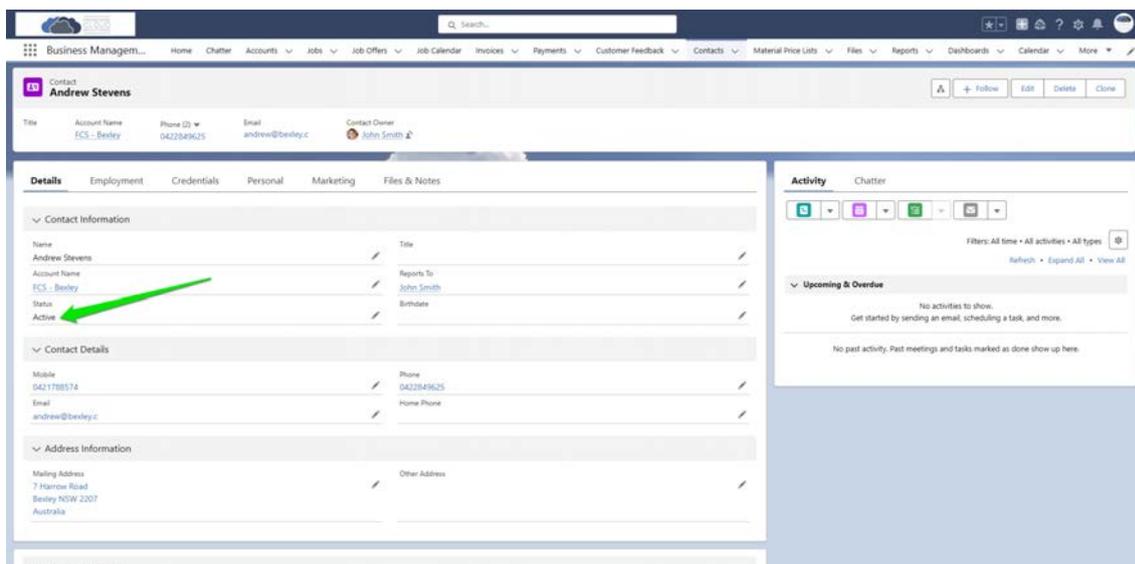
To add a Job Calendar resource, your system administrator will need to set up the new resource.

To remove a Job Calendar resource

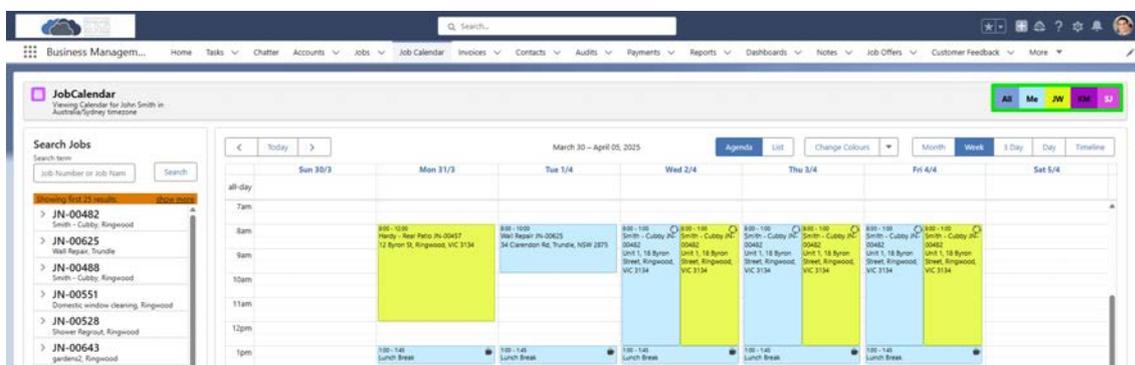
1. From the Job Calendar resource pane, right-click the resource you want to remove, then click **View Contact**.



2. Set the **Contact Status** field to *Inactive*.

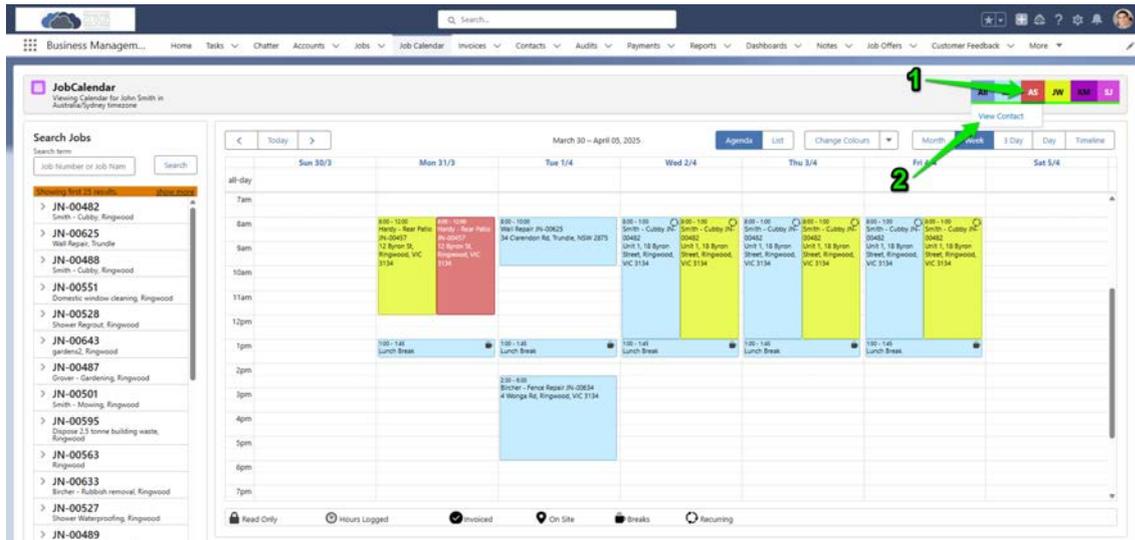


3. The resource is now removed from the Job Calendar resource pane.

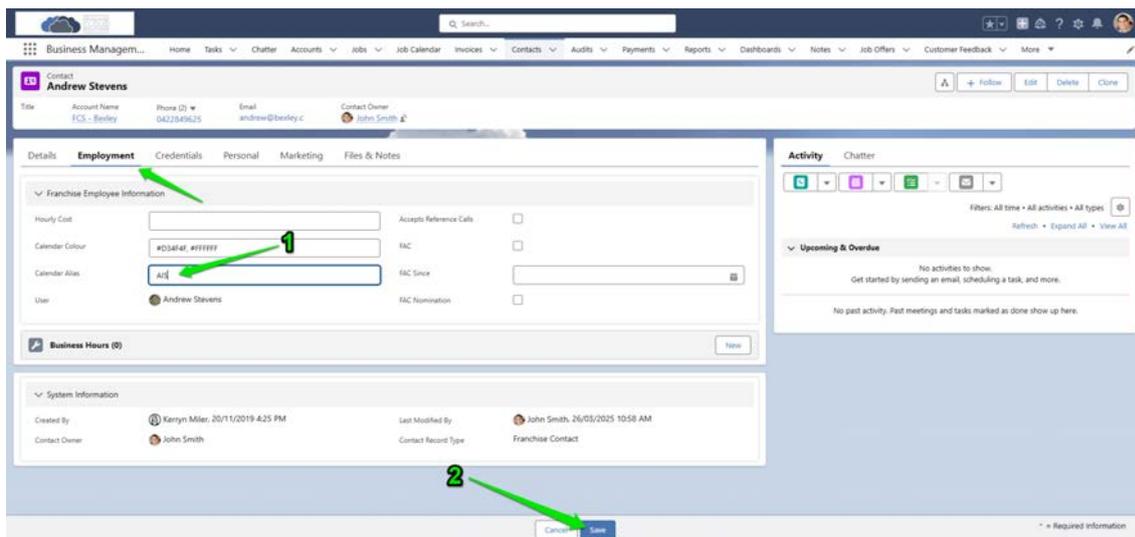


To change a name on the resource pane

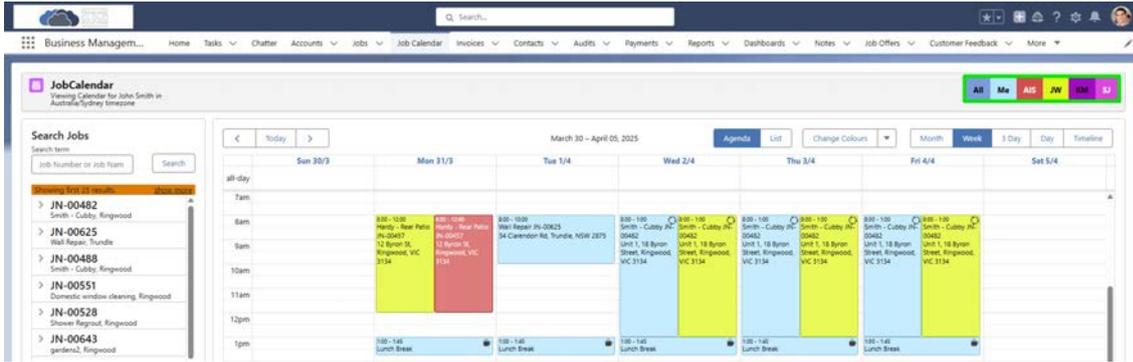
1. From the Job Calendar resource pane, right-click the resource whose alias you want to change, then click **View Contact**.



2. On the **Contact**, click on the **Employment** tab. Under the **Franchise Employee Information** section you will find **Calendar Alias**. Edit the field to change the calendar alias. Press **Save** when you're finished.



3. The alias appearing on the resource pane is now changed.

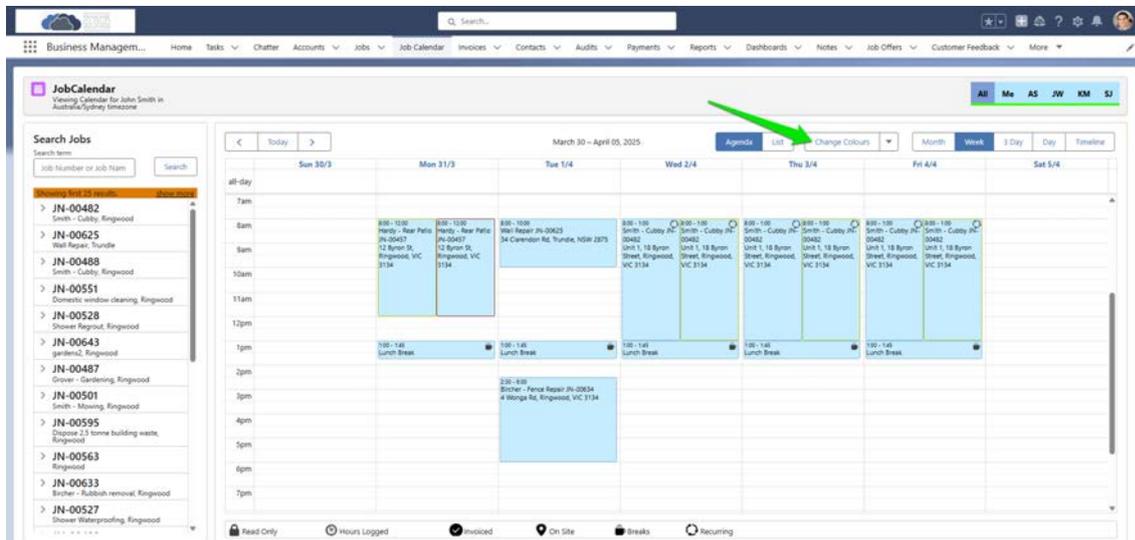


How to change calendar colours

The colour of each appointment shows which employee has been assigned the job. You can change the colours used for each employee.

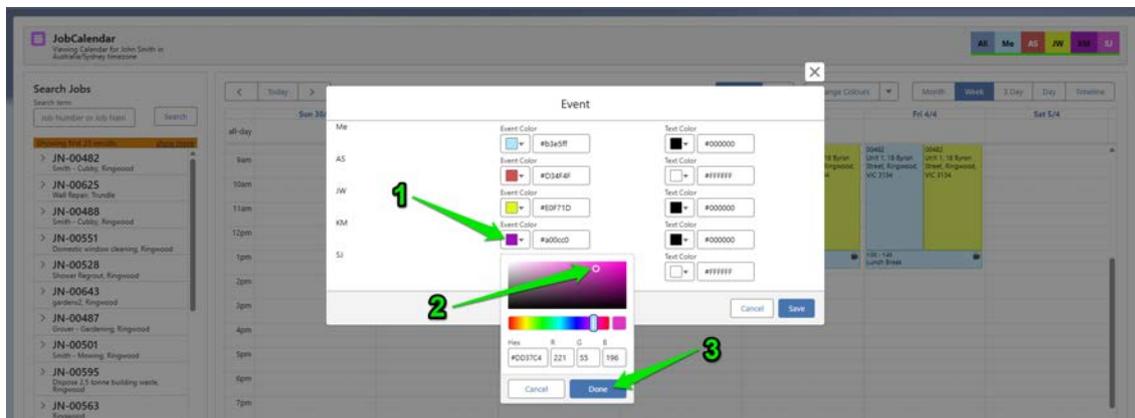
To set the calendar colour for an employee

1. From the Job Schedule, press **Change Colours**.



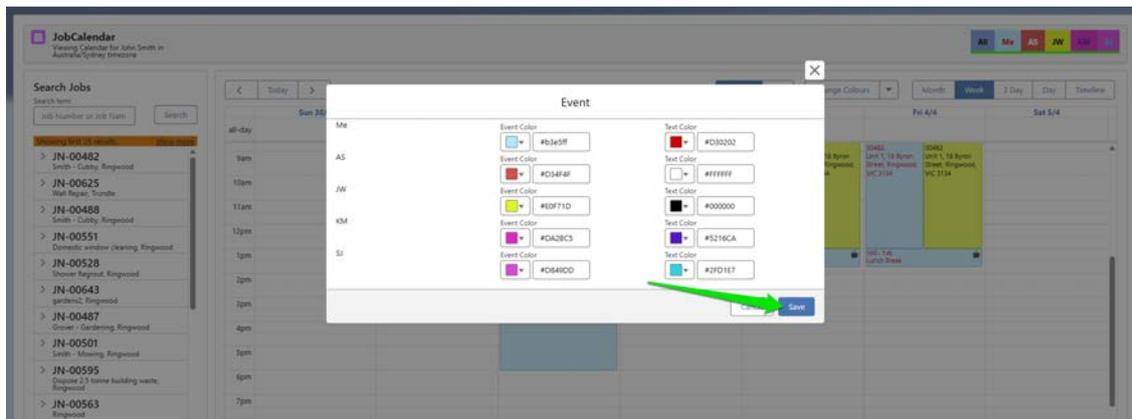
The **Event** colour picker dialog box appears.

2. Click on the **Event Color** drop down and select your desired colour, then press **Done**.

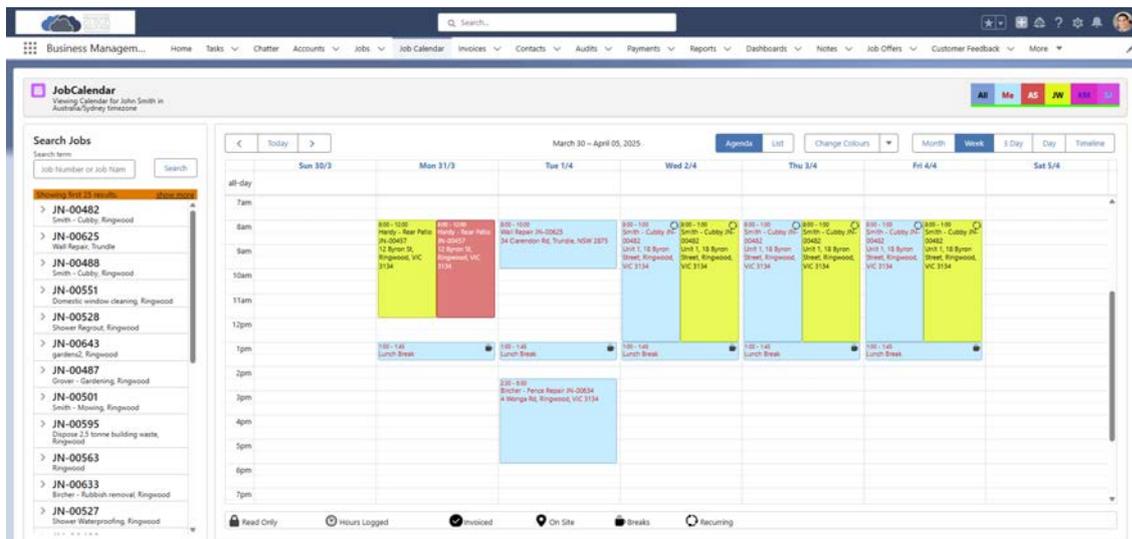


3. Change the **Text Color** in the same way.

4. When you're finished making changes, press **Save**.



5. Now you can clearly see who is assigned each job.



Scheduling Jobs

How to schedule a new appointment

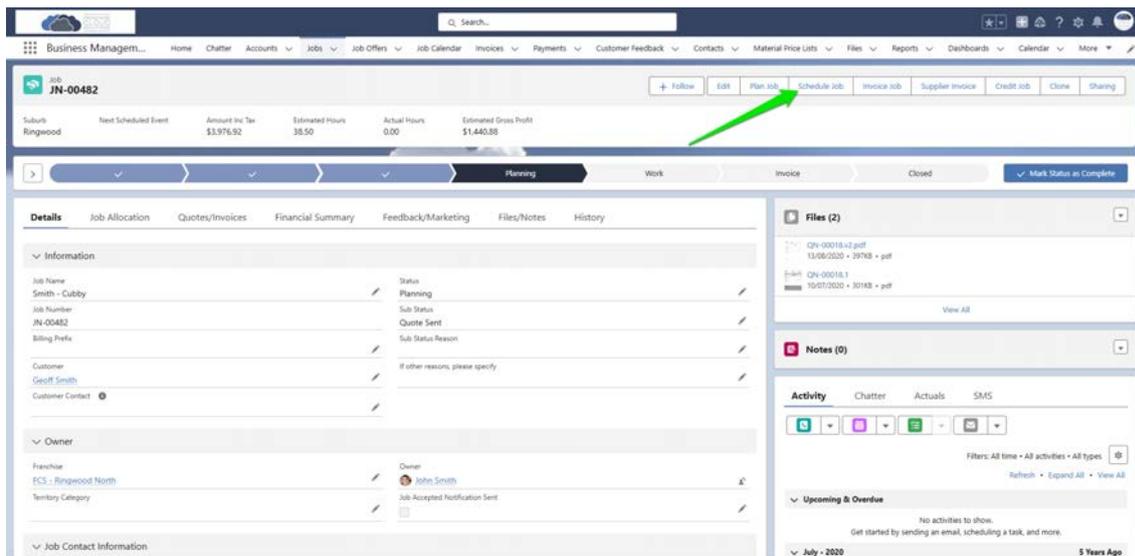
There are two ways to begin scheduling a job.

- » You can begin at the job, or
- » You can begin from the Job Calendar.

Once you're there, then you can schedule the job.

To schedule a job appointment

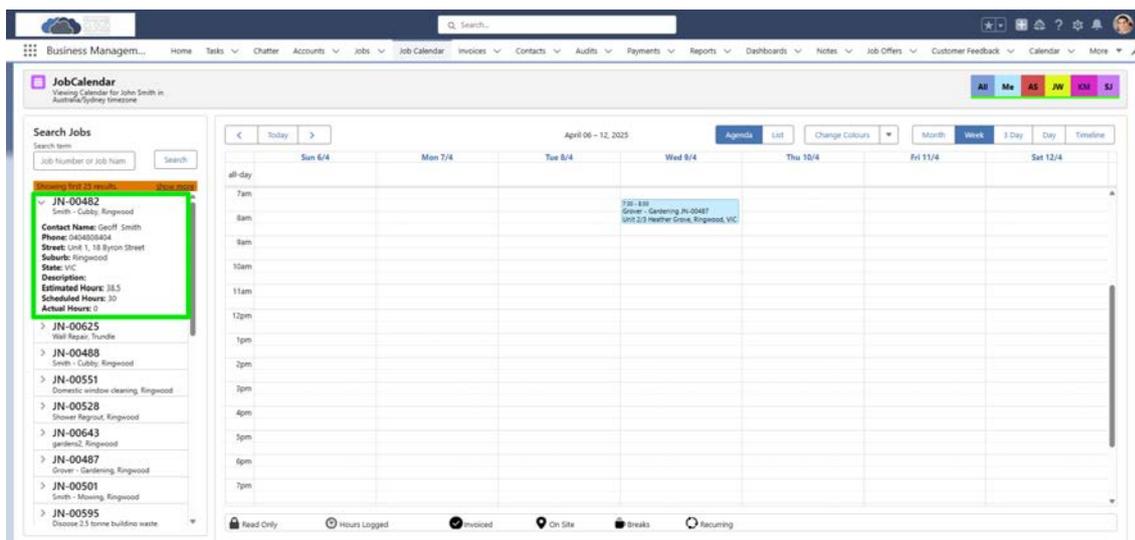
1. From the Job page, press Schedule Job.



The screenshot shows the 'Job Management' interface for job JN-00482. The job details include: Suburb Ringwood, Next Scheduled Event, Amount Inc Tax \$1,976.92, Estimated Hours 38.50, Actual Hours 0.00, and Estimated Gross Profit \$1,440.88. The job status is 'Planning'. A green arrow points to the 'Schedule Job' button in the top right corner of the job details section. Below the job details are tabs for 'Details', 'Job Allocation', 'Quotes/Invoices', 'Financial Summary', 'Feedback/Marketing', 'Files/Notes', and 'History'. The 'Details' tab is active, showing information, owner, and business information. On the right side, there are sections for 'Files (2)', 'Notes (0)', and 'Activity'.

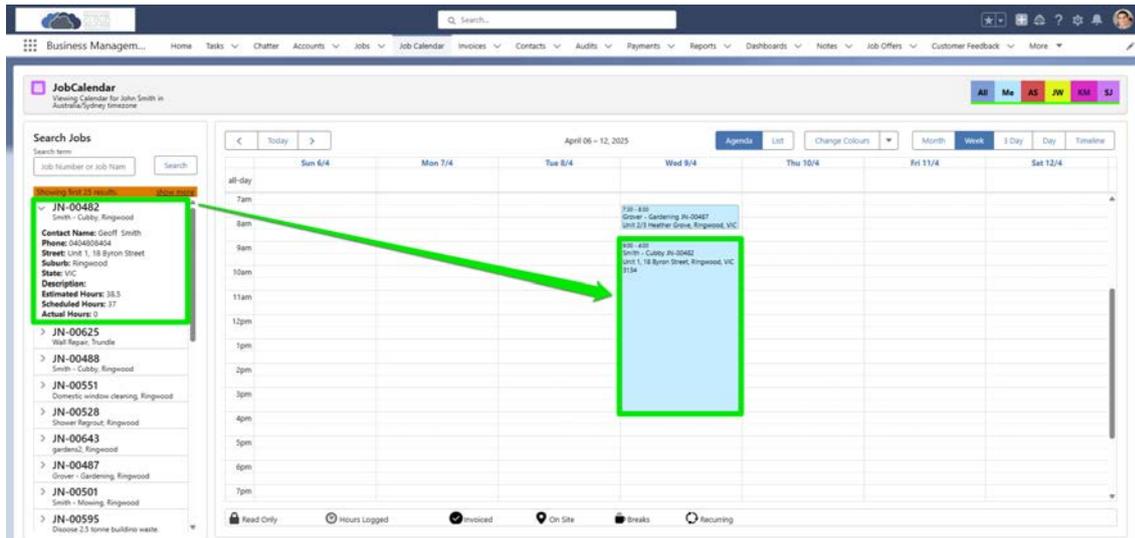
The Job Schedule page appears. You can now begin scheduling the job.

2. With the Job Calendar page in front of you, your job is already selected.



The screenshot shows the 'JobCalendar' interface for John Smith in Australia/Sydney timezone. The calendar view is for the week of April 06 - 12, 2025. A job appointment is highlighted in blue on Wednesday, April 9th, from 7am to 8am. The appointment details are: Job # 89, Name: Gardener JN-00487, and Location: 1/11 2/3 Heather Grove, Ringwood, VIC. On the left side, there is a 'Search Jobs' list with job JN-00482 highlighted in green. The list includes job numbers, names, and brief descriptions. At the bottom of the calendar, there are icons for 'Read Only', 'Hours Logged', 'Invoiced', 'On Site', 'Breaks', and 'Recurring'.

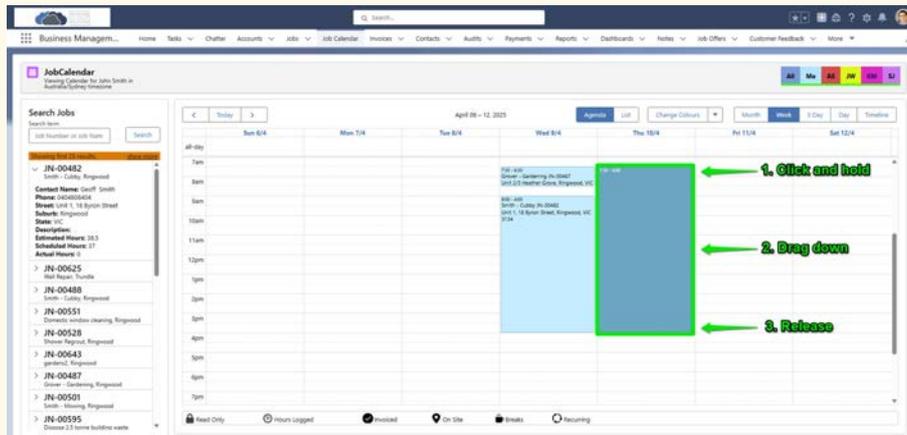
3. Now drag the job to the calendar in order to schedule it.



Alternatives

On a computer

Simply mark out the location on the calendar (click, hold + drag) and release the mouse button in order to schedule the currently unfurled job.



On a tablet

Tap + hold (for a few seconds). A 30 minute appointment will be created starting at the time you tapped, and will immediately open the **Event Details** dialog. Adjust the **End Time** to set the length of the appointment.

4. Select the person to perform the work. Review the remainder of the pre-filled information. When you are satisfied, press **Save**.

Event Details

Assign To: Me AS JW KM SJ

Job: JN-00482 X Location: Unit 1, 18 Byron Street, Ringwood, VIC 3134

*Subject: Smith - Cubby JN-00482 Type: Doing the Job 1

Start Date Time: 10/04/2025 7:30 am End Date Time: 10/04/2025 4:00 pm

Description: **Cubby House**
Job Description
Assemble and install a custom designed tree house.
• Design
• Construction
• Installation
• Painting and finishing.

Repeat: Reminder: 2

Cancel Save & View Job Save



If the event Type is Doing the Job, Site Visit, or Materials Purchase and no Location has been provided, 'No Location Set' will be displayed beneath the Subject on the event.

5. Job Schedule displays the new appointment.

Business Management... Home Tasks Chatter Accounts Jobs Job Calendar Invoices Contacts Audits Payments Reports Dashboards Notes Job Offers Customer Feedback More

JobCalendar
Viewing Calendar for John Smith in Australia/Sydney timezone

Search Jobs
Job Number or Job Name Search

all-day
7am
8am
9am
10am
11am
12pm
1pm
2pm
3pm
4pm
5pm
6pm
7pm

Apr 06 - 12, 2025

Agenda List Change Colours Month Week 3 Day Day Timeline

Sun 6/4 Mon 7/4 Tue 8/4 Wed 9/4 Thu 10/4 Fri 11/4 Sat 12/4

7:30 - 4:00
Smith - Cubby JN-00482
Unit 1, 18 Byron Street, Ringwood, VIC 3134

7:30 - 4:00
Smith - Cubby JN-00482
Unit 1, 18 Byron Street, Ringwood, VIC 3134

7:30 - 4:00
Smith - Cubby JN-00482
Unit 1, 18 Byron Street, Ringwood, VIC 3134

Read Only Hours Logged Invoiced On Site Breaks Recurring

6. Now repeat these actions until the job is fully scheduled.



A job is considered "fully scheduled" when the number of hours for which it is scheduled meets or exceeds the number of planned hours.

To schedule a second job

1. If in the same session on Job Calendar you want to schedule a second job, simply click on another job in the Search Job pane. Once it is open, you are free to begin scheduling.

The screenshot shows the JobCalendar interface. On the left, the 'Search Jobs' pane lists several jobs. One job, JN-00528, is highlighted with a green box and the text 'When a job is open...'. On the right, a calendar grid for April 6-12, 2025, shows a job scheduled for Tuesday, April 8th, from 8:00 am to 3:00 pm. A green arrow points from the search list to this job with the text 'Click'. Another green arrow points to the calendar grid with the text 'You can schedule it.'



If you want to view the job after saving changes to the event, click the **Save & View Job** button.

Alternatively, to return to the initial job you came from, click the event linked to that job, and press the **View**  button.

The screenshot shows the 'Event Details' form. At the top, there is a navigation bar with 'Assign To' and a dropdown menu showing 'Me', 'AS', 'JW', 'KM', and 'SI'. The form contains fields for Job ID (JN-00482), Location (Unit 1, 18 Byron Street, Ringwood, VIC 3134), Subject (Smith - Cubby JN-00482), Start Date Time (08/04/2025, 8:00 am), and End Date Time (08/04/2025, 3:00 pm). Below these fields is a description area with a rich text editor. At the bottom of the form, there are buttons for 'Delete', 'Cancel', 'Details', 'Clone', 'Save & View Job', and 'Save'. A green arrow points to the 'View' button (eye icon) next to the job ID, and another green arrow points to the 'Save & View Job' button.

How to schedule an appointment for multiple resources

Some jobs require more than one resource to complete the job. Where multiple resources are required for only part of the job, you will want to schedule the job for the primary resource, and then create a secondary appointment for the portion of the job requiring multiple resources.

Where multiple resources are required for the entire job, you can create all the required appointments from a single event.

To schedule a job for multiple resources

1. To create your first appointment, follow the instructions in “How to schedule a new appointment” on page cxcviii. (Stop before you click **Save**.) Your Event Details dialog will look something like this.

The screenshot shows the 'Event Details' dialog box. At the top right, the 'Assign To:' dropdown menu is open, and 'Me' is selected and highlighted in green. Other options in the menu are AS, JW, KM, and SJ. The main form contains the following fields: Job (JN-00501), Location (Unit 1, 18 Byron Street, Ringwood, VIC 3134), Subject (Smith - Mowing JN-00501), Type (Doing the Job), Start Date Time (08/04/2025, 8:30 am), and End Date Time (08/04/2025, 11:30 am). Below these is a rich text editor for the Description, which contains a heading 'Mowing' and two sections: 'Job Description' with bullet points 'Mow front and back' and 'Weeding', and 'Work Order Description' with a bullet point 'Dog in backyard'. At the bottom left, there are 'Repeat' and 'Reminder' toggle switches, both currently turned off. At the bottom right, there are three buttons: 'Cancel', 'Save & View Job', and 'Save'.

2. If you are not one of the resources who will do the job, click on **Me** to deselect yourself.

This screenshot is identical to the one above, but with a green arrow pointing to the 'Me' option in the 'Assign To:' dropdown menu, indicating the step to click on 'Me' to deselect yourself.

3. Click on each resource you want assigned to this appointment.

Event Details

Assign To: Me AS JW KM SJ

Job: JN-00501

Location: Unit 1, 18 Byron Street, Ringwood, VIC 3134

* Subject: Smith - Mowing JN-00501

Type: Doing the Job

Start Date Time: 08/04/2025 8:30 am

End Date Time: 08/04/2025 11:30 am

Description: Mowing
Job Description: Mow front and back, Weeding
Work Order Description: Dog in backyard.

Repeat: Reminder:

Cancel Save & View Job Save

4. When complete, press Save.

Event Details

Assign To: Me AS JW KM SJ

Job: JN-00501

Location: Unit 1, 18 Byron Street, Ringwood, VIC 3134

* Subject: Smith - Mowing JN-00501

Type: Doing the Job

Start Date Time: 08/04/2025 8:30 am

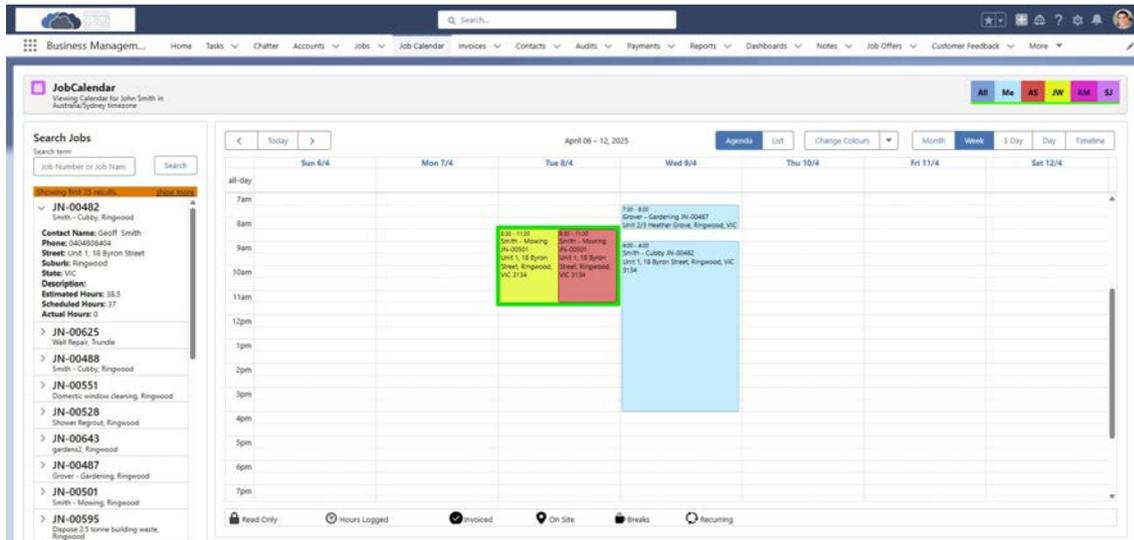
End Date Time: 08/04/2025 11:30 am

Description: Mowing
Job Description: Mow front and back, Weeding
Work Order Description: Dog in backyard.

Repeat: Reminder:

Cancel Save & View Job Save

5. The appointments are now displayed on the Job Calendar.



You can set the calendar color for each person. See “How to change calendar colours” on page cxcvii.

How to schedule appointments across multiple days

Your business might have quite a few jobs that take more than one day to complete. If that’s the case, you’ll be delighted to know that Business Management allows you to schedule many days of activity from a single event.



Repeating jobs create an event series assigned to a single resource. If you need a series of appointments attended by multiple resources, simply create one repeating event series per resource.

To schedule appointments across multiple days

1. To create your first appointment, follow the instructions in “How to schedule a new appointment” on page cxviii. (Stop before you click **Save**.) Your Event Details dialog will look something like this.

Event Details

Assign To: Me AS JW KM SJ

Job: JN-00457 Location: 12 Byron St, Ringwood, VIC 3134

* Subject: Hardy - Rear Patio JN-00457 Type: Doing the Job

Start Date Time: 14/04/2025 8:00 am End Date Time: 14/04/2025 12:00 pm

Description: Construct Rear Patio

Repeat: Reminder:

Cancel Save & View Job Save



This dialog is set to create a single four-hour appointment on the morning of the first day of a construction project. This particular job is expected to take around two weeks to complete.

With the events in place to specify a single morning’s work, now you will want to repeat the appointment to “fill” each morning of the desired duration.

2. To repeat the appointment, press the **Repeat** button.

Event Details

Assign To: Me AS JW KM SJ

Job: JN-00457 Location: 12 Byron St, Ringwood, VIC 3134

* Subject: Hardy - Rear Patio JN-00457 Type: Doing the Job

Start Date Time: 14/04/2025 8:00 am End Date Time: 14/04/2025 12:00 pm

Description: Construct Rear Patio

Repeat: Reminder:

Cancel Save & View Job Save

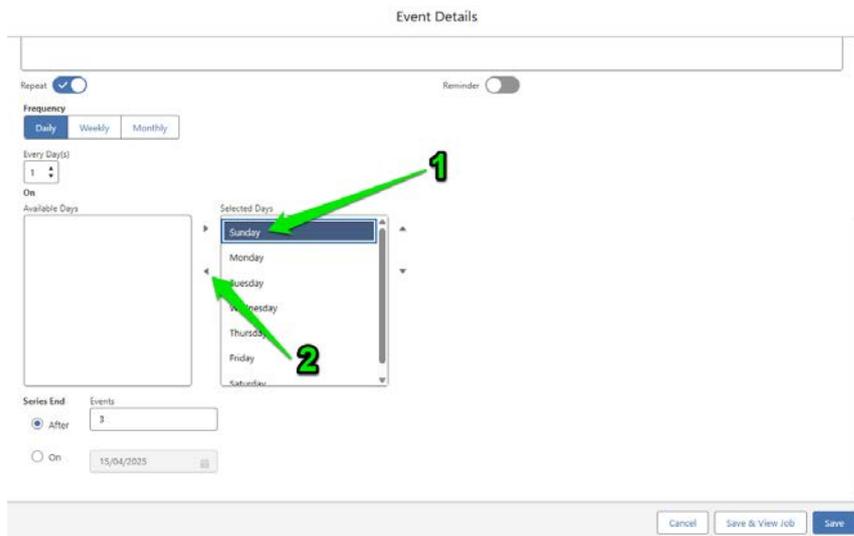
3. The Repeat pane opens.

The screenshot shows the 'Event Details' form. At the top right, there is an 'Assign To' dropdown menu with options: Me, AS, JW, KM, SJ. The 'Job' field contains 'JN-00457' and the 'Location' field contains '12 Byron St, Ringwood, VIC 3134'. The 'Subject' field contains 'Hardy - Rear Patio JN-00457' and the 'Type' dropdown is set to 'Doing the Job'. The 'Start Date Time' is '14/04/2025 8:00 am' and the 'End Date Time' is '14/04/2025 12:00 pm'. The 'Description' field contains 'Construct Rear Patio'. The 'Repeat' section is expanded, showing a checked 'Repeat' toggle and a disabled 'Reminder' toggle. Under 'Frequency', 'Daily' is selected. 'Every Day(s)' is set to '1'. The 'On' section shows 'Available Days' and 'Selected Days' fields.

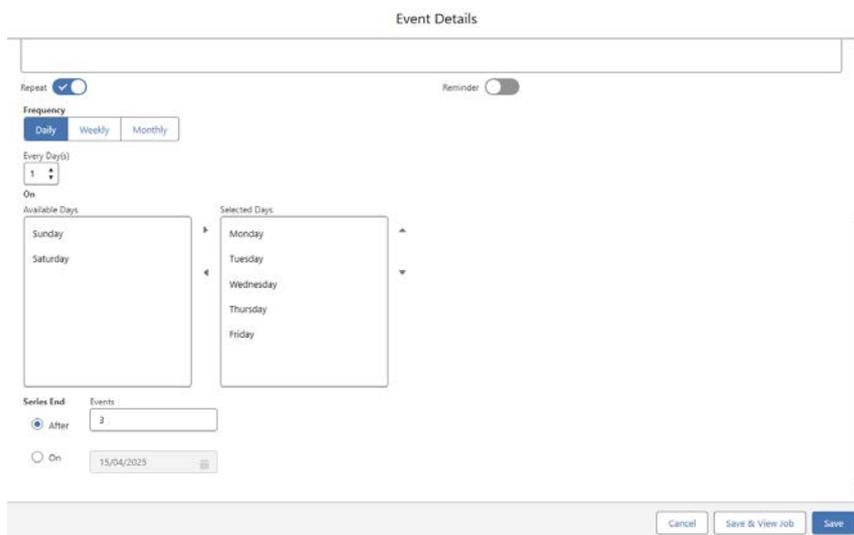
4. Scroll down to see the all of the Repeat pane.

This screenshot shows the 'Repeat' section of the 'Event Details' form with the 'Selected Days' list expanded. The 'Repeat' toggle is checked and the 'Reminder' toggle is disabled. 'Daily' is selected under 'Frequency', and 'Every Day(s)' is set to '1'. The 'Available Days' list is empty, and the 'Selected Days' list contains: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. The 'Series End' section has 'After' selected with a value of '3', and 'On' is unselected with a date of '15/04/2025'.

5. Now remove from **Selected Days** any days our resources won't be working.
- a. Click on a day in the **Selected Days** list then click the arrow to deselect it.



- b. Now do this for each other day your resources will not be working. The dialog will look something like this.



6.  Because our resources will not be working on Saturday or Sunday, we remove Saturday and Sunday from the **Selected Days** list.

7. Now enter the number of days our resources will be working into the **Series End, After Events** field.

The screenshot shows the 'Event Details' form. At the top, there is a 'Repeat' checkbox (checked) and a 'Reminder' toggle (unchecked). Below this is the 'Frequency' section with 'Daily', 'Weekly', and 'Monthly' tabs. The 'Daily' tab is selected, and the 'Every Day(s)' field is set to '1'. The 'On' section has two panes: 'Available Days' (containing Sunday and Saturday) and 'Selected Days' (containing Monday, Tuesday, Wednesday, Thursday, and Friday). In the 'Series End' section, the 'After' radio button is selected, and the 'Events' field contains the number '10', which is highlighted by a green arrow. The 'On' radio button is unselected, and its date field shows '15/04/2025'. At the bottom right, there are 'Cancel', 'Save & View Job', and 'Save' buttons.



Or we could have chosen the final date of work.

This screenshot shows the same 'Event Details' form as above, but with the 'On' radio button selected in the 'Series End' section. The date field next to it now contains '25/04/2025', which is highlighted by a green arrow. The 'Events' field is now empty. All other settings, including the frequency and selected days, remain the same as in the previous screenshot.

8. Now press Save.

Event Details

Repeat Reminder

Frequency

Daily Weekly Monthly

Every Day(s)

1

On

Available Days

Sunday
Saturday

Selected Days

Monday
Tuesday
Wednesday
Thursday
Friday

Series End

Events

After 10

On 25/04/2025

Cancel Save & View Jobs Save

9. The Job Calendar now shows all the repeated appointments in the period we have specified.

Business Management... Home Tasks Chatter Accounts Jobs Job Calendar Invoices Contacts Audits Payments Reports Dashboards Notes Job Offers Customer Feedback More

JobCalendar

Viewing Calendar for John Smith in Australia/Sydney timezone

Search Jobs

Showing first 25 results. Show more

JN-00482 Smith - Cubby, Ringwood

JN-00625 Wall Repair, Trundle

JN-00488 Smith - Cubby, Ringwood

JN-00551 Domestic window cleaning, Ringwood

JN-00528 Shower Repair, Ringwood

JN-00643 garden2, Ringwood

JN-00487 Gutter - Guttering, Ringwood

JN-00501 Smith - Moving, Ringwood

JN-00595 Dispose 2.5 tonne building waste, Ringwood

JN-00563 Ringwood

JN-00633 Barter - Rubbish removal, Ringwood

JN-00527 Shower Waterproofing, Ringwood

April 13 - 19, 2025

Agenda List Change Colours

Month Week 3 Day Day Timeline

all-day

7am

8am

9am

10am

11am

12pm

1pm

2pm

3pm

4pm

5pm

6pm

7pm

Read Only Hours Logged Invoiced On Site Breaks Recurring



In this example, the franchisee would create another series of repeating appointments to fill in the afternoon work. Morning and afternoon appointments are entered separately because this particular franchisee has chosen to allow for lunch breaks within the calendar.

How to schedule repeating appointments

Some customers will want you to deliver services on a regular schedule.



If your business delivers lawn mowing or gardening services, your customer may wish for you to visit every month.

Business Management has the ability for you to set a regular series of visits far into the future. You can set

- » visits on a set number of weeks
- » visits on a set date of a month
- » visits on a set day of the week for a given week of the month



Repeating jobs create an event series assigned to a single resource. If you need a series of appointments attended by multiple resources, simply create one repeating event series per resource.

To set a repeating schedule every N weeks

1. To create your first appointment, follow the instructions in “How to schedule a new appointment” on page cxviii. (Stop before you click **Save**.) Your Event Details dialog will look something like this.

Event Details

Assign To: Me AS JW **SJ**

Job JN-00456	Location 8 Byron St, Ringwood, VIC
* Subject Mowing, Jones JN-00456	Type --None--
* Start Date Time Date: 06/12/2019 Time: 9:00 AM	* End Date Time Date: 06/12/2019 Time: 10:30 AM
Description Salesforce Sans 12 B I U S Mowing front and rear lawns	
Repeat <input type="checkbox"/>	Reminder <input type="checkbox"/>

Cancel Save

2. To set up the repeating series, press the **Repeat** button, then choose the **Weekly** option.

Event Details

Assign To: Me AS JW SJ

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

*Subject: Mowing, Jones JN-00456 Type: --None--

*Start Date Time: 06/12/2019 9:00 AM *End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Reminder:

Frequency: Daily Weekly Monthly

Every Week(s): 1

Series End: After 3

On: 07/12/2019

Cancel Save

3. Now choose the interval between each visit. In this example, we're going to set it for every three weeks.

Event Details

Assign To: Me AS JW SJ

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

*Subject: Mowing, Jones JN-00456 Type: --None--

*Start Date Time: 06/12/2019 9:00 AM *End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Reminder:

Frequency: Daily Weekly Monthly

Every: 3

Series End: After 3

On: 07/12/2019

Cancel Save

- Now select when the series will end. You can choose for the series to end after a set number of visits OR to finish on a particular date. In this case, we're going to choose for the series to end on a particular date. Press **Save** when you're done.

Event Details

Assign To: Me AS JW SJ

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

* Subject: Mowing, Jones JN-00456 Type: --None--

* Start Date Time: 06/12/2019 9:00 AM * End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Reminder:

Frequency: Daily Weekly Monthly

Every Week(s): 3

Series End: Events: 3

After On: 30/06/2020

Cancel Save

To set a repeating schedule every N months

- To create your first appointment, follow the instructions in “How to schedule a new appointment” on page cxcviii. (Stop before you click **Save**.) Your Event Details dialog will look something like this.

Event Details

Assign To: Me AS JW SJ

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

* Subject: Mowing, Jones JN-00456 Type: --None--

* Start Date Time: 06/12/2019 9:00 AM * End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Reminder:

Frequency: Daily Weekly Monthly

Every Week(s): 3

Series End: Events: 3

After On

Cancel Save

- To set up the repeating series, press the **Repeat** button, then choose the **Monthly** option.

Event Details

Assign To: Me AS JW SJ

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

*Subject: Mowing, Jones JN-00456 Type: --None--

*Start Date Time: 06/12/2019 9:00 AM *End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Reminder:

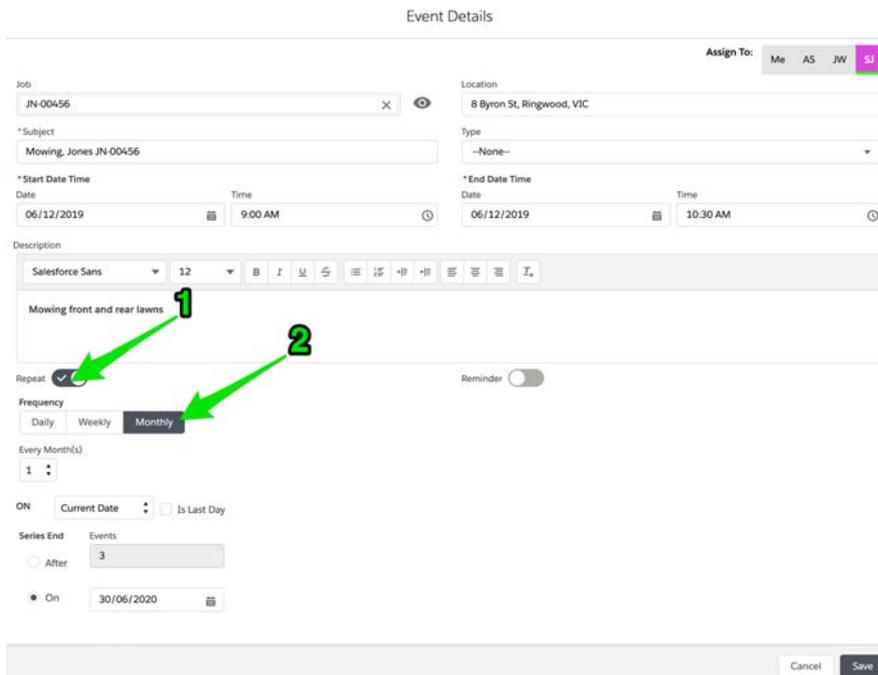
Frequency: Daily Weekly Monthly

Every Month(s): 1

ON: Current Date Is Last Day

Series End: After 3 On 30/06/2020

Cancel Save



- Choose your monthly interval. Let's decide to visit every second month.

Event Details

Assign To: Me AS JW SJ

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

*Subject: Mowing, Jones JN-00456 Type: --None--

*Start Date Time: 06/12/2019 9:00 AM *End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Reminder:

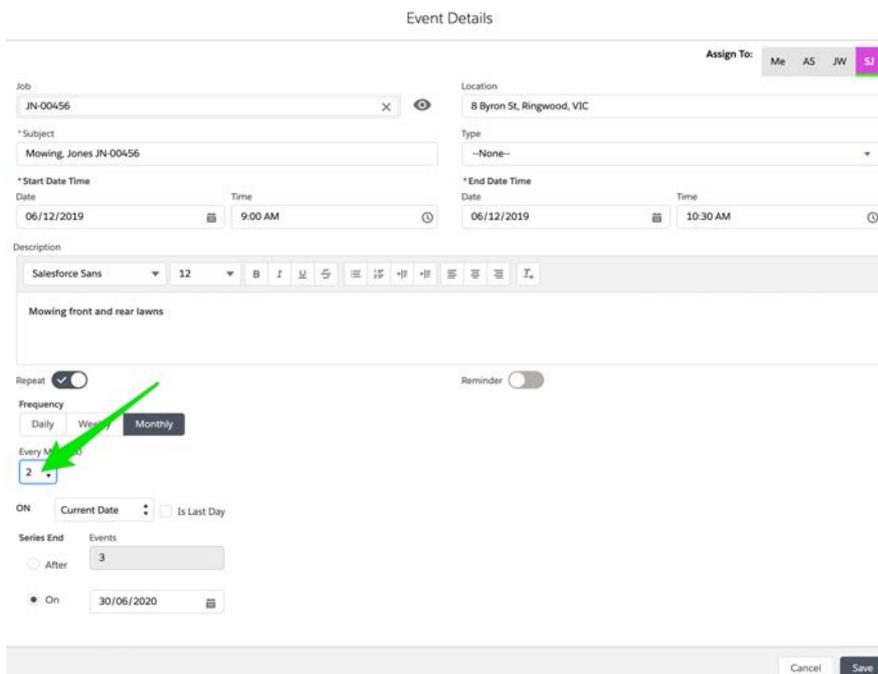
Frequency: Daily Weekly Monthly

Every Month(s): 2

ON: Current Date Is Last Day

Series End: After 3 On 30/06/2020

Cancel Save



4. We could choose to visit the same date each month. But a fixed date will sometimes fall on a weekend, and that may not be suitable. Let's choose to visit the first Friday of each month. To do that, change the **ON** Current Date to **ON** Every. Then select the week of the month, then the day of the week.

Event Details

Assign To: Me AS JW SJ

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

*Subject: Mowing, Jones JN-00456 Type: --None--

*Start Date Time: 06/12/2019 9:00 AM *End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Frequency: Monthly (1) Every Month(s): 2 (2) ON: Every (1) First (2) Friday (3)

Series End: After 3 (3) On: 30/06/2020

Cancel Save

5. Choose when the series will end. When you're finished, press **Save**.

Event Details

Assign To: Me AS JW SJ

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

*Subject: Mowing, Jones JN-00456 Type: --None--

*Start Date Time: 06/12/2019 9:00 AM *End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Frequency: Monthly (1) Every Month(s): 2 (2) ON: Every (1) First (2) Friday (3)

Series End: After 10 (1) On: 30/06/2020 (2)

Cancel Save



More ideas for scheduling

Using the patterns above, you can choose to visit

- » On the first date of the month
- » On the last date of the month
- » On the first, second, third, or fourth week of the month
- » On the last week of the month
- » On a named day of a chosen week of the month

Repeating events gives you a lot of flexibility!



How to use repeating appointments in your business

When you agree to deliver a service at regular intervals, you will create the repeating pattern based on a particular **Job**. When you do this, you will want to mark the **Job** as a *Repeating Job*.

When you have marked a *Repeating Job*, you can invoice the job repeatedly, producing a series of invoices against the one **Job**. If the **Job Plan** changes over time, you can modify it as it changes. Each new invoice will reflect changes in the **Job Plan**.

How to set appointment reminders

Most businesses now send friendly messages to customers to remind them of their upcoming visit. Business Management has the ability to send SMS messages to customers and your own assigned resources.

To send SMS reminders

1. From the **Event Details** dialog, press the **Reminder** button.

Event Details

Assign To: Me AS JW **SJ**

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

* Subject: Mowing, Jones JN-00456 Type: Doing the Job

* Start Date Time: 06/12/2019 9:00 AM * End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Reminder 

Frequency: Daily Weekly **Monthly**

Every Month(s): 1

ON: Every Last Friday

Series End: After 6

On 07/12/2019

Cancel Save

2. Now choose to either **Remind Customer**, **Remind Assignee**, or both.

Event Details

Assign To: Me AS JW **SJ**

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

* Subject: Mowing, Jones JN-00456 Type: Doing the Job

* Start Date Time: 06/12/2019 9:00 AM * End Date Time: 06/12/2019 10:30 AM

Description: Mowing front and rear lawns

Repeat: Reminder Remind Customer Remind Assignee

Frequency: Daily Weekly **Monthly**

Every Month(s): 1

ON: Every Last Friday

Series End: After 6

On 07/12/2019

1 2

Cancel Save

3. Reminders will now be scheduled to send.



There is one extra step when the appointment is part of a series of repeating events, See “How to adjust appointments in a repeating series” on page ccxxx.



If you happen to change the appointment, the scheduled reminders will be updated with the changes to the appointment.

Who reminders are sent to

Customer Reminders are sent to the number from the **Job** *Mobile* field.

Assignee Reminders are sent to the number from the **User** *Mobile* field.

What times are reported

Times are localized based on the timezones of the Territory and Assignee.



Customer Time

Customer Reminders report the time of the appointment in the Territory’s timezone. When the Job is not associated with a Territory, the Customer Reminder reports the time of the appointment in the Assignee’s timezone.



Assignee Time

Assignee Reminders always report the time of the appointment in the Assignee’s timezone, even if the Job is in a different timezone.

This means that a Customer Reminder may report a 10:00 am appointment start, while the Assignee Reminder may report a 9:00 am appointment start if the Assignee’s timezone is one hour different from the timezone of the Territory in which the Job is located.

When reminders are sent

You can expect customer and assignee reminders to be sent as follows

- » Customer reminders – 24 hours before the event
- » Assignee reminders – 1 hour before the event

There are several exceptions to the above timings

- » SMS publishing window
- » reminder blackout period
- » appointments set in the past

Each of these exceptions is explained below.

SMS publishing window

There is a system-wide calendar which defines when reminders may be sent. Franchisees do not have control over this calendar; only system administrators do. Your system administrator will have defined

- » the earliest time in a day a reminder may be sent
- » the latest time in a day a reminder may be sent
- » on which days of the week reminders may be sent

If the reminder is scheduled to send outside the SMS publishing window, it will reschedule the reminder to be sent during an earlier publishing window.



Timezone

The timezone used for the SMS publishing window is

- » the timezone of the territory in which the job is located, OR
- » the timezone of the assignee (when the job is not assigned to a territory)

Reminder blackout period

There is a reminder blackout period that applies to customer reminders (but not assignee reminders).

If the appointment would have generated a reminder that falls within the next 12 hours from now, no reminder will be sent.



Why the blackout period?

We assume that if you're only just now booking in an appointment for tomorrow, that you will have spoken with the customer just now and therefore not need to remind them of the appointment.

Appointments set in the past

Reminders are not sent for any appointments created for a past date or time.

Example scenarios

Scenario	The reminder will be sent	Why
An assignee is scheduled a reminder for the first appointment of a day, which happens to be before the first reminder of the day may be sent	In the last minute of the previous day's reminder period	The system calculates that the reminder ought to be sent outside the publishing window, so it finds the next earlier publishing window in which to send the reminder
A customer's appointment starts at 8:00 am Monday morning and your system has been set to not send appointments on weekends	In the last minute of the Friday's reminder period	The system calculates that the reminder ought to be sent outside the publishing window, so it finds the next earlier publishing window in which to send the reminder
A customer's appointment starts at 8:00 am Tuesday morning, the SMS publishing window opens at 8:30 am, and your system has been set to not send appointments on weekends	In the last minute of the Friday's reminder period	The system calculates that the reminder ought to be sent outside the publishing window, so it finds the next earlier publishing window in which to send the reminder
It is 9:30 am Monday morning and you make an appointment for a customer 4:00 pm Tuesday	No customer reminder will be sent	The system calculates the reminder ought to be sent at 4:00 pm Monday, but that time is within the reminder blackout period
It is 10:20 am Friday, and you assign a resource to begin an appointment at 10:00 am Friday	No assignee reminder will be sent	Reminders for appointments in the past are not sent

How to schedule non-job appointments

You may wish to create a variety of appointments on the calendar that don't relate to any particular job.

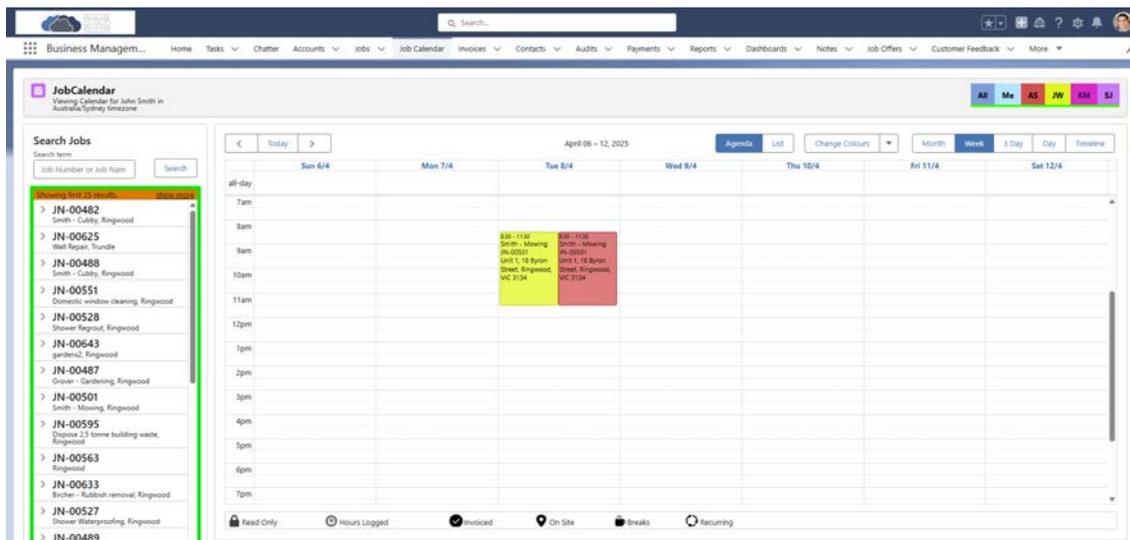
- ✓ Non-job appointments can include
 - » Private appointments
 - » Personal leave
 - » Annual holidays
 - » Lunch breaks

How you create your non-job appointments depends on whether they are standalone or repeating

- » Standalone appointments can be created on either the Job Calendar or the Calendar.
- » Repeating appointments must be created on the Calendar.

To add a standalone non-job appointment

1. On the Job Calendar, ensure all Jobs in the Search Job pane is closed.



The screenshot displays the 'JobCalendar' interface for 'John Smith in Australia/Sydney timezone'. The top navigation bar includes 'Business Management', 'Home', 'Tasks', 'Chatter', 'Accounts', 'Jobs', 'Job Calendar', 'Invoices', 'Contacts', 'Audits', 'Payments', 'Reports', 'Dashboards', 'Notes', 'Job Offers', 'Customer Feedback', and 'More'. The main area is divided into two panes. On the left, the 'Search Jobs' pane shows a list of 13 jobs, with the first job 'JN-00482 Smith - Cubby, Ringwood' highlighted in green. On the right, the calendar grid shows the week of April 6-12, 2025. The grid has columns for each day and rows for time slots from 7am to 7pm. Two appointments are visible on Tuesday, April 8th: a yellow one from 11am to 11:30am and a red one from 11:30am to 12pm. The bottom of the calendar grid has icons for 'Read Only', 'Hours Logged', 'Invoiced', 'On Site', 'Breaks', and 'Recurring'.

2. Now click on any empty location in the calendar. The event dialog box will appear.

Event Details
WARNING: This event is not related to a Job.

Assign To: Me AS JW KM SJ

Job:

Location:

* Subject:

Start Date Time: *Date: 10/04/2025 *Time: 9:00 am

End Date Time: *Date: 10/04/2025 *Time: 9:30 am

Description:

Reminder:

Cancel Save

3. Complete the Event dialog box then press Save.

Event Details
WARNING: This event is not related to a Job.

Assign To: Me AS JW KM SJ

Job: 1

Location: 2

* Subject: Private appointment 3

Start Date Time: *Date: 10/04/2025 *Time: 9:00 am

End Date Time: *Date: 10/04/2025 *Time: 11:00 am

Description:

Reminder:

Cancel Save 4

4. The appointment (not related to any job) is now placed on the Job Calendar.

Business Management... Home Tasks Chatter Accounts Jobs Job Calendar Invoices Contacts Audits Payments Reports Dashboards Notes Job Offers Customer Feedback More

JobCalendar
Viewing Calendar for John Smith in Australia/Sydney timezone

Search Jobs
Job Number or Job Name Search

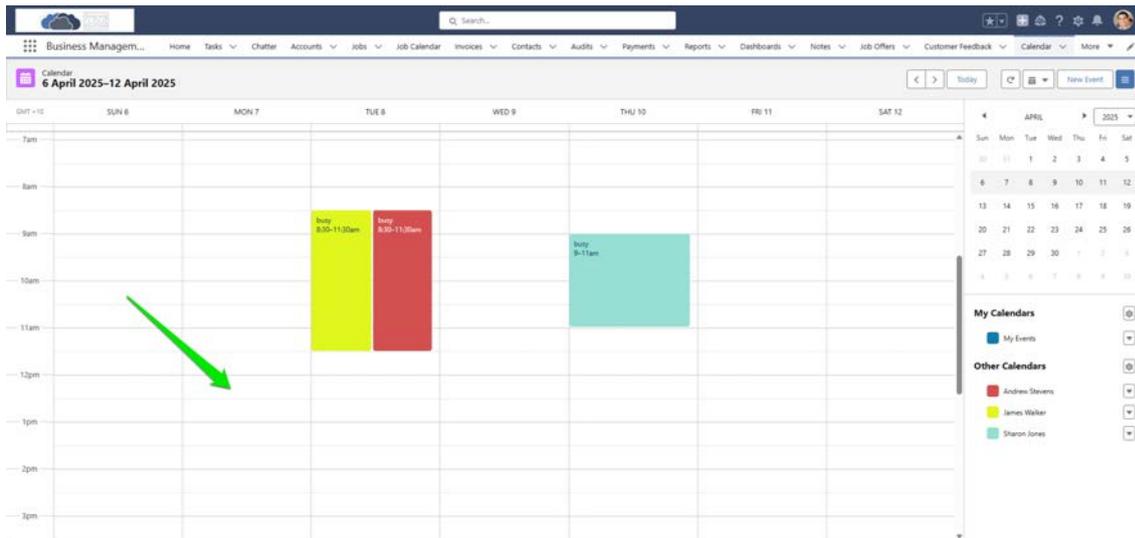
all-day

Sun 6/4	Mon 7/4	Tue 8/4	Wed 9/4	Thu 10/4	Fri 11/4	Sat 12/4
		8:00-11:00 Smith - Moving (R-2025) Unit 1, 10 Byron Street, Ringwood, VIC 3134	8:00-11:00 Smith - Moving (R-2025) Unit 1, 10 Byron Street, Ringwood, VIC 3134	9:00-11:00 Smith - Moving (R-2025) Unit 1, 10 Byron Street, Ringwood, VIC 3134	9:00-11:00 Private appointment	

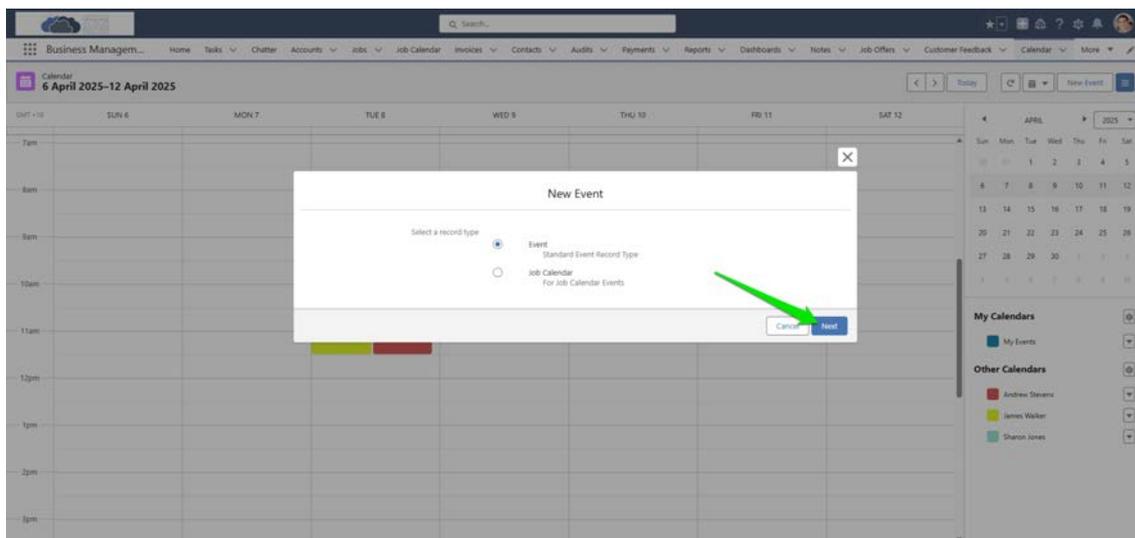
Read Only Hours Logged Invoiced On Site Breaks Recurring

To add a repeating series of non-job appointments

1. On the Calendar, click on any empty location.



2. The New Event dialog asks you to select which Event type is to be created. Ensure it is the Event type and click Next.



3. The Event Details box will appear.

New Event: Event * = Required information

Calendar Details

*Assigned To: John Smith | Related To: Search Accounts...

*Subject: | Name: Search Contacts...

All-Day Event: | Private:
⚠ Your private event details are also visible to your Salesforce admin and users with the View All Data permission. For more information, contact your Salesforce admin.

Start: *Date: 07/04/2025 | *Time: 12:00 pm | Actual Start: Date: | Time: |

End: *Date: 07/04/2025 | *Time: 1:00 pm | Actual End: Date: | Time: |

Show Time As: Busy | Type: --None--

*Activity Currency: AUD - Australian Dollar | Repeat:

Other Information

Cancel Save & New Save

4. Adjust the details as you need, then choose Type and Repeat.

New Event: Event * = Required information

Calendar Details

*Assigned To: John Smith | Related To: Search Accounts...

*Subject: **1** Lunch Break | Name: Search Contacts...

All-Day Event: | Private:
⚠ Your private event details are also visible to your Salesforce admin and users with the View All Data permission. For more information, contact your Salesforce admin.

Start: *Date: 07/04/2025 | *Time: 12:00 pm | Actual Start: Date: | Time: |

End: *Date: 07/04/2025 | *Time: **2** 12:45 pm | Actual End: Date: | Time: |

Show Time As: Busy | Type: **3** Lunch Break

*Activity Currency: AUD - Australian Dollar | Repeat: **4** | Frequency: Daily | Weekly | Monthly | Yearly

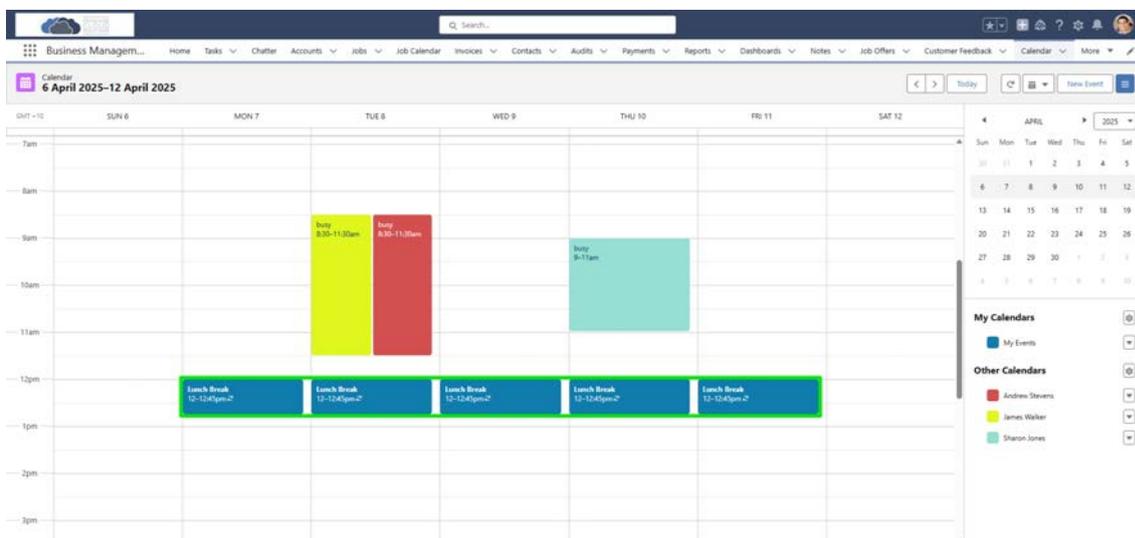
Cancel Save & New Save

5. Now specify the Frequency and End Date for the series. Press Save when you're done.

The screenshot shows a configuration form for an appointment series. The form includes the following fields and options:

- Show Time As: Busy
- Type: Lunch Break
- * Activity Currency: AUD - Australian Dollar
- Repeat:
- Frequency: Weekly (highlighted with a green arrow and '1')
- Every Week
- On: M Tu W Th F Sa (highlighted with a green arrow and '2')
- Series End Date: None, After 365 Events (highlighted with a green arrow and '3'), On 07/07/2025
- Other Information: Location
- Description Information: Description (with a tip: Tip: Type Control + period to insert quick text. highlighted with a green arrow and '4')
- Buttons: Cancel, Save & New, Save

6. The appointment series is now placed on the Calendar.



This appointment series will also be visible in Job Calendar.

Adjusting appointments

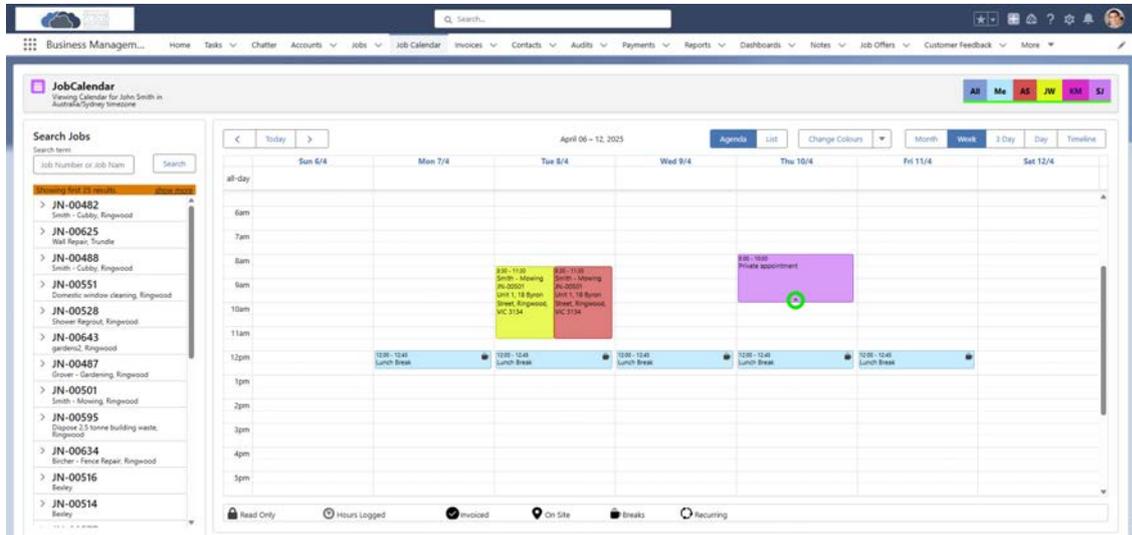
How to change the length of an appointment

When you drag a job onto the Job Calendar, it will automatically try to use as many hours from the job as will fit in your work day. You will sometimes choose to shorten the default length of the appointment.

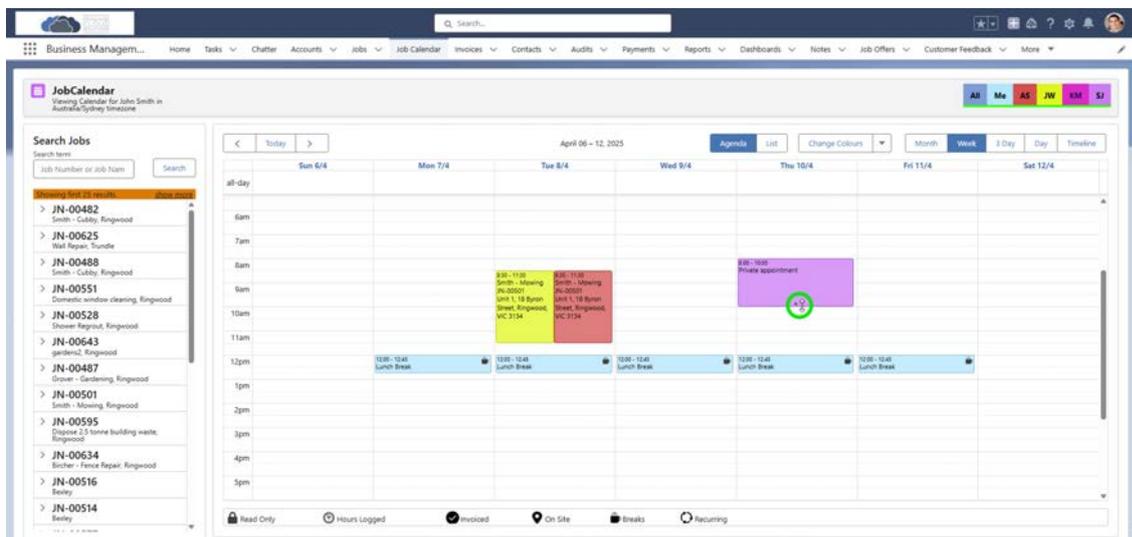
While you can do this within the Event dialog box, it is often quickest and easiest to shorten the length of an appointment by dragging and dropping the appointment on the calendar.

To change the length of an appointment on the calendar

1. Hover your mouse over the top of a calendar appointment. A grab handle will appear at the bottom of the appointment.



2. Hover your mouse over the grab handle until it turns into a downward-facing arrow.



3. Now press down using your left mouse button and drag the appointment to its new length.

The screenshot displays the JobCalendar application interface. At the top, there is a navigation menu with options like 'Business Management', 'Home', 'Tasks', 'Chatter', 'Accounts', 'Jobs', 'Job Calendar', 'Invoices', 'Contacts', 'Audits', 'Payments', 'Reports', 'Dashboards', 'Notes', 'Job Offers', 'Customer Feedback', and 'More'. Below this is a search bar and a user profile icon. The main area is titled 'JobCalendar' and shows a weekly calendar for 'April 06 - 12, 2025'. The calendar grid shows days from Sunday to Saturday. A search bar on the left lists various jobs with details like job numbers and descriptions. The calendar grid shows several appointments: a yellow one on Tuesday (8:30-11:30), a red one on Tuesday (8:30-11:30), a purple one on Thursday (8:00-10:00), and several blue lunch break appointments (12:00-12:45) on Monday through Friday. The interface also includes a 'Read Only' button and icons for 'Hours Logged', 'Invoiced', 'On Site', 'Breaks', and 'Recurring'.



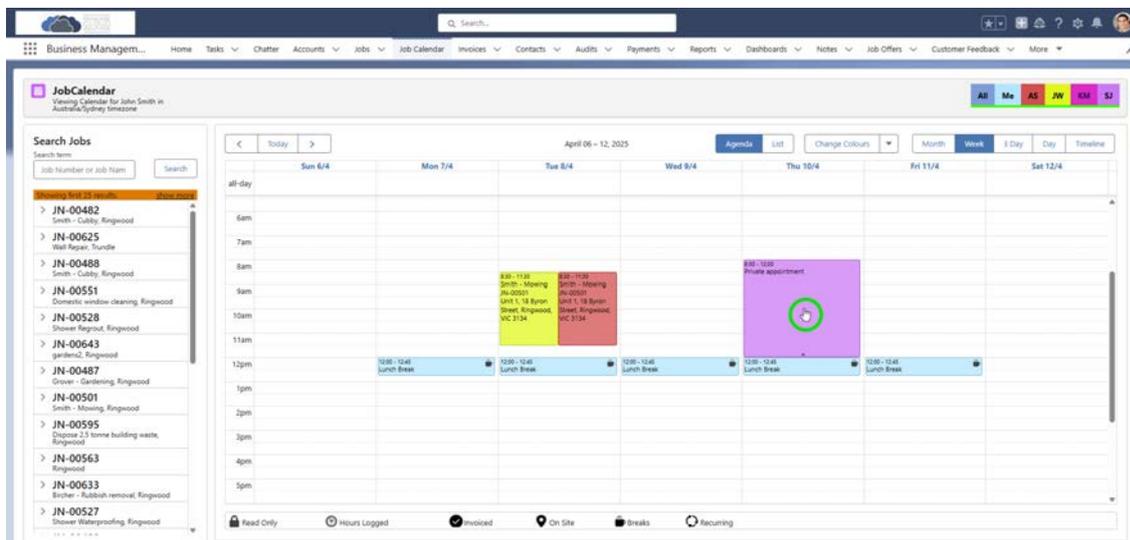
There is one extra step when the appointment is part of a series of repeating events, See “How to adjust appointments in a repeating series” on page ccxxx.

How to move an appointment

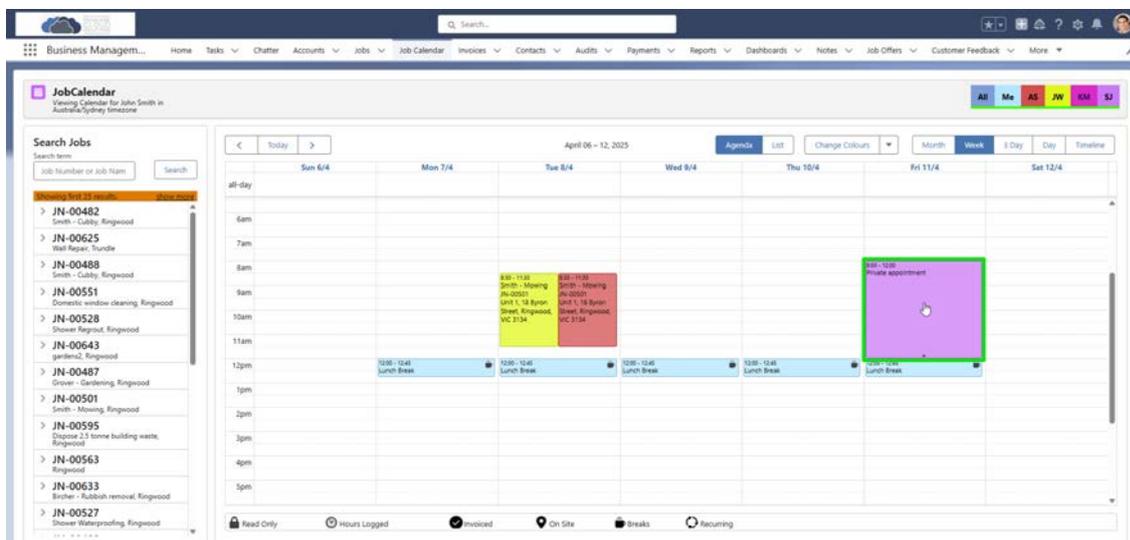
When an appointment is already on the calendar and you need to move it, doing so is as simple as drag and drop.

To move an appointment on the calendar

1. Hover your mouse over top of a calendar appointment. Your mouse pointer will turn into a hand.



2. Now press down and drag (left mouse button) the appointment to its new location. Release the mouse button.



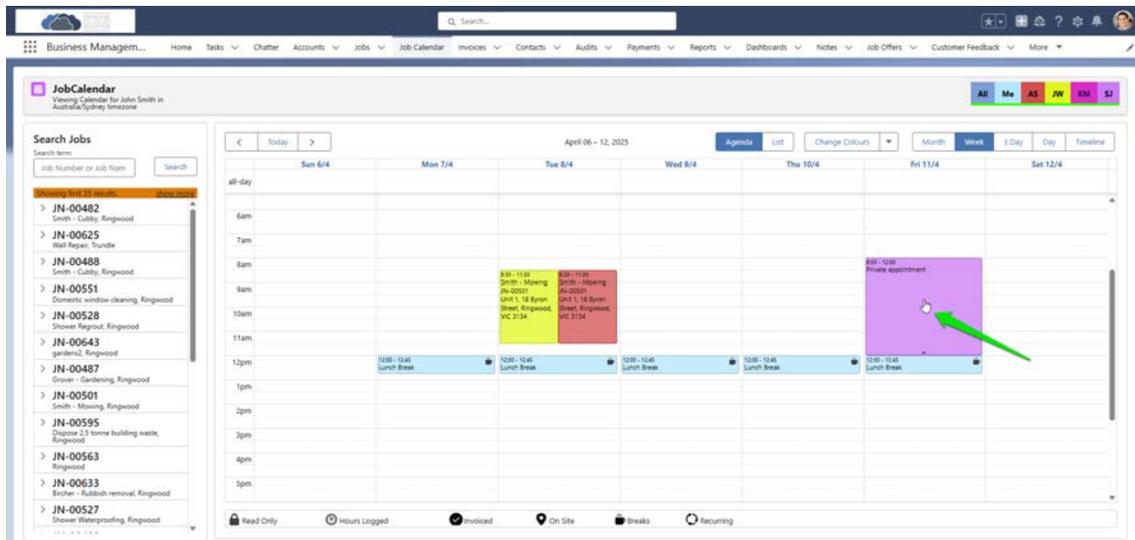
There is one extra step when the appointment is part of a series of repeating events, See “How to adjust appointments in a repeating series” on page ccxxx.

How to delete an appointment

Sometimes you need to remove an appointment from the calendar. Doing that is as simple as deleting the appointment.

To remove an appointment

1. Find the appointment in the Job Calendar and click on it.



The Event Details dialog opens.

2. Press the Delete button.

The 'Event Details' dialog box is shown. At the top, a red warning message states 'WARNING: This event is not related to a Job.' Below this, there are several input fields: 'Job', 'Location', 'Subject' (with 'Private appointment' entered), 'Start Date Time' (11/04/2025, 8:00 am), and 'End Date Time' (11/04/2025, 12:00 pm). There is also a 'Description' field and a 'Reminder' toggle switch. At the bottom, a row of buttons includes 'Delete', 'Cancel', 'Details', 'Clone', and 'Save'. A green arrow points to the 'Delete' button.

The event is now removed from the calendar.



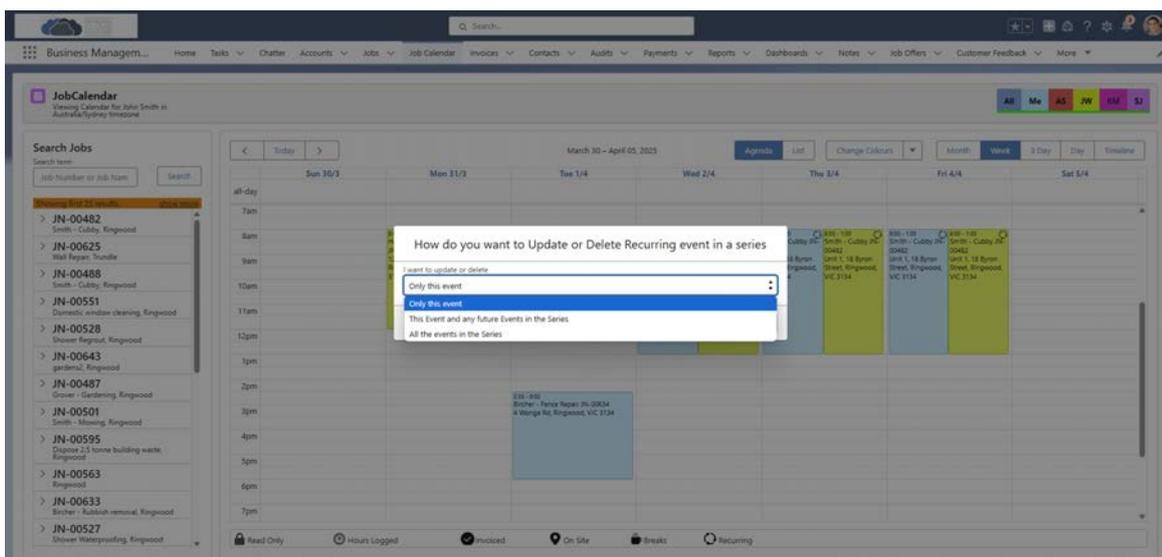
There is one extra step when the appointment is part of a series of repeating events, See “How to adjust appointments in a repeating series” on the facing page.

How to adjust appointments in a repeating series

When you are operating on an appointment belonging to a repeating series, you get to choose what part of the series the operation is applied to. This happens whenever you

- » Change the length of an appointment
- » Move an appointment
- » Delete an appointment
- » Add, remove or modify the resources assigned to the appointment
- » Add or remove reminders

Your choices are explained below.



I want to update or delete	What it does	What it means
Only this event	Applies the change to only the selected appointment.	This appointment is disconnected from the series. Any further changes to the series will not affect this appointment.
This event and any future events in the series	Applies the change to this event and any event that follows it in the calendar.	Breaks the series into two. Applies changes to this appointment and any future ones. Changes to appointments preceding this one will no longer affect the appointment series from this appointment onwards.

I want to update or delete	What it does	What it means
All the events in the series	Applies this change to this event and all the events in the series.	Applies the change to all events in the series, but not to any events that were already separated from the series through choosing 'only this event' or 'this event and any future events in the series'.

How to confirm a scheduled appointment with a customer



Salesforce does not provide the ability to send a meeting request to a customer using built-in Activity features.

To send a meeting invite or appointment confirmation, your options are

- » Send an email confirming the agreed details, or
- » Use an external calendaring application such as Google Calendar to send the meeting confirmation

Tracking job profitability

Business Management provides tools to enable job-level profitability tracking.

You determine the expected profit contribution and margins using the Job Planning tool. There you can input your expected cost and price for labor and materials. The system can then estimate the expected profitability of the job.

The screenshot displays the 'Business Management' software interface for job JN-00548. At the top, a navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', and 'More'. Below this, a summary row shows: Customer Name: Tim Alford, Est Labour Price: \$360.00, Est Material Price: \$300.00, Amount Inc Tax: \$660.00, Est Hours: 4.50, and Est Gross Margin: 32.95% (circled in green). The main content area is titled 'Fencing' and includes several summary panels:

- Job Tasks (2):** A table with columns NAME, DESCRIPTION, and TOTAL. It lists 'Site Visit' (Call out fee, \$40.00) and 'Doing the ...' (Fencing, \$320.00).
- Job Materials (2):** A table with columns DESCRIP..., QUANTITY, and TOTAL. It lists 'Cypress C...' (40.0, \$180.00) and 'Disposal fee' (1.0, \$120.00).
- Fencing Summary:** A table with columns Amount, Est Margin, Hours, Cost, Profit, and Total. It shows: Amount \$660.00, Est Margin 32.95%, Hours 4.5, Cost \$442.50, Profit \$217.50 (circled in green), and Total \$660.00.
- Labour Summary:** A table with columns Calculated, Cost, Amount, and Profit. It shows: Calculated Cost \$202.50, Amount \$360.00, Profit \$157.50.
- Material Summary:** A table with columns Calculated, Cost, Amount, and Profit. It shows: Calculated Cost \$240.00, Amount \$300.00, Profit \$60.00.

A more complete financial analysis of the expected profitability of the job is also available within the Job's **Financial Summary** tab.

Details

Job Allocation

Quotes/Invoices

Financial Summary

Feedback/Marketing

Financial Overview

Amount

\$660.0000

Amount Inc Tax

\$660.00

Tax Amount

\$0.0000

Tax Rate

Estimates vs Actuals

Estimated Gross Profit

\$217.50

Actual Gross Profit

\$275.45

Estimated Gross Margin

32.95%

Actual Gross Margin

41.74%

Estimated Hours

4.50

Actual Scheduled Hours

4.50

Estimated Labour Cost

\$202.5000

Actual Hours

4.00

Estimated Labour Price

\$360.00

Actual Labour Price

180.00

Estimated Labour Profit

\$157.50

Actual Labour Profit

\$180.00

Estimated Material Cost

240.00

Actual Hourly Material Cost

\$68.86

Estimated Material Price

\$300.00

Actual Material Price

\$204.55

Estimated Material Profit

\$60.00

Actual Material Profit

\$95.45

Estimated COGS Value

\$442.50

Actual COGS Value

\$384.55

Estimated COGS Ratio

67.05%

Actual COGS Ratio

58.26%

Business Management continues to track the profitability of the job when work gets underway. When franchisees or their employees enter materials purchases or labor expenditure, the system tracks these actual expenses against the job.

Financial Overview

Amount		Amount Inc Tax
\$660.0000		\$660.00
Tax Amount		Tax Rate
\$0.0000		

Estimates vs Actuals

Estimated Gross Profit	\$217.50	Actual Gross Profit	\$275.45
Estimated Gross Margin	32.95%	Actual Gross Margin	41.74%
Estimated Hours	4.50	Actual Scheduled Hours	4.50
Estimated Labour Cost	\$202.5000	Actual Hours	4.00
Estimated Labour Price	\$360.00	Actual Labour Rate	180.00
Estimated Labour Profit	\$157.50	Actual Labour Profit	\$180.00
Estimated Material Cost	240.00	Actual Hourly Material Cost	\$68.86
Estimated Material Price	\$300.00	Actual Material Cost	\$204.55
Estimated Material Profit	\$60.00	Actual Material Profit	\$95.45
Estimated COGS Value	\$442.50	Actual COGS Value	\$384.55
Estimated COGS Ratio	67.05%	Actual COGS Ratio	58.26%

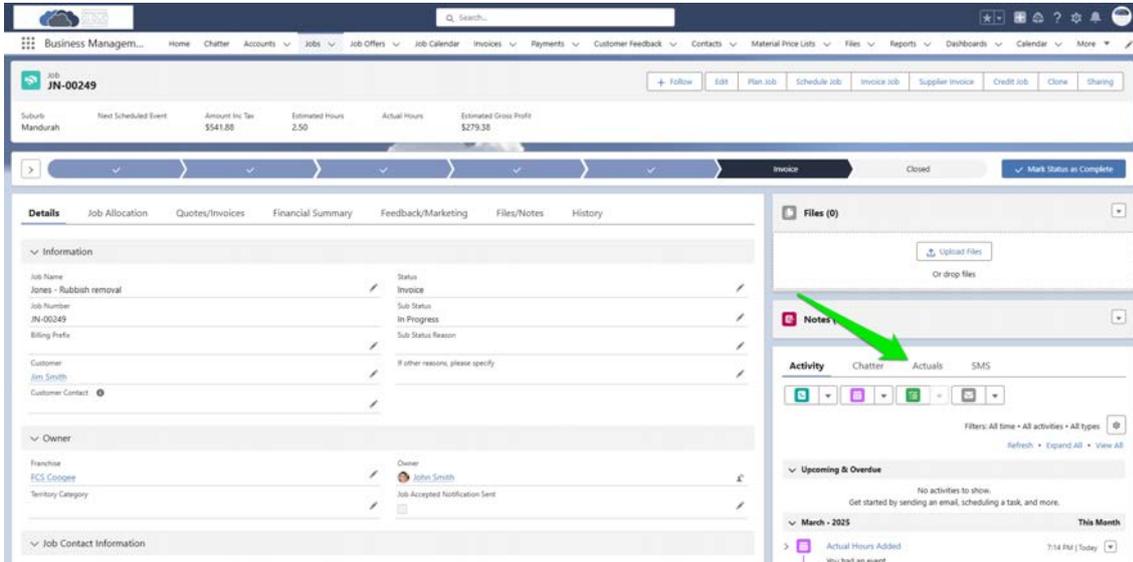
The following topics describe how to log time and materials against a job, so that the actual cost, revenue and profitability of the job is tracked and analyzed.

How to log time against a job

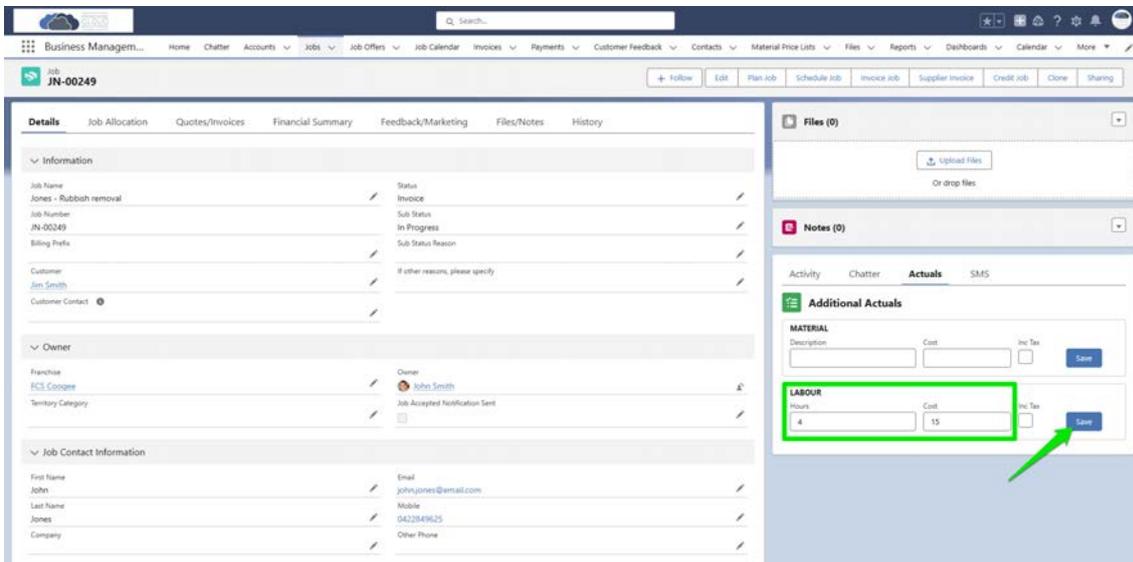
Time can be logged either on-site or by the office. Employees can log time on-site using the mobile app, See “Logging time against a job” on page ccxcix. When time isn’t logged on-site, it can be logged by the office.

To log actual hours spent on the job

1. From the Job, select the Actuals pane.



2. Enter the number of Labour Hours, the Hourly Cost and press Save.



3. The entry of time will cause the **Estimates vs Actuals** section to show updated actuals.

The screenshot shows the 'Financial Summary' tab for job JN-00249. The 'Estimates vs Actuals' section contains the following data:

Estimated	Actual
Estimated Gross Profit	Actual Gross Profit
\$278.38	\$51.25
Estimated Gross Margin	Actual Gross Margin
51.56%	46.07%
Estimated Hours	Actual Scheduled Hours
2.50	0.00
Estimated Labour Cost	Actual Hours
\$0.0000	4.00
Estimated Labour Price	Actual Labour Cost
\$187.50	\$0.00
Estimated Labour Profit	Actual Labour Profit
\$187.50	\$127.50
Estimated Material Cost	Actual Hourly Profits
262.50	\$12.81
Estimated Material Price	Actual Material Cost
\$354.38	
Estimated Material Profit	Actual Material Profit
\$91.88	\$354.38
Estimated COGS Value	Actual COGS Value
\$262.50	\$60.00

How to log material costs against a job

There are two methods for entering material costs against a job:

- » Actual Material Costs
- » Supplier Invoices



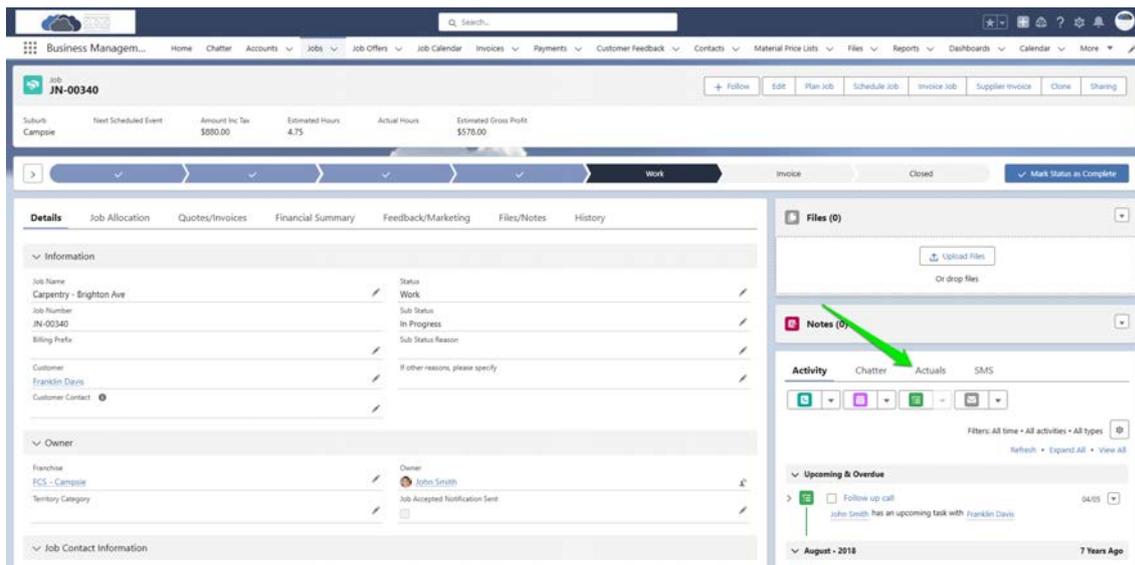
Entering via **Supplier Invoices** is good for reconciling supplier invoices and sending the results to your accounting system.

Entering via Actual Material Costs is a rapid entry method that minimizes the effort needed to track actual costs.

For Supplier Invoice entry, See “How to record purchases against a job” on page ccxxxix. This topic describes Actual Material entry.

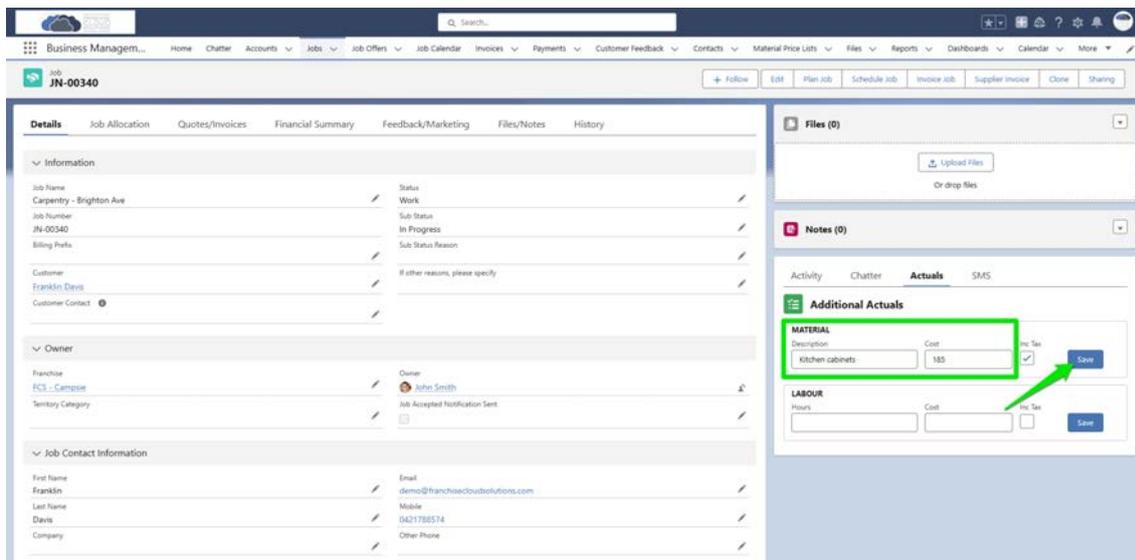
To rapidly log materials against a job

1. From the Job, select the **Actuals** pane.



The screenshot shows the 'Business Management' software interface for job JN-00340. The main content area displays job details such as 'Job Name: Carpentry - Brighton Ave', 'Job Number: JN-00340', and 'Status: Work'. The right-hand sidebar contains several panes: 'Files (0)', 'Notes (0)', and 'Activity'. The 'Activity' pane is active, and the 'Actuals' tab is selected, indicated by a green arrow pointing to it. The 'Actuals' tab shows a list of activities, including 'Follow up call' and 'John Smith has an upcoming task with Franklin Davis'.

2. Enter the Materials Description and Material Cost then press **Save**.



The screenshot shows the 'Business Management' software interface for job JN-00340. The main content area displays job details such as 'Job Name: Carpentry - Brighton Ave', 'Job Number: JN-00340', and 'Status: Work'. The right-hand sidebar contains several panes: 'Files (0)', 'Notes (0)', and 'Activity'. The 'Activity' pane is active, and the 'Actuals' tab is selected. The 'Additional Actuals' form is visible, with a green box highlighting the 'MATERIAL' section. The 'MATERIAL' section has a 'Description' field containing 'Kitchen cabinets' and a 'Cost' field containing '185'. A green arrow points to the 'Save' button next to the 'MATERIAL' section.

3. The entry of time will cause the **Estimates vs Actuals** section to show updated actuals.

The screenshot displays the 'Financial Summary' tab for job JN-00340. The 'Estimates vs Actuals' section is expanded, showing a comparison between estimated and actual values for various financial metrics. A green box highlights the 'Actual Material Cost' of \$158.18 and the 'Actual COGS Rate' of 0.00%. A green arrow points to the 'Financial Summary' tab in the top navigation bar.

Estimated	Actual
Estimated Gross Profit	Actual Gross Profit
\$578.00	-\$168.18
Estimated Gross Margin	Actual Gross Margin
72.25%	0.00%
Estimated Hours	Actual Scheduled Hours
4.75	
Estimated Labour Cost	Actual Hours
\$127,500.00	
Estimated Labour Price	Actual Labour Cost
\$500.00	
Estimated Labour Profit	Actual Labour Profit
\$372.50	\$500.00
Estimated Material Cost	Actual Hourly Profit
\$4.50	\$2.00
Estimated Material Price	Actual Material Cost
\$300.00	\$158.18
Estimated Material Profit	Actual Material Profit
\$205.50	\$111.62
Estimated COGS Value	Actual COGS Value
\$222.00	\$158.18
Estimated COGS Ratio	Actual COGS Ratio
27.73%	0.00%



You can review material entries logged against a job with **Supplier Invoice Line Items**, which are found on the **Job Related** tab.

How to record purchases against a job

Business Management allows you to associate lines from a supplier invoice against a job. This allows you to track the expenses incurred by particular jobs.



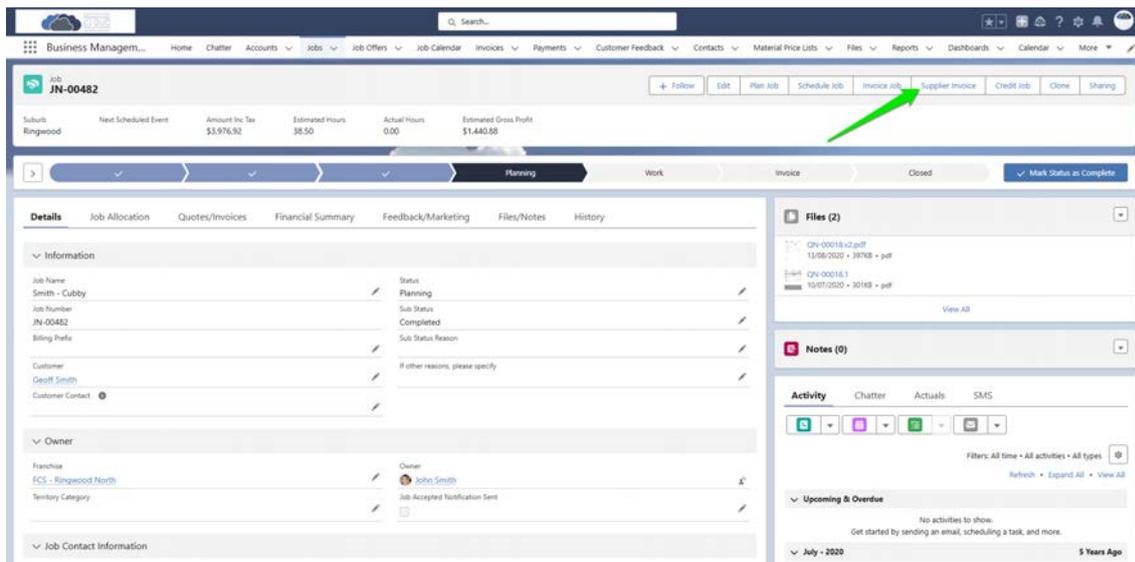
Any one particular supplier invoice may contain lines for multiple jobs. You can specify which supplier invoice lines are associated with the given job.



To raise a supplier invoice, you need to have set up the supplier in the system. See "Adding a supplier" on page cclxxxvii.

To raise a supplier invoice against a job

1. From the Job, press **Supplier Invoice**.



The **Supplier Invoice** dialog box appears.

2. Enter the supplier invoice header details.

Supplier Invoice

*Supplier Invoice Number:

Status:

*Invoice Date:

*Due Date:

Reference:

*Account:

Tax Rate (%) 0

Invoice Amount: 50.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	JN-00482	Summary	50.00	<input checked="" type="checkbox"/>	50.00

Cancel Generate Invoice

3. Enter the beginnings of the supplier name, and select the supplier from the list of search results.

Supplier Invoice

*Supplier Invoice Number:

Status:

*Invoice Date:

*Due Date:

Reference:

*Account:

Tax Rate (%) 0

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	JN-00482	Summary	50.00	<input checked="" type="checkbox"/>	50.00

Cancel Generate Invoice

- Now complete the first supplier invoice line. The Job is automatically selected. Enter a description of the goods in the *Summary*. Choose the *Account Code* if the default mapping is incorrect for this purchase. Enter the *Amount* and then choose whether that amount includes or excludes tax. Click the **+** button for any additional line. When complete, press **Generate Invoice**.

Supplier Invoice

*Supplier Invoice Number: Status:

*Invoice Date: *Due Date: **2**

Reference: *Account:

Tax Rate (%) 10 Invoice Amount \$250.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX	
1	JN-00482 X Timber	310 - Cost of Goods Sold	\$250.00	<input checked="" type="checkbox"/>	\$250.00	+

- The system displays the generated supplier invoice.

The screenshot shows the 'Invoice 89378' details page. The main header includes the invoice number, date, amount, and status. Below this, there are sections for 'Details' and 'Related' information, including sync status, owner (John Smith), and various amounts. On the right, there is an 'Invoice Sender' section with a 'Send Invoice PDF' button and an 'Activity' section with options for logging calls, events, tasks, or emails.

- Supplier invoice lines are displayed on the **Quotes/Invoices** tab.

The screenshot shows the 'Invoice Line Items (1)' section. A table with the following data is highlighted with a green border:

Summary	Amount	Amount Inc Tax	Account Code
Timber	\$227.2727	\$250.00	310

Below the table, there are sections for 'Payments (0)' and 'Syncs (1)'. The right side of the interface remains the same as in the previous screenshot.



As you relate supplier invoices lines to specific jobs, the Job's **Estimates vs Actuals** keeps track of the **Actual Material Cost** on the job.

The screenshot displays the 'Business Management' software interface for job JN-00482. The 'Financial Summary' tab is active, showing a comparison between estimated and actual values. A green arrow points to the 'Financial Summary' tab. In the 'Estimates vs Actuals' section, the 'Actual Material Cost' is highlighted with a green box, showing a value of \$250.00. Below this, the 'Financial Analysis' section for job Smith - Cubby shows an 'Actual Material Cost' of \$250.00, also highlighted with a green box.

Estimated	Actual
Estimated Gross Profit	Actual Gross Profit
\$1,445.88	\$3,375.13
Estimated Gross Margin	Actual Gross Margin
39.85%	83.11%
Estimated Hours	Actual Scheduled Hours
38.50	7.00
Estimated Labour Cost	Actual Labour Cost
\$1,732,500.00	0.00
Estimated Labour Price	Actual Hourly Profit
\$3,080.00	\$3,080.00
Estimated Labour Profit	Actual Hourly Profit
\$1,347.50	\$3,080.00
Estimated Material Cost	Actual Material Cost
442.00	\$250.00
Estimated Material Price	Actual Material Profit
\$535.38	\$265.38
Estimated Material Profit	Actual COGS Value
\$93.38	\$250.00
Estimated COGS Value	Actual COGS Ratio
\$2,174.30	0.00%



For a faster method of logging material purchases, See “How to log material costs against a job” on page ccxxvii.

How the system calculates Actual Labour Cost

There are two sources for Actual Labour costs:

- » [Time logging](#)
- » [Actual Labour logging](#)

Each source calculates time differently.

Actual Labour Cost from time logging

When a mobile user logs time from **Job Calendar Mobile**, Actual Hours is added to the Job. If the user's Contact has a value in the Hourly Rate field, then the addition to Actual Hours is multiplied with the Contact's Hourly Rate to record an Actual Labour Cost.

The screenshot displays the 'Financial Summary' tab for Job JN-00479. The 'Estimates vs Actuals' section contains the following data:

Field	Value
Estimated Gross Profit	\$705.00
Actual Gross Profit	\$742.50
Estimated Gross Margin	78.33%
Actual Gross Margin	82.50%
Estimated Hours	4.00
Actual Scheduled Hours	11.75
Estimated Labour Cost	\$180.0000
Actual Hours	3.50
Estimated Labour Price	\$240.00
Actual Labour Cost	157.50
Estimated Labour Profit	\$60.00
Actual Labour Profit	\$82.50
Estimated Material Cost	15.00
Actual Hourly Profit	\$212.14



To check the Hourly Rate on a Contact:

1. Find your **Franchise Profile Account**. See "How to locate your Franchise Profile Account" on page xxxiv.
2. On the **Details** tab, look for **Related Contacts**.
3. From **Related Contacts**, click on your chosen Contact. (If you can't see it, press **View All**.)
4. In the **Contact**, look for the **Hourly Cost** field in the **Employment** tab under the **Franchise Employee Information** section.

Actual Labour Cost from Actuals Labour logging

When you log time using the **Actuals** pane, you directly enter the Hourly Cost. The Actual Hours and Hourly Costs are multiplied, the result being added to the Job's Actual Labour Cost.

Business Management... Home Chatter Accounts Jobs Job Offers Invoices Payments Customer Feedback Contacts Material Price Lists Files Reports Dashboards Calendar More

Job **JN-00479** + Follow Edit Plan Job Schedule Job Invoice Job Supplier Invoice Credit Job Clone Sharing

Running Work Invoice Closed Mark Status as Complete

Details Job Allocation Quotes/Invoices Financial Summary Feedback/Marketing Files/Notes History

Information

Job Name: Depts - Ringwood North Status: Planning
 Job Number: JN-00479 Sub Status: In Progress
 Billing Prefix: Sub Status Reason:
 Customer: Keryn Miller If other reasons, please specify:
 Customer Contact: Keryn Miller

Owner

Franchise: FCS - Ringwood North Owner: John Smith
 Territory Category: Job Accepted Notification Sent

Job Contact Information

First Name: Keryn Email: keryn.miller@franchisecloudsolutions.com
 Last Name: Miller Mobile: 0421788574

Files (0) Upload Files Or drop files

Notes (0) Activity Chatter Actuals SMS

Additional Actuals

MATERIAL Description Cost Inc Tax Save

LABOUR Hours Cost Inc Tax Save

4 45

Business Management... Home Chatter Accounts Jobs Job Calendar Invoices Payments Customer Feedback Contacts More

Job **JN-00548** + Follow Match Customer Plan Job Schedule Job Invoice Job Supplier Invoice Credit Job Edit Sharing

Suburb: Ringwood Amount Inc Tax: \$660.00 Estimated Hours: 4.50 Actual Hours: Estimated Gross Profit: \$217.50 Actual Gross Profit: \$0.00

Planning Work Invoice Closed Mark Status as Complete

Details Related Job Allocation View

Job Name: Franchise: FCS - Montrose
 Job Number: JN-00548 Owner: John Smith
 Customer: Tim Alford Status: Planning
 Customer Contact: Tim Alford Sub Status: In Progress
 Request Type: Sub Status Reason:
 Due Date: If other reasons, please specify:
 Job Accepted Notification Sent:

Job Contact Information

Salutation: Force Street Address:
 First Name: Street:

Activity Chatter Actuals SMS

Additional Actuals

Material Description Material Cost Inc Tax Save

Labour Hours Hourly Cost Inc Tax Save

4 45

CHAPTER 8

Working with Invoices, Payments & Credit Notes

Understanding invoices, payments & credit notes	ccxlviii
Invoicing a job	ccxlix
How to generate a full invoice	ccxlix
How to generate custom invoices	ccli
How to exclude a line item from the invoice	ccliv
How to invoice in stages	cclvi
How to create and send customer invoices in bulk	cclx
How to invoice based on an Account	cclxi
How to adjust the value of an invoice	cclxv
How to overwrite an invoice	cclxv
How to void an issued invoice	cclxviii
How to re-invoice after voiding an invoice	cclxx
Recording payments against an invoice	cclxxii
How to record a payment	cclxxii
How to allocate a payment to multiple invoices	cclxxiv
How to write off a bad debt	cclxxv
Issuing & allocating credit notes	cclxxviii

How to discount an invoice using a credit note	cclxxviii
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Understanding invoices, payments & credit notes

Business Management makes it super-easy to generate Invoices from Jobs. Business Management ensures that the entire value of the job is invoiced, but no more than the value of the job. It also ensures that the line items appearing on the invoice matches the line items that appeared on your quote, so that your customer can see that your invoicing matches your quoting (while accounting for any changes to the job since the quote was accepted).

Business Management allows you to record payments against an invoice. However, you will find that dedicated financial applications provide more flexible and powerful facilities for recording payments and performing bank reconciliation. To seamlessly support the use of a dedicated financial application, invoices, payments and credits notes are synchronized automatically and manually with Xero.



Business Management can optionally integrate with the Xero accounting software. Check with your system administrator to see whether your business has licensed Franchise Cloud Solutions' Financial Integration option.

Credit notes can be used to round off invoices or to provide immediate or future discounts. Credit notes do not take effect until they are allocated to an invoice. We recommend you create and allocate credit notes in FranchiseOps. Credit notes and allocations will be faithfully synced to Xero.

This chapter describes how to achieve all financial functions within Business Management and recommends which functions are better performed within Xero.



Defining terms

Payments are a record of the payments customers make against invoices. Payments are most comfortably handled in Xero.

Credit notes represent credits you are providing to your customer. You may issue a credit in order to provide a discount on an existing invoice or to be applied to a future purchase. Credit notes are created in FranchiseOps and synced to Xero.

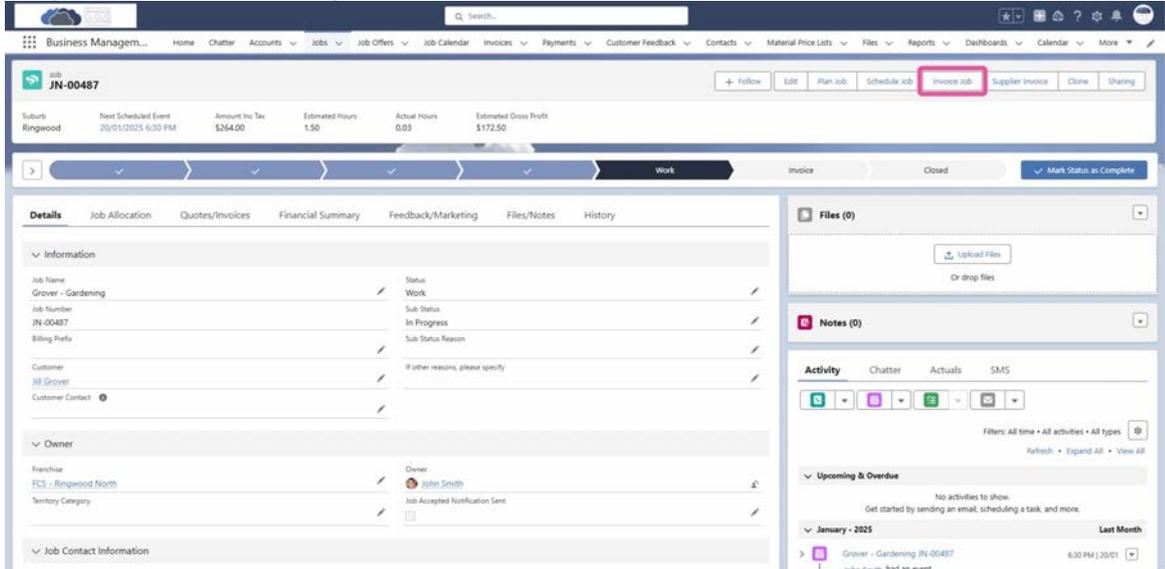
Applying a credit note against an invoice is called a **credit allocation**. When you allocate credit, you are reducing the amount of money owed against that invoice (just like recording a payment against the invoice). Allocations are made in FranchiseOps and are synced to Xero.

Invoicing a job

How to generate a full invoice

To generate and send an invoice to a customer

Begin from the Job to generate the Invoice record as per normal.



1. The Generate Invoice dialog box appears.
2. Once you have entered your chart of accounts' code for sales, press **Generate Invoice**.

Generate Invoice

Summary

Number	INV-00058	Due Date	18/02/2025
Job Name	Grover - Gardening	Job Amount Ex. Tax	\$240.00
Customer Name	Jill Grover	Job Amount Inc. Tax	\$264.00
Tax Rate	10.00%	Job Amount Invoiced	\$0.00
		Job Amount To Invoice	\$264.00
		Invoice Amount	\$264.00

Invoice Lines

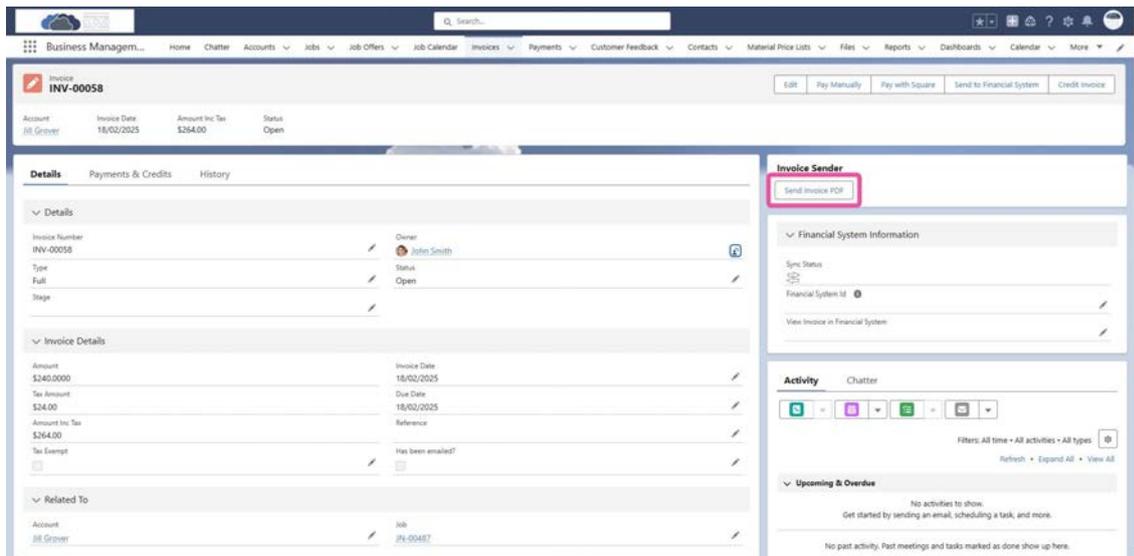
Full Line Custom

SUMMARY	AMOUNT	AMOUNT INC. TAX	ACCOUNT CODE
Gardening service	\$120.00	\$132.00	410
Weeding	\$80.00	\$88.00	410
Mowing	\$40.00	\$44.00	410



If you have connected your Franchise Profile Account to Xero and entered a valid Account Code, the system will automatically send the currently-generated invoice to Xero.

- When you are ready to send the invoice to your customer, press **Send Invoice PDF**.



- The **Compose Email** dialog appears. This is the same dialog as used by the [quote generation](#). This dialog has all the same features as the quote, with the addition that you can optionally add attachments from the **Job** record and the **Invoice** record.



Files and images can be attached to the email within the **Compose Email** dialog.

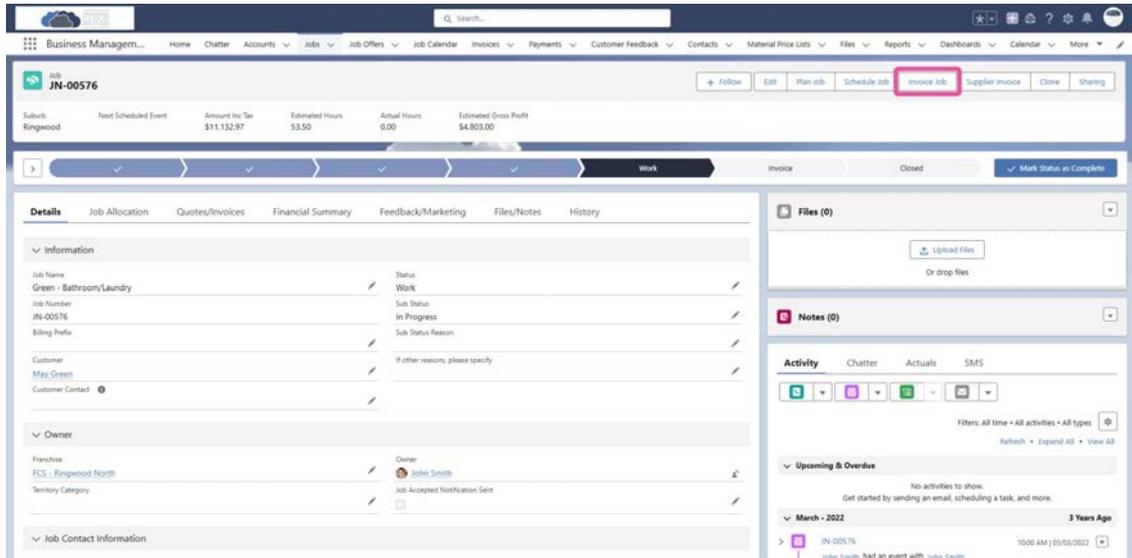
How to generate custom invoices

Sometimes you need to invoice only part of a job, such as a deposit, progress or final invoice. Other times, you will need to invoice only select line items.

Business Management supports these scenarios.

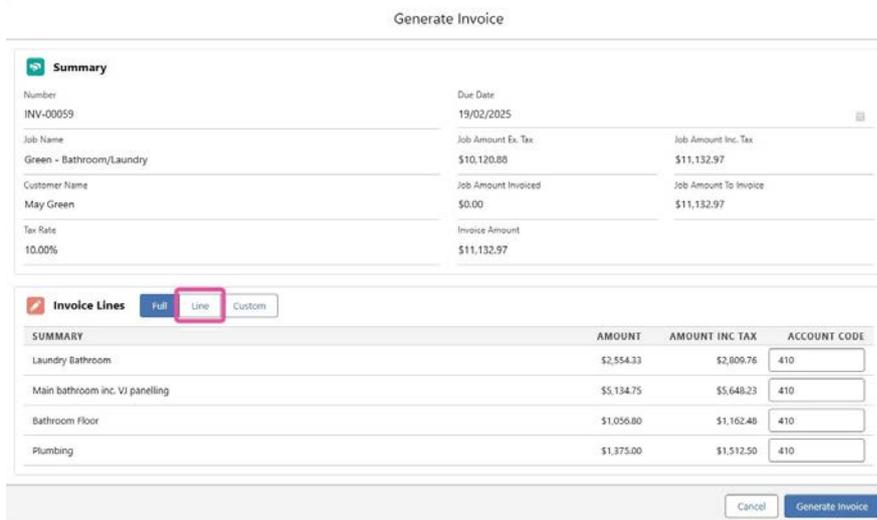
To part invoice by line item

1. From the Job, press Invoice Job.



The Generate Invoice dialog box appears.

2. Select Line.



- Now select the line(s) to be invoiced, then press **Generate Invoice**.

Generate Invoice

Summary

Number	INV-00059	Due Date	19/02/2025		
Job Name	Green - Bathroom/Laundry	Job Amount Ex. Tax	\$10,120.88	Job Amount Inc. Tax	\$11,132.97
Customer Name	May Green	Job Amount Invoiced	\$0.00	Job Amount To Invoice	\$11,132.97
Tax Rate	10.00%	Invoice Amount	\$5,484.74		

Invoice Lines Full Line Custom

SELECT	SUMMARY	AMOUNT	AMOUNT INC TAX	ACCOUNT CODE
<input checked="" type="checkbox"/>	Laundry Bathroom	\$2,554.33	\$2,809.76	410
<input type="checkbox"/>	Main bathroom inc. vj panelling	\$5,134.75	\$5,648.23	410
<input checked="" type="checkbox"/>	Bathroom Floor	\$1,056.80	\$1,162.48	410
<input checked="" type="checkbox"/>	Plumbing	\$1,375.00	\$1,512.50	410

Cancel **Generate Invoice**

An **Invoice** record appears.

- Press **Send Invoice PDF**.

The screenshot shows the 'Business Manager' interface for an invoice record. The main header displays 'Invoice INV-00059' with details: Account: May Green, Invoice Date: 19/02/2025, Amount Inc Tax: \$5,484.74, Status: Open. The left sidebar contains sections for 'Details', 'Invoice Details', and 'Related To'. The right sidebar features the 'Invoice Sender' section, which is highlighted with a red box and contains a 'Send Invoice PDF' button. Below this are sections for 'Financial System Information', 'Activity', and 'Upcoming & Overdue'.

The **Compose Email** box appears.

- Use **Compose Email** to set the recipients, content and attachments. When complete, press **Send**.



For detailed instructions on downloading or emailing a document, See “How to send a quote” on page clvii.

To part invoice a deposit or progress payment

1. From the Job, press Invoice Job.

The screenshot shows the 'Job JN-00576' page in the Business Management software. The top navigation bar includes 'Business Management...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', 'Material Price Lists', 'Files', 'Reports', 'Dashboards', 'Calendar', and 'More'. The job details section shows 'Suburb: Ringwood', 'Next Scheduled Event', 'Amount Inc Tax: \$11,132.97', 'Estimated Hours: 53.50', 'Actual Hours: 0.00', and 'Estimated Gross Profit: \$4,803.00'. The 'Invoice Job' button is highlighted with a red box. Below the job details, there are tabs for 'Details', 'Job Allocation', 'Quotes/Invoices', 'Financial Summary', 'Feedback/Marketing', 'Files/Notes', and 'History'. The 'Details' tab is active, showing 'Information' and 'Owner' sections. The 'Information' section includes fields for Job Name, Job Number, Billing Profile, Customer, and Customer Contact. The 'Owner' section includes Franchise, Territory Category, and Owner. The right sidebar shows 'Files (0)', 'Notes (0)', and 'Activity' sections.

The Invoice dialog box appears.

2. Select Custom.

The screenshot shows the 'Generate Invoice' dialog box. The 'Summary' section displays the following information:

Field	Value	Field	Value
Number	INV-00060	Due Date	19/02/2025
Job Name	Green - Bathroom/Laundry	Job Amount Ex. Tax	\$10,120.88
Customer Name	May Green	Job Amount Inc. Tax	\$11,132.97
Tax Rate	10.00%	Job Amount Invoiced	\$5,484.74
		Job Amount To Invoice	\$5,648.23
		Invoice Amount	\$0.00

The 'Invoice Lines' section has three tabs: 'Full', 'Line', and 'Custom'. The 'Custom' tab is selected and highlighted with a red box. Below the tabs is a table with the following data:

SELECT	SUMMARY	AMOUNT	AMOUNT INC TAX	ACCOUNT CODE
<input type="checkbox"/>	Main bathroom inc. VJ panelling	\$5,134.75	\$5,648.23	410

At the bottom of the dialog box, there are 'Cancel' and 'Generate Invoice' buttons.

- Now enter the value needed for this part payment. Alternatively, enter the desired percentage into the **Quick %** field for an automatic calculation, then press **Generate Invoice**.

Generate Invoice

Summary

Number INV-00060	Due Date 19/02/2025	
Job Name Green - Bathroom/Laundry	Job Amount Ex. Tax \$10,120.88	Job Amount Inc. Tax \$11,132.97
Customer Name May Green	Job Amount Invoiced \$5,484.74	Job Amount To Invoice \$5,648.23
Tax Rate 10.00%	Invoice Amount \$5,648.23	

Invoice Lines Full Line Custom

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
Invoice for Green - Bathroom/Laundry	\$134,7545	<input type="checkbox"/>	\$5,648.23	410 +

Quick % 50.7343%

An **Invoice** record appears.

- Press **Send Invoice PDF**.

The **Compose Email** box appears.

- Use **Compose Email** to set the recipients, content and attachments. When complete, press **Send**.



For detailed instructions on downloading or emailing a document, See “How to send a quote” on page clvii.



To invoice the final amount of part invoiced job, in the **Job** page simply press **Invoice Job** again.

If there is a remaining line item whose value is lower than the uninvoiced amount, you can choose between using **Line** or **Custom** invoices.

How to exclude a line item from the invoice

From time to time you will provide a quote with multiple line items and the customer will choose to proceed with only some of the line items.

To reflect the change in the value of the job, you will need to exclude some line items.

To exclude a line item from the invoice

- In the Job, click on **Plan Job**.

2. Locate the line item you wish to exclude and uncheck the Include checkbox.

The screenshot shows the 'Business Management' interface for job JN-00145. At the top, there are navigation tabs: Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, and Contacts. Below this, the job details for 'Tiling - Terracotta Tiles' are displayed. A green arrow labeled '1' points to the job name 'Tiling'. In the main content area, the 'Tiling' job item is shown with a summary and description. A green arrow labeled '2' points to the 'Include' checkbox, which is currently unchecked. To the left, there are sections for 'Job Tasks (3)' and 'Job Materials (4)'. To the right, there are summary cards for 'Tiling Summary', 'Labour Summary', and 'Material Summary'.

Customer Name	Est Labour Price	Est Material Price	Amount Inc Tax	Est Hours	Est Gross Margin
Danielle Anderson	\$750.00	\$390.00	\$1,254.00	8.00	-5.98%

NAME	DESCRIPTION	TOTAL
Doing the J...	Remove broke...	\$200.00
Doing the J...	Retile	\$400.00
Set up - Pac...	Scaffolding ass...	\$200.00

DESCRIPTI...	QUANTITY	TOTAL
High quality...	3.0	\$336.00
Paint - Bunn...	5.0	\$300.00
Other cons...	3.0	\$112.50
High quality...	2.0	\$137.50

Amount	Est Margin	Hours
\$1,190.00	0%	8

Cost	Profit	Total
\$1,208.20	-\$18.20	\$1,309.00

Cost	Amount	Profit
\$450.00	\$800.00	\$350.00

Cost	Amount	Profit
\$758.20	\$886.00	\$127.80

3. Press Save, then Invoice Job.

This screenshot is identical to the one above, but with two green arrows pointing to the top right of the job details section. Arrow '1' points to the 'Save' button, and arrow '2' points to the 'Invoice Job' button. The 'Include' checkbox for the 'Tiling' job item remains unchecked.



If you discover the customer is not going ahead with the line item before you do the first invoice, you can exclude the line item and then generate a **Full** invoice.

If you discover the customer is not going ahead after you have begun invoicing, it will be most convenient for you to have generated one or more **Line Item** invoices. If, when you exclude the line item, the remaining value falls to zero, the Job will be marked as fully invoiced.

How to invoice in stages

Stage-based invoicing lets you bill customers in steps as work progresses. Business Management helps create invoices at each job stage. How it works:

- » Each stage is linked to a percentage of the total job cost
- » When you complete a stage, you can create an invoice for that percentage
- » Payments match your work milestones
- » The process is straightforward and organized

There are three plans available:

- » 10/40/40/10
- » 20/70/10
- » 10/90

Choosing your invoice stage plan

1. From the Job page, select the **Quotes/Invoices** tab and locate the **Invoice Stage Plan** field under Invoice Information.

The screenshot shows the 'Quotes/Invoices' tab for job JN-00456. The 'Invoice Information' section is expanded, and the 'Invoice Stage Plan' field is highlighted with a red box. The 'Invoice Stage Plan' field is currently set to 'None'.

Job Line It...	Summary	Description	Amount	Amount In...	Include	
1	JN-00234	Single house free standing...	Supply and install single house free standing scaffoldsincludes 1 wee...	\$909.0909	\$1,000.00	<input checked="" type="checkbox"/>

2. Click the pencil icon to edit the field.
3. Click the dropdown arrow and select your stage plan.

The screenshot shows the 'Invoice Information' section for job JN-00456. The 'Invoice Stage Plan' dropdown menu is open, and the '10/10/10' option is selected and highlighted with a red box. The 'Invoice Stage Plan' field is currently set to 'None'.

Job Line It...	Summary	Description	Amount	Amount In...	Include	
1	JN-00234	Single house free standing...	Supply and install single house free standing scaffoldsincludes 1 wee...	\$909.0909	\$1,000.00	<input checked="" type="checkbox"/>

4. Click Save.

The screenshot shows the 'Job' page for JN-00456. The 'Invoice Information' section is visible, with the 'Invoice Stage Plan' dropdown menu open, showing '10/40/40/10' selected. The 'Save' button is highlighted with a red box.

Invoicing in Stages

1. When you are ready, click **Invoice Job** on the Job page.

The system defaults to 'Stage 1' and will show the first percentage from your stage plan. For example, using 10/40/40/10, the first stage is 10% of the job amount.

The screenshot shows the 'Generate Invoice' screen. The 'Summary' section shows 'Job Amount Ex. Tax' as \$909.09 and 'Job Amount Inc. Tax' as \$1,000.00. The 'Invoice Lines' section shows 'Stage 1' with a percentage of 10.0000%. The 'Generate Invoice' button is highlighted with a red box.



At any time before issuing the first invoice, you could change your mind and generate a full invoice. See “How to generate a full invoice” on page ccxlix. Once you have generated the first invoice in a stage plan, you can continue invoicing using the stage plan or switch to using a custom invoice.

2. Click **Generate Invoice**.
3. Once you have made progress on the job and are ready for the next invoice, click **Invoice Job**.

- The default is Stage 2 and the second percentage of the Job Amount. For example, 10/40/40/10.

Generate Invoice

Summary

Number INV-00058		Due Date 18/02/2025
Job Name Scaffolding, Jones	Job Amount Ex. Tax \$909.09	Job Amount Inc. Tax \$1,000.00
Customer Name Greg Jones	Job Amount Invoiced \$100.00	Job Amount To Invoice \$900.00
Tax Rate 10.00%	Invoice Amount \$400.00	

Invoice Lines Full Line Custom Stage 2 40.0000%

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
Invoice for Scaffolding, Jones	363.6364	<input type="checkbox"/>	\$400.00	410 +

Cancel Generate Invoice



Full invoice is no longer available as there is already a custom invoice for the job.

- Click **Generate Invoice**.
Using the 10/40/40/10 plan, you have now invoiced 50% of the job.
- Repeat this process until you have invoiced all stages and 100% of the job.



If you are not ready to charge the amount in the next stage, you can create a custom invoice by changing the amount, or by changing the percentage in the stage field. The Stage field changes to Quick %. The next time you invoice, it will try to invoice any remaining money from the current stage. .

Generate Invoice

Summary

Number INV-00058		Due Date 18/02/2025
Job Name Scaffolding, Jones	Job Amount Ex. Tax \$909.09	Job Amount Inc. Tax \$1,000.00
Customer Name Greg Jones	Job Amount Invoiced \$100.00	Job Amount To Invoice \$900.00
Tax Rate 10.00%	Invoice Amount \$200.00	

Invoice Lines Full Line Custom Quick % 20.0000%

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
Invoice for Scaffolding, Jones	181.82	<input type="checkbox"/>	\$200.00	410 +

Cancel Generate Invoice

Changes to the invoice amount

When Job Costs Change After Stage 1

If you need to increase the total job cost after sending the stage 1 invoice:

- » The system will move to the next planned stage as usual
- » The percentage on your next invoice will be higher than originally planned
- » This higher percentage accounts for the price increase
- » The system automatically adjusts to keep your cumulative invoiced amount in line with completed stages



Example using a 10/40/40/10 Stage Plan

You have an Invoice with a Job Amount of \$1,000 with the 10/40/40/10 Invoice Stage Plan. You have already invoiced Stage 1 and Stage 2, which is 50% of the Job Amount or \$500.

You then increase the amount on the Invoice by \$200. There is now \$700 remaining to invoice.

After Stage 3 you will have invoiced 90% of the job (10 + 40 + 40), so the system prepares an invoice with the percentage required to have 90% invoiced. In this case, Stage 3 will be 48.3333%.

After Stage 3 is invoiced (90%), Stage 4 will be the default percentage (10%).

How to create and send customer invoices in bulk

Bulk invoicing lets you process multiple jobs from different customers all at once. How it works:

- » Select jobs from multiple customer accounts
- » Generate all invoices in a single operation
- » Send all invoices simultaneously

This feature saves time when you need to invoice many jobs at once.

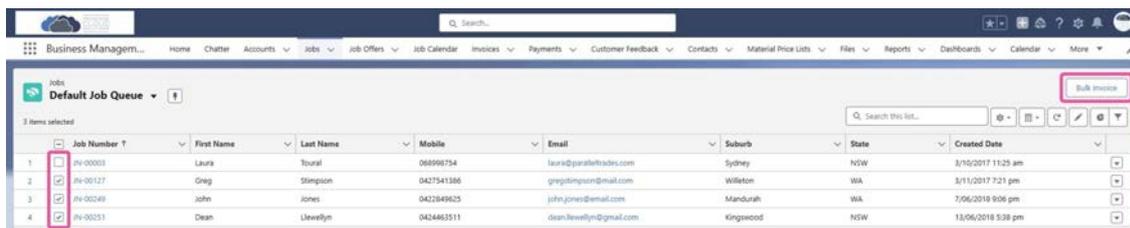


Bulk invoicing is not available for jobs that already have an invoice.

The invoices will be sent to the email on the account customer contact using the current default email template.

To create and send customer invoices in bulk

1. Starting from a Jobs list view, select the checkbox of the jobs you want to invoice, then select **Bulk Invoice**.

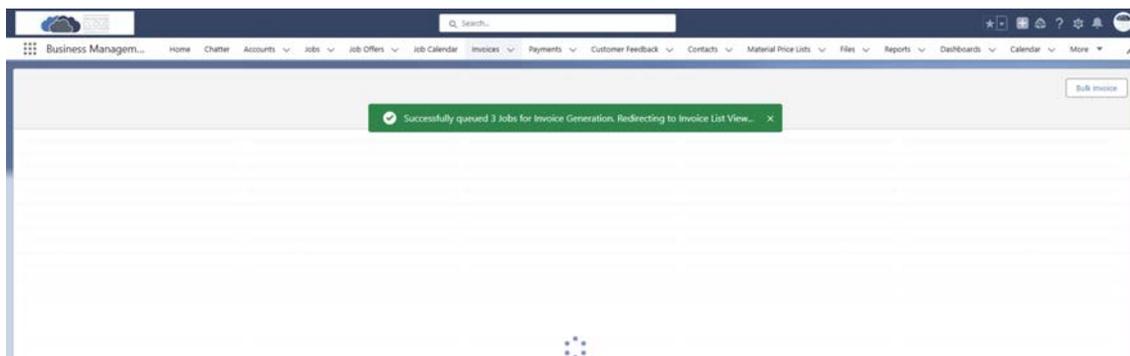


The **Bulk Invoice Jobs** dialog box appears.

2. Confirm the number of Jobs you selected is correct and select **Yes, Generate Invoices**.



A success message will display: **Successfully queued x Jobs for Invoice Generation.**



You will now find the generated invoices in the selected jobs **Quotes/Invoices** tab. A copy of the email sent to the customer containing the Invoice is logged in the Activity panel of the Invoice record.

How to invoice based on an Account

Account-based invoicing lets you invoice multiple jobs from one customer onto a single invoice. The benefits to this are:

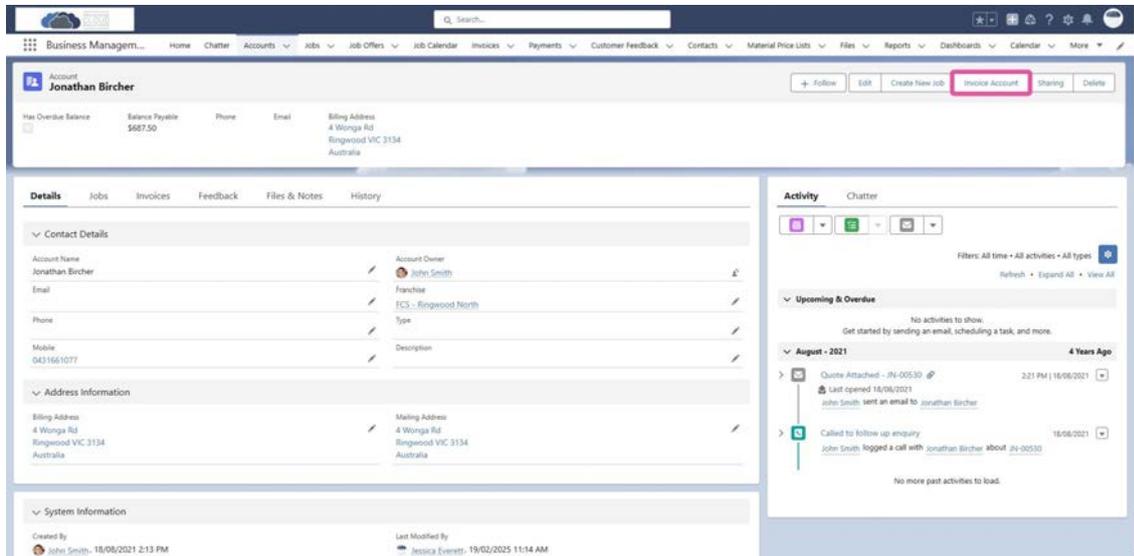
- » Fewer invoices to create and track
- » Simpler and more regular billing process for you and your customers
- » All related work appears on one document
- » Easier for customers to manage payments



To invoice a job based on an Account, it must have a Status of **Invoice** with a Sub Status of **Pending**.

To invoice based on an Account

1. Begin from the page of the Account you wish to invoice and select **Invoice Account**.



The **Generate Invoice** dialog box appears.

2. Before you generate the invoice you can select:
 - » Invoice all jobs with invoices pending from the account (Full)
 - » Invoice select jobs (Line)
 - » Enter an amount for a part payment or deposit (Custom)

To invoice all pending jobs

Ensure the Invoice Lines option is **Full**, then select **Generate Invoice**.

Generate Invoice

Summary

Number INV-00060	Due Date 19/02/2025	
Account Name Jonathan Bircher	Account Amount Ex. Tax \$919.38	Account Amount Inc. Tax \$1,011.32
	Account Amount To Invoice \$1,011.32	
Tax Rate 10.00%	Invoice Amount \$1,011.32	

Invoice Lines Full Line Custom

SUMMARY	AMOUNT	AMOUNT INC TAX	ACCOUNT CODE
JN-00633 - Bircher - Rubbish removal	\$221.88	\$244.07	410
JN-00634 - Bircher - Fence Repair	\$687.50	\$767.25	410

To invoice some of the pending jobs

Select Line.

Generate Invoice

Summary

Number: INV-00060 Due Date: 19/02/2025

Account Name: Jonathan Bircher Account Amount Ex. Tax: \$919.38 Account Amount Inc. Tax: \$1,011.32

Account Amount To Invoice: \$1,011.32

Tax Rate: 10.00% Invoice Amount: \$0.00

Invoice Lines Full **Line** Custom

SELECT	SUMMARY	AMOUNT	AMOUNT INC TAX	ACCOUNT CODE
<input type="checkbox"/>	JN-00633 - Bircher - Rubbish removal	\$221.88	\$244.07	410
<input type="checkbox"/>	JN-00634 - Bircher - Fence Repair	\$697.50	\$767.25	410

Now select the jobs to be invoiced, then select **Generate Invoice**.

Generate Invoice

Summary

Number: INV-00060 Due Date: 19/02/2025

Account Name: Jonathan Bircher Account Amount Ex. Tax: \$919.38 Account Amount Inc. Tax: \$1,011.32

Account Amount To Invoice: \$1,011.32

Tax Rate: 10.00% Invoice Amount: \$767.25

Invoice Lines Full **Line** Custom

SELECT	SUMMARY	AMOUNT	AMOUNT INC TAX	ACCOUNT CODE
<input type="checkbox"/>	JN-00633 - Bircher - Rubbish removal	\$221.88	\$244.07	410
<input checked="" type="checkbox"/>	JN-00634 - Bircher - Fence Repair	\$697.50	\$767.25	410

To enter a part payment or deposit amount

Select **Custom** and enter the value or percentage needed for this part payment, then select **Generate Invoice**.

Generate Invoice

Summary

Number: INV-00060 Due Date: 19/02/2025

Account Name: Jonathan Bircher Account Amount Ex. Tax: \$919.38 Account Amount Inc. Tax: \$1,011.32

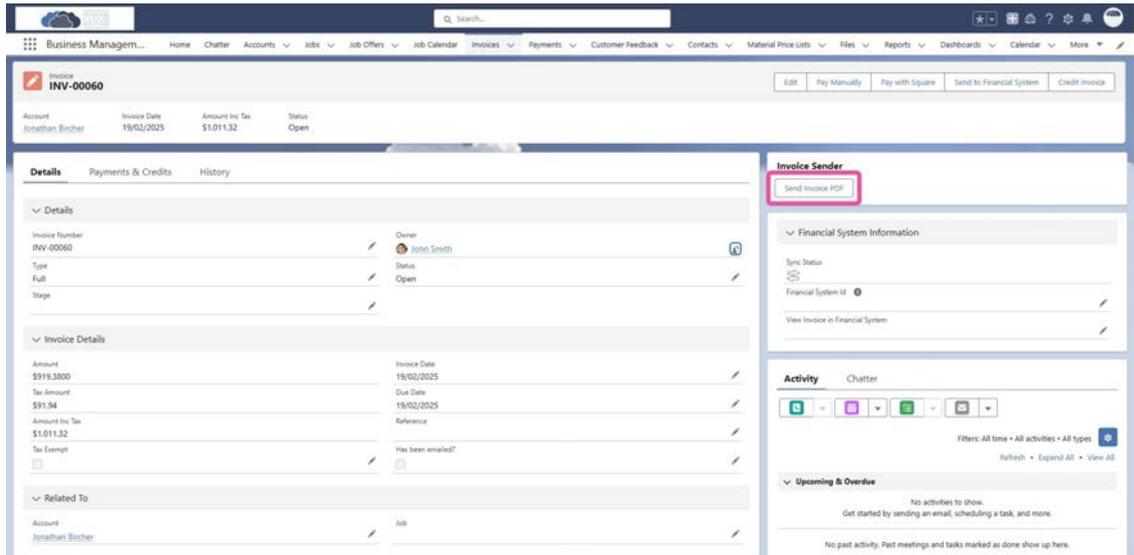
Account Amount To Invoice: \$1,011.32

Tax Rate: 10.00% Invoice Amount: \$1,011.32

Invoice Lines Full **Line** **Custom** Quick %: 100.0000%

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
Invoice for Jonathan Bircher	919.3818	<input type="checkbox"/>	\$1,011.32	410 +

3. A new invoice is now ready to send to your customer. To send it, select **Send Invoice PDF**.



The **Compose Email** dialog box appears.

4. Use **Compose Email** to set the recipients, content, and attachments. When complete, select **Send**.

How to Include All Jobs on Your Invoice

Match Your Job Schedule to Your Invoice Schedule

The repeating job schedule must match or be less frequent than your invoice schedule. For example:

- » If you invoice monthly, you can set up daily, weekly, or monthly repeating jobs
- » If you invoice weekly, you can set up daily or weekly repeating jobs, but not monthly

What Happens If Schedules Don't Match

If your job repeats more often than you invoice, some jobs might not appear on the invoice.



If you mow a lawn twice a month but invoice monthly, the job might only appear once.

Solution: Create Separate Named Jobs

To ensure all jobs appear on your invoice:

- » Create multiple jobs with slightly different names

» Set each job to repeat at the invoice frequency



Example for fortnightly lawn mowing with monthly invoicing:

- » Create "Mow front lawn (Week 1)" - repeats monthly
- » Create "Mow front lawn (Week 3)" - repeats monthly

This way, both lawn mowing jobs will appear as separate line items on your monthly invoice.



Example for three weekly lawn mowing with monthly invoicing:

- » Create "Mow front lawn (Seq 1)" - repeats three weekly
- » Create "Mow front lawn (Seq 2)" - repeats three weekly

This way, when both sequences happen to fall in the same month, both lawn mowing jobs will appear as separate line items on the monthly invoice.

How to adjust the value of an invoice

You may want to adjust the value or update the details of a generated invoice.



You may have allowed for certain materials within your Job Plan and generated an invoice for the job on that basis. But if you used more materials, you may choose to adjust the invoice.

There are multiple ways of achieving this, depending on the type of **Job** or the status of the **Invoice**. Here are the options.

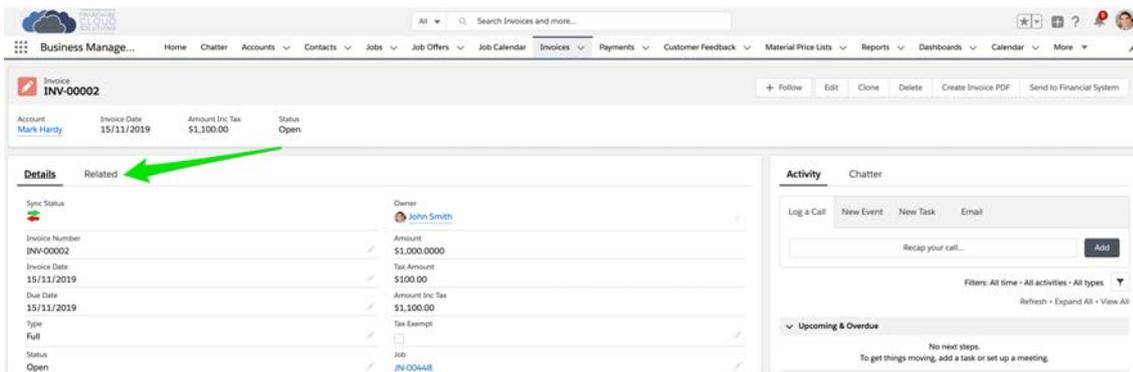
Job	Invoice	Procedure
Standard Job	Invoice not yet sent	"How to overwrite an invoice" below
Standard or Repeating Job	Invoice is sent but has no payments	"How to void an issued invoice" on page cclxviii
Standard or Repeating Job	Invoice has at least one payment	"Issuing & allocating credit notes" on page cclxxviii

How to overwrite an invoice

For jobs that are not marked as repeating, you can overwrite an invoice if it is not yet sent to the customer.

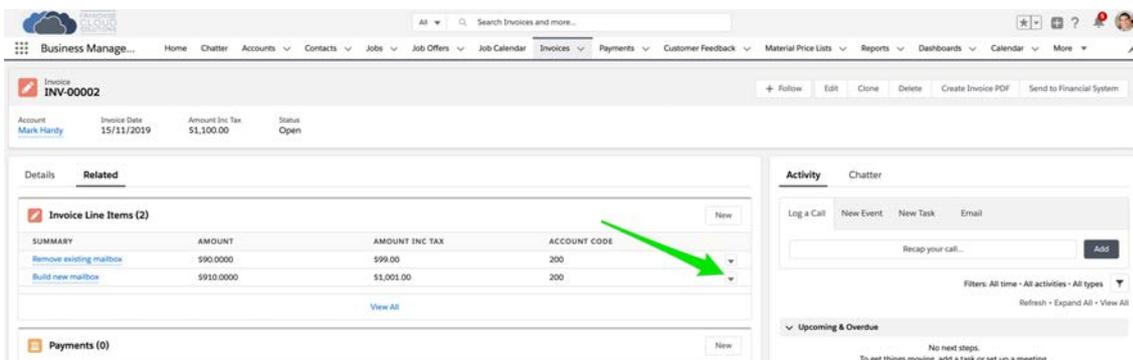
To overwrite an invoice

1. Locate the Invoice in Salesforce and choose the **Related** tab.



The screenshot shows the Salesforce interface for an invoice (INV-0002). The 'Related' tab is selected, indicated by a green arrow. The 'Details' section shows invoice information: Account (Mark Hardy), Invoice Date (15/11/2019), Amount Inc Tax (\$1,100.00), and Status (Open). The 'Activity' section shows options for logging a call, creating a new event, task, or email, and a 'Recap your call...' button. The 'Upcoming & Overdue' section shows 'No next steps'.

2. From the **Related** tab, located the **Invoice Line Items** section, and select the **more actions** drop-down.



The screenshot shows the 'Invoice Line Items (2)' section in the 'Related' tab. A green arrow points to the 'more actions' drop-down menu. The table lists two line items:

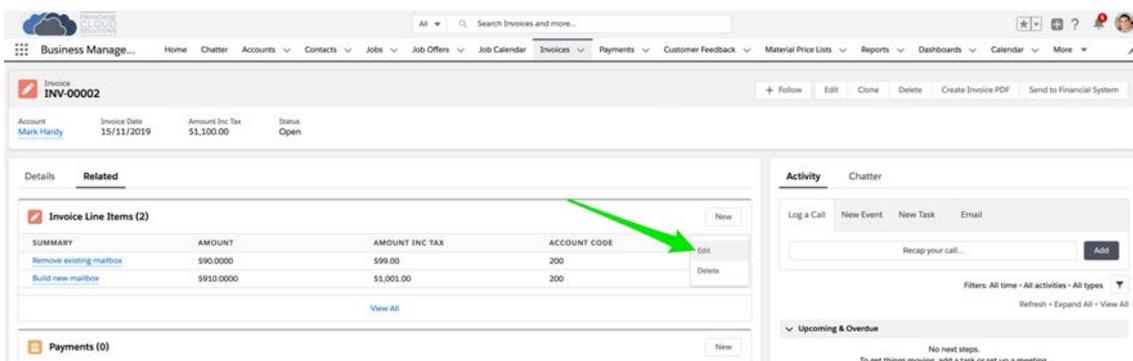
SUMMARY	AMOUNT	AMOUNT INC TAX	ACCOUNT CODE
Remove existing mailbox	\$90.0000	\$99.00	200
Build new mailbox	\$910.0000	\$1,001.00	200

Below the table is a 'View All' link. The 'Payments (0)' section is also visible.



Alternatively, you may want to add a new Line item. You can do this by choosing **View All** and then **New**.

3. Then choose to **Edit** the Line Item.



The screenshot shows the 'Invoice Line Items (2)' section with the 'Edit' button highlighted by a green arrow. The table structure is the same as in the previous screenshot.

4. The line item dialog box appears. Adjust the value and insert a comment to explain the change in the Description field., then press **Save**.

Edit Build new mailbox

Sync Status
Summary
Build new mailbox

* Amount
1,050.0000

Tax Amount
\$91.00

Amount Inc Tax
\$1,001.00

Job
Search Jobs...

Description
As quoted, with additional concreting.

Invoice
INV-00002

Display Order
2

Tax Exempt

Tax Rate
10.00%

System Information

Created By
John Smith, 15/11/2019 2:15 PM

Last Modified By
John Smith, 15/11/2019 2:31 PM

Currency
AUD - Australian Dollar

Account Code
200

Financial System Id
Xero - 7bd9b8a8-d3...-783-b94938b311f2

Cancel Save & New Save

5. Having modified the invoice line item, note the change reflected on the Invoice header.

Business Management... Home Chatter Accounts Contacts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Material Price Lists Reports Dashboards Calendar More

Invoice INV-00002

Account Mark Hardy Invoice Date 15/11/2019 Amount Inc Tax \$1,254.00 Status Open

Details Related

Sync Status	Owner John Smith
Invoice Number INV-00002	Amount \$1,140.0000
Invoice Date 15/11/2019	Tax Amount \$114.00
Due Date 15/11/2019	Amount Inc Tax \$1,254.00
Type Full	Tax Exempt <input type="checkbox"/>
Status Open	Job IN-00448

Activity Chatter

Log a Call New Event New Task Email

Recap your call... Add

Filters: All time - All activities - All types

Upcoming & Overdue

No next steps. To get things moving, add a task or set up a meeting.

6. Now ensure the change is updated into Xero by pressing **Send to Financial System**.

Business Management... Home Chatter Accounts Contacts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Material Price Lists Reports Dashboards Calendar More

Invoice INV-00002

Account Mark Hardy Invoice Date 15/11/2019 Amount Inc Tax \$1,254.00 Status Open

Details Related

Sync Status	Owner John Smith
Invoice Number INV-00002	Amount \$1,140.0000
Invoice Date 15/11/2019	Tax Amount \$114.00
Due Date 15/11/2019	Amount Inc Tax \$1,254.00
Type Full	Tax Exempt <input type="checkbox"/>
Status Open	Job IN-00448

Activity Chatter

Log a Call New Event New Task Email

Recap your call... Add

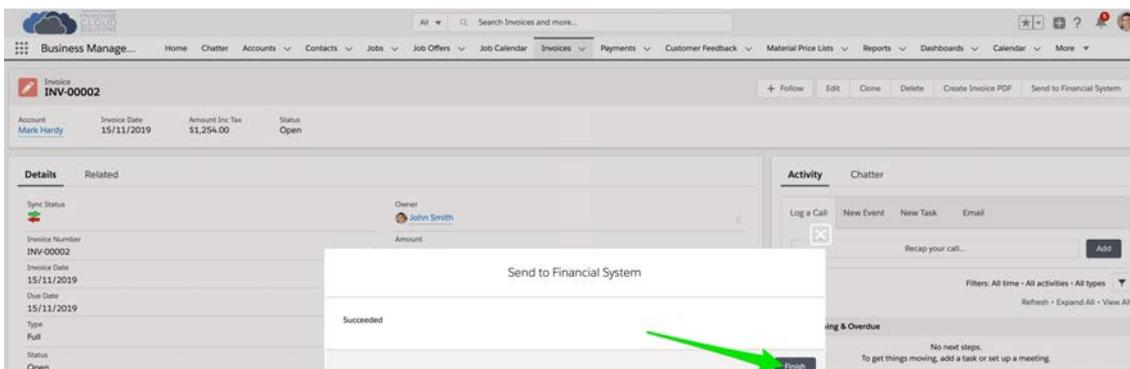
Filters: All time - All activities - All types

Upcoming & Overdue

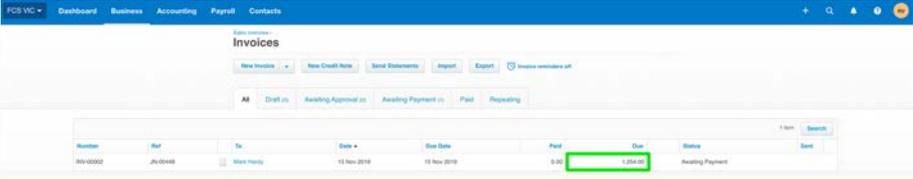
No next steps. To get things moving, add a task or set up a meeting.

Send to Financial System

7. When the sync is complete, the system shows a success message.



 The change is replicated to the external financial system.



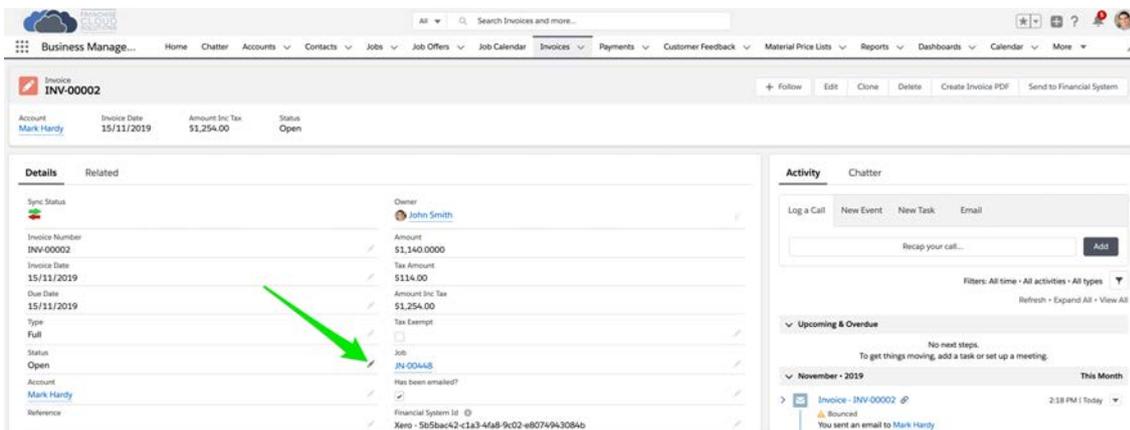
A screenshot of an external financial system interface. The top navigation bar includes 'FCS VIC', 'Dashboard', 'Business', 'Accounting', 'Payroll', and 'Contacts'. The main heading is 'Invoices'. Below it, there are buttons for 'New Invoice', 'New Credit Note', 'Send Statements', 'Import', and 'Export'. A table of invoices is displayed with columns: Number, Ref, To, Date, Due Date, Paid, Due, and Status. The first row shows 'INV-00002', 'JN-0048', 'Mark Hardy', '10 Nov 2019', '10 Nov 2019', '0.00', '1,254.00', and 'Awaiting Payment'. The 'Due' value '1,254.00' is highlighted with a green box.

How to void an issued invoice

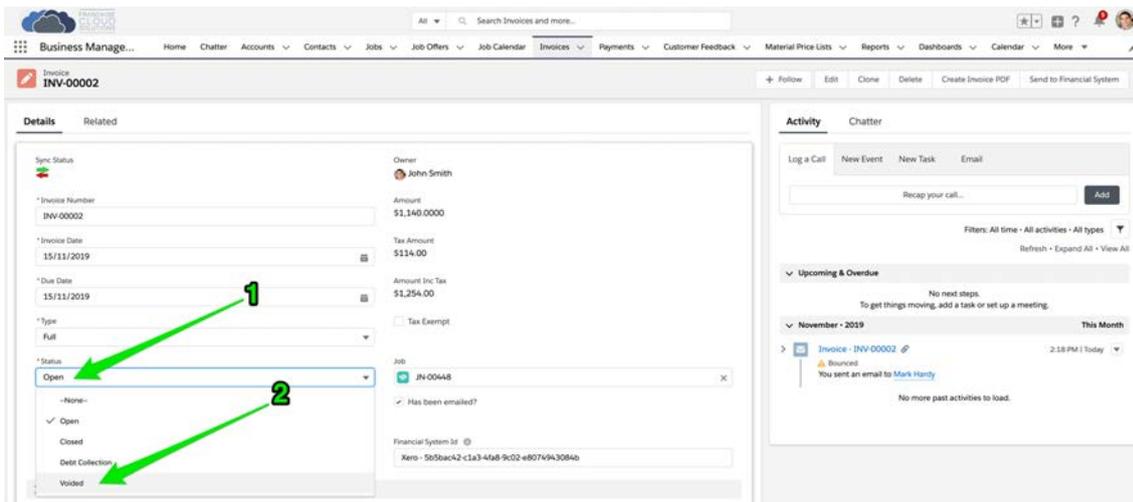
When you have issued an invoice and need to alter it, you can void the invoice and then re-generate it.

To void an invoice

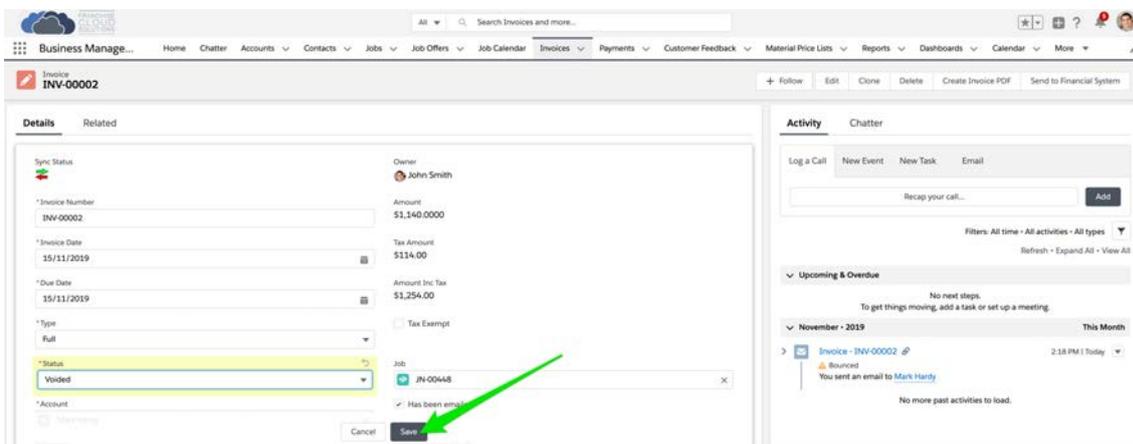
1. From the **Invoice**, switch the **Status** field into edit mode.



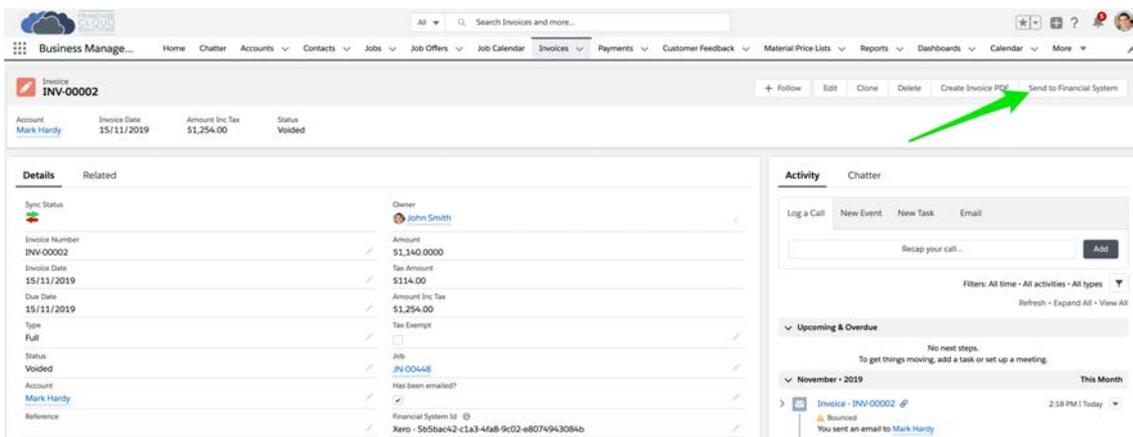
2. Open the *Status* drop-down, and select *Voided*.



3. Now press **Save**.



4. If you are synchronizing with Xero, press **Send to Financial System**. This will send the update to your financial system.





The effect of syncing a voided invoice to Xero will differ depending on how the mapping is configured.

- » When you have the mapping set to *AUTHORISED*, voiding an invoice in Salesforce will cause the invoice to be voided in Xero.
- » When you have the mapping set to *DRAFT*, voiding an invoice in Salesforce will cause the invoice to be deleted from Xero.



After voiding an invoice, you will most likely want to generate a new invoice. See “How to re-invoice after voiding an invoice” below

How to re-invoice after voiding an invoice

When you have voided an invoice against a job, you will most likely want to regenerate the invoice.

To regenerate an invoice

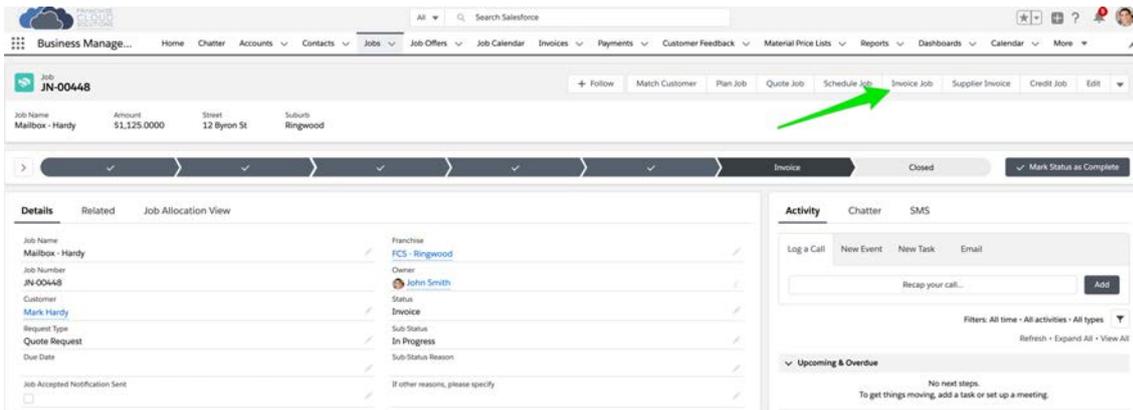
1. From the **Job**, make any necessary changes to **Plan Job**.

The screenshot shows the Salesforce interface for a job record. The top navigation bar includes buttons for '+ Follow', 'Match Customer', 'Plan Job', 'Quote Job', 'Schedule Job', 'Invoice Job', 'Supplier Invoice', and 'Credit Job'. A green arrow points to the 'Plan Job' button. Below the navigation bar, the job details are displayed, including Job Name, Amount, Street, and Suburb. The 'Details' section shows fields for Job Name, Job Number, Customer, Request Type, and Due Date. The 'Activity' section shows options for Log a Call, New Event, New Task, and Email.

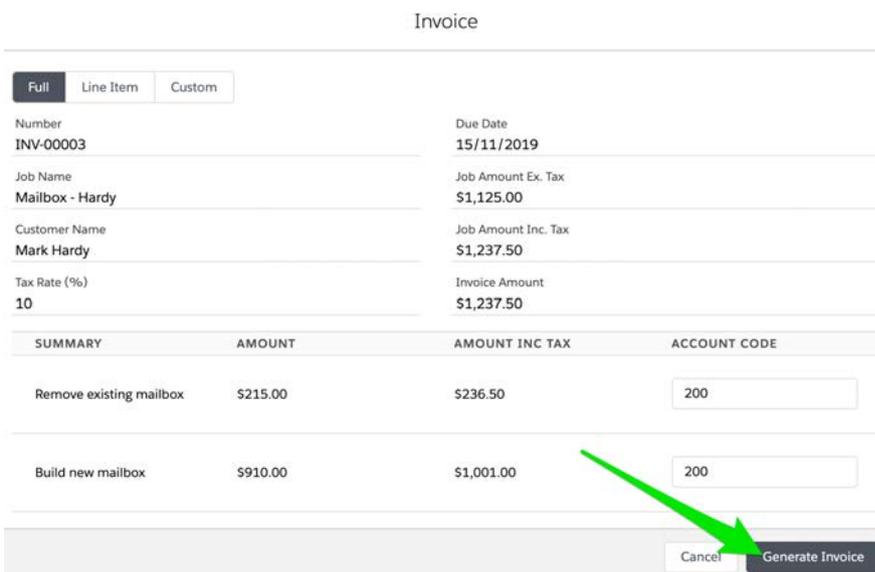


To understand how to make changes to the job plan, See “Job planning and estimation” on page cxxv.

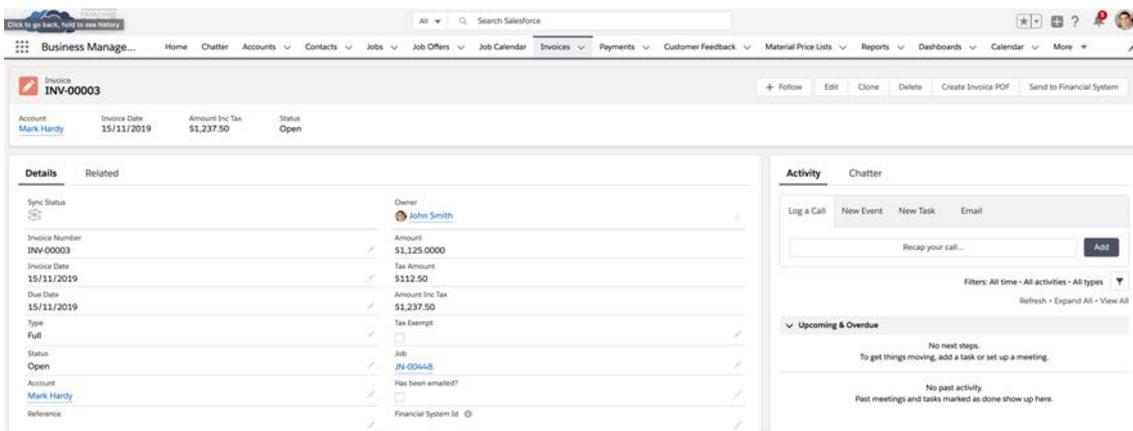
2. Once you're ready to generate the Invoice, press **Invoice Job**.



3. The Invoice dialog displays. Create a **Full**, **Line Item** or **Custom** invoice as desired then press **Generate Invoice**.



4. The newly generated invoice displays.



Recording payments against an invoice

How to record a payment



It is preferable to record your payments in Xero if you are using financial integration. Any payments recorded in Xero will be pulled back to Salesforce (generally within 15 minutes). You can immediately retrieve changes to payment by manually choosing the **Pull from Financial System** button.

If you are not using financial integration with Xero, you can record payments within FranchiseOps. You record payments against an invoice. You first locate the invoice generated for a particular job, then you record the payment against the invoice.

To record a payment against an invoice using FranchiseOps

1. From the **Invoice**, select the **Related** tab.

The screenshot displays the Salesforce interface for an invoice record. The top navigation bar includes 'Business Managem...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. A search bar is present. The main content area shows the invoice details for 'INV-00019' with fields for Account (Alistair Campbell), Invoice Date (19/04/2018), Amount Inc Tax (\$942.15), and Status (Open). The 'RELATED' tab is highlighted with a green arrow. Below the main details, there is a 'Payment Details' section with fields for Amount Paid (\$0.00), Amount Credited (\$0.00), and Amount Owing (\$942.15). The right-hand side of the interface shows the 'ACTIVITY' and 'CHATTER' tabs, with a 'Log a Call' button and a 'Create new...' button.

2. From the **Payments** section, press **New**.

The screenshot shows the Salesforce Business Management interface. At the top, there is a search bar and navigation tabs for Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, and Payments. The 'Payments' tab is selected, showing details for invoice INV-00019. Below the invoice details, there are sections for 'RELATED' items: 'Invoice Line Items (1)', 'Payments (0)', and 'Credit Allocations (0)'. A green arrow points to the 'New' button next to the 'Payments (0)' section. To the right, there is an 'ACTIVITY' section with options like 'Log a Call', 'New Event', 'New Task', and 'More'.

The **New Payment** dialog box appears.

3. Press **Next**.

The 'New Payment' dialog box is shown. It has a title 'New Payment' and a subtitle 'Select a record type'. There are two radio buttons: 'Payment' (selected) and 'Credit Allocation'. At the bottom, there are two buttons: 'Cancel' and 'Next'. A green arrow points to the 'Next' button.

The **New Payment** dialog box appears with **Invoice** automatically selected.

4. Complete the payment information, then press **Save**.

New Payment: Payment

Information

Payment Number	* Invoice INV-00019
* Type Payment	Amount 940.00
* Payment Method Cash	Effective Date 19/04/2018
Reference	Status Paid in full

System Information

Currency Australian Dollar	Record Type Payment
-------------------------------	------------------------

Cancel Save & New Save

5. The New Payment dialog box is saved and the payment appears on the Invoice.

The screenshot shows the Salesforce interface for an invoice (INV-00019). The 'RELATED' section is expanded to show 'Payments (1)'. A new payment record is visible with the following details:

PAYMENT NUMBER	TYPE	STATUS
PMT-000081	Payment	Paid in full

The 'Payments (1)' section is highlighted with a green border. The 'ACTIVITY' section on the right shows options for 'Log a Call', 'New Event', 'New Task', and 'More'.

How to allocate a payment to multiple invoices

Xero provides direct support for allocating a single payment to multiple invoices. If you are using financial integration with Xero, do the payment allocation in Xero.

For those who are using FranchiseOps only, you can create multiple payments, each with a common reference number.



You may find it useful for the reference number to be the bank transaction number.

How to write off a bad debt

Sometimes we are unable to collect income from an invoice we generated, resulting in a bad debt. Here's how to write off a bad debt if you're using Xero.

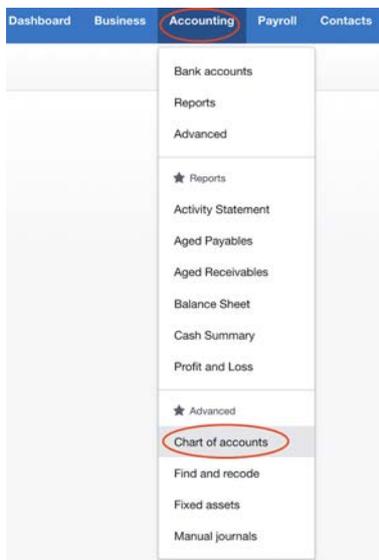


What you need

To implement this solution, your chart-of-accounts is going to need a Bad Debt expense account. You then need to ensure it allows payments (described below).

To ensure the Bad Debt account can accept payments

1. In Xero, go to **Accounting > Chart of Accounts**.



2. Scroll down to the Bad Debt account and select it.



3. Ensure **Enable payments to this account** is checked. If it isn't, check it and then press **Save**.



Now that you've set up your Bad Debt account, you're ready to write off your invoice.

To write off your invoice as a bad debt

1. Locate the invoice, open it and find the **Receive a payment** section.
2. In the **Amount Paid** field, enter the amount of money you want to write off (inc. GST). Within **Date Paid**, record the current date. In the **Paid To** drop down, select the *Bad Debt* account.

To	Date	Due Date	Invoice #	Reference	Online Payments	Total
Jo Bayliss 73 Toole St HOPE TOWN VIC 3396 AUSTRALIA Edit address	21 Oct 2022	4 Nov 2022	INV-01006	JN-1822839	None. Get set up now	330.00

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Territory	Amount AUD
	Work completed	1.00	300.00		Residential	GST on Income	HAH Birchip	300.00
Subtotal								300.00
Total GST 10%								30.00
TOTAL								330.00

Enter the details of the payment here

Receive a payment

Amount Paid: 330.00 | Date Paid: 21 Oct 2022 | Paid To: 970 - Owner A Share Capital | Reference: | [Add Payment](#)

Expenses

- 560 - Direct Salary & Wages
- 612 - Bad Debts Expense**
- 689 - Franchise Super

History & Notes

Edited by Hiva A Hubby on 21 Oct 2022 at 13:00
INV-01006 to Jo Bayliss for 330.00.

3. Enter a Reference (optional) and then select **Add Payment**.



The written off payment will sync back to Salesforce and update the invoice, usually within 15 minutes (depending on configuration).

Issuing & allocating credit notes

How to discount an invoice using a credit note

Sometimes you need to discount an issued invoice. There are a variety of reasons you may choose to do this:

- » You may choose to round off an invoice when a customer pays in cash
- » You may choose to provide a quoted line for free, or
- » You may choose to provide a discount to the quoted invoice.



In the example below, we are providing a “rounding discount.” A rounding discount is paid when the invoice is generated in dollars and cents and the customer pays in whole dollars.

To provide a discount on an invoice

1. From the **Invoice**, note the value of **Amount Owning**.

The screenshot displays the Franchise Cloud Solutions Business Manager interface. The main content area shows an invoice for INV-00041. The 'Amount Owning' is highlighted in a green box. The interface includes a navigation menu at the top, a search bar, and various action buttons for the invoice. The 'Payment Details' section is expanded, showing the amount paid, amount credited, and the amount owing.

Account	Invoice Date	Amount Inc Tax	Status
Fred Styles	11/05/2022	\$691.21	Open

Details	Related
Sync Status	Owner
Invoice Number	Amount
Invoice Date	Tax Amount
Due Date	Amount Inc Tax
Type	Tax Exempt
Status	Job
Account	Has been emailed?
Reference	Financial System Id
	Xero - 88a87852-44d8-4457-9f34-120203e40264

Payment Details	
Amount Paid	Date Paid
Amount Credited	Days to Pay
Amount Owning	

2. Press Credit Invoice.

The screenshot shows the 'Business Management' interface. At the top, there is a navigation bar with 'Home', 'Tasks', 'Chatter', 'Accounts', 'Jobs', 'Job Calendar', 'Invoices', 'Contacts', 'Audits', and 'More'. The 'Invoices' section is active, displaying details for invoice 'INV-00041'. A green arrow points to the 'Credit Invoice' button in the top right corner of the invoice details section.

Invoice INV-00041

Account: Fred Styles | Invoice Date: 11/05/2022 | Amount Inc Tax: \$691.21 | Status: Open

Details

Sync Status	Owner
Invoice Number: INV-00041	John Smith
Invoice Date: 11/05/2022	Amount: \$628.3700
Due Date: 11/05/2022	Tax Amount: \$62.84
Type: Full	Amount Inc Tax: \$691.21
Status: Open	Tax Exempt: <input type="checkbox"/>
Account: Fred Styles	Job: JN-00600
Reference: JN-00600	Has been emailed?: <input type="checkbox"/>
	Financial System Id: Xero - 88a87852-44d8-4457-9f34-120203e40264

Payment Details

Amount Paid: \$690.00	Date Paid
Amount Credited: \$0.00	Days to Pay
Amount Owing: \$1.21	

Invoice Sender

Send Invoice PDF

Activity

Log a Call | New Event | New Task | More

Recap your call... Add

Filters: All time - All activities - All types

Refresh - Expand All - View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

The **Credit Note** dialog box opens.

3. Enter the value for which this **Credit Note** is being issued.

Credit Note

Invoice Number: CR-00042 | Reference: INV-00041

Amount Inc Tax: 1.21

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
1 Credit no	\$1.21	<input checked="" type="checkbox"/>	\$1.21	410

Cancel | **Generate Credit Note**

Note: Green arrows in the original image point to the 'AMOUNT' field (1), the 'TAX INCLUSIVE' checkbox (2), and the 'Generate Credit Note' button (3).

4. Press **Generate Credit Note**.

The **Credit Note** invoice displays.

The screenshot shows a software interface for 'Business Management' with a navigation menu including Home, Tasks, Chatter, Accounts, Jobs, Job Calendar, Invoices, Contacts, Audits, and More. The main content area displays an invoice for 'Fred Styles' with ID 'CR-00042'. The invoice details include: Account (Fred Styles), Invoice Date (11/05/2022), Amount Inc Tax (\$1.21), and Status (Open). The 'Details' section is split into 'Sync Status' and 'Owner' (John Smith). The 'Invoice Number' is CR-00042, 'Job' is JN-00600, 'Invoice Date' is 11/05/2022, 'Status' is Open, 'Amount Inc Tax' is \$1.21, 'Account' is Fred Styles, and 'Reference' is Financial System Id. The 'System Information' section shows it was created by John Smith on 11/05/2022 at 11:25 AM, with a currency of AUD - Australian Dollar and a record type of Credit Note. The 'Invoice Sender' section has a 'Send Invoice PDF' button. The 'Activity' section shows options to 'Log a Call', 'New Event', 'New Task', and 'More', with a 'Recap your call...' button and an 'Add' button. The 'Upcoming & Overdue' section shows 'No next steps' and 'No past activity'.



Now you need to allocate the Credit Note to the invoice. See “How to allocate credit to an invoice” below.

How to allocate credit to an invoice

When you issue a credit note, you generally need to allocate it to an invoice.

To allocate a credit note to an invoice

1. From the **Credit Note**, press the **Related** tab.

The screenshot displays the Franchise Cloud Solutions Business Management interface. At the top, there is a navigation bar with a search bar and various menu items. The main content area shows an invoice (CR-00042) with details such as Account (Fred Styles), Invoice Date (11/05/2022), Amount Inc Tax (\$1.21), and Status (Open). Below the invoice details, there are two tabs: 'Details' and 'Related'. A green arrow points to the 'Related' tab. The 'Related' tab shows a list of related items, including a credit note (JN-00600) with details like Total Amount Allocated (\$0.00), Amount Inc Tax (\$1.21), and Credit Balance (\$1.21). The 'System Information' section shows the invoice was created by John Smith on 11/05/2022 at 11:25 AM and is a Credit Note. On the right side, there is an 'Invoice Sender' section with a 'Send Invoice PDF' button, and an 'Activity' section with options to log a call, new event, or new task.

2. From the **Credit Allocations** section, press **New**.

The screenshot shows the 'Business Management' interface for 'FRANCHISE CLOUD SOLUTIONS'. The main header includes a search bar and navigation tabs: Home, Tasks, Chatter, Accounts, Jobs, Job Calendar, Invoices, Contacts, Audits, and More. The current view is for an invoice titled 'Invoice CR-00042' with account 'Fred Styles', invoice date '11/05/2022', amount inc tax '\$1.21', and status 'Open'. Below the invoice details, there are three sections: 'Invoice Line Items (1)' with one item 'Credit note for INV-00041' for \$1.21; 'Credit Allocations (0)' with a 'New' button highlighted by a green arrow; and 'Syncs (2)' with two items 'S536008' and 'S536010'. On the right side, there is an 'Invoice Sender' section with a 'Send Invoice PDF' button, and an 'Activity' section with options like 'Log a Call', 'New Event', and 'New Task', along with a 'Recap your call...' button and filters.

The New Payment dialog box opens.

3. Choose **Credit Allocation**, then press **Next**.

The 'New Payment' dialog box is shown with the title 'New Payment'. It contains a section 'Select a record type' with two radio buttons: 'Payment' (unselected) and 'Credit Allocation' (selected). A green arrow labeled '1' points to the 'Credit Allocation' radio button. Another green arrow labeled '2' points to the 'Next' button at the bottom right of the dialog box. The 'Cancel' button is also visible next to the 'Next' button.

The **New Payment: Credit Allocation** dialog box opens.

4. Select the Invoice, enter the Amount and Effective Date and then press Save.

New Payment: Credit Allocation

Information

Payment Number

*Type **Credit Allocation**

Credit Note **CR-00042**

Reference

Status

*Invoice **INV-00041**

Amount **1.21**

Effective Date **11/05/2022**

System Information

Currency **AUD - Australian Dollar**

Record Type **Credit Allocation**

Financial System Id

Depending on the underlying payment method, you may find it useful to include a transaction number in the Reference field or to assign a Status.

5. The credit invoice is now allocated as a payment against the customer invoice.

Business Management... Home Tasks Chatter Accounts Jobs Job Calendar Invoices Contacts Audits More

Invoice CR-00042 + Follow Edit Send to Financial System Pull From Financial System Credit Invoice

Account **Fred Styles** Invoice Date **11/05/2022** Amount Inc Tax **\$1.21** Status **Closed**

Details Related

Invoice Line Items (1)

Summary	Job	Amount In...
1 Credit note for INV-00041		\$1.21

Credit Allocations (1)

Payment Number	Invoice
1 PMT-000176	INV-00041

Invoice Sender

Send Invoice PDF

Activity Chatter

Log a Call New Event New Task More

Recap your call... Add

Filters: All time - All activities - All types

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

6. You can check that this is correct by selecting the Invoice.

The screenshot shows the 'Invoice CR-00042' page. At the top, there are navigation tabs: Home, Tasks, Chatter, Accounts, Jobs, Job Calendar, Invoices, Contacts, Audits, and More. The 'Invoices' tab is selected. Below the navigation, there are buttons: '+ Follow', 'Edit', 'Send to Financial System', 'Pull From Financial System', and 'Credit Invoice'. The main header displays: Account: Fred Styles, Invoice Date: 11/05/2022, Amount Inc Tax: \$1.21, Status: Closed.

Under the 'Details' tab, there are two sections:

- Invoice Line Items (1)**: Shows 1 item. A table with columns: Summary, Job, Amount In... The row contains: 1, Credit note for INV-00041, \$1.21.
- Credit Allocations (1)**: Shows 1 item. A table with columns: Payment Number, Invoice. The row contains: 1, PMT-000176, INV-00041. A green arrow points to the 'INV-00041' link.

On the right side, there is an 'Invoice Sender' section with a 'Send Invoice PDF' button. Below it is an 'Activity' section with buttons for 'Log a Call', 'New Event', 'New Task', and 'More'. There is also a 'Recap your call...' button and an 'Add' button. Filters are set to 'All time • All activities • All types'. An 'Upcoming & Overdue' section shows 'No next steps'.

7. Review Payment Details. Check that the Amount Owning is \$0.00. When this is the case the credit note has been correctly allocated.

The screenshot shows the 'Invoice INV-00041' page. The navigation and buttons are the same as in the previous screenshot. The main header displays: Account: Fred Styles, Invoice Date: 11/05/2022, Amount Inc Tax: \$691.21, Status: Closed.

Under the 'Details' tab, there are two sections:

- Invoice Details**: A table with columns: Sync Status, Invoice Number, Invoice Date, Due Date, Type, Status, Account, Reference. The rows contain: Sync Status (green check), INV-00041, 11/05/2022, 11/05/2022, Full, Closed, Fred Styles, JN-00600.
- Owner**: John Smith.
- Amount**: \$628.3700
- Tax Amount**: \$62.84
- Amount Inc Tax**: \$691.21
- Tax Exempt**:
- Job**: JN-00600
- Has been emailed?**:
- Financial System Id**: Xero - 88a87852-44d8-4457-9f34-120203e40264

The 'Payment Details' section is highlighted with a green box and contains:

Amount Paid	Date Paid
\$690.00	
Amount Credited	Days to Pay
\$1.21	
Amount Owning	
\$0.00	

On the right side, there is an 'Invoice Sender' section with a 'Send Invoice PDF' button. Below it is an 'Activity' section with buttons for 'Log a Call', 'New Event', 'New Task', and 'More'. There is also a 'Recap your call...' button and an 'Add' button. Filters are set to 'All time • All activities • All types'. An 'Upcoming & Overdue' section shows 'No next steps'.

How to allocate credit against multiple invoices

Sometimes you may need to allocate credit against multiple invoices.



For example, you may have generated multiple invoices for a single job

- » a deposit,
- » a progress payment, and
- » the final invoice.

After issuing the final invoice the customer raises an issue. After negotiation, you agree to issue a credit. This results in a credit note needing to be allocated across the three invoices.

To allocate a credit note to multiple invoices

1. Generate the Credit Note record. See “How to discount an invoice using a credit note” on page cclxxviii.
2. Now allocate part of the value of the credit note to the first invoice. See “How to allocate credit to an invoice” on page cclxxx.
3. Repeat allocation steps 2 through 4 until you have allocated the entire value of the credit note.

CHAPTER 9

Working with Suppliers & Supplier Invoices

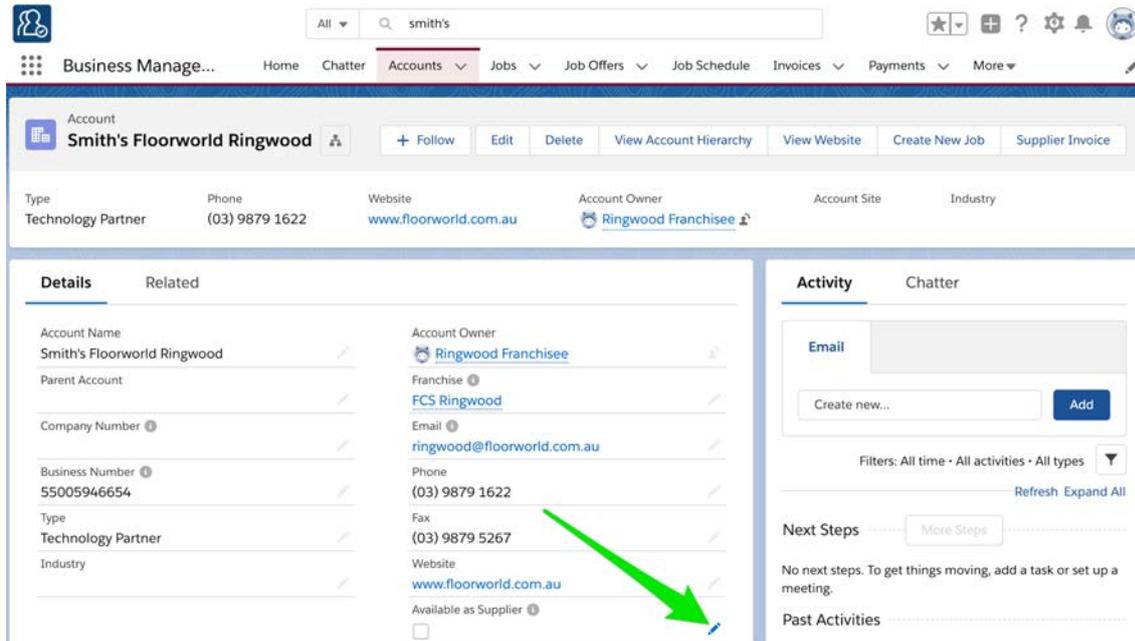
Adding a supplier	cclxxxvii
Creating a supplier invoice	cclxxxix

Adding a supplier

Business Management represent suppliers as a special type of Business Account.

To add a supplier account

1. Create a business account. See “How to create an account for a business” on page lxxx.
2. Now complete the account creation by entering all relevant details then pressing **Save**.
3. From the **Account**, press the **Edit** button.



The screenshot shows the 'Account' page for 'Smith's Floorworld Ringwood'. The account is a 'Technology Partner' with a phone number of (03) 9879 1622 and a website of www.floorworld.com.au. The account owner is 'Ringwood Franchisee'. The 'Details' section is expanded, showing fields for Account Name, Parent Account, Company Number, Business Number (55005946654), Type (Technology Partner), and Industry. The 'Account Owner' section shows 'Ringwood Franchisee', 'FCS Ringwood', and email 'ringwood@floorworld.com.au'. The 'Available as Supplier' checkbox is currently unchecked, and a green arrow points to it. The 'Activity' section shows an 'Email' activity with a 'Create new...' button and an 'Add' button. The 'Next Steps' section shows 'More Steps' and a message: 'No next steps. To get things moving, add a task or set up a meeting.' The 'Past Activities' section is empty.

4. Check Available as Supplier. Enter the Default Tax Rate, then press Save.

The screenshot shows the 'Details' tab for an account named 'Smith's Floorworld Ringwood'. The 'Available as Supplier' checkbox is checked and highlighted in yellow. A green arrow labeled '1' points to the 'Type' dropdown menu, and another green arrow labeled '2' points to the 'Available as Supplier' checkbox. A 'Save' button is visible at the bottom right of the form.

The account is now available in the system as a supplier.

Creating a supplier invoice

Business Management allows you to associate lines from a supplier invoice against a job. This allows you to track the expenses incurred by particular jobs.



You can also record purchases not intended for a job (i.e. purchases for stock). To do this, ensure the Job on the invoice line is blank.

To record a supplier invoice

1. From the Salesforce Accounts list, select the Business Accounts list view.

Billing State	Billing Postcode	Phone	Account Owner	Owner First Name	Owner Last Name
VIC	3183	0431661077	ooff	OPS	Head Office Manager
VIC	3140	0411628422	ifan	Llydale	FranchiseOwner
VIC	3140	0431661077	FO	John	Smith
VIC	3134	0431661077	FO	John	Smith

2. Select the target supplier account.

Account Name	Billing State	Billing Postcode	Phone	Last Job Date	Account Owner Alias	Created Date
Smith's Floorworld Ringwood	NSW	2022	03 9879 1622		FO	1/08/2019 4:07 PM

3. From the Account page, press Supplier Invoice.

Account: Smith's Floorworld Ringwood

Details Related

Field	Value
Account Name	Smith's Floorworld Ringwood
Parent Account	
Company Number	
Business Number	55005946654
Type	
Industry	

Account Owner: John Smith
Franchise: FCS - Ringwood
Email: ringwood@floorworld.com.au
Phone: 03 9879 1622
Website: www.floorworld.com.au
Available as Supplier:
Default Tax Rate: 20.00%

Activity Chatter

Log a Call New Event New Task Email

Recap your call... Add

Filters: All time - All activities - All types

Refresh - Expand All - View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity.
Past meetings and tasks marked as done show up here.

The Supplier Invoice dialog box appears.

4. Enter the supplier invoice header details.

Supplier Invoice

*Supplier Invoice Number DB932	Status Open
*Invoice Date 19/11/2019	*Due Date 26/11/2019
Reference DB932A	
Tax Rate (%) 10	Invoice Amount \$0.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX	
1	<input type="text" value="Search Job"/> Q	<input type="text" value="Summary"/>	<input type="text" value="310"/>	<input type="text" value="\$0.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="\$0.00"/> +

5. Now enter the first line, attributing the line to a job in the system.

Supplier Invoice

*Supplier Invoice Number DB932	Status Open
*Invoice Date 19/11/2019	*Due Date 26/11/2019
Reference DB932A	
Tax Rate (%) 10	Invoice Amount \$56.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX	
1	<input type="button" value="JN-00156"/> X	<input type="text" value="Grout"/>	<input type="text" value="310"/>	<input type="text" value="\$56.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="\$56.00"/> +

6. Press the + button to add a second line.

Supplier Invoice

*Supplier Invoice Number DB932	Status Open
*Invoice Date 19/11/2019	*Due Date 26/11/2019
Reference DB932A	
Tax Rate (%) 10	Invoice Amount \$56.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX	
1	<input type="button" value="JN-00156"/> X	<input type="text" value="Grout"/>	<input type="text" value="310"/>	<input type="text" value="\$56.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="\$56.00"/> +
2	<input type="button" value="JN-00156"/> X	<input type="text" value="Summary"/>	<input type="text" value="310"/>	<input type="text" value="\$0.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="\$0.00"/> <input type="button" value="X"/>

7. When the invoice is complete, press **Generate Invoice**.

Supplier Invoice

*Supplier Invoice Number: Status:

*Invoice Date: *Due Date:

Reference:

Tax Rate (%) 10 Invoice Amount: \$3,306.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	<input type="text" value="JN-00156"/> <input type="text" value="Grout"/>	<input type="text" value="310"/>	<input type="text" value="\$56.00"/>	<input checked="" type="checkbox"/>	\$56.00
2	<input type="text" value="JN-00156"/> <input type="text" value="Tiles"/>	<input type="text" value="310"/>	<input type="text" value="\$3,250.00"/>	<input checked="" type="checkbox"/>	\$3,250.00

8. The supplier invoice is now generated.

The screenshot displays the 'Business Management' software interface. At the top, there is a navigation menu with options like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, Material Price Lists, Files, Reports, Dashboards, and More. A search bar is located next to the menu. The main content area shows the details of a supplier invoice for account 'D8932' at 'Smith's Floorworld Ringwood'. The invoice date is '19/11/2019', the amount is '\$3,306.00', and the status is 'Open'. The 'Details' section lists various fields such as 'Sync Status', 'Invoice Number', 'Invoice Date', 'Due Date', 'Type', 'Status', 'Account', and 'Reference'. The 'Owner' section shows 'John Smith' with a profile picture and contact information. The 'Activity' panel on the right shows options to 'Log a Call', 'New Event', 'New Task', and 'Email', along with a 'Recap your call...' button and filters for 'All time - All activities - All types'. The 'Upcoming & Overdue' section shows 'No next steps' and 'No past activity'.



Supplier Invoices are optionally synchronized with Xero. To send a Supplier Invoice to Xero, press the **Send to Financial System** button.

CHAPTER 10

Using Salesforce on Mobile Devices

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To place a call or send an SMS	cccxxvi
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Taking notes, photos and videos in the field	cccxxxiii
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A day on the road

Between Franchise Cloud Solutions, Salesforce and your mobile phone, we have you covered to run your entire day from the road.

All the most commonly performed tasks can be done from the road

- » Accepting a job offer
- » Locating the newly-accepted job
- » Dialing the customer with a single touch
- » Logging conversations
- » Rapidly creating a new customer account (Match Customer)
- » Booking a site visit
- » Clocking onto a job
- » Taking photos and attaching it to the job
- » Creating and sending a quote
- » Creating and sending an invoice
- » Receiving a cash payment (and seeing that it is sent to Xero)

How to install and open Salesforce on your mobile

Salesforce produces the Salesforce Mobile app for iOS or Android. You will need to install Salesforce Mobile, and then to log into Salesforce Mobile using the same account you use to log onto Salesforce in the browser.

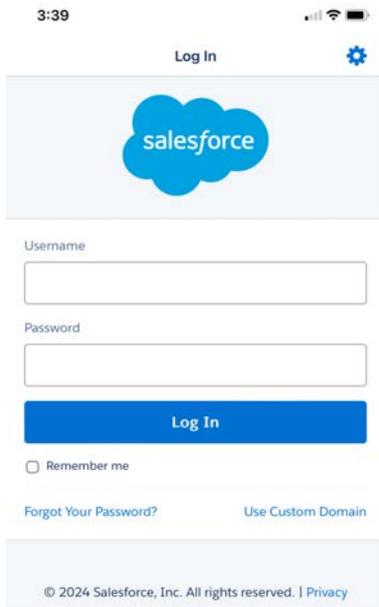
To install and log into the mobile Salesforce app

1. [Download and install the Salesforce mobile app](#) onto your mobile phone.



2. Open the Salesforce app.

3. On the **Log In** page, enter your Username, Password, check the Remember me checkbox, then press **Log In**.



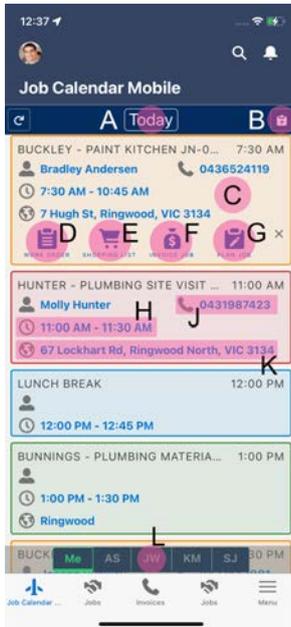
The screenshot shows the Salesforce mobile login interface. At the top, the status bar displays the time 3:39, signal strength, Wi-Fi, and battery icons. Below the status bar, the text "Log In" is centered, with a gear icon to its right. A blue cloud logo with the word "salesforce" inside is positioned below the header. The main form area contains two input fields: "Username" and "Password". Below these fields is a blue "Log In" button. Underneath the button is a checkbox labeled "Remember me". At the bottom of the form, there are two links: "Forgot Your Password?" and "Use Custom Domain". The footer of the page contains the text "© 2024 Salesforce, Inc. All rights reserved. | Privacy".

Viewing today's appointments

Job Calendar Mobile sits at the heart of the mobile experience. It provides access to features frequently used while visiting customers. Users with a *Mobile* license can access all features except those marked as *Business Management only*.

Here's a summary of the clickable elements within a Job Calendar Mobile event.

At a glance



A Change date filter for the page

B Quick Job

C Tap twice to go to Event Detail

D Work order

E Shopping list

F Invoice Job

G Plan Job (*Business Management license only*)

H Check in / check out times (or duration)

J Phone or send text message to mobile number

K Map and directions Android uses Google Maps & iPhone uses Apple Maps

L Show another resource calendar (*Business Management license only*)

The display colour of an **Event** on the Job Calendar depends on the **Type** of event.



By default, the system shows your appointments for today.

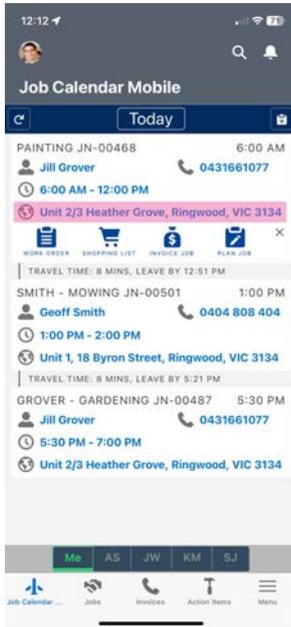
» To see yesterday's or tomorrow's appointments, tap on **A**.

» As a Business Management user, see another resource's appointments by tapping on **L**.

Travel directions to a job

You can get travel directions via your mobile phone's default maps application.

Travel directions



To get travel directions from your current location to the next job, tap on the address.

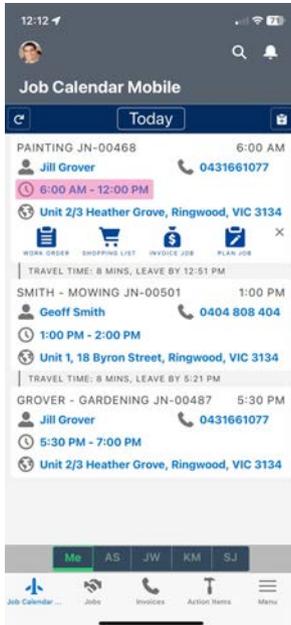
Tapping on the address will open the default map for your operating system:

- » Apple Maps for iOS
- » Google Maps for Android

Logging time against a job

Job Calendar Mobile's clock on / clock off allows you to record actual time against a job. You can also mark a job as complete.

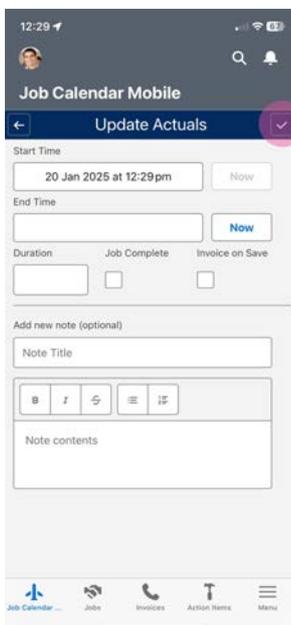
Time logging



Tap the clock or the time to:

- » Clock time-on
- » Clock time-off
- » Record duration
- » Mark job as complete
- » Add a note

Clock-on

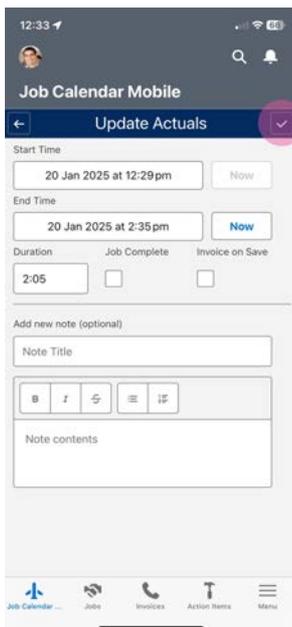


Press the **Tick** button to clock on with the current time.

To clock on with a different time, tap the **Start Time** field to select the actual start time before pressing **Tick**.

Once you have clocked on, Job Calendar Mobile will show an Orange clock icon.

Clock off

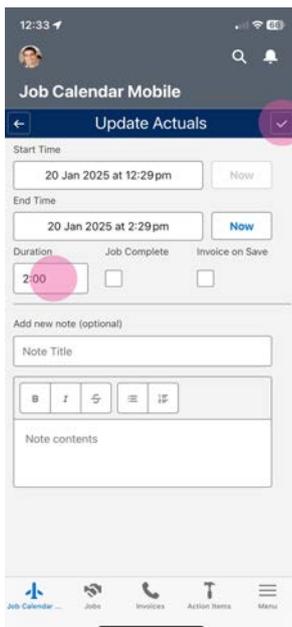


After you have finished the Job, press the **Tick** button to clock off with the current time.

To clock off with a different time, tap the **End Time** field to select the actual end time before pressing **Tick**.

Once you have clocked off, Job Calendar Mobile will show a Green clock icon.

Duration

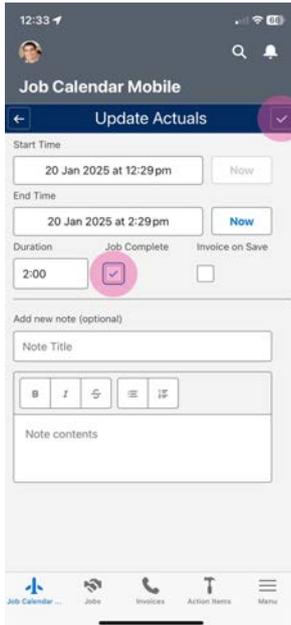


Instead of recording start and end times, you can choose to simply record duration.

To do this, enter into **Duration** either hh:mm or decimal values.

Press **Tick** when complete.

Job complete



The screenshot shows the 'Update Actuals' screen in the Job Calendar Mobile app. The interface includes the following elements:

- Start Time: 20 Jan 2025 at 12:29 pm (with a 'Now' button)
- End Time: 20 Jan 2025 at 2:29 pm (with a 'Now' button)
- Duration: 2:00
- Job Complete: (highlighted with a pink circle)
- Invoice on Save:
- Add new note (optional):
 - Note Title: [Text input field]
 - Rich text editor with icons for bold, italic, strikethrough, list, and link.
 - Note contents: [Text area]
- Bottom navigation bar: Job Calendar, Job, Invoices, Action Items, Menu

When the Job is finished, you can then mark the job as complete.



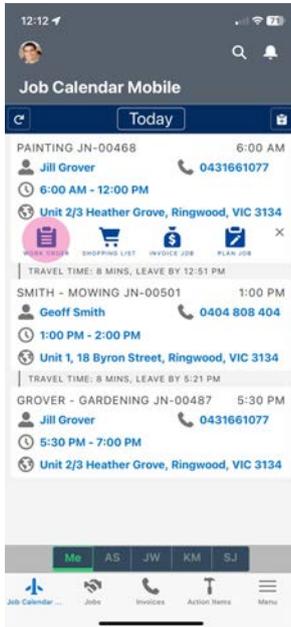
When a job is marked as complete, it will show as complete on all events linked to the job.

Viewing a work order

You can view a job's work order by clicking on the work order button.

Work order

Tap to view the work order.

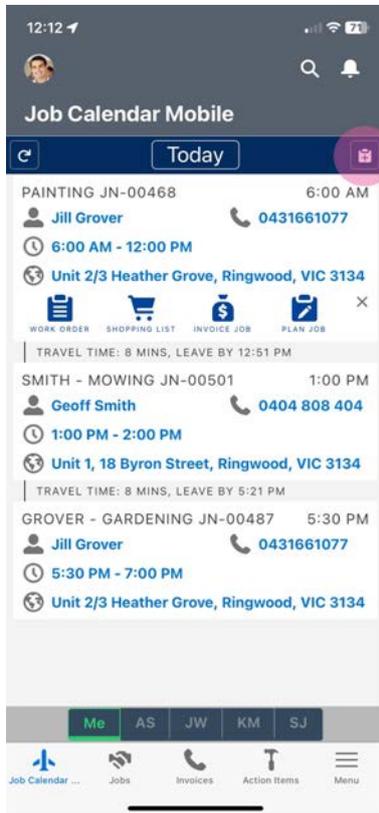


Creating a quick job

You can rapidly add a new customer with a job and appointment while on mobile.

To create a quick job

1. On Job Calendar Mobile, tap the Quick Job  button.



2. Complete the form, then press **Submit**.

The screenshot shows the 'Job Calendar Mobile' app interface. At the top, the time is 3:31 and there are icons for search and notifications. The app title 'Job Calendar Mobile' is displayed. Below the title, there are two input fields for names: 'Emily' and 'Howard'. A phone number field contains '0421756821'. An email field contains 'eh@gmail.com'. A street address field contains '19 Rainbow Street'. Below that, there are fields for 'Springsure' and 'QLD'. Further down, there are fields for '4722' and 'Australia'. A 'Patch hole' field is followed by a price field containing '\$70.00'. There are two sections: 'Scheduled for' with a date and time '17 Jan 2025 at 3:00 pm', and 'Duration' with a value of '0.50'. A rich text editor with formatting icons (bold, italic, underline, list, link, unlink) is present, containing the text '50mm x 50mm hole in plaster'. At the bottom of the form are 'Submit' and 'Cancel' buttons. The app's bottom navigation bar includes icons for 'Job Calendar ...', 'Jobs', 'Invoices', 'Action Items', and 'Menu'.



The system will check for a duplicate account, and, on not finding one, create the account, job (including job line) and appointment.



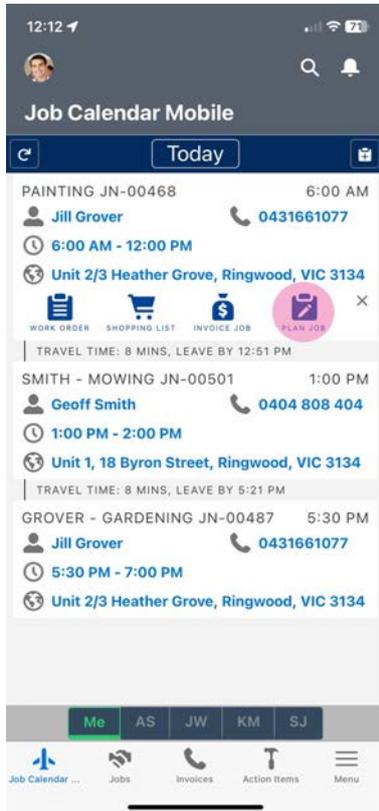
On record creation, the system presents the Quick Quote page to you. You can optionally generate and then send the quote to your new customer, See “Creating a quick quote” on the next page.

Creating a quick quote

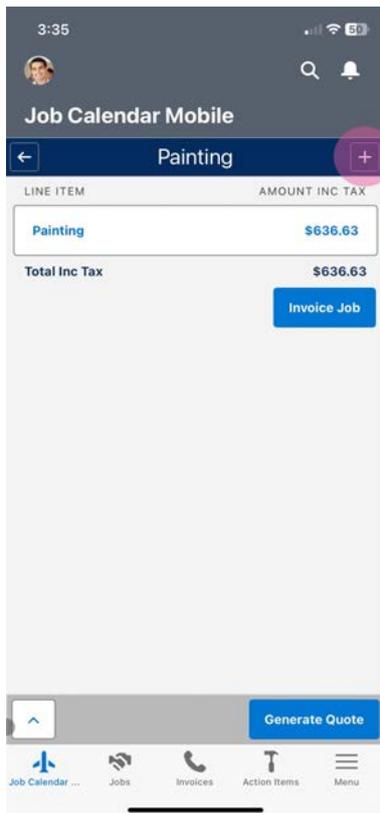
You can rapidly create and send a quick quote while on a job. This will allow you to provide a quote to a customer with the potential to have it accepted instantly.

To create a quick quote

1. On Job Calendar Mobile, tap the event's **Quote**  button.



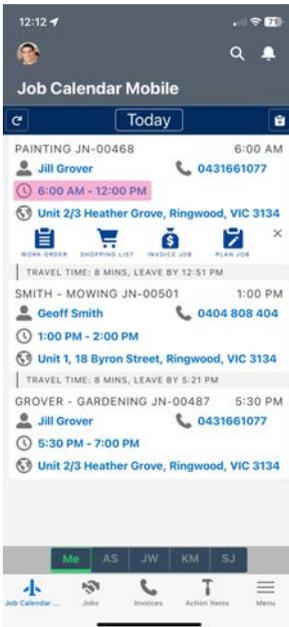
2. Press the **Plus** button to add a new line.



3. Enter the Short Line Description.
4. Set the price for labor using the Labour Override.
5. Set the price for material using the Material Override.
6. Optionally add a Detailed Description.
7. If this is the final line, press **Save**. If you need to add another, press **Save and New**.
8. When you return to the Quick Quote, the Quote Preview will appear. Press **Generate Quote** to send the quote to the customer.

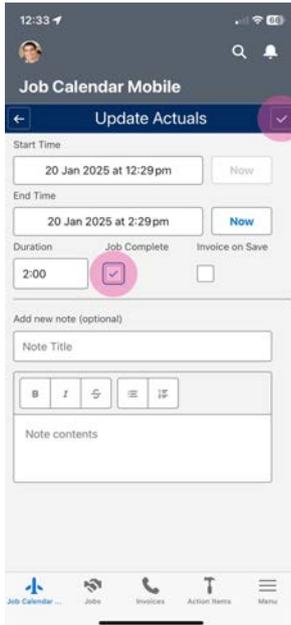
Marking a job as complete

Time logging



Tap the clock or the time to mark job as complete.

Job complete



The screenshot shows the 'Update Actuals' screen in the Job Calendar Mobile app. The status 'Job Complete' is checked, indicated by a pink circle around the checkbox. The start time is '20 Jan 2025 at 12:29 pm' and the end time is '20 Jan 2025 at 2:29 pm'. The duration is '2:00'. There is a 'Note Title' field and a 'Note contents' area below it. The bottom navigation bar includes icons for Job Calendar, Job, Invoices, Action Items, and Menu.

Check the **Job complete** checkbox.

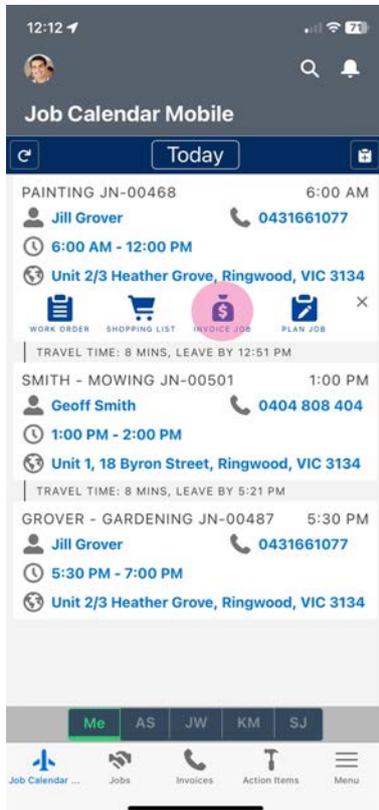
When a job is marked as complete, it will cause the job to transition to a new **Status** (e.g. Invoice) and will show as complete on all events linked to the job.

Invoicing a job

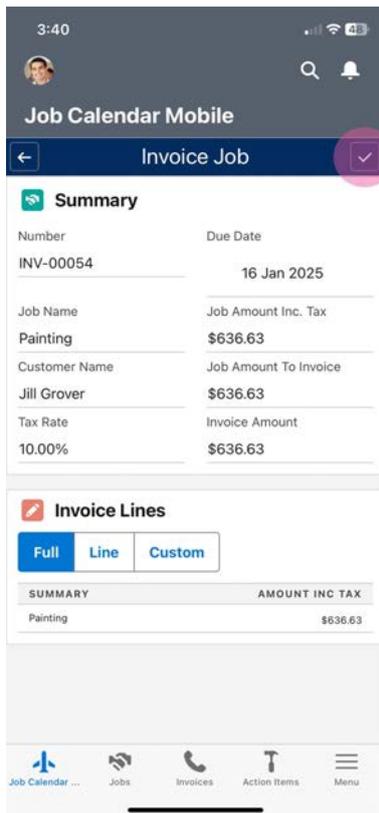
When you have completed a job you can generate the invoice right on your mobile device.

To generate an invoice on a mobile

1. From the appointment in Job Calendar Mobile, tap Invoice Job.



2. From the Invoice Job page, tap the tick.



Congratulations

You have now generated an invoice. From here, you can:

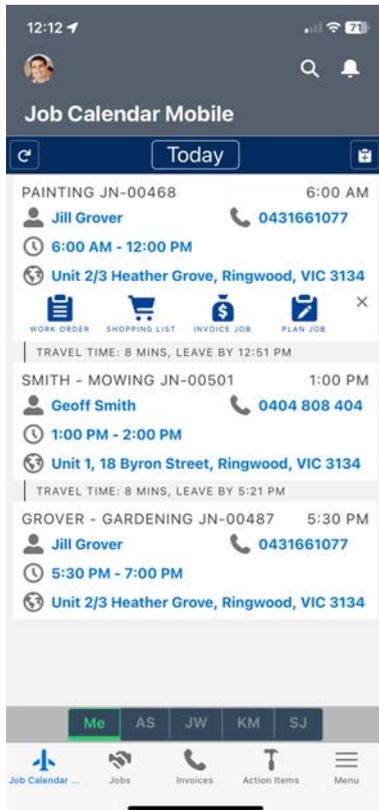
- » Take payment by card or cash.
- » Send the customer an email with an attached invoice PDF.

Changing an appointment

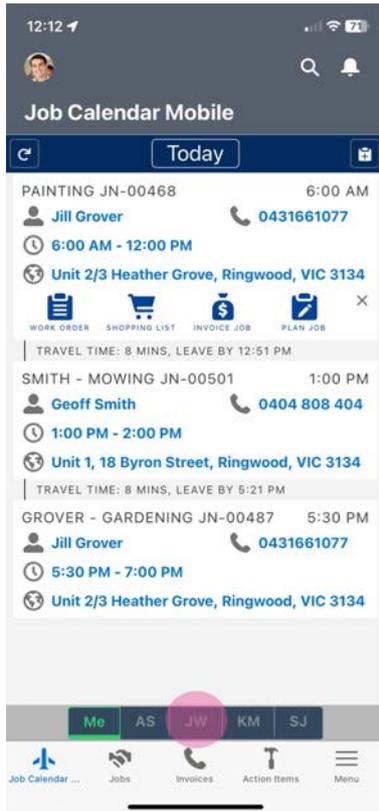
When you're on the road, you will often need to tweak your schedule. You can always modify the expected start times of appointments.

To change an appointment

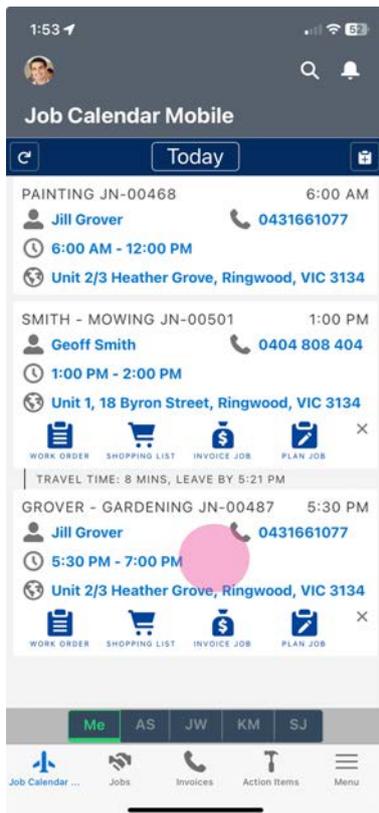
1. The first page of Salesforce Mobile shows your current day's Schedule.



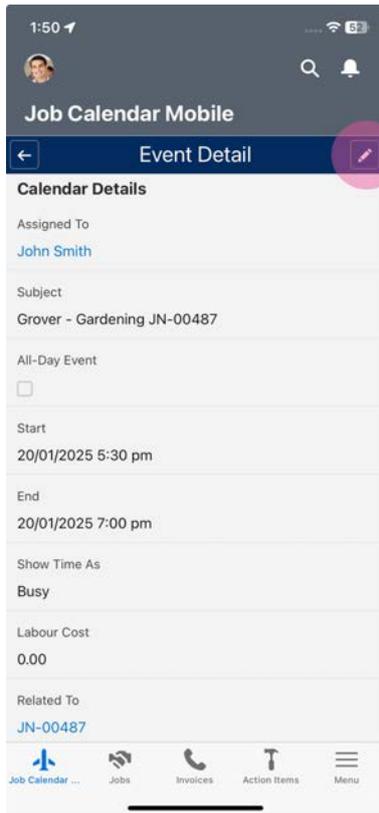
2. You can see the daily schedule of any of your resources by pressing their resource alias.



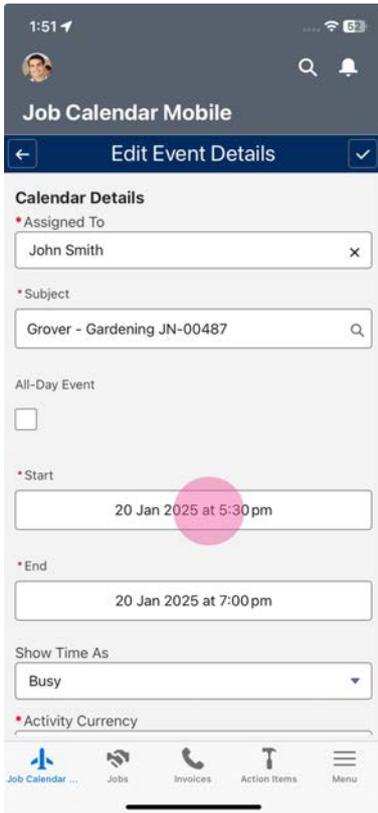
3. To modify an appointment tap the white space on the event.



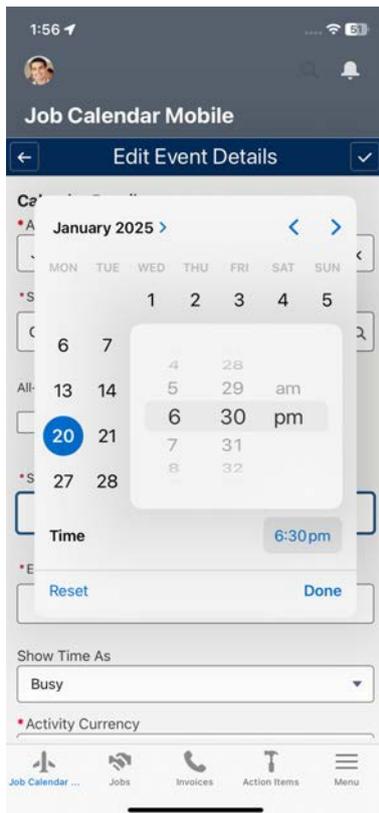
4. The **Event Detail** page appears. Click the **Edit** button.



5. Now press the Start field.



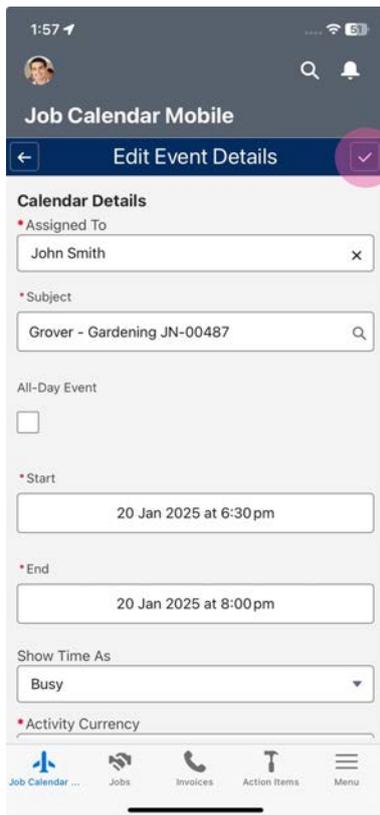
6. Change the appointment start to your desired time.



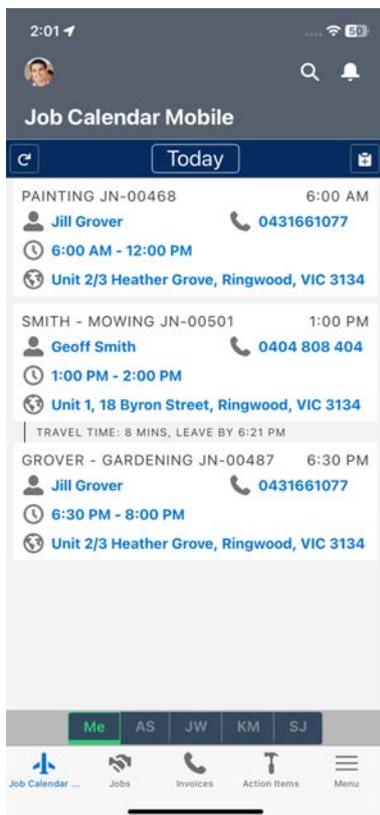
Changing the start time will move the entire appointment.

This is really handy because the most common action is simply to delay the start of an appointment while on the road. To actually change the length of the appointment, you will need to change both the `Start` and the `End` time.

7. When you are finished editing the appointment, press the **Tick** button.



8. On pressing the **Tick** button, the system will show you your revised schedule.

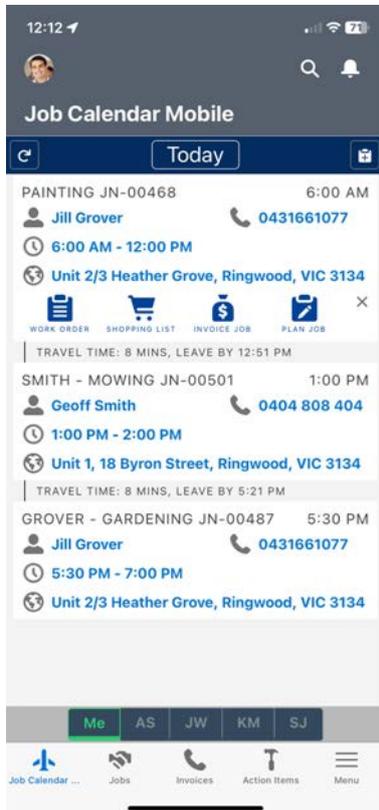


Scheduling a job

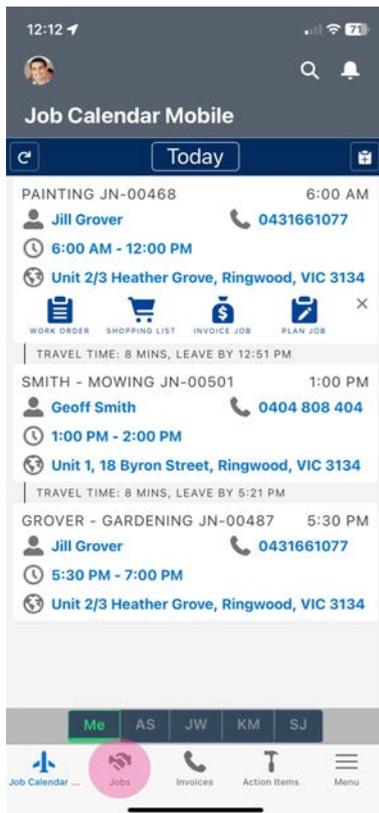
During the day you will sometimes need to squeeze in another appointment. To do this, you can schedule an appointment from the Job directly in Salesforce Mobile.

To schedule an appointment

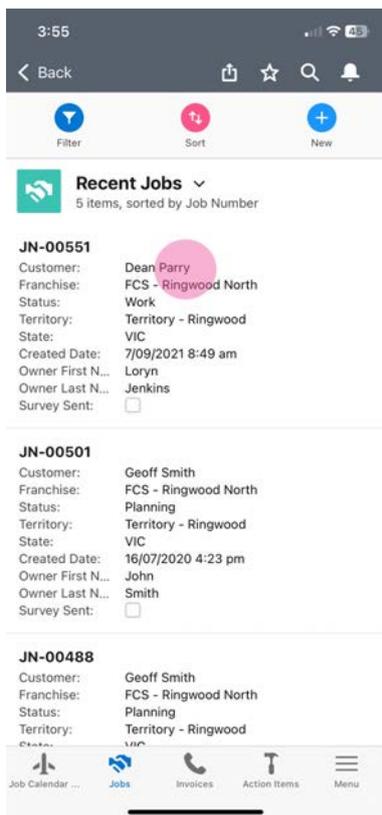
1. The first page of Salesforce Mobile shows your current day's Schedule.



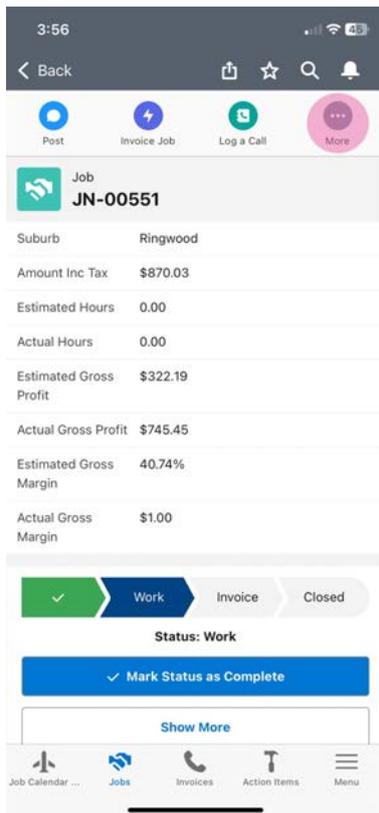
2. Choose Jobs.



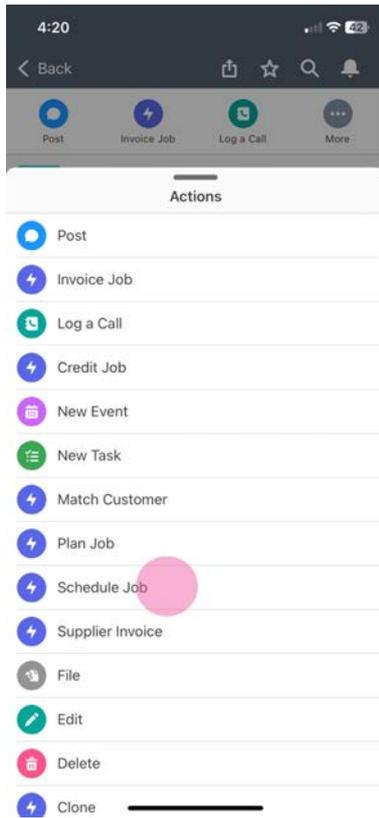
3. From the **Jobs** list page, select the desired **Job**.



4. From the menu buttons at the top of the page, choose **More**.



5. Select Schedule Job.



- From the **Schedule Job** page, set the Start Date Time and End Date Time, then press **Save**.

4:24

16 Jan 2025

* Subject Type

Domestic window cle: Doing the Job

Location

12 Wonga Road, Ringwood, 3134, VIC

Duration in Hours

1

* Start Date Time

16 Jan 2025 at 5:00 pm

* End Date Time

16 Jan 2025 at 6:00 pm

B I U S | | | |

| | |

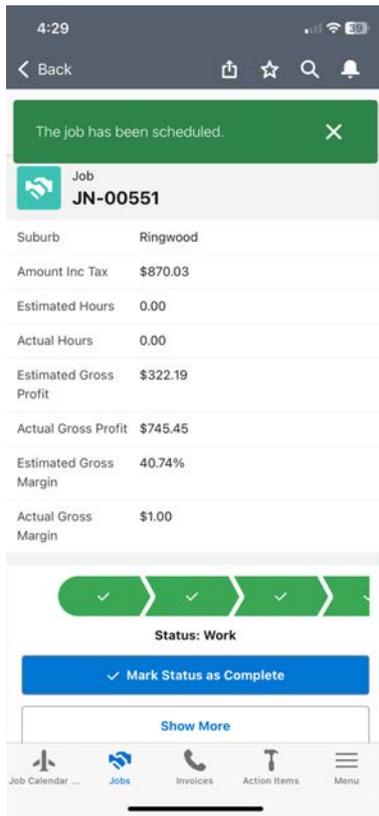
Domestic window cleaning

Job Description
Ground floor only.
Inside and out.
\$150 - \$200.

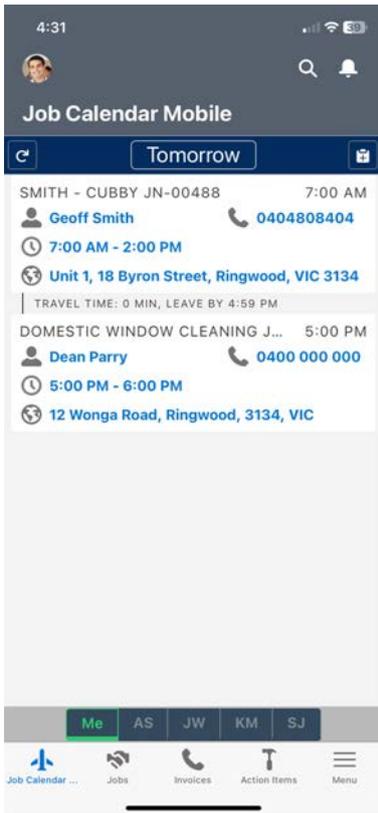
Work Order Description
Access info
Contact name
If not home start on outside.

Cancel Save

7. The system will show that the Job has been saved. You can then click the **Jobs** button, the **Back** button, or the **Job Calendar Mobile** menu item to arrive back at the Job Calendar Mobile page.



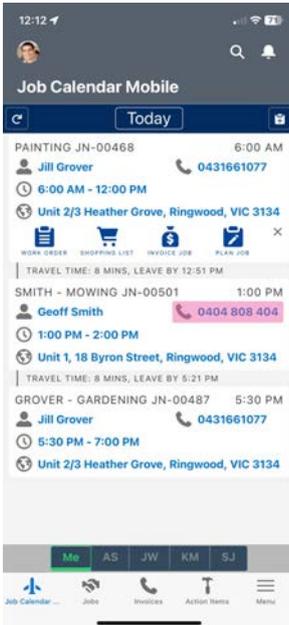
8. The system shows you your updated daily schedule.



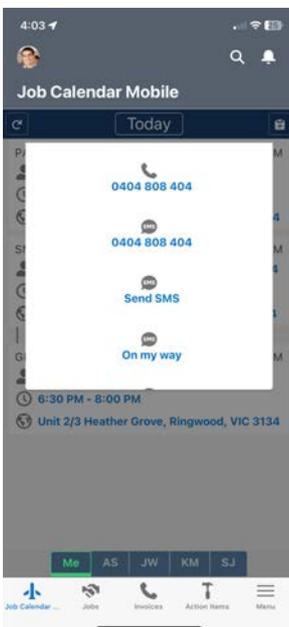
Contacting the customer

Often you'll want to contact a customer when their appointment is approaching. Perhaps you've agreed to notify them when you're on your way, or you need to let them know you've been delayed, or you need to speak with them. Whatever the case may be, so long as you've captured their mobile phone number, you'll be able to contact them in the quickest possible way.

To place a call or send an SMS

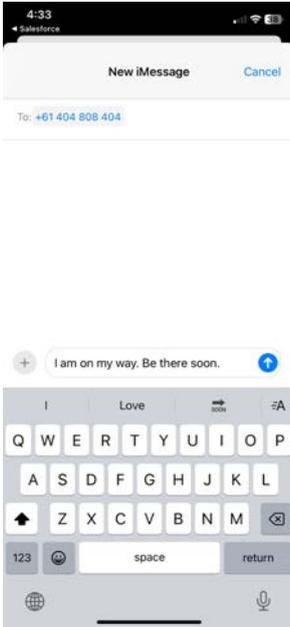


Tap on the customer's mobile phone number.



A menu appears, showing the available phone or SMS links, plus a list of commonly-used template SMSs.

Tap the most useful link.



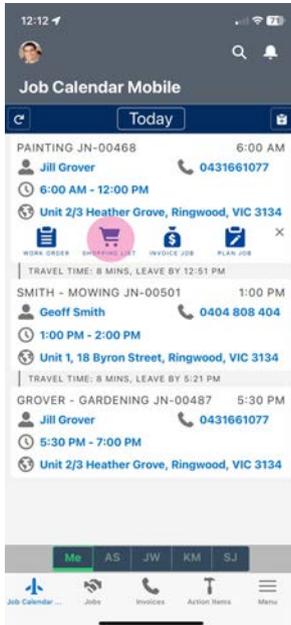
Once you have made your choice, the system transfers you to your phone or SMS app to complete the communication.

Viewing the shopping list

When a job contains items that appear on the shopping list, a shopping list icon appears on the Job Calendar Mobile event. You can tap the icon to view the shopping list.

Shopping list

Tap to view the shopping list.



You can choose to filter the shopping list by job or supplier.

You can check each item as you purchase it.

Logging a call

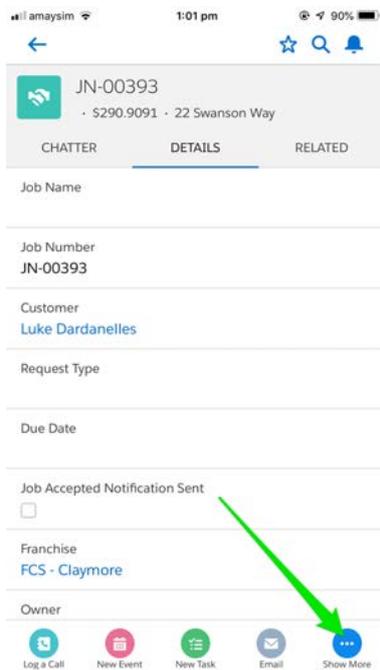
To log a call

1. From the Job, press the **Log a Call** button.
2. Record your notes.
3. Press **Save**.

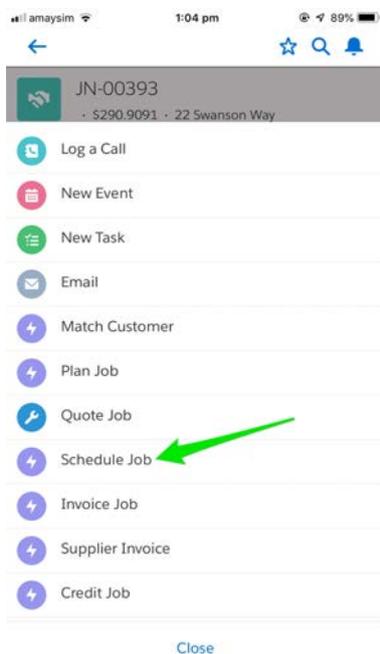
Rapid job scheduling

To schedule a job using Salesforce mobile

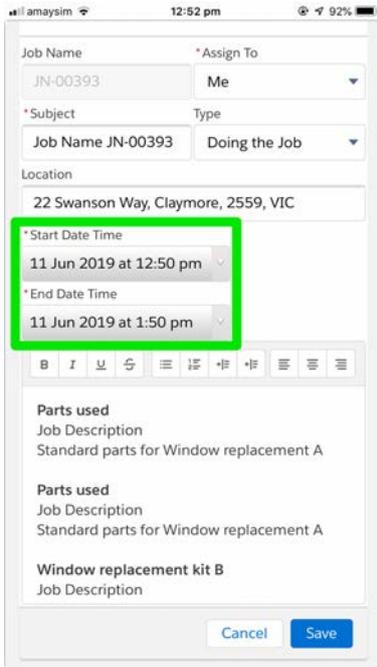
1. From the Job page, press Show more.



2. From the menu, select Schedule Job.

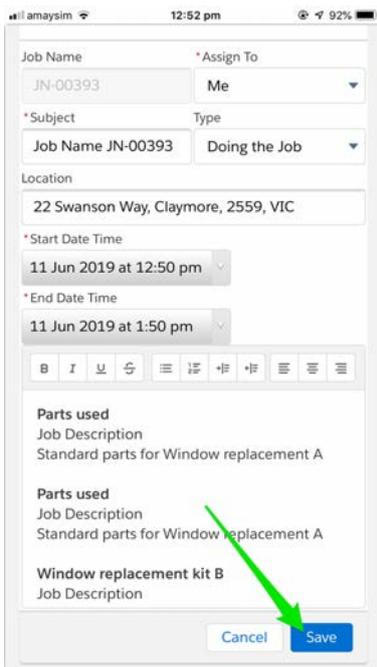


3. From the Schedule Job page, enter the **Start Date Time** and **End Date Time**.



The screenshot shows a mobile application interface for scheduling a job. The top status bar displays 'amaysim', '12:52 pm', and '92%' battery. The form includes the following fields: 'Job Name' (JN-00393), '*Assign To' (Me), '*Subject' (Job Name JN-00393), and 'Type' (Doing the Job). The 'Location' is '22 Swanson Way, Claymore, 2559, VIC'. The '*Start Date Time' is '11 Jun 2019 at 12:50 pm' and the '*End Date Time' is '11 Jun 2019 at 1:50 pm'. These two time fields are highlighted with a green rectangular box. Below the time fields is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and image. The text area contains three sections: 'Parts used' with 'Job Description' and 'Standard parts for Window replacement A', another 'Parts used' section with the same description, and 'Window replacement kit B' with 'Job Description'. At the bottom are 'Cancel' and 'Save' buttons.

4. Review the other information. When correct, press **Save**.



This screenshot is identical to the previous one, showing the same form with the time fields highlighted. In this view, a green arrow points to the 'Save' button at the bottom right of the form, indicating the next step in the process.

The Event will now appear within **Job Calendar** and **Job Calendar Mobile**.

Business Manage... Home Chatter Accounts Contacts Jobs Job Offers Job Schedule Invoices Payments Customer Feedback Material Price Lists Reports Dashboards Calendar More

JobCalendar
Viewing Calendar For John Smith

Search Jobs
Search term
Job Number or Job Name... Search

Showing first 25 results. [Show more](#)

- > JN-00393
Claymore
- > JN-00400
Lock Replacement, Claymore
- > JN-00401
Patio Construction - Dardanelles, Claymore
- > JN-00403
Claymore
- > JN-00398
Claymore
- > JN-00394
Window Replacement - Dardanelles, Claymore
- > JN-00395
Lock Replacement - Dardanelles, Claymore
- > JN-00391
Replac window, Dardanelles, Claymore
- > JN-00152
Bondi
- > JN-00245
Cahill - Regrout Kitchen, Balmain
- > JN-00142
Renovations, Tim Smith, Bondi

Today Jun 09 - 15, 2016

all-day	Sun 9/6	Mon 10/6	Tue 11/6	Wed 12/6	Fri 14/6	Sat 15/6
7am						
8am						
9am						
10am						
11am						
12pm						
1pm			1:56 - 1:58 Job Name: JN-00393 22 Swanson Way, Claymore, 2559.			
2pm						
3pm						
4pm						
5pm						
6pm						

Read Only Hours Logged On Site Breaks

Taking notes, photos and videos in the field

You can take notes in the field through

- » entering text on your phone
- » dictation (with automatic conversion to text)
- » filming video with verbal commentary

To take notes in the field

1. Set up your iOS device for automatic dictation.

a. Select **Settings**.



b. Select **General**.



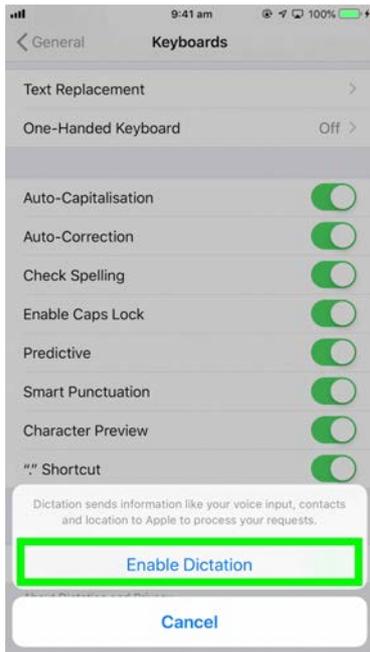
c. Select Keyboard.



d. Press Enable Dictation.

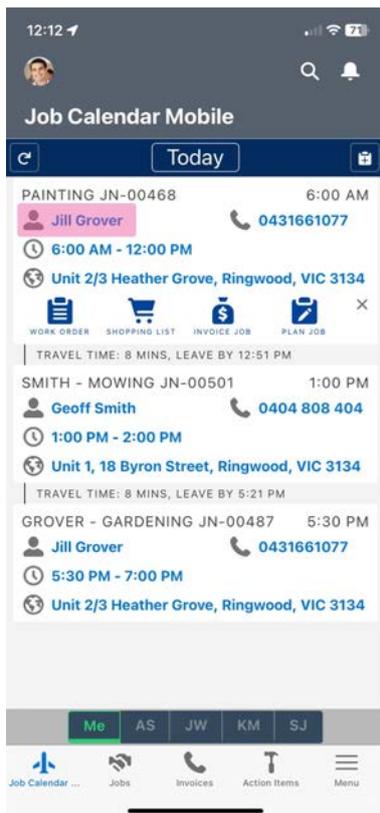


e. Confirm Enable Dictation.

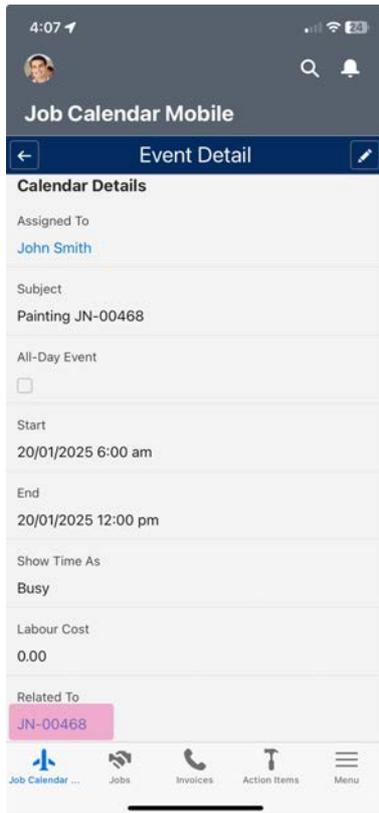


f. You are now ready to use your system as a dictation device.

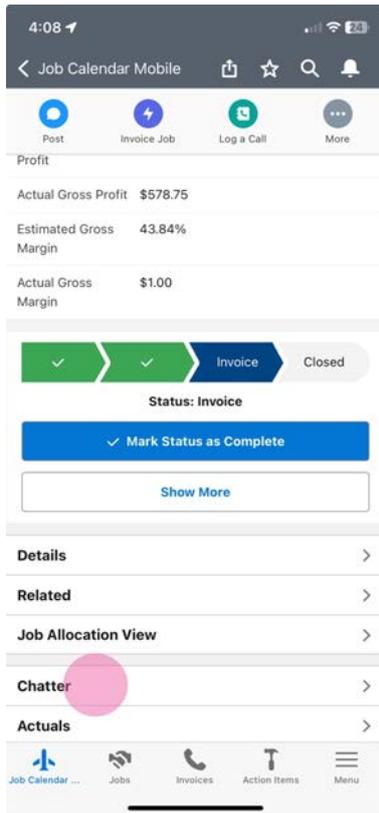
2. From the event summary, tap on the person's name.



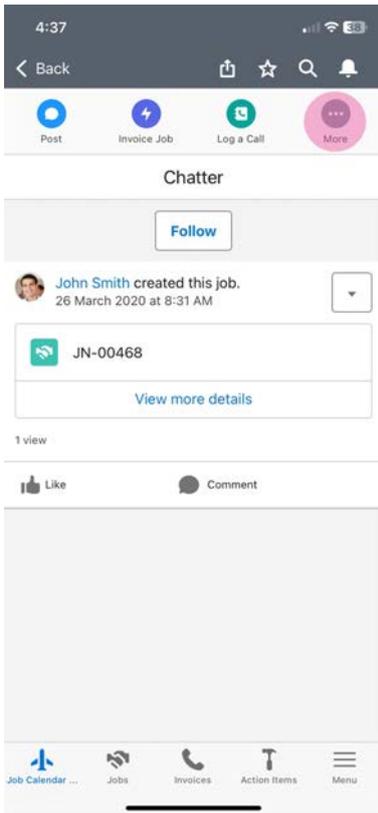
3. From the **Event Detail** screen, tap the Job number.



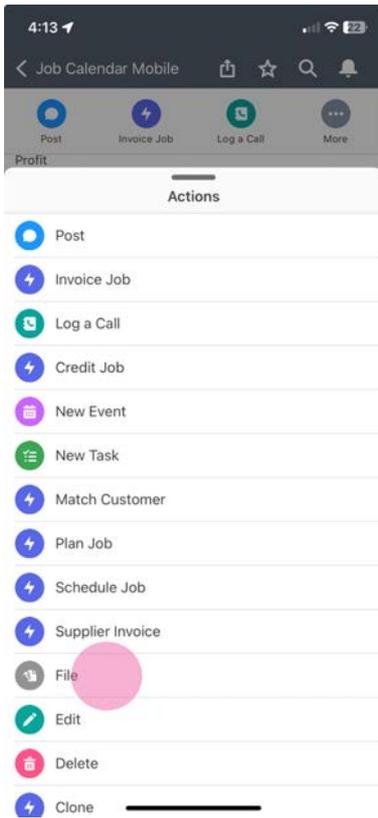
4. From the Job, tap the Chatter tab.



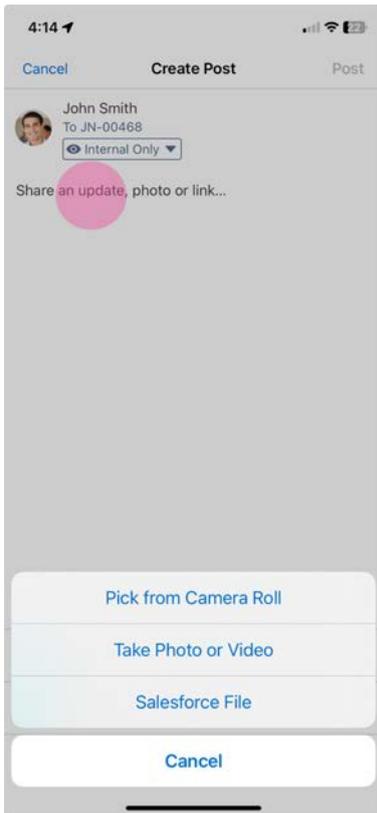
5. From the Chatter page, click the More button.



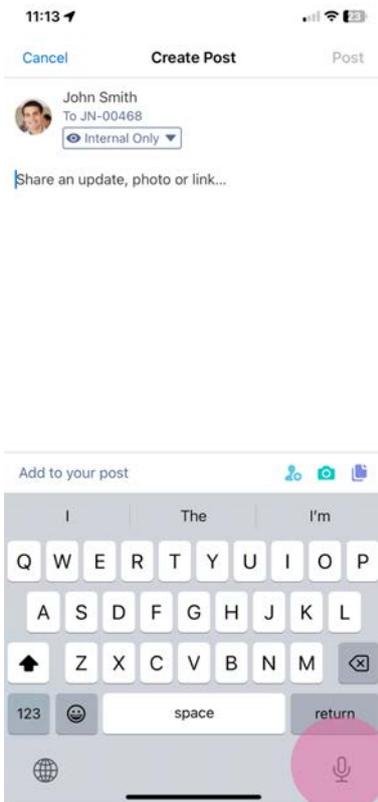
6. Tap File.



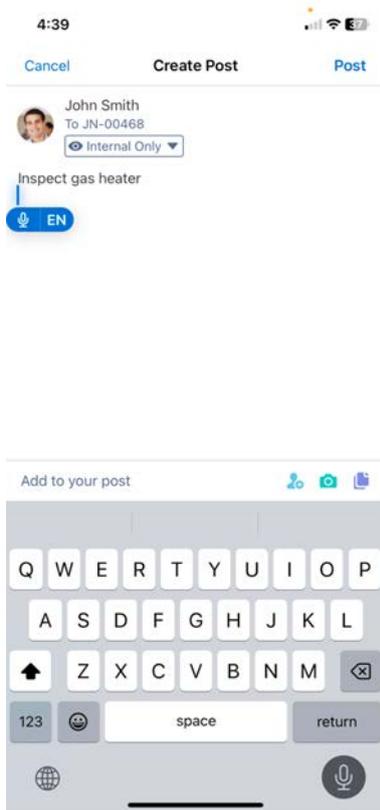
7. From the **Chatter** page, click on the default text in the Post.



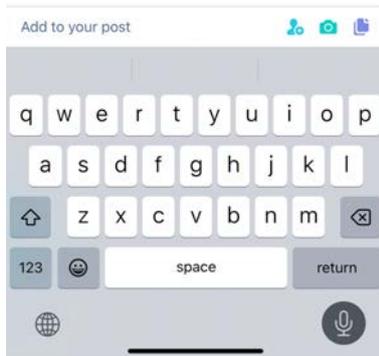
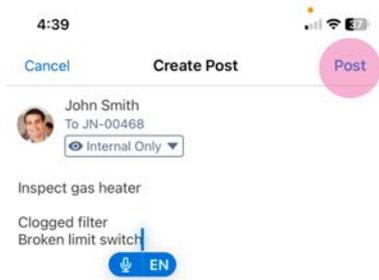
8. From the on-screen keyboard, tap the **Microphone** button.



9. Now dictate your note.

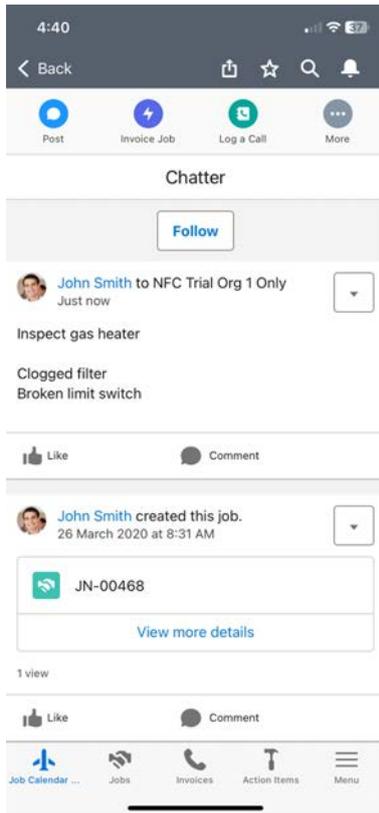


10. When you are finished, press the **Post** button.



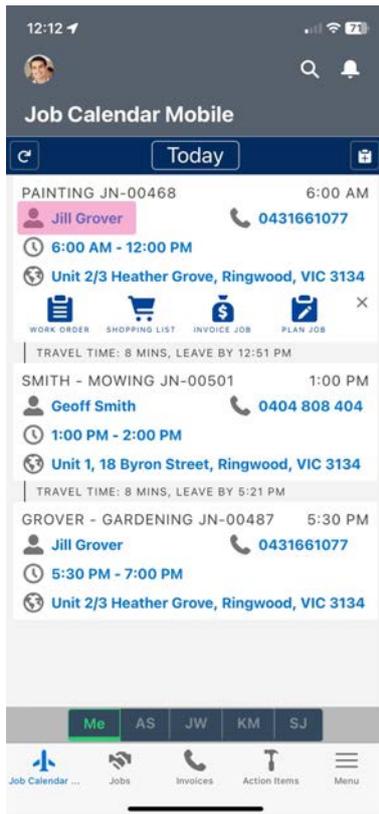
To end a sentence, say "Period"
For a new line, say "New line"
For a new paragraph, say "New paragraph"

11. The note is now added to the Chatter feed.

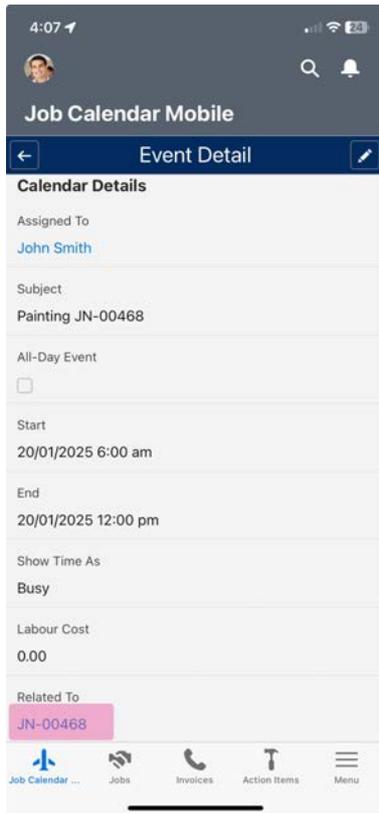


To record a video note

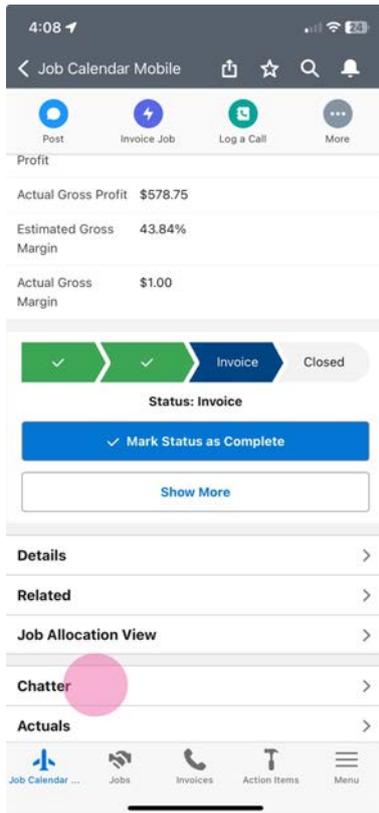
1. From the event summary, tap on the person's name.



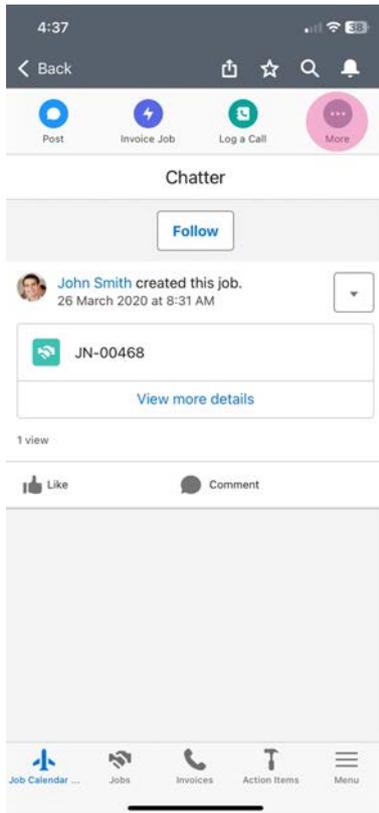
2. From the **Event Detail** screen, tap the Job number.



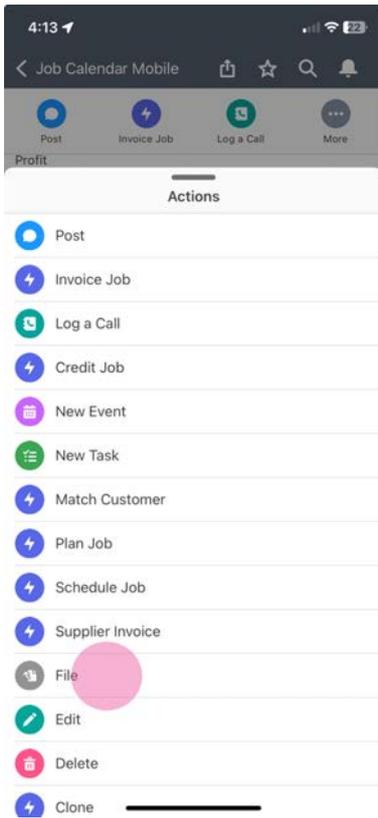
3. From the **Job**, tap the **Chatter** tab.



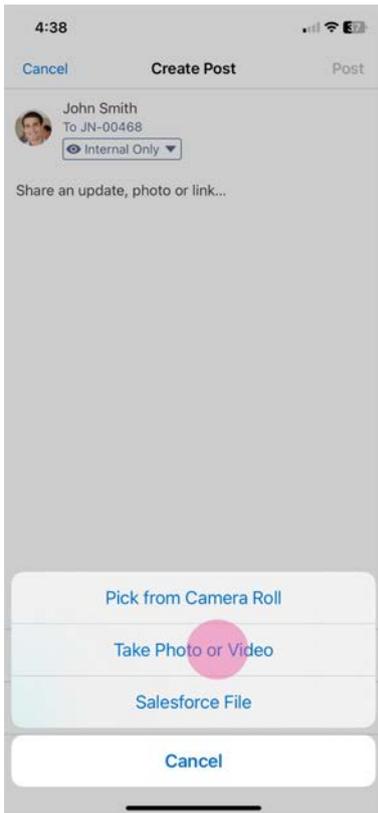
4. From the Chatter page, click the More button.



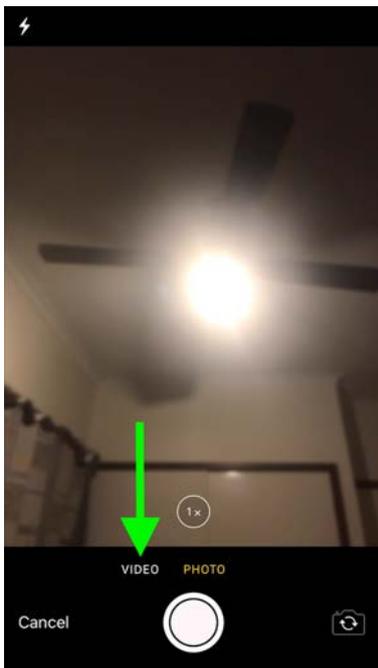
5. From the Chatter page, click the File button.



6. From the menu, select **Photo / Video**.



7. From the camera, select **Video**.



8. Press the **Start Record** button. Record your video and narrate your note.



9. When finished, press the **Stop Record** button.



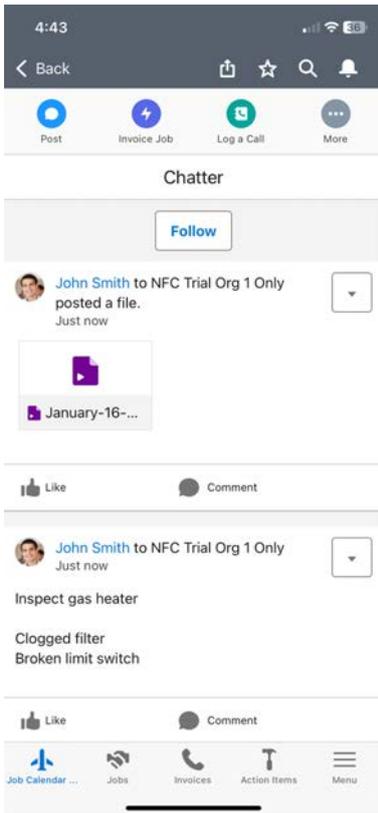
10. Press the **Use Video** button.



11. When you are finished, press the **Post** button.



12. The note is now added to the Chatter feed.



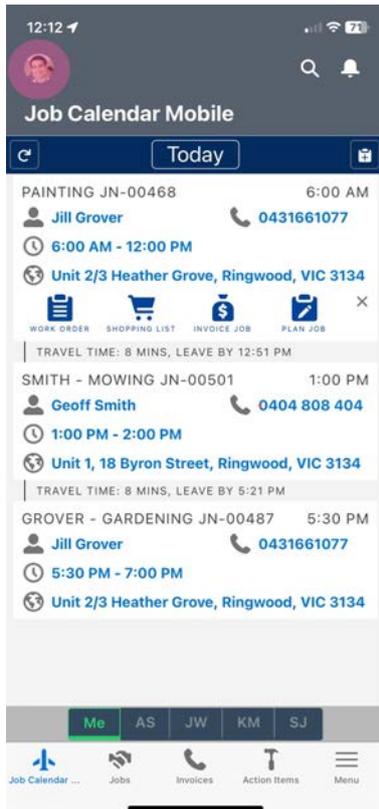
Clearing cached screens and data

To minimize downloads, the Salesforce mobile app aggressively caches screens and data. This works really well but can delay seeing changes around software updates.

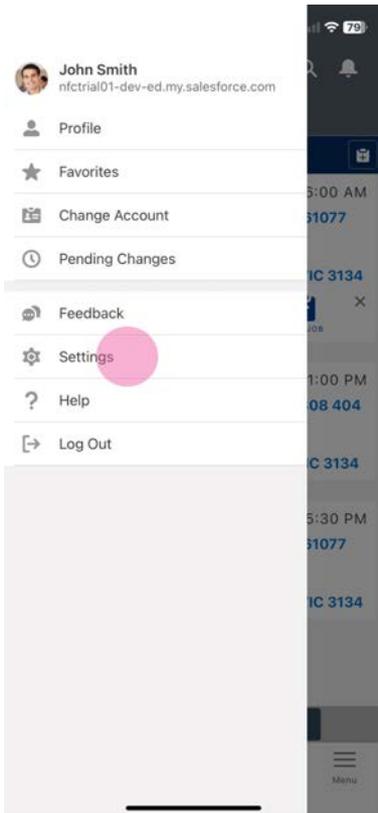
If you know there has been a software update, you may want to clear the cache to see the updated screens.

To clear cached screens and data

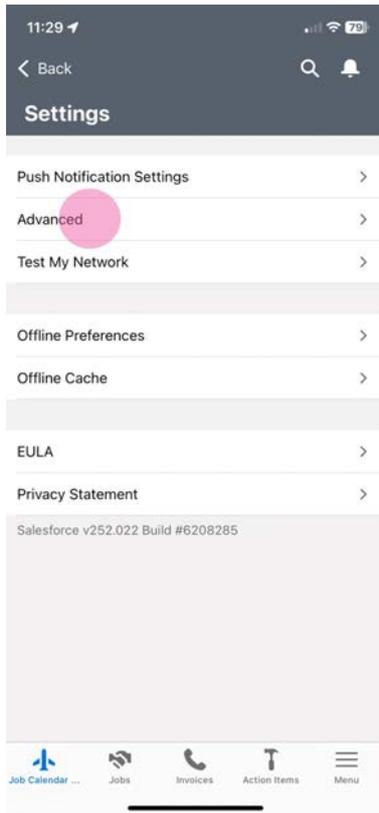
1. From Job Calendar Mobile, tap the user icon.



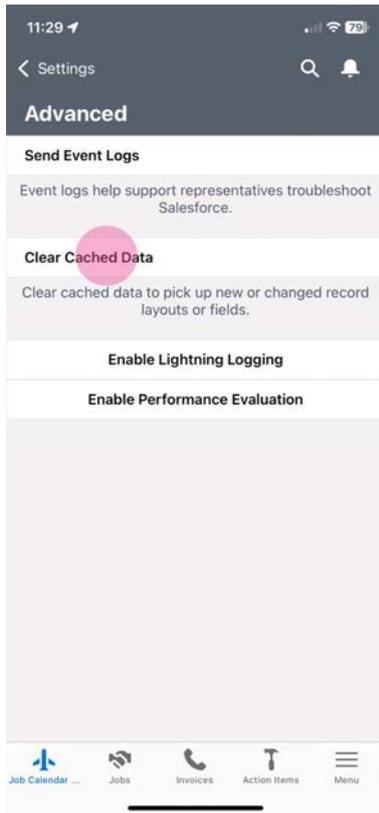
2. Then tap **Settings**.



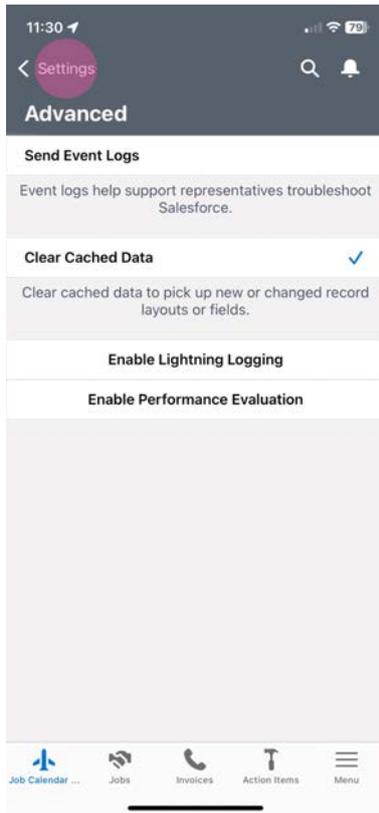
3. Now tap **Advanced**.



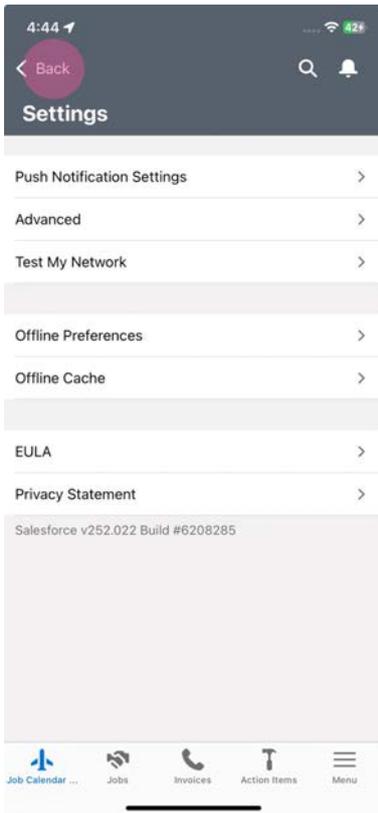
4. Tap the **Clear Cached Data** button.



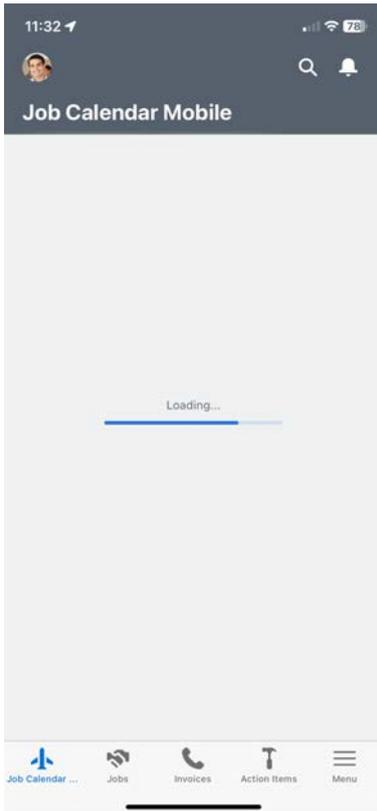
5. Now you can return to the home screen. Tap **Settings**.



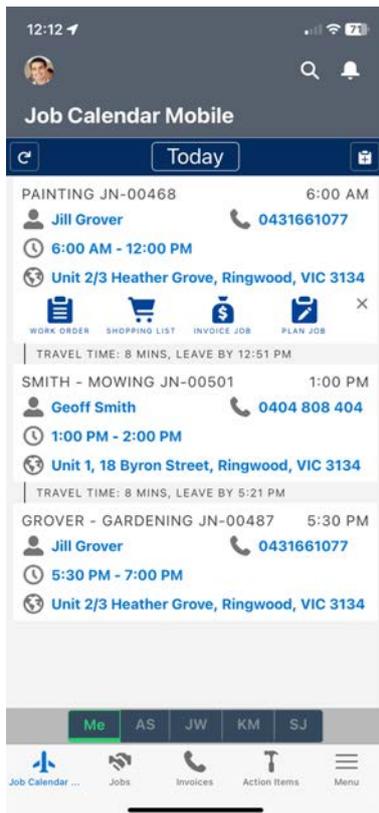
6. Now tap **Back** or **Job Cal Mobile**.



- Note that Salesforce is loading. This is a sign your cache has been successfully cleared.



8. And you're done.



CHAPTER 11

Customer Communications

Working with customers on the phone	ccclxvi
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How to capture the outcomes of phone calls	ccclxxii
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How to set up an email signature block	ccclxxix
How to review email template headers and footers	ccclxxxii
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Granting EAC sync permission	cdi
Installing the Salesforce extension for Office 365	cdi

Installing the Chrome Salesforce extension for GSuite	cdvii
Logging email using Salesforce extensions	cdxi
Logging events using Salesforce extensions	cdxiii

Working with customers on the phone

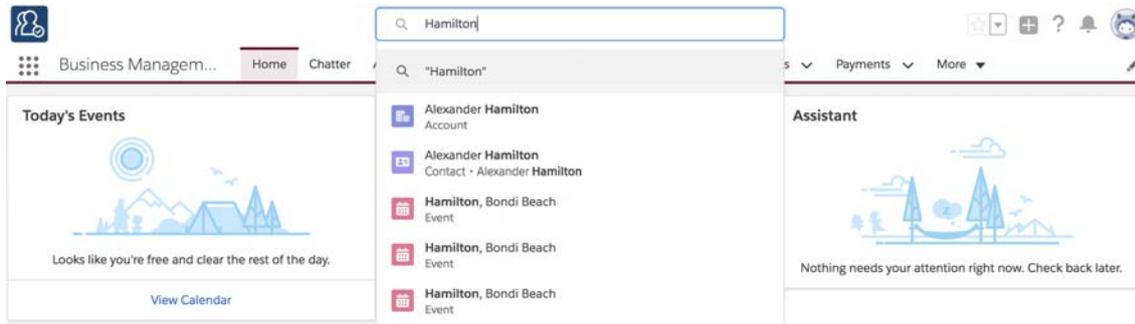
Business Management provides a range of tools for franchisees to be able to quickly and easily field customer requests. The following topics deal with a range of tasks common to Job, Account or Contact records, encompassing taking notes, creating follow up tasks, sending emails, and scheduling meetings.

How to locate the right record

When a customer not new to your business contacts you, you need to locate the right record so that you can record new information and update existing information in the right place.

To locate a person's record

1. Ask for the person's name. Enter their name into the Salesforce search box.



Salesforce displays a list of records that match the name you entered. The type of each record is displayed.

2. If you see a corresponding **Account**, select the account.



If you do not see the person's account, go to step 5.

Within the **Account**, you have access to all their recent details and preferences.

The screenshot displays a user interface for managing customer accounts. At the top, there is a navigation menu with options like 'Business Management...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. A search bar contains the text 'hamilton'. Below the navigation, the account details for 'Mr. Alexander Hamilton' are shown, including contact information (phone, email), address, and invoice summary. The 'DETAILS' tab is active, showing fields for Account Name, Title, Mobile, Home Phone, Birthdate, Next Review Due Date, Address Information, and Invoice Summary Information. The 'ACTIVITY' tab is also visible, showing a timeline of events and past activities.

- » Name and contact details
- » Address information
- » Summary of invoices and payments owing
- » Marketing information and communication preferences

3. To see current and historical jobs, select the **Related** tab.

The screenshot displays the Business Management interface for the account of Mr. Alexander Hamilton. The top navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. The account details section shows contact information and the account owner, Simon Walker. The 'RELATED' tab is active, showing three sections: 'Jobs (2)', 'Customer Feedback (0)', and 'Invoices (1)'. The 'Jobs' section contains a table with two entries: JN-00161 (Hamilton, Bondi Beach, FCS Bondi Beach, Closed) and JN-00171 (Roofing, Bondi Beach, FCS Bondi Beach, Assigned). The 'Invoices' section shows one invoice: INV-00009 (12/04/2018, Open, Full). The 'ACTIVITY' tab on the right shows a 'Next Steps' section with a task 'Wants to organise an i...' and a 'Past Activity' section with two entries: 'Additional meet...' and 'Returned your call'.

Account: Mr. Alexander Hamilton

Title: Phone(2) 0431661889 | Email: alex.hamilton@gmail.com.au | Account Owner: Simon Walker

RELATED

Jobs (2)

JOB NUMBER	JOB NAME	FRANCHISE	STATUS
JN-00161	Hamilton, Bondi Beach	FCS Bondi Beach	Closed
JN-00171	Roofing, Bondi Beach	FCS Bondi Beach	Assigned

Invoices (1)

INVOICE NUMBER	INVOICE DATE	STATUS	TYPE
INV-00009	12/04/2018	Open	Full

ACTIVITY

Next Steps

- Wants to organise an i... 30/04
You have an upcoming Task with Alexander Hamilton about JN-00171

Past Activity

- Additional meet... 4:31 PM | Yesterday
You sent an email to Alexander Hamilton
- Returned your call Yesterday
You logged a call with Alexander Hamilton about JN-00171

4. If the inquiry relates to a job you can reach the record by clicking on the record number.

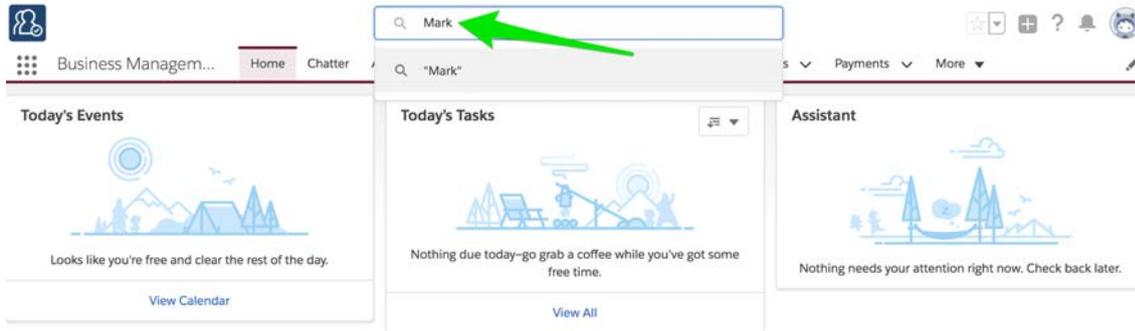
The screenshot shows a CRM interface for an account named Mr. Alexander Hamilton. The account owner is Simon Walker. The interface is divided into several sections:

- Account Information:** Title, Phone(2) 0431661889, Email alex.hamilton@gmail.com.ux, Account Owner Simon Walker.
- RELATED:**
 - Jobs (2):** A table with columns: JOB NUMBER, JOB NAME, FRANCHISE, STATUS. The second row is highlighted with a green arrow pointing to the job number JN-00171.

JOB NUMBER	JOB NAME	FRANCHISE	STATUS
JN-00161	Hamilton, Bondi Beach	FCS Bondi Beach	Closed
JN-00171	Roofing, Bondi Beach	FCS Bondi Beach	Assigned
 - Customer Feedback (0)**
 - Invoices (1):** A table with columns: INVOICE NUMBER, INVOICE DATE, STATUS, TYPE. The first row is highlighted.

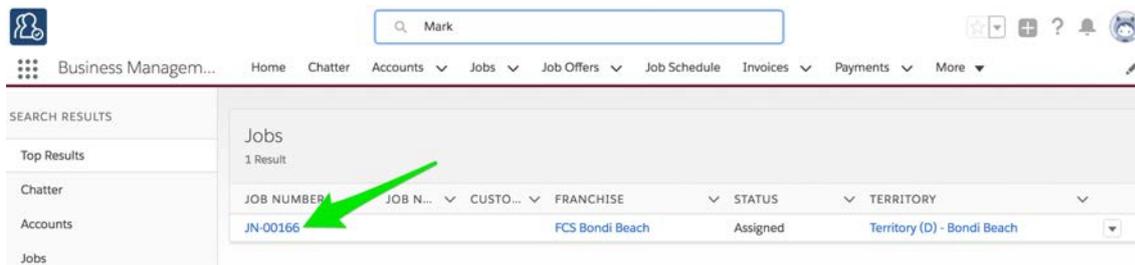
INVOICE NUMBER	INVOICE DATE	STATUS	TYPE
INV-00009	12/04/2018	Open	Full
 - Files (0)**
- ACTIVITY:**
 - New Event:** New Task, Email. Create new... Add
 - Activity Timeline:** Expand All
 - Next Steps:** More Steps
 - Past Activity:**
 - Wants to organise an i... 30/04. You have an upcoming Task with Alexander Hamilton about JN-00171.
 - Additional meet... 4:31 PM | Yesterday. You sent an email to Alexander Hamilton.
 - Returned your call Yesterday. You logged a call with Alexander Hamilton about JN-00171.

5. If you have searched for a person's name and do not find them ...



... press the Enter key on your keyboard.

The search results page displays.



Sometimes you can find new jobs on the **Search Results** page that do not appear in the quick search results.

6. See the job record by clicking on the Job Number.
7. If the person's name does not appear, then they are likely a new customer.
- 8.



Just double-check you're not misspelling their name.



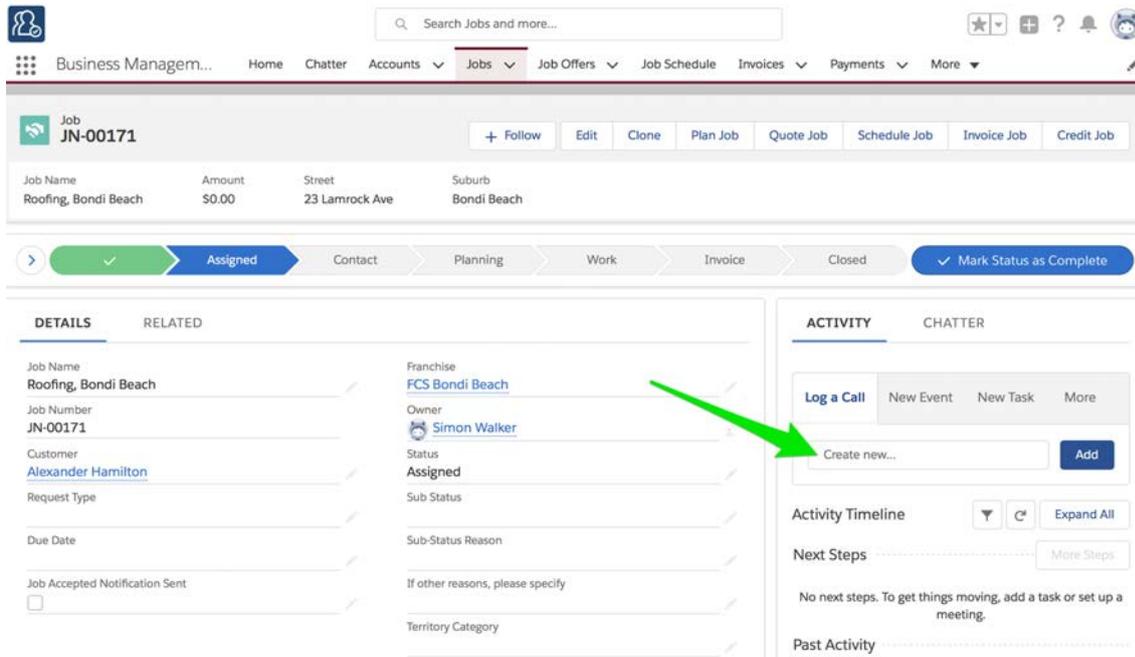
To enter new customers, See "How to create an account for an individual customer" on page lxxix or See "How to create an account for a business" on page lxxx.

How to capture the outcomes of phone calls

When a customer calls and leaves a message, sometimes you just need to record information and other times someone needs to follow up the call.

To record information

1. Locate the Job, Account or Contact. See “How to locate the right record” on page ccclxvii.
2. From the Activity pane’s **Log a Call** tab, press **Create new...**



The screenshot shows a software interface for job management. At the top, there is a search bar and navigation tabs including Business Management, Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, and More. The main content area displays job details for Job JN-00171, including Job Name (Roofing, Bondi Beach), Amount (\$0.00), Street (23 Lamrock Ave), and Suburb (Bondi Beach). Below the details is a progress bar with stages: Assigned, Contact, Planning, Work, Invoice, and Closed. The 'Log a Call' activity pane is open, showing options for 'Log a Call', 'New Event', 'New Task', and 'More'. A 'Create new...' button is highlighted with a green arrow, and an 'Add' button is visible next to it. The activity pane also shows sections for 'Activity Timeline', 'Next Steps', and 'Past Activity'.

The **Log a Call** activity pane displays.

3. Complete the details and press **Save**.

The screenshot shows the 'Business Management' software interface. At the top, there is a search bar and navigation tabs for Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, and More. The 'Jobs' tab is active, displaying job details for 'Job JN-00171'. The job name is 'Roofing, Bondi Beach', amount is '\$0.00', street is '23 Lamrock Ave', and suburb is 'Bondi Beach'. Below the job details is a progress bar with stages: Assigned (active), Contact, Planning, Work, Invoice, and Closed. A 'Mark Status as Complete' button is visible. The 'DETAILS' section on the left lists job information: Job Name (Roofing, Bondi Beach), Job Number (JN-00171), Customer (Alexander Hamilton), Request Type, Due Date, Job Accepted Notification Sent, Franchise (FCS Bondi Beach), Owner (Simon Walker), Status (Assigned), Sub Status, Sub-Status Reason, If other reasons, please specify, and Territory Category. The 'ACTIVITY' section on the right shows a 'Log a Call' button and a form with fields for Subject (Returned your call), Comments (Wants to meet Monday or Tuesday next week), and Name (Alexander Hamilton). A green arrow points to the 'Save' button.

The call is saved to the record's **Activity Timeline**.

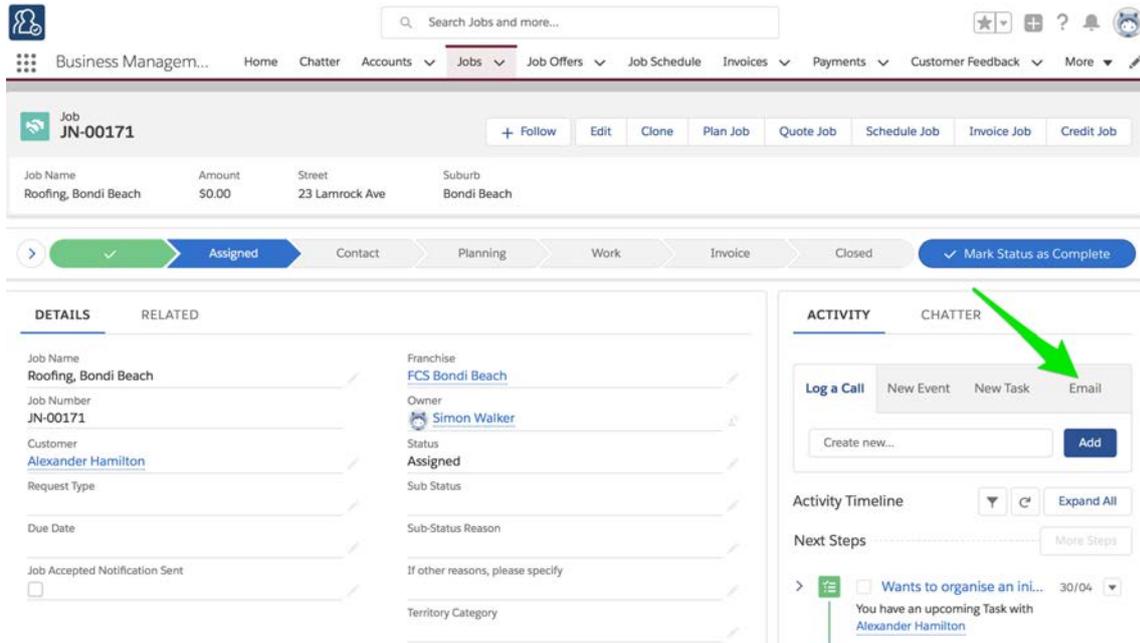
The screenshot shows the 'ACTIVITY' section of the software interface. It features a 'Log a Call' button and a 'Create new...' input field with an 'Add' button. Below this is the 'Activity Timeline' section, which includes a dropdown menu, a refresh icon, and an 'Expand All' button. The 'Next Steps' section is currently empty, with a 'More Steps' button. A message states: 'No next steps. To get things moving, add a task or set up a meeting.' The 'Past Activity' section shows a call log entry: 'Returned your call' with a date of 'Today' and a description 'You logged a call with Alexander Hamilton'. A 'Load More Past Activities' button is located below the entry. A green box highlights the call log entry.

How to send an email

Salesforce allows you to send an email to the customer. When you send an email using Salesforce the email is logged to the Activity Timeline. This is useful for keeping a record of all interactions with the customer.

To send an email

1. Locate the Job, Account or Contact. See “How to locate the right record” on page ccclxvii.
2. From the **Activity** pane, select the **Email** tab.



The screenshot displays the Salesforce interface for a Job record. The top navigation bar includes a search bar and various menu items like 'Business Management...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', 'Customer Feedback', and 'More'. The main content area shows the Job details for 'Job JN-00171' with fields for Job Name, Amount, Street, and Suburb. Below this is a progress bar with stages: Assigned, Contact, Planning, Work, Invoice, Closed, and Mark Status as Complete. The 'DETAILS' section on the left lists fields like Job Name, Job Number, Customer, Request Type, Due Date, and Job Accepted Notification Sent. The 'RELATED' section on the right lists Franchise, Owner, Status, Sub Status, Sub-Status Reason, and Territory Category. The 'ACTIVITY' pane on the right shows a tab for 'Email' selected, with options for 'Log a Call', 'New Event', 'New Task', and 'Email'. A green arrow points to the 'Email' tab. Below the 'Email' tab is a 'Create new...' field and an 'Add' button. The 'Activity Timeline' section shows a filter icon, a refresh icon, and an 'Expand All' button. The 'Next Steps' section shows a task 'Wants to organise an ini...' with a date of 30/04 and a dropdown arrow. Below the task is a notification: 'You have an upcoming Task with Alexander Hamilton'.

The **Email** tab displays, and shows the owner of the record in the From address.

3. Copy the email address from Account Name and paste it into the To field.

The screenshot displays the Salesforce Business Management interface for a job record (JN-00171). The job details include: Job Name: Roofing, Bondi Beach; Amount: \$0.00; Street: 23 Lamrock Ave; Suburb: Bondi Beach. The job is currently in the 'Assigned' stage. A context menu is open over the contact 'Alexander Hamilton', with the 'Copy Email Address' option highlighted. A green arrow labeled '1' points to this option. Below the job details is the 'Job Contact Information' section, which lists contact details for Alexander Hamilton, including his address (23 Lamrock Ave, Bondi Beach, NSW, Australia) and a 'View Google Map' link. On the right side, the 'ACTIVITY' pane shows an email composition window. The 'To' field contains the email address 'simon.walker@franchiscloudsolu...'. A green arrow labeled '2' points from the copied email address in the context menu to this 'To' field. The email composition window also shows the 'From' field as 'Simon Walker <simon.walker@franchiscloud...>' and a 'Send' button at the bottom right.

4. Complete Subject and Details then press Send.

The screenshot displays a CRM interface for a job titled "Job JN-00171". The job details include: Job Name: Roofing, Bondi Beach; Amount: \$0.00; Street: 23 Lamrock Ave; Suburb: Bondi Beach. The job status is "Assigned".

The "DETAILS" section is divided into "Job Name" and "Job Contact Information".

Job Name	Job Contact Information
Roofing, Bondi Beach	Salutation
Job Number: JN-00171	Street: 23 Lamrock Ave
Customer: Alexander Hamilton	Suburb: Bondi Beach
Request Type	Postcode: 2026
Due Date	Country: Australia
Job Accepted Notification Sent	State: NSW
	Mobile
	Other Phone
	Job Description

The "ACTIVITY" section shows an email composition window. The subject is "Additional meeting times". The body text is: "Hi Alexander, Just checked my schedule. I'm also available on the 15th and 18th. Is that of interest? Yours, Simon". A green arrow points to the "Send" button.

The email is sent and is added to the Past Activity.

The screenshot displays the Salesforce Business Management interface for a job titled "Roofing, Bondi Beach" (Job ID: JN-00171). The interface is divided into several sections:

- Job Details:** Shows job name, amount (\$0.00), street (23 Lamrock Ave), and suburb (Bondi Beach).
- Process Flow:** A series of steps: Assigned (active), Contact, Planning, Work, Invoice, and Closed. A "Mark Status as Complete" button is visible.
- DETAILS:** A table of job information including Job Name, Job Number, Customer (Alexander Hamilton), Request Type, Due Date, Job Accepted Notification Sent, Franchise (FCS Bondi Beach), Owner (Simon Walker), Status (Assigned), Sub Status, Sub-Status Reason, and Territory Category.
- Job Contact Information:** A table with fields for Salutation, Street (23 Lamrock Ave), First Name (Alexander), Last Name (Hamilton), Suburb (Bondi Beach), and Postcode (2026).
- ACTIVITY:** A list of recent activities. One activity is highlighted with a green box: "Additional meeting times" (4:31 PM Today) with the description "You sent an email to Alexander Hamilton". Other activities include "Returned your call" (Today) with the description "You logged a call with Alexander Hamilton".



You can easily streamline the emails you send by creating standardized templates. For more information refer to the Salesforce documentation, [Create a Template](#).

The screenshot shows the Salesforce email composition interface. The "ACTIVITY" tab is selected, and the "Email" button is highlighted. The "From" field is set to "REC Sales Manager <mike@franchisec...". The "To" field is empty. The "Related To" field is set to "Alexander Ivanov". A "Send" button is visible. A green box highlights the "Send" button and the "Related To" field.

How to confirm a scheduled appointment with a customer



Salesforce does not provide the ability to send a meeting request to a customer using built-in Activity features.

To send a meeting invite or appointment confirmation, your options are

- » Send an email confirming the agreed details, or
- » Use an external calendaring application such as Google Calendar to send the meeting confirmation

Working with emails and templates

You can configure email templates to suit your organization.

How to set up an email signature block

Setting up a signature block is something almost everyone does when they first set up their personal settings within Salesforce.



Who does what?

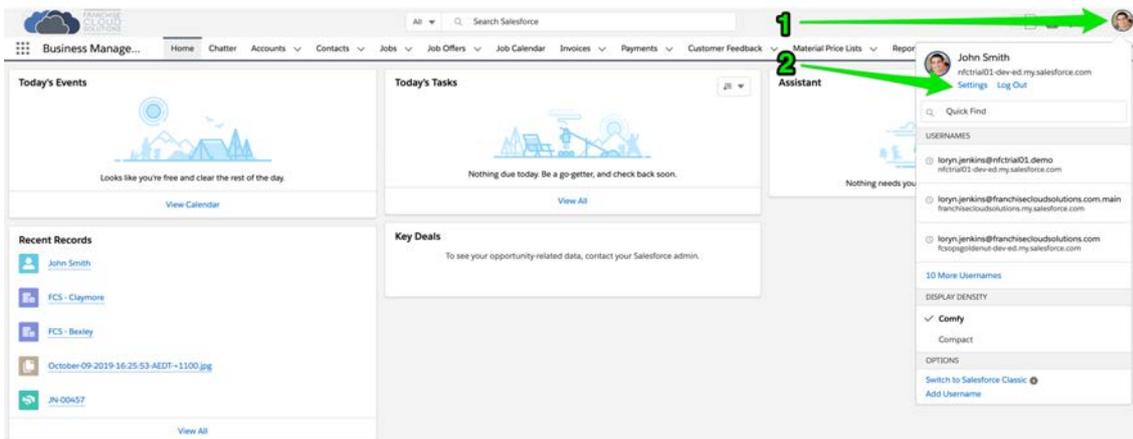
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Each user can set up their own standard signature block. Systems administrators are required to set up rich text signatures.



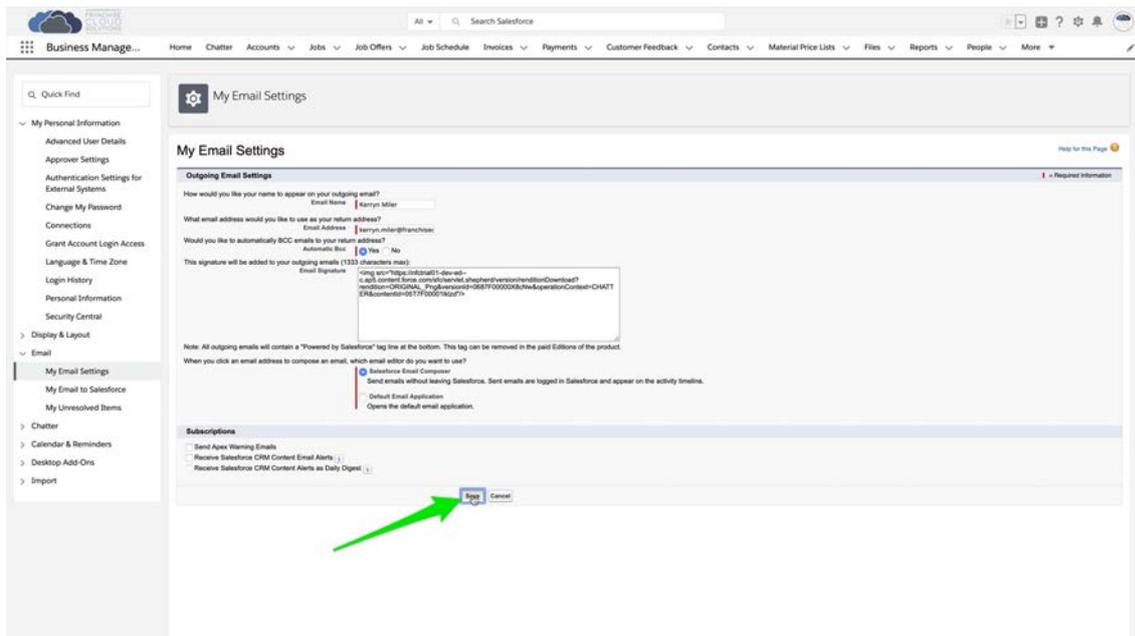
Ask your system administrator to upload the image or images you need for your signature block. Your system administrator will hand back to you the code to include in your image block that will make your image or images appear in your signature block.

To set up a signature block

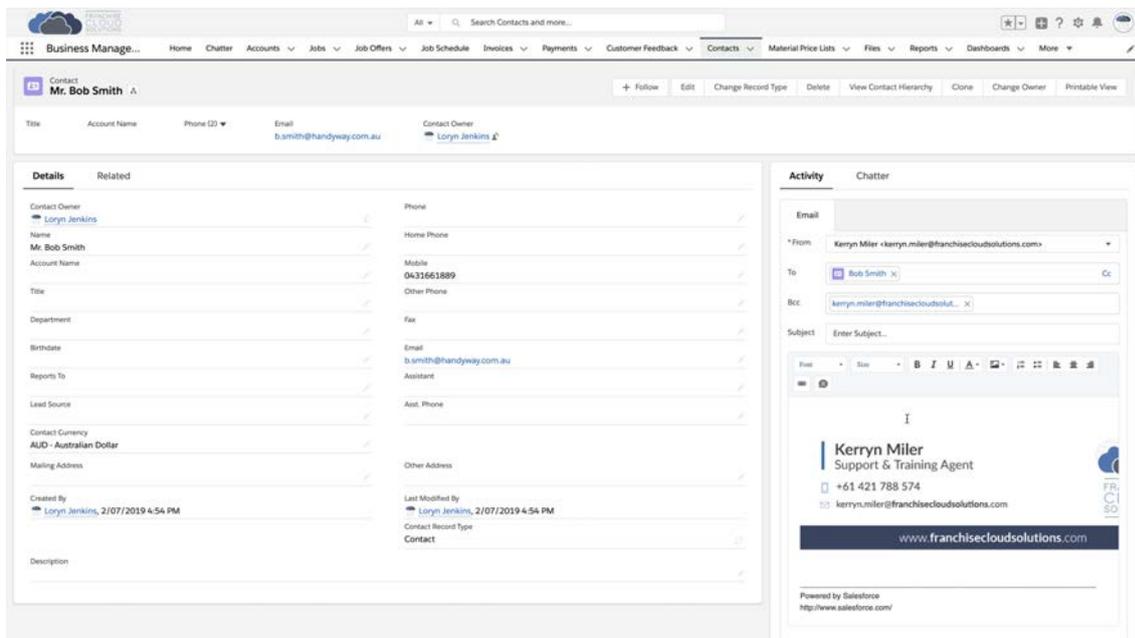
1. Obtain the signature block URL from your system administrator.
2. Go to your personal **Settings**.



5. Press Save.



6. The email signature block will now appear within your emails.

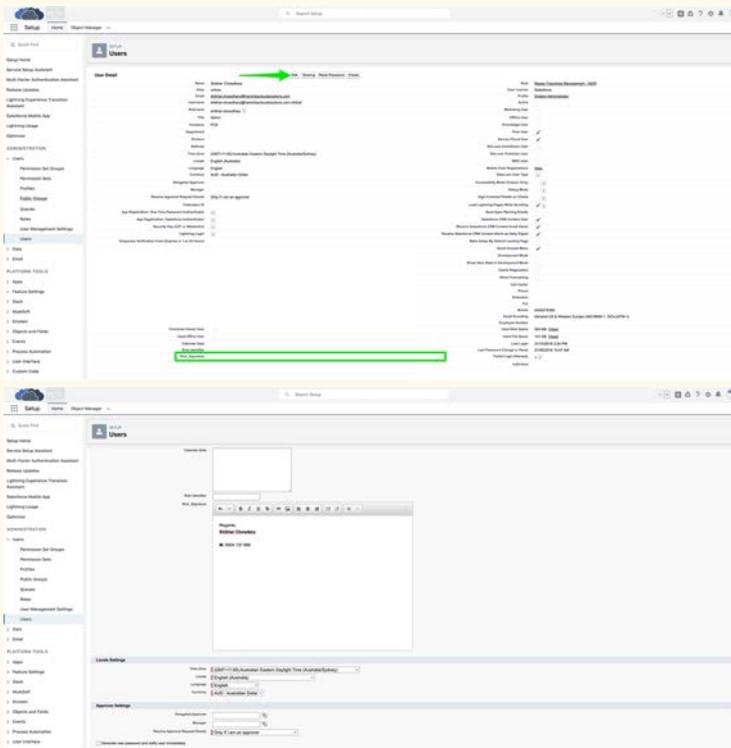


If you use templates, each template will need to contain your signature block and you will need to have a completed email signature block.



Rich Text Signatures

System administrators can set up Rich Text Signatures from the User Details record. On pressing Edit, you can construct a rich text email signature consisting of fonts, colors, and images having publicly-accessible URLs.

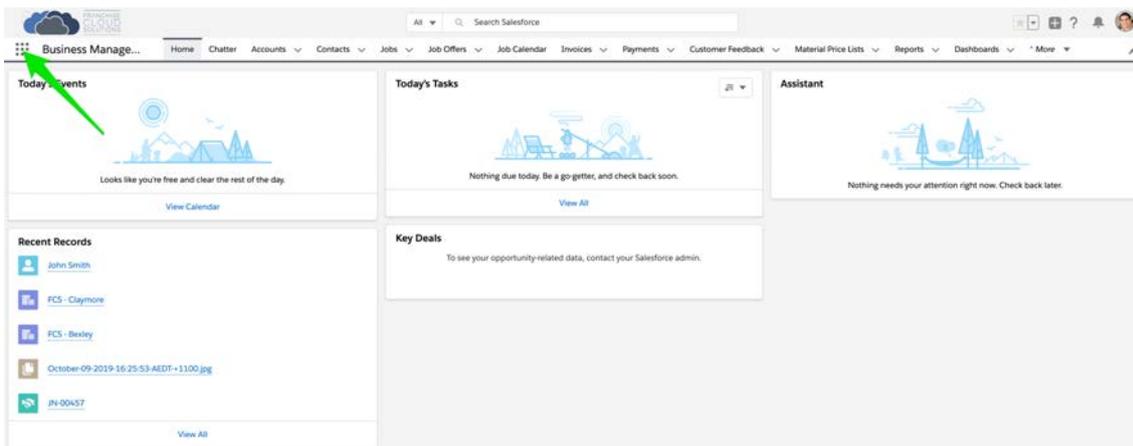


How to review email template headers and footers

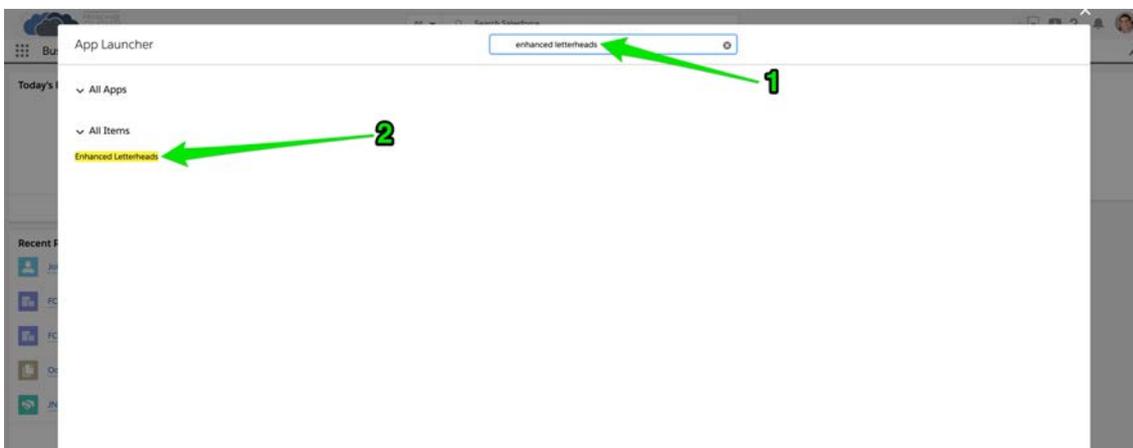
Most likely your franchisor will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

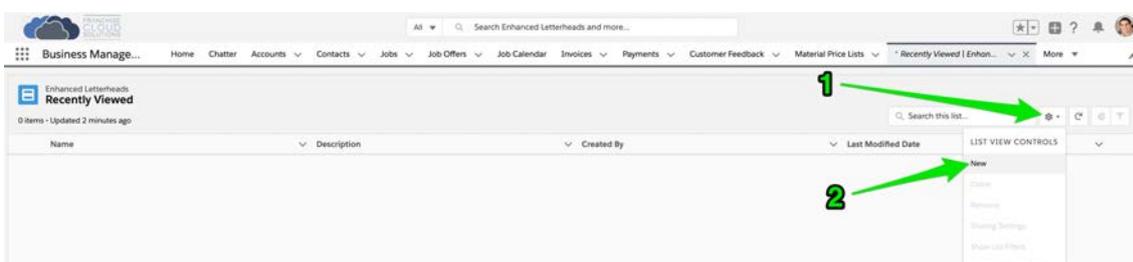
1. Open the App Launcher.



2. In the App Launcher Search box, enter *enhanced letterheads* and select the Enhanced Letterheads link.



3. You may see an empty Enhanced Letterheads list. To see any of the letterheads, create a New list view.



4. Name the list view and press **Save**.

New List View

*List Name
All

Who sees this list view?

- Only I can see this list view
- All users can see this list view
- Share list view with groups of users

Cancel Save

5. Now select the Standard Letterhead.

Business Manage... Home Chatter Accounts Contacts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Material Price Lists Recently Viewed | Enhon... More

Enhanced Letterheads
All

1 item - Sorted by Name - Filtered by all enhanced letterheads - Updated a minute ago

Name	Created By	Last Modified Date	Description
1 FCS Standard Letterhead	ljenk	23/01/2020 2:18 PM	

6. You will be able to view but not edit the Standard Letterhead.

Business Manage... Home Chatter Accounts Contacts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Material Price Lists Reports Recently Viewed | Enhon... More

Enhanced Letterhead
FCS Standard Letterhead

Description

Details

Information

Name	Description
FCS Standard Letterhead	

Letterhead Content

Header

Footer
@Sender_Signature_...@

System Information

Created By Loryn Jenkins, 23/01/2020 2:18 PM	Last Modified By Loryn Jenkins, 25/03/2020 4:46 PM
---	---



If you would like a change to the Standard Letterhead, speak to your field manager or system administrator.



There may be more than one Letterhead available within your implementation. If there is, review each letterhead to see which one(s) you might like to use. You can add letterheads to any custom email template you might choose to create. See “How to create a custom email template” on the next page.

How to edit default email templates

Business Management ships with a range of default email templates. These have been configured to customer specification during implementation.



Ask your system administrator to edit the templates for you.

How to create a custom email template

Custom email templates allow you to produce professional email communications for each standard customer touch-point. They often consist of

- » customized header and footers
- » boilerplate text
- » variables that draw information from the Job, Account, Contact or Invoice.

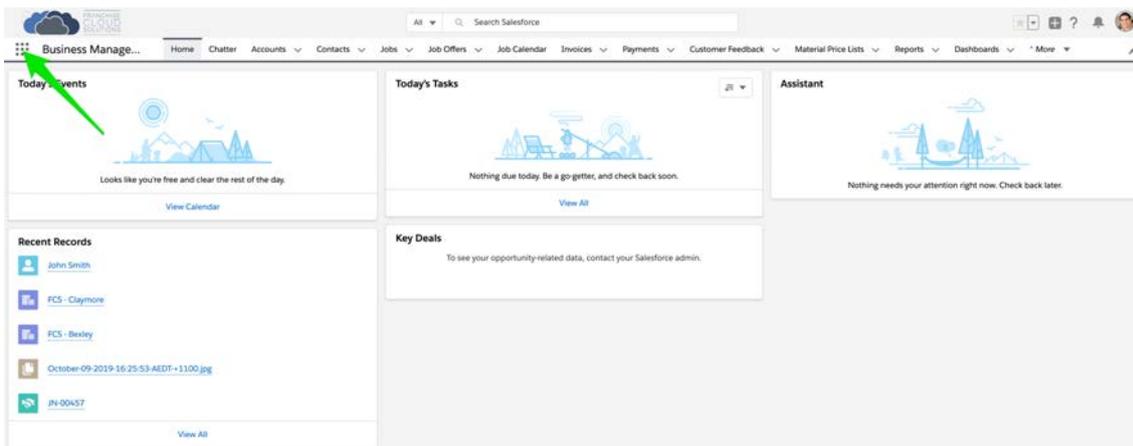


Email templates that are frequently created by our clients include

- » New customer initial contact
- » Returning customer initial contact
- » New Quote Job request
- » New Do & Charge Job request
- » Scheduled appointment notification
- » Quote email
- » Invoice email
- » Invoice overdue

To create a custom email template

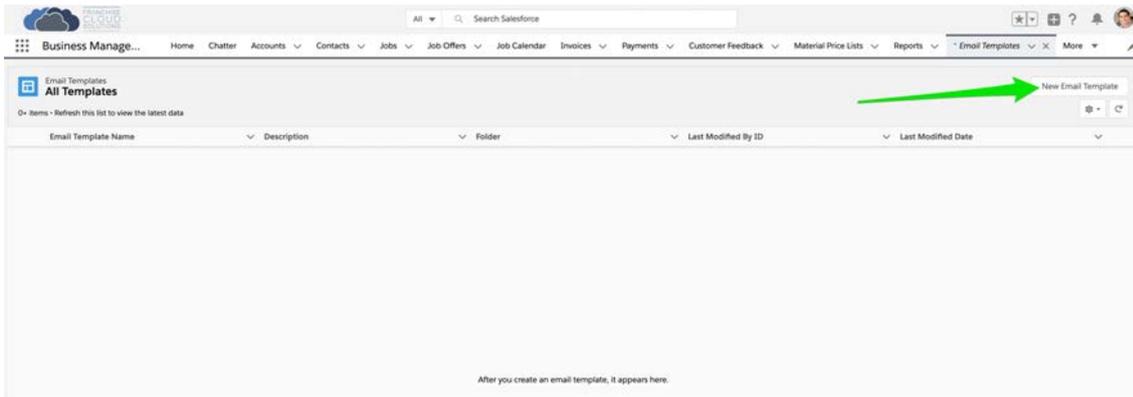
1. Open the App Launcher.



2. In the App Launcher Search box, enter *email templates* and select the Email Templates link.



3. You may see an empty Email Templates list. Press **New Email Template**.



4. Insert an email template name that will help you identify it.

New Email Template

Information

* Email Template Name Related Entity Type

Description Folder

Message Content

Subject Enhanced Letterhead

HTML Value

B *I* U **A**

Additional Information

Created By Last Modified By

5. If you are going to use merge fields, you must base the email template off a particular entity type. Quotes should be based on Jobs. Invoices should be based on Invoice. The related entity type you choose will determine which fields are available for merging and where this template will be visible within Salesforce.

New Email Template

Information

*Email Template Name

Related Entity Type
-- None --

Description

Message Content

Subject

HTML Value

Source Font Size **B** *I* U **A** [List Icons]

Additional Information

Created By Last Modified By

Cancel Save

6. Enter an email subject line.

New Email Template

Information

* Email Template Name <input type="text" value="My Quote Email Template"/>	Related Entity Type <input type="text" value="Job"/>
Description <input type="text"/>	Folder <input type="text" value="Private Email Templates"/>

Message Content

Subject <input style="border: 2px solid green;" type="text" value="FCS Invoice - {{{FCS_OPS__Job__c.Name}}}"/>	Enhanced Letterhead <input type="text" value="Search Enhanced Letterheads..."/>
---	--

HTML Value

Source Font Size **B** *I* U **A**

(1)

Additional Information

Created By	Last Modified By
------------	------------------

7. Select an appropriate letterhead.

New Email Template

Information

* Email Template Name: Related Entity Type:

Description: Folder:

Message Content

Subject: Enhanced Letterhead:

HTML Value:

(A green arrow points to the "FCS Standard Letterhead" option in the dropdown menu.)

Additional Information

Created By: Last Modified By:

 You can review the available letterheads. See “How to review email template headers and footers” on page ccllxxxii.

8. Enter boilerplate text into the HTML Value field.

New Email Template

Information

* Email Template Name My Quote Email Template	Related Entity Type Job
Description 	Folder Private Email Templates

Message Content

Subject FCS Invoice - {{{FCS_OPS__Job__c.Name}}}	Enhanced Letterhead FCS Standard Letterhead
--	---

HTML Value

Source Font Size B I U A

Dear ,

Please find attached your quote for job .

Feel free to contact me if you have any queries or need further information about the work.

Thank you,

Additional Information

Created By	Last Modified By
------------	------------------

Cancel Save

9. To insert variables into the email template body, press the **Insert Merge Field** button (i.e. the brace button { }).

New Email Template

Information

*Email Template Name My Quote Email Template	Related Entity Type Job
Description	Folder Private Email Templates

Message Content

Subject FCS Invoice - {{{FCS_OPS__Job__c.Name}}}	Enhanced Letterhead FCS Standard Letterhead
---	--

HTML Value

Dear ,

Please find attached your quote for job .

Feel free to contact me if you have any queries or need further information about the work.

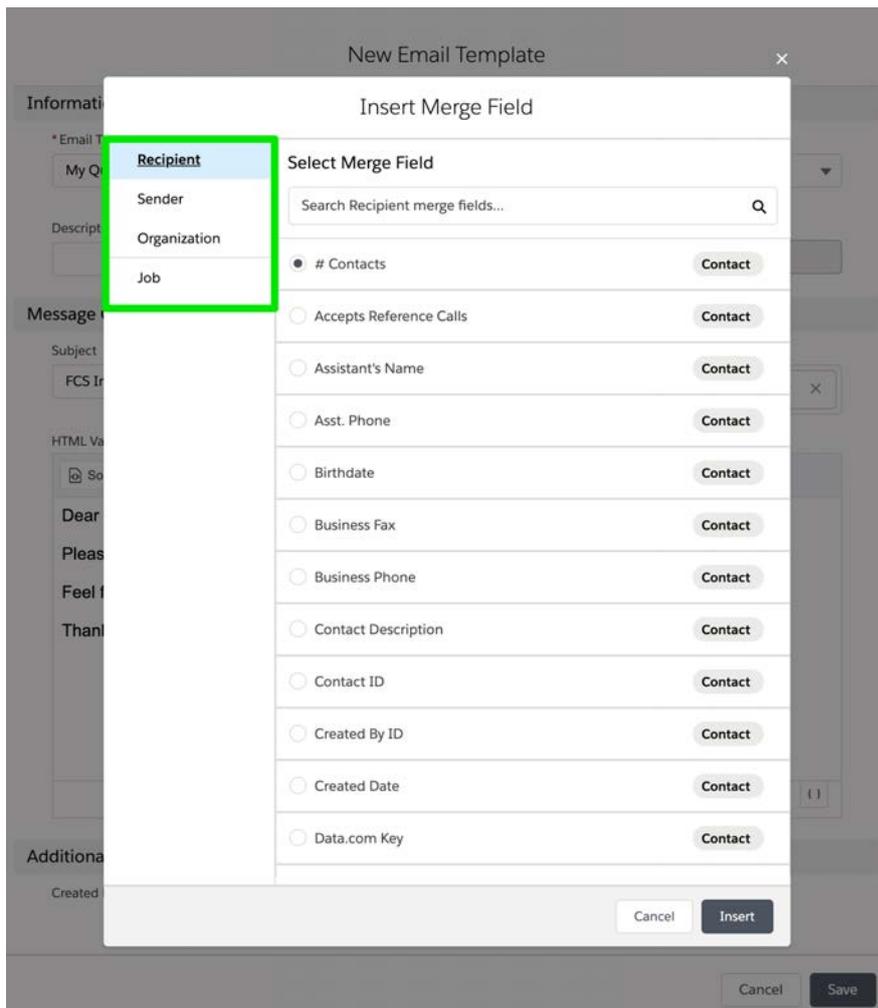
Thank you,



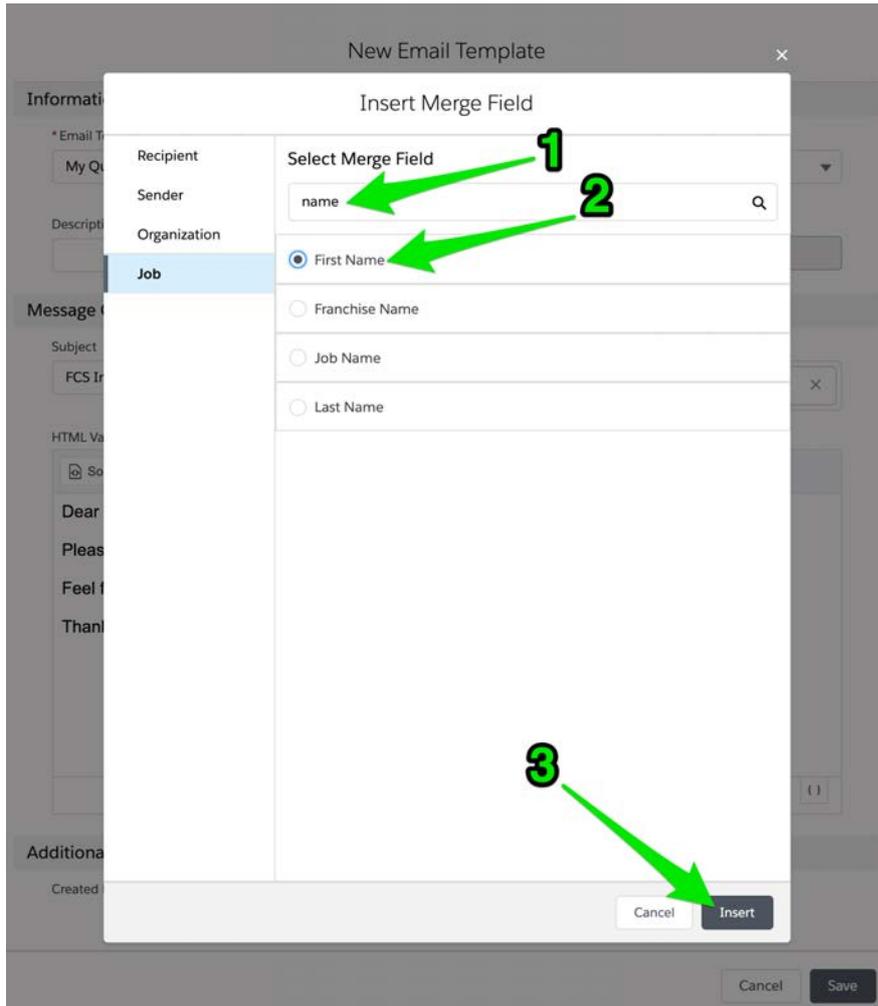
Additional Information

Created By	Last Modified By
------------	------------------

10. Select the Object Reference. Most of the time you will be referring to the Job or Invoice. Sometimes you might reference yourself (Sender) or your organization (Organization).



11. Now search for and then select the appropriate Merge Field. Press **Insert** when complete.



12. Enter as many merge fields as are appropriate to your template. Press **Save** when the template is complete.

New Email Template

Information

*Email Template Name: Related Entity Type:

Description: Folder:

Message Content

Subject: Enhanced Letterhead:

HTML Value

Source Font 16 B I U A

Dear {{{FCS_OPS__Job__c.FCS_OPS__First_Name__c}}},

Please find attached your quote for job {{{FCS_OPS__Job__c.Name}}}. |

Feel free to contact me if you have any queries or need further information about the work.

Thank you,

Additional Information

Created By Last Modified By



Remember to test your template before sending it to the first customer.



Tips

- » To insert a merge field into a subject line, press the Insert Merge Field button (i.e. the brace button { }) attached to the HTML Value field. Once the variable is inserted into the HTML Value field, you can copy and paste it into the Subject line.
- » To allow the template to display the user's own signature block, select one of the following merge fields:
 - » {{{Sender.Signature}}}
 - » {{{Sender.Rich_Signature__c}}}
- » To ensure the font appearing in your email is controlled by the template (and not by the user's own browser settings) specify a suitable HTML format and enter it into the editor while in HTML source mode. The following provides a reasonable example of how to ensure the HTML styling and not the browser font settings determine the look of the text.

```
<html style="overflow-y: hidden;">
<head>
  <title></title>
</head>
<body style="height: auto; min-height: auto;">
<div style="text-align: left;"><span style="font-size: 14px;"><span style="font-family: Helvetica, Arial, sans-serif;">Dear {{{Recipient.FirstName}}}, <br />
<br />
First para goes here.<br />
<br />
<u><strong>Bolded Heading</strong></u><br />
Next para goes here.<br />
<br />
{{{Sender.Rich_Email_Signature__c}}}</span></span></div>
</body>
</html>
```

How to create a Quote email template

When you are using the Nextdoc for document generation, you need to use an email template for any Quotes you send to customers. You can use the standard Quote email template or you can create your own custom Quote email template.

To create a custom quote email template

1. Follow the instructions in “How to create a custom email template” on page cclxxxv.
2. Ensure you base the `Entity Type` on `Job`.

How to create an Invoice email template

When you are using the Nextdoc for document generation, you need to use an email template for any Invoices you send to customers. You can use the standard Invoice email template or you can create your own custom Invoice email template.

To create a custom invoice email template

1. Follow the instructions in “How to create a custom email template” on page cclxxxv.
2. Ensure you base the `Entity Type` on *Invoice*.

Working with emails and syncing

There are several different methods of coordinating how email operates between Salesforce and your email system. Please read “Understanding email sending, responses and syncing” below to obtain an overview of which method may be most appropriate for your organization.

Understanding email sending, responses and syncing

When you send an email from Salesforce, a Salesforce email server will send the email on your behalf. The server that sends the email is not your usual company email server. Instead, it is a Salesforce server that claims to be from your personal email account.



Your system administrator has to specially configure both Salesforce and your company domain name systems to enable Salesforce to act on your behalf.

When a recipient responds to your email, the response will go to your personal email inbox (not to Salesforce). This means:

Outbound emails	Inbound emails
Sent by Salesforce server	Responds to your personal email inbox
Not stored in your personal email outbox	Not stored in Salesforce

If you did nothing else, your record of emails sent and received would be divided between these two systems. Fortunately, Salesforce provide a number of mechanisms to help overcome this divide.

Forwarding a record of sent emails to your email inbox

To ensure your email inbox has a record of all emails you send from Salesforce, you can choose to send emails to your inbox. See “How to send all emails to my inbox” on page cd.

Automatic capture of Salesforce-related emails

Salesforce provides a way to automatically capture emails relating to Salesforce contacts from within your personal email and to associate the email with matching record(s) in Salesforce. This feature is called **Einstein Activity Capture (EAC)**.

If your system administrator configures EAC and you agree to use it:

- » emails sent and received within your personal email inbox is captured by Salesforce and associated with records in Salesforce
- » emails captured by EAC will appear in the Activity Timeline beside each record

- » emails displayed in the Activity Timeline will, at your discretion, be visible to:
 - » only you
 - » to people who belong to Salesforce groups (you select the groups who can see your emails), or
 - » everyone



EAC is not suitable for everyone

While EAC provides a convenient mechanism, there are potential downsides to using it.

1. **Emails captured with EAC are transient.** They are retained for between six and eighteen months (depending on whether your organization is using the free or paid version of EAC) after which they are discarded. If you wish to store emails in Salesforce permanently, you should explore other options.
2. **Emails captured with EAC cannot be reported on.** Emails that you send from Salesforce are stored in the Activity History and can be made the subject of reports. Emails that are captured by EAC are not stored in the Salesforce Activity History (even though they appear there) and cannot be made the subject of reports.
3. **EAC does not respect Franchise Cloud Solutions' franchise data model.** EAC is designed for use by a single organization and knows nothing about how Franchise Cloud Solutions products partition information between accounts or jobs, and between franchisors or franchisees.

Given the above considerations

- » If you're a franchisee looking to log customer email against accounts or jobs, EAC may not be suitable because it will log all emails against your contact rather than the account or job

If EAC is suitable for your use, your system administrator must configure the system and grant users access to EAC. Talk to your system administrator if you do not know whether this has been done.

Salesforce extensions for Office 365 and GSuite

If you decide that EAC is not suitable for your needs, you may prefer to use the Salesforce extensions for Office 365 and GSuite. The Salesforce extensions allow you to select which emails (and email threads) are stored in Salesforce. You also have control over which records they are stored against.

In addition to pure capture of email, the Salesforce extensions for Office 365 and Chrome also provides access to Salesforce templates within your email inbox, increasing your productivity even when you're not in Salesforce itself.

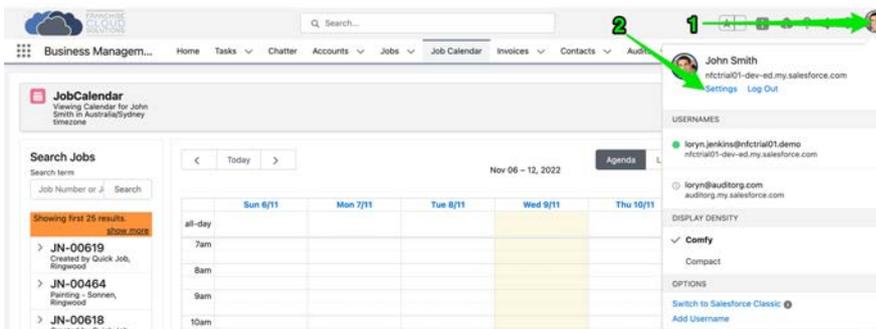
- » “Installing the Salesforce extension for Office 365” on the next page
- » “Installing the Chrome Salesforce extension for GSuite” on page cdvii
- » “Logging email using Salesforce extensions” on page cdxi
- » “Logging events using Salesforce extensions” on page cdxiii

How to send all emails to my inbox

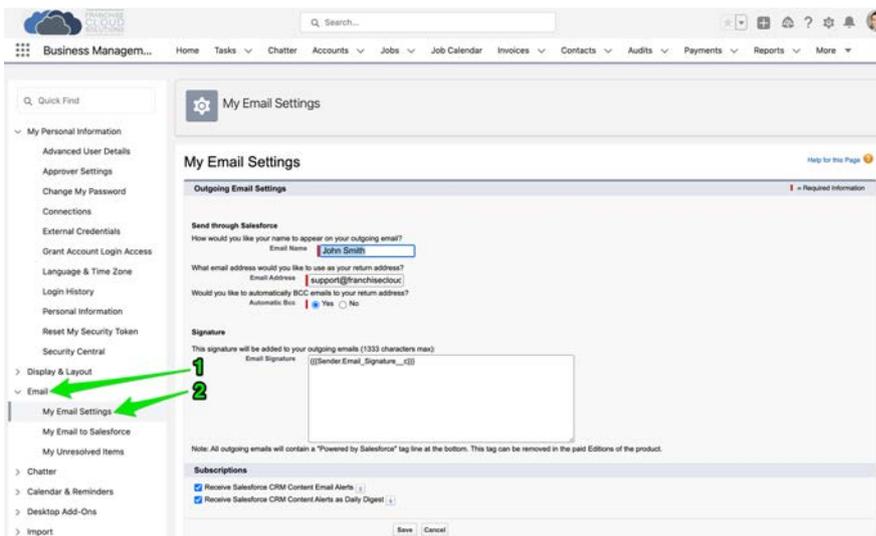
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

To blind copy all emails to your email address

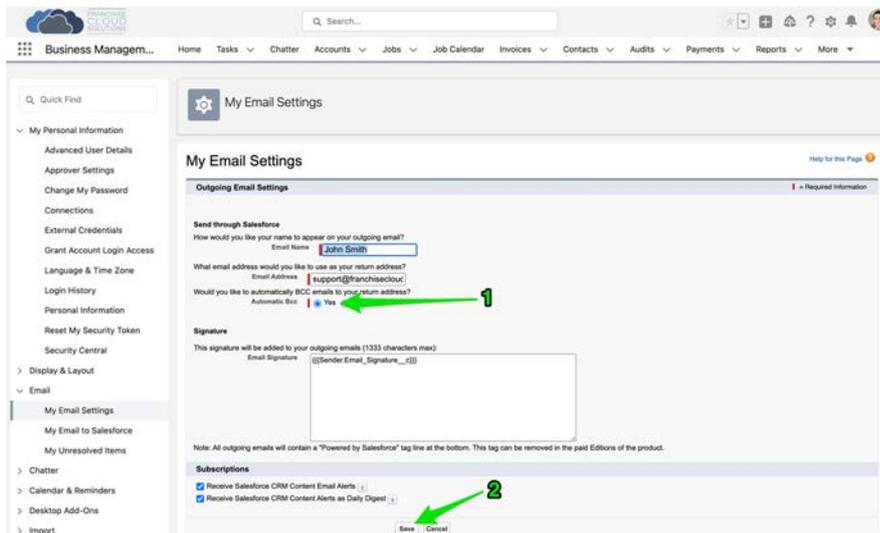
1. Go to **View Profile** and choose **Settings**.



2. Open the **Email** option and choose **My Email Settings**.



3. Set Automatic Bcc to Yes, then press Save.



If you need to send a copy of your email to an address that is not yours, follow the above procedure and then set up a forwarding rule within your personal email to forward to the secondary address.

Granting EAC sync permission

If your system administrator has enabled Einstein Activity Capture (EAC) sync for your profile, you must personally agree to using EAC. Salesforce will ask for your agreement to use EAC by displaying a banner at the top of the Salesforce page.



Before you agree, you should understand whether your administrator

- » is syncing emails, events, and contacts, or
- » is syncing events and contacts only



If you agree to using EAC, you can choose whether captured records are visible to

- » only you, or
- » a defined group of users (i.e. users who belong to specific groups), or
- » everyone who can view the records you have access to

Installing the Salesforce extension for Office 365

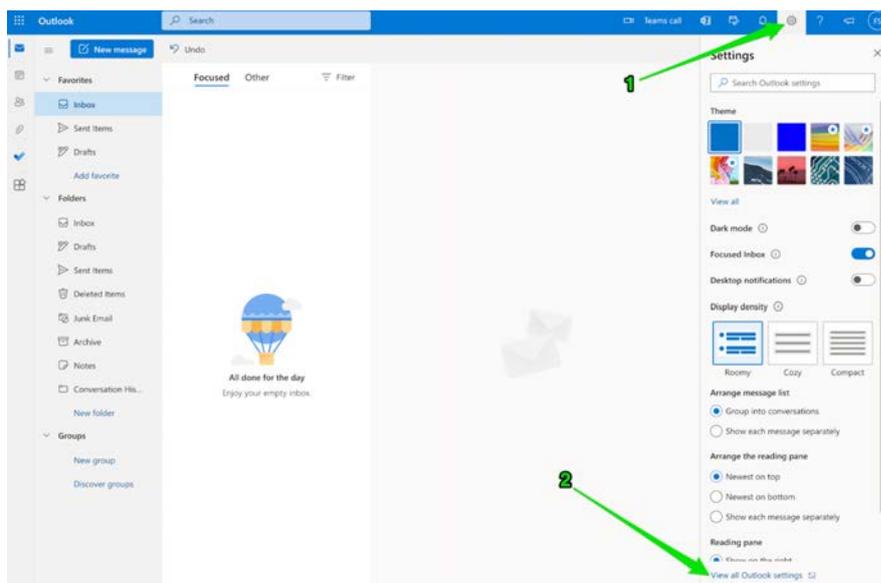
The Salesforce extension for Office 365 provides you control as to

- » which Outlook 365 emails or events are logged from your email system into Salesforce
- » which Salesforce records the email or event is logged against.

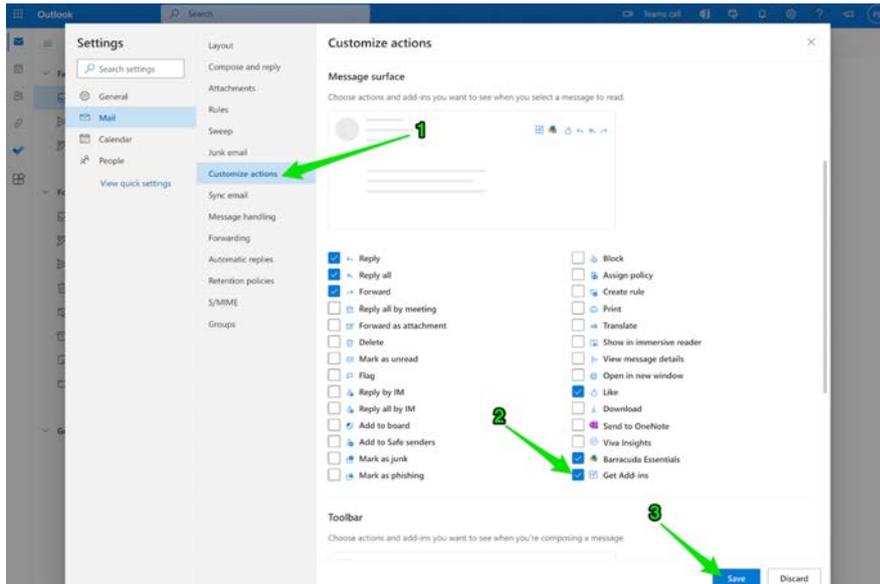
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

To install the Salesforce extension for Office 365

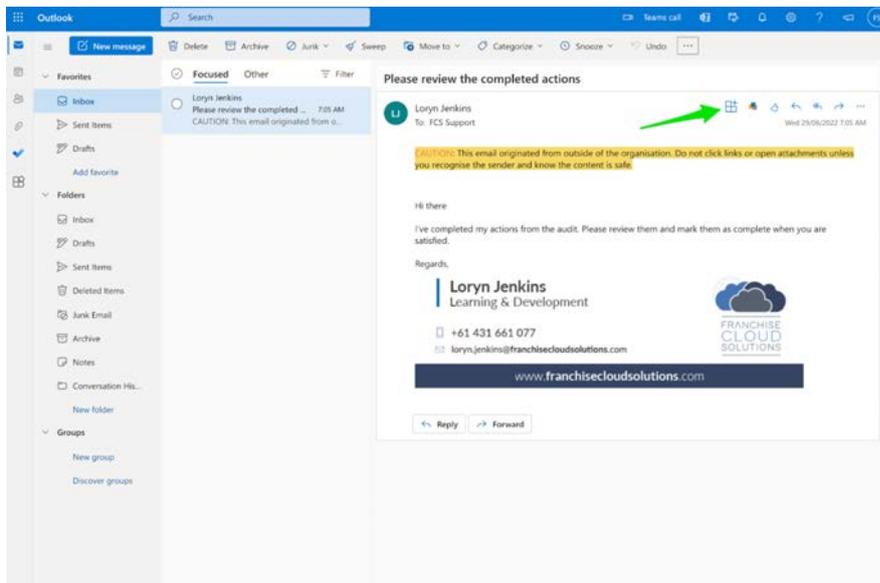
1. From Outlook 365, select the **Settings** menu and choose to **View all Outlook Settings**.



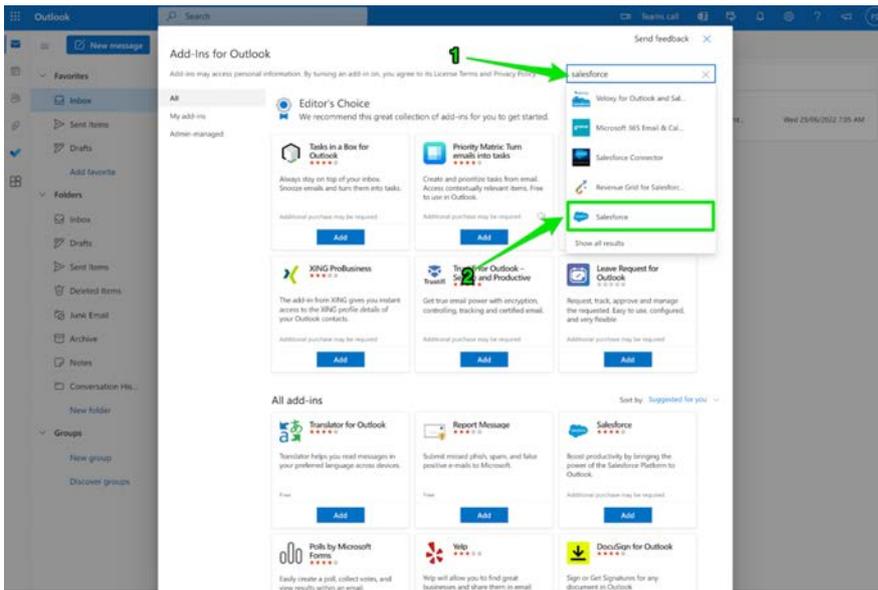
2. Choose **Customize Actions**, scroll to the section named **Message Surface**. Check **Get Add-ins** and press **Save**.



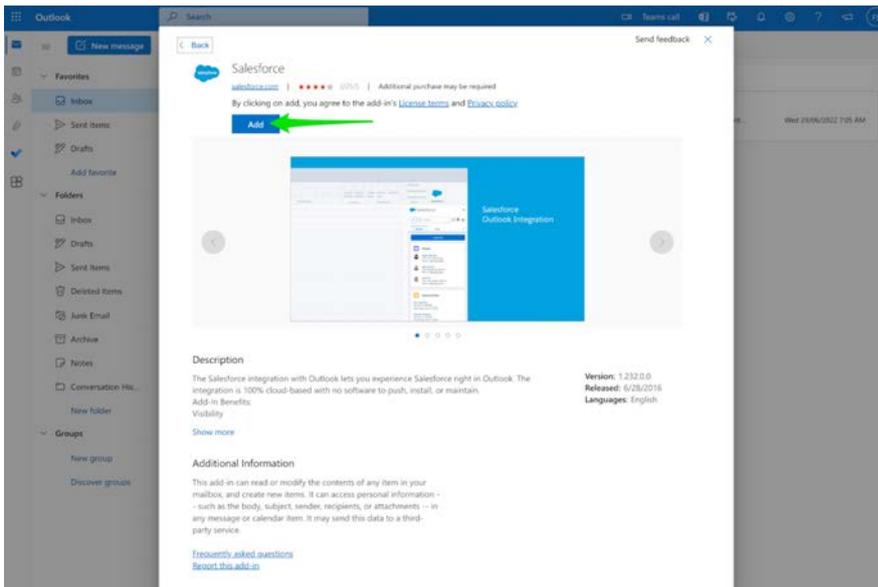
3. Within any message, click the **Get Add-ins** button.



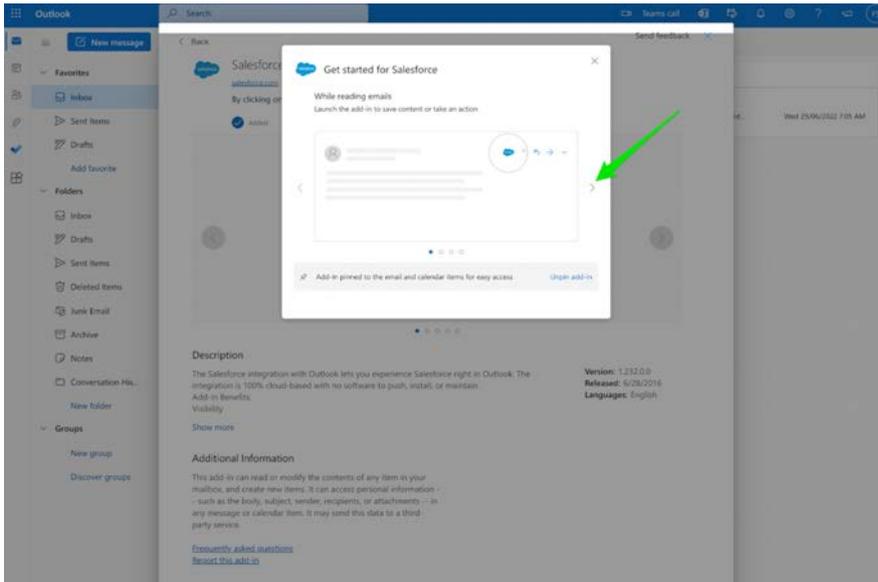
4. Within the Add-ins for Outlook box, search for *Salesforce*. A number of different salesforce add-ins will appear. Select the one shown in the following image or choose Show all results.



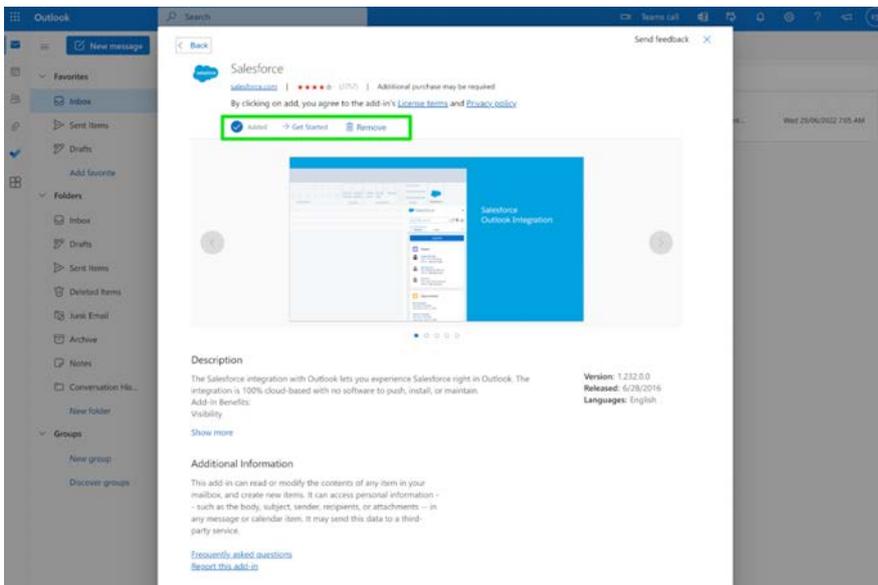
5. From the Salesforce Connector page, press the Add button.



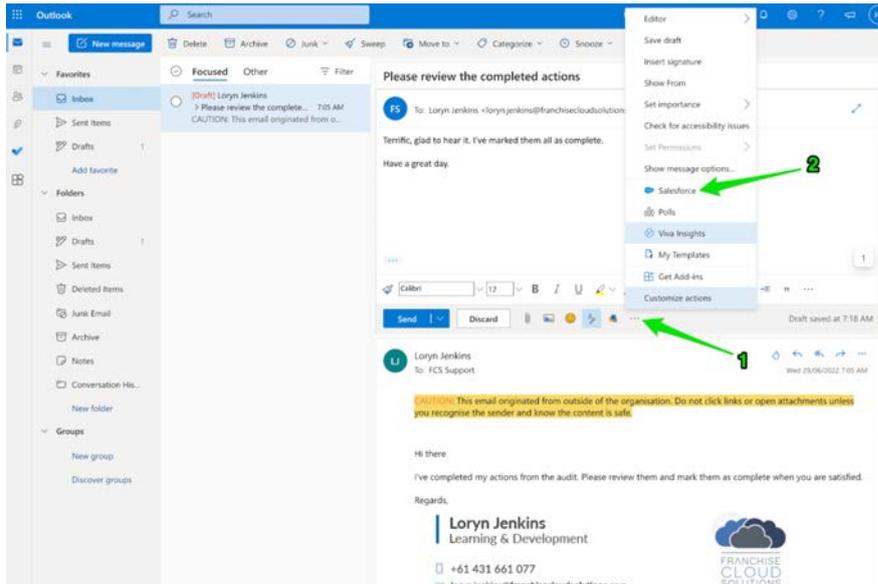
6. We recommend you browse through each of the instructions in the **Get started for Salesforce** box, so you know where to find it and how to use it.



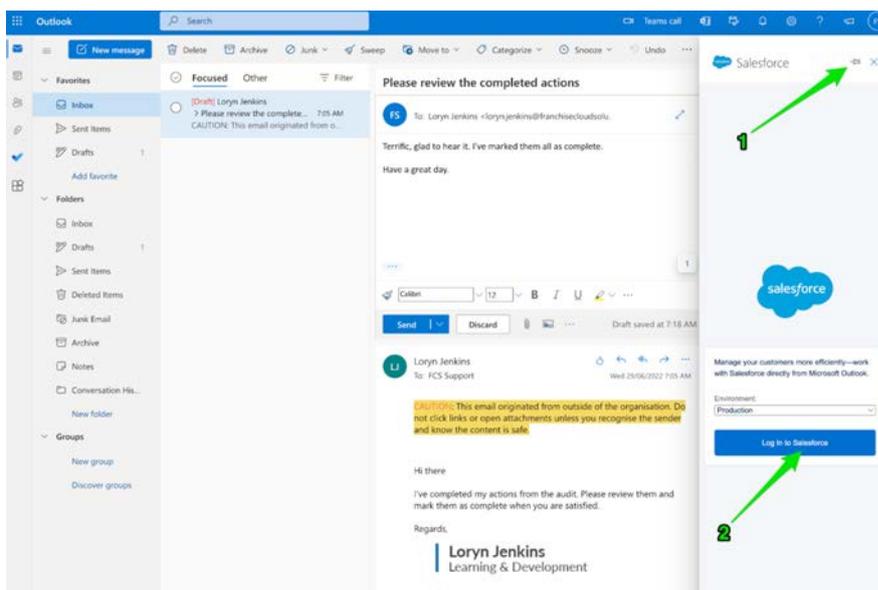
7. Dismiss the **Get started for Salesforce** box and note that the add-in has been added.



8. Now when you're in any message you're composing, on the **Send** bar, press the ... button to reveal the menu. Select the **Salesforce** add-in.



9. Ensure you **Pin** the Salesforce add-in pane. Then **Log-in** to Salesforce using the Production environment.

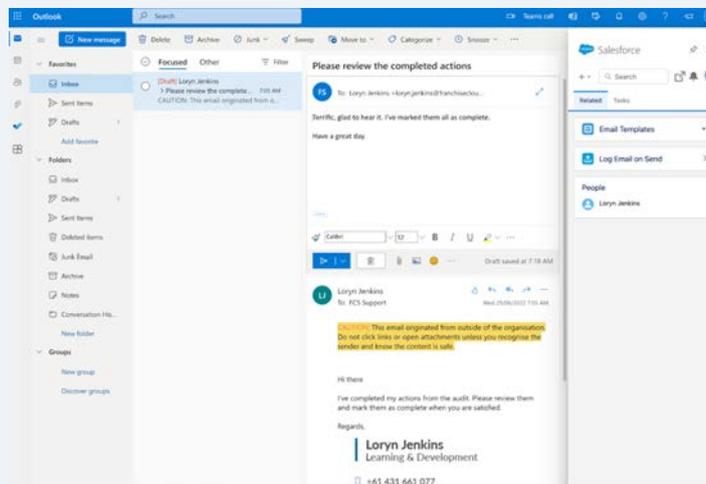


- At the login prompt, enter your Salesforce Username and Password. Once logged in, ensure you **Allow** the connection between **Outlook** and your **Salesforce** account.



Congratulations

You have completed the configuration. Now whenever you click on a message, you'll be able to see the Salesforce add-in, which will allow you to file any email message (or event, if event syncing has been configured) against selected records within Salesforce.



Installing the Chrome Salesforce extension for GSuite

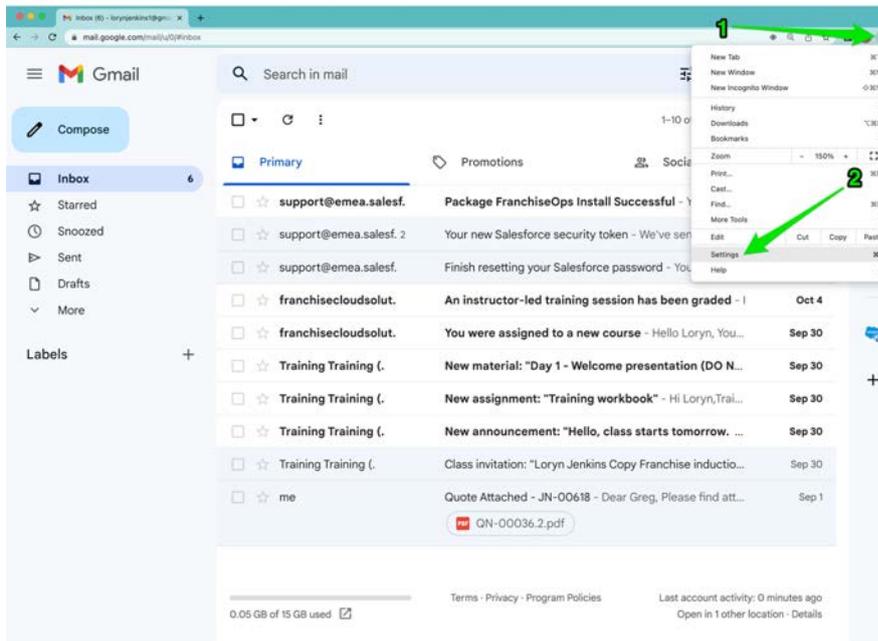
The Salesforce extension for Chrome provides you control as to

- » which emails or events are logged from your email system into Salesforce
- » which Salesforce records the email or event is logged against.

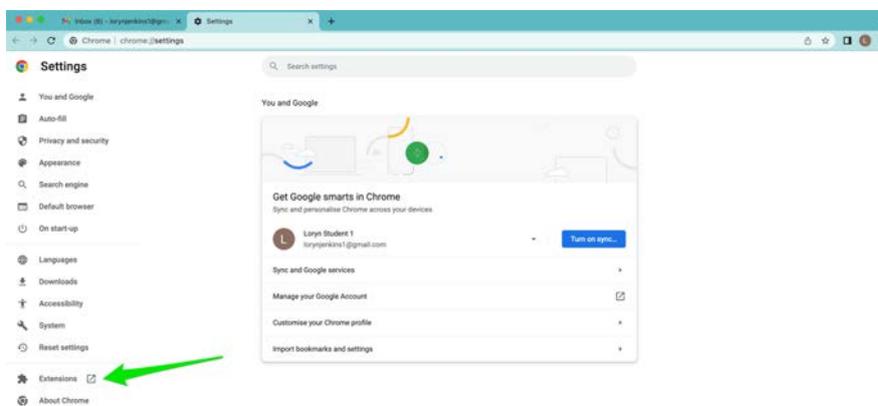
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

To install the Salesforce extension for GSuite

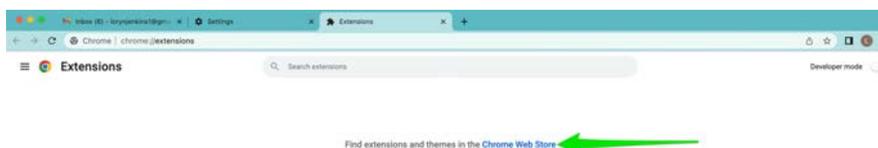
1. Using the **Chrome** browser, open **GMail**. Select the **Customize** menu, and choose **Settings**.



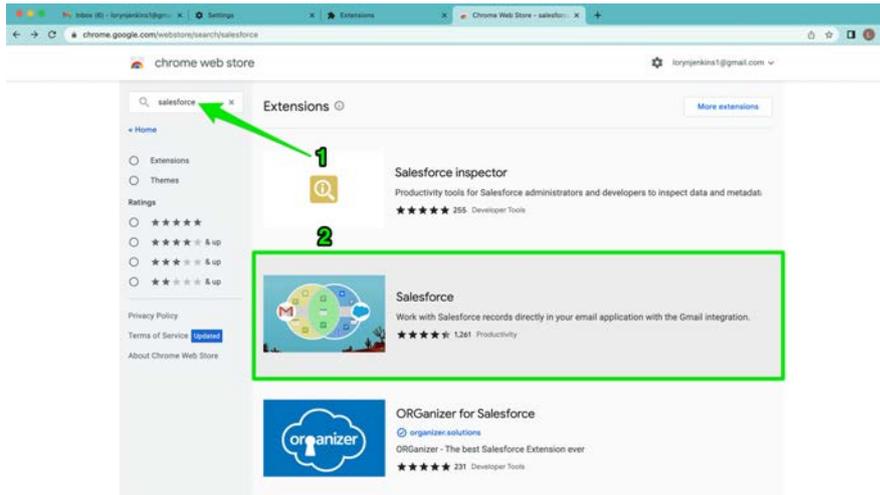
2. Chrome opens a tab in which it displays the **Settings** menu. Select the **Extensions** link.



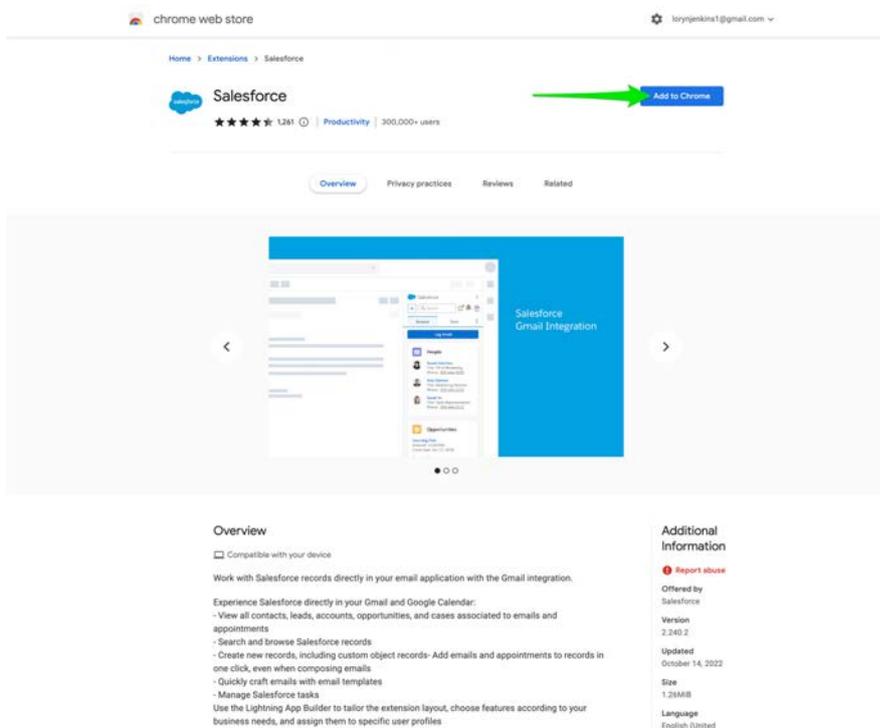
3. **Extensions** opens in yet another tab. Select the link to the **Chrome Web Store**.



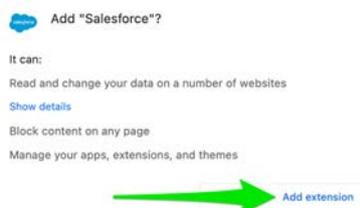
4. A fourth tab opens and displays the **Chrome Web Store**. In the search box, search for *Salesforce*. Select the **Salesforce** extension.



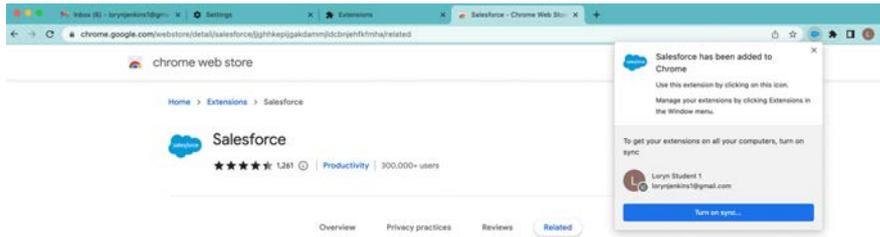
5. From the **Salesforce** entry, select the **Add to Chrome** button.



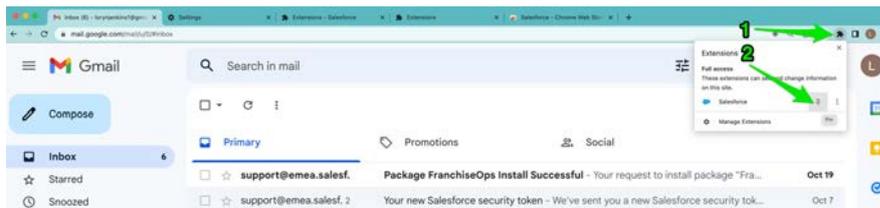
6. From the Add **"Salesforce"** box, select **Add Extension**.



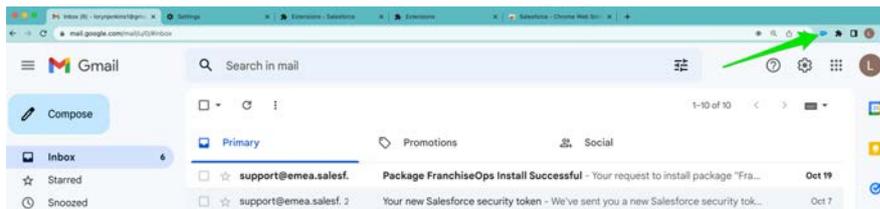
7. Salesforce adds the extension to Chrome then provides a popup to confirm that the extension has been added.



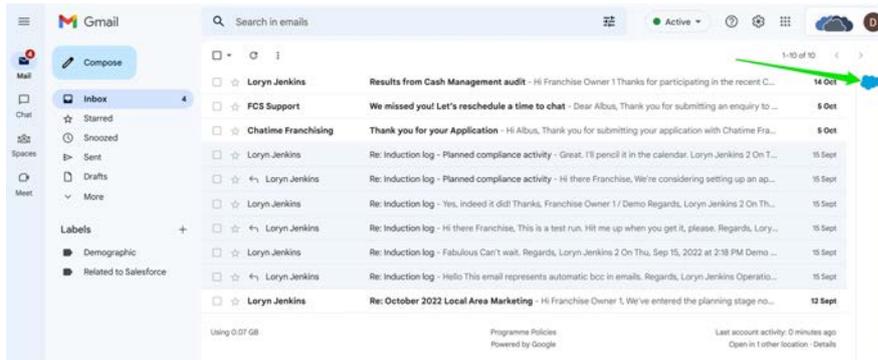
8. Now go back to the tab containing **GMail** and click on the Extensions  button, then click the **Pin** button beside the Salesforce label.



9. On pinning the **Salesforce** extension, the **Salesforce** button becomes visible in the Chrome extensions tray. Click the **Salesforce** button to show the **Salesforce** pane.

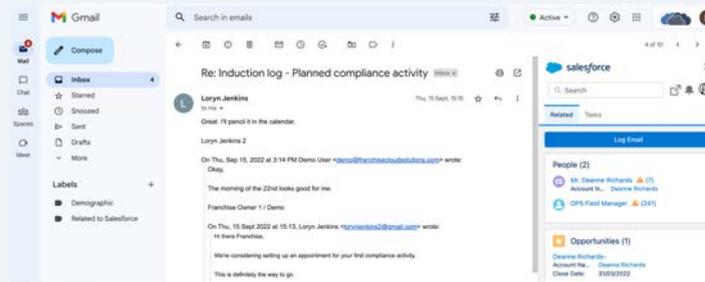


10. The Salesforce extension for Chrome now appears in the sidebar of your web browser. Click on the Salesforce cloud icon to expand the sidebar.



Congratulations

You have completed the configuration. Now whenever you click on a message, you'll now be able to see the Salesforce add-in, which will allow you to log any email message (or event) against selected records within Salesforce.



Logging email using Salesforce extensions

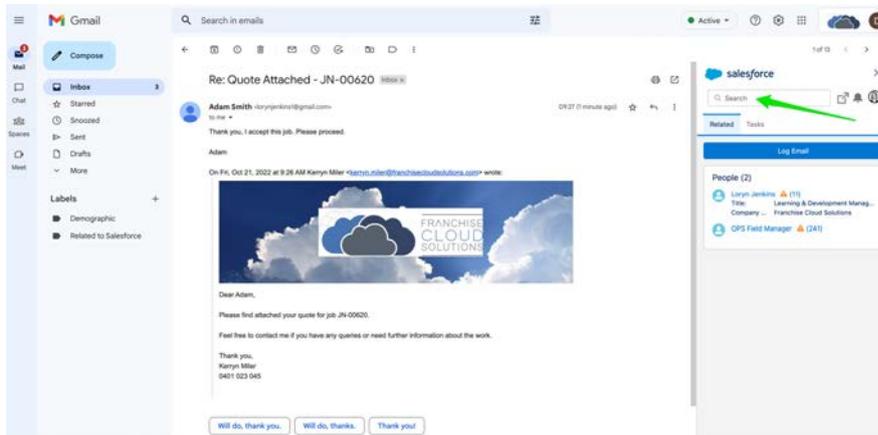
When you open an email with the Salesforce extension open, the Salesforce extension presents you with the opportunity to log the email into Salesforce against one or more records. By default, you can log the email against a person (**Contact**) and against another object (typically **Account**, or, a **Management Log**). You can also choose to log an email against a single object if you do not wish to log the email against a person.



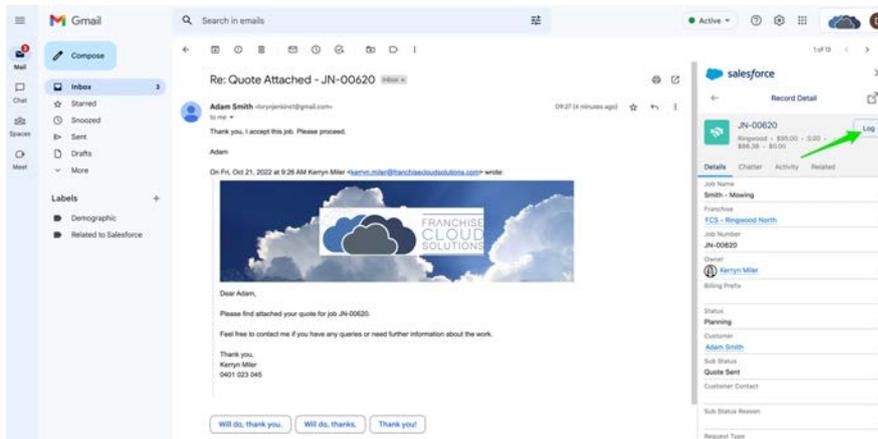
All screen shots below show the Chrome extension. The extension for Office 365 is used similarly.

To log an email against a job (or account)

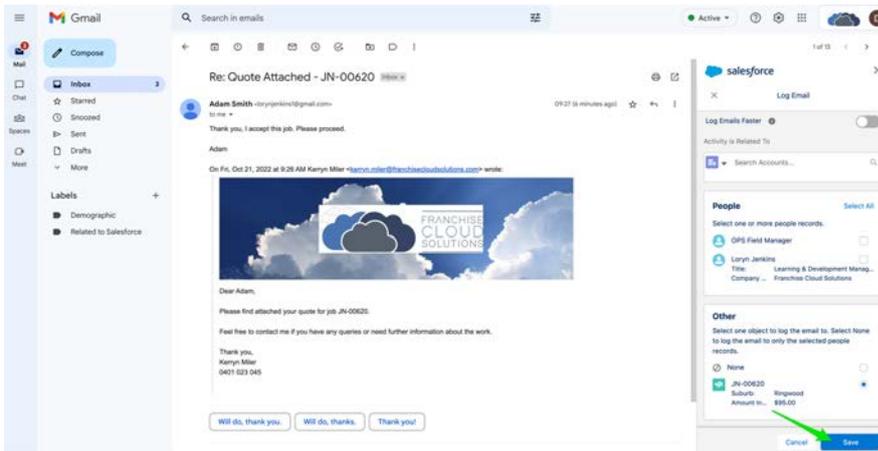
1. With your email open and the Salesforce pane opened, search for the **Job** record in the search field.



2. The system will display the **Job** record. When you're satisfied it is the right record, press **Log**.

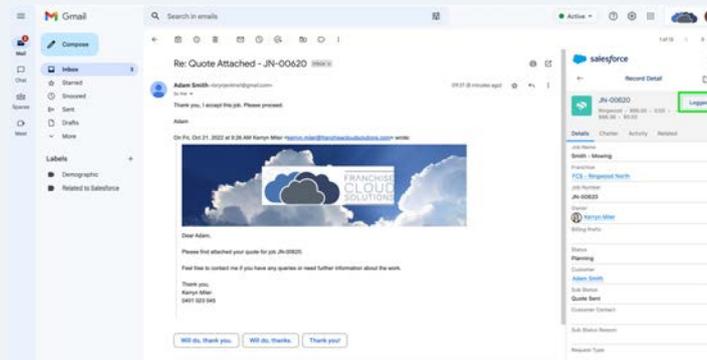


3. Press Save.



Congratulations

The record is now logged against the selected Salesforce record. You can find the email in the record's Activity History.



Logging events using Salesforce extensions

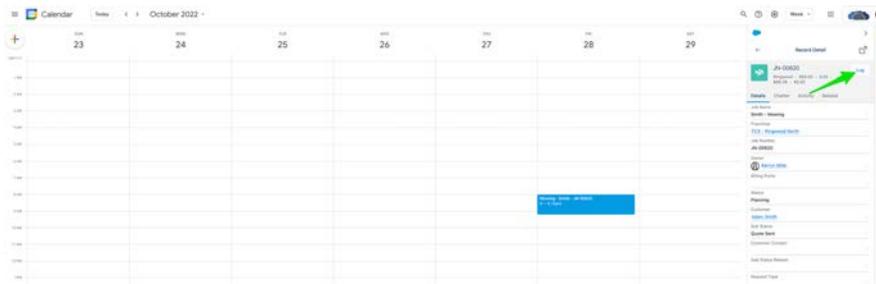
If automatic event syncing is not configured from your personal calendar back to the Salesforce calendar (check with your system administrator) you may still be able to manually log events using the Salesforce extension.

To log an event to a Salesforce record

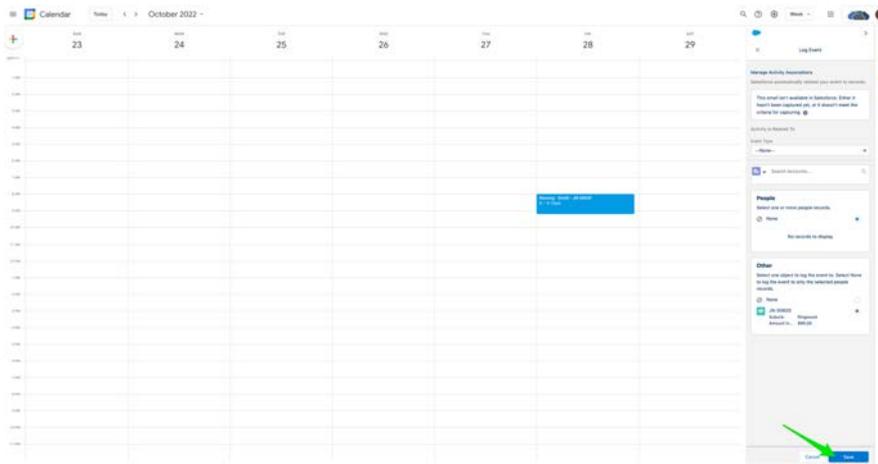
1. In your personal calendar select the event, then search for the appropriate record within the Salesforce search pane.



2. With the correct record in view, press the Log button.

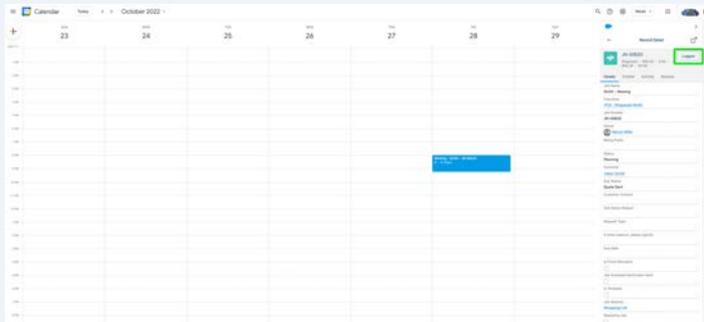


3. Now press **Save**.



Congratulations

The event is logged to Salesforce.



CHAPTER 12

Working with Material Price Lists

Understanding material price lists	cdxvii
Creating a material price list	cdxviii
Adding a material	cdxx
Moving a material between price lists	cdxxii

Understanding material price lists

Material Price Lists support job costing and estimation.

They are used in the Job Planning process to provide a ready menu of materials that are regularly used (with the pricing provided by particular suppliers). This feature supports up-front estimation of job profitability by enabling the franchisee to estimate the gross profit of each job.

The screenshot displays the Salesforce Job Planning interface. At the top, there is a navigation bar with tabs for Business Management, Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Job Planning, and More. Below this, a summary row shows Job Number JN-00166, Estimated Labour Price \$240.00, and Estimated Material Price \$682.50. The main content area is titled 'Roofing' and contains several sections:

- Job Tasks (1):** A table with columns NAME, DESCRIPTION, and TOTAL. It lists 'Doing th...' with a total of \$240.00.
- Job Materials (2):** A table with columns DESCR..., QUANTITY, and TOTAL. It lists two items: one with a quantity of 35.0 and a total of \$682.50, and another with a quantity of 0.0 and a total of 5.00.
- Roofing Material Selection:** A search box containing 'Yellow' with a green arrow pointing to it. Below the search box, a list of materials is shown, with 'MN-00001 Dulux • 10 • Yellow Paint • 55.00' highlighted in a green box.
- Roofing Summary:** A table showing Amount \$922.50, Tax 10%, Cost \$675.00, Profit \$247.50, and Total \$1,014.75.
- Labour Summary:** A table showing Cost \$150.00, Amount \$240.00, and Profit \$90.00.

Each price list is created for a specific supplier. Multiple suppliers requires multiple price lists.

You can create your own price lists which supplement the material price lists published by your franchisor.



If the franchisor already provides a material price list, you could add a code to the Product Name to identify the item as “yours.” This helps to distinguish between “own prices” and prices provided by the franchisor.

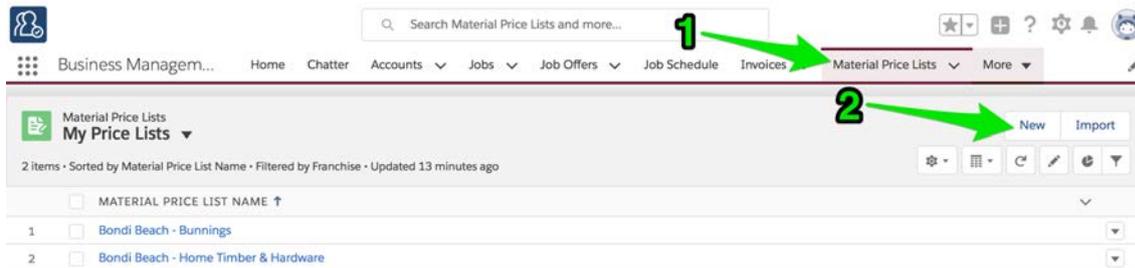
Creating a material price list

Each price list contains items from a single supplier. When you add a new supplier, you should consider adding a new price list for that supplier.

Some price lists may be shared between multiple companies, while other price lists are owned by the franchisee. Franchisees own any price lists they create.

To create a price list

1. From the **Material Price Lists** tab, press **New**.



The **New Material Price** list dialog box displays.

2. Enter the Material Price List Name, the Franchise, and the Supplier, then press **Save**.

New Material Price List

Information

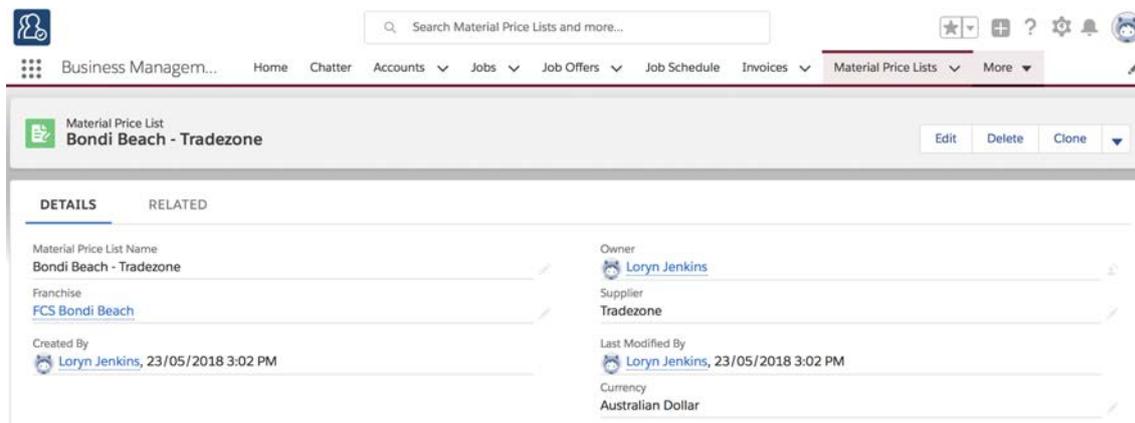
* Material Price List Name <input type="text" value="Bondi Beach - Tradezone"/>	Owner Loryn Jenkins
* Franchise <input type="text" value="FCS Bondi Beach"/>	Supplier <input type="text" value="Tradezone"/>

System Information

Currency



The new price list displays.



The screenshot shows the 'Business Management' software interface. At the top, there is a search bar and navigation tabs including 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Material Price Lists', and 'More'. The 'Material Price Lists' tab is active, displaying a list of price lists. The first entry is 'Material Price List Bondi Beach - Tradezone'. Below this, the 'DETAILS' section shows the following information:

Material Price List Name Bondi Beach - Tradezone	Owner Loryn Jenkins
Franchise FCS Bondi Beach	Supplier Tradezone
Created By Loryn Jenkins , 23/05/2018 3:02 PM	Last Modified By Loryn Jenkins , 23/05/2018 3:02 PM
	Currency Australian Dollar

Adding a material

Once you have created a price list, you will want to add the most commonly purchased items from that supplier to the price list.



Infrequently used items can be added when they are first used. You can add any item as needed while creating a Job Plan. See “How to add a new material to a price list” on page cxlviii.

To add a material to a price list

1. From the **Material Price List**, select the **Related** tab.

The screenshot shows the 'Material Price List' page for 'Bondi Beach - Tradezone'. The 'RELATED' tab is selected and highlighted with a green arrow. The page displays the following details:

Material Price List Name Bondi Beach - Tradezone	Owner Loryn Jenkins
Franchise FCS Bondi Beach	Supplier Tradezone
Created By Loryn Jenkins , 23/05/2018 3:02 PM	Last Modified By Loryn Jenkins , 23/05/2018 3:02 PM
	Currency Australian Dollar

2. From the **Materials** section, press **New**.

The screenshot shows the 'Materials (0)' section of the 'Material Price List' page. A green arrow points to the 'New' button in the bottom right corner of the materials list area.

The **New Material** dialog box displays.

3. Enter all the relevant material details.

New Material

Information

Material Number	Price 13.00
* Product Name 36 Watt BSD Series LED - Frosted Diffuser - White	Currency Australian Dollar
Quantity Unit Of Measure Each	Safety Data Sheet Issue Date
Size	Safety Data Sheet Product Name
Supplier Davis Lighting	Safety Data Sheet Required <input type="checkbox"/>
Supplier Part Number BSD4364K	
Description 36 Watt BSD Series LED Slimline Batten IP40 With Frosted Diffuser 4000K 4320lm White	
* Material Price List Bondi Beach - Tradezone	

Cancel Save & New Save



The new material record is added to the price list.

Business Management... Home Chatter Accounts Jobs Job Offers Job Schedule Invoices Material Price Lists More

Material Price List
Bondi Beach - Tradezone

DETAILS RELATED

Materials (1)

MATERIAL NUMBER	PRODUCT NAME	QUANTITY UNIT OF MEASURE	DESCRIPTION
MN-00015	36 Watt BSD Series LED - Frosted Diffuse...	Each	36 Watt BSD Series LED Slimline Batten L...

View All

Moving a material between price lists

To move a material between price lists

1. Locate the material, either by searching for it, or by finding it on the **Related** tab of a material price list.
2. Edit the **Material Price List** field to switch the material from the current price list to a new one.

The screenshot shows the Salesforce interface for a material record. The record ID is MN-00018. The 'Material Price List' field is highlighted with a green box and contains the value 'Bunnings'. Other fields include Material Number, Product Name, Quantity Unit Of Measure, Size, Supplier, Supplier Part Number, Description, Price, Currency, Safety Data Sheet Issue Date, Safety Data Sheet Product Name, and Safety Data Sheet Required. The record was created by John Smith on 19/06/2018 at 4:57 PM and last modified by John Smith on 20/06/2018 at 9:53 AM.

Field	Value
Material Number	MN-00018
Product Name	Box of screws - 50
Quantity Unit Of Measure	Each
Size	
Supplier	Screw Supplier
Supplier Part Number	10000000
Description	Screws - 15mm Phillips head
Material Price List	Bunnings
Price	\$8.50
Currency	AUD - Australian Dollar
Safety Data Sheet Issue Date	
Safety Data Sheet Product Name	
Safety Data Sheet Required	<input type="checkbox"/>

CHAPTER 13

Xero Integration

Understanding Xero integration	cdxxv
What data is exchanged	cdxxv
When data is exchanged	cdxxv
How to connect to Xero	cdxxvi
How to upgrade to OAuth 2.0	cdxxxiv
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Types of sync records	cdxxxvii
How to find the most recent sync	cdxl
How to update an invoice after it is created	cdxlii
How to perform end of month reconciliation	cdxlvii

Understanding Xero integration

Business Management's Financial Integration provides the ability to connect Salesforce financial information with Xero. This allows franchisees to take advantage of the strengths of Salesforce and Business Management, while also providing the financial reporting, controls and compatibility with software required by book keepers and accountants.

What data is exchanged

Business Management exchanges the following financial records

- » Accounts
- » Invoices
- » Payments
- » Credit Notes
- » Credit Allocations

This data is replicated from Salesforce to Xero. Changes made in Xero are synchronized back to Salesforce.



Supplier Invoices can optionally be sent to Xero. Supplier Invoices don't sync back from Xero to Salesforce.

When data is exchanged

When you create a new invoice, payment, credit note or credit allocation in a Job owned by a Franchise Profile Account that is connected to Xero, the sync to Xero occurs almost immediately. Customer Accounts are transferred to Xero with the account's first invoice.

When you create a new invoice, payment, credit note or credit allocation in a Xero account that is connected to Business Management, changes are replicated back to Business Management in the next sync cycle. The frequency of the sync cycle is determined by the configuration set by your franchisor.

How to connect to Xero

You will need your own Xero account and have on hand your Xero username and password to connect Business Management to Xero.



If you manage more than one franchise, you may wish to connect each Franchise Profile Account to a single Xero account. This will allow you to consolidate your accounting. To do this, simply perform the following procedure for each Franchise Profile Account.

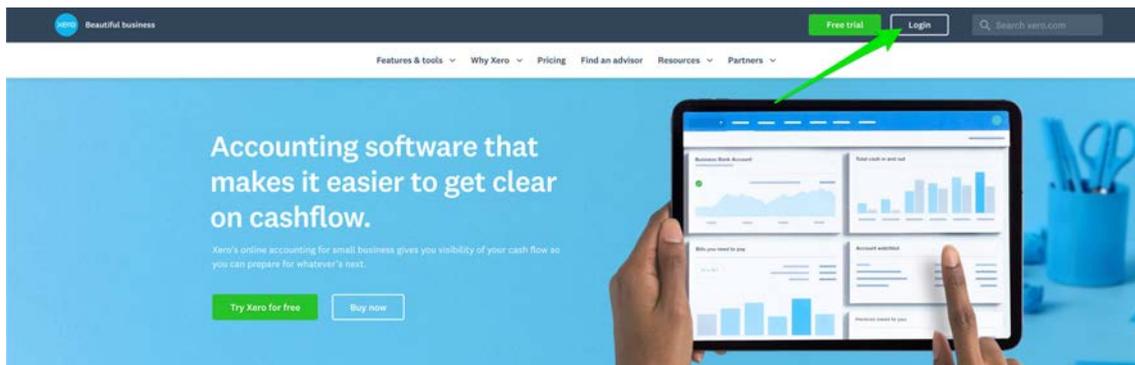
To connect your Master Franchise Profile Account to Xero

1. In your browser, login to Xero.
2. From Salesforce, connect your Franchise Profile Account to Xero.

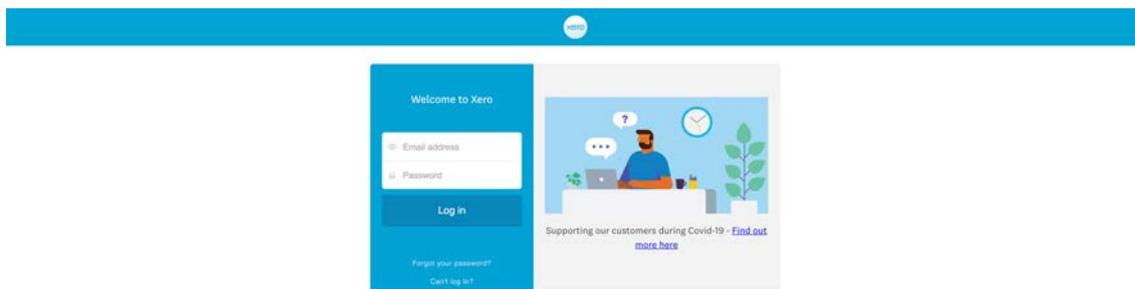
How to do this is described below.

To login to Xero

1. Go to the Xero website www.xero.com.au and click the **Login** button.



2. Now enter your Email address and Password then press **Log in**.



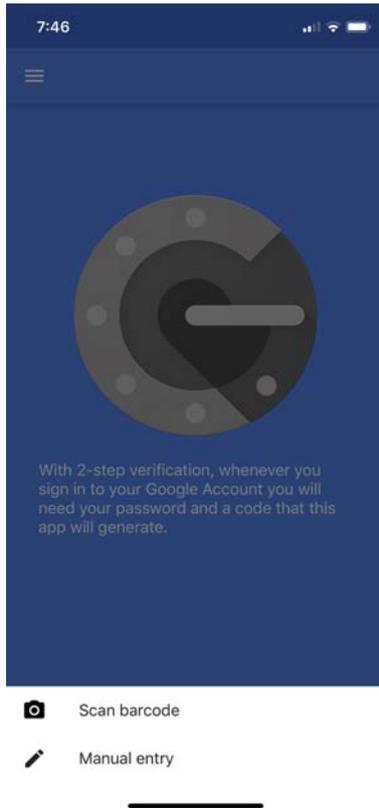
3. Xero may prompt you to set up two-step authentication. Press **Set up two-step authentication** to continue.



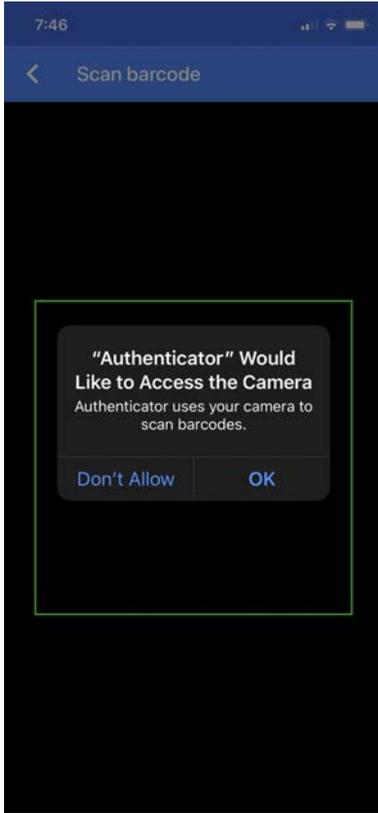
4. If you don't already have the Google Authenticator app on your mobile phone, go to the App Store (for iPhone) or Google Play (for Android) and download the Google Authenticator app.



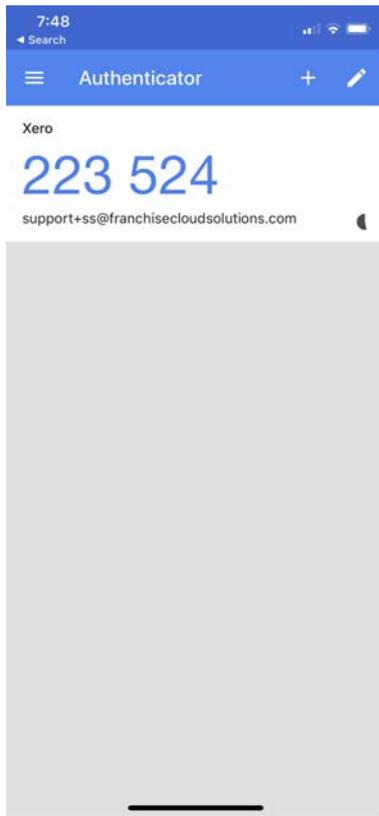
5. If this the first time you've used Google Authenticator, tap **Begin Setup** (otherwise, tap the + button) then tab **Scan barcode**.



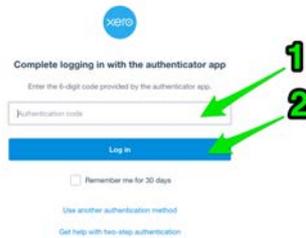
6. If this is the first time you've used Google Authenticator, you may need to grant permission to use your camera. Press **OK**.



- Now point the camera at the QR code on the screen. The camera will recognize the code and create the authentication key on your phone. The authentication key shows a time-limited code that changes regularly.



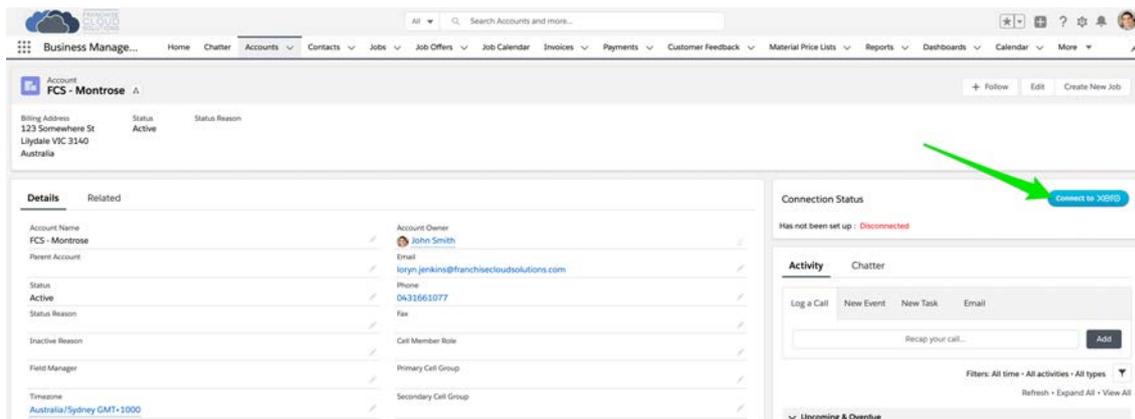
- Enter the six digit code and press **Log in**.



- Having logged into your Xero account, you're now ready to connect your Franchise Profile Account to Xero.

To connect to Xero

1. From your **Franchise Profile Account**, press the **Connect to Xero** button.



The **Welcome to Xero** login page appears.

2. Press the **Allow Access** button. Doing so gives permission for your Business Management account to synchronize financial data with your Xero account. Changes and additions to data in Xero will be synchronized back into Salesforce.



Your **Franchise Profile Account** displays and the **Account Code Mapping Setup** dialog box appears.

3. Select appropriate values for the **Account Code Mapping Setup** and press **Save**.

Account Code Mapping Setup

* Default Account Code Invoice/Credit Note Lines: 11000-00 - Sales

* Default Account Code Payments/Credit Allocations: 66000-00 - Receivables

* Default Account Code Supplier Invoice: 22000-00 - Cost of Goods Sold

* Credit Note Status: AUTHORISED

* Invoice Status: AUTHORISED

* Revenue Inc Tax Code: GST on Income

* Revenue Exempt Tax Code: GST Free Income

* Expense Inc Tax Code: GST on Expenses

* Expense Exempt Tax Code: GST Free Expenses

* Select Currency

Enabled Currencies: (empty)

Selected Currencies: Australian Dollar

Buttons: Cancel, Save



The above image shows a mapping to an edited Xero chart of accounts. When you edit your Xero chart of accounts, you can review the mapping to ensure Business Management is still pushing to the right accounts.

4. Your Business Management account is now connected.

Business Management... Home Chatter Accounts Contacts Jobs Job Offers Job Calendar Invoices Payments Customer Feedback Material Price Lists Reports Dashboards Calendar More

Account: FCS - Montrose

The financial system has been setup successfully.

Account Owner: John Smith

Parent Account: loryn.jenkins@franchisecloudsolutions.com

Status: Active

Phone: 0431661077

Field Manager: Primary Cell Group

Connection Status - OAuth 2.0: FCS Montrose : Connected

Buttons: View Mapping, Disconnect



Now that your Xero account is connected, financial data you enter into Business Management is automatically transferred to your Xero account. Information you enter into Xero is synchronized back to Business Management periodically. How frequently this occurs depends on your franchisor's chosen synchronization schedule. Check with your franchisor for more information on how they have configured synchronization between Business Management and Xero.



If at any time you need to revise the mapping for a connected account, simply press **View Mapping**. You will be able to edit and save the mapping while it is still connected.

How to upgrade to OAuth 2.0



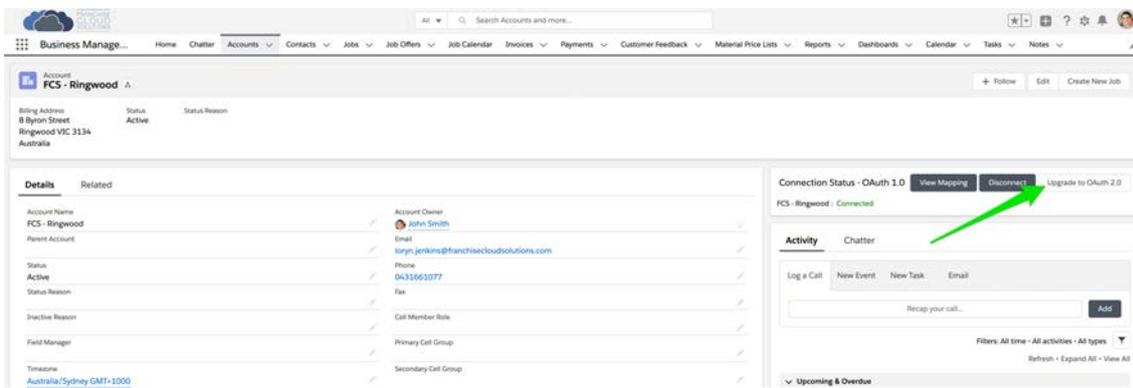
OAuth 2.0 is a new and improved way to connect to Xero.

For those whose account has already been connected to Xero, you need to perform a one-time upgrade to begin using OAuth 2.0. Follow the instructions below.

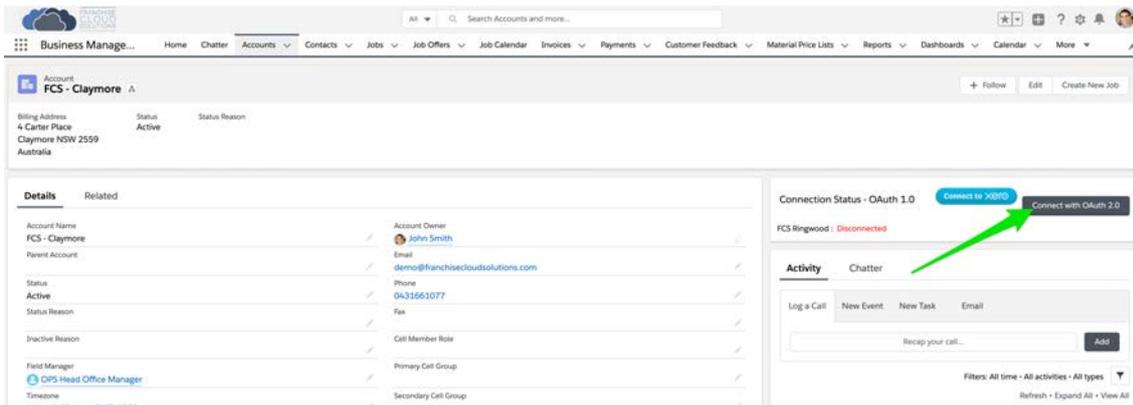
For those who have never connected to Xero, See “How to connect to Xero” on page cdxxvi.

To upgrade an existing connection to OAuth 2.0

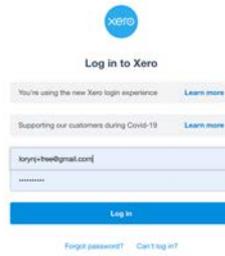
1. When your Franchise Profile Account is currently connected to Xero, press the Upgrade to OAuth 2.0 button.



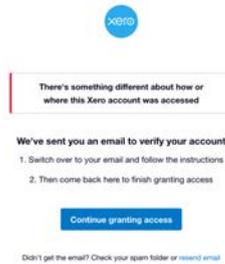
2. Alternatively, when your connection is Disconnected, press the Connect with OAuth 2.0 button.



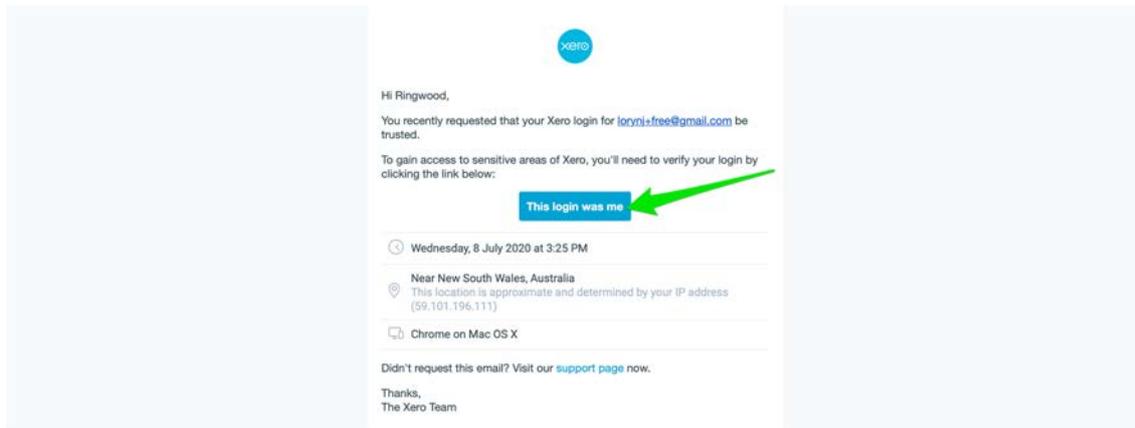
3. Now you are shown a login prompt. Enter your username and password (or accept the suggested username and password), then press **Log in**.



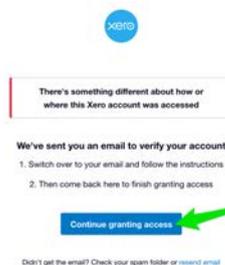
4. If there has been a change in your system (e.g. changing your browser) you may be asked to verify your identity. If you see this, go check your email.



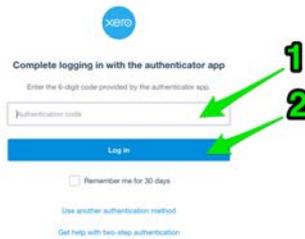
5. Open the email Xero send you and press the **This login was me** button.



6. Now go back to your browser and press the **Continue granting access** button.

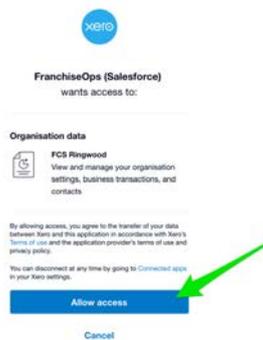


7. If you have previously set up a two-step login, open Google Authenticator on your phone and enter the six digit code, then press **Log in**.

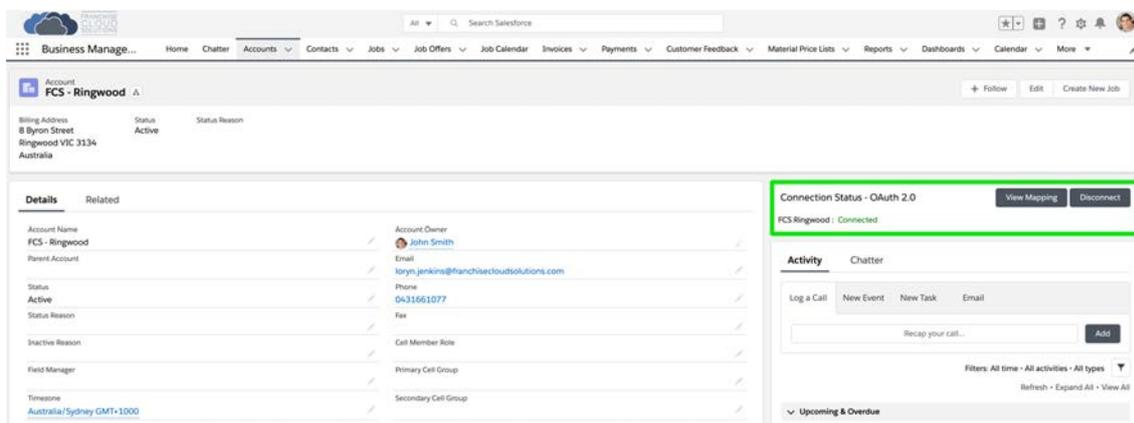


If you have never set up a two step login, you will need to set one up now. See “To login to Xero” on page cdxxvi.

8. You are now logged into your Xero account. Grant Salesforce access to your Xero account by pressing **Allow access**.



9. Congratulations! Your Franchise Profile Account is now connected to Xero.



Any invoices you create will now be synced to Xero. Any payments you enter into Xero will be synced back to the Salesforce invoice on a regular schedule. (The schedule is often set to every 15 minutes, but may be different in your implementation.)

Understanding syncing and sync records

Sync Statuses

When you are connected to Xero, your financial records will have an icon showing the sync status of that record. Business Management works by pushing financial information to the financial system and then pulling it back.

Changes in Business Management are immediately pushed to Xero.

Business Management checks periodically to see if data has been changed within Xero. If data has changed then it is pulled back to Business Management.

The results of each push to and pull from the financial system are tracked within the Syncs records attached to the Franchise Profile Account.

The following table describes the meaning of each sync status.

Icon	Meaning
	Sync has not been attempted.
	The record has been pushed to the financial system and pulled back successfully.
	The record has been pushed to the financial system but not yet pulled back from it.
	The record has been pulled from the financial system.
	Attempt to push the record to the financial system has failed.

Types of sync records

There are three types of Sync records.

» Automated Sync Request records.

The screenshot shows a Salesforce record for Sync S011895. The record is categorized as 'Automated' and has a 'Parent Sync' field that is empty. The 'Details' section includes fields for Sync Name, Request Sent Time, Response Received Time, Error Message, Parent Sync, Type, Created By, Currency, Franchise, Invoice, Sync Status, Number Of Records, From Date, To Date, Owner, and Last Modified By. The 'Activity' section shows filters and options for Next Steps and Past Activities.

Field	Value
Sync Name	S011895
Request Sent Time	
Response Received Time	
Error Message	
Parent Sync	
Type	Automatic
Created By	Integration User, 16/08/2018 1:33 PM
Currency	Australian Dollar
Franchise	FCS Ringwood
Invoice	
Sync Status	Succeeded
Number Of Records	
From Date	16/08/2018 1:18 PM
To Date	16/08/2018 1:33 PM
Owner	Integration User
Last Modified By	Integration User, 16/08/2018 1:33 PM

These are the automatic syncs that occur on the schedule set by the franchisor. They have no parent. You recognize an automatic Sync by looking at its `Type`. You recognize it as a Request record by observing that the `Parent Sync` field is empty.

» Manual Sync Request records.

The screenshot shows a Salesforce record for Sync S011914. The record is categorized as 'Manual' and has a 'Parent Sync' field that is empty. The 'Details' section includes fields for Sync Name, Request Sent Time, Response Received Time, Error Message, Parent Sync, Type, Created By, Currency, Franchise, Invoice, Sync Status, Number Of Records, From Date, To Date, Owner, and Last Modified By. The 'Activity' section shows filters and options for Next Steps and Past Activities.

Field	Value
Sync Name	S011914
Request Sent Time	
Response Received Time	
Error Message	
Parent Sync	
Type	Manual
Created By	Loryn Jenkins, 16/08/2018 2:01 PM
Currency	Australian Dollar
Franchise	FCS Ringwood
Invoice	
Sync Status	Succeeded
Number Of Records	
From Date	16/08/2018 1:48 PM
To Date	16/08/2018 1:58 PM
Owner	Loryn Jenkins
Last Modified By	Loryn Jenkins, 16/08/2018 2:01 PM

These are Sync operations initiated by a system administrator. You can recognize them by seeing they are of `TypeManual`, and the `Parent Sync` field is empty.

» Child Sync Response records.

The screenshot shows the Salesforce Business Management interface for a Sync record with ID S011900. The interface is divided into three main sections: RELATED, DETAILS, and ACTIVITY. The DETAILS section is currently active and displays various fields for the Sync record. The 'Parent Sync' field is highlighted with a green box and contains the value 'S011895'. Other fields include Sync Name (S011900), Franchise (FCS Ringwood), Sync Status (Succeeded), and Created By (Integration User, 16/08/2018 1:33 PM). The ACTIVITY section shows filters and options for Next Steps and Past Activities.

RELATED	DETAILS
Sync Name S011900	Franchise FCS Ringwood
Request Sent Time	Invoice
Response Received Time	Sync Status Succeeded
Error Message	Number Of Records
Parent Sync S011895	From Date
Type	To Date
Created By Integration User, 16/08/2018 1:33 PM	Owner Integration User
Currency Australian Dollar	Last Modified By Integration User, 16/08/2018 1:33 PM

Each Request record has one or more child Response records associated with it. Each Response record is a child of the Request record. You recognize a Response record because it has the name of its parent within the Parent Sync field.

How to find the most recent sync



This topic assumes you have connected your Xero account. See “How to connect to Xero” on page cdxxvi.

Synchronization occurs automatically based on a schedule configured by your franchisor. Syncs can also be manually initiated by system administrators. You can check the most recent sync history from your Account.

To check the most recent sync period

1. From your **Account**, select the **Related** tab.

The screenshot shows the Salesforce Business Manager interface for the 'FCS Ringwood' account. The 'Related' tab is selected, and a green arrow points to it. The interface displays account details, connection status, and activity logs.

Type	Phone	Website	Account Owner	Account Site	Industry
	0404 303 808		Ringwood Franchisee		

Details | **Related** (indicated by green arrow)

Account Name: FCS Ringwood
Master Franchise: VIC Master
Status: Active
Status Reason: [edit]
Inactive Reason: [edit]
Field Manager: [edit]
Timezone: Australia/Melbourne

Account Owner: Ringwood Franchisee
Email: loryn.jenkins@franchisecloudsolutions.com
Phone: 0404 303 808
Fax: [edit]
Cell Member Role: [edit]
Primary Cell Group: [edit]
Secondary Cell Group: [edit]

Connection Status: FCS Ringwood : Connected
Buttons: View Mapping, Disconnect

Activity | Chatter
Email: [input field]
Create new... [Add]
Filters: All time · All activities · All types
Refresh Expand All

Next Steps: More Steps

2. Scroll down to the **Syncs** section, then press **View All**.

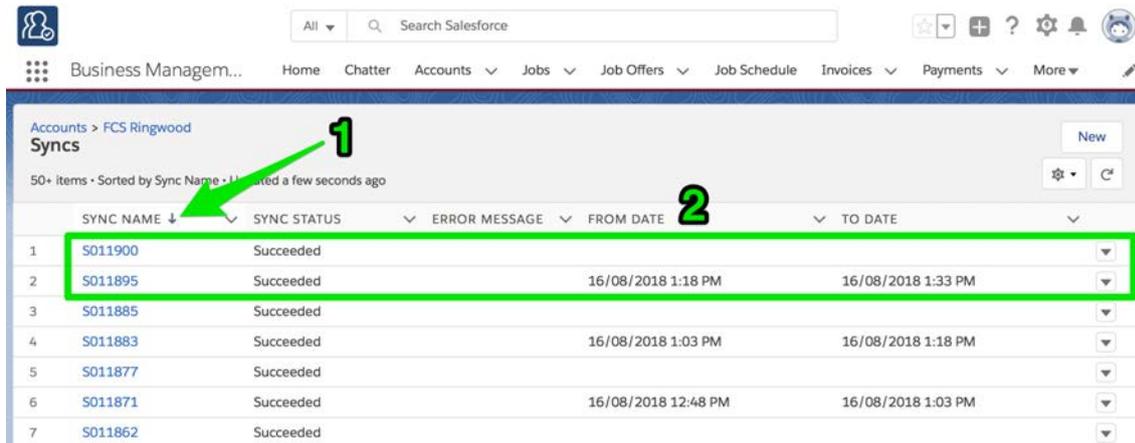
The screenshot shows the Salesforce Business Manager interface for the 'FCS Ringwood' account. The 'Syncs' section is visible, displaying a table of sync records. A green arrow points to the 'View All' link at the bottom of the table.

Syncs (6+) [New]

SYNC NAME	SYNC STATUS	ERROR MESSAGE	FROM DATE
S011052	Succeeded		
S011053	Succeeded		
S011062	Succeeded		15/08/2018 5:33 PM
S011065	Succeeded		
S011072	Succeeded		15/08/2018 5:48 PM
S011075	Succeeded		

[View All](#) (indicated by green arrow)

3. Click on the Sync Name column to order newest to oldest.



The screenshot shows the Salesforce Business Management interface for 'Accounts > FCS Ringwood Syncs'. The table is sorted by Sync Name. The first row is highlighted with a green box, and the 'SYNC NAME' column header is indicated by a green arrow labeled '1'. The 'FROM DATE' and 'TO DATE' columns are labeled with a green '2'.

	SYNC NAME	SYNC STATUS	ERROR MESSAGE	FROM DATE	TO DATE
1	S011900	Succeeded			
2	S011895	Succeeded		16/08/2018 1:18 PM	16/08/2018 1:33 PM
3	S011885	Succeeded			
4	S011883	Succeeded		16/08/2018 1:03 PM	16/08/2018 1:18 PM
5	S011877	Succeeded			
6	S011871	Succeeded		16/08/2018 12:48 PM	16/08/2018 1:03 PM
7	S011862	Succeeded			

The most recent set of syncs is given by the latest Sync records.

4. Check the From Date and the To Date in the most recent automated sync to determine when the most recent sync occurred.

How to update an invoice after it is created

When an invoice is created in an account that is synced with Xero, the sync occurs as soon as it is created. Sometimes you need to change some details on the invoice within Salesforce and then send to the financial system. Other times, you may change some details within the financial system, and then want to immediately make further changes within Salesforce. When this happens, it is useful to send the invoice to the financial system or to pull the invoice from the financial system. This can ensure both systems have the most up-to-date detail.



You can update an invoice to the financial system after the first sync and before any payments are recorded.

To send changes to the financial system

1. Start with an invoice whose details you want to change.

The screenshot displays the Salesforce interface for an invoice record. At the top, there is a navigation bar with 'Business Manage...' and various menu items like 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. A search bar is also present. Below the navigation bar, the invoice record for 'INV-00007' is shown. The record includes a 'Sync Status' icon, 'Invoice Number' (INV-00007), 'Invoice Date' (21/08/2018), 'Due Date' (21/08/2018), 'Type' (Full), 'Status' (Open), 'Account' (Mark Williams), and 'Reference'. The 'Owner' is 'Ringwood Franchisee'. Financial details include 'Amount' (AUD 175.00), 'Tax Amount' (AUD 17.50), and 'Amount Inc Tax' (AUD 192.50). There are also checkboxes for 'Tax Exempt' and 'Has been emailed?'. Action buttons include '+ Follow', 'Edit', 'Clone', 'Delete', 'Send To Financial System', and 'Pull From Financial System'. The 'Activity' section on the right shows an 'Email' button, a 'Create new...' button, and an 'Add' button. Below this, there are sections for 'Next Steps' and 'Past Activities', both indicating no activity.

2. Now make a change to it.

The screenshot shows the Salesforce Business Management interface for an invoice record. The invoice number is INV-00007. The invoice date is 22/08/2018 and the due date is 22/08/2018. The amount inc tax is AUD 192.50. The status is Open. The owner is Ringwood Franchisee. The interface includes a navigation menu at the top, a search bar, and various action buttons like 'Follow', 'Edit', 'Clone', 'Delete', 'Send To Financial System', and 'Pull From Financial System'. The invoice details are visible, including the invoice date (22/08/2018) and due date (22/08/2018), which are highlighted with a green box.

After making the change, you will want to update it in the financial system.

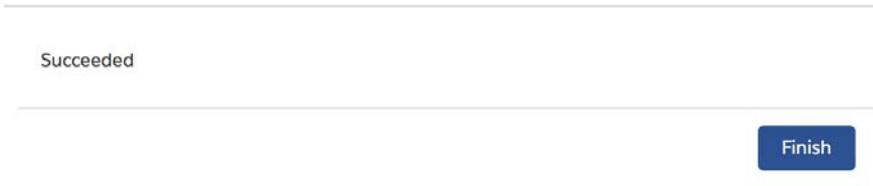
3. From the Invoice, press **Send to Financial System**.

The screenshot shows the same Salesforce Business Management interface for the invoice record. A green arrow points to the 'Send To Financial System' button in the top right corner of the record header. The invoice details are visible, including the invoice date (22/08/2018) and due date (22/08/2018). The interface includes a navigation menu at the top, a search bar, and various action buttons like 'Follow', 'Edit', 'Clone', 'Delete', 'Send To Financial System', and 'Pull From Financial System'.

The **Send to Financial System** dialog box appears.

4. Press Finish.

Send To Financial System



The Invoice has now been updated in the financial system.

Invoice INV-00007

Account: [Mark Williams](#) | Invoice Date: 22/08/2018 | Amount Inc Tax: AUD 192.50 | Status: Open

Details | Related

Sync Status	Owner
	Ringwood Franchisee
Invoice Number	Amount
INV-00007	AUD 175.00
Invoice Date	Tax Amount
22/08/2018	AUD 17.50
Due Date	Amount Inc Tax
22/08/2018	AUD 192.50
Type	Tax Exempt
Full	<input type="checkbox"/>
Status	Job
Open	JN-00061
Account	Has been emailed?
Mark Williams	<input type="checkbox"/>
Reference	

Activity | Chatter

Email

Create new...

Filters: All time · All activities · All types

Refresh Expand All

Next Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

No past activity. Past meetings and tasks marked as done show up here.

To retrieve changes from the financial system

1. Start with the invoice whose details have been changed in Xero.

The screenshot shows the Salesforce Business Manager interface for an invoice record. The top navigation bar includes 'Business Manage...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', and '* Job Planning'. The main content area displays the invoice details for 'INV-00009' with the following information:

Account	Invoice Date	Amount Inc Tax	Status
Mark Williams	4/01/2019	AUD 1,680.00	Open

The 'Details' panel shows the following fields:

Field	Value
Sync Status	Synced
Invoice Number	INV-00009
Invoice Date	4/01/2019
Due Date	4/01/2019
Type	Full
Status	Open
Account	Mark Williams
Reference	JN-00095

The 'Activity' panel shows an 'Email' section with a 'Create new...' button and an 'Add' button. Below this, there are sections for 'Next Steps' and 'Past Activities', both indicating no activity.

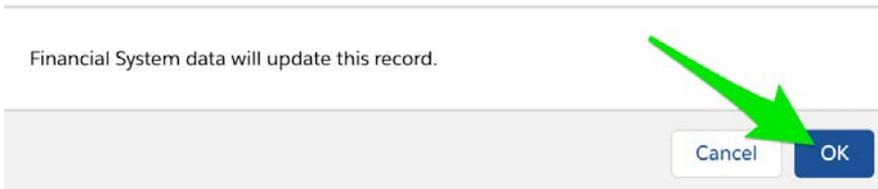
2. Press Pull from Financial System.

This screenshot is identical to the previous one, but with a green arrow pointing to the 'Pull From Financial System' button in the top right corner of the invoice record header. The button is located next to the 'Send To Financial System' button.

The Pulling this record dialog box appears.

3. Press OK.

Pulling this record



4. The system retrieves and updates the invoice record.

Business Manage... Home Chatter Accounts Jobs Job Offers Job Schedule Invoices * Job Planning More

Invoice INV-00009

This record has been updated successfully.

Account	Invoice Date	Amount Inc Tax	Status
Mark Williams	4/01/2019	AUD 1,540.00	Open

Details Related

Sync Status:

Invoice Number: INV-00009

Invoice Date: 4/01/2019

Due Date: 4/01/2019

Type: Full

Status: Open

Account: Mark Williams

Reference: JN-00095

Owner: Loryn Jenkins

Amount: AUD 1,400.00

Tax Amount: AUD 140.00

Amount Inc Tax: AUD 1,540.00

Tax Exempt:

Job: JN-00095

Has been emailed?:

Activity Chatter

Email: Add

Filters: All time · All activities · All types

Next Steps: More Steps

No next steps. To get things moving, add a task or set up a meeting.

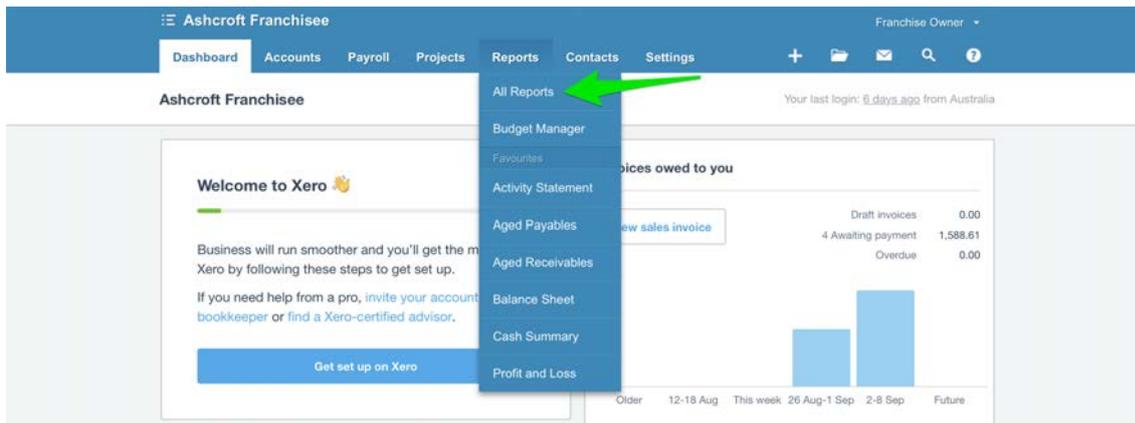
Past Activities: No past activity. Past meetings and tasks marked as done show up here.

How to perform end of month reconciliation

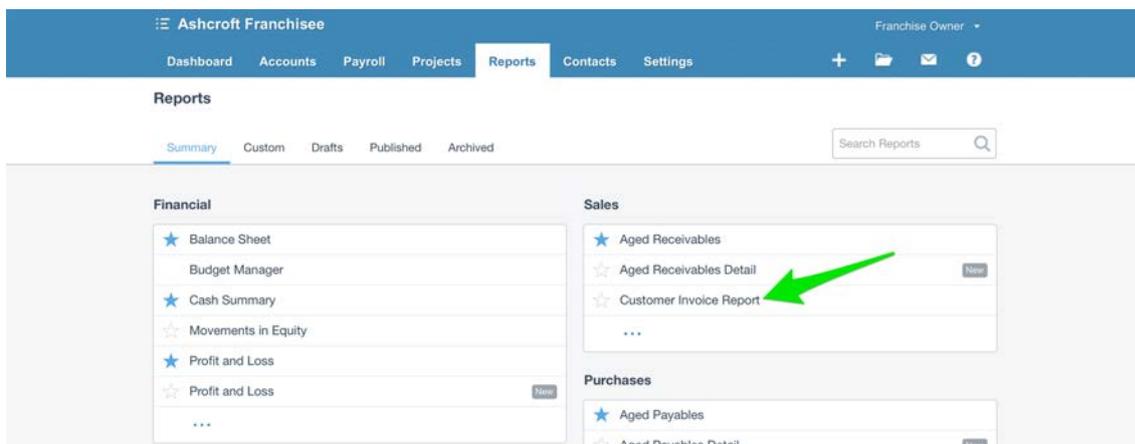
Performing an end of month reconciliation involves comparing the invoice report provided by Xero with the invoice report for Franchise Owners available within Business Management.

To obtain the Xero end of month report

1. Log into your Xero account.
2. From the **Reports** menu, choose **All Reports**.



3. From the **Reports** dashboard, choose the **Customer Invoice Report**.



- Modify the parameters to suit and press the **Update** button. The report appears on-screen and can be exported.

Customer Invoice Report (Australian Dollar)

Ashcroft Franchisee
From 01 August 2018 to 31 August 2018

Invoice Number	Reference	Type	To	Date	Due Date	Expected Date	Paid Date	Invoice Total	Paid	Due	Sent	Status
INV-00001	JN-00058	INV	Kylie Scott	15 Aug 2018	29 Aug 2018		15 Aug 2018	1,088.45	495.00	593.45	Unsent	Awaiting Payment
INV-00002	JN-00057	INV	Franklin Smith	21 Aug 2018	4 Sep 2018			578.16	0.00	578.16	Unsent	Awaiting Payment
INV-00003	JN-00056	INV	Dianna Ross	21 Aug 2018	4 Sep 2018			182.71	0.00	182.71	Unsent	Awaiting Payment
INV-00004	JN-00056	INV	Dianna Ross	21 Aug 2018	4 Sep 2018			234.29	0.00	234.29	Unsent	Awaiting Payment
Page Total								2,083.61	495.00	1,588.61		
Report Total								2,083.61	495.00	1,588.61		

Page 1 of 1 (4 total items) | Showing 100 items per page

To obtain the Business Management end of month report

- From the **Salesforce** menu, select **Reports**.

Business Management... Home Chatter Accounts Jobs Job Offers Job Schedule Invoices Payments Contacts **More**

Assistant

- Customer Feedback
- Files
- Reports**
- Dashboards
- Calendar
- Tasks
- Notes

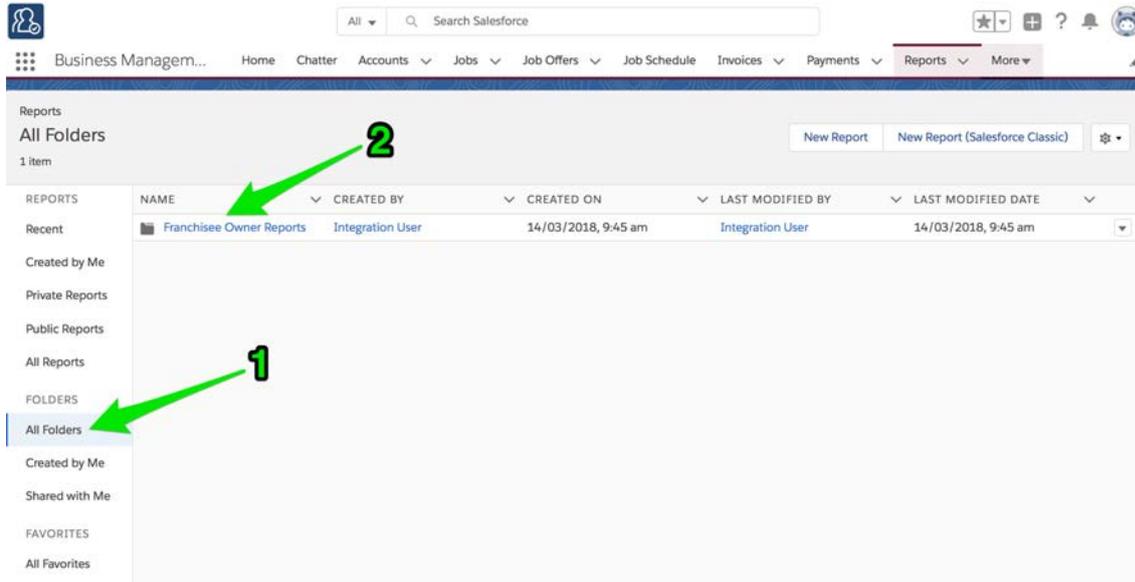
Nothing needs your attention at the moment. Check back later.

Quarterly Performance
CLOSED 0 OPEN (+70%) 0 GOAL --

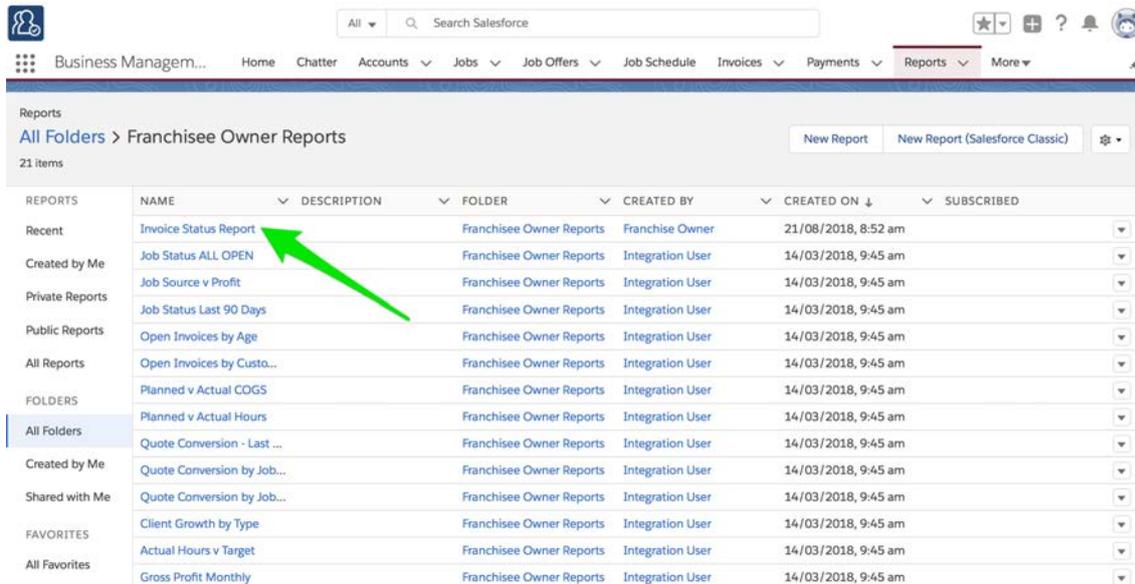
To see your opportunity-related data, contact your Salesforce admin.

Closed Goal Closed + Open (+70%)

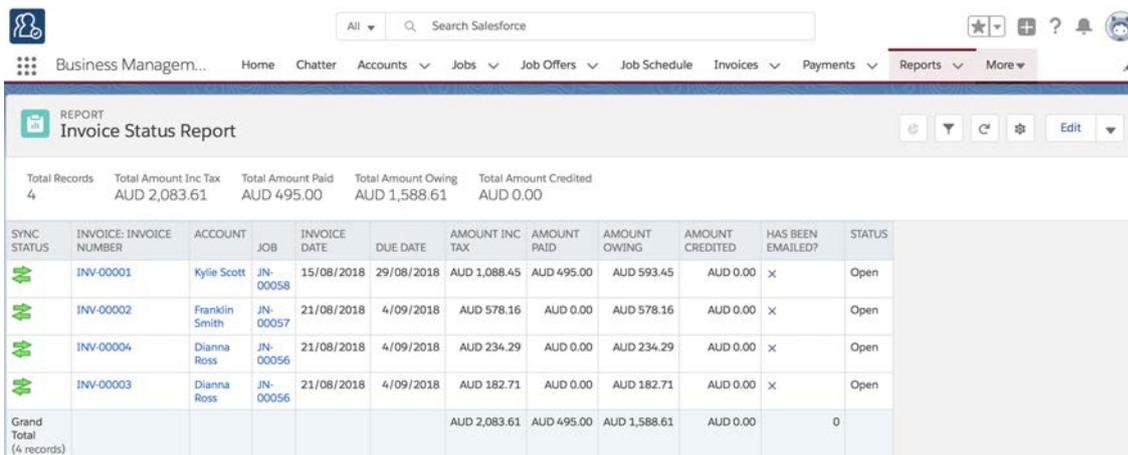
- From the Reports page, go to All Folders and select Franchise Owner Reports folder.



- Now select the Invoice Status Report.



4. The data for the current month appears. You can export as needed.



REPORT
Invoice Status Report

Total Records: 4
Total Amount Inc Tax: AUD 2,083.61
Total Amount Paid: AUD 495.00
Total Amount Owing: AUD 1,588.61
Total Amount Credited: AUD 0.00

SYNC STATUS	INVOICE: INVOICE NUMBER	ACCOUNT	JOB	INVOICE DATE	DUE DATE	AMOUNT INC TAX	AMOUNT PAID	AMOUNT OWING	AMOUNT CREDITED	HAS BEEN EMAILED?	STATUS
	INV-00001	Kylie Scott	JN-00058	15/08/2018	29/08/2018	AUD 1,088.45	AUD 495.00	AUD 593.45	AUD 0.00	x	Open
	INV-00002	Franklin Smith	JN-00057	21/08/2018	4/09/2018	AUD 578.16	AUD 0.00	AUD 578.16	AUD 0.00	x	Open
	INV-00004	Dianna Ross	JN-00056	21/08/2018	4/09/2018	AUD 234.29	AUD 0.00	AUD 234.29	AUD 0.00	x	Open
	INV-00003	Dianna Ross	JN-00056	21/08/2018	4/09/2018	AUD 182.71	AUD 0.00	AUD 182.71	AUD 0.00	x	Open
Grand Total (4 records)						AUD 2,083.61	AUD 495.00	AUD 1,588.61	AUD 0.00	0	



Use the filter button to reset the reporting period to suit.

To reconcile the monthly reports

1. Compare the totals of the two reports to check that they match.
2. Examine the detail in the case that there is any discrepancy and make changes to bring the two systems into reconciliation.

cdli

CHAPTER 14

Working with Customer Feedback

Understanding customer feedback	cdliii
How to remove someone from job satisfaction surveys	cdliv

Understanding customer feedback

Business Management supports gathering customer feedback. There are two types of customer feedback supported by Business Management

- » feedback from job satisfaction surveys
- » unsolicited complaints or compliments about the service.

The franchisor may choose to run the job satisfaction customer feedback program by randomly sampling a portion of customers whose jobs have recently completed.



Customer feedback programs are a really useful way of receiving feedback that you may not be able to get any other way. Customers often don't tell you directly what they think face to face. They are often more willing to reveal their true service experience when they complete a survey.

It is in your best interest for as many customers as possible to be included in the customer satisfaction program.

Unsolicited feedback can be received from the online customer feedback web form or by directly contacting the franchisor's call center. All types of feedback provide useful information for growing and improving the business.

How to remove someone from job satisfaction surveys

It best that as many customers as possible are included in the customer feedback program. But when a customer requests removal from the program, it is best to remove them.



By default **Business Accounts** and **Contacts** are excluded from customer feedback programs.

To prevent an existing customer from being included in a customer feedback survey

1. Find and open the customer's **Account**.
2. Scroll down to the **Marketing Information** section.

The screenshot shows the account page for Genevieve McMullan. The 'Marketing Information' section is expanded, showing various fields for communication preferences and survey participation. The fields include: Preferred Communication Channel, Last Job Date, Unsubscribe (checkbox), Days Since Last Job Offer, Survey Opt Out (checkbox), Last Survey Sent, SMS Unsubscribe (checkbox with an info icon), and Days Since Last Survey (0).

3. Place the **Account** in **Edit** mode.

This screenshot is identical to the previous one, but with a green arrow pointing to the edit icon (a pencil) located at the end of the 'Unsubscribe' field.

4. Check Survey Opt Out, then press Save.

The screenshot displays the 'Genevieve McMullan' account profile in the Business Management system. The 'Survey Opt Out' checkbox is checked and highlighted with a yellow background and a green arrow labeled '1'. The 'System Information' section shows the account was created by Simon Walker on 19/04/2018 at 10:06 AM and last modified by Simon Walker on 19/04/2018 at 10:16 AM. The account record type is 'Individual' and the currency is 'Australian Dollar'. The 'Save' button is highlighted with a green arrow labeled '2'.

The customer will now be excluded from the customer feedback program.

CHAPTER 15

Working with Reports

Understanding reports	cdlvii
Standard reports	cdlx
Franchise Owner Reports	cdlx
How to export a report	cdlxii
How to print a report	cdlxiv

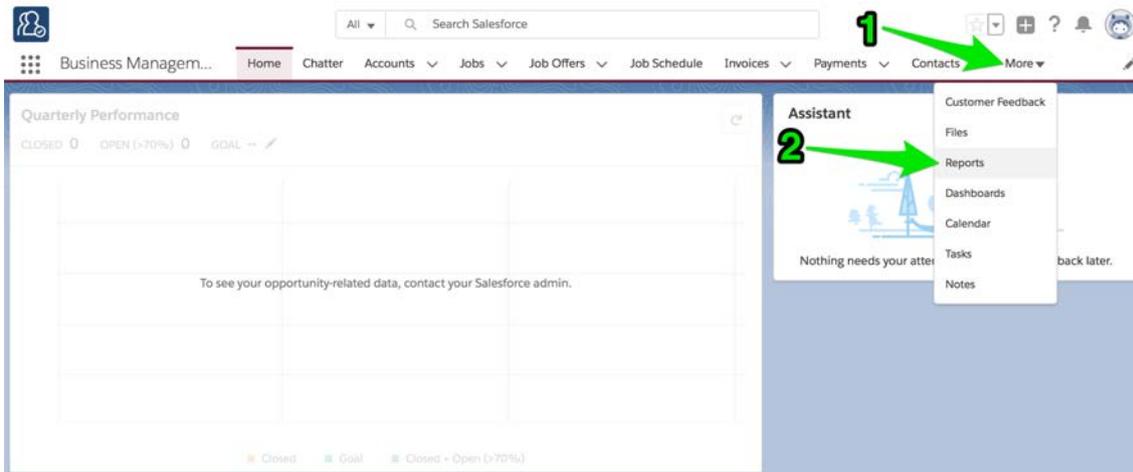
Understanding reports

A report provides a summary of your records filtered by specific criteria at a point in time. Reports provide a great way to remain aware of the overall performance of your business.

Business Management ships with a range of reports tailored to operations.

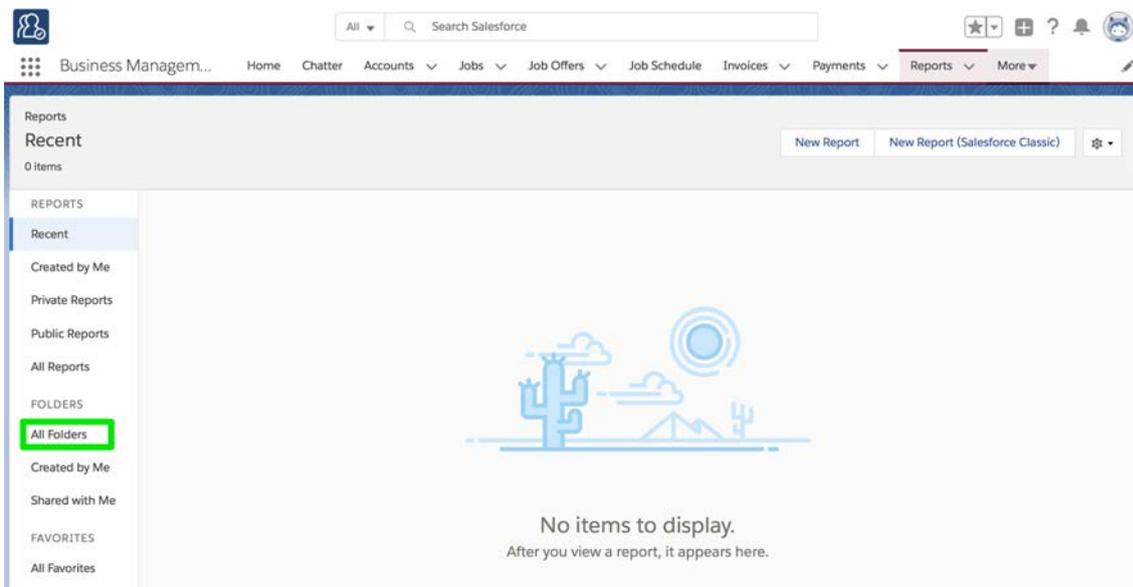
To discover available reports

1. From the Salesforce menu, choose **More**, then choose **Reports**.



The recent reports folder appears. If you have yet to use a report, this will be blank.

2. To see the different types of reports, go to the **All Folders** folder.



There you will see each of the different categories of report that come with Business Management.

3. Select any one of the report folders.

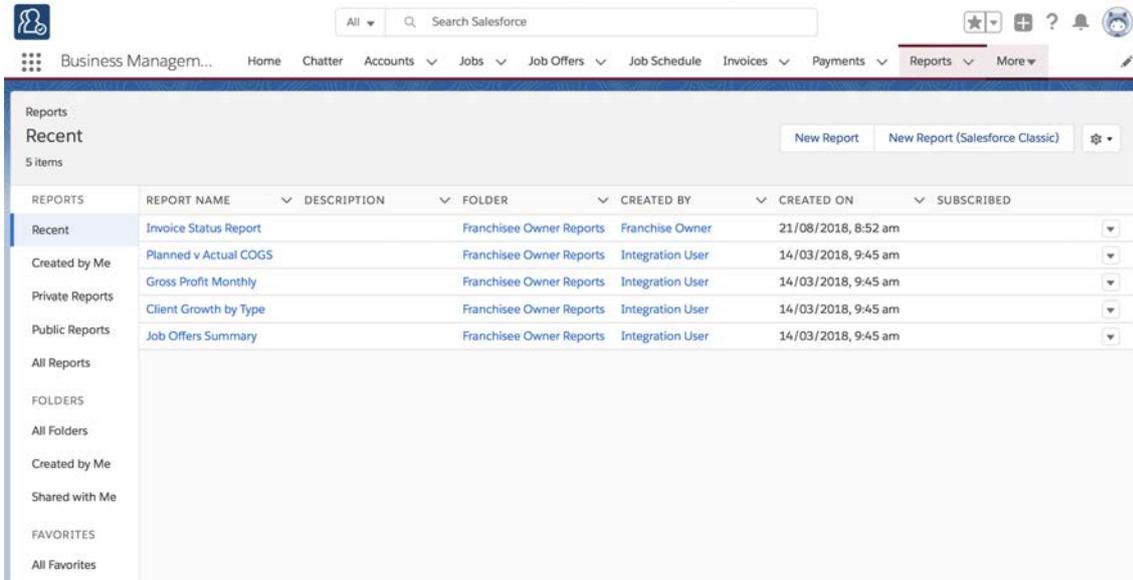
The screenshot shows the Salesforce Reports interface. The left sidebar lists various report categories: RECENT, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders (highlighted), Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area displays a table with columns: NAME, CREATED BY, CREATED ON, LAST MODIFIED BY, and LAST MODIFIED DATE. A single report is listed: 'Franchisee Owner Reports' by 'Integration User' on '14/03/2018, 9:45 am'. A green arrow points to the 'Franchisee Owner Reports' link in the NAME column.

Now you can see the reports within that folder.

The screenshot shows the Salesforce Reports interface with the 'Franchisee Owner Reports' folder selected. The breadcrumb path is 'All Folders > Franchisee Owner Reports'. The table lists 21 reports with columns: NAME, DESCRIPTION, FOLDER, CREATED BY, CREATED ON, and SUBSCRIBED. The reports listed are:

REPORTS	NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Recent	Client Growth by Type		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Created by Me	Actual Hours v Target		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Private Reports	Gross Profit Monthly		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Public Reports	Gross Profit Weekly		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
All Reports	Job Offers Summary		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Job Request Conversion Last 90 Days		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Job Size Invoiced		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Job Size Profit		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Job Size Quoted		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Created by Me	Job Source Summary		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Shared with Me	Job Status ALL OPEN		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Job Source v Profit		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Job Status Last 90 Days		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
FAVORITES	Open Invoices by Age		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Open Invoices by Customer Name		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Planned v Actual COGS		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Planned v Actual Hours		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Quote Conversion - Last 90 days		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Quote Conversion by Job Size <\$2000		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Quote Conversion by Job Size >\$2000		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
All Favorites	Invoice Status Report		Franchisee Owner Reports	Franchise Owner	21/08/2018, 8:52 am	

4. Open up some of the reports and look at them. You will begin to understand the range of reports available to you. After you have browsed around for a while, the Recent reports folder will contain all the reports you have opened and looked at recently.



The screenshot shows the Salesforce Business Management interface. At the top, there is a navigation bar with a search bar and various menu items: Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, Reports, and More. The Reports menu is currently selected. Below the navigation bar, the Reports section is displayed, showing a list of recent reports. The list is organized into folders: Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The Recent folder is expanded, showing a table of reports.

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Recent	Invoice Status Report		Franchisee Owner Reports	Franchise Owner	21/08/2018, 8:52 am	
Created by Me	Planned v Actual COGS		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Private Reports	Gross Profit Monthly		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Private Reports	Client Growth by Type		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Public Reports	Job Offers Summary		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	

Standard reports

While you can always create your own reports, the reports that ship with Business Management are summarized below.

Franchise Owner Reports

Report Name	Description
Actual Hours v Target	Count of job offers by week.
Client Growth by Type	New accounts listed by month.
Gross Profit Monthly	Gross profit by month.
Gross Profit Weekly	Gross profit by week.
Invoice Status Report	Enable periodic reconciliation with external financial system.
Job Offers Summary	Count of jobs in each status by created date.
Job Request Conversion Last 90 Days	Converted leads vs job count in the last ninety days.
Job Size Invoiced	Count and sum of actual hours aggregated by job value.
Job Size Profit	Profit aggregated by job size.
Job Size Quoted	Count and sum of quoted hours aggregated by job value.
Job Source Summary	Count of jobs by month.
Job Source v Profit	Profit grouped by job source.
Job Status ALL OPEN	Count of jobs by status.
Job Status Last 90 Days	Jobs by status in the last ninety days.
Open Invoices by Age	Invoice numbers by account by age.

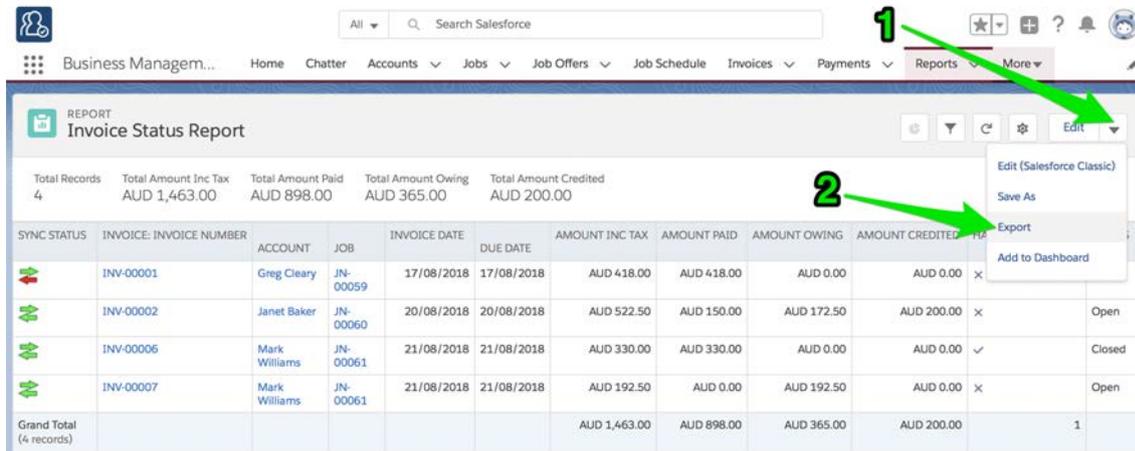
Report Name	Description
Open Invoices by Customer Name	Invoice numbers by account name.
Planned v Actual COGS	Estimated cost of goods sold (COGS) value vs actual COGS value.
Planned v Actual Hours	Estimated hours vs actual hours by month.
Quote Conversion - Last 90 Days	Job count and dollar value as a percentage of quotes issued in the last 90 days.
Quote Conversion by Job Size < \$2,000	Job count and dollar value as a percentage of quotes issued where job size is less than \$2,000.
Quote Conversion by Job Size > \$2,000	Job count and dollar value as a percentage of quotes issued where job size is greater than \$2,000.

How to export a report

You can export the results of a report to Excel or a comma delimited format.

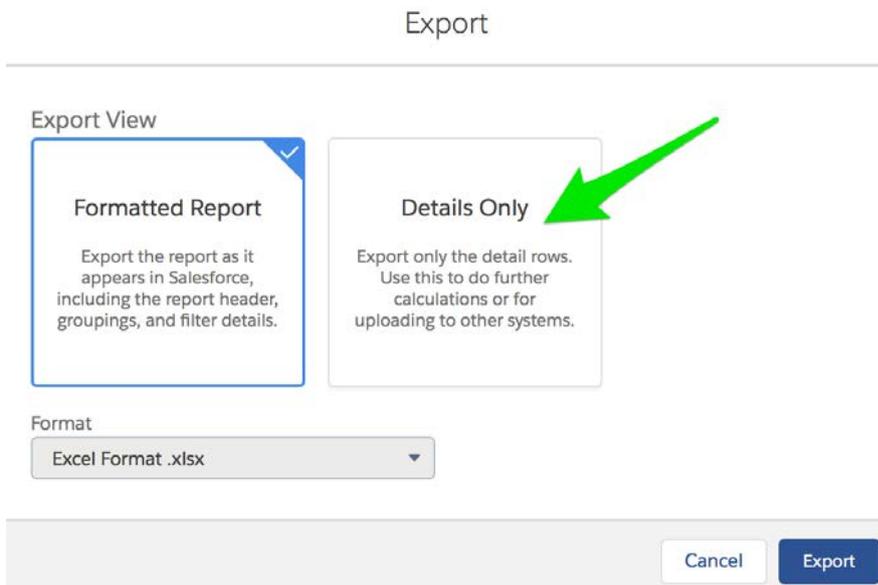
To export report results

1. From any report, press the **Show more** button then choose **Export**.



The Export dialog box appears.

2. Choose between a **Formatted Report** and a **Details Only** report.



A **Formatted Report** will appear similar to what you see on-screen and is useful for printing or pasting into emails and reports. A **Details Only** report is preferable for performing further calculations.

3. If you choose Details Only, choose the format you need (*Excel format .xls* or *Comma Delimited .csv*) then press **Export**.

Export

Export View

Formatted Report

Export the report as it appears in Salesforce, including the report header, groupings, and filter details.

Details Only

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format Encoding

Excel Format .xls

ISO-8859-1 (General US & Western Europe)

Cancel Export



You will find the exported data in your browser's Downloads folder.

How to print a report

To print a report

1. Export the report. See “How to export a report” on page cdlxii.
2. Print it using Excel.

CHAPTER 16

Accessing Help and Support

Further Product Documentation	cdlxvii
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Contacting Customer Support	cdlxviii
Raising Service Requests	cdlxviii
Granting Account Login Access	cdlxxvi

Further Product Documentation

Congratulations for starting along the pathway to accelerate your operations using Franchise Cloud Solutions products. We know you're likely to have questions and need support along the way.

The first port of call should always be [our comprehensive video tutorials and user guides](#).

Knowledge Base

Franchise Cloud Solutions maintains a Knowledge Base covering

- » Release Notes
- » Tips & Tricks
- » Configuration instructions
- » Error messages

Customers can [access the Knowledge Base](#) at any time.

Contacting Customer Support

Customers can access our customer support team between the hours of 8:30 am and 5:30 pm Monday through Friday. Your project manager will add key personnel to our Service Desk to allow them to raise issues and request assistance.



Customers can also reach our support team by sending email to

» service@franchisecloudsolutions.com

Raising Service Requests

When you log into the Service Desk, you're shown a list of the types of service requests you can raise with us. We ask you to choose the most appropriate request type so that we can help you most effectively.

Service Desk / Franchise Cloud Solutions

Franchise Cloud Solutions

Welcome to Franchise Cloud Solution's Service Desk. Raise any request with us by choosing an option below.

What can we help you with?



How do I...

Help using our products.



Technical support

Help installing, configuring, or troubleshooting.



Report a bug

Tell us the problems you're experiencing.



Suggest improvement

See a place where we can do better? We're all ears.



Suggest a new feature

Let us know your idea for a new feature.



Licensing and billing questions

Choose this if you have questions about licensing or billing.



Other questions

Don't see what you're looking for? Select this option and we'll help you out.

From this menu, select the type of request you're wanting to raise. Each type of service request is explained below.

Request Type	Comments
How do I...	We provide comprehensive videos and user guides for all our products. These materials cover all standard and basic procedures. However, there will still be a range of things it doesn't cover, such as site-specific customizations and advanced uses. For these types of requests, we encourage you to ask our support specialists how to do something.

Request Type	Comments
Technical support...	If you are the site administrator and need help configuring the product, we encourage you to reach out to us for assistance with technical support.
Report a bug...	If you see behavior that you believe contradicts the documentation or performs in a manner against your expectations, feel free to report a bug.
Suggest an improvement...	When there is an existing piece of functionality that you believe could be improved, feel free to suggest it here.
Suggest a new feature...	When you would like to the system be extended to cover a new area of functionality, we're keen to receive your input. (We can't always promise that we implement every feature request promptly but we do regularly review customer feature requests and prioritize them based on business need.)
Licensing and billing questions	For questions related to licensing and billing, please complete this type as our licensing specialists can deal with it.
Other questions	For any questions not falling into one of the above-listed categories, feel free to use this request type.

How to Suggest Improvements or Features

We're always keen to better understand how you work and what your needs are. When you request a new feature, we're always keen to understand how you do business today.

We would like to know:

1. Your current business process. What do you do? What are your business rules?
2. How your team members achieve the task today.
3. How you reckon the task could best be achieved in our software.



Most people only tell us #3.

We're always more able to help you if you give us all three pieces of information.

How to Report a Bug

Franchise Cloud Solutions implementations come with a suite of test cases to assist you with UAT. Each UAT case provides a set of steps that you should be able to follow to completion.



If a test fails, then congratulations!, you have just found a bug!

There may be several different reasons for bugs. It might be:

- » a browser bug
- » a problem with our code
- » an issue with test data or templates
- » a documentation bug
- » an issue with the test suite
- » or, perhaps, something else entirely.

Whatever the case may be, reporting it well and in a timely fashion will help us resolve the issue as soon as possible.

What is a useful bug report?

When you do find bugs that need fixing, we're keen to get them resolved as soon as possible. What really helps with this is getting all the information we need to identify the issue.



Some of this depends on getting high quality information from you.

Here's how you can help us help you!

Within our Help Desk, you can see all the service requests that your organization has filed. We'd appreciate it if you'd check that your bug hasn't already been raised.

When you log a bug, please remember to describe only a single bug in a service request.

Feel free to raise as many issues as you need!

Here are some tips on writing a good bug report.

How to write a good bug report

Write a **Summary** that outlines the bug as best you can describe it.

Within the **Detail** section, we need the following information

1. What happened? What concrete things did you observe?
2. Steps to replicate? List each page, field, data value and button pressed to replicate.
3. What you expected the system to do (if there was no error).
4. The error that you observed.
5. Your browser and operating system.
6. Include a screen shot of the issue. Make sure the screen shot includes the entire window.

Optionally, we would invite you to also characterize the Business Impact according to this scale.

1. Who is affected (franchisees/who in head office)? What proportion of franchisees?
2. Visibility? Estimate of how many times per month (per franchisee/affected party) this issue will be encountered.
3. Blocks? Does this block a process? What process is blocked?

Example Bug Report (minimal)

Summary

Franchisee does not have permission to create a new job from a customer's Accounts page.

Description

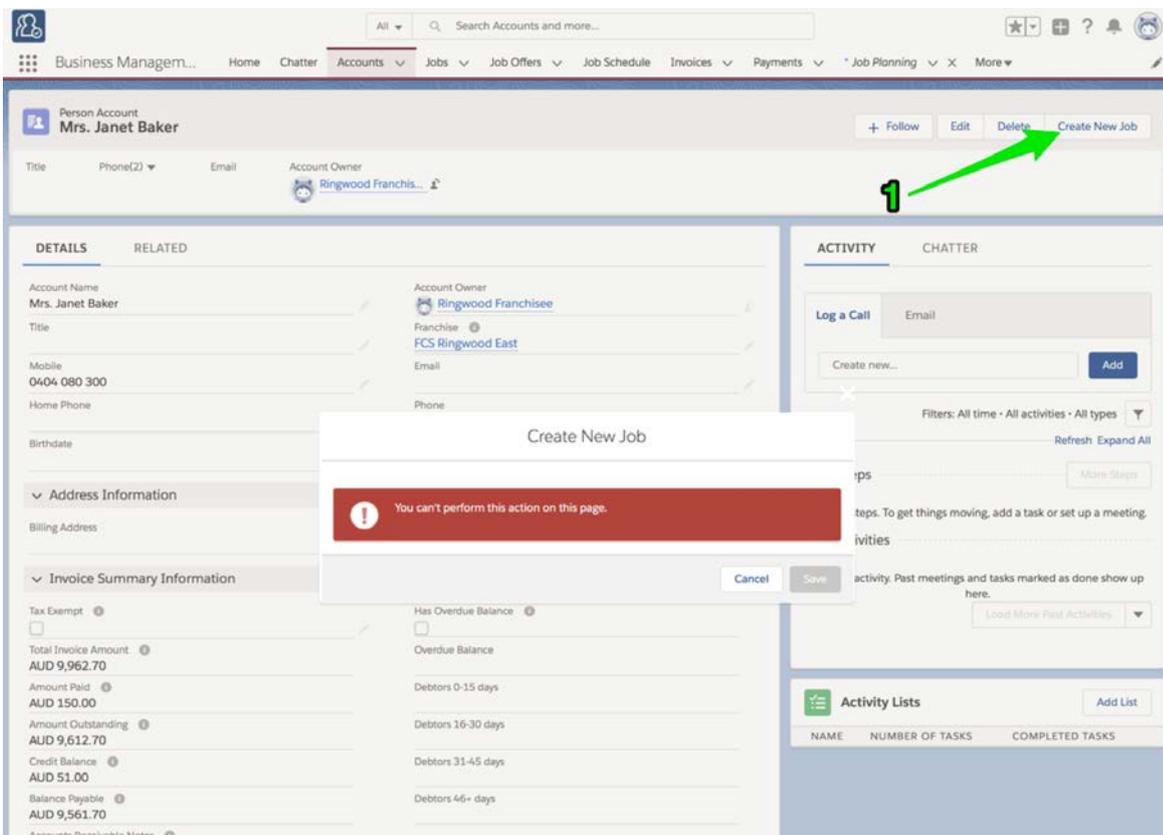
Cannot create new job from a customer's Account page.

To replicate:

1. Log into Business Management as a franchisee.
2. Go to the Accounts tab and select an account.
3. Click the Create New Job button.

EXPECT: A new job to be created.

ACTUAL: Error dialog "Create New Job" displays with the message "You can't perform this action on this page."



Environment

Sandbox.

Google Chrome.

Desktop (Windows 10).

Example Bug Report (technical details)

Summary

Accounts with Financial Integration throw component error on page load

Description

In a Franchise Account already connected to Xero (e.g. HAH Prod: Ringwood East), clicking onto the Account Details screen causes the Account Code Mapping Setup dialog to appear. When it appears, it throws A Component Error exception.

Component error throws in both Chrome and Safari.

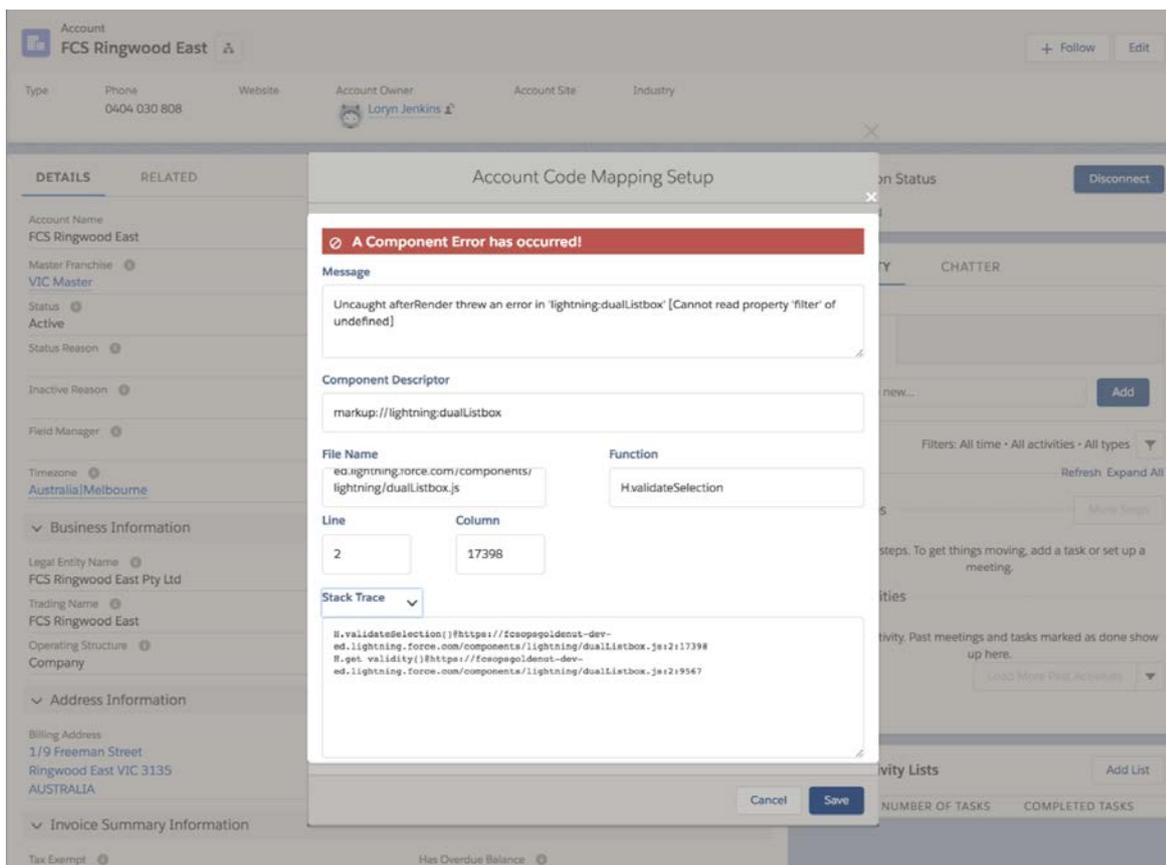
I'm logged into Golden UAT as system administrator.

To replicate

1. Go to the Accounts screen.
2. Choose the **FCS Ringwood East** account.

EXPECT: FCS Ringwood East account displays.

ACTUAL: FCS Ringwood East account displays, loads Account Code Mapping Setup dialog, and immediately throws Component Error.



Error details

Uncaught afterRender threw an error in 'lightning:dualListbox' [Cannot read property 'filter' of undefined]

Message

markup://lightning:dualListbox

Component Descriptor

<https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js>

Function

H.validateSelection

Stack Trace

H.validateSelection()@<https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js>:2:17398

H.get validity()@<https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js>:2:9567

Environment

Production

Google Chrome OR Safari (BUT NOT Firefox).

MacOS 10.13.

Example Bug Report (medium complexity replication)

Headline

Events on job calendar are clickable only once per instantiation.

Description

You can only cause the Event dialog to appear on an event in the calendar ONCE per instance. After you've used up your one click, you have to reload the calendar in order to cause the Event dialog to re-appear.

To replicate:

1. Open calendar.
2. Click on an event. The **Event** dialog box appears.
3. Click the **Cancel** button.
4. Click again on the same event.

EXPECT: Event dialog to re-appear.

ACTUAL: Event object is not clickable (does not show clickable mouse pointer; clicking on it elicits no response).

Further:

5. Click on another event. The **Event** dialog box appears. (So, it's only the event that was clicked that has become unclickable; not all events on calendar.)
6. Click **Cancel**.
7. Click again on the same event.

EXPECT 1: Event dialog to re-appear.

EXPECT 2: Event object unclickable.

ACTUAL: Event object is not clickable.

Environment

Safari & Chrome

Mac OS 10.12

Business Impact

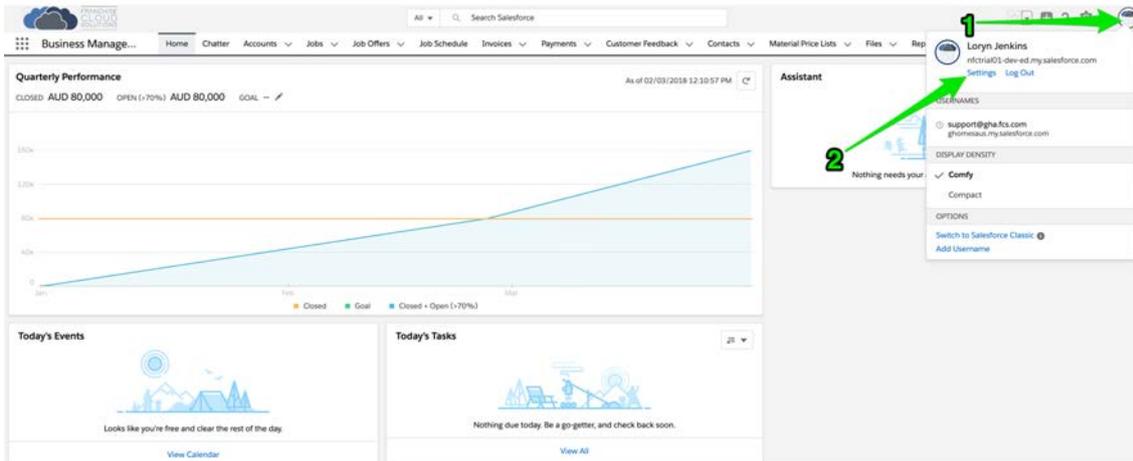
- » Who affected: All franchisees, Users of Job Calendar.
- » Visibility: 40 times per month per franchisee.
- » Block: None.

Granting Account Login Access

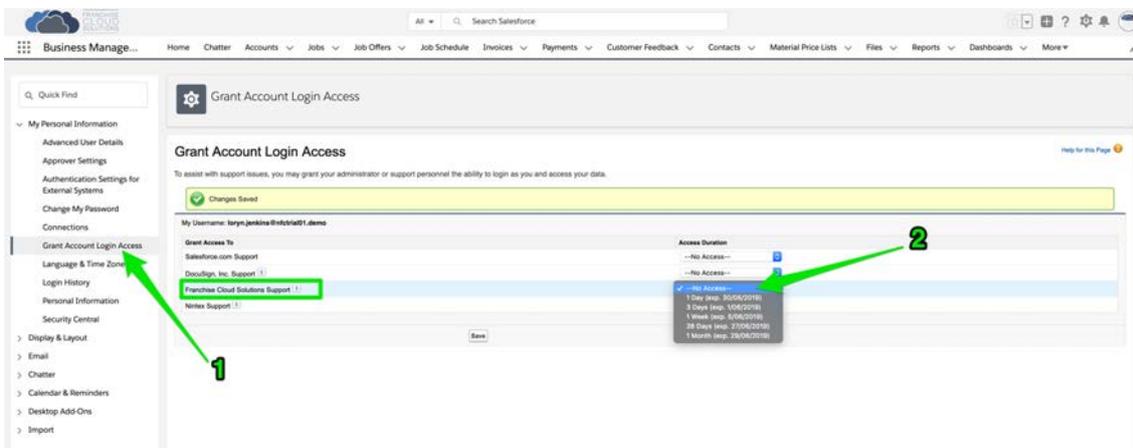
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

To provide our customer support team access to your system

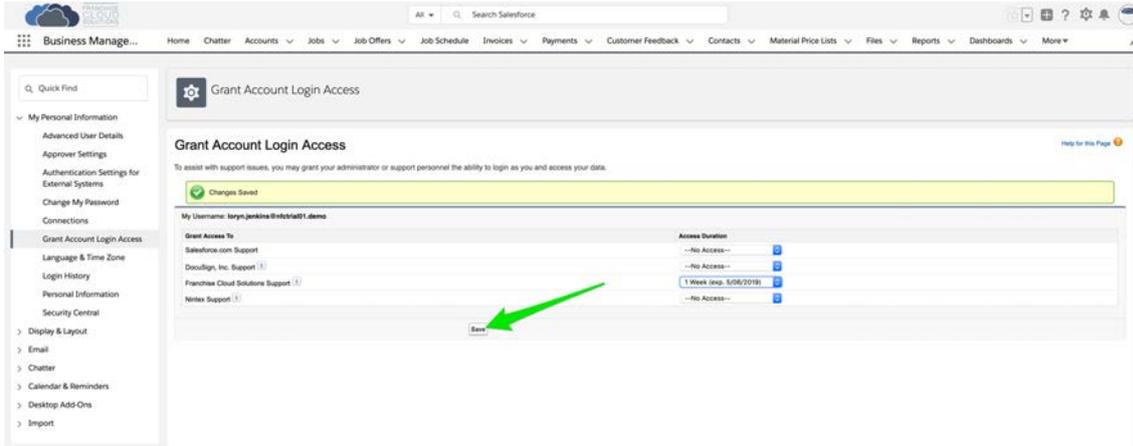
1. Select your account **Settings**.



2. Select the **Grant Account Login Access** page. Then select an appropriate **Access Duration** from the **Franchise Cloud Solutions Support** user.



3. Press **Save**. Our support team will be able to access the system during the period of time you have granted.



You can revoke access at any time.