



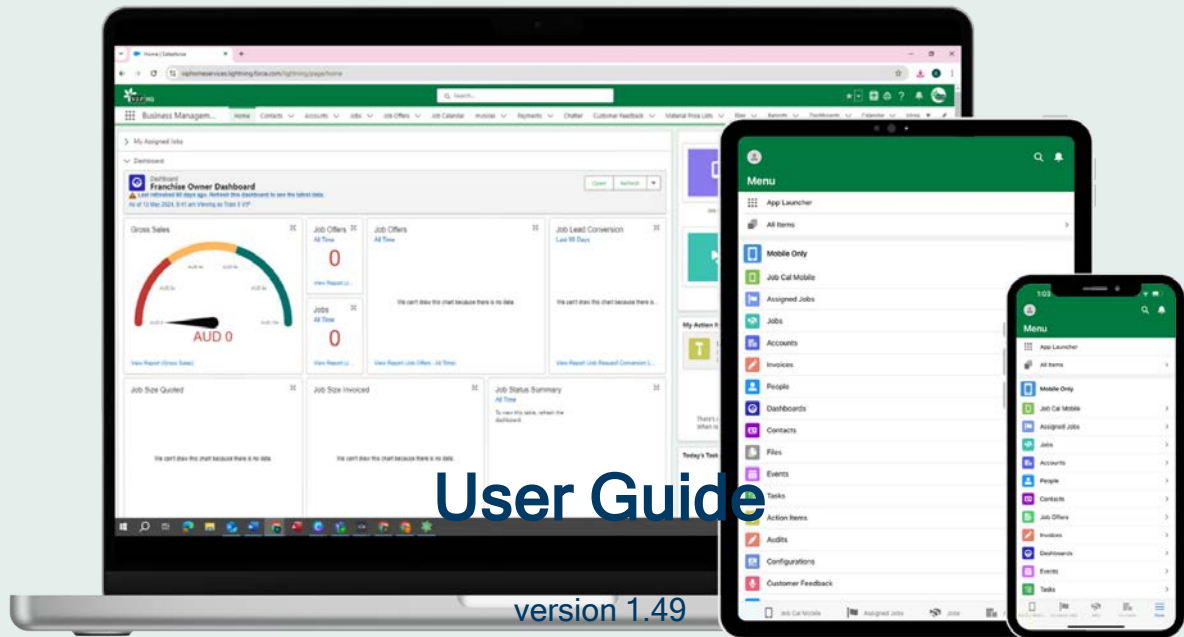
# User Guide

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 paper-work 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.



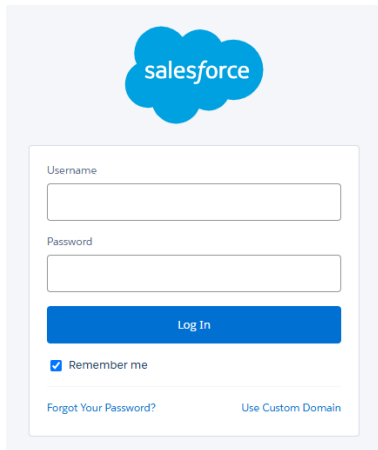
Collaborate with your franchisor to receive better support and achieve your business goals.

# 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](https://login.salesforce.com).



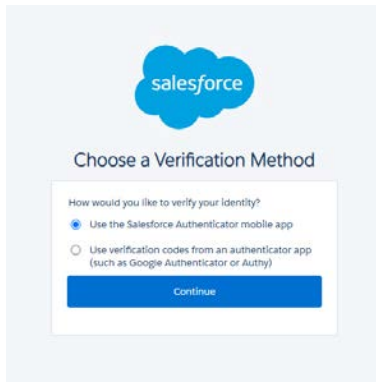
2. Download the Salesforce Authenticator app on your mobile.



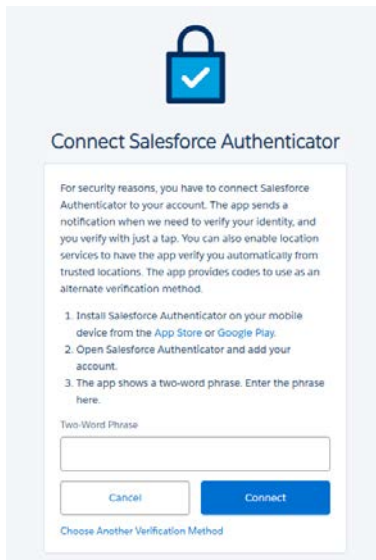
3. On your desktop, enter your **Username** and **Password**. Check the **Remember me** checkbox then tap **Log In**.



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

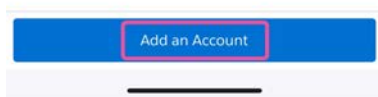


5. The 'Connect Salesforce Authenticator' screen will appear.

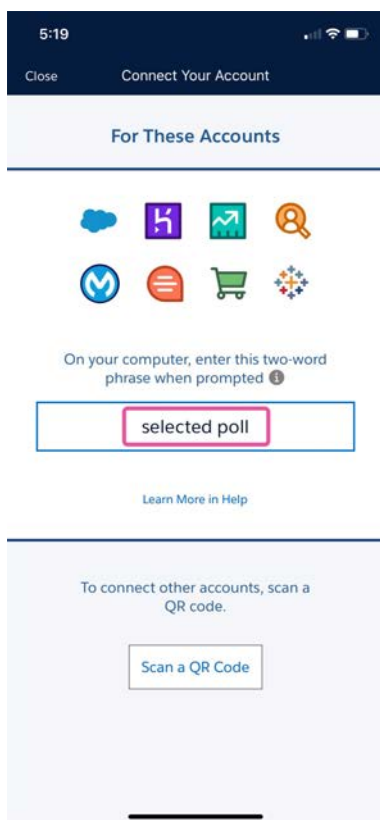


6. Open the Salesforce Authenticator app on your mobile.

## 7. Tap Add an Account.

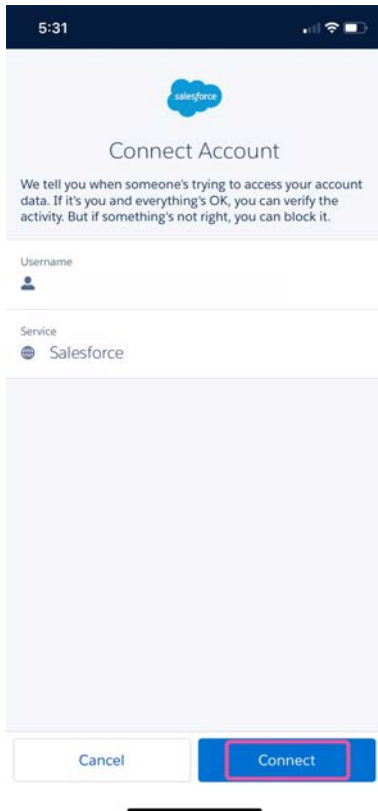


8. A two-word phrase will be displayed.



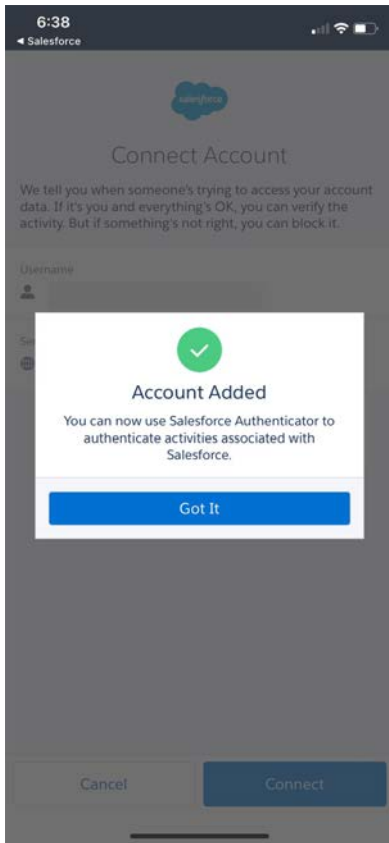
9. Enter the two-word phrase as it appears into the field box on your desktop, and press **Connect**.

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.



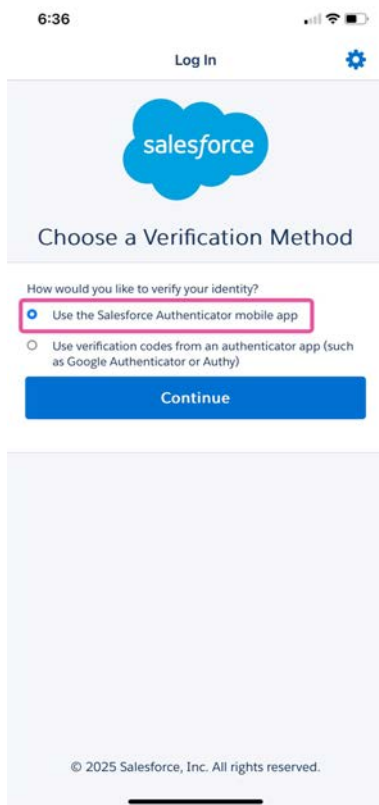
2. Download the Salesforce Authenticator app.



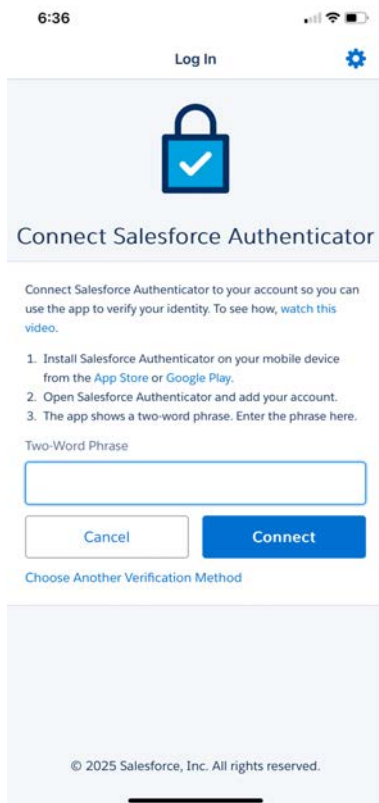
3. Open the Salesforce app.
4. Enter your Username and Password. Check the **Remember me** checkbox then tap **Log In**.

The image shows the login screen of the Salesforce mobile app. At the top, the status bar shows the time 5:32 and signal icons. The app header has "Log In" and a settings gear icon. Below the header is the Salesforce logo. The login form includes a "Username" label and input field, a "Password" label and input field, a blue "Log In" button, a checked "Remember me" checkbox, and a "Forgot Your Password?" link. At the bottom, there is a copyright notice: "© 2025 Salesforce, Inc. All rights reserved."


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



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



6:36 Log In



### Connect Salesforce Authenticator

Connect Salesforce Authenticator to your account so you can use the app to verify your identity. To see how, [watch this video](#).

1. Install Salesforce Authenticator on your mobile device from the [App Store](#) or [Google Play](#).
2. Open Salesforce Authenticator and add your account.
3. The app shows a two-word phrase. Enter the phrase here.

Two-Word Phrase

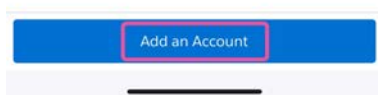
[Choose Another Verification Method](#)

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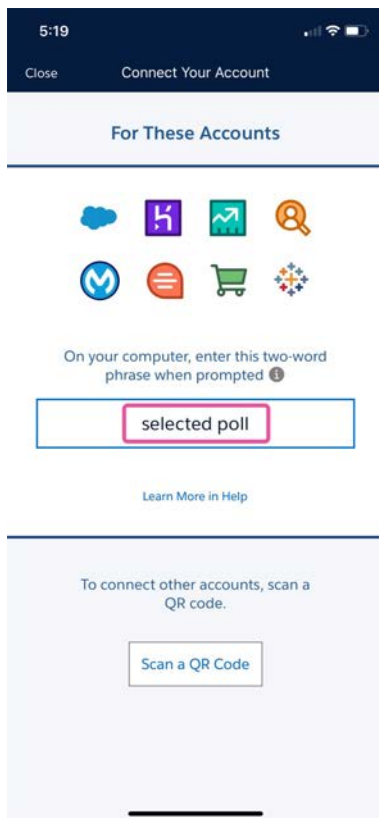
7. Open the Salesforce Authenticator app.



## 8. Tap Add an Account.



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

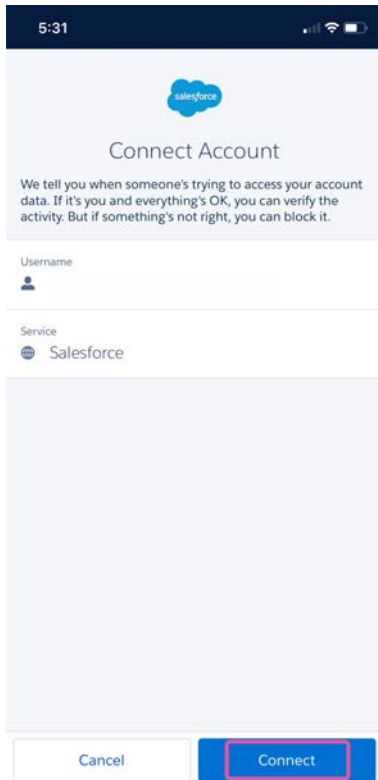


10. Switch to the Salesforce app, paste the two-word phrase into the field box, and press **Connect**.

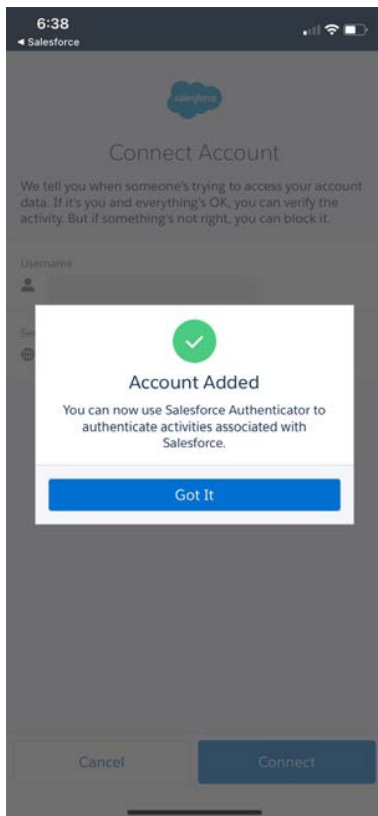
11. You will receive a notification for a connection request from the Salesforce Authenticator app. Tap the notification and you will be taken to the Authenticator app.



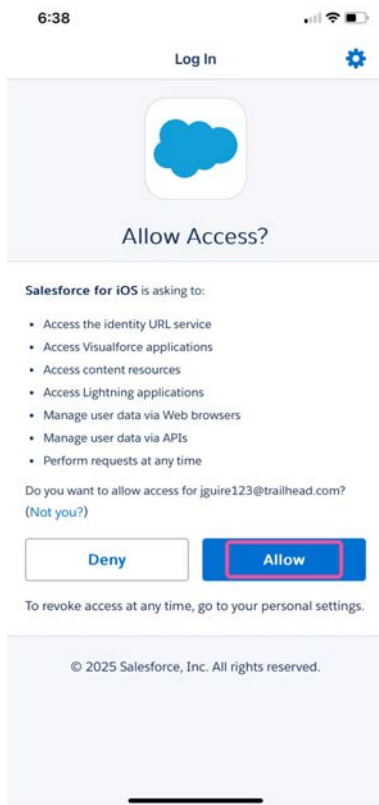
12. The Authenticator app will display the 'Connect Account' page. If the Username and Service is correct, tap **Connect**.



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

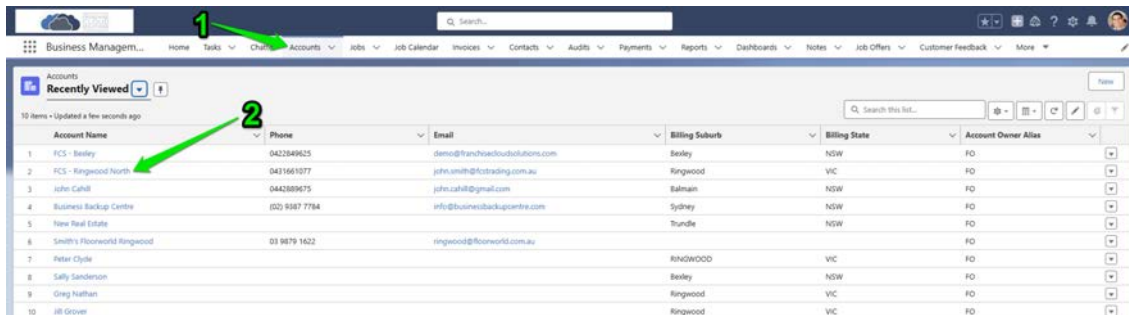


If you have newly purchased your franchise, all this information should be correct and up-to-date when you first begin using Business Management. But it’s important to know where it is and how to change this information so that you can always keep it up-to-date.

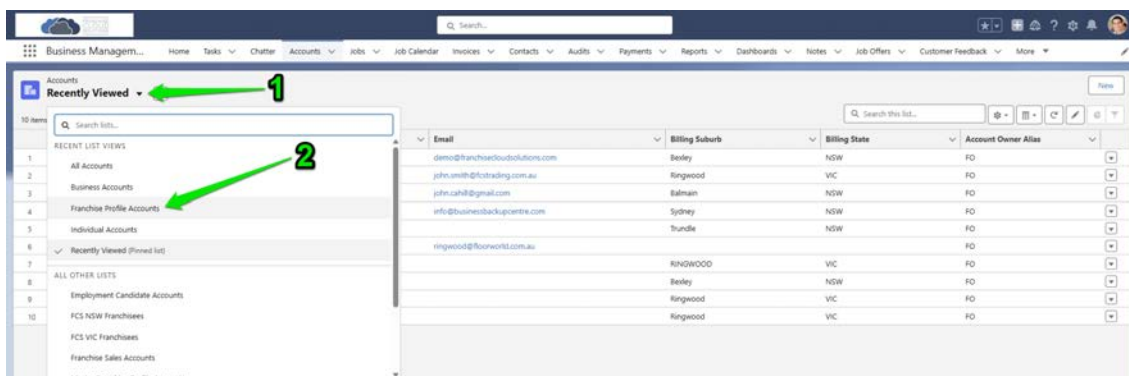
# How to locate your Franchise Profile Account

To locate your Franchise Profile Account

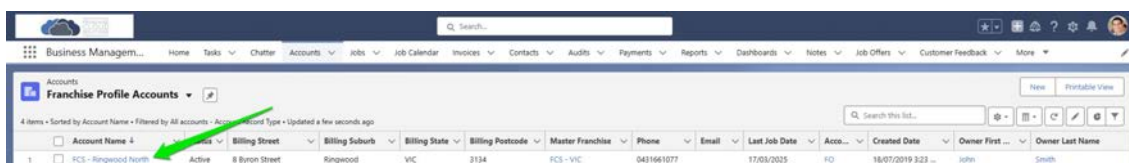
1. Within **Accounts**, check for your business name.



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.

**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

**Territories (1)**  
1 item • Updated a few seconds ago

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

[View All](#)

**Business Hours (2)**  
2 items • Updated a few seconds ago

<input type="checkbox"/>	Business Hours Number	Day	Start Time	End Time	Type
1	<input type="checkbox"/> BH-000154	Tuesday	07:00 AM	09:00 PM	
2	<input type="checkbox"/> 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)

1 item • Updated 2 minutes ago

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

View All

Business Hours (2)

2 items • Updated 2 minutes 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	

View All

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

Cancel Next

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 FCS - Ringwood North

\* Day Monday

\* Start Time 07:00 AM

\* End Time 09:00 PM


System Information

Currency AUD - Australian Dollar

Record Type Contact Hours

Cancel Save & New Save

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

 <b>Business Hours (3)</b>			
3 items • Sorted by Day • Updated a few seconds ago			
	<input type="checkbox"/> <b>Business Hours Number</b>	<b>Day</b> ↑	<b>Start Time</b>
1	<input type="checkbox"/> <a href="#">BH-000160</a>	Monday	07:00 AM
2	<input type="checkbox"/> <a href="#">BH-000154</a>	Tuesday	07:00 AM
3	<input type="checkbox"/> <a href="#">BH-000156</a>	Thursday	12:00 AM
			<a href="#">View All</a>

# 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 'FCS - Ringwood North' account. The 'Job Allocation Information' section contains the 'Unavailable' checkbox, which is checked and highlighted with a green box. A green arrow points to the 'Operating Settings' tab. The 'Location Settings' section is also visible below.

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

No Timeout

Notification Preference

2-Way SMS & Email

Notification Contact

John Smith

Notification SMS

0431661077

Notification Email

Off System

Unavailable

Unavailable From

7/04/2025

Unavailable To

20/04/2025

Territory Only

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


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.

xxxix

Business Management User Guide

# 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.

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

☒

Unavailable

☐

No Timeout

☐

Unavailable From

Notification Preference

2-Way SMS & Email

Unavailable To

Notification Contact

John Smith

Territory Only

☒

Notification SMS

0431661077

Territory Only Start Date

Notification Email

Territory Only End Date

Off System

☐

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

# 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.

Account  
FCS - Ringwood North

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

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

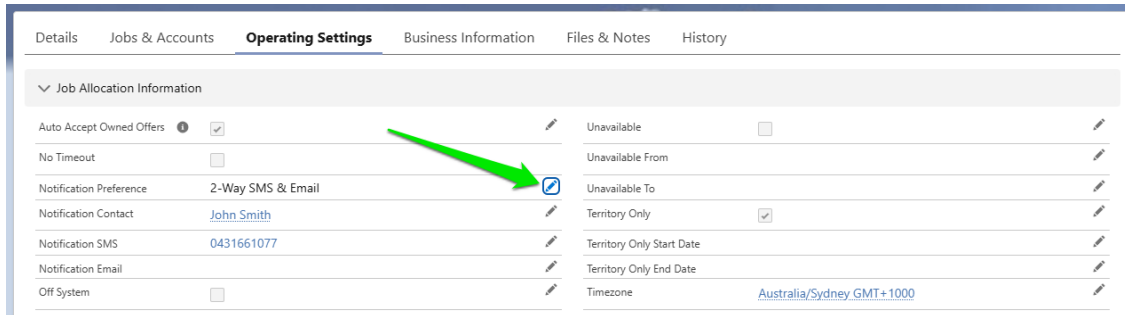
Job Allocation Information

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	<a href="#">John Smith</a>	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

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

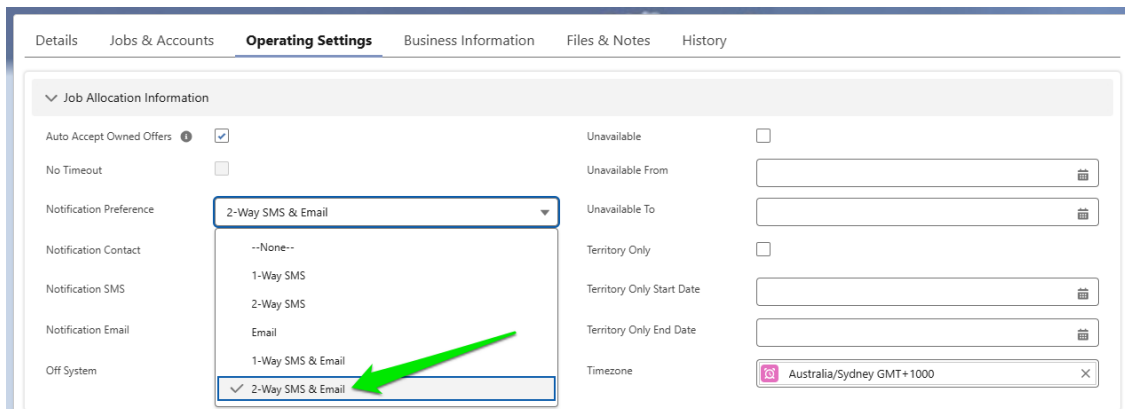
3. Select the appropriate option from Notification Preference.

Press **Edit**.



The screenshot shows the 'Operating Settings' page with the 'Job Allocation Information' section expanded. The 'Notification Preference' dropdown menu is open, showing options: '--None--', '1-Way SMS', '2-Way SMS', 'Email', '1-Way SMS & Email', and '2-Way SMS & Email' (which is selected and highlighted with a green arrow). Other fields like 'Notification Contact' (John Smith), 'Notification SMS' (0431661077), and 'Off System' are visible.

Select your desired communication preference.



This screenshot is identical to the previous one, showing the 'Notification Preference' dropdown menu open with '2-Way SMS & Email' selected. A green arrow points to the selected option.

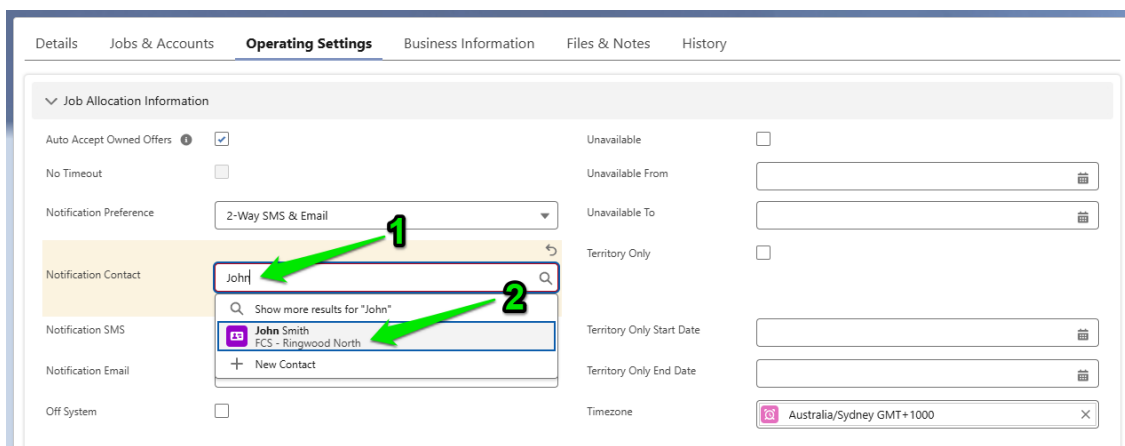


If SMS options are not available you may not be licensed for SMS Management.

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. A green arrow labeled '1' points to the dropdown arrow, and another green arrow labeled '2' points to the selected contact 'John Smith'. The dropdown menu shows 'John Smith' with a phone icon and 'FCS - Ringwood North'. Other options include 'New Contact'.



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

Contact

John Smith

Title

Account Name

Phone (2)

Email

Contact Owner

FCS - Ringwood North

john.smith@fcstrading.com.au

John Sm...

Details

Employment

Credentials

Personal

Marketing

Files & Notes

▼ Contact Information

Name

John Smith

Title

Account Name

FCS - Ringwood North

Reports To

Status

Active

Birthdate

▼ Contact Details

Mobile

0431661077

Phone

Email

john.smith@fcstrading.com.au

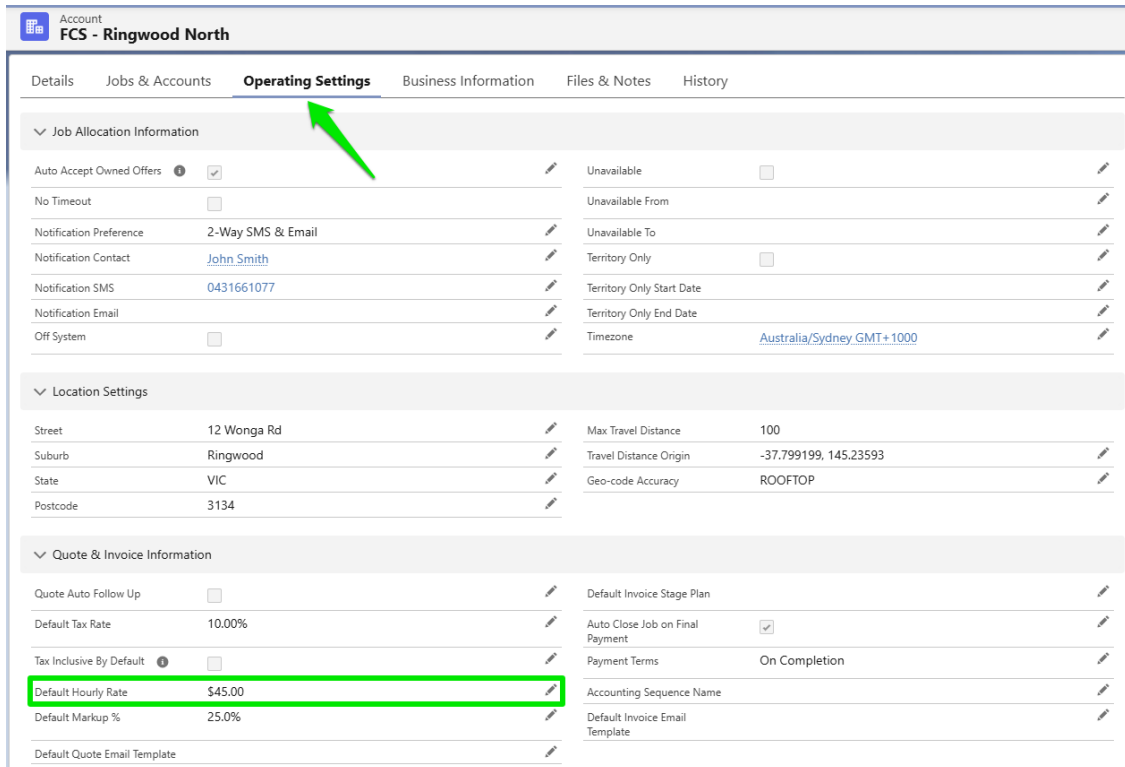
Home Phone

# 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 ☒ Unavailable ☐

No Timeout ☐ Unavailable From

Notification Preference 2-Way SMS & Email Unavailable To

Notification Contact John Smith Territory Only ☐

Notification SMS 0431661077 Territory Only Start Date

Notification Email Territory Only End Date

Off System ☐ 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

▼ Quote & Invoice Information

Quote Auto Follow Up ☐ Default Invoice Stage Plan

Default Tax Rate 10.00% Auto Close Job on Final Payment ☒

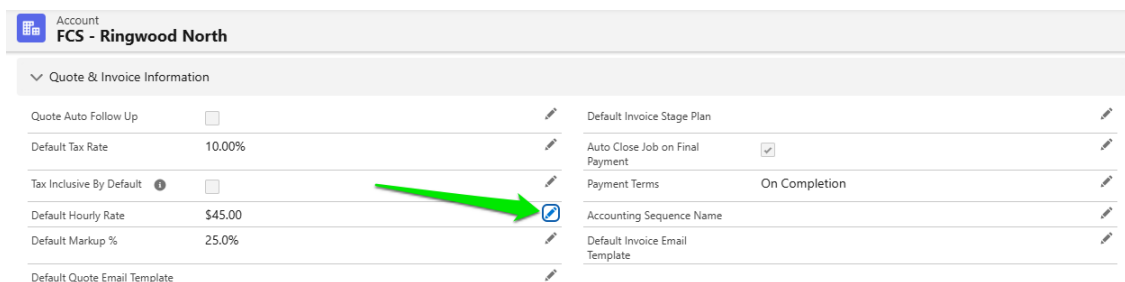
Tax Inclusive By Default ☐ Payment Terms On Completion

**Default Hourly Rate \$45.00** Accounting Sequence Name

Default Markup % 25.0% Default Invoice Email Template

Default Quote Email Template

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



Account  
FCS - Ringwood North

▼ Quote & Invoice Information

Quote Auto Follow Up ☐ Default Invoice Stage Plan

Default Tax Rate 10.00% Auto Close Job on Final Payment ☒

Tax Inclusive By Default ☐ Payment Terms On Completion

Default Hourly Rate \$45.00 Accounting Sequence Name

Default Markup % 25.0% Default Invoice Email Template

Default Quote Email Template

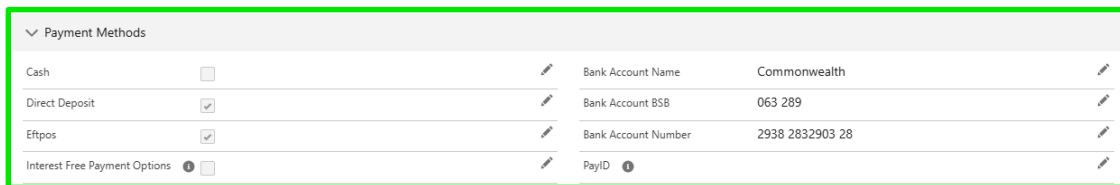
Fields that affect Quotes or Invoices are described below.

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.

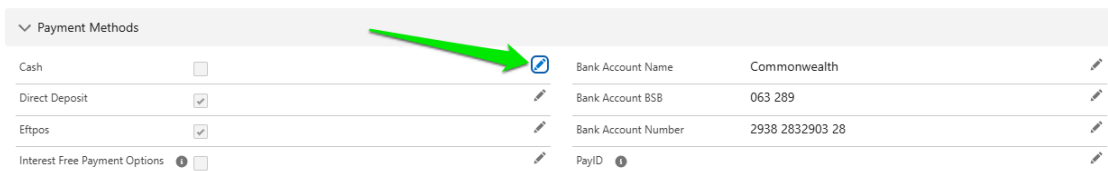
## To change the payment methods on invoices

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



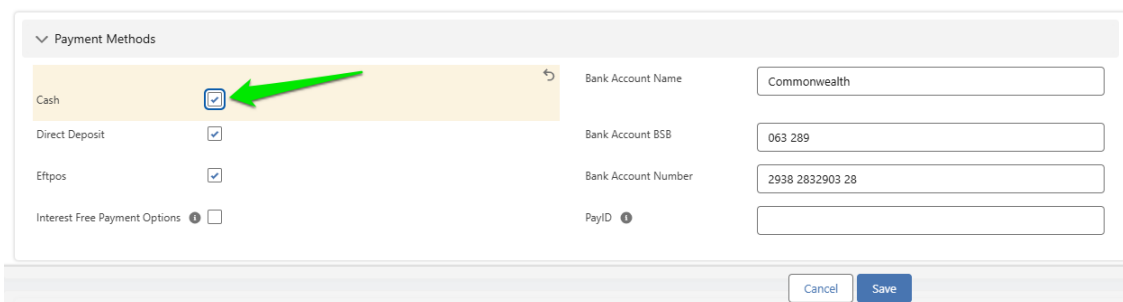
Payment Methods			
Cash	<input type="checkbox"/>	Bank Account Name	Commonwealth
Direct Deposit	<input checked="" type="checkbox"/>	Bank Account BSB	063 289
Eftpos	<input checked="" type="checkbox"/>	Bank Account Number	2938 2832903 28
Interest Free Payment Options	<input type="checkbox"/>	PayID	

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



Payment Methods			
Cash	<input type="checkbox"/>	Bank Account Name	Commonwealth
Direct Deposit	<input checked="" type="checkbox"/>	Bank Account BSB	063 289
Eftpos	<input checked="" type="checkbox"/>	Bank Account Number	2938 2832903 28
Interest Free Payment Options	<input type="checkbox"/>	PayID	

3. Check or uncheck any of the payment methods.



Payment Methods			
Cash	<input type="checkbox"/>	Bank Account Name	Commonwealth
Direct Deposit	<input checked="" type="checkbox"/>	Bank Account BSB	063 289
Eftpos	<input checked="" type="checkbox"/>	Bank Account Number	2938 2832903 28
Interest Free Payment Options	<input type="checkbox"/>	PayID	

Cancel Save

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

The screenshot shows a 'Payment Methods' form with two columns. The left column lists payment methods with checkboxes: 'Cash' (checked), 'Direct Deposit' (checked), 'Eftpos' (checked), and 'Interest Free Payment Options' (unchecked). The right column contains bank account details: 'Bank Account Name' (Commonwealth), 'Bank Account BSB' (063 289), 'Bank Account Number' (2938 2832903 28), and 'PayID' (empty). A green box highlights the 'Bank Account BSB' field, and a green arrow points to the 'Save' button at the bottom right.

Payment Methods	
Cash	<input checked="" type="checkbox"/>
Direct Deposit	<input checked="" type="checkbox"/>
Eftpos	<input checked="" type="checkbox"/>
Interest Free Payment Options	<input type="checkbox"/>

Bank Account Name	Commonwealth
Bank Account BSB	063 289
Bank Account Number	2938 2832903 28
PayID	

Cancel Save

# 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 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.

**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
1 <a href="#">Territory - Ringwood</a>	Owned	John Smith	<input checked="" type="checkbox"/>	Master Territory - VIC

**Business Hours (2)**

Business Hours Number	Day	Start Time	End Time	Type
1 <a href="#">BH-000154</a>	Tuesday	07:00 AM	09:00 PM	
2 <a href="#">BH-000156</a>	Thursday	12:00 AM	11:00 PM	

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

The screenshot displays the 'FCS - Ringwood North' account interface. It features several sections, each with a table of data and a 'New' button. The 'Assets Register (0)' section is highlighted with a green box, and a green arrow points to its 'New' button.

**Territories (1)**

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

[View All](#)

**Business Hours (3)**

<input type="checkbox"/>	Business Hours Number	Day	Start Time	End Time	Type
1	<a href="#">BH-000160</a>	Monday	07:00 AM	09:00 PM	
2	<a href="#">BH-000154</a>	Tuesday	07:00 AM	09:00 PM	
3	<a href="#">BH-000156</a>	Thursday	12:00 AM	11:00 PM	

[View All](#)

**Material Price Lists (1)**

<input type="checkbox"/>	Material Price List Name	Supplier	Owner Alias	Created Date
1	<a href="#">Disposal List</a>	Casey Council	FO	22/03/2022 4:21 PM

[View All](#)

**Assets Register (0)**

[New](#)

[System Information](#)

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

3. 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

4. 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	14/01/2025	Andrew's Mobile Phone	54-677892-317464-0	\$989	iPhone 15	13/01/2026
<a href="#">View All</a>						



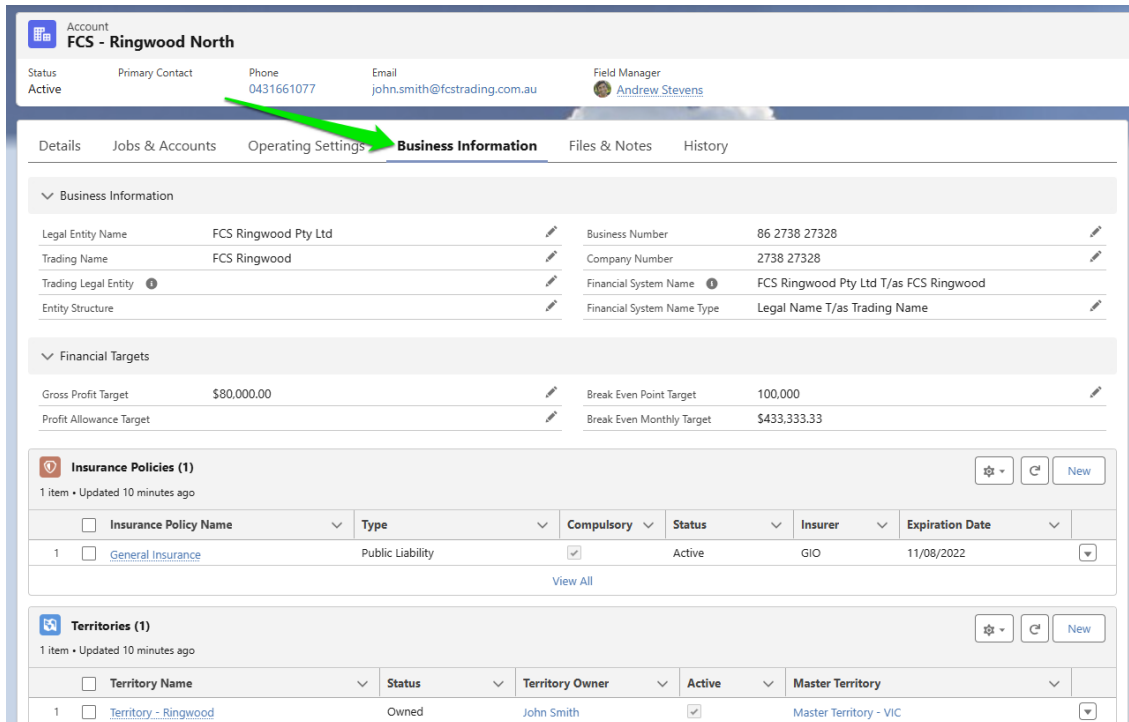
If you insert a reminder date for an asset, you will receive an email on the reminder date notifying you to take action.

# 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: John Smith | 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)**

1 item • Updated 10 minutes ago

<input type="checkbox"/>	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

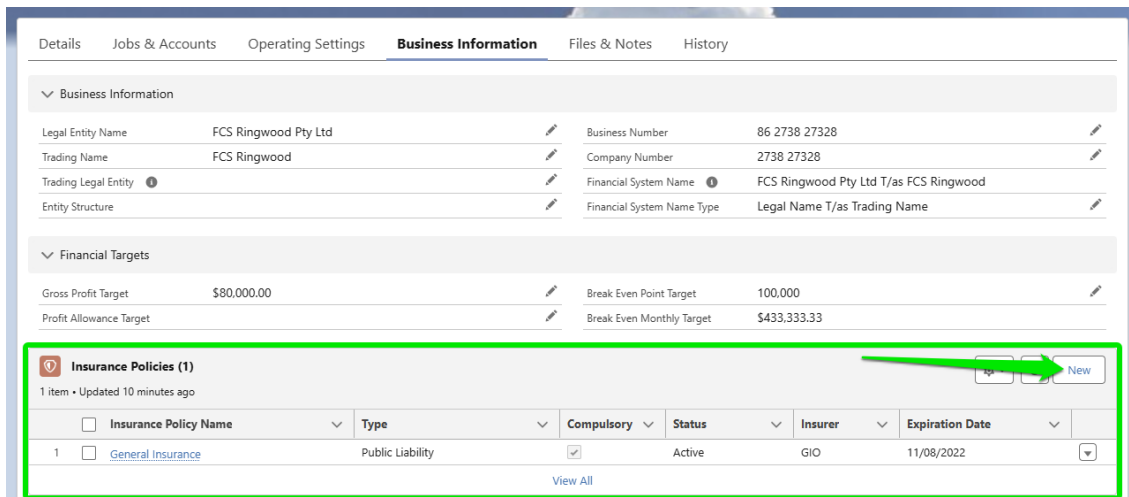
[View All](#)

**Territories (1)**

1 item • Updated 10 minutes ago

<input type="checkbox"/>	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

**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)**

1 item • Updated 10 minutes ago

<input type="checkbox"/>	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.



3. 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

Status

Insurer

Expiration Date

\*Account

Type

Compulsory ☒

Days Until Expiration

This field is calculated upon save

System Information

Created By

Currency

Last Modified By

Cancel

Save & New

Save

4. 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

☒

Active

GIO

11/08/2022

2

☐ Workers Compensation

Public Liability

☒

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

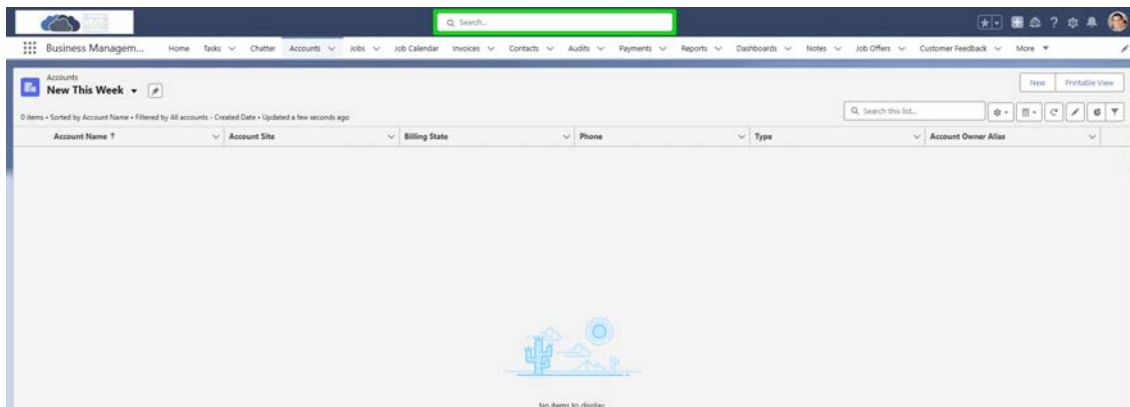
Salesforce provides a search mechanism that searches across many different types of records. This is useful when you know you have information in your system. It can also be useful to see if you have information in your system.



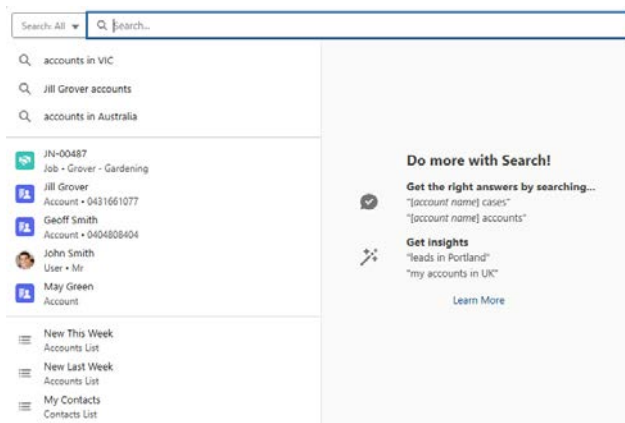
Let's say someone contacts you on the phone. You can use the search to see if they are an existing customer.

## How to search for information

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

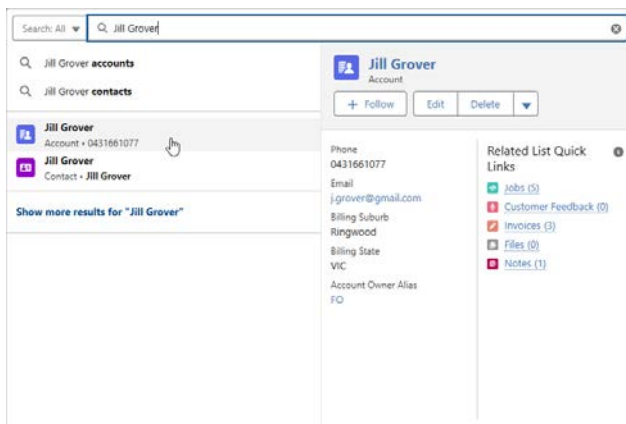


2. Click the **Search** box and you will see suggestions for searches along with recently viewed objects.

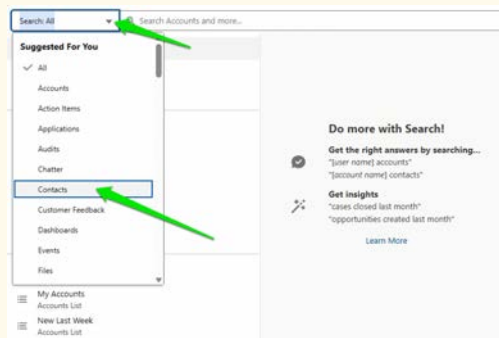


Access the search box by using the "/" keyboard shortcut.

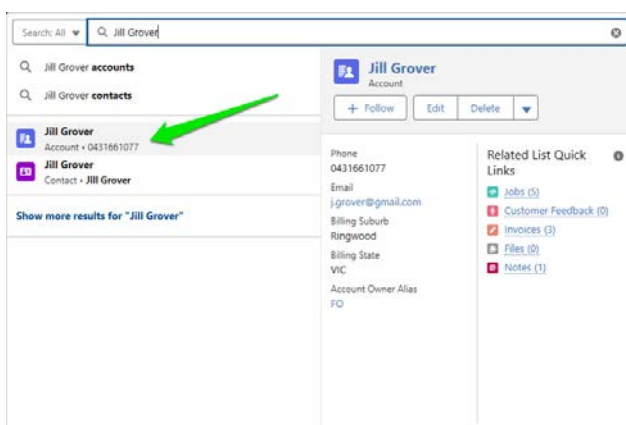
3. Enter some identifying information, such as a name, phone number, job number, invoice number, etc. Notice that the search results often consist of multiple types of records. You can easily identify which type of record you are most interested in. Hover over the record to see information from the record's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

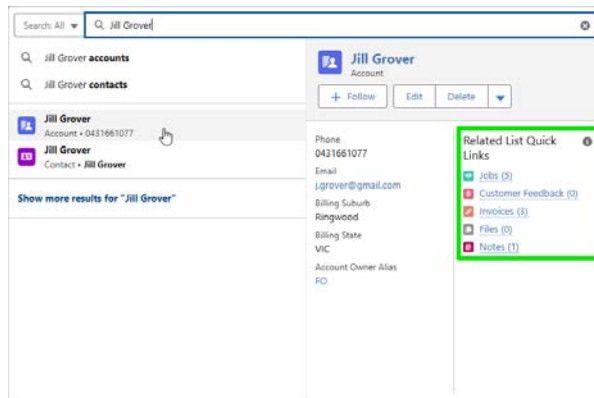


4. If you have located the desired record, click on it to view its page.



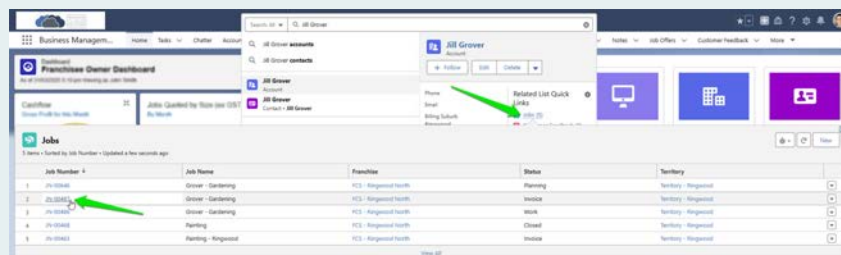
5. After finding the record, you can perform actions directly from the search box.

» You can access links that are found in the tabs on the record.

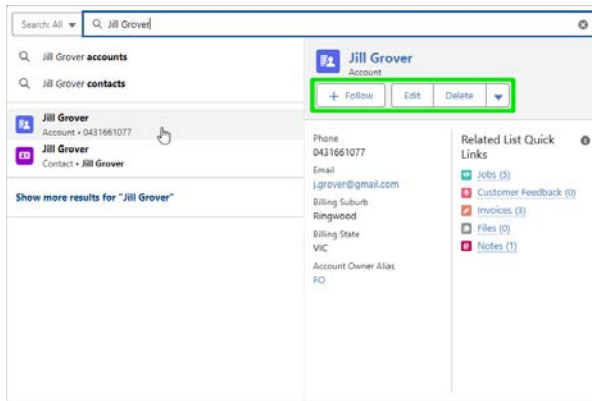


### Access a list of Jobs from the search box

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.

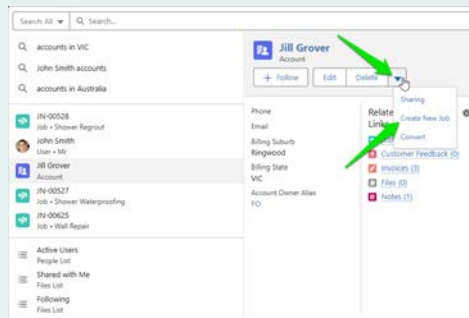


» You can access actions that are found on the record page.



### 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.



6. 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. The search bar at the top contains 'Jill Grover'. The search results are displayed in a table format, categorized by 'Jobs', 'Contacts', 'Accounts', and 'Files'. The 'Jobs' section shows five results with columns for Job Number, Job Name, Customer, Franchise, Status, and Territory. The 'Contacts' section shows one result with columns for Name, Account Name, Phone, Email, Mobile, Mailing Suburb, Mailing State, Contact One..., and Created Date. The 'Accounts' section shows one result with columns for Account Name, Phone, Email, Billing Suburb, Billing State, and Account Owner Alias. The 'Files' section shows one result with columns for Title, Size, File Extension, Last Modified Date, and Owner. At the bottom, there is a message: '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.'

Job Number	Job Name	Customer	Franchise	Status	Territory
JN-00485	Grover - Gardening	Jill Grover	FCS - Ringwood North	Planning	Territory - Ringwood
JN-00486	Grover - Gardening	Jill Grover	FCS - Ringwood North	Work	Territory - Ringwood
JN-00487	Grover - Gardening	Jill Grover	FCS - Ringwood North	Invoice	Territory - Ringwood
JN-00484	gardens3	Jill Grover	FCS - Ringwood North	Closed	Territory - Ringwood
JN-00483	gardens2	Jill Grover	FCS - Ringwood North	Invoice	Territory - Ringwood

Name	Account Name	Phone	Email	Mobile	Mailing Suburb	Mailing State	Contact One...	Created Date
Jill Grover	Jill Grover	0431661077	jill.grover@gmail.com	0431661077	Ringwood	VIC	FO	25/03/2020 2:03 am

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

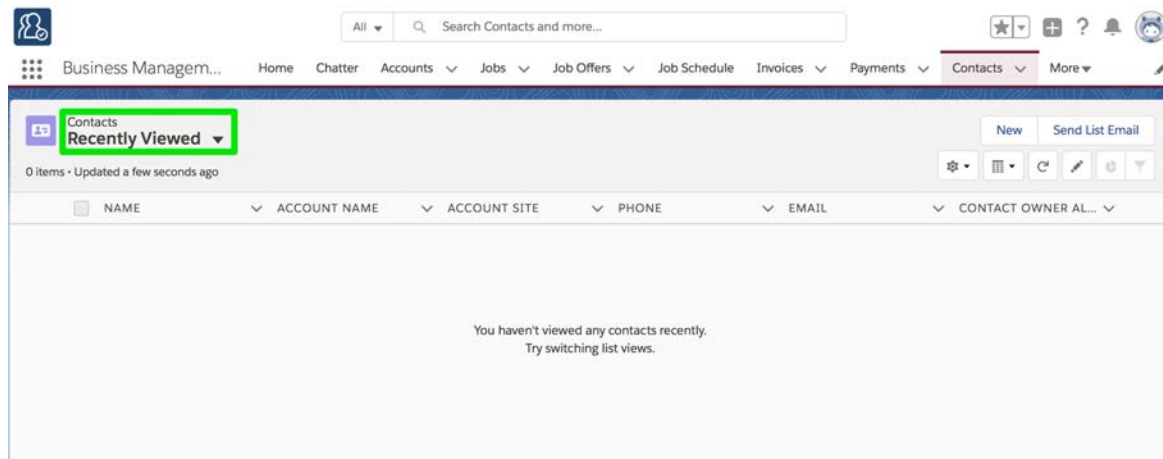
Title	Size	File Extension	Last Modified Date	Owner
INV-00054	20KB	pdf	21/01/2025 8:28 pm	John Smith

# 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.

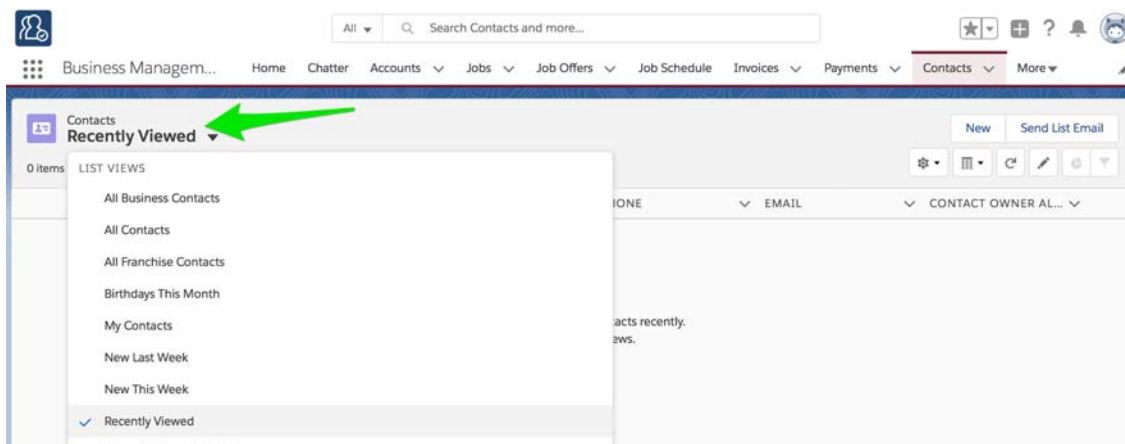
When you first open a menu, the first List View you see is likely to show you an empty list. Salesforce is showing you things you have viewed recently. This is known as the **Recently Viewed** List View.



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

To see some data

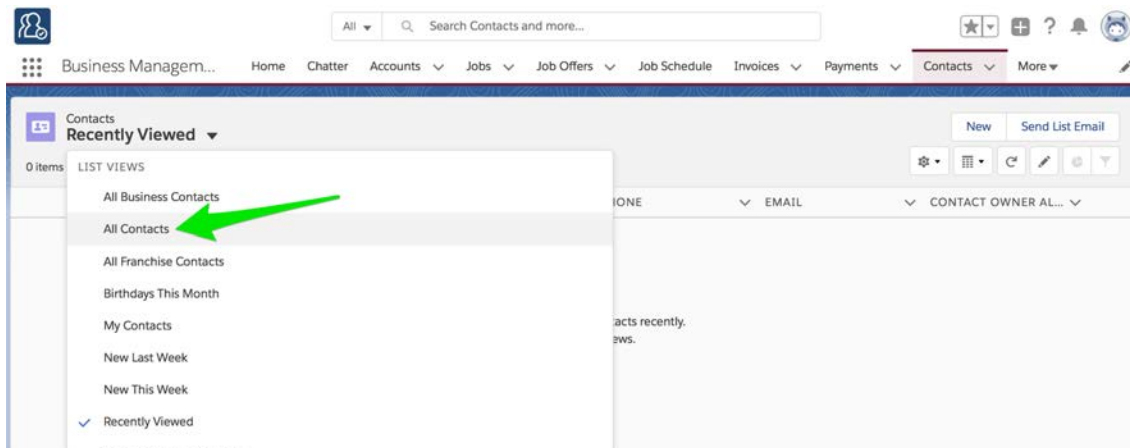
1. Click on **Recently Viewed**.



“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.

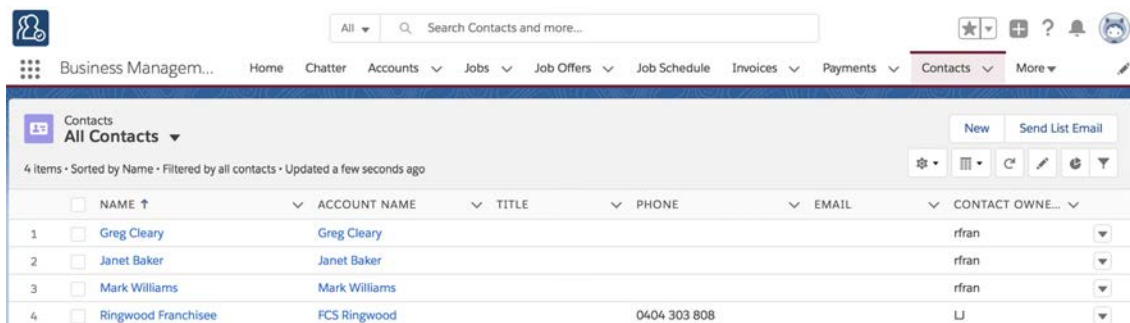


2. Click on any list containing the word “All.”

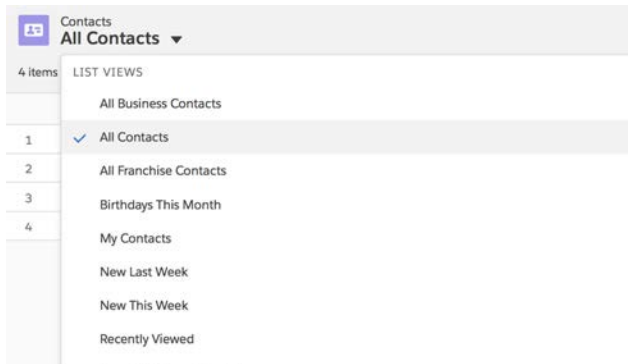


If there is data in your system, this list is likely to show it.

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

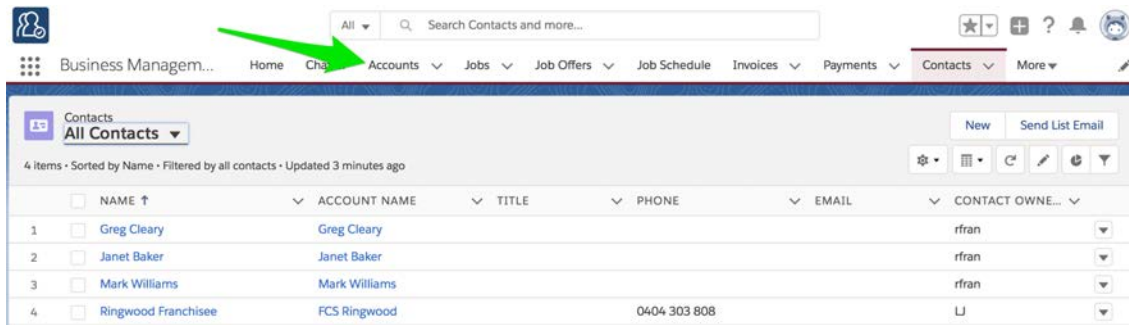


4. Now re-open the list view and notice the different types of views.



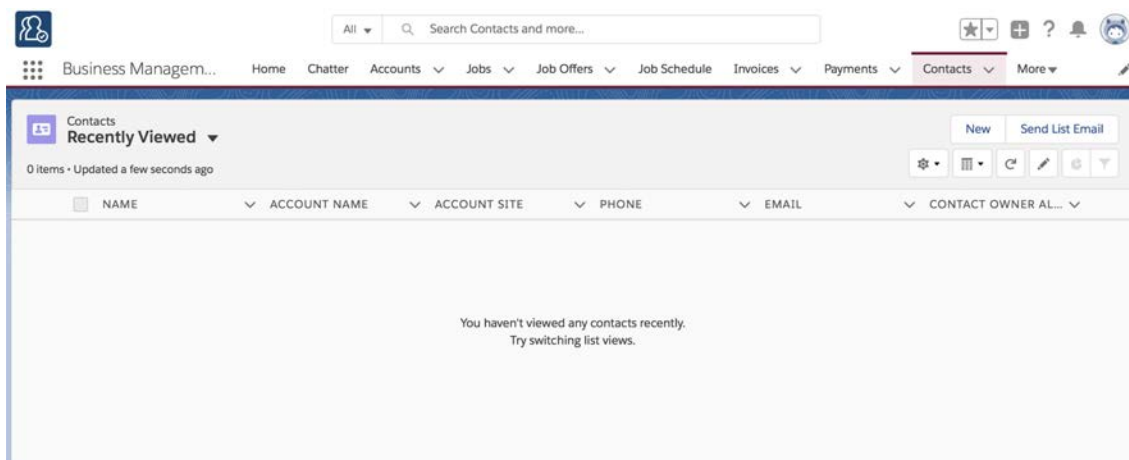
Each list potentially contains a different subset of records. Salesforce uses list views to make the amount of data you can see manageable.

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

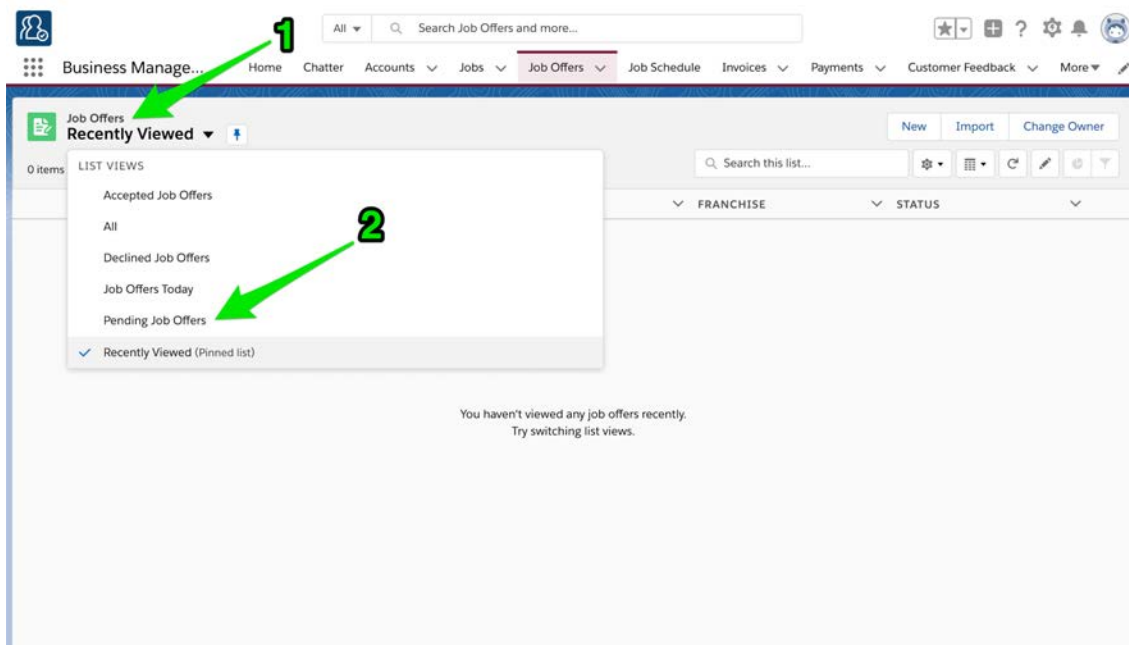
For many tabs, it is quite useful seeing the Recently Viewed list view when you first open the tab. Often times we work with particular items multiple times, and Recently Viewed helps you do this. But for some tabs, you may find it more useful to see another list view as the default. When this is the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



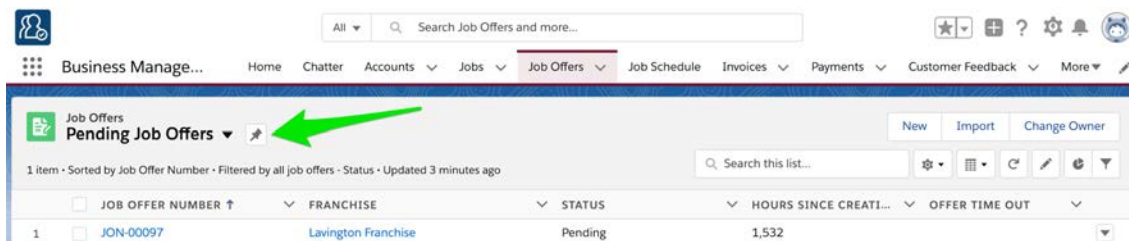
When you select the Job Offers tab, the only job offers you see on the Recently Viewed list are the ones you have already visited. Most times you go to the Job Offers tab, what you are really wanting to see are the new job offers. By following the procedure below, you will be able to set the Job Offers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

### To set a default list view

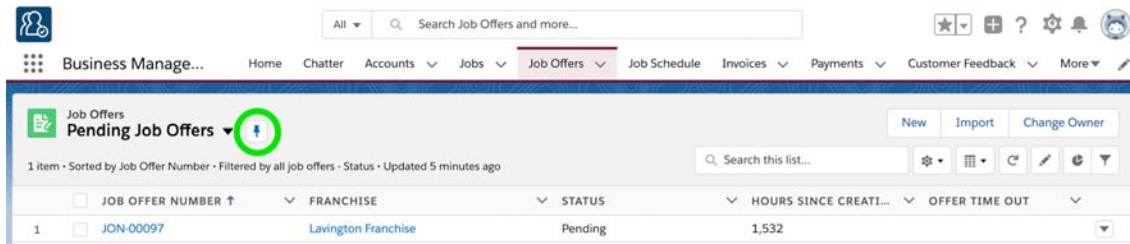
1. Open the List View control and select the List View you want as the initial view.



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 User Guide interface. The top navigation bar includes a search bar and a dropdown menu with options: Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, Customer Feedback, and More. The Job Offers tab is selected. Below the navigation bar, the Job Offers section is displayed. The Pending Job Offers list view is selected and pinned, indicated by a green circle around the pin icon. The list shows 1 item, sorted by Job Offer Number, filtered by all job offers, and updated 5 minutes ago. The table has columns: JOB OFFER NUMBER, FRANCHISE, STATUS, HOURS SINCE CREATI..., and OFFER TIME OUT. The first row shows a job offer with number JON-00097, franchise Lavington Franchise, status Pending, and hours since creation 1,532.

	JOB OFFER NUMBER ↑	FRANCHISE	STATUS	HOURS SINCE CREATI...	OFFER TIME OUT
1	JON-00097	Lavington Franchise	Pending	1,532	



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.

Business Management...

Search Jobs and more...

Jobs

Jobs with Balance Owing

17 items • Sorted by Job Number • Updated a few seconds ago

	JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY
1	<input type="checkbox"/> JN-00183	Painting Fence, Bondi B...	Ronald Ph...			
2	<input type="checkbox"/> JN-00173					
3	<input type="checkbox"/> JN-00172		Genevieve ...			
4	<input type="checkbox"/> JN-00171					
5	<input type="checkbox"/> JN-00169		Bondi We...			
6	<input type="checkbox"/> JN-00167		Ronald Ph...			
7	<input type="checkbox"/> JN-00166					
8	<input type="checkbox"/> JN-00161	Hamilton, Bondi Beach	Alexander ...			
9	<input type="checkbox"/> JN-00160	Painting Fence, Bondi B...	Ronald Ph...			
10	<input type="checkbox"/> JN-00159	Campbell, Bondi Beach	Alistair Ca...			
11	<input type="checkbox"/> JN-00154					

Field: # Jobs

Operator: equals

Value:

Done

Filters

Show me All jobs

Matching all of these filters

New Filter\*

Add Filter Remove All

Add Filter Logic

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

Business Management...

Search Jobs and more...

Jobs

Jobs with Balancing Owing

17 items • Sorted by Job Number • Updated a few seconds ago

	JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY
1	<input type="checkbox"/> JN-00183	Painting Fence, Bondi B...	Ronald Ph...			
2	<input type="checkbox"/> JN-00173					
3	<input type="checkbox"/> JN-00172		Genevieve ...			
4	<input type="checkbox"/> JN-00171					
5	<input type="checkbox"/> JN-00169		Bondi We...			
6	<input type="checkbox"/> JN-00167		Ronald Ph...			
7	<input type="checkbox"/> JN-00166					
8	<input type="checkbox"/> JN-00161	Hamilton, Bondi Beach	Alexander ...			
9	<input type="checkbox"/> JN-00160	Painting Fence, Bondi B...	Ronald Ph...			
10	<input type="checkbox"/> JN-00159	Campbell, Bondi Beach	Alistair Ca...			
11	<input type="checkbox"/> JN-00154					

Field: Balance Owing

Operator: greater than

Value: 0.00

Done

Filters

Show me All jobs

Matching all of these filters

New Filter\*

Add Filter Remove All

Add Filter Logic



## 6. Now press Save.

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

Jobs  
Jobs with Balancing Owing ▾  
17 items • Sorted by Job Number • Updated 3 minutes ago

<input type="checkbox"/>	JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY
1	<input type="checkbox"/> JN-00183	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
2	<input type="checkbox"/> JN-00173			FCS Bondi...	Assigned	Territory (D) - Bondi Bea...
3	<input type="checkbox"/> JN-00172		Genevieve ...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...
4	<input type="checkbox"/> JN-00171			FCS Bondi...	Assigned	Territory (D) - Bondi Bea...
5	<input type="checkbox"/> JN-00169		Bondi We...	FCS Bondi...	Assigned	Territory (D) - Bondi Bea...
6	<input type="checkbox"/> JN-00167		Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...
7	<input type="checkbox"/> JN-00166			FCS Bondi...	Assigned	Territory (D) - Bondi Bea...
8	<input type="checkbox"/> JN-00161	Hamilton, Bondi Beach	Alexander ...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
9	<input type="checkbox"/> 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  
Jobs with Balancing Owing ▾  
9 items • Sorted by Job Number • Filtered by Balance Owing • Updated a few seconds ago

<input type="checkbox"/>	JOB NU...	JOB NAME	CUSTOMER	FRANCHISE	STATUS	TERRITORY
1	<input type="checkbox"/> JN-00183	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
2	<input type="checkbox"/> JN-00172		Genevieve ...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...
3	<input type="checkbox"/> JN-00167		Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...
4	<input type="checkbox"/> JN-00161	Hamilton, Bondi Beach	Alexander ...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
5	<input type="checkbox"/> JN-00160	Painting Fence, Bondi B...	Ronald Ph...	FCS Bondi...	Invoice	Territory (D) - Bondi Bea...
6	<input type="checkbox"/> JN-00150	Front Yard Pruning	Sally Smith	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
7	<input type="checkbox"/> JN-00149	Painting and Fencing Job	James Bro...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
8	<input type="checkbox"/> JN-00148	Mattress Disposal	Test99 Tes...	FCS Bondi...	Closed	Territory (D) - Bondi Bea...
9	<input type="checkbox"/> 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  
Jobs with Balancing Owing ▾  
9 items • Sorted by Job Number • Filtered by Balance Owing • Updated 2 minutes ago

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

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

Jobs Recently Viewed 13 items • Updated a few seconds ago

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...

LIST VIEW CONTROL

- New
- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

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

New List View

\*List Name

New Jobs

Who sees this list view?

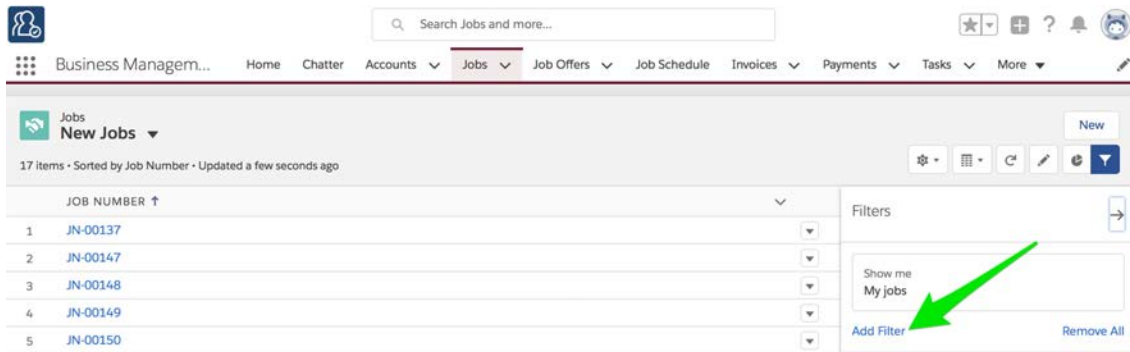
☒ Only I can see this list view

☐ All users can see this list view

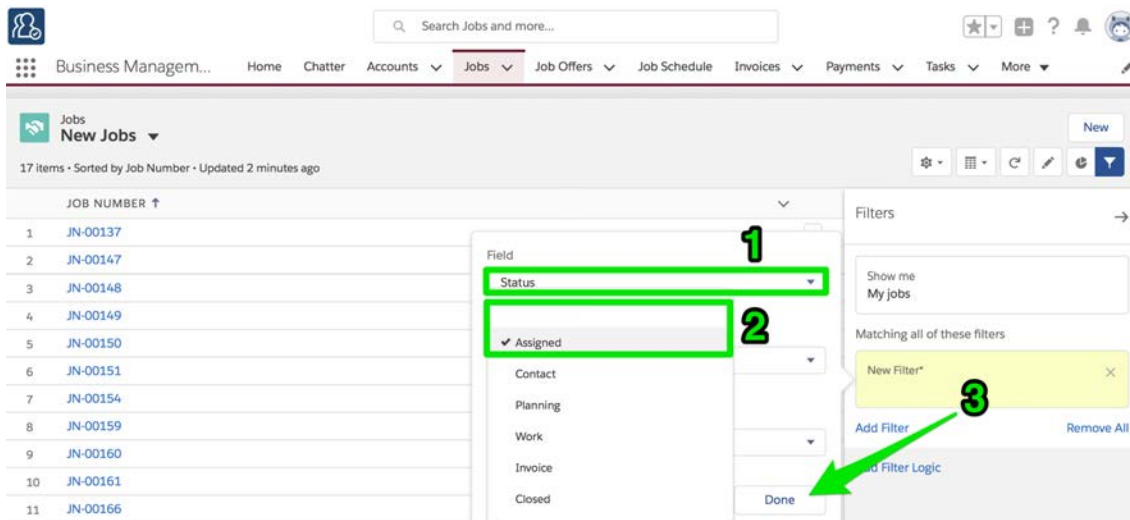
Cancel Save

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

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

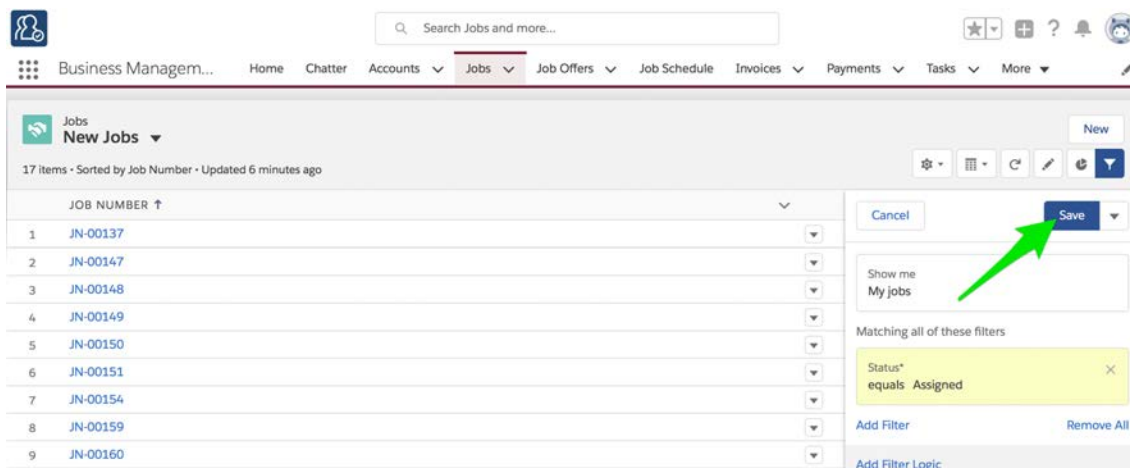


4. Use the **Field**, **Operator** and **Value** fields to set the new condition, then press **Done**.

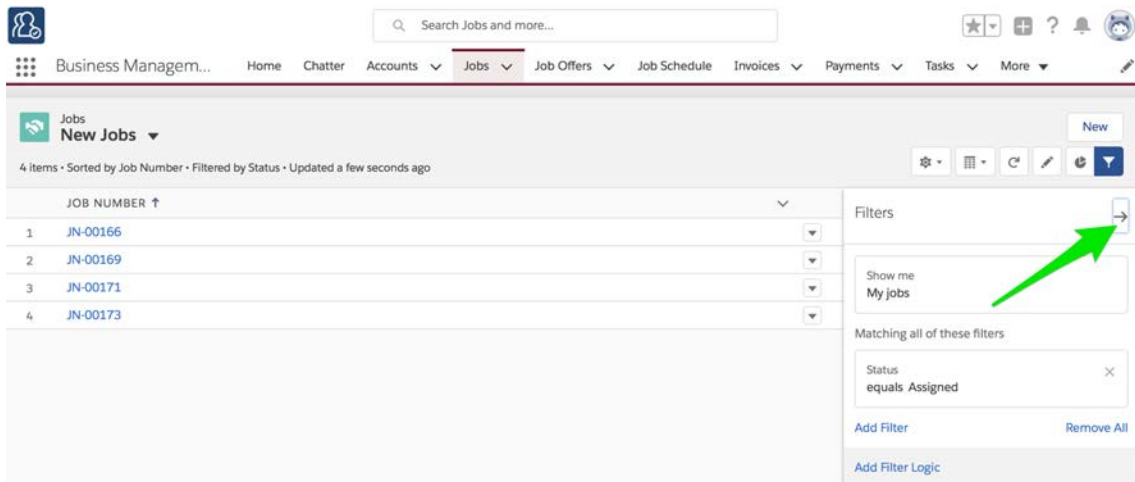


In the above image **Operator** is set to *equals*.

5. Press **Save**.

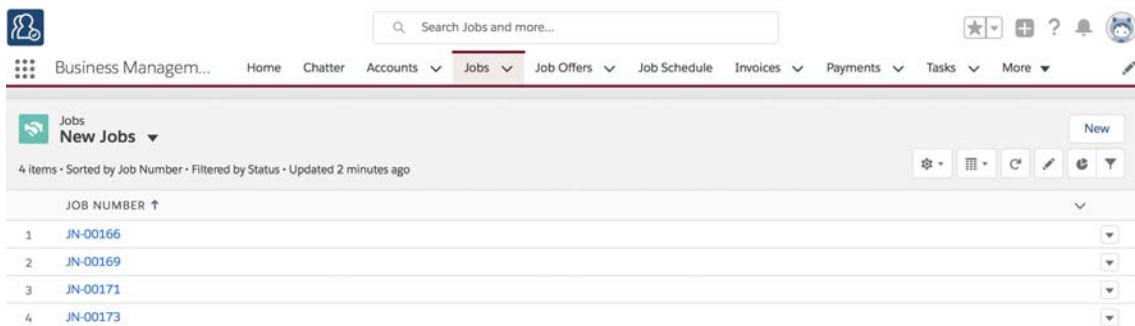


6. Press the arrow to remove the **Filters** pane.



The screenshot shows the Business Management interface. The top navigation bar includes a search bar and various menu items. The 'Jobs' menu is expanded, showing 'New Jobs' and a list of 4 items. The 'Filters' pane is visible on the right, showing a filter for 'Status equals Assigned'. A green arrow points to the close button (X) on the Filters pane.

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



The screenshot shows the Business Management interface after the Filters pane has been removed. The 'Jobs' menu is expanded, showing 'New Jobs' and a list of 4 items. The 'Filters' pane is no longer visible.



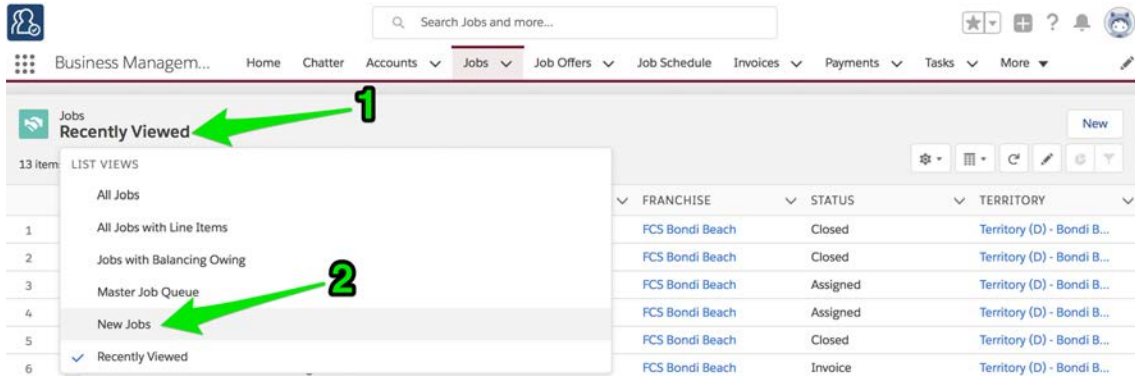
To make this list view more useful, add some extra columns to it. See “How to add columns to a list view” on the facing page.

## How to add columns to a list view

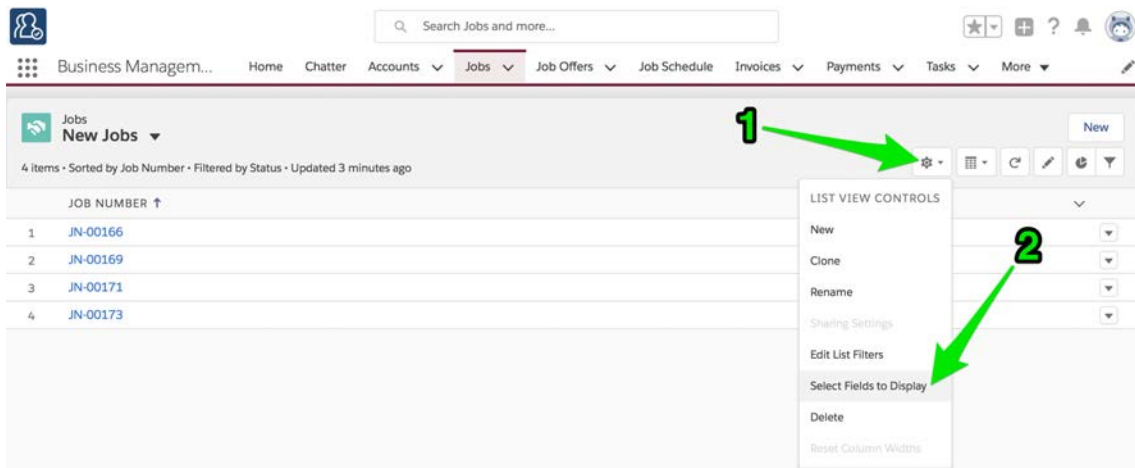
You can add columns to any custom list view.

### To add columns to a custom list view

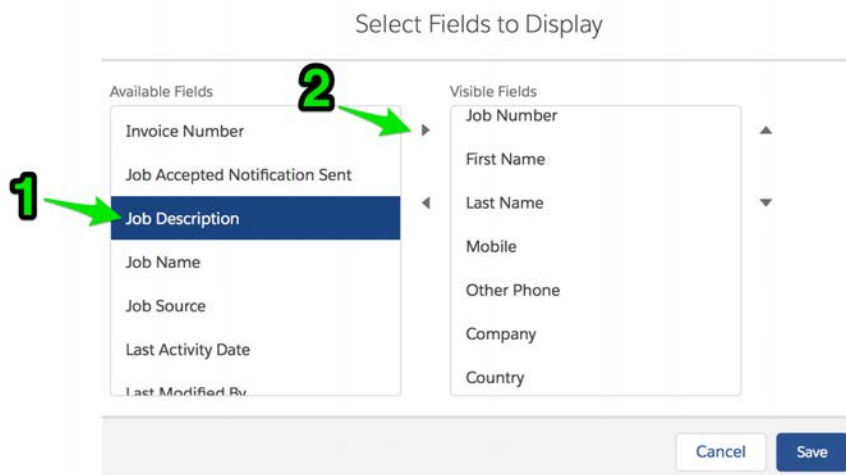
1. From **Recently Viewed**, select a custom list.



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.

Select Fields to Display

Available Fields

- Invoice Number
- Job Accepted Notification Sent
- Job Name
- Job Source
- Last Activity Date
- Last Modified By
- Last Modified By Alias

Visible Fields

- First Name
- Last Name
- Mobile
- Other Phone
- Company
- Country
- Job Description

Cancel Save

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

Select Fields to Display

Available Fields

- How Did You Hear of Us?
- If other reasons, please specify
- Invoice Number
- Job Accepted Notification Sent
- Job Name
- Job Source
- Last Activity Date

Visible Fields

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

Cancel Save

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

Select Fields to Display

---

Available Fields

Visible Fields

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

1

Job Number  
First Name  
Last Name  
Mobile  
Other Phone  
Job Description

2

Cancel

Save

Now you can see the updated list.

Business Management

Home Chatter Accounts Jobs Job Offers Job Schedule Invoices Payments Tasks More

Search Jobs and more...

Star Add Help Chatbot

Jobs

New Jobs

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

Settings Columns Refresh Edit Export Filter

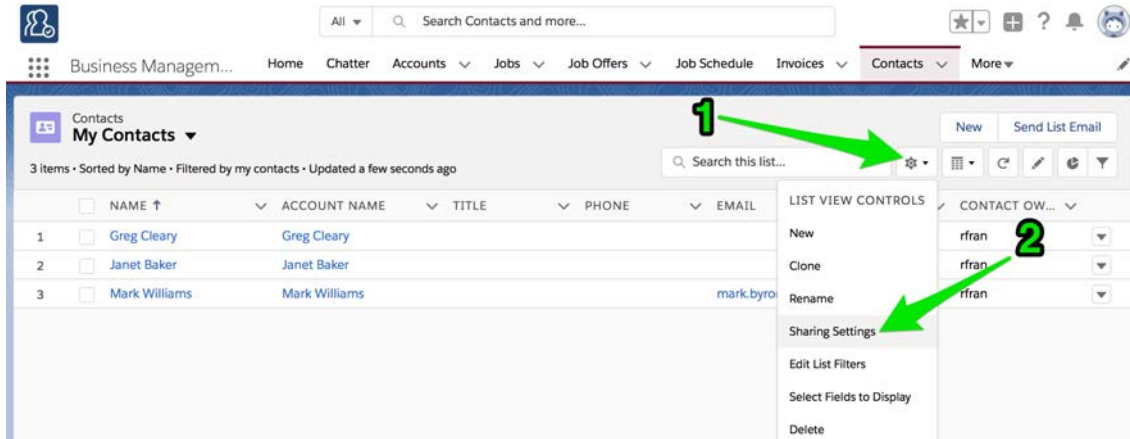
	JOB NUMBER ↑	FIRST NAME	LAST NAME	MOBILE	OTHER PHONE	JOB DESCRIPTION
1	<input type="checkbox"/> JN-00166	Mark	Guinness	0404789400		Mortgage
2	<input type="checkbox"/> JN-00169	Anita	Smith			Mortgage
3	<input type="checkbox"/> JN-00171	Alexander	Hamilton			Roofing
4	<input type="checkbox"/> JN-00173	George	Barker			Roofing

## How to share list views

You can share your list views with your colleagues.

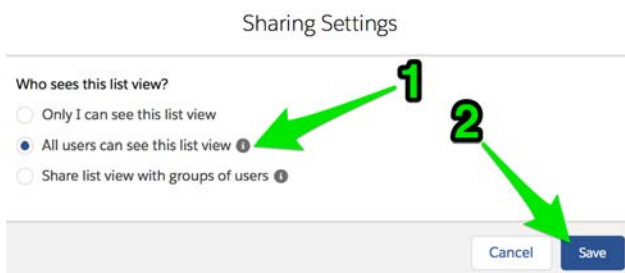
### To share a list view

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

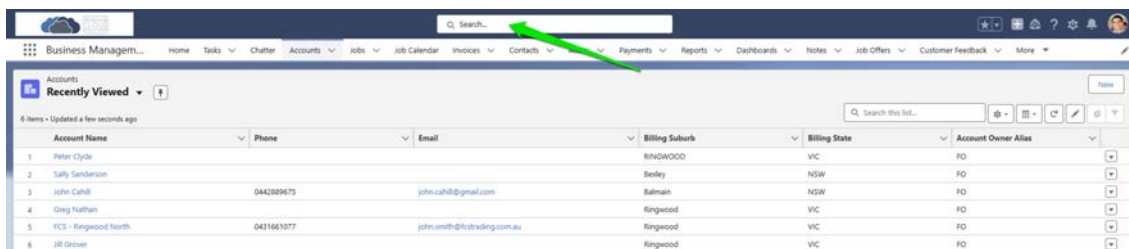
The ideal time to create a new account is on first contact with the customer. When a customer contacts you, we recommend you search customer accounts to see whether this person or business is already a customer. Doing this will help you avoid creating duplicate accounts.



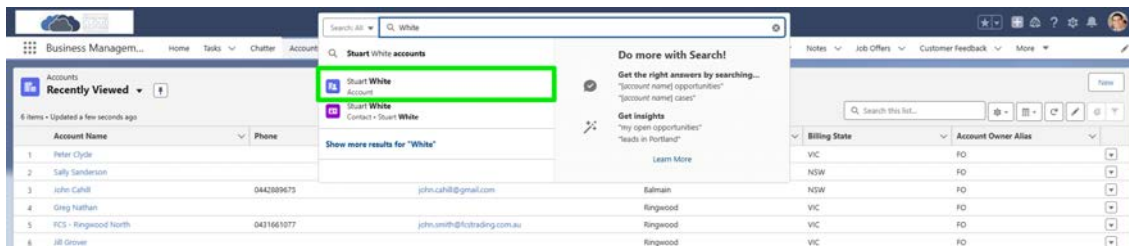
Part of demonstrating the value of your customer base is showing how many of them are repeat customers, so you want to avoid creating duplicate accounts if you can at all help it.

## 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.



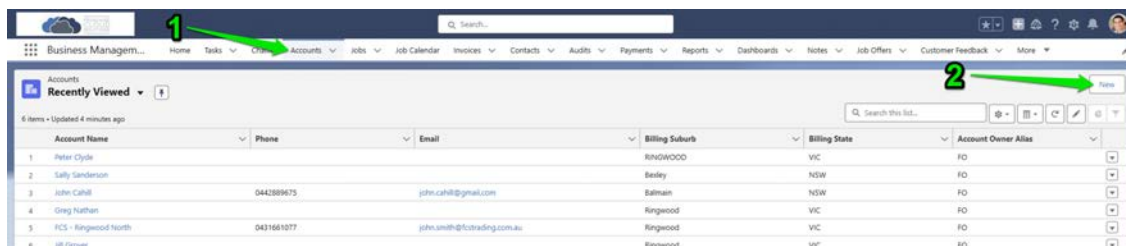
2. If any of the search results match the person or business that you are searching for then you can select and use this account.
3. If you cannot find the person or business you are searching for, you will want to create a new account.

# 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.

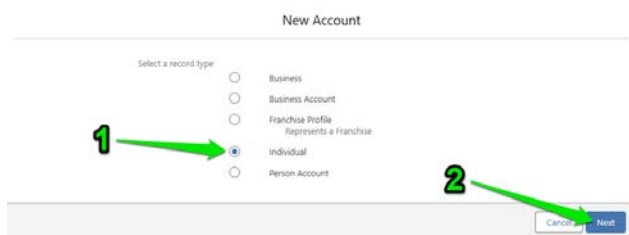
## To create an individual account

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



The **New Account** dialog box appears.

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

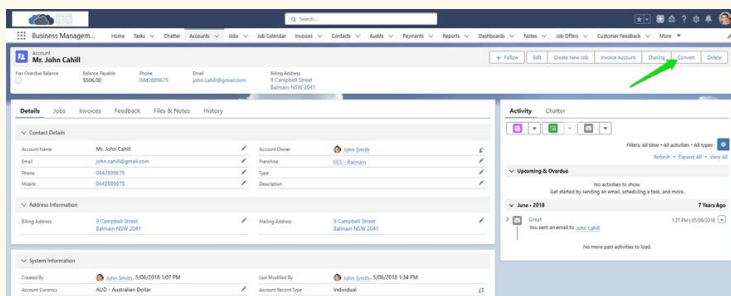


The **New Account: Individual** dialog box appears.

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

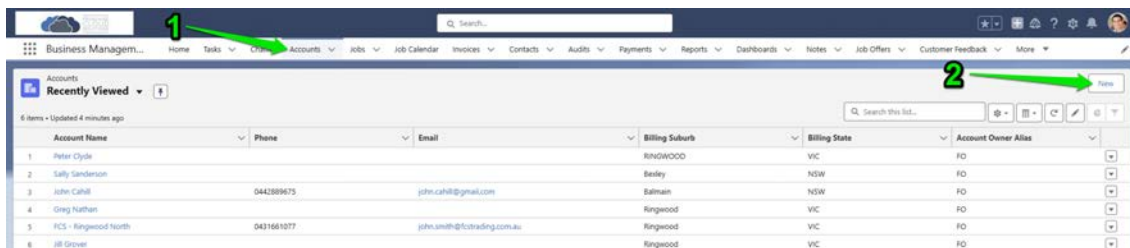
A “business” account type represents a commercial entity with multiple contacts. They can also be used to represent suppliers. Many contacts can be associated with a single business account.



- » 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.

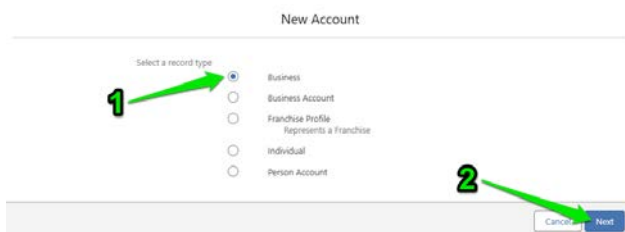
## To create a business account

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.

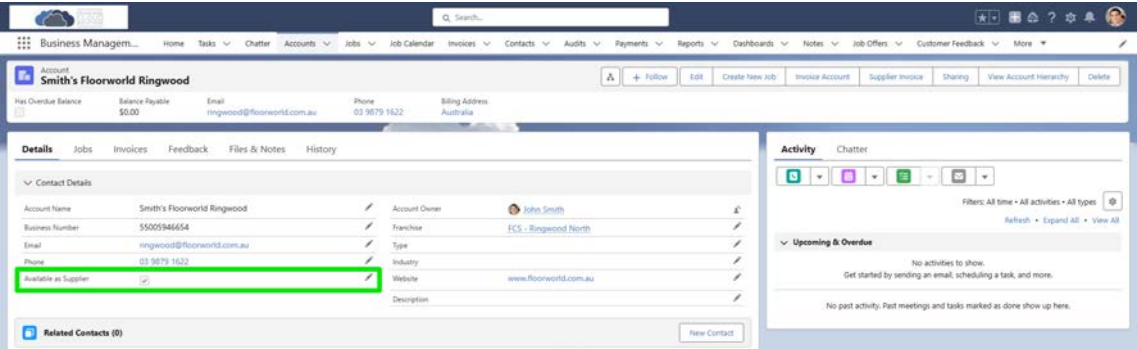
3. Now complete the account creation by entering all relevant details then pressing **Save**.



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

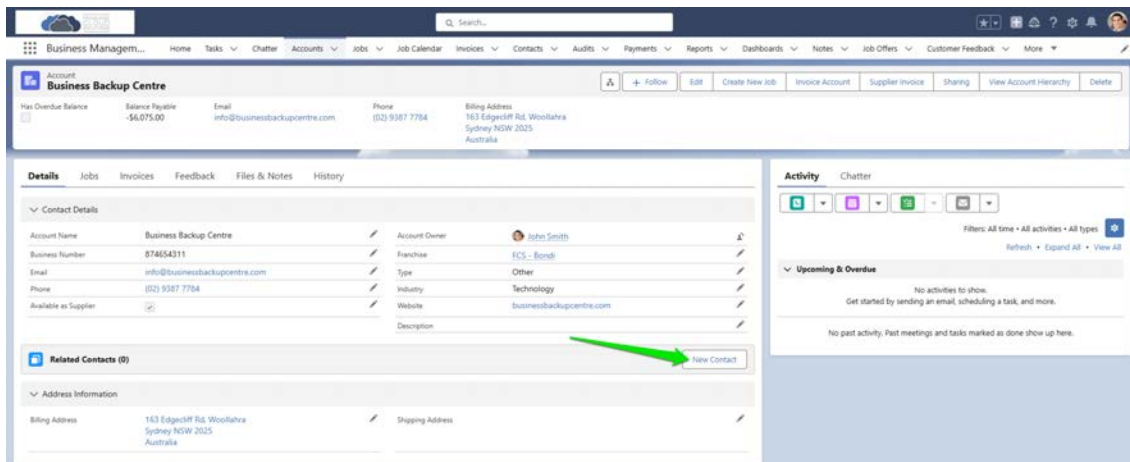
» Check the Available as Supplier check box.



# How to add a contact to a business account

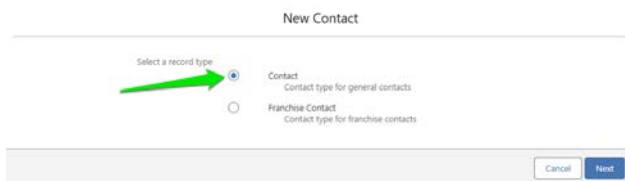
To add a contact to a business account

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.

3. 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

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.

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

Business Management...

Business Backup Centre

Has Overdue Balance Balance Payable -\$6,075.00 Email info@businessbackupcentre.com Phone (02) 9387 7784 Billing Address 163 Edgecliff Rd, Woollahra Sydney NSW 2025 Australia

Details Jobs Invoices Feedback Files & Notes History

Contact Details

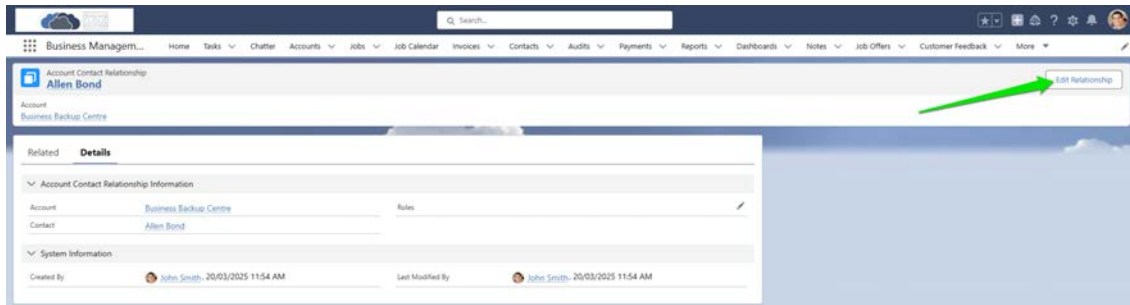
Account Name	Business Backup Centre	Account Owner	John Smith
Business Number	874654311	Franchise	ICS - Bondi
Email	info@businessbackupcentre.com	Type	Other
Phone	(02) 9387 7784	Industry	Technology
Available as Supplier	<input checked="" type="checkbox"/>	Website	businessbackupcentre.com
		Description	

Related Contacts (1)

Contact Name	Account Name	Title	Email	Phone	Relationship
Allen Bond	Business Backup Centre	CEO	allen@businessbackupcentre.com	(02) 9387 7784	View Relationship Edit Relationship

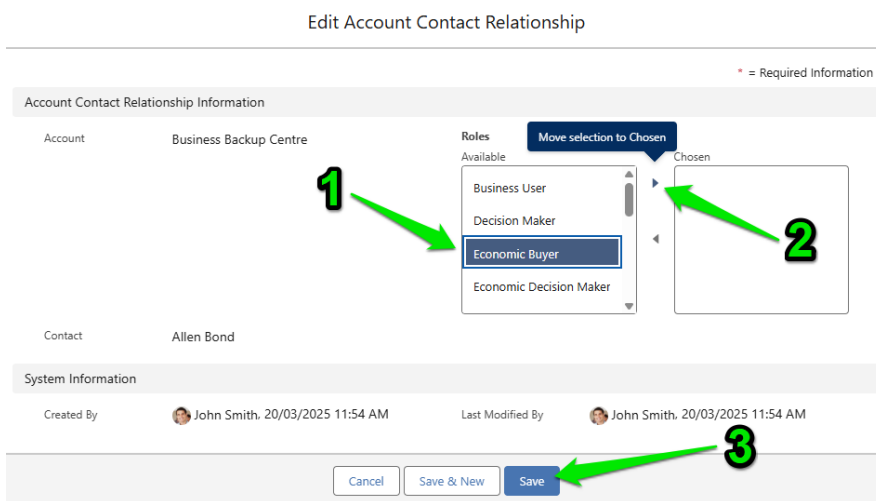
The Account Contact Relationship page appears.

5. Press **Edit Relationship**.



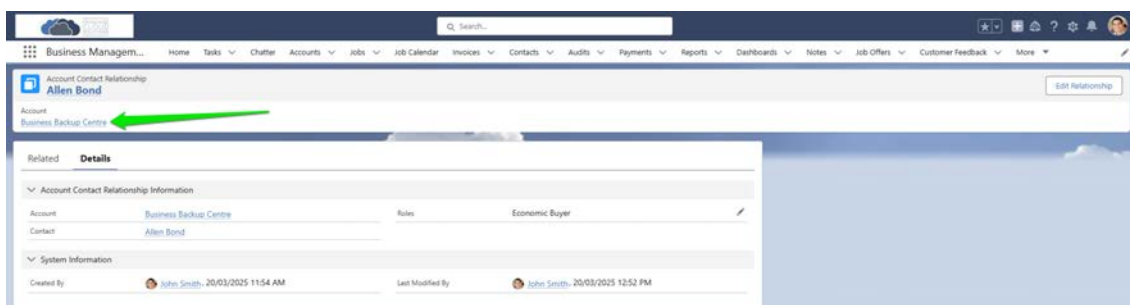
The **Edit Account Contact Relationship** dialog box appears.

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.



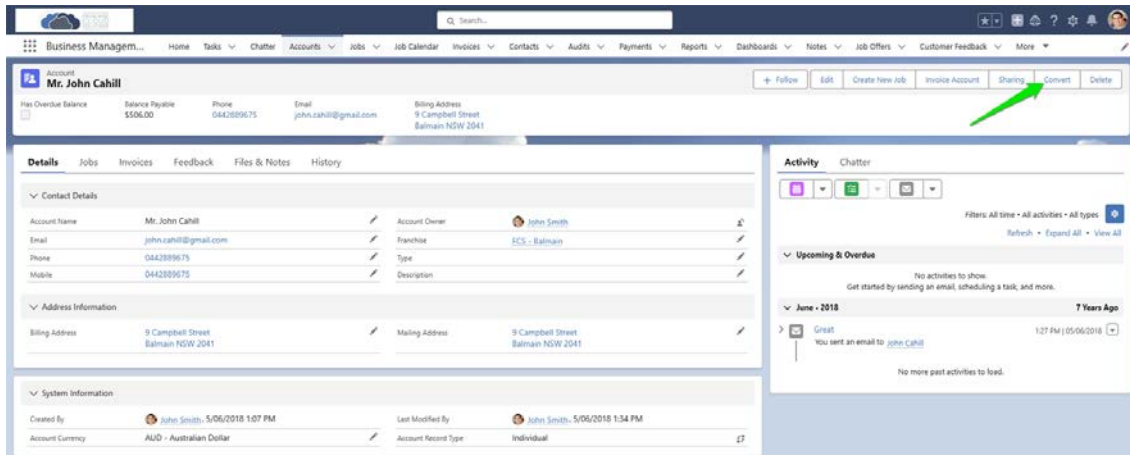


# How to convert an individual account into a business account

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

Please enter the 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.

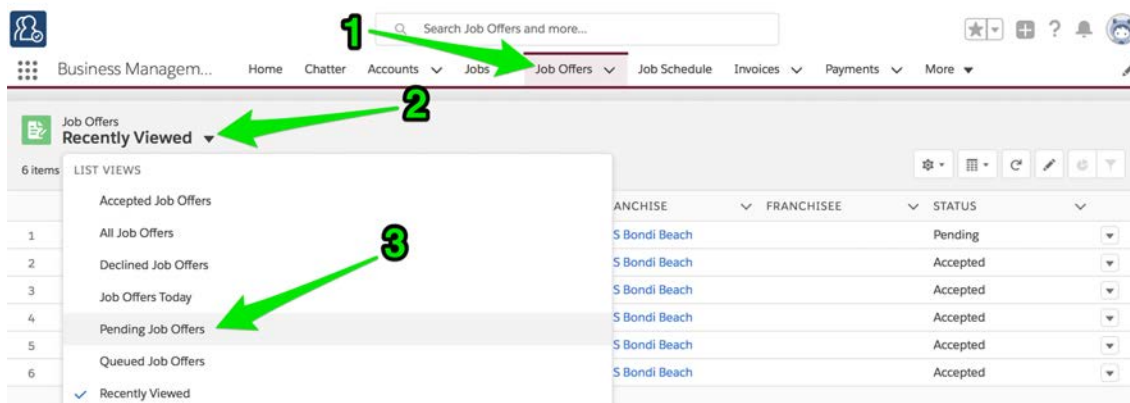
In most cases, you need to accept the offer within the job offer time-frame in order for the job to be allocated to your business. If you decline or ignore the job offer, the job is usually offered to the next-best placed franchise.

# 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.

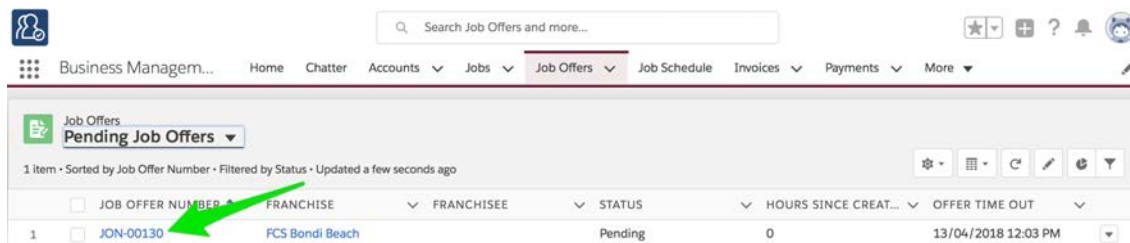
## To accept a Job Offer within Salesforce

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

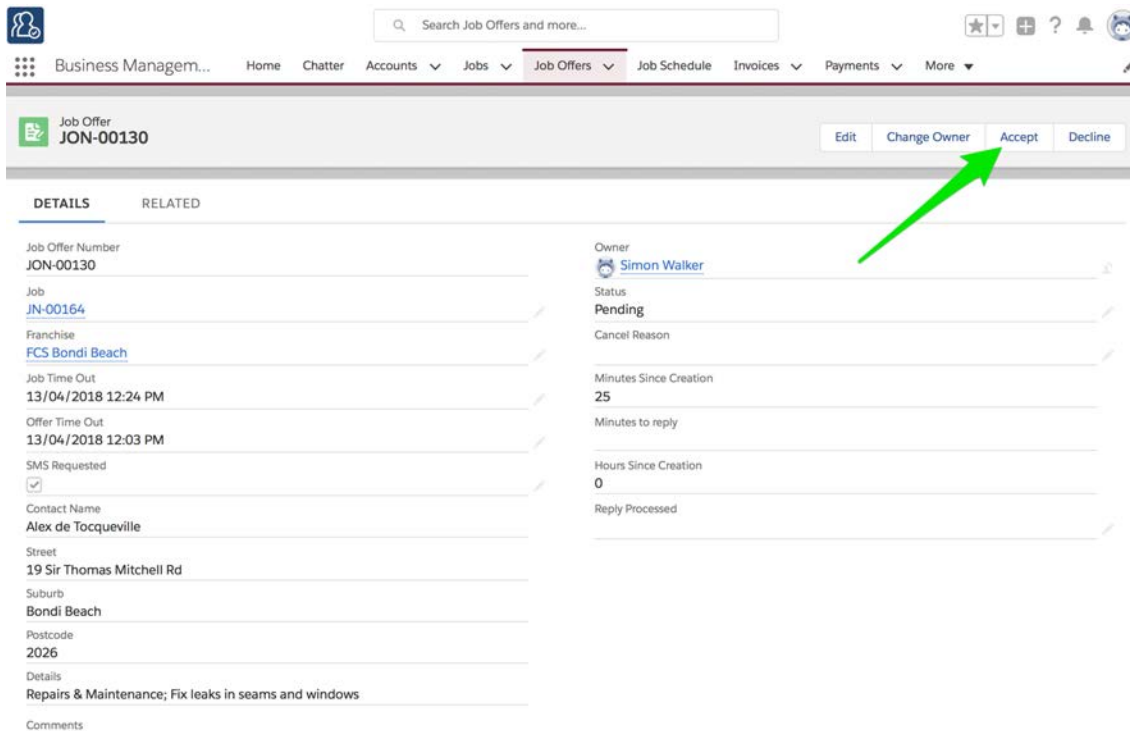


You can see the job offers currently available to your franchise.

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



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

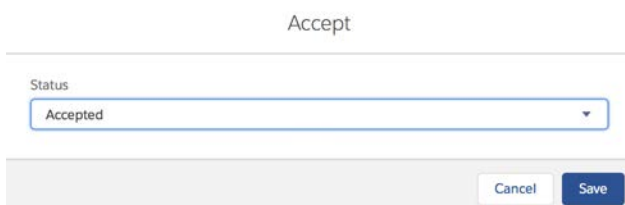


The screenshot shows the 'Job Offer' details page for 'JON-00130'. The page has a navigation bar at the top with 'Business Management...' and various menu items like 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. Below the navigation bar, there's a search bar and a user profile icon. The main content area is divided into two columns. The left column contains details about the job offer, including the job offer number, job number, franchise, job time out, offer time out, SMS requested, contact name, street, suburb, postcode, and details. The right column contains details about the owner, status, cancel reason, minutes since creation, minutes to reply, hours since creation, and reply processed. At the top right of the main content area, there are four buttons: 'Edit', 'Change Owner', 'Accept', and 'Decline'. A green arrow points to the 'Accept' button.



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

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



The screenshot shows the 'Accept' dialog box. It has a title bar that says 'Accept'. Below the title bar, there's a 'Status' dropdown menu with 'Accepted' selected. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Save'.

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.

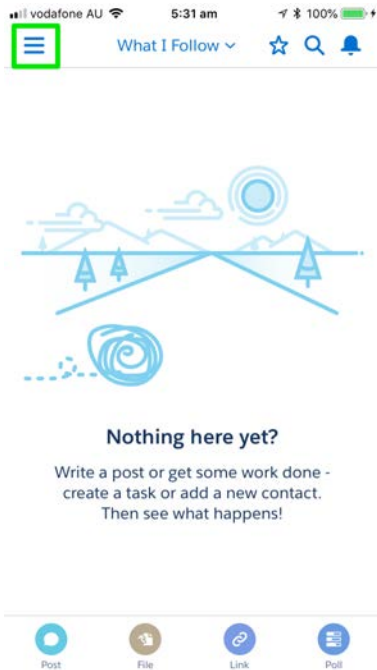
# How to respond to job offers in Salesforce Mobile



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

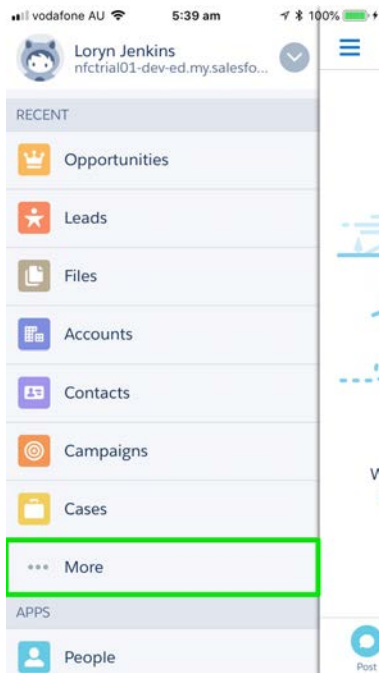
## To respond to a Job Offer in Salesforce Mobile

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

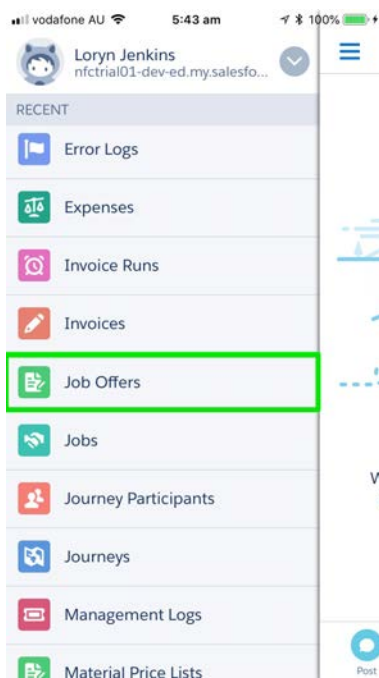


The Salesforce menu opens.

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



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

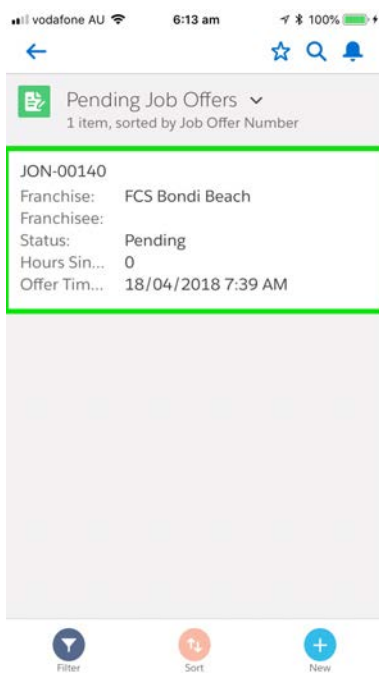


4. From the **Job Offers** page, select the **Pending Job Offers** list view.



The list of currently available job offers displays.

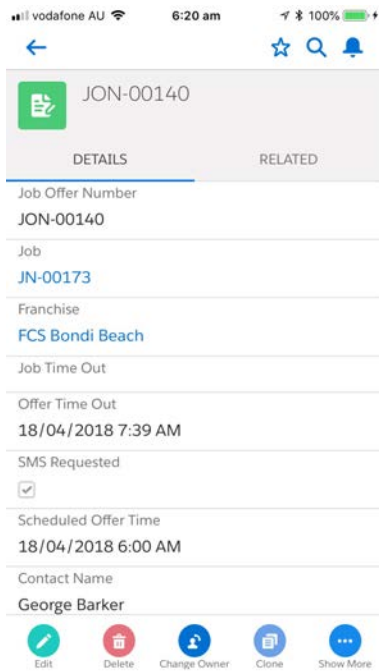
5. Select a **Job Offer**.



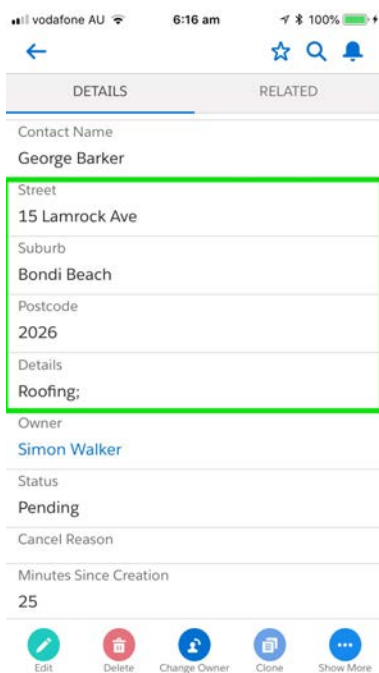
The **Job Offer** opens.



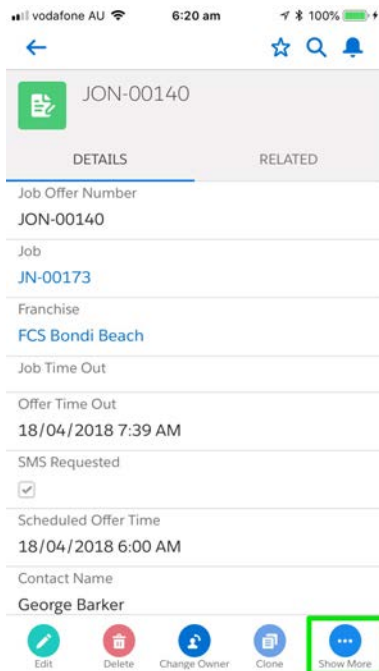
6. You have a Job Offer open in the mobile Salesforce app.



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

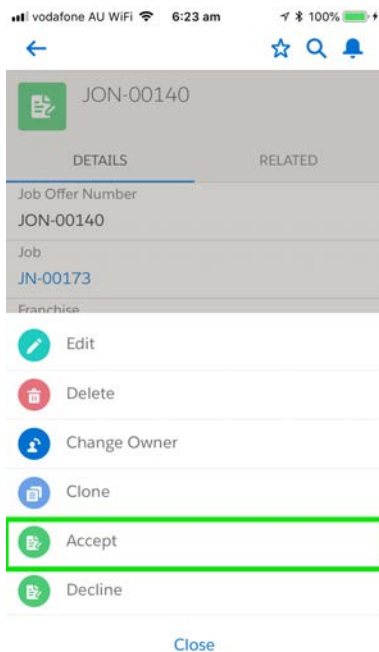


8. When you want to accept the job offer, press **Show more**.



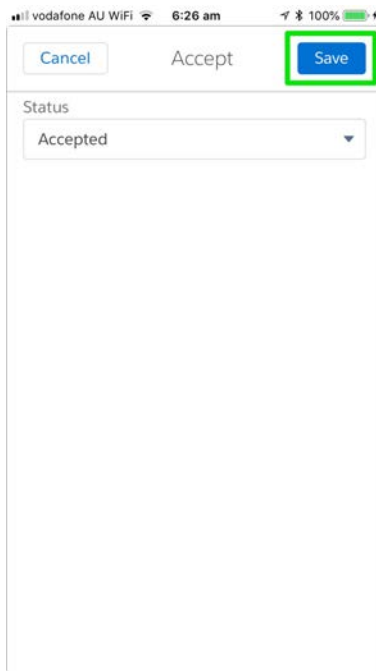
The **Show more** menu displays.

9. Press **Accept**.



The **Accept** dialog box opens.

10. Press **Save**.



A screenshot of a mobile application interface. At the top, the status bar shows 'vodafone AU WiFi', '6:26 am', and '100%' battery. Below the status bar, there are three buttons: 'Cancel' (light blue), 'Accept' (grey), and 'Save' (blue). The 'Save' button is highlighted with a green rectangular border. Below the buttons, there is a 'Status' section with a dropdown menu currently set to 'Accepted'. The rest of the screen is a large, empty white space.

You have now accepted the Job Offer.



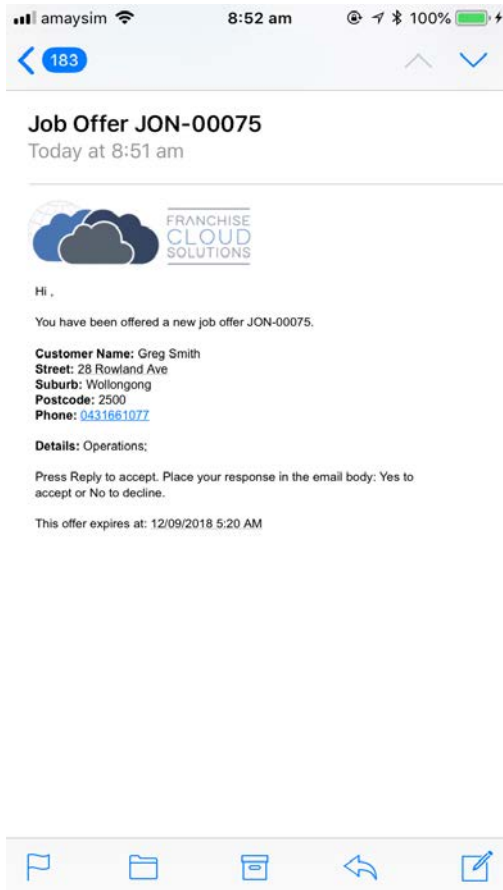
The Job is now ready for you to begin working. See “Working with Jobs” on page cii.

# How to respond to job offers by email

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

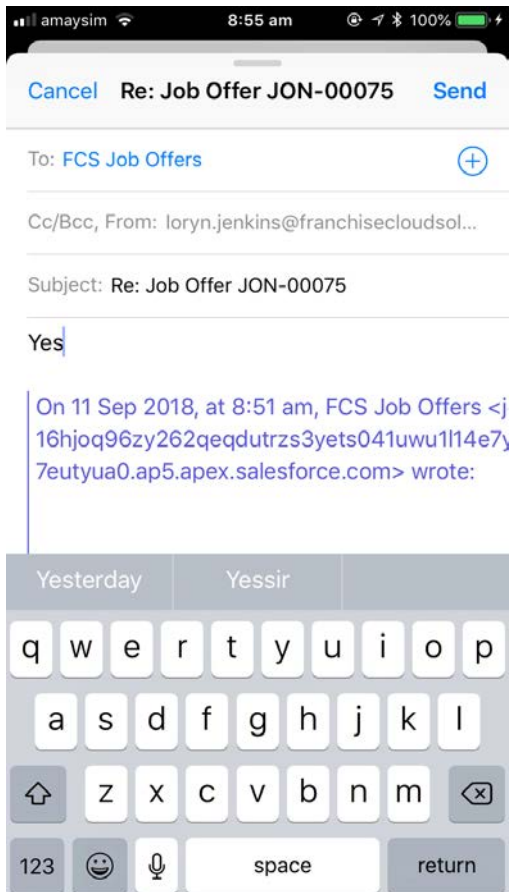
## To respond to job offers by email

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.



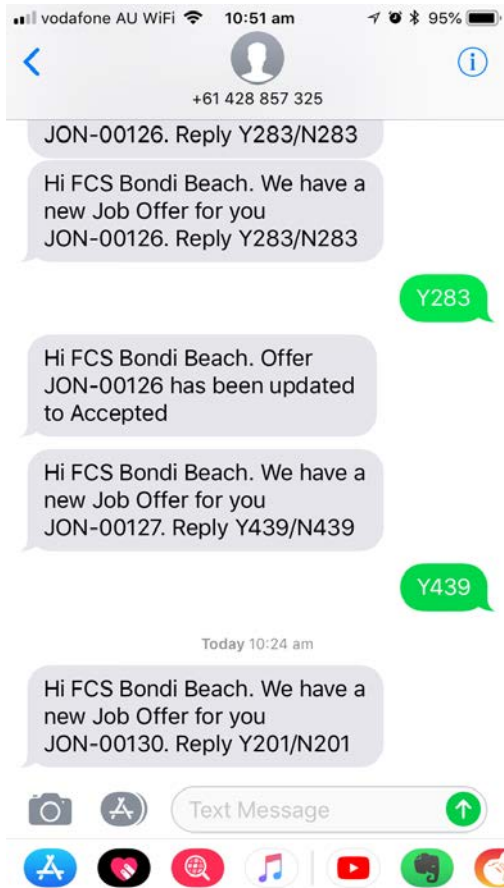
All email and SMS messages shown in this document are examples only. Messages you receive are customized for your business during implementation, and may contain information different from that shown here.

# 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

Understanding jobs .....	civ
Information stored on a job .....	civ
Actions available from a job .....	civ
Statutes of a job .....	cv
Working with new jobs .....	cxii
How to find newly assigned jobs .....	cxii
First customer contact .....	cxiv
How to create a new job .....	cxxi
Choose a customer contact for a business job .....	cxxiii
Job planning and estimation .....	cxxv
Understanding the job planning page .....	cxxvii
How to create a new line item .....	cxxxi
Quick quote: Adjust labour and material summaries .....	cxxxvi
Detailed quote: Add job tasks and work estimates .....	cxxxviii
Detailed quote: Add materials and material estimates .....	cxliii
How to add a new material to a price list .....	cxlviii
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How to clone a job ..... clxxiv

How to return to the Job ..... clxxv

How to print a materials shopping list ..... clxxv

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 path-way 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	<b>Job Planning causes transition.</b> 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	<b>Quote Job, Email Send causes transition.</b> 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"> <li>» Waiting for a deposit</li> <li>» Waiting on material or a signature</li> </ul> <p>Selecting a Substatus Reason is mandatory.</p>
	Scheduled	Conditional	<p>Work is scheduled.</p> <div>  <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>  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.

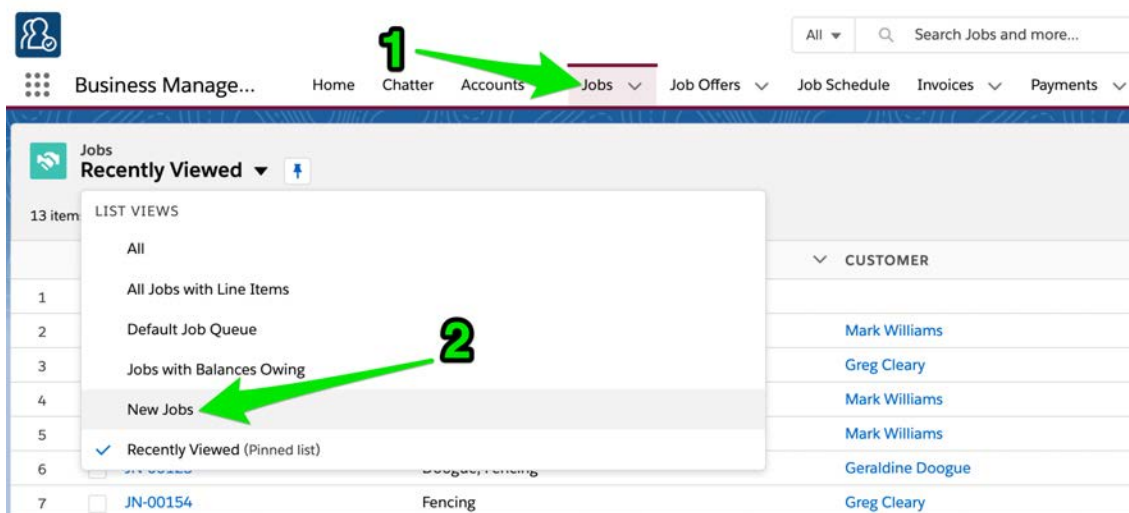
- » When you accept a Job Offer, the Job is assigned to you.
- » You then need to contact the prospect to see if this possible work can be turned into actual work.
- » When a customer contacts you, you need to add the Job to the system yourself.

## How to find newly assigned jobs

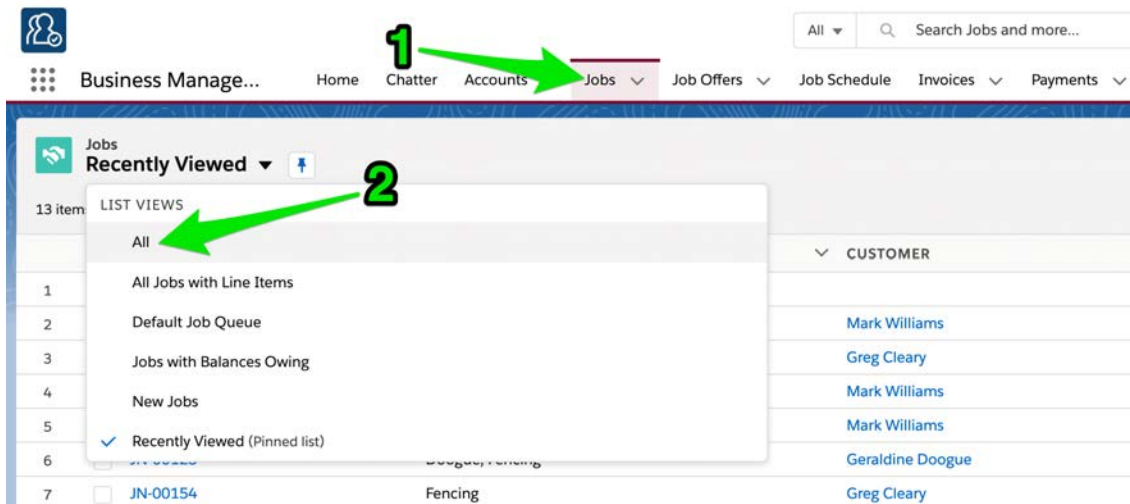
Jobs that have been assigned to you by your franchisor are placed on the **Jobs** tab.

### 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 the 'Business Management' software interface. At the top, there's a navigation bar with various tabs like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, Material Price Lists, Files, Reports, Dashboards, and Calendar. Below this, the 'Job JN-00071' is selected. The job details are shown in a form with tabs for Assigned, Contact, Planning, Work, Invoice, and Closed. The 'Assigned' tab is active. The form has sections for Information, Owner, and Customer. A green arrow points to the 'Edit' button in the top right corner of the job details section. The 'Status' field is set to 'Assigned' and the 'Sub Status' is 'Sub Status Reason'. The 'Owner' field is set to 'Bill Smith'.

The form switches into edit mode.

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

The screenshot shows the 'Job' form for Job JN-00071. The 'Job Name' field is highlighted with a green box and a red '1'. The 'Status' dropdown is set to 'Assigned'. The 'Save' button is highlighted with a green box and a red '2'.

## Reviewing job contact information

### To update Job Contact Information

1. Capture any missing customer details.

The screenshot shows the 'Job' form for Job JN-00071. The 'Job Contact Information' section is highlighted with a green box. The 'First Name', 'Last Name', and 'Company' fields are visible.

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 software interface for job JN-00071. The 'Force Street Address' checkbox is checked, indicated by a green arrow labeled '1'. The 'Street' field contains 'Unit 1, 17 Dudley St', indicated by a green arrow labeled '2'. The 'Save' button is highlighted with a green arrow labeled '3'. Other fields include 'Company', 'Other Phone', 'Supplied Address' (17 Dudley St, Bondi NSW 2026 Australia), 'Geocoded Address' (17 Dudley St, Bondi NSW 2026 Australia (street\_address) ROOFTOP), 'Geo-code Accuracy' (ROOFTOP), 'Location' (Latitude: -33.8960435, Longitude: 151.2707625), 'Territory' (Territory (2) - Bondi), 'Territory Franchise' (This field is calculated upon save), and 'Territory Status' (Unowned, This field is calculated upon save). The 'Save' button is at the bottom right.



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 shows the 'Business Management' software interface. The top navigation bar includes links for 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 form is divided into several sections: 'Unit 1, 17 Dudley St', '17 Dudley St, Bondi NSW 2026, Australia (street\_address) ROOFTOP', 'Suburb: Bondi', 'State: NSW', 'Postcode: 2026', 'Country: Australia', 'Location: Bondi', 'Latitude: -33.8960435', 'Longitude: 151.2707625', 'Territory: Territory (2) - Bondi', 'Territory Franchise: This field is calculated upon save', 'Territory Status: Unowned', 'Job Description: Mow front and back.', 'Request Type: Quote Request', 'Due Date: [empty]', and 'More Information: [empty]'. A green box highlights the 'Job Description' field, and a green arrow points to the 'Save' button at the bottom right.

## 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**.

The screenshot shows the 'Job Management' interface for job JN-00071. The job details include Suburb (Bondi), Next Scheduled Event, Amount Inc Tax (\$0.00), Estimated Hours (0.00), Actual Hours, and Estimated Gross Profit (\$0.00). The 'Match Customer' button is highlighted with a green arrow. The interface also shows tabs for Details, Job Allocation, Quotes/Invoices, Financial Summary, Feedback/Marketing, Files/Notes, and History. The 'Details' tab is active, showing information about the job, customer, and owner.

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



Use the information to determine whether this job should be linked to an existing customer account, 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 section for 'Potentially Matching Contacts' with a table showing contact information. A green arrow points to the 'Geoff' contact. Below this is a 'Customer Details' form with fields for Account Type, First Name, Last Name, Email, Mobile, Other Phone, Street, Suburb, Postcode, Country, and State. A green arrow points to the 'Match' button at the bottom right.

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

The screenshot shows the 'Customer Matching' dialog box. It has a section for 'Potentially Matching Contacts' with a table showing contact information. A green arrow points to the 'New' button at the bottom right.

## 5. The Customer is now added to the Job.

The screenshot displays the 'Business Management' software interface. At the top, there is a navigation bar with various menu items like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, Material Price Lists, Files, Reports, Dashboards, Calendar, and More. Below this, a search bar is present. The main header area shows the job ID 'JN-00071' and several action buttons: '+ Follow', 'Edit', 'Match Customer', 'Plan Job', 'Schedule Job', 'Supplier Invoice', 'Clone', and 'Sharing'. A summary row provides key metrics: Suburb Bonds, Next Scheduled Event, Amount Inc Tax (\$0.00), Estimated Hours (0.00), Actual Hours, and Estimated Gross Profit (\$0.00). Below the summary, a tabbed interface shows the job's status as 'Assigned', with other tabs for Contact, Planning, Work, Invoice, and Closed. A 'Mark Status as Complete' button is also visible. The main content area is divided into two sections. The left section, titled 'Details', includes tabs for Job Allocation, Quotes/Invoices, Financial Summary, Feedback/Marketing, Files/Notes, and History. Under the 'Information' tab, a table lists job details: Job Name (Smith - Mowing), Job Number (JN-00071), Billing Profile, Customer (Geoff Smith), Customer Contact (Geoff Smith), Status (Assigned), Sub Status, Sub Status Reason, and a field for 'If other reasons, please specify'. The 'Customer' field is highlighted with a green box. The right section contains a 'Files (0)' area with an 'Upload Files' button and a 'Notes (0)' area. Below these is an 'Activity' section with tabs for Chatter, Actuals, and SMS, and a filter set to 'All time • All activities • All types'. At the bottom right, an 'Upcoming & Overdue' section indicates 'No activities to show' and provides a tip: 'Get started by sending an email, scheduling a task, and more.'

## 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.

The screenshot shows the 'Job JN-00011' page. The 'Details' tab is active, and the 'Information' section is expanded. The 'Customer Contact' field is highlighted with a green arrow and contains the name 'Richard Davis'. Other fields include 'Job Name' (Painting), 'Job Number' (JN-00011), 'Billing Profile', 'Customer' (Parallel Trades Pty Ltd), 'Franchise' (ECS - Bondi), and 'Territory Category'. The 'Status' is 'Planning' and 'Sub Status' is 'Completed'. The 'Owner' is 'James Walker'.

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

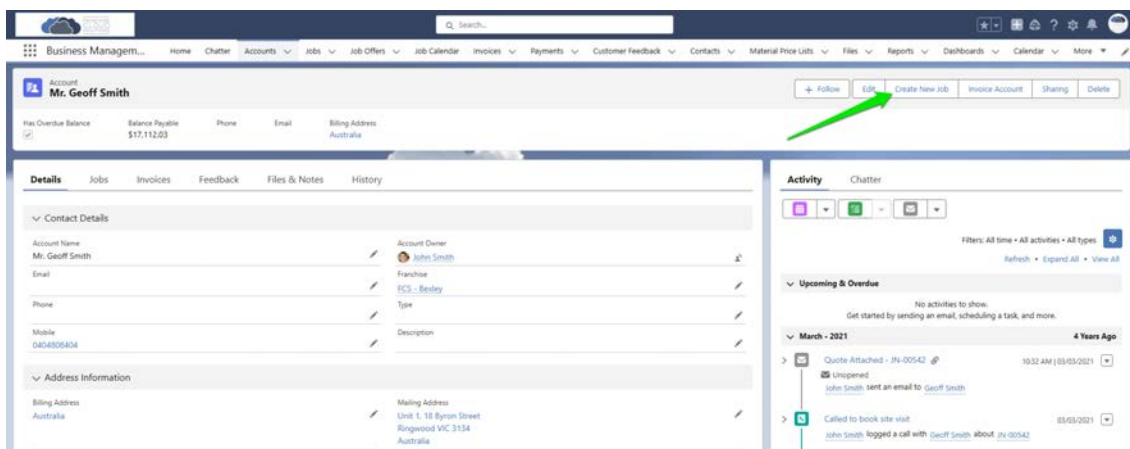
The screenshot shows the 'Account Mr. Geoff Smith' page. The 'Jobs' tab is active, and the 'Marketing & Tracking' section is highlighted with a green box. This section contains the following fields: 'Last Job Date' (12/01/2023), 'Email Opt Out' (checked), 'Do Not Call' (unchecked), 'Quote Auto Follow Up' (unchecked), and 'Preferred Communication Channel' (SMS). The 'Jobs (10+)' section at the bottom shows a list of jobs, with the first job being 'Quote Attached - JN-00542'.

## 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.

**Create New Job**

Customer Geoff Smith	Franchise FCS - Bexley
First Name Geoff	* Status Assigned
Last Name Smith	Street Unit 1, 18 Byron Street
Company	Suburb Ringwood
Email gsmith@gmail.com	Postcode 3134
Mobile 0404808404	Country Australia
Other Phone	State VIC
Job Description	
More information	
<button>Cancel</button> <button>Save</button>	

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

Search...

Account: Mr. Geoff Smith

Has Overdue Balance: No

Balance Payable: \$17,112.03

Phone:

Email:

Billing Address: Australia

Job: Job "JN-00637" was created.

Follow Edit Create New Job Invoice Account Sharing Delete

Details Jobs Invoices Feedback Files & Notes History

Contact Details

Account Name: Mr. Geoff Smith

Email:

Phone:

Mobile: 0404808404

Account Owner: John Smith

Franchise: FCS - Bexley

Type:

Description:

Billing Address: Australia

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

Activity Chatter

Filter: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

March - 2021 4 Years Ago

Quote Attached - JN-00542 10:32 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

## 7. Edit the Job Name and press **Save**.

The screenshot shows the 'Job' details page for '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. The interface includes a top navigation bar with various tabs 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 is divided into sections for 'Information', 'Status', 'Sub Status', 'Sub Status Reason', 'Customer', and 'Customer Contact'. The 'Status' is set to 'Assigned', 'Sub Status' is 'None', and 'Sub Status Reason' is 'None'. The 'Customer' is 'Geoff Smith' and the 'Customer Contact' is 'Search Contacts...'. The 'Save' button is located 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 'Job' details page for '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. The interface includes a top navigation bar with various tabs 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 is divided into sections for 'Information', 'Status', 'Sub Status', 'Sub Status Reason', 'Customer', and 'Customer Contact'. The 'Status' is set to 'Planning', 'Sub Status' is 'Completed', and 'Sub Status Reason' is 'None'. The 'Customer' is 'Parallel Trades Pty Ltd' and the 'Customer Contact' is 'Richard Davis'. The 'Owner' is 'James Walker' and the 'Job Accepted Notification Sent' is 'No'. The 'Save' button is located 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.

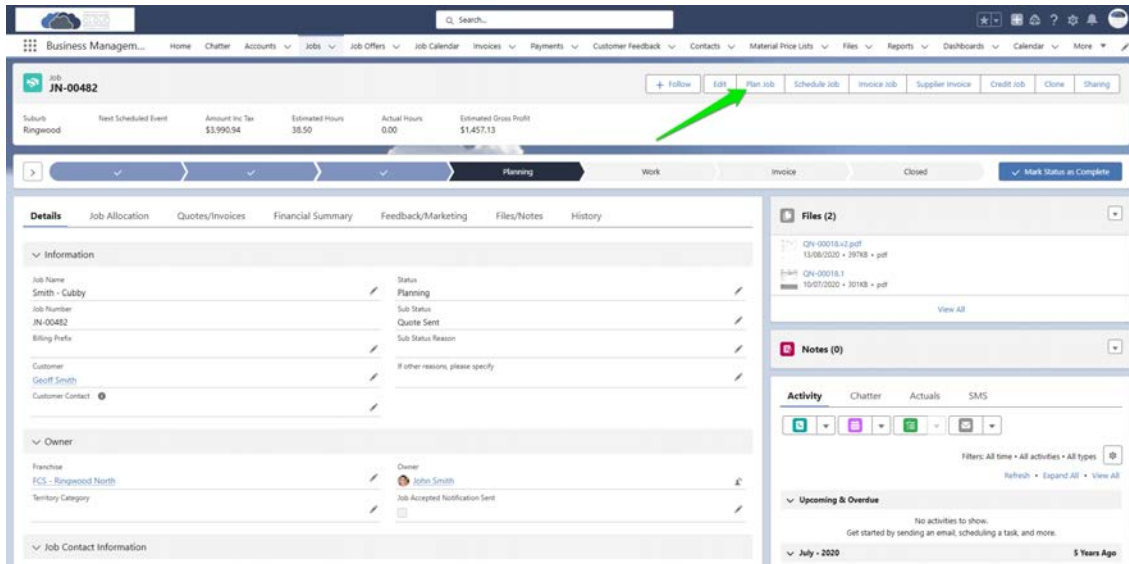


# Job planning and estimation

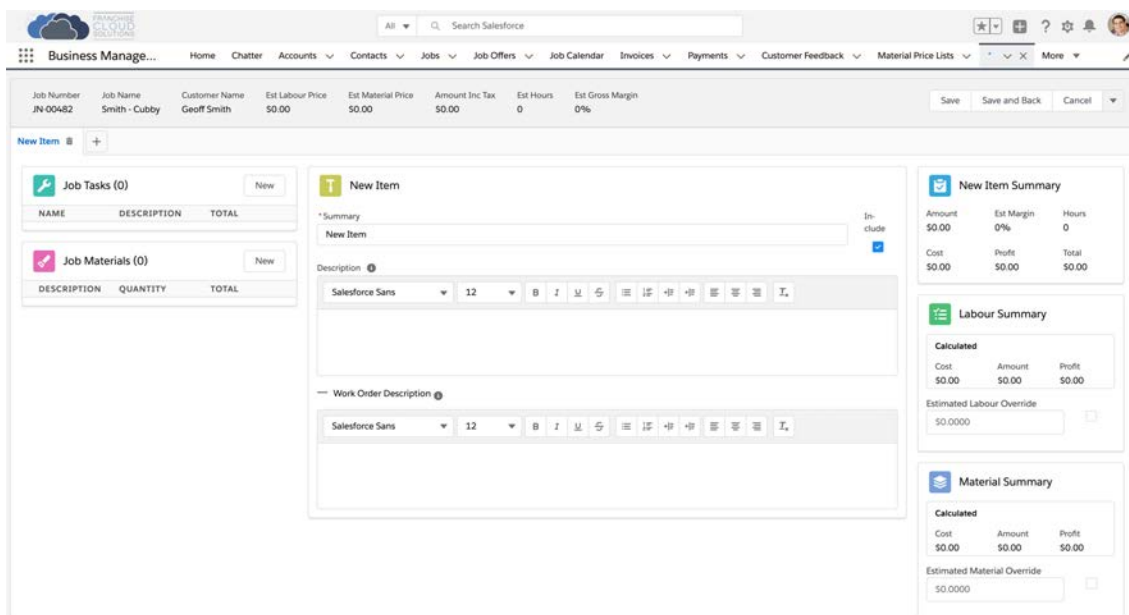
Business Management makes it easy to collect all the relevant information necessary to plan, estimate and schedule a job.

## To start job planning

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




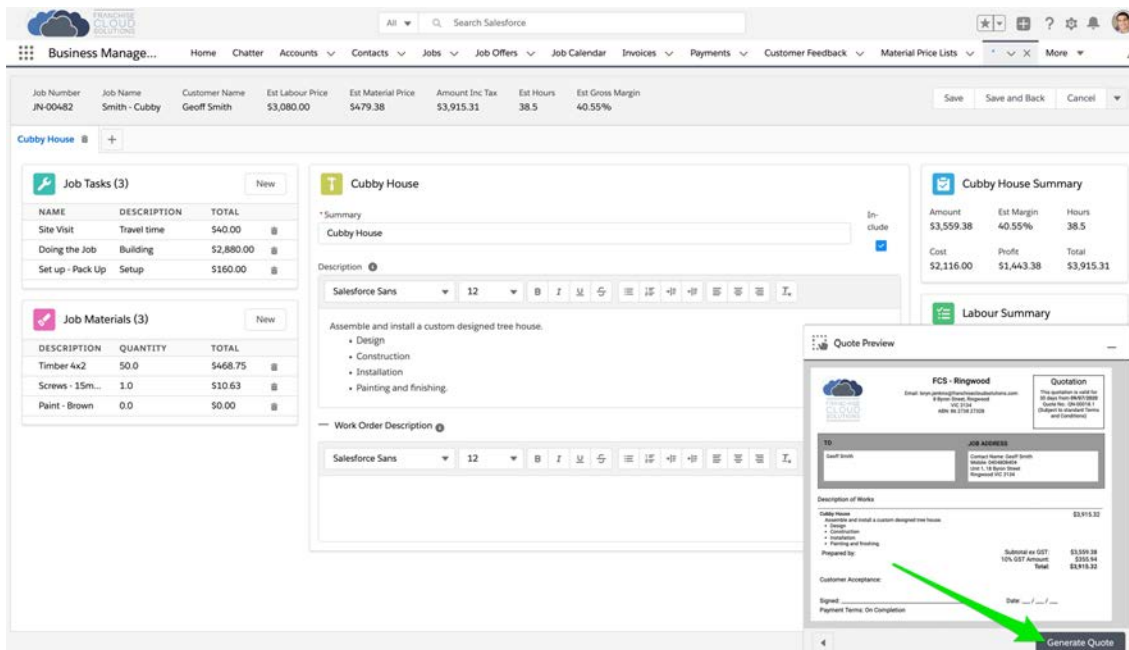
2. The Job Planning page appears.



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 'Business Manager' software interface. The main window displays job details for 'Cubby House' (Job Number: JN-00482, Customer: Geoff Smith). It includes sections for 'Job Tasks (3)', 'Job Materials (3)', and 'Cubby House Summary'. A 'Quote Preview' window is open, showing a summary of the job and a list of materials. A green arrow points to the 'Generate Quote' button at the bottom right of the 'Quote Preview' window.

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

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 displays the 'Business Management' software interface. At the top, there's a navigation bar with tabs 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 (\$479.38), Amount Inc Tax (\$3,915.31), Est Hours (38.5), and Est Gross Margin (40.55%). To the right of these details are buttons for 'Save', 'Save and Back', and 'Cancel'. A green arrow points to the 'Save and Back' button.

The main content area is divided into several sections:

- Job Tasks (3)**: A table with columns NAME, DESCRIPTION, and TOTAL. It lists 'Site Visit' (Travel time, \$40.00), 'Doing the Job' (Building, \$2,880.00), and 'Set up - Pack Up' (Setup, \$160.00).
- Job Materials (3)**: A table with columns DESCRIPTION, QUANTITY, and TOTAL. It lists 'Timber 4x2' (50.0, \$468.75), 'Screws - 15m...' (1.0, \$10.63), and 'Paint - Brown' (0.0, \$0.00).
- Cubby House**: A section for adding a new job. It includes a 'Summary' section with a text input for 'Cubby House' and an 'Include' checkbox. Below this is a 'Description' section with a rich text editor containing the text 'Assemble and install a custom designed tree house.' and a list of tasks: 'Design', 'Construction', 'Installation', and 'Painting and finishing.'.
- Cubby House Summary**: A summary table showing 'Amount' (\$3,559.38), 'Est Margin' (40.55%), and 'Hours' (38.5). It also shows 'Cost' (\$2,116.00), 'Profit' (\$1,443.38), and 'Total' (\$3,915.31).
- Labour Summary**: A section 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 section 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.

At the bottom right, there is a 'Quote Preview' 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.

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

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%

**Summary 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

Cubby House

Description

Salesforce Sans 12

Assemble and install a custom designed tree house.

- Design
- Construction
- Installation
- Painting and finishing.

Work Order Description

Salesforce Sans 12

**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

## Detail lines

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

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

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%

**Another detail line**

Cubby House Fence Painting +

**Detail line**

**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

Cubby House

Description

Salesforce Sans 12

Assemble and install a custom designed tree house.

- Design
- Construction
- Installation
- Painting and finishing.

Work Order Description

Salesforce Sans 12

**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

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.

**remove detail line** **add detail line**

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%

**Cubby House Summary**

Amount	Est Margin	Hours
\$3,559.38	40.55%	38.5

**Labour Summary**

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

**Material Summary**

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

You can see the profitability summary for each Detail Line.

**Detail Line Summary**

**Cubby House Summary**

Amount	Est Margin	Hours
\$3,559.38	40.55%	38.5

**Labour Summary**

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

**Material Summary**

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

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.

**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
\$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

**Price overrides**



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.

**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

**Cubby House - Doing the Job**

Task Type	Task Description	Estimated Hours	Estimated Hourly Cost	Hourly Rate	Total
Doing the Job	Building	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



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...**

**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 - Doing the Job**

Task Type: Doing the Job Task Description: Building

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

**Cubby House Summary**

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

**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

Description: Assemble and install a custom designed tree house.

- Design
- Construction
- Installation
- Painting and finishing.

Work Order Description

Summary

**Cubby House Summary**

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

## 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 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 - 15mm...	1.0	\$10.63
Paint - Brown	0.0	\$0.00

**Cubby House - Timber 4x2 - Timber 4x2**

Material Description: Timber 4x2

Enter material description, size or product name to search

In Stock: ☐ Supplier: Burnings Quantity: 50 Material Cost: \$7.50 Sub Total: \$375.00

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

**Cubby House Summary**

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

Business Manager...

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  
Danielle Anderson

Est Labour Price  
\$1,330.00

Est Material Price  
\$537.50

Amount Inc Tax  
\$2,054.25

Est Hours  
13.30

Est Gross Margin  
46.37%

Fencing

+

Job Tasks (3)
New

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

Job Materials (2)
New

DESCRIPTION	QUANTITY	TOTAL
Pickets	150.0	\$337.50
Fence posts	12.0	\$200.00

Fencing

Summary

Fencing

In-clude

Description

Salesforce Sans
12
B
I
U

Fence three sides of house lot.

Work Order Description

Salesforce Sans
12
B
I
U

Fencing Summary

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

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

Labour Summary

Calculated

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

Estimated Labour Override

Enter a value

Material Summary

Calculated

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

Estimated Material Override

Enter a value

## 2. The New Item appears.

Business Manager... 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: Danielle Anderson Est Labour Price: \$1,330.00 Est Material Price: \$537.50 Amount Inc Tax: \$2,054.25 Est Hours: 13.30 Est Gross Margin: 46.37%

Fencing > < New Item +

**Job Tasks (0)** New

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

**Job Materials (0)** New

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

**New Item**

\* Summary New Item Include

Description

Salesforce Sans 12 B I U

Work Order Description

Salesforce Sans 12 B I U

**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

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

Business Manager... 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: Danielle Anderson Est Labour Price: \$1,330.00 Est Material Price: \$537.50 Amount Inc Tax: \$2,054.25 Est Hours: 13.30 Est Gross Margin: 46.37%

Fencing > < Painting +

**Job Tasks (0)** New

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

**Job Materials (0)** New

DESCRIPTION	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

#### 4. Remember to **Save**.

The screenshot shows the 'Business Management' software interface. At the top, there's a navigation bar with 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 the job ID 'JN-00144' and a summary of 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%). A green arrow points to a red 'Save' button in the top right corner of the job entry form. The main area is divided into sections: 'Job Tasks (0)' and 'Job Materials (0)' on the left; a central 'Painting' section with a 'Summary' tab and a 'Description' field containing 'Salesforce Sans' and 'Paint fence in Dulux "Flooded Gum" grey.'; and three summary boxes on the right: 'Painting Summary', 'Labour Summary', and 'Material Summary'. Each summary box shows calculated values for Cost, Amount, and Profit.



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 the 'Business Manager' interface for job 'JN-00145'. At the top, a navigation bar includes links for Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and More. Below this, a summary bar shows customer details (Danielle Anderson), estimated labour price (\$800.00), estimated material price (\$336.00), amount including tax (\$1,249.60), estimated hours (8.00), and estimated gross margin (43.75%).

The main workspace is divided into several sections:

- Job Tasks (3):** A table listing tasks with columns for NAME, DESCRIPTION, and TOTAL. Tasks include 'Remove broke...', 'Retile', and 'Scaffolding ass...'.
- Job Materials (1):** A table listing materials with columns for DESCRIPTION, QUANTITY, and TOTAL. It shows 'High quality...' with a quantity of 3.0 and a total of \$336.00.
- Tiling Summary:** A summary table for the 'Tiling' task, showing Amount (\$1,136.00), Est Margin (33.98%), Hours (8), Cost (\$750.00), Profit (\$386.00), and Total (\$1,249.60).
- Labour Summary:** A section showing calculated values: Cost (\$450.00), Amount (\$800.00), and Profit (\$350.00). It also includes an 'Estimated Labour Override' field.
- Material Summary:** A section showing calculated values: Cost (\$300.00), Amount (\$336.00), and Profit (\$36.00). It also includes an 'Estimated Material Override' field.

The 'Tiling' task details are expanded, showing a description of 'Retiling damaged section of the roof' and a work order description.

2. 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' software interface for a job entry. At the top, there's a navigation bar with 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', and 'More'. Below this, a header bar displays 'JN-00145' and buttons for 'Save', 'Save and Back', 'Invoice Job', and 'Cancel'. A summary bar shows 'Customer Name: Danielle Anderson', 'Est Labour Price: \$800.00', 'Est Material Price: \$390.00' (highlighted with a green box), 'Amount Inc Tax: \$1,309.00', 'Est Hours: 8.00', and 'Est Gross Margin: 43.75%'. The main content area is titled 'Tiling' and includes a 'Job Tasks (3)' table, a 'Job Materials (1)' table, and a 'Tiling' section with a 'Summary' and 'Description' field. The 'Description' field contains 'Retiling damaged section of the roof.' and 'Work Order Description'. To the right, there are three summary sections: 'Tiling Summary', 'Labour Summary', and 'Material Summary'. The 'Material Summary' section has a 'Calculated' table and an 'Estimated Material Override' field with the value '\$390.00' (indicated by a green arrow from the 'Est Material Price' field).

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

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

Amount	Est Margin	Hours
\$1,190.00	36.97%	8

Cost	Profit	Total
\$750.00	\$440.00	\$1,309.00

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

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



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

1. From the **Job Tasks** section, press **New**.

A new Job Task line item displays.

CXXXIX

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.

The screenshot shows the 'Business Manager' 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 'More'. Below this, a header bar displays 'JN-00145' and buttons for 'Save', 'Save and Back', 'Invoice Job', and 'Cancel'. A summary bar shows '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 form is titled 'New Item' and contains several sections: 'Job Tasks (4)' with a table listing tasks like 'Remove broke...', 'Retail', 'Travel', and 'Scaffolding ass...'; 'Job Materials (0)' with an empty table; '- Set up - Pack Up' section with fields for 'Task Type', 'Task Description', 'Estimated Hours', 'Estimated Hourly Cost', 'Hourly Rate', and 'Total'; and three summary boxes: 'Summary', 'Labour Summary', and 'Material Summary'. The 'Summary' box shows 'Amount: \$850.00', 'Est Margin: 43.82%', and 'Hours: 8.5'. The 'Labour Summary' box shows 'Calculated' values for 'Cost: \$477.50', 'Amount: \$850.00', and 'Profit: \$372.50'. The 'Material Summary' box shows 'Calculated' values for 'Cost: \$0.00', 'Amount: \$0.00', and 'Profit: \$0.00'.



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 xlvii.



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. At the top, there's a navigation bar with options like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and More. Below this, a header section displays job details for 'JN-00145', including 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 section is titled 'New Item' and contains three primary components:

- Job Tasks (4):** A table listing job tasks. A green arrow points to the 'Set up - Pack Up' task line. The table has columns for NAME, DESCRIPTION, and TOTAL.
- Set up - Pack Up:** A detailed view of the selected task. It includes a Task Type dropdown (Set up - Pack Up), a Task Description field (Scaffolding assembly and disassembly), and a table for Estimated Hours, Estimated Hourly Cost, Hourly Rate, and Total.
- Summary:** A panel showing calculated values for Amount, Est Margin, Hours, Cost, Profit, and Total.
- Labour Summary:** A panel showing calculated values for Cost, Amount, and Profit, along with an Estimated Labour Override field.
- Material Summary:** A panel showing calculated values for Cost, Amount, and Profit, along with an Estimated Material Override field.

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

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

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 'Job Materials' section is active, showing a list of materials with a 'New' button highlighted by a green arrow. The interface includes various summary panels on the right, such as 'Tiling Summary', 'Labour Summary', and 'Material Summary', which provide calculated costs, amounts, and profits for the job.

NAME	DESCRIPTION	TOTAL
Doing the job	Remove broken tiles	\$200.00
Doing the job	Retile	\$400.00

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

**Job Materials (2)** [New]

**Tiling - High quality terracotta tiles - black.** [New Material]

Material Description: High quality terracotta tiles - black.

Material Cost: \$35.00, Sub Total: \$110.00, Markup(%): 22.727272727272727

Unit Sell Price: \$67.50, Sell Price: \$135.00

**Tiling Summary**

Amount	Est Margin	Hours
\$759.00	82.87%	7

**Labour Summary**

Calculated	Cost	Amount	Profit
	\$0.00	\$600.00	\$600.00

**Material Summary**

Calculated	Cost	Amount	Profit
	\$130.00	\$155.00	\$25.00

- 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.

The screenshot shows the 'Business Management' software interface. The top navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', 'Material Price Lists', 'Files', 'Reports', 'Dashboards', 'Calendar', and 'More'. The main content area is titled 'Tiling' and features a 'Job Tasks (2)' table, a 'Job Materials (3)' table, and a 'Tiling' material selection form. The 'Tiling' form has a 'Material' search field with a green arrow labeled '1' pointing to it. Below the search field is a list of search results, with a green arrow labeled '2' pointing to the first result: 'MNV-00016 Tip Fee - Mixed Waste - per Kg'. The 'Tiling Summary' panel on the right shows calculated values for Amount, Est Margin, and Hours.

NAME	DESCRIPTION	TOTAL
Doing the job	Remove broken tiles	\$200.00
Doing the job	Refill	\$400.00

DESCRIPTION	QUANTITY	TOTAL
Grout Skg	1.0	\$24.00
High quality terrac...	2.0	\$135.00
	0.0	

Material	Material Description	Material Cost	Sub Total	Markup(%)	Unit Sell Price	Sell Price
MNV-00016 Tip Fee - Mixed Waste - per Kg		\$0.00	\$0.00	10	\$0.00	\$0.00

Tiling Summary		
Amount	Est Margin	Hours
\$759.00	82.87%	6
Cost	Profit	Total
\$130.00	\$629.00	\$804.90

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

The screenshot shows the 'Business Management' software interface. The top navigation bar is the same as the previous screenshot. The main content area is titled 'Tiling' and features a 'Job Tasks (2)' table, a 'Job Materials (3)' table, and a 'Tiling' material selection form. The 'Tiling' form has a 'Material' search field with a green arrow pointing to it. Below the search field is a list of search results, with a green arrow pointing to the first result: 'MNV-00016 Tip Fee - Mixed Waste - per Kg'. The 'Tiling' form has a 'Quantity' field with a green arrow pointing to it. The 'Tiling Summary' panel on the right shows calculated values for Amount, Est Margin, and Hours.

NAME	DESCRIPTION	TOTAL
Doing the job	Remove broken tiles	\$200.00
Doing the job	Refill	\$400.00

DESCRIPTION	QUANTITY	TOTAL
Grout Skg	1.0	\$24.00
High quality terrac...	2.0	\$135.00
Tip Fee - Mixed Wa...	15.0	\$7.50

Material	Material Description	Material Cost	Sub Total	Markup(%)	Unit Sell Price	Sell Price
MNV-00016 Tip Fee - Mixed Waste - per Kg	Tip Fee - Mixed Waste - per Kg	\$0.35	\$5.25	42.857142857142854	\$0.50	\$7.50

Tiling Summary		
Amount	Est Margin	Hours
\$766.50	82.35%	6
Cost	Profit	Total
\$135.25	\$631.25	\$846.15

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

The screenshot shows the 'Business Management' software interface for job 'JN 00425'. The 'Tiling' section is active, showing a list of job tasks and materials. A green arrow points to the 'Sell Price' field, which is set to \$15.00. The 'Tiling Summary' and 'Labour Summary' sections are also visible.

NAME	DESCRIPTION	TOTAL
Doing the job	Remove broken tiles	\$200.00
Doing the job	Retile	\$400.00

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

Material	Material Description	Material Cost	Sub Total	Markup(%)
MN-00016 Tip Fee - Mixed Waste - per Kg	Tip Fee - Mixed Waste - per Kg	\$0.35	\$5.25	185.71428571428572

Unit Sell Price	Sell Price
\$0.50	\$15.00

Amount	Est Margin	Hours
\$174.00	82.53%	6
Cost	Profit	Total
\$135.25	\$638.75	\$851.40

Cost	Amount	Profit
\$0.00	\$600.00	\$600.00

Cost	Amount	Profit
\$135.25	\$174.00	\$338.75

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

The screenshot shows the 'Business Management' software interface for job 'JN 00425'. The 'Tiling' section is active, showing a list of job tasks and materials. A green arrow points to the 'Save' button in the top right corner. The 'Tiling Summary' and 'Labour Summary' sections are also visible.

NAME	DESCRIPTION	TOTAL
Doing the job	Remove broken tiles	\$200.00
Doing the job	Retile	\$400.00

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

Material	Material Description	Material Cost	Sub Total	Markup(%)
MN-00016 Tip Fee - Mixed Waste - per Kg	Tip Fee - Mixed Waste - per Kg	\$0.35	\$5.25	185.71428571428572

Unit Sell Price	Sell Price
\$0.50	\$15.00

Amount	Est Margin	Hours
\$174.00	82.53%	6
Cost	Profit	Total
\$135.25	\$638.75	\$851.40

Cost	Amount	Profit
\$0.00	\$600.00	\$600.00

Cost	Amount	Profit
\$135.25	\$174.00	\$338.75



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 'Business Management' software interface. At the top, there's a navigation bar with various menu items. Below it, a header section displays job details for 'JN 00425', including Customer Name (Jill Glover), Estimated Labour Price (\$600.00), Estimated Material Price (\$174.00), Amount Inc Tax (\$851.40), Estimated Gross Margin (82.53%), Estimated Hours (6.00), and Actual Hours. The main area is divided into several sections. On the left, there's a 'Job Tasks (2)' section with a table showing tasks like 'Remove broken tiles' and 'Rettle'. Below it is the 'Job Materials (3)' section, which is highlighted with a green box. A green arrow points to the 'New' button in the 'Job Materials' section. The 'Job Materials' table lists items like 'Grout 5kg', 'High quality terrac...', and 'Tip Fee - Mixed Wa...'. To the right of the 'Job Materials' section is the 'Tiling' section, which contains a 'Summary' field, a 'Line Description' field, and a 'Work Order Description' field. Further right are summary sections for 'Tiling Summary', 'Labour Summary', and 'Material Summary', each showing calculated costs, amounts, and profits.

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

This screenshot shows the 'New Material' form within the 'Business Management' software. The 'Job Materials' section now shows 4 items, including 'Other consumables'. The 'New Material' form is highlighted with a green box. It contains fields for 'Material Description' (with a search bar), 'Material Cost' (\$30.00), 'Sub Total' (\$90.00), 'Markup(%)' (25), 'Unit Sell Price' (\$3.00), and 'Sell Price' (\$112.50). The 'In Stock' checkbox is checked. The 'Supplier' field is set to 'Burnings'. The 'Quantity' field is set to 3. The 'Material Description' field is set to 'Other consumables'. The 'Tiling Summary', 'Labour Summary', and 'Material Summary' sections are also visible, showing updated calculated values.

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

The screenshot shows the 'Business Management' software interface. At the top, there's a navigation bar with 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 this, a header bar displays job details for 'JN 00425', including Customer Name (Jill Grover), Est Labour Price (\$600.00), Est Material Price (\$286.50), Amount Inc Tax (\$975.15), Est Gross Margin (82.53%), Est Hours (6.00), and Actual Hours. A green arrow points to a red 'Save' button in the top right corner of the form. The main area is divided into several sections: 'Job Tasks (2)' with a table showing tasks like 'Remove broken tiles' and 'Rattle'; 'Job Materials (4)' with a table showing materials like 'Grout 5kg', 'High quality terrac...', and 'Tip Fee - Mixed Wa...'; 'Tiling - Other consumables' with a form for adding materials, including fields for Material Description, Material Cost, Sub Total, Markup(%), and Unit Sell Price; 'Tiling Summary' with a table showing Amount (\$886.50), Est Margin (74.59%), and Hours (6); 'Labour Summary' with a table showing Cost (\$0.00), Amount (\$600.00), and Profit (\$600.00); and 'Material Summary' with a table showing Cost (\$225.25), Amount (\$286.50), and Profit (\$61.25). At the bottom right, there's a 'Quote Preview' button.



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.

The screenshot shows the 'Business Manager' interface with a search bar at the top. The main area is divided into several sections: 'Job Tasks (2)', 'Job Materials (2)', and a central 'Tiling' section. The 'Tiling' section contains a search bar with 'Terracotta tiles' entered, a 'No matches found' message, and a 'New Material' button. A green arrow points to the 'New Material' button. To the right of the search area are summary boxes for 'Summary', 'Labour Summary', and 'Material Summary', each showing calculated costs, amounts, and profits.

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

This screenshot is identical to the one above, showing the 'Business Manager' interface with the 'Tiling' job task. A green arrow points to the 'New Material' button in the top right corner of the material search area.

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.

**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.

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

**JN 00425** | Save | Save and Back | Invoice Job | Cancel

Customer Name: Jill Glover | Est Labour Price: \$600.00 | Est Material Price: \$155.00 | Amount Inc Tax: \$834.90 | Est Gross Margin: 0% | Est Hours: 7.00 | Actual Hours:

**Tiling** | Job Tasks (2) | Job Materials (2) | Tiling - High quality terracotta tiles - black. | Tiling Summary | Labour Summary | Material Summary

**Job Tasks (2)**

NAME	DESCRIPTION	TOTAL
Doing the Job	Remove broken tiles	\$200.00
Doing the Job	Retile	\$400.00

**Job Materials (2)**

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

**Tiling - High quality terracotta tiles - black.**

Material: High quality terracotta tiles - black.

Material Description: High quality terracotta tiles - black.

Material Cost: \$55.00 | Sub Total: \$110.00 | Margin(%): 22.71272727272727

Unit Sell Price: \$67.50 | Sell Price: \$135.00

**Tiling Summary**

Amount	Est Margin	Hours
\$759.00	82.87%	7
Cost	Profit	Total
\$130.00	\$629.00	\$859.00

**Labour Summary**

Calculated

Cost	Amount	Profit
\$0.00	\$600.00	\$600.00

Estimated Labour Override: Enter a value

**Material Summary**

Calculated

Cost	Amount	Profit
\$130.00	\$155.00	\$29.00

Estimated Material Override: Enter a value

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

The screenshot shows a software interface for job planning and estimation. At the top, there is a navigation bar with 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 bar, there is a header section for 'JN 00425' with a green arrow pointing to a red 'Save' button. The main content area is divided into several sections: 'Job Tasks (2)' with a table showing tasks like 'Remove broken tiles' and 'Rattle'; 'Job Materials (2)' with a table showing materials like 'Grout 5kg' and 'High quality terracotta tiles'; 'Tiling - High quality terracotta tiles - black.' with a form for material details; and summary sections for 'Tiling Summary', 'Labour Summary', and 'Material Summary'.

NAME	DESCRIPTION	TOTAL
Doing the job	Remove broken tiles	\$200.00
Doing the job	Rattle	\$400.00

DESCRIPTION	QUANTITY	TOTAL
Grout 5kg	1.0	\$24.00
High quality terracotta tiles	2.0	\$135.00

Material	Material Description	Material Cost	Sub Total	Markup(%)	Unit Sell Price	Sell Price
High quality terracotta tiles - black.	High quality terracotta tiles - black.	\$55.00	\$110.00	22.727272727272727	\$67.50	\$135.00

Amount	Est Margin	Hours
\$758.00	82.87%	7

Cost	Profit	Total
\$130.00	\$629.00	\$834.90

Cost	Amount	Profit
\$0.00	\$600.00	\$600.00

Cost	Amount	Profit
\$130.00	\$159.00	\$29.00

## 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.

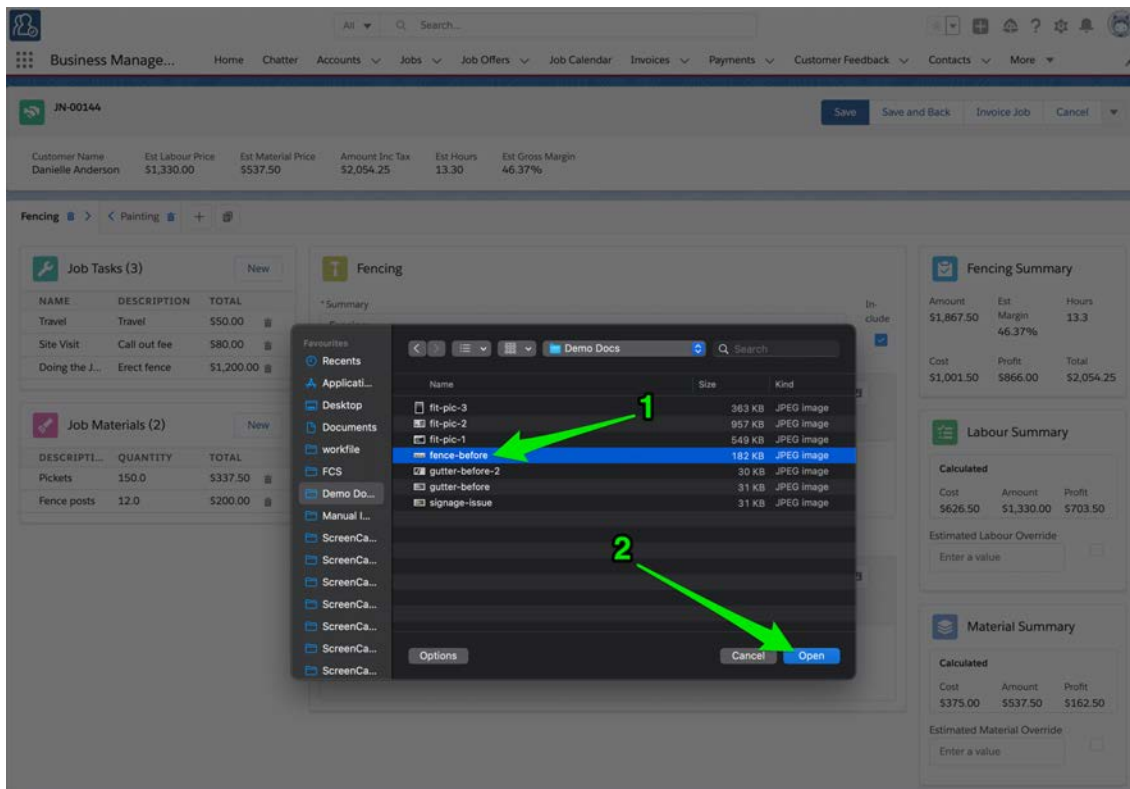
The screenshot shows the 'Business Management' software interface. The top navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', and 'More'. The main header displays 'JN-00145' and buttons for 'Save', 'Save and Back', 'Invoice Job', and 'Cancel'. Below the header, a summary row shows: 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 'Fencing' job task is selected, showing a 'Summary' section with 'Fencing' as the description. The 'Description' field is highlighted with a red box. The 'Image' button in the toolbar is highlighted with a red arrow. The 'Job Tasks (3)' section lists: Travel (\$50.00), Site Visit (\$80.00), and Doing the J... Erect fence (\$1,200.00). The 'Job Materials (2)' section lists: Pickets (150.0, \$337.50) and Fence posts (12.0, \$200.00). The 'Fencing Summary' section shows: Amount \$1,867.50, Est Margin 46.37%, Hours 13.3, Cost \$1,001.50, Profit \$866.00, and Total \$2,054.25. The 'Labour Summary' section shows: Calculated Cost \$626.50, Amount \$1,330.00, Profit \$703.50. The 'Material Summary' section shows: Calculated Cost \$375.00, Amount \$537.50, Profit \$162.50.

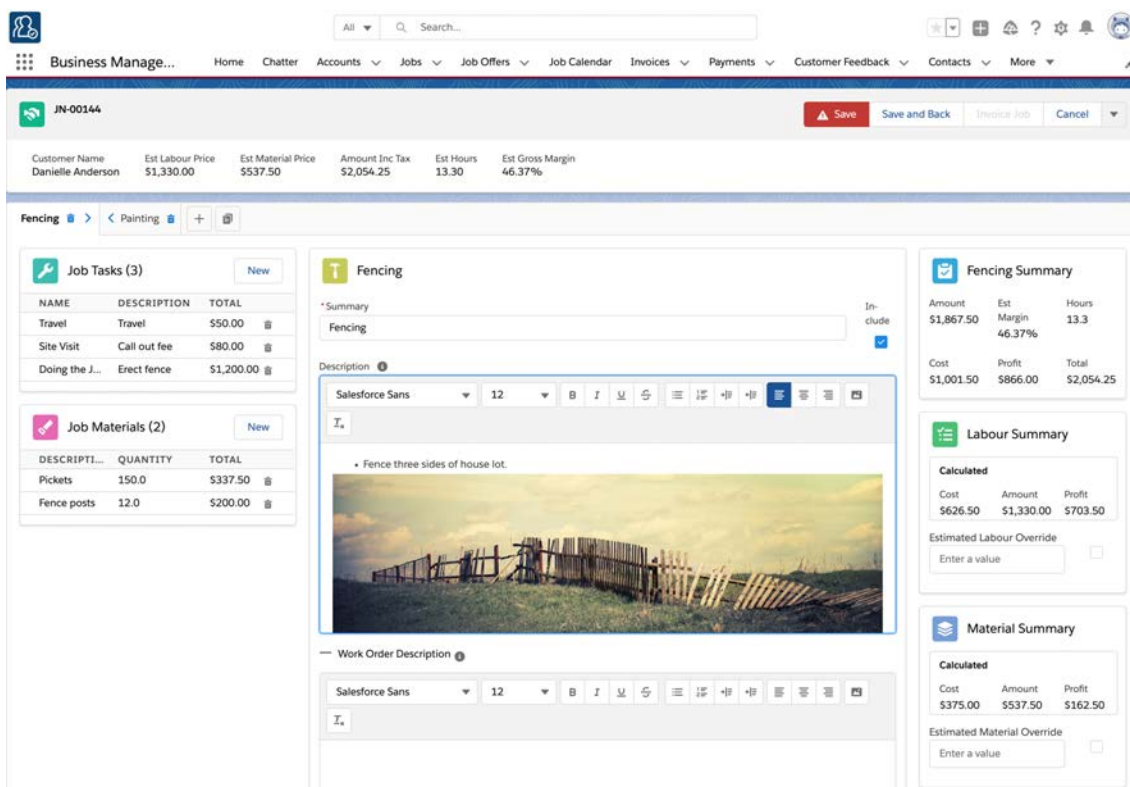
2. Press the image button.

This screenshot is identical to the one above, but with a red arrow pointing to the 'Image' button in the toolbar of the 'Description' field.

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.



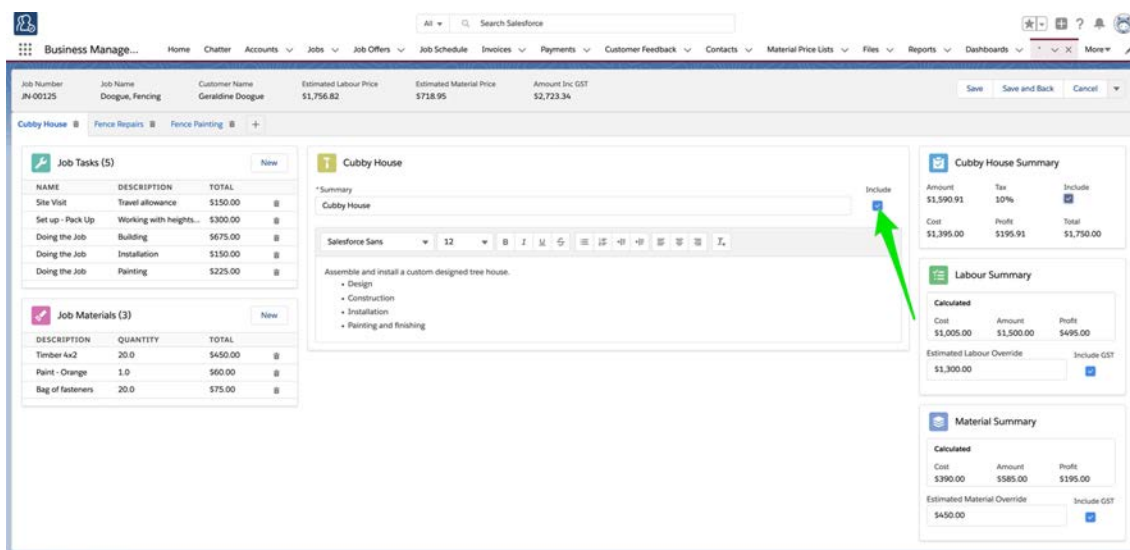
This is useful to allow:

- » 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 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.

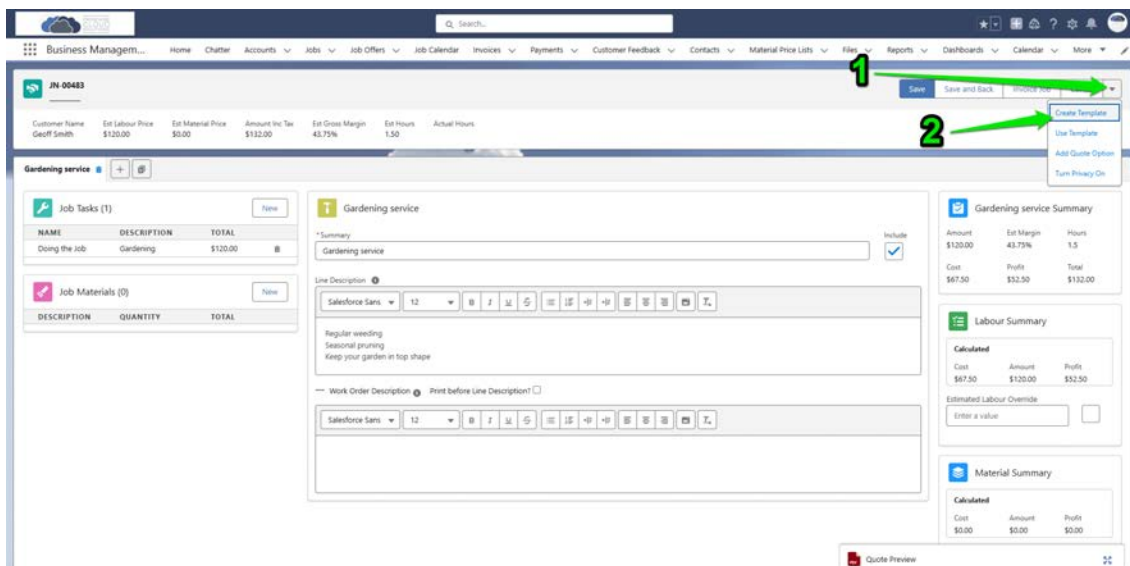
You reuse job plans by

- » 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 'More' dropdown menu is open, showing options: 'Save', 'Save and Back', 'Archive Job', 'Create Template', 'Use Template', 'Add Quote Option', and 'Turn Privacy On'. A green arrow labeled '1' points to the 'Save' button, and a green arrow labeled '2' points to the 'Create Template' option.

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.

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

Job JN-00645

Suburb: Ringwood Next Scheduled Event: Amount Inc Tax: \$132.00 Estimated Hours: 1.50 Actual Hours: Estimated Gross Profit: \$52.50

Follow Edit Plan Job Schedule Job Invoice Job Supplier Invoice Clone Sharing

Details Job Allocation Quotes/Invoices Financial Summary Feedback/Marketing Files/Notes History

Information

Job Name: Gardening Package - Summer 2025 Status: Closed

Job Number: JN-00645 Sub Status: Template

Billing Profile: Sub Status Reason

Customer: Ringwood If other reasons, please specify

Customer Contact: Mark Status as Complete

Files (0)

Notes (0)

Activity Chatter Actuals SMS

## To use a job template

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

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

Job JN-00646

Suburb: Ringwood Next Scheduled Event: Amount Inc Tax: \$0.00 Estimated Hours: 0.00 Actual Hours: Estimated Gross Profit: \$0.00

Follow Edit Plan Job Schedule Job Invoice Job Supplier Invoice Clone Sharing

Details Job Allocation Quotes/Invoices Financial Summary Feedback/Marketing Files/Notes History

Information

Job Name: Grover - Gardening Status: Planning

Job Number: JN-00646 Sub Status: Template

Billing Profile: Sub Status Reason

Customer: Jill Grover If other reasons, please specify

Customer Contact: Mark Status as Complete

Files (0)

Notes (0)

Activity Chatter Actuals SMS

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

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

Job JN-00646 Grover - Gardening

Customer Name: Jill Grover Est Labour Price: \$0.00 Est Material Price: \$0.00 Amount Inc Tax: \$0.00 Est Gross Margin: 0% Est Hours: 0.00 Actual Hours:

Save Save and Back Print Job Plan

Create Template Use Template Add Quote Option Turn Privacy On

New Item

Job Tasks (0)

Job Materials (0)

Summary

Amount: \$0.00 Est Margin: 0% Hours: 0

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

Labour Summary

Calculated

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

Estimated Labour Override

Material Summary

Calculated

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

Estimated Material Override



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

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

Cost	Profit	Total
\$67.50	\$52.50	\$120.00

Labour Summary

Calculated

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

Estimated Labour Override

Enter a value

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

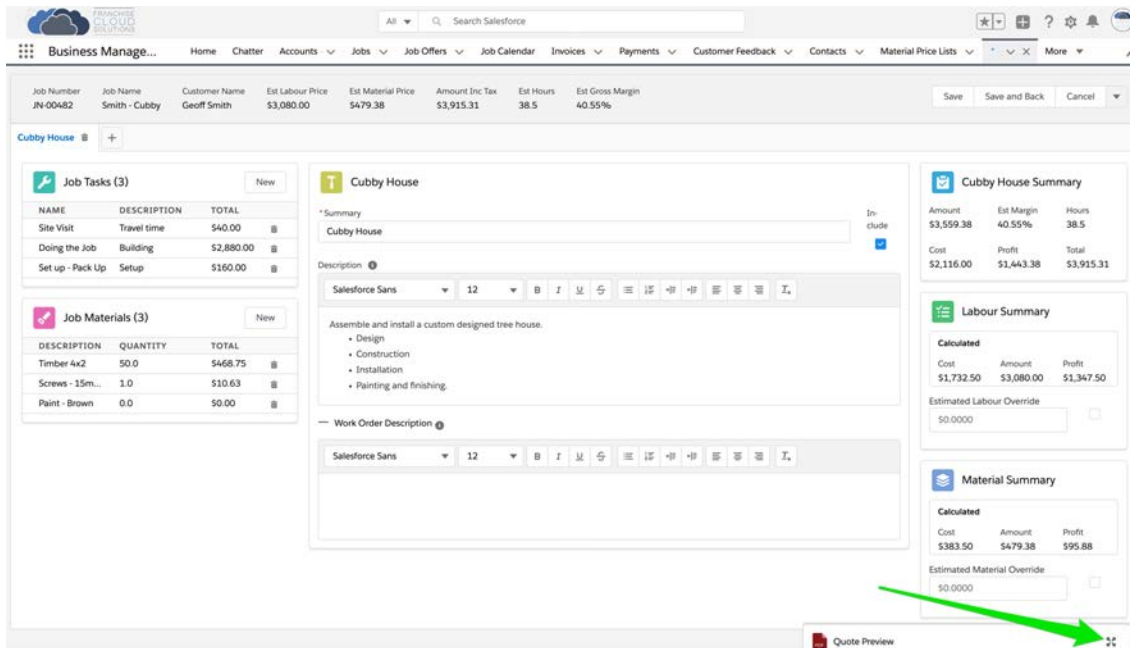
1. Generating a quote has been incorporated into the Plan Job page. To plan a job and generate a quote, select **Plan Job**.

The screenshot shows the 'Plan Job' page for job JN-00482. The top navigation bar includes links for Follow, Edit, Plan Job, Schedule Job, Invoice Job, Supplier Invoice, Credit Job, Clone, and Sharing. A green arrow points to the 'Plan Job' button. The main content area is divided into sections: Information, Owner, and Job Contact Information. The Information section includes fields for Job Name (Smith - Cubby), Job Number (JN-00482), Billing Profile, Customer (Geoff Smith), and Customer Contact. The Owner section includes Franchise (FCS - Ringwood North) and Territory Category. The Job Contact Information section includes Job Name, Job Number, and Billing Profile. The right sidebar shows Files (2), Notes (0), and Activity.

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.

The screenshot shows the 'Plan Job' page for job JN-00482. The top navigation bar includes links for All, Search Salesforce, and various other options. A green arrow points to the 'Save' button. The main content area is divided into sections: Job Tasks (3), Job Materials (3), Cubby House, and Cubby House Summary. The Cubby House section includes a description and a list of tasks. The Cubby House Summary section includes a table with columns for Amount, Est Margin, and Hours. The Job Materials section includes a table with columns for Description, Quantity, and Total. The Job Tasks section includes a table with columns for Name, Description, and Total. A green box at the bottom highlights the 'Quote Preview' button, with the text 'Quote Preview becomes available' next to it.

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



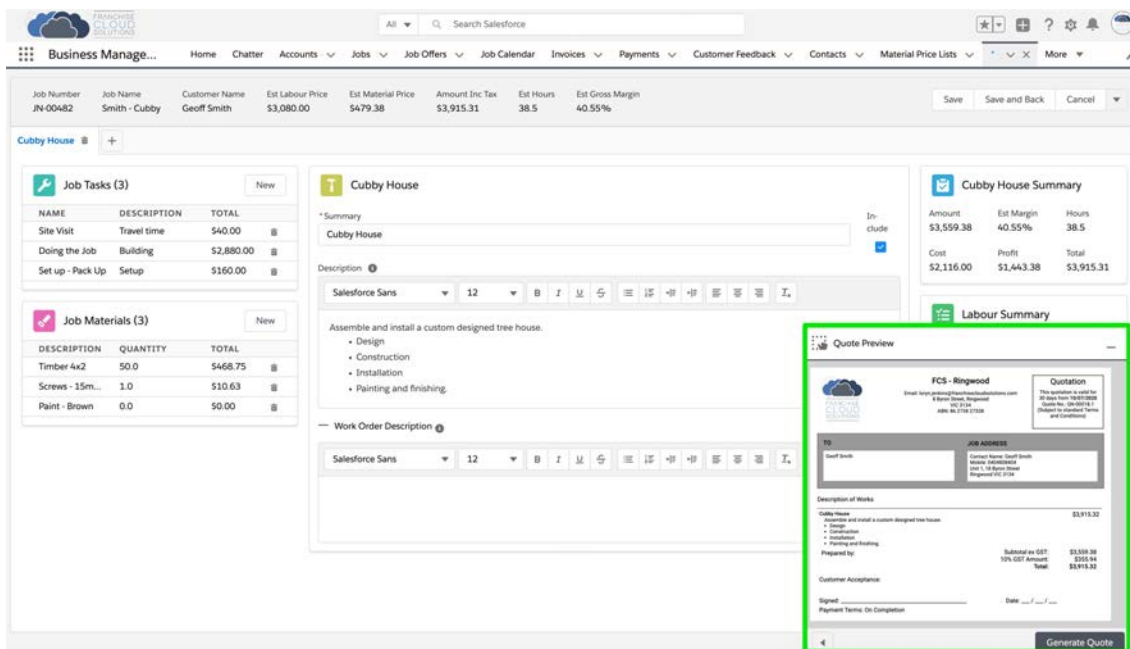
The screenshot shows the 'Business Management' software interface. At the top, there's a navigation bar with tabs like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and Material Price Lists. Below this, a header section displays job details: 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%. A 'Save' button is visible.

The main content area is divided into several sections:

- Job Tasks (3):** A table with columns NAME, DESCRIPTION, and TOTAL. It lists 'Site Visit' (Travel time, \$40.00), 'Doing the Job' (Building, \$2,880.00), and 'Set up - Pack Up' (Setup, \$160.00).
- Job Materials (3):** A table with columns DESCRIPTION, QUANTITY, and TOTAL. It lists 'Timber 4x2' (50.0, \$468.75), 'Screws - 15m...' (1.0, \$10.63), and 'Paint - Brown' (0.0, \$0.00).
- Cubby House:** A section for describing the job. It includes a 'Summary' tab, a 'Description' field with a rich text editor, and a 'Work Order Description' field.
- Cubby House Summary:** A summary table showing Amount (\$3,559.38), Est Margin (40.55%), and Hours (38.5). It also shows Cost (\$2,116.00), Profit (\$1,443.38), and Total (\$3,915.31).
- Labour Summary:** A section showing calculated costs and profit. It lists 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 section showing calculated costs and profit. It lists Cost (\$383.50), Amount (\$479.38), and Profit (\$95.88). It also includes an 'Estimated Material Override' field set to \$0.0000.

A green arrow points to the 'Quote Preview' button located at the bottom right of the interface.

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



This screenshot shows the same 'Business Management' software interface as before, but with a 'Quote Preview' window open in the bottom right corner. The window displays a professional quote document for 'FCS - Ringwood'.

The 'Quote Preview' window includes the following sections:

- Header:** FCS - Ringwood logo and contact information (Email: info@ringwoodfcs.com.au, Phone: 08 9438 1000, Address: 100-110 Ringwood Rd, Ringwood VIC 3114).
- To:** Geoff Smith, Customer Name: Geoff Smith, Address: 100-110 Ringwood Rd, Ringwood VIC 3114.
- Description of Works:** A list of tasks and their estimated costs: 'Cubby House' (\$3,915.32), 'Design' (\$40.00), 'Construction' (\$2,880.00), 'Installation' (\$160.00), and 'Painting and finishing' (\$0.00).
- Prepared by:** YN-GST Amount: \$3,915.32, Total: \$3,915.32.
- Customer Acceptance:** A section for the customer to sign and date the quote.
- Footer:** A 'Generate Quote' button.

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**.

**Job Summary Table:**

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%

**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 - 15mm...	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

**Quote Preview:**

**FCB - Ringwood**  
Email: [info@ringwoodbusiness.com](mailto:info@ringwoodbusiness.com)  
4 Bann Street, Ringwood  
VIC 3113  
ABN 85 1781 1104

**Quotation**  
This quotation is valid for 30 days from 18/01/2018  
Quoted by: Iorinj + Gsmith  
and conditions

**TO:** Geoff Smith  
**JOB ADDRESS:** Customer Name: Geoff Smith  
Address: 18 Bann Street  
Ringwood VIC 3113

**Description of Works:**

Cubby House	\$3,915.32
Assemble and install a custom designed tree house.	
• Design	
• Construction	
• Installation	
• Painting and finishing	
Prepared by:	
Customer Acceptance:	
Signature: _____	DATE: ____/____/____
Payment Terms: On Completion	

**Summary:**

Subtotal ex GST:	\$3,559.38
10% GST Amount:	\$355.94
<b>Total:</b>	<b>\$3,915.32</b>

**Generate Quote**

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

Compose Email

**Send to**

One or more contacts

Geoff Smith (iorinj+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** Edit Content

Using the selected template for email content.

**Selected Attachments**

QN-00018.1

**Add Attachments**

Upload Additional Files

Add Attachments From Record

- » 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 shows a software interface for creating a quote. The main heading is 'Mowing and gardening'. Below this, there are fields for 'Customer Name' (Daniel Coyle), 'Est Labour Price' (\$550.00), 'Est Material Price' (\$0.00), 'Amount inc Tax' (\$605.00), 'Est Hours' (5.50), and 'Est Gross Margin' (55%).

On the left, there are sections for 'Job Tasks (2)' and 'Job Materials (0)'. The 'Job Tasks' section has a table with columns 'NAME', 'DESCRIPTION', and 'TOTAL'. It lists 'Site Visit' (Travel, \$50.00) and 'Doing the Job' (Mowing, \$150.00). The 'Job Materials' section is empty.

The main area is titled 'Mowing' and contains a 'Summary' section with a table showing 'Amount' (\$200.00), 'Est Margin' (55.00%), and 'Hours' (2). Below this is a 'Description' section with a text area containing 'Mow front, side and rear lawns.' and a photo of a house with a lawn.

On the right, there are three summary sections: 'Mowing Summary', 'Labour Summary', and 'Material Summary'. Each section has a table with 'Cost', 'Amount', and 'Profit' columns. The 'Mowing Summary' table shows 'Cost' (\$90.00), 'Amount' (\$200.00), and 'Profit' (\$110.00). The 'Labour Summary' table shows 'Cost' (\$90.00), 'Amount' (\$200.00), and 'Profit' (\$110.00). The 'Material Summary' table shows 'Cost' (\$0.00), 'Amount' (\$0.00), and 'Profit' (\$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 'Business Management' software interface. The top navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', 'Material Price Lists', and 'More'. The 'More' button is highlighted with a green arrow labeled '1'. A dropdown menu is open, showing options: 'Create Template', 'Use Template', 'Add Quote Option', and 'Turn Privacy On'. The 'Add Quote Option' option is highlighted with a green arrow labeled '2'.

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	
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	



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

3. 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**

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

**Job Tasks (2)** [New]

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

**Job Materials (0)** [New]

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

**Mowing** [Include] ☒  
\* Summary: Mowing  
Description: Mow front, side and rear lawns.  
[Image of a house with a lawn]

**Work Order Description**  
Salesforce Sans 12 [Rich Text Editor]

**Mowing Summary**

Amount	Est Margin	Hours
\$200.00	55.00%	2

Cost	Profit	Total
\$90.00	\$110.00	\$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 'Business Management' software interface for a job titled 'Mowing and gardening'. The top navigation bar includes links like Home, Charter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and Material Price Lists. The job details section shows 'Customer Name: Daniel Coyle', 'Est Labour Price: \$50.00', 'Est Material Price: \$0.00', 'Amount Inc Tax: \$600.00', 'Est Hours: 8.50', and 'Est Gross Margin: 80%'. Below this, there are tabs for 'Show All' and 'Mowing only'. The 'Mowing' tab is selected, showing a list of 'Job Tasks (2)' with columns for NAME, DESCRIPTION, and TOTAL. The tasks listed are 'Site Visit' (Travel, \$50.00) and 'Doing the Job' (Mowing, \$150.00). There is also a 'Job Materials (0)' section. The main area displays the 'Mowing' task details, including a description, a photo of a lawn, and a 'Work Order Description' section. On the right, there are summary sections for 'Mowing Summary', 'Labour Summary', and 'Material Summary', each showing calculated costs, amounts, and profits.

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

The screenshot shows the 'Business Management' software interface for a job titled 'Mowing and gardening - Mowing only'. The top navigation bar is the same as the previous screenshot. The job details section shows '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%'. Below this, there are tabs for 'Show All' and 'Mowing only'. The 'Mowing only' tab is selected, showing a list of 'Mowing only Option' with columns for Name, Description, and TOTAL. The option listed is 'Mowing only' (Mow front and back lawns, \$150.00). There is also a 'Job Tasks (2)' section. The main area displays the 'Mowing' task details, including a description, a photo of a lawn, and a 'Work Order Description' section. On the right, there are summary sections for 'Mowing Summary', 'Labour Summary', and 'Material Summary', each showing calculated costs, amounts, and profits. A green arrow points to the 'x' button next to the 'Mowing' task name in the 'Mowing only Option' section.



» 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 option form. The 'Mowing only Option' is selected, and the 'Edit' button is highlighted with a green arrow. The form includes fields for Name, Description, and a list of Job Tasks. The Job Tasks table shows:

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

The 'Mowing' section shows a description of 'Mow front, side and rear lawns' and a photo of a lawn. The 'Mowing Summary' section shows:

Amount	Est	Hours
\$200.00		2

The 'Labour Summary' section shows:

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

The 'Material Summary' section shows:

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

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

The screenshot shows the 'Mowing and gardening - Mowing only' job option form. The 'Delete' button is highlighted with a green arrow. The form includes fields for Name, Description, and a list of Job Tasks. The Job Tasks table shows:

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

The 'Mowing' section shows a description of 'Mow front, side and rear lawns' and a photo of a lawn. The 'Mowing Summary' section shows:

Amount	Est	Hours
\$200.00		2

The 'Labour Summary' section shows:

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

The 'Material Summary' section shows:

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



» 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 titled 'Mowing and gardening - Mowing only'. The interface includes a top navigation bar with various menu items like Home, Charter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, and Material Price Lists. Below the navigation bar, there's a summary section showing job details: 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. On the left, there's a 'Mowing only' section with a 'Mowing only Option' card. This card has a 'Name' field (Mowing only), a 'Description' field (Mow front and back lawns), and a button labeled 'Apply Customer Selected Option'. A green arrow points to this button. Below this, there are sections for 'Job Tasks (2)' and 'Job Materials (0)', each with a 'New' button.

In the center, there's a 'Mowing' section with a 'Description' field (Mow front, side and rear lawns) and a 'Work Order Description' field. Below these fields is a photo of a house with a lawn.

On the right, there are three summary boxes: 'Mowing Summary', 'Labour Summary', and 'Material Summary'. Each box shows calculated values for Cost, Amount, and Profit.

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



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

Deluxe

Description

Mowing & Gardening

☒ 1: Mowing

☒ 2: Gardening

Cancel

Save

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

Business Management

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

JN-00190 Mowing and gardening - Deluxe

Save Save and Back Invoice Job Cancel

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

Show All Mowing only Deluxe

Deluxe Option

Name: Deluxe

Description: Mowing & Gardening

Apply Customer Selected Option

Job Tasks (2)

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

Job Materials (0)

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

1 Mowing


Summary

Mowing

Description

Salesforce Sans 12 B I U L

More front, side and rear lawns.



Work Order Description

Salesforce Sans 12 B I U L

Mowing Summary

Amount	Est Margin	Hours
\$200.00	55.00%	2

Cost	Profit	Total
\$90.00	\$110.00	\$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

## 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.

CHAPTER 6 | Job planning and estimation

clxviii

## 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 job titled 'Mowing and gardening - Mowing only'. The job is associated with customer 'Daniel Coyle'. Key details include: 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 includes several sections:

- Mowing only Option:** A table with columns 'Name', 'Description', and 'TOTAL'. It lists 'Mowing only' with a description 'Mow front and back lawns' and a total of \$150.00.
- Job Tasks (2):** A table with columns 'NAME', 'DESCRIPTION', and 'TOTAL'. It lists '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 table with columns 'Amount', 'Est', 'Margin', and 'Hours'. It shows an amount of \$200.00, an estimated margin of 55.00%, and 2 hours.
- Labour Summary:** A table with columns 'Cost', 'Amount', and 'Profit'. It shows a cost of \$90.00, an amount of \$200.00, and a profit of \$110.00.
- Material Summary:** A table with columns 'Cost', 'Amount', and 'Profit'. It shows a cost of \$0.00, an amount of \$0.00, and a profit of \$0.00.

A green arrow labeled '1' points to the 'Mowing only' tab. A green arrow labeled '2' points to the 'Quote Preview' button at the bottom right.

2. Select **Generate Quote**.

The screenshot shows the 'Business Management' software interface for the same job. A green arrow points to the 'Generate Quote' button at the bottom right.

The interface includes several sections:


- Mowing only Option:** A table with columns 'Name', 'Description', and 'TOTAL'. It lists 'Mowing only' with a description 'Mow front and back lawns' and a total of \$150.00.
- Job Tasks (2):** A table with columns 'NAME', 'DESCRIPTION', and 'TOTAL'. It lists '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 table with columns 'Amount', 'Est', 'Margin', and 'Hours'. It shows an amount of \$200.00, an estimated margin of 55.00%, and 2 hours.
- Labour Summary:** A table with columns 'Cost', 'Amount', and 'Profit'. It shows a cost of \$90.00, an amount of \$200.00, and a profit of \$110.00.
- Material Summary:** A table with columns 'Cost', 'Amount', and 'Profit'. It shows a cost of \$0.00, an amount of \$0.00, and a profit of \$0.00.

A green arrow points to the 'Generate Quote' button at the bottom right.

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

 Upload Files

Or drop files

---

Cancel

Cancel and Remove Attachments ⓘ

Send




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

4. 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

 Upload Files Or drop files

Add Attachments From Record

☐ QN-00384.1\_Mowing only.pdf

---

Cancel Cancel and Remove Attachments ⓘ Send

- 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**

PDF 

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

Cancel Cancel and Remove Attachments ⓘ Send

- 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.



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: \$818.18 Est Material Price: \$0.00 Amount Inc Tax: \$900.00 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

Description

Salesforce Sans 12 B I U 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 S

**Premium Shower Makeove...**

Amount	Est Margin	Hours
\$818.18	100.00%	0

Cost	Profit	Total
\$0.00	\$818.18	\$900.00

**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**.

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 screenshot shows the 'Business Management' interface for a job named 'Cubby House'. At the top, there's a navigation bar with tabs like Home, Chatter, Accounts, Contacts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, 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%. To the right of this bar are buttons for 'Save', 'Save and Back', and 'Cancel'. A green arrow points to the 'Save and Back' button. The main area is divided into 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), 'Cubby House' summary with a description and a list of tasks (Design, Construction, Installation, Painting and finishing), and three summary cards on the right: 'Cubby House Summary', 'Labour Summary', and 'Material Summary', each showing calculated costs, amounts, and profits.

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 the 'Business Manager' software interface for a job named 'Cubby House'. The top navigation bar includes tabs for Home, Chatter, Accounts, Contacts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, and Material Price Lists. The main content area is divided into several sections:

- Job Tasks (3):** A table listing tasks such as 'Site Visit', 'Doing the Job', and 'Set up - Pack Up' with their respective descriptions and totals.
- Job Materials (3):** A table listing materials like 'Timber 4x3', 'Screens - 15m', and 'Paint - Brown' with their quantities and totals. This section is highlighted with a green border.
- Cubby House Summary:** A summary of the job's financials, including Amount, Est Margin, Hours, Cost, Profit, and Total.
- Labour Summary:** A summary of labor costs, including Calculated, Cost, Amount, Profit, and Estimated Labour Override.
- Material Summary:** A summary of material costs, including Calculated, Cost, Amount, Profit, and Estimated Material Override.



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' software interface. The top navigation bar includes 'Home', 'Tasks', 'Chatter', 'Accounts', 'Jobs', 'Job Calendar', 'Invoices', 'Contacts', 'Audits', 'Payments', 'Reports', 'Dashboards', 'Notes', 'Job Offers', 'Customer Feedback', and 'More'. The main content area is divided into tabs: 'Details', 'Quotes/Invoices', 'Financial Breakdown', 'Feedback/Marketing', 'Files & Notes', and 'History'. The 'Quotes/Invoices' tab is active, and the 'Job Material Shopping List' link is highlighted with a green arrow. The 'Files (2)' section on the right shows two PDF files: 'QV-0018-v2.pdf' and 'QV-0018.1.pdf'.

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

The screenshot shows the 'Business Management' software interface with the 'Materials Shopping List' report displayed. The report title is 'Report: Job Material List Material Shopping List'. The 'Total Records' section shows 3 records. The table below lists the materials and their costs.

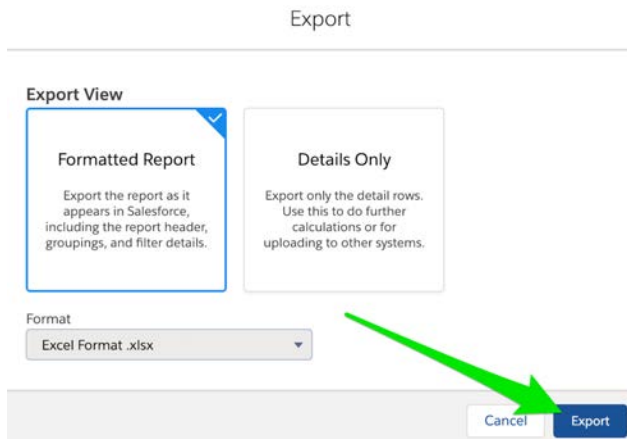
Job Name	Summary	Description	Job Material Reference	Quantity	Size	Supplier	Supplier Part #	Material Total
Maxwell (3)	Gardening service (3)	Timber 4x2	JMR-1526741	5.00	-	Bunnings	-	AUD 71.88
		Dulux Metalshield High Gloss White Epoxy Enamel Spray paint	JMR-1526742	4.00	-	bunnings	-	AUD 54.74
		125mm 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 'Business Management' software interface with the 'Materials Shopping List' report displayed. The 'Total Records' section shows 3 records. The table below lists the materials and their costs. A green arrow points to the 'Export' button in the top right corner of the report area.

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)							

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](mailto: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	
<a href="#">Accept Quote</a>	<a href="#">Accept Quote</a>	<a href="#">Decline All Quotes</a>

Please verify the Quote Number and Amount match before accepting.

**FCS Birchip**  
0431661077  
[support@franchisecloudsolutions.com](mailto: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.





# Working with Job Calendar

Understanding Job Calendar .....	clxxxii
----------------------------------	---------

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.

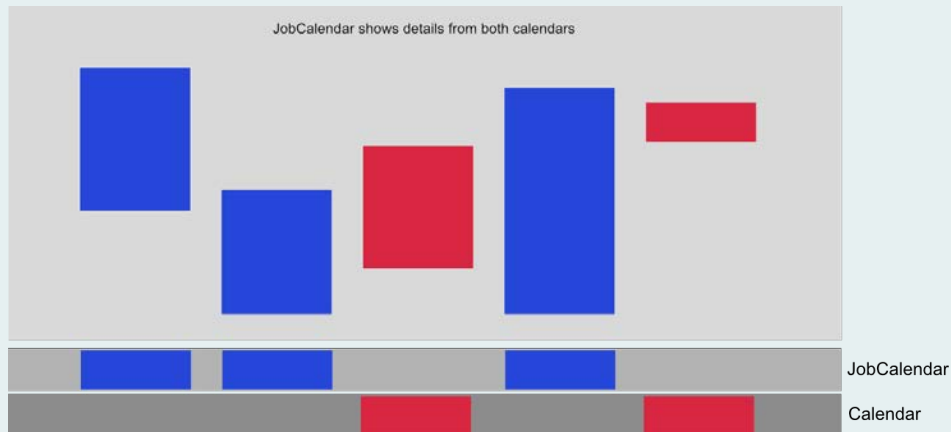
## Job Calendar and Salesforce Calendar work together

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.

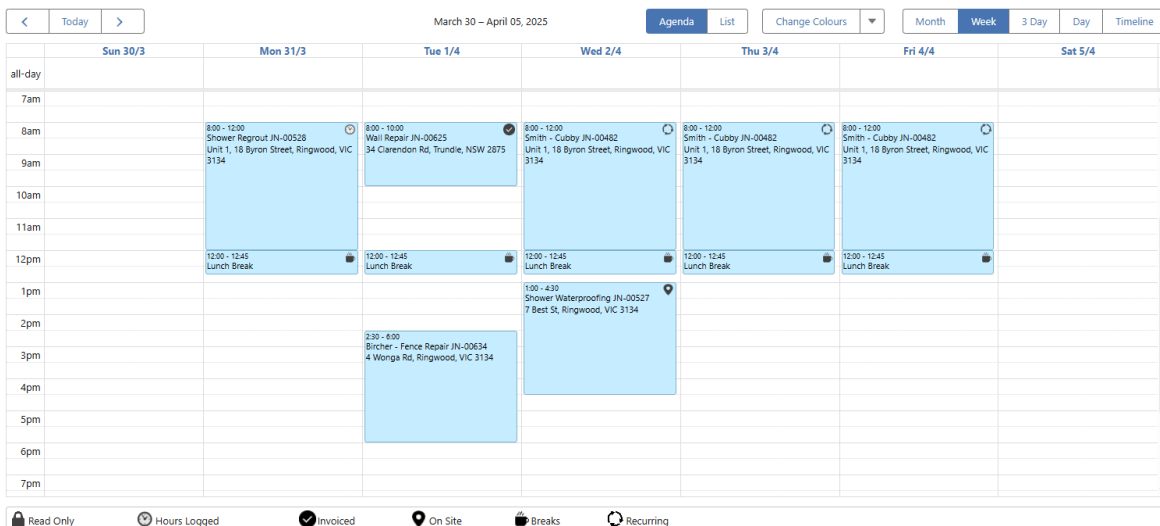


Both Calendar and Job Calendar events are displayed in either calendar. Using Job Calendar, you see all the details from both events. Using Calendar, times are blocked out for the Job Calendar events but you don't see the underlying detail.



## 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.

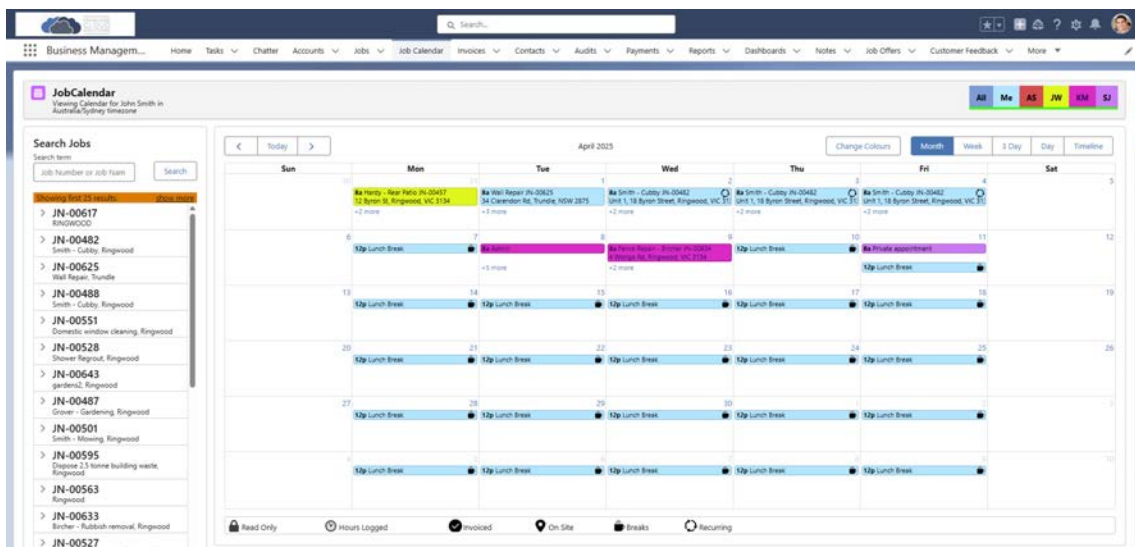
Icon	Description
Read Only	The event's related record has no job or no job visible to the current user. This might be because the user created the event on the calendar unrelated to a Job or because another user created the event using a Job for which the current user has no visibility.
On Site	A resource 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).

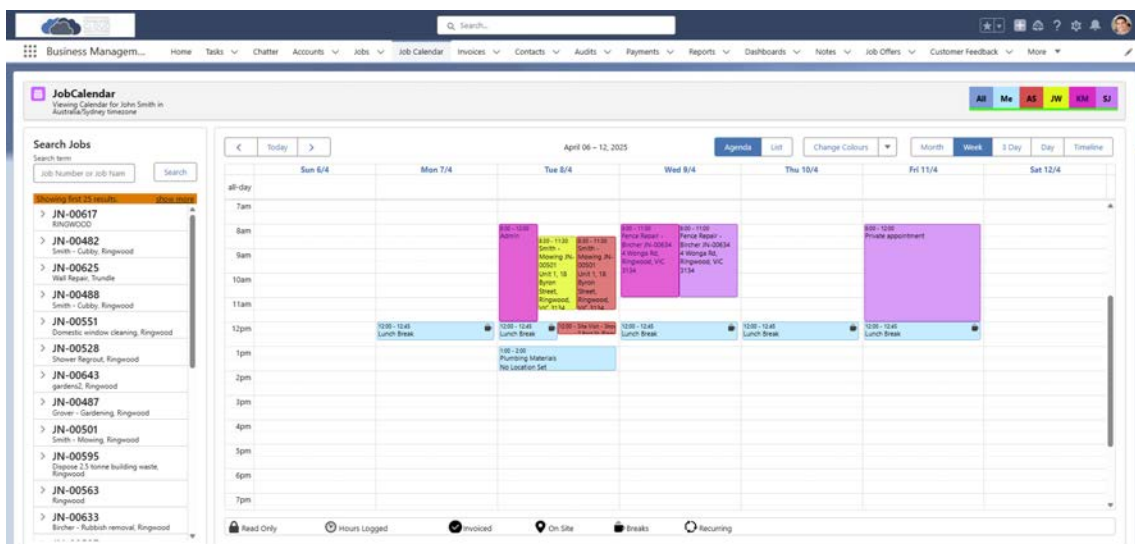
## Job Calendar can show a range of views

Job Calendar can show a range of different views

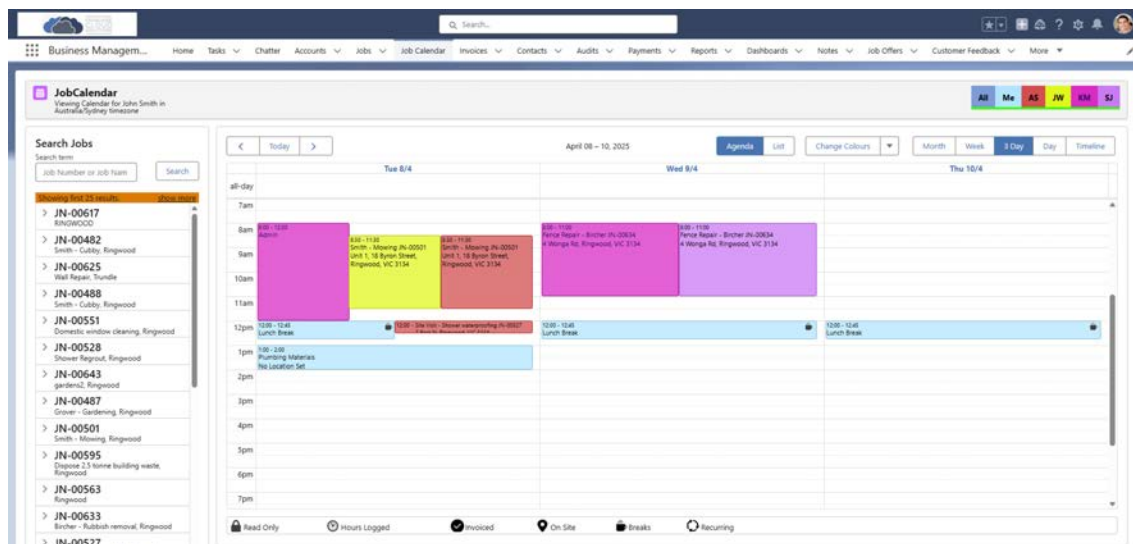
### » Month view



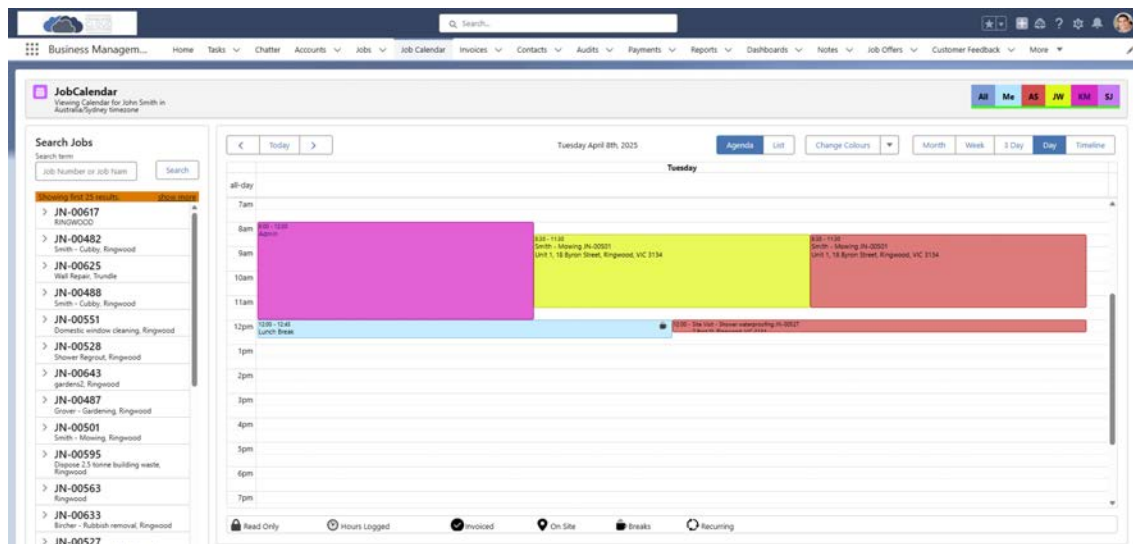
### » Week view



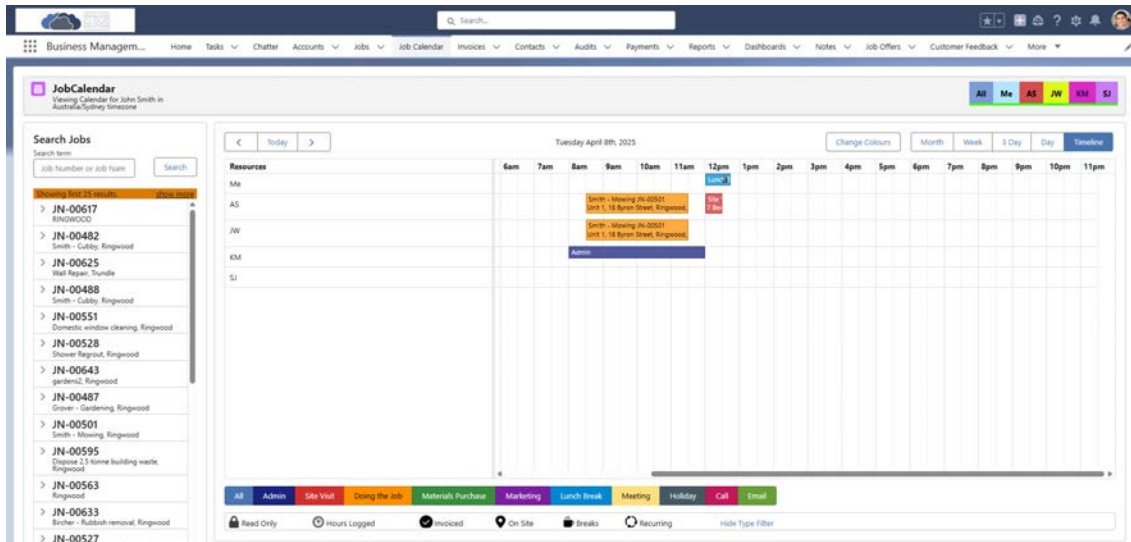
## » 3 Day view



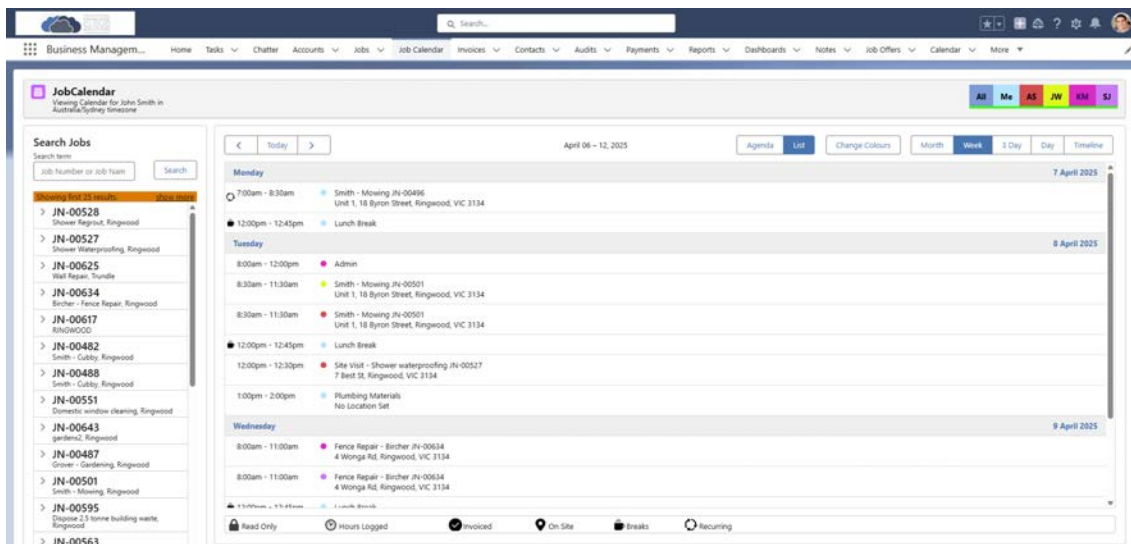
## » Day view



## » 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.

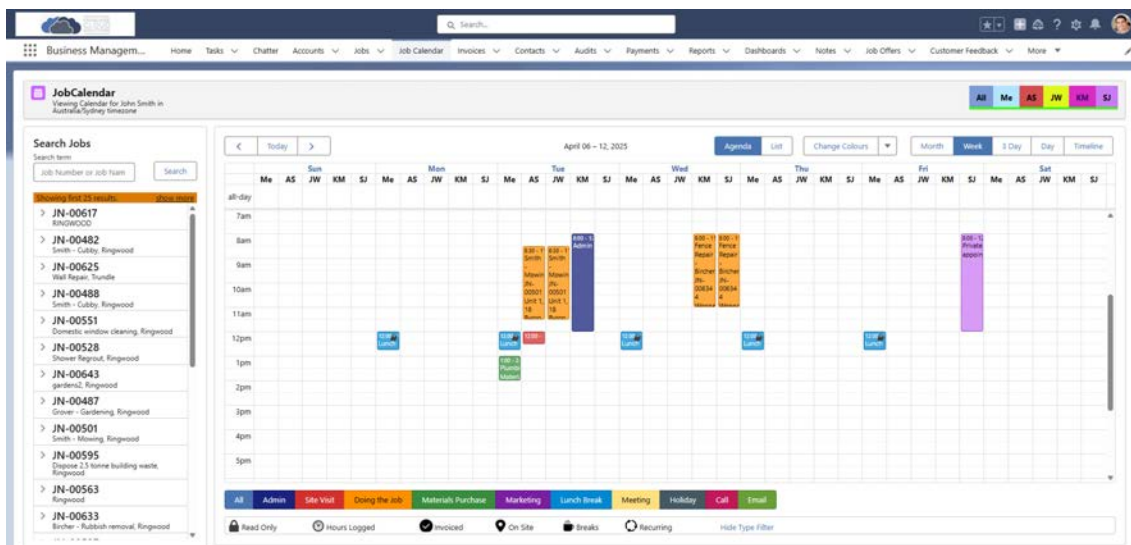


To go back to viewing events by the resource's alias colour, select **Ungroup Resources**.

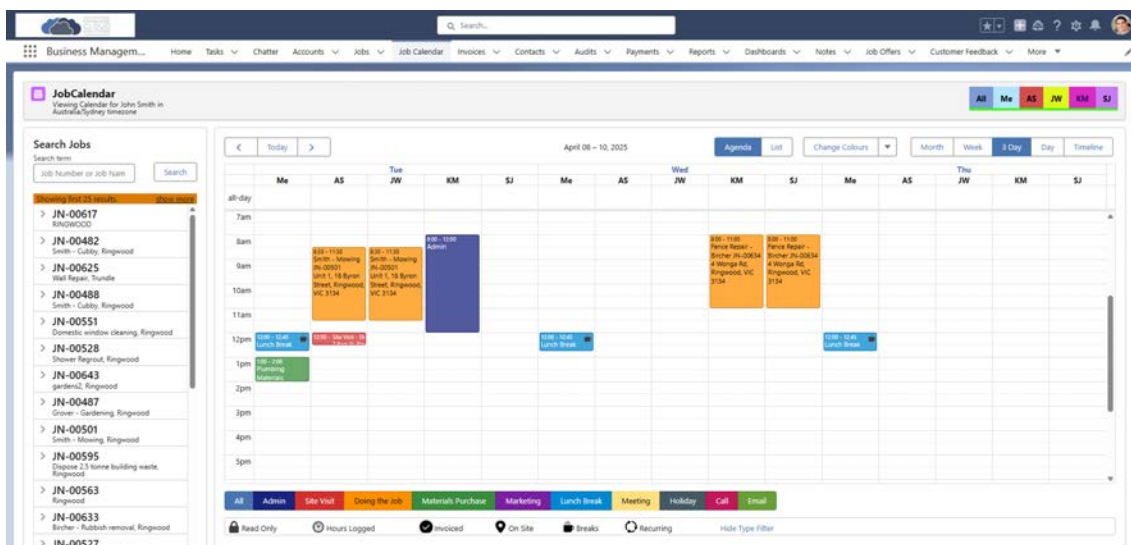


The colours for each event type are fixed and cannot be customised. The order of the event types depends on your organisation settings.

## » Week view

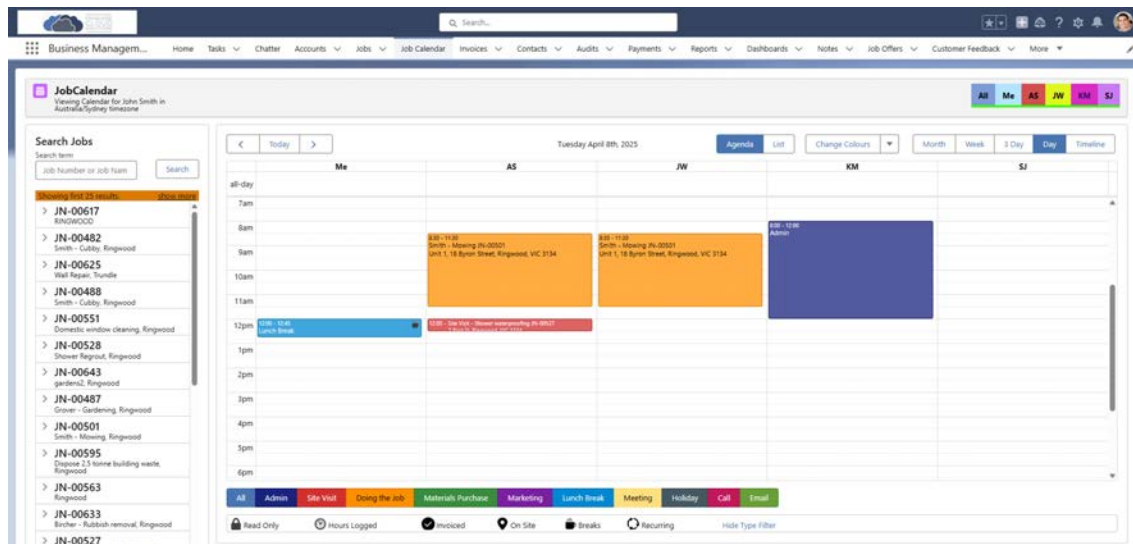


## » 3 Day view



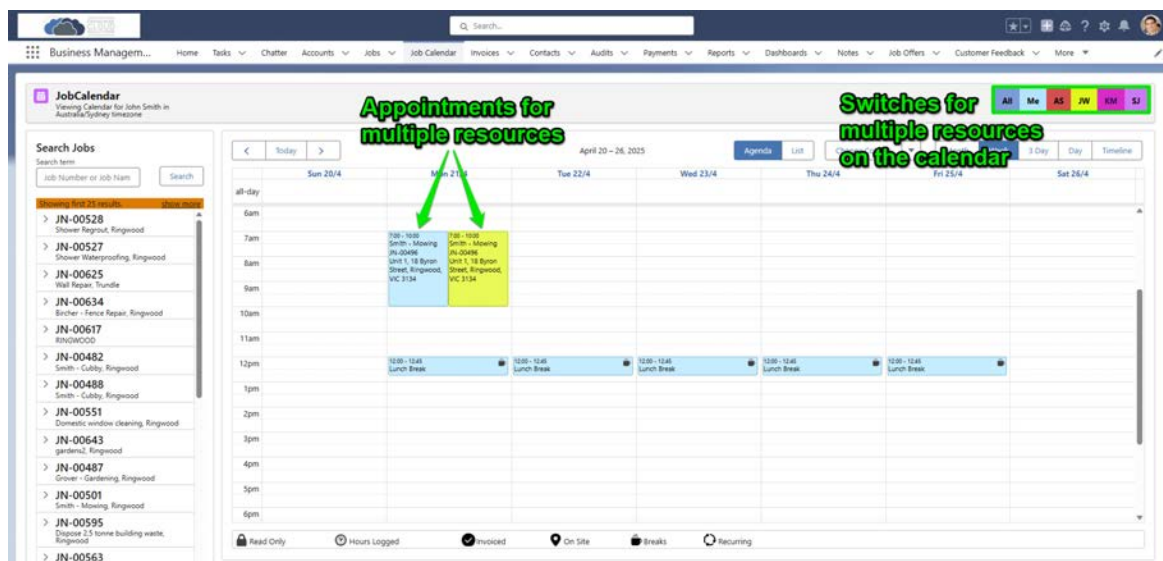


## » Day view



### 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.

Business Management... Home Tasks Chatter Accounts Jobs Job Calendar Invoices Contacts Audits Payments Reports Dashboards Notes Job Offers Calendar More

Calendar 20 April 2025 - 26 April 2025

Appointments for multiple resources

7am 8am 9am 10am 11am 12pm 1pm 2pm

SUN 20 MON 21 TUE 22 WED 23 THU 24 FRI 25 SAT 26

7am 8am 9am 10am 11am 12pm 1pm 2pm

APRIL 2025

My Calendars

- My Events

Other Calendars

- Andrew Stevens
- James Walker
- Sharon Jones

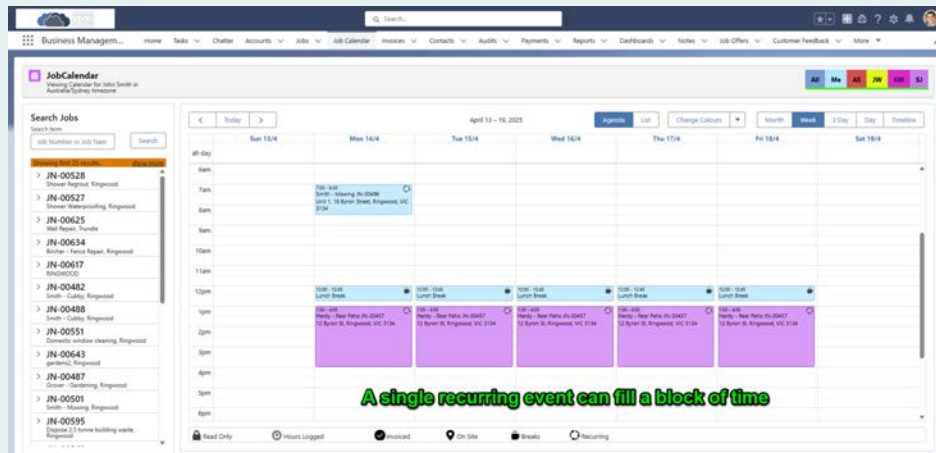
Switches for multiple resources on the calendar

## Repeating events for jobs in Job Calendar

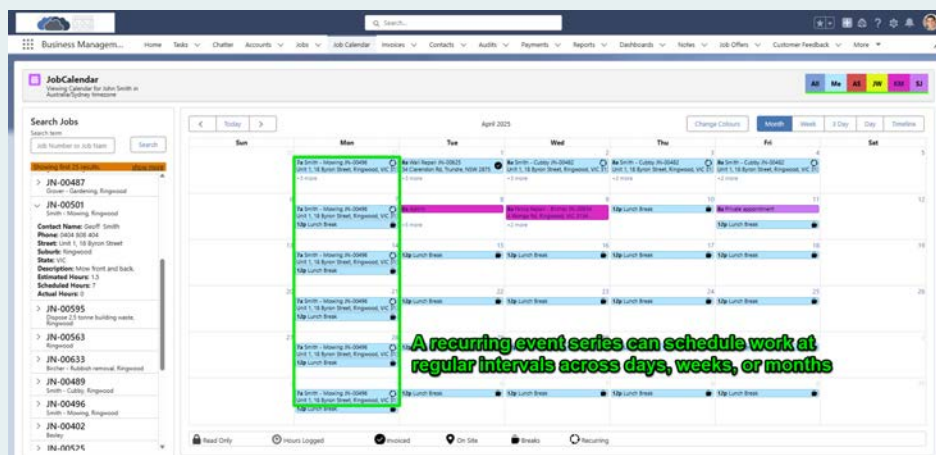
Job Calendar can be used for scheduling repeating job events.



Repeating job events can be used to schedule a block of time across several days.



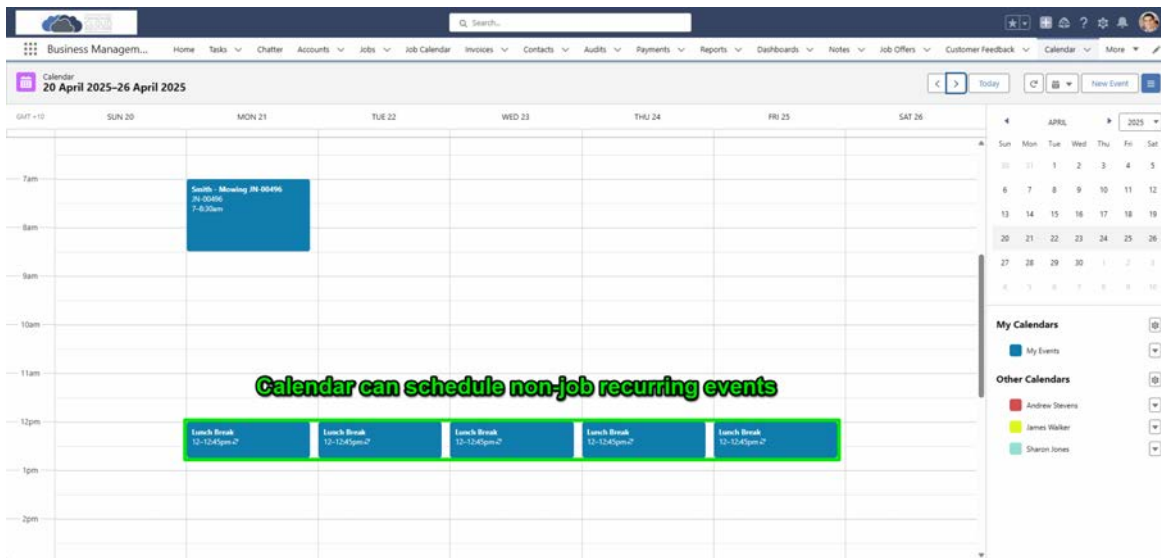
Repeating job events can also be used to schedule events that recur at fixed intervals.



## 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.

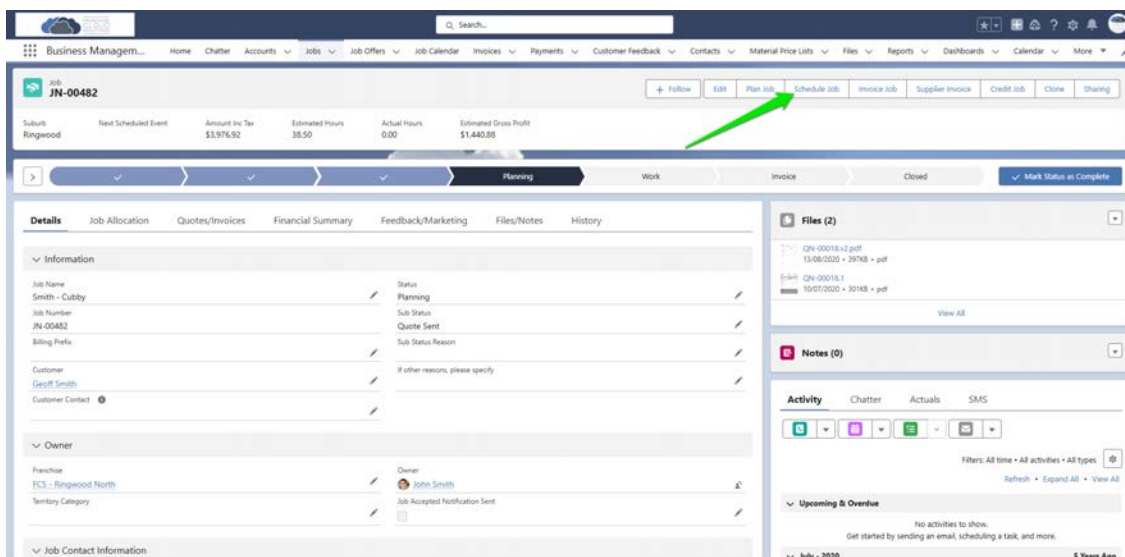


## How to access job scheduling

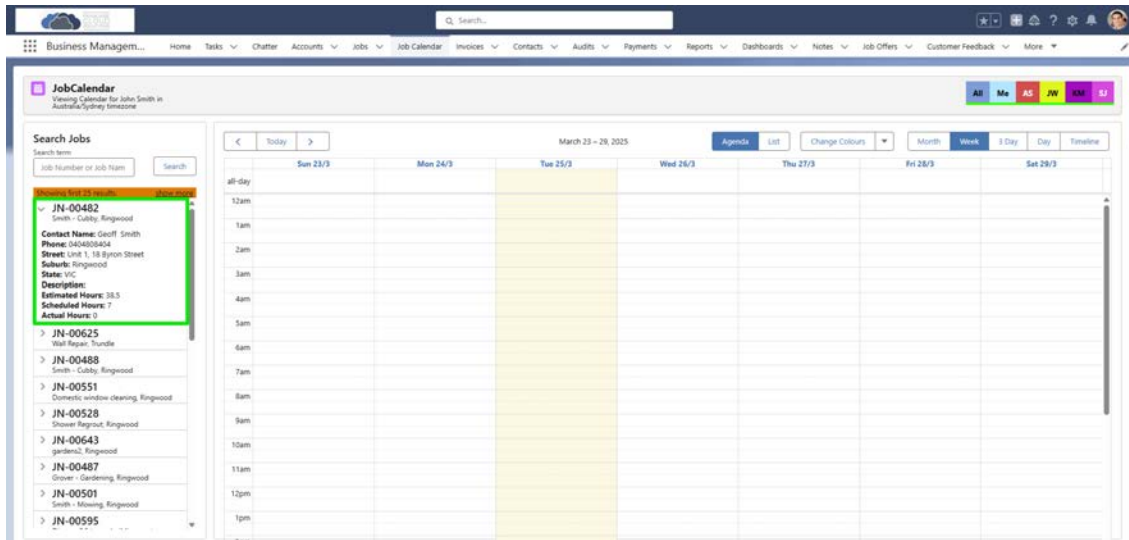
When the Job is ready to be scheduled, you schedule one or more appointments with the customer via the **Job Schedule** button.

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

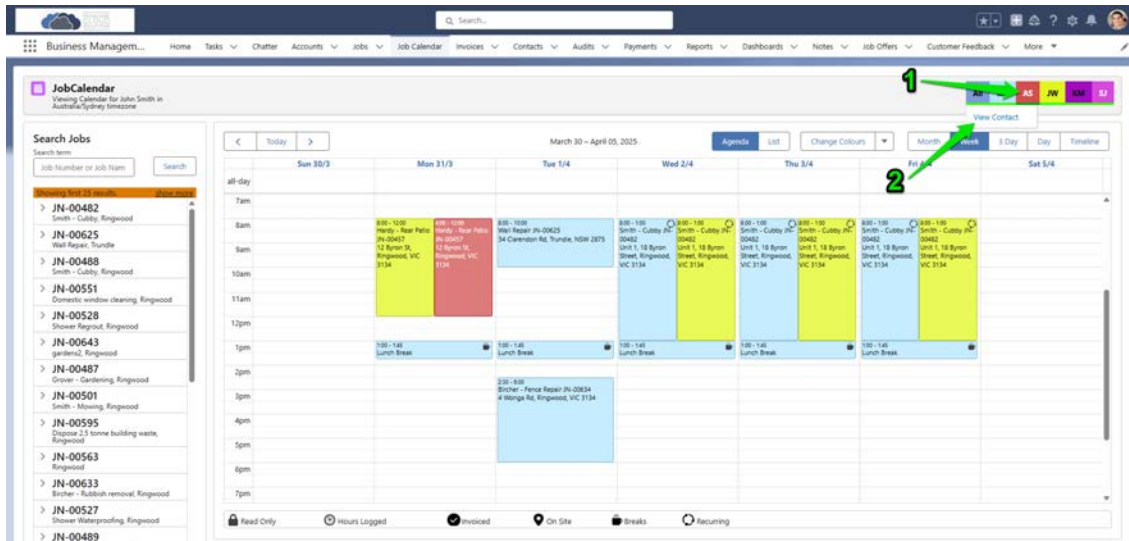
### How to add, remove or alter calendar resources



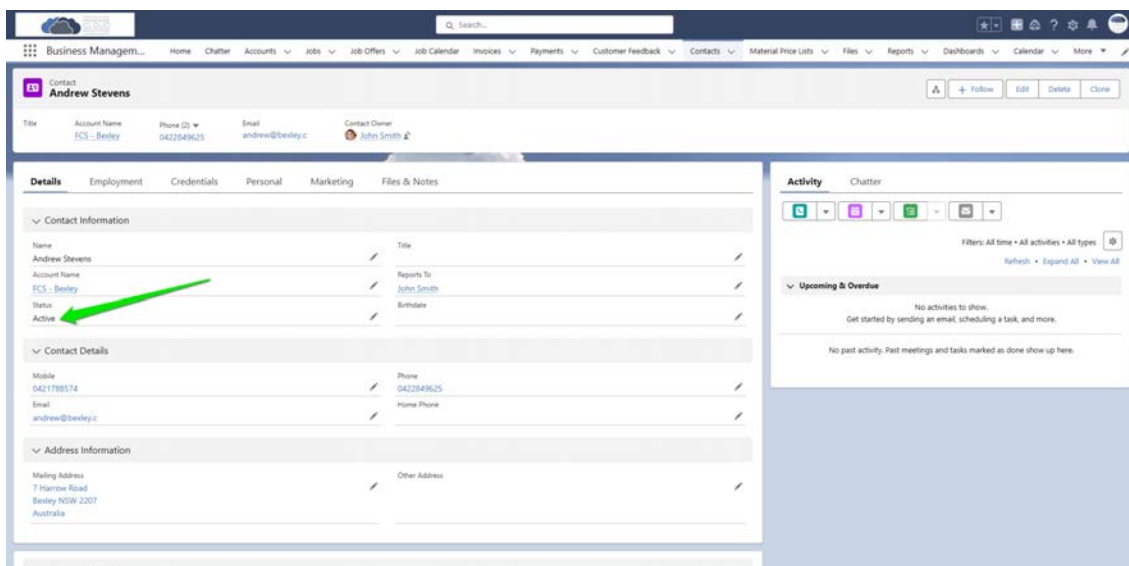
To add a Job Calendar resource, your system administrator will need to set up the new resource.

## To remove a Job Calendar resource

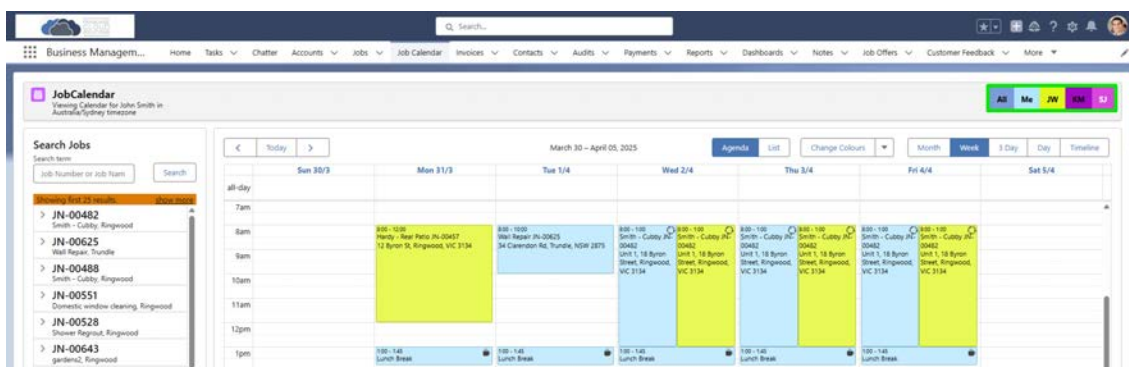
1. From the Job Calendar resource pane, right-click the resource you want to remove, then click **View Contact**.



2. Set the **Contact Status** field to *Inactive*.



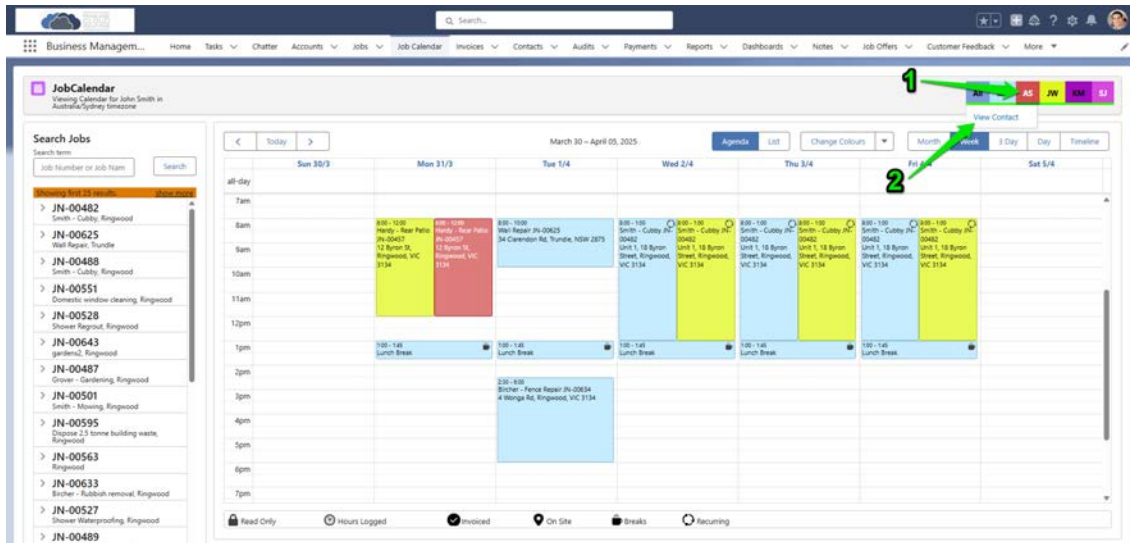
3. The resource is now removed from the Job Calendar resource pane.



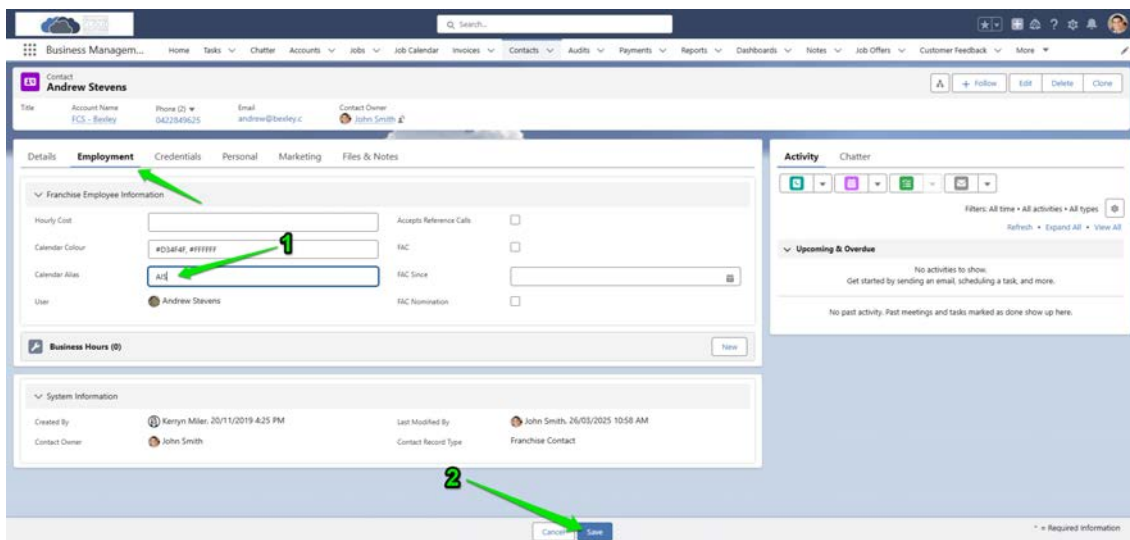


## To change a name on the resource pane

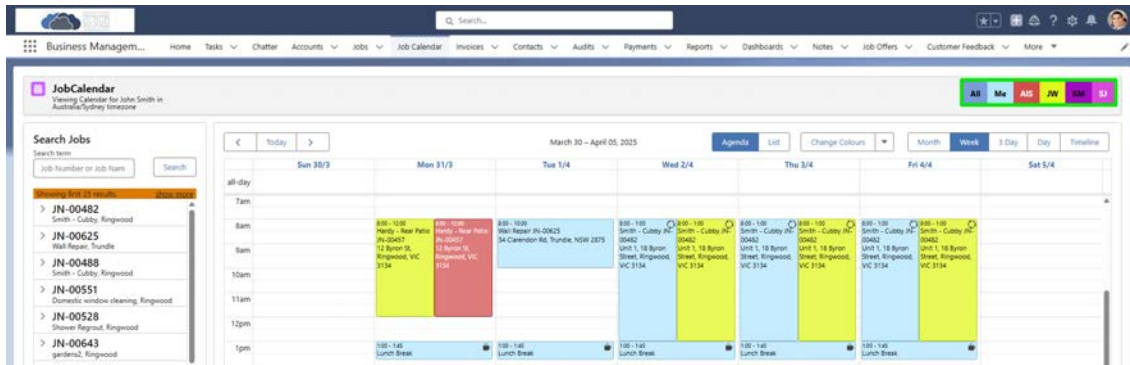
1. From the Job Calendar resource pane, right-click the resource whose alias you want to change, then click **View Contact**.



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.



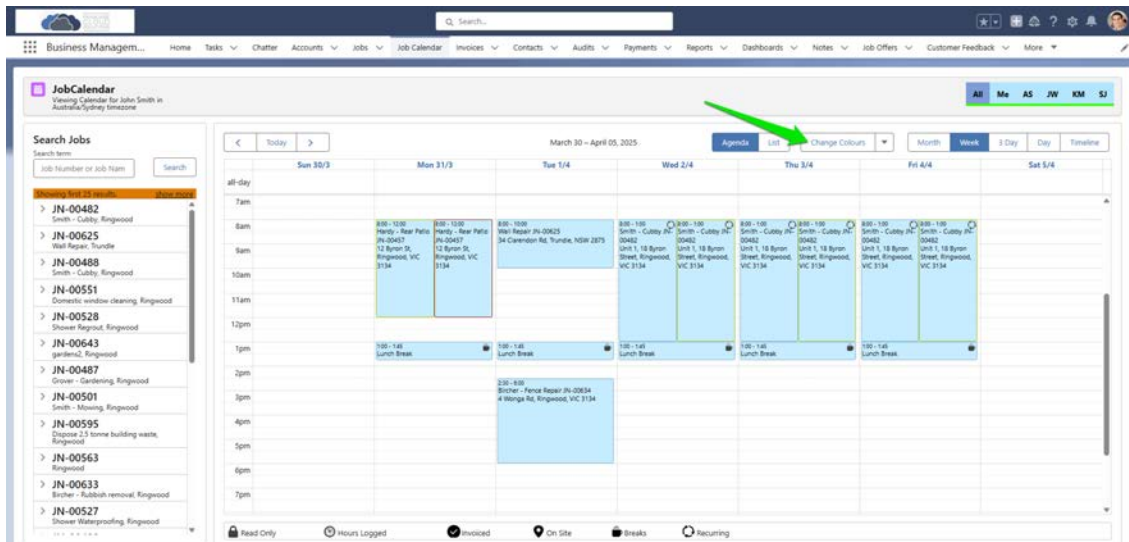


## How to change calendar colours

The colour of each appointment shows which employee has been assigned the job. You can change the colours used for each employee.

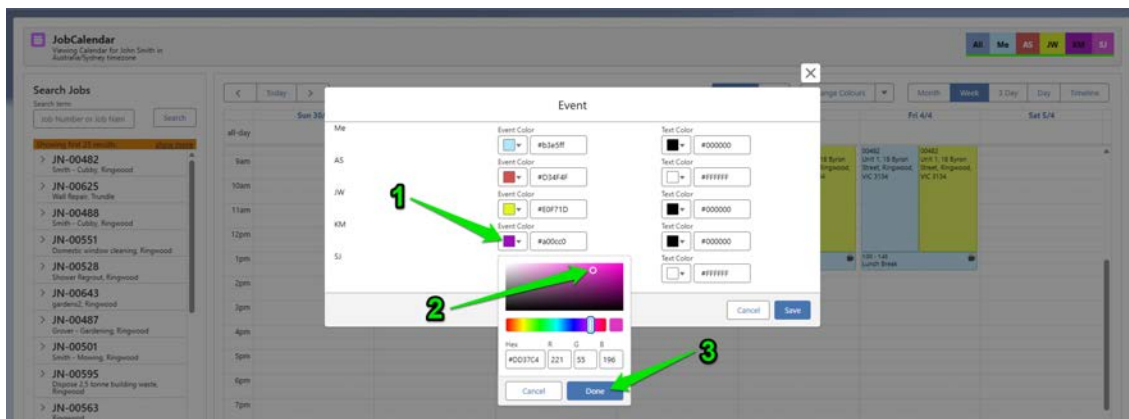
### To set the calendar colour for an employee

1. From the Job Schedule, press **Change Colours**.



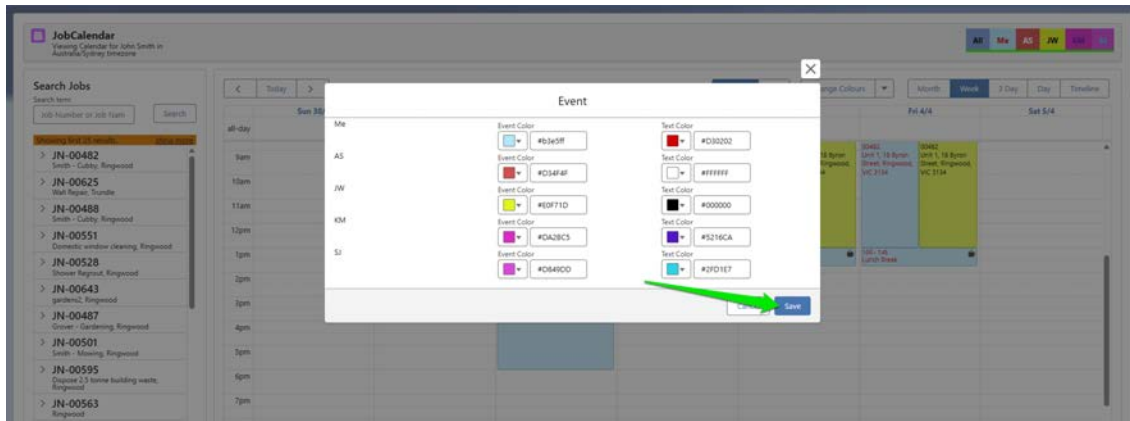
The **Event** colour picker dialog box appears.

2. Click on the **Event Color** drop down and select your desired colour, then press **Done**.

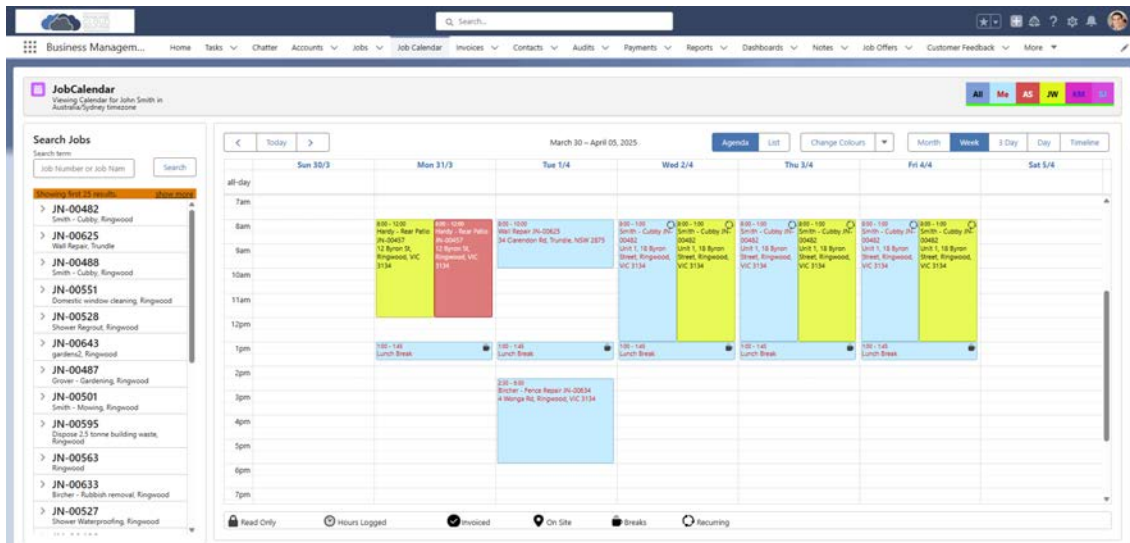


3. Change the **Text Color** in the same way.

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

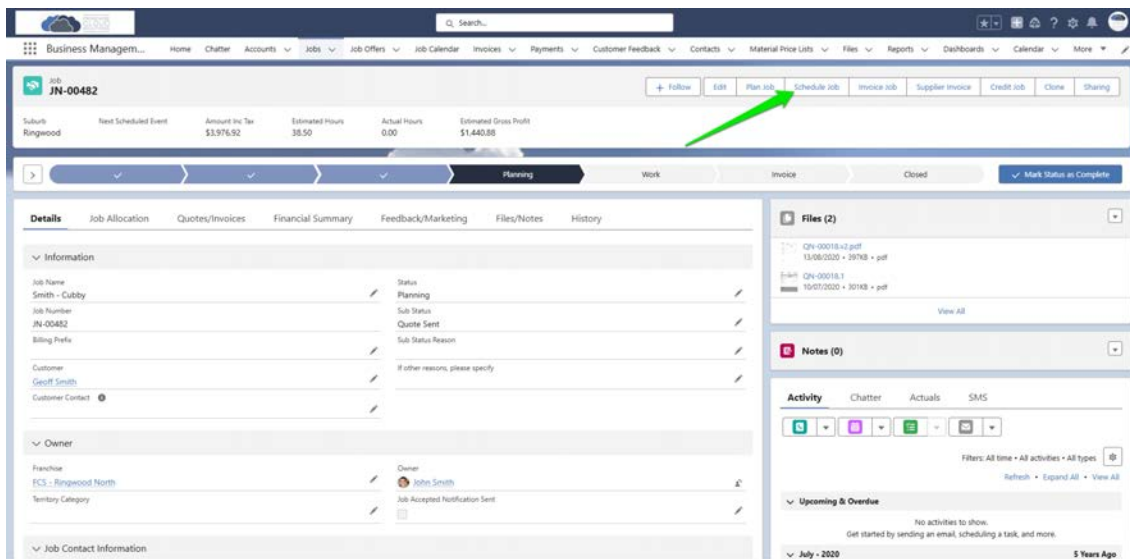
There are two ways to begin scheduling a job.

- » You can begin at the job, or
- » You can begin from the Job Calendar.

Once you're there, then you can schedule the job.

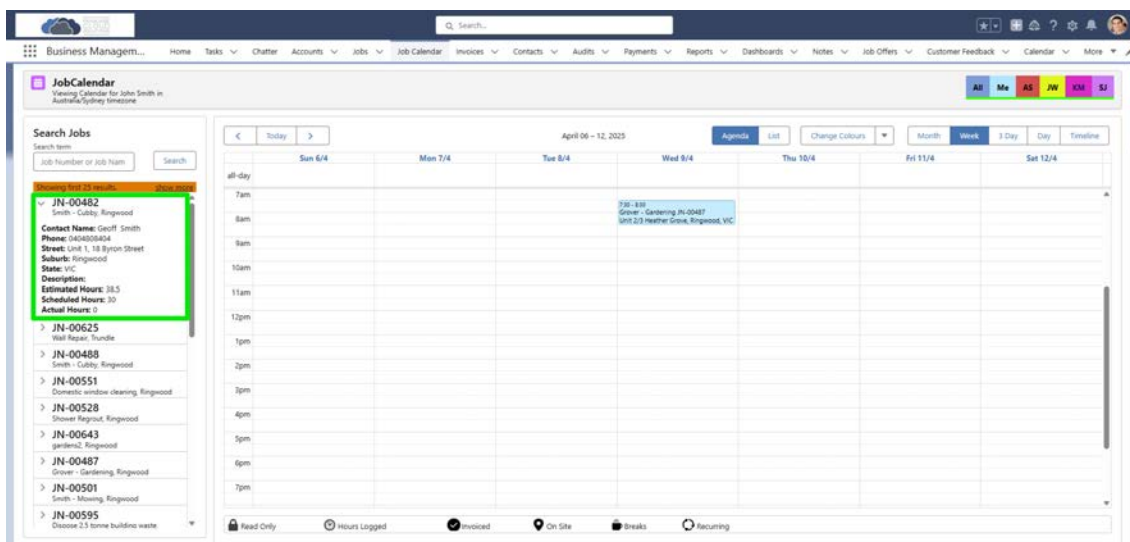
## To schedule a job appointment

1. From the Job page, press Schedule Job.

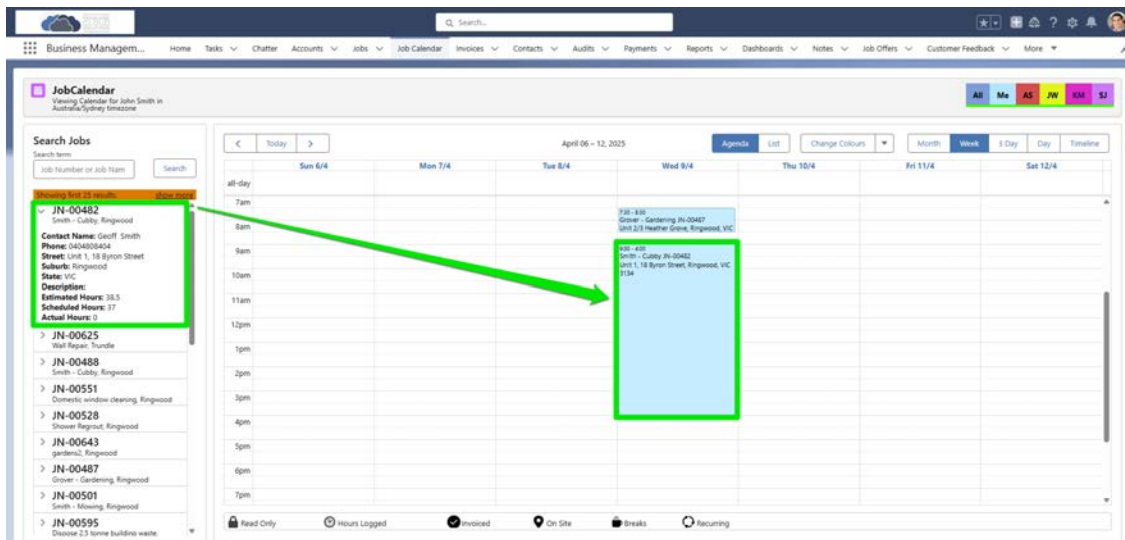


The Job Schedule page appears. You can now begin scheduling the job.

2. With the Job Calendar page in front of you, your job is already selected.



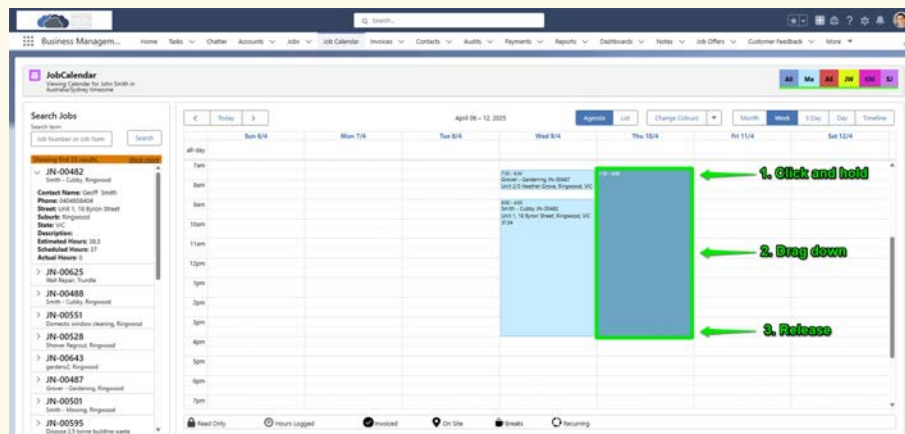
3. Now drag the job to the calendar in order to schedule it.



## 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: \* Date: 10/04/2025 \* Time: 7:30 am End Date Time: \* Date: 10/04/2025 \* Time: 4:00 pm

Description

Salesforce Sans 12 B I U L R E P A T

**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

Search...

JobCalendar  
Viewing Calendar for John Smith in Australia/Sydney timezone

Search Jobs  
Job Number or Job Name Search

Showing 10 of 10 jobs

Job Details for JN-00482  
Contact Name: Geoff Smith  
Phone: 0404809434  
Street: Unit 1, 18 Byron Street  
Suburb: Ringwood  
State: VIC  
Description:  
Estimated Hours: 38.5  
Scheduled Hours: 43.5  
Actual Hours: 0

Job Details for JN-00625  
Wall Repair: Trundle

Job Details for JN-00488  
Smith - Cubby: Ringwood

Job Details for JN-00551  
Domestic window cleaning: Ringwood

Job Details for JN-00528  
Shower Regrout: Ringwood

Job Details for JN-00643  
garden: Ringwood

Job Details for JN-00487  
Groom - Grooming: Ringwood

Job Details for JN-00501  
Smith - Mowing: Ringwood

Job Details for JN-00595  
Dispose 2.5 tonne building waste: Ringwood

April 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

all-day

7am

8am

9am

10am

11am

12pm

1pm

2pm

3pm

4pm

5pm

6pm

7pm

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 Job Calendar interface. On the left is a 'Search Jobs' pane with a list of jobs. One job, 'JN-00528', is highlighted with a green box and the text 'When a job is open...'. On the right is a calendar grid for April 06 - 12, 2025. A green arrow points from the search pane to a job on the calendar 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. A green arrow points to the 'View' button (eye icon) next to the job ID. Another green arrow points to the 'Save & View Job' button at the bottom right.

## 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.

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

Salesforce Sans 12 B I U

**Mowing**

Job Description

- Mow front and back
- Weeding

Work Order Description

- Dog in backyard.

Repeat ☐ Reminder ☐

Cancel Save & View Job Save

2. If you are not one of the resources who will do the job, click on **Me** to deselect yourself.

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

Salesforce Sans 12 B I U

**Mowing**

Job Description

- Mow front and back
- Weeding

Work Order Description

- Dog in backyard.

Repeat ☐ Reminder ☐

Cancel Save & View Job Save



3. Click on each resource you want assigned to this appointment.

Event Details

Assign To: Ma AS JW KM SJ

Job: JN-00501 X

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: Salesforce Sans 12 B I U L

**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: Ma AS JW KM SJ

Job: JN-00501 X

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: Salesforce Sans 12 B I U L

**Mowing**  
Job Description

- Mow front and back
- Weeding

Work Order Description

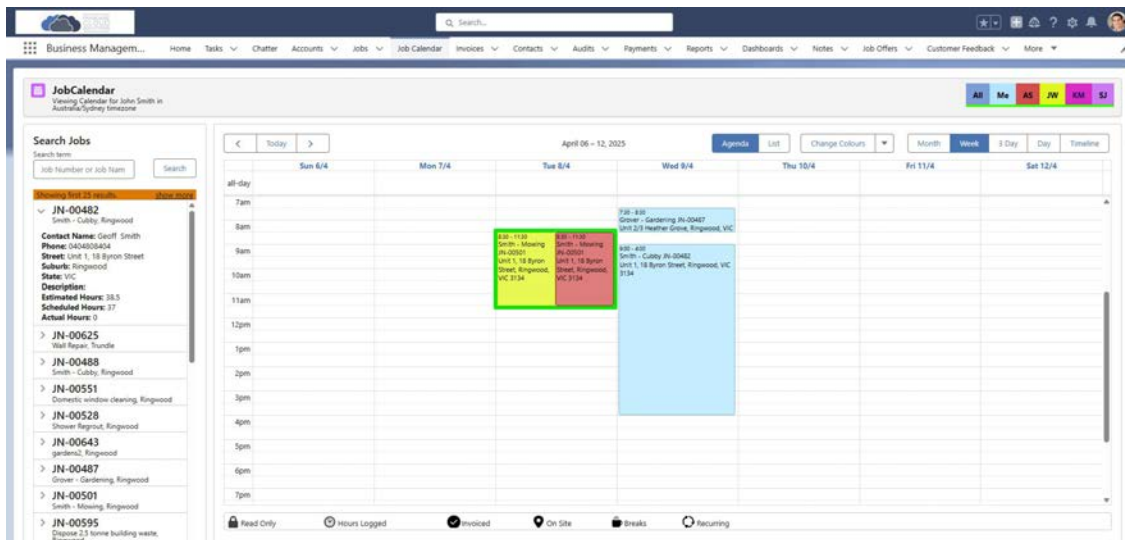
- Dog in backyard.

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 cxcviii. (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

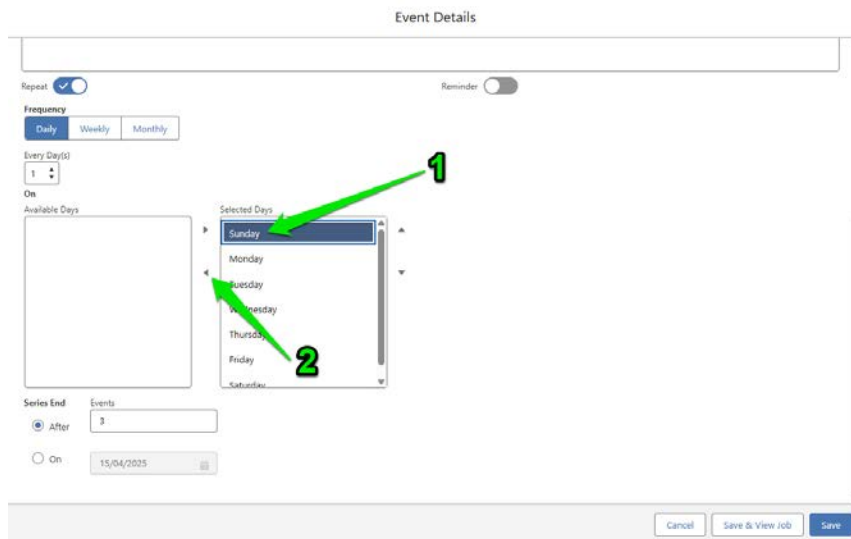
3. The **Repeat** pane opens.

The screenshot shows the 'Event Details' form. At the top right, 'Assign To:' lists 'Me', 'AS' (highlighted in red), 'JW', 'KM', and 'SJ'. The 'Job' field contains 'JN-00457' with a clear icon. The 'Location' field contains '12 Byron St, Ringwood, VIC 3134'. The 'Subject' field contains 'Hardy - Rear Patio JN-00457'. 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 'Repeat' checked, 'Frequency' set to 'Daily', 'Every Day(s)' set to '1', and 'On' set to 'Available Days'. A 'Reminder' toggle is also visible. At the bottom are 'Cancel', 'Save & View job', and 'Save' buttons.

4. Scroll down to see the all of the **Repeat** pane.

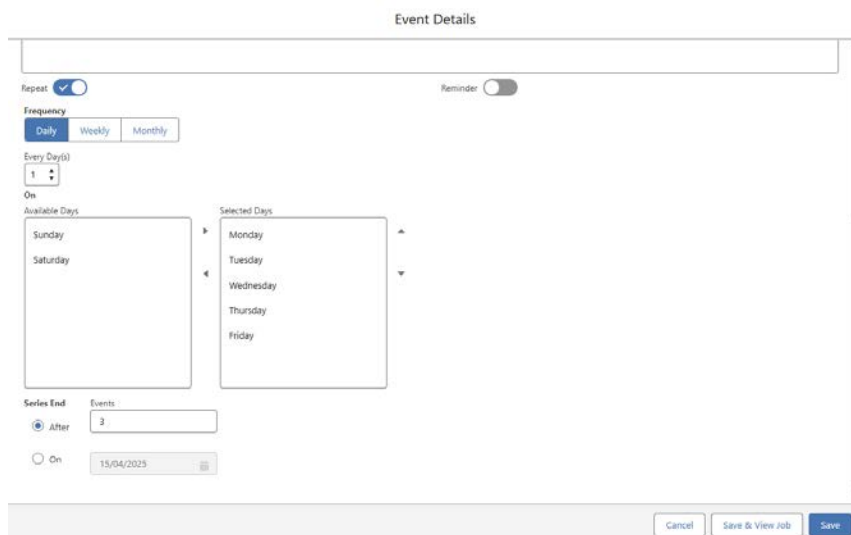
This screenshot shows the 'Event Details' form with the 'Repeat' pane fully expanded. The 'Repeat' section includes a 'Frequency' dropdown set to 'Daily', 'Every Day(s)' set to '1', and 'On' set to 'Available Days'. The 'Selected Days' list is visible, containing 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. The 'Series End' section is also visible, with 'After' selected and 'Events' set to '3'. The 'On' option is also present with a date field set to '15/04/2025'. The 'Reminder' toggle is visible. At the bottom are 'Cancel', 'Save & View job', and 'Save' buttons.

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.




The screenshot shows the 'Event Details' dialog box. The 'Repeat' checkbox is checked, and the 'Frequency' is set to 'Daily'. The 'Every Day(s)' dropdown is set to '1'. The 'On' section has 'Available Days' and 'Selected Days' lists. The 'Selected Days' list contains 'Sunday' and 'Monday'. A green arrow labeled '1' points to the 'Selected Days' list, and another green arrow labeled '2' points to the arrow to the left of 'Monday' in the 'Selected Days' list, indicating the action to click to deselect it. The 'Series End' section has 'After' selected with a value of '3', and 'On' is set to '15/04/2025'. At the bottom are 'Cancel', 'Save & View Job', and 'Save' buttons.

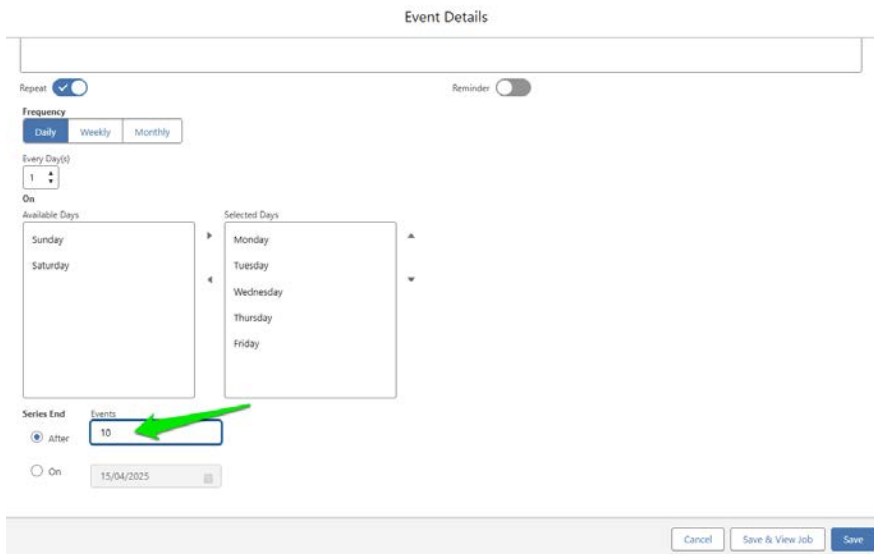
- b. Now do this for each other day your resources will not be working. The dialog will look something like this.



The screenshot shows the 'Event Details' dialog box after deselecting Sunday and Monday. The 'Selected Days' list now contains 'Monday', 'Tuesday', 'Wednesday', 'Thursday', and 'Friday'. The 'Available Days' list now contains 'Sunday' and 'Saturday'. The 'Series End' section remains the same. At the bottom are 'Cancel', 'Save & View Job', and 'Save' buttons.

6.  Because our resources will not be working on Saturday or Sunday, we remove Saturday and Sunday from the **Selected Days** list.

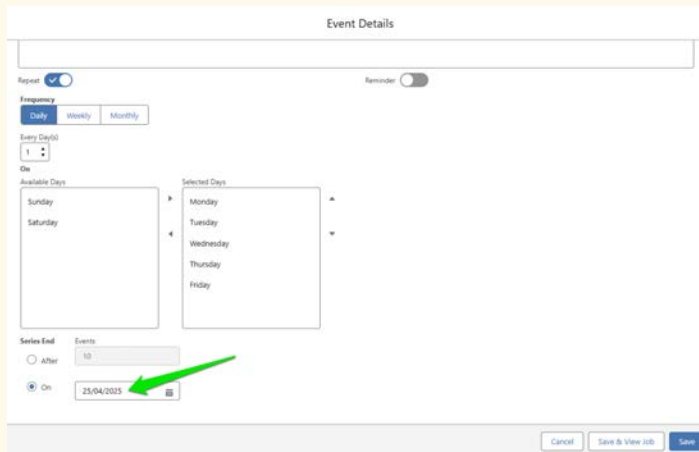
7. Now enter the number of days our resources will be working into the **Series End**, **After Events** field.



The screenshot shows the 'Event Details' form. At the top, there is a 'Repeat' checkbox (checked) and a 'Reminder' toggle (off). Below this is the 'Frequency' section with 'Daily', 'Weekly', and 'Monthly' buttons. The 'Every Day(s)' field is set to '1'. The 'On' section has two columns: 'Available Days' (Sunday, Saturday) and 'Selected Days' (Monday, Tuesday, Wednesday, Thursday, Friday). At the bottom, the 'Series End' section has two radio buttons: 'After' (selected) and 'On'. The 'After' option has a text input field labeled 'Events' containing the number '10', which is highlighted by a green arrow. The 'On' option has a date input field showing '15/04/2025'. At the bottom right 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 'Series End' section set to 'On'. The 'On' radio button is selected, and the date input field shows '25/04/2025', which is highlighted by a green arrow. The 'Events' field is now disabled and shows '10'. The 'Available Days' and 'Selected Days' sections remain the same. The bottom buttons are 'Cancel', 'Save & View Job', and 'Save'.

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  
Search term  
Job Number or Job Name Search

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 Regrout, Ringwood  
JN-00643 garden2, Ringwood  
JN-00487 Gutter - Gardening, 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

Sun 13/4 Mon 14/4 Tue 15/4 Wed 16/4 Thu 17/4 Fri 18/4 Sat 19/4

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 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: Salesforce Sans 12 B I U L R T A

Mowing front and rear lawns

Repeat: ☐ Reminder: ☐

Cancel Save

- 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: Salesforce Sans 12 Mowing front and rear lawns

Repeat: ☒ **Repeat** Reminder: ☐

Frequency: Daily Weekly Monthly

Every Week(s): 1

Series End: After 3

On: 07/12/2019

Cancel Save

- 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: Salesforce Sans 12 Mowing front and rear lawns

Repeat: ☒ **Repeat** Reminder: ☐

Frequency: Daily Weekly Monthly

Every Week(s): 3

Series End: After 3

On: 07/12/2019

Cancel Save



4. 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--

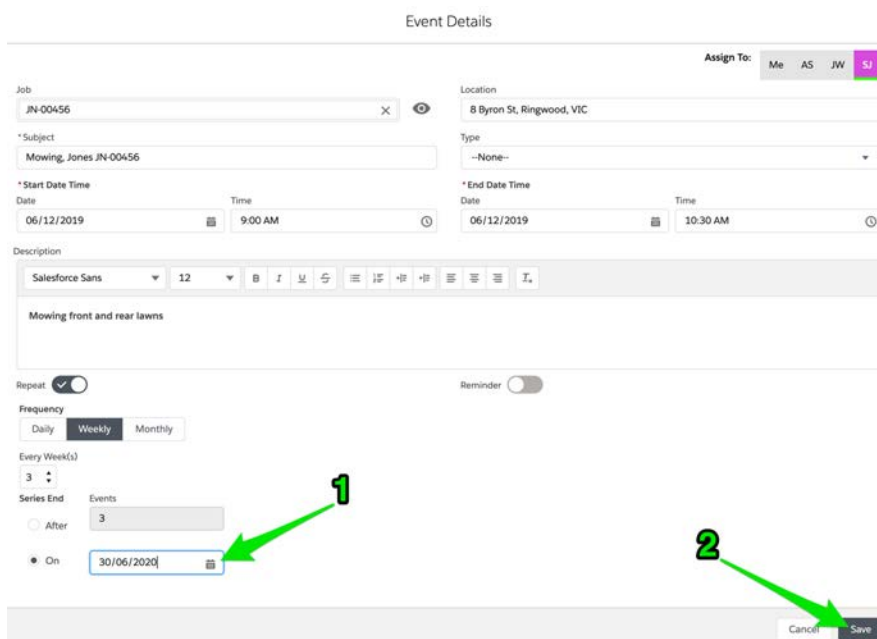
\* Start Date Time: 06/12/2019 9:00 AM \* End Date Time: 06/12/2019 10:30 AM

Description: Salesforce Sans 12 B I U S M A L T. Mowing front and rear lawns

Repeat: ☒ Frequency: Daily Weekly Monthly Every Week(s): 3 Series End: Events: 3 ☐ After ☒ On: 30/06/2020

Reminder: ☐

Cancel Save



## To set a repeating schedule every N months

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.

Event Details

Assign To: Me AS JW **SJ**

Job: JN-00456 Location: 8 Byron St, Ringwood, VIC

\* Subject: Mowing, Jones JN-00456 Type: --None--

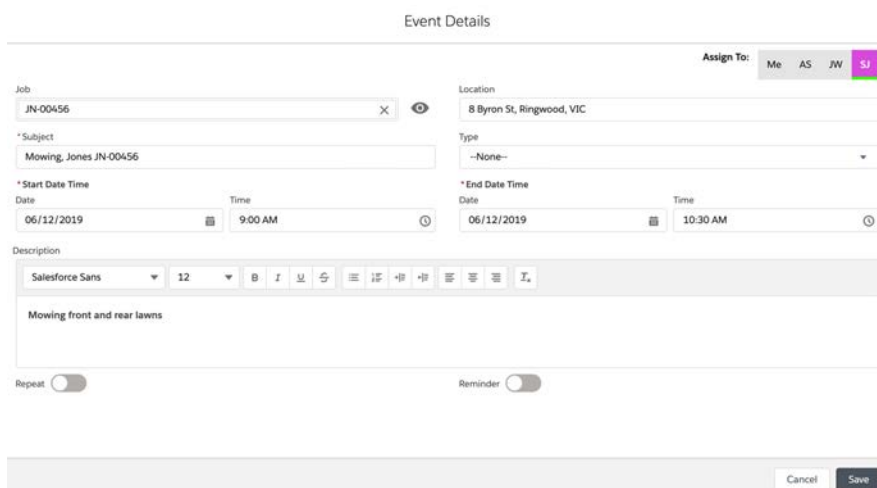
\* Start Date Time: 06/12/2019 9:00 AM \* End Date Time: 06/12/2019 10:30 AM

Description: Salesforce Sans 12 B I U S M A L T. Mowing front and rear lawns

Repeat: ☐ Frequency: Daily Weekly Monthly Every Week(s): 3 Series End: Events: 3 ☐ After ☐ On: 30/06/2020

Reminder: ☐

Cancel Save



2. 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: Salesforce Sans 12 Mowing front and rear lawns

Repeat: ☒ Frequency: Daily Weekly **Monthly** Reminder: ☐

Every Month(s): 1 ON: Current Date Is Last Day

Series End: After 3 On: 30/06/2020

Cancel Save

3. 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: Salesforce Sans 12 Mowing front and rear lawns

Repeat: ☒ 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: Daily Weekly **Monthly** Every Month(s): 2

ON: Every **1** First **2** Friday **3**

Series End: ☐ After 3 ☒ On 30/06/2020

Reminder: ☐

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: Daily Weekly **Monthly** Every Month(s): 2

ON: Every First Friday

Series End: ☒ After **1** 10 **2** ☐ On 30/06/2020

Reminder: ☐

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 X 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: Salesforce Sans 12 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 X 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: Salesforce Sans 12 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

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.

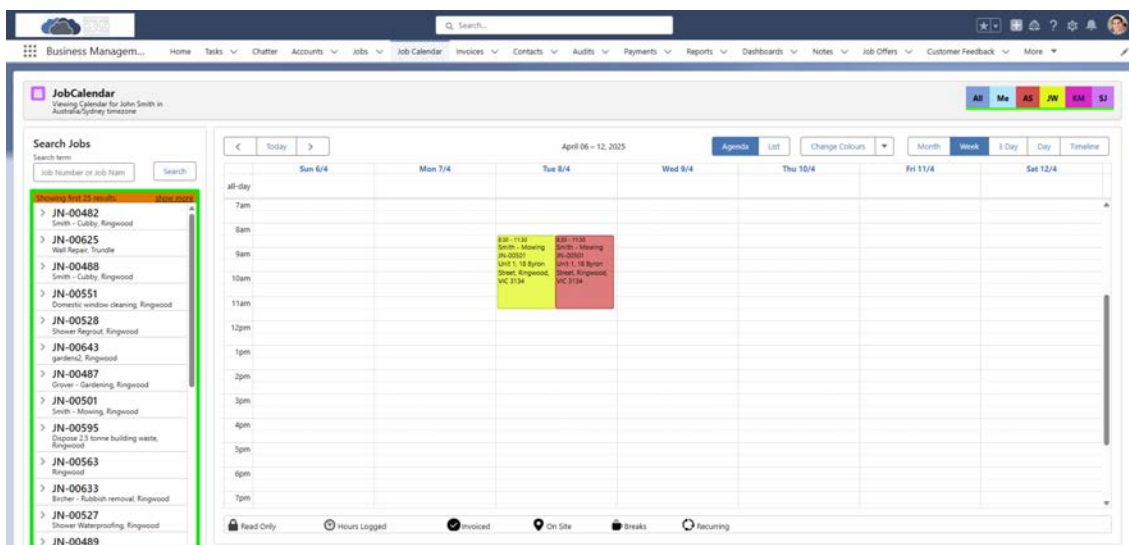
- ✓ Non-job appointments can include
  - » Private appointments
  - » Personal leave
  - » Annual holidays
  - » Lunch breaks

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.



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:

Type:

Start Date Time:

End Date Time:

Description:

Recurring options are only available on Job Events. Use standard calendar for recurring non job events. ☐ 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:

Location:

\*Subject:

Type:

Start Date Time:

End Date Time:

Description:

Recurring options are only available on Job Events. Use standard calendar for recurring non job events. ☐ Reminder

Cancel Save

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

7am

8am

9am

10am

11am

12pm

1pm

2pm

3pm

4pm

5pm

6pm

7pm

April 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

all-day

7am

8am

9am

10am

11am

12pm

1pm

2pm

3pm

4pm

5pm

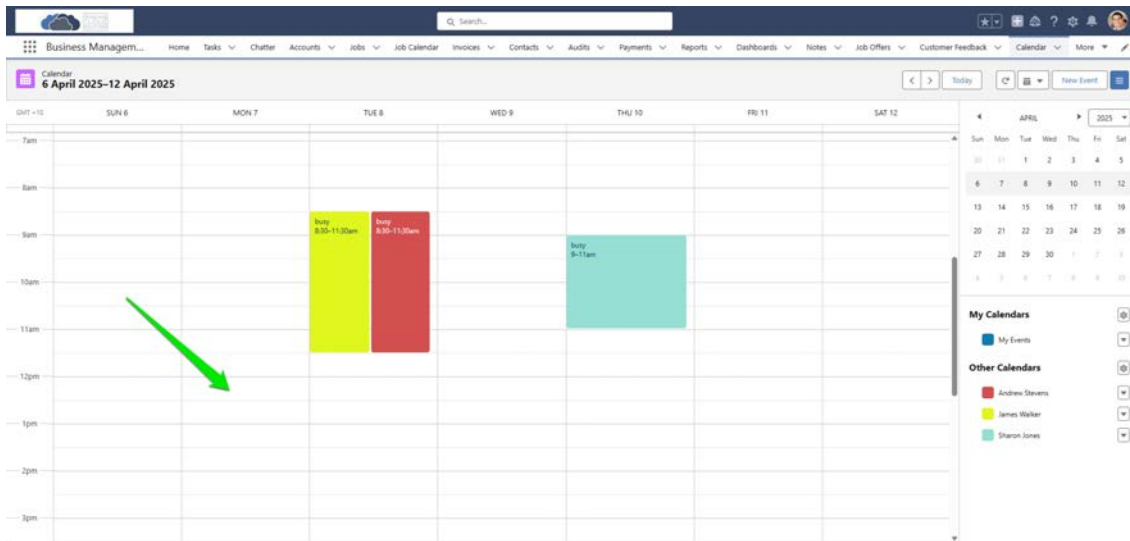
6pm

7pm

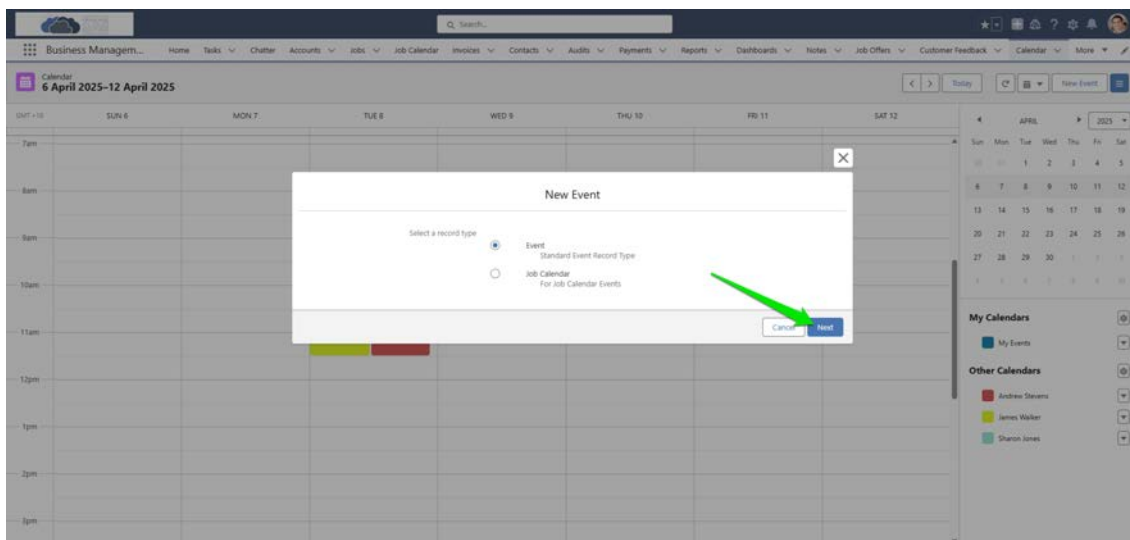
Read Only Hours Logged Invoiced On Site Breaks Recurring

## 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.

The screenshot shows the 'New Event: Event' form. The 'Calendar Details' section is expanded, showing fields for 'Assigned To' (John Smith), 'Related To' (Search Accounts...), 'Subject' (empty), 'Name' (Search Contacts...), 'All-Day Event' (checkbox), 'Private' (checkbox), '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), and 'Repeat' (checkbox). The 'Other Information' section is collapsed. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

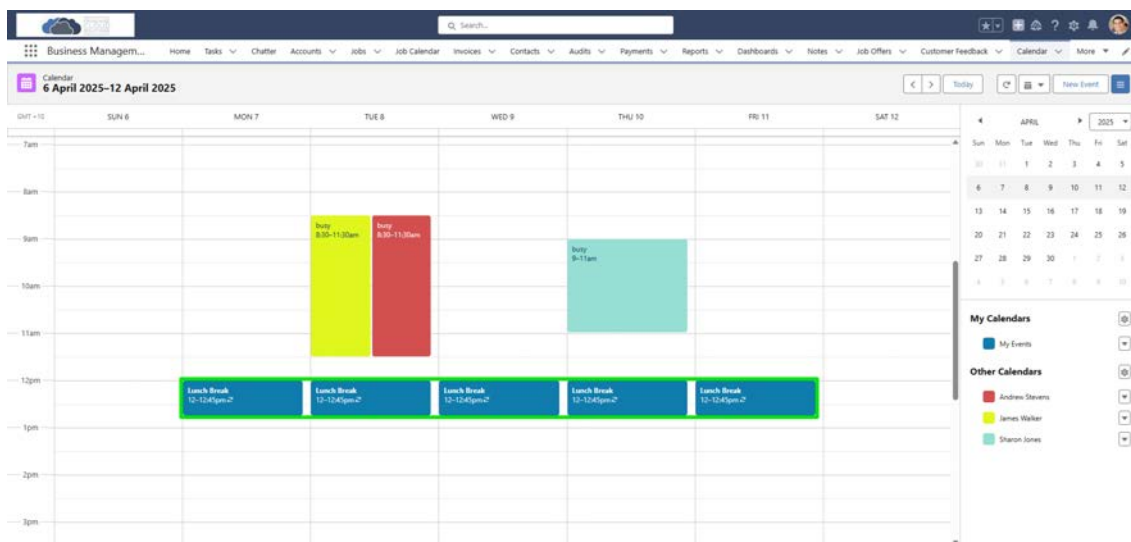
4. Adjust the details as you need, then choose **Type** and **Repeat**.

The screenshot shows the 'New Event: Event' form with annotations for step 4. The 'Subject' field is highlighted with a green box and labeled '1'. The 'End' time field is highlighted with a green box and labeled '2'. The 'Type' dropdown menu is highlighted with a green box and labeled '3'. The 'Repeat' checkbox is highlighted with a green box and labeled '4'. The 'Frequency' dropdown menu is also visible. The 'Show Time As' dropdown is set to 'Busy'. The 'Activity Currency' is set to 'AUD - Australian Dollar'. The 'Repeat' checkbox is checked. The 'Frequency' dropdown is set to 'Daily'. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

5. Now specify the **Frequency** and **End Date** for the series. Press **Save** when you're done.

The screenshot shows a form for creating an appointment series. At the top, there are dropdowns for 'Show Time As' (set to 'Busy') and 'Type' (set to 'Lunch Break'). Below these are 'Activity Currency' (AUD - Australian Dollar) and a 'Repeat' checkbox (checked). The 'Frequency' section has tabs for 'On', 'Weekly', 'Monthly', and 'Yearly', with 'Weekly' selected. A dropdown below shows 'Every Week'. A second 'On' dropdown shows the days of the week (M, Tu, W, Th, F, Sa, Su) with 'M' through 'F' selected. The 'Series End Date' section has three options: 'None', 'After' (selected), and 'On'. The 'After' option is set to '365' events. A date picker shows '07/07/2025'. Below this is an 'Other Information' section with a 'Location' field. The 'Description Information' section has a 'Description' field with a placeholder text 'Tip: Type Control + period to insert quick text.' At the bottom right are 'Cancel', 'Save & New', and 'Save' buttons. Four green callout numbers are present: '1' points to the 'Weekly' frequency tab, '2' points to the 'On' day-of-week dropdown, '3' points to the 'After 365 Events' end date option, and '4' points to the 'Description' field.

6. The appointment series is now placed on the Calendar.



This appointment series will also be visible in Job Calendar.

## Adjusting appointments

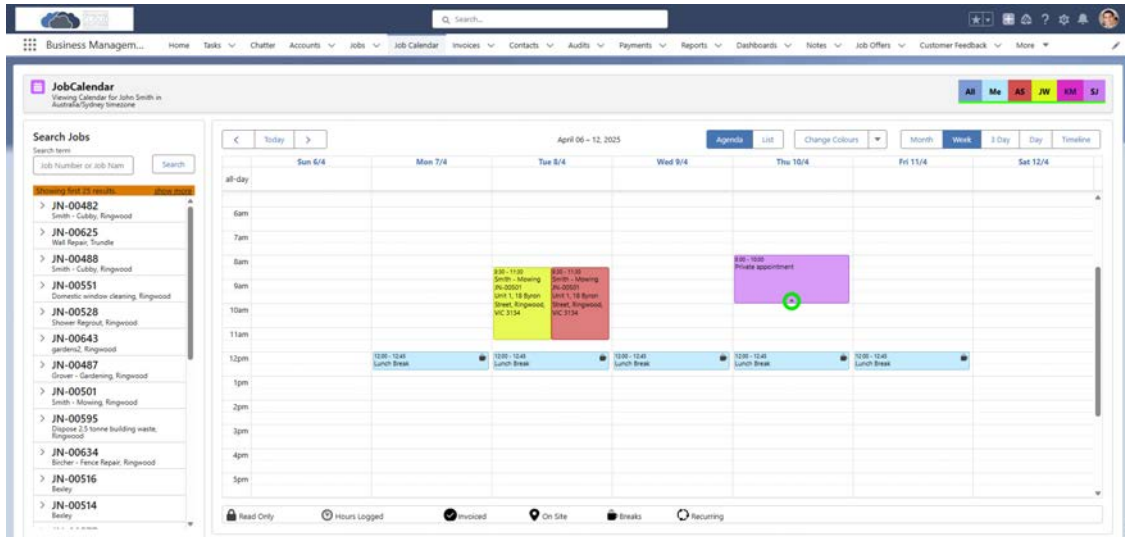
### How to change the length of an appointment

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.

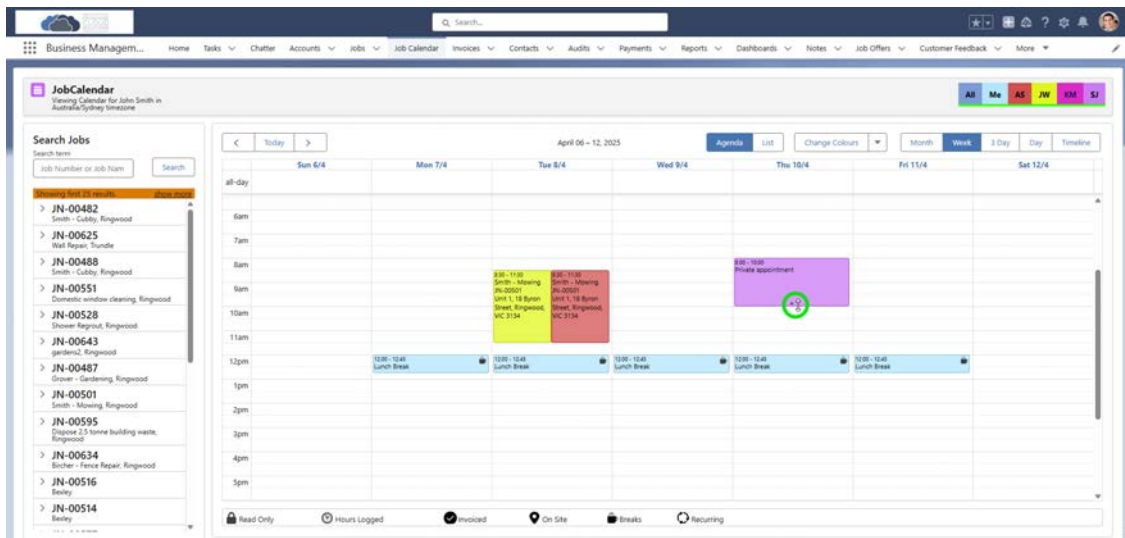
While you can do this within the Event dialog box, it is often quickest and easiest to shorten the length of an appointment by dragging and dropping the appointment on the calendar.

## To change the length of an appointment on the calendar

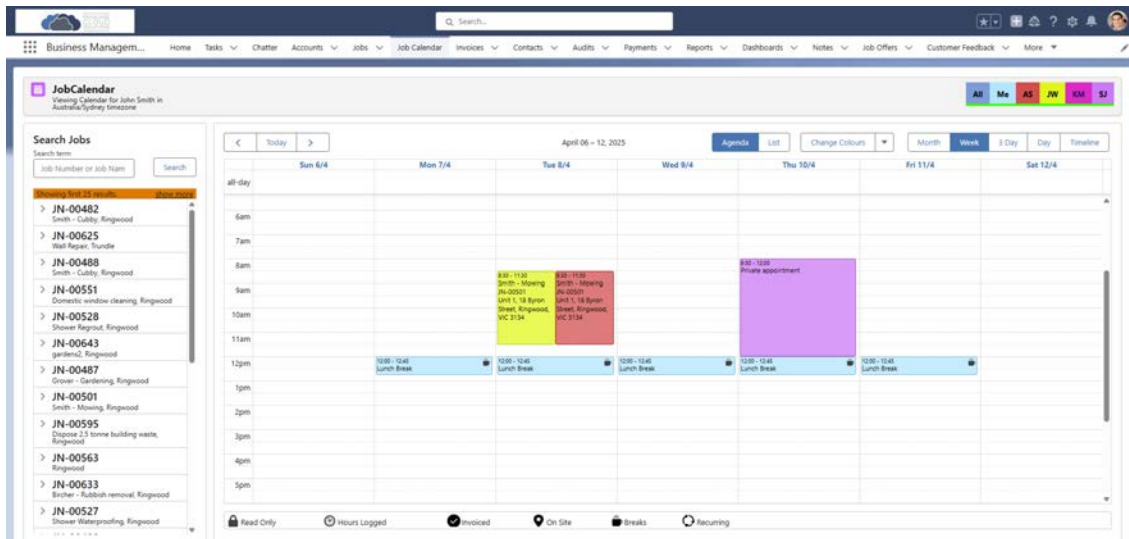
1. Hover your mouse over the top of a calendar appointment. A grab handle will appear at the bottom of the appointment.



2. Hover your mouse over the grab handle until it turns into a downward-facing arrow.



- Now press down using your left mouse button and drag the appointment to its new length.



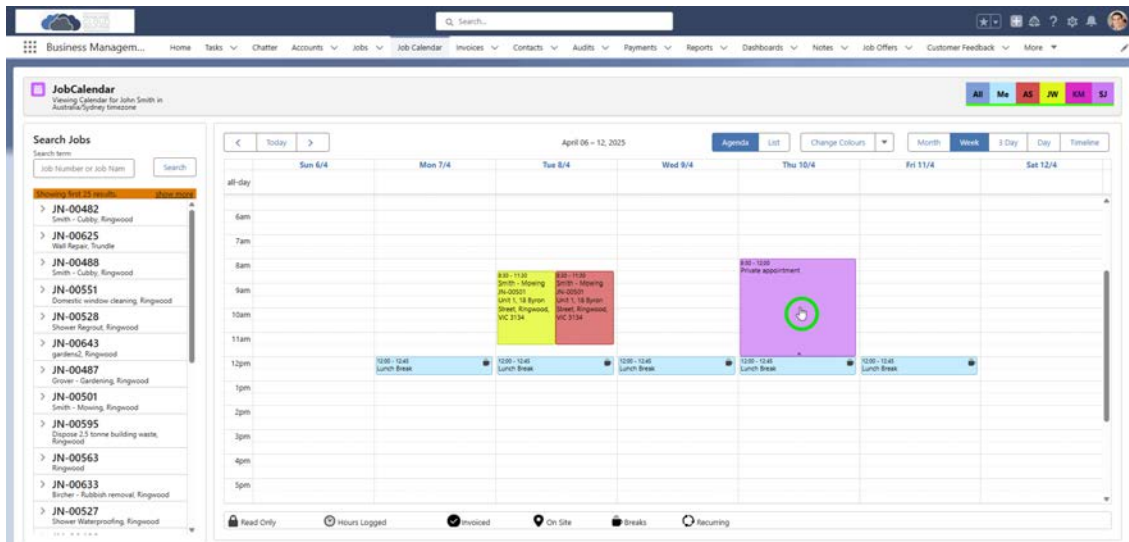
There is one extra step when the appointment is part of a series of repeating events, See “How to adjust appointments in a repeating series” on page ccxxx.

## How to move an appointment

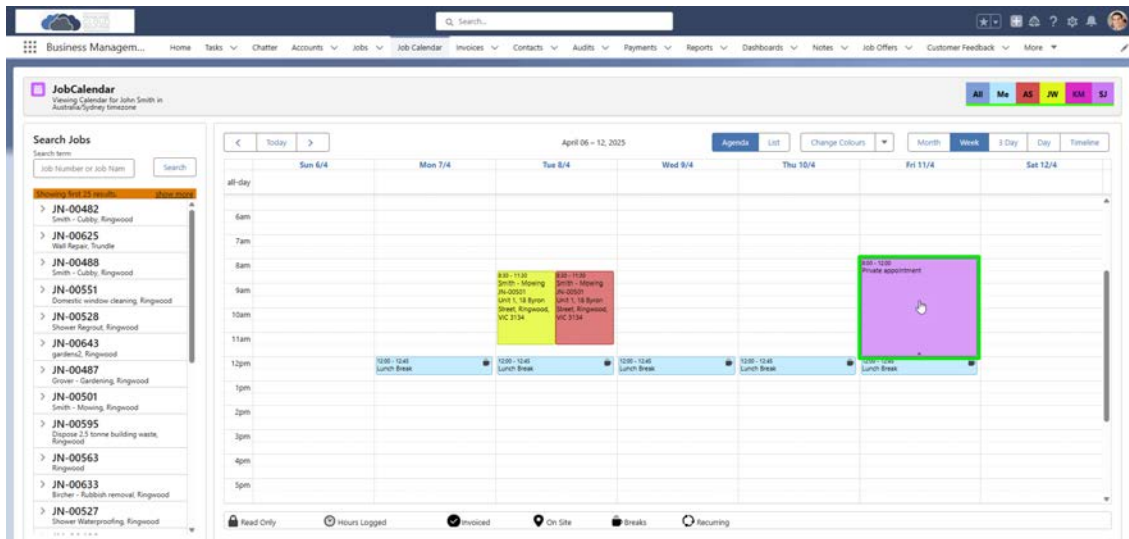
When an appointment is already on the calendar and you need to move it, doing so is as simple as drag and drop.

### 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.

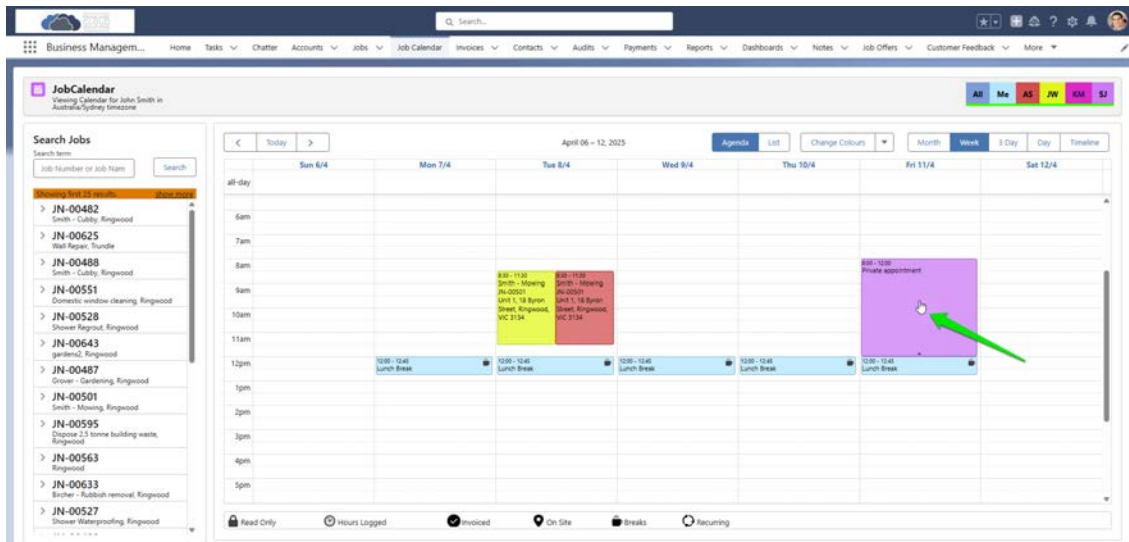


## How to delete an appointment

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.

**Event Details**  
**WARNING: This event is not related to a Job.**

Assign To: Me AS JW KM SJ

Job:

Location:

\*Subject:

Type:

Start Date Time: \*Date:  \*Time:

End Date Time: \*Date:  \*Time:

Description:

Recurring options are only available on Job Events. Use standard calendar for recurring non-job events.

Reminder: ☐

The event is now removed from the calendar.



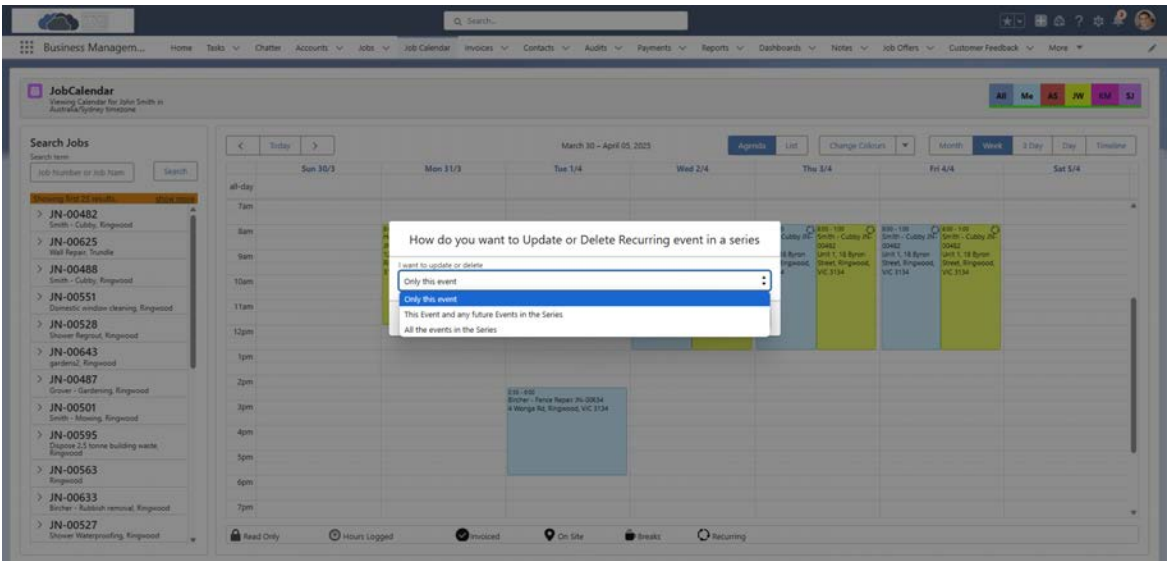
There is one extra step when the appointment is part of a series of repeating events, See “How to adjust appointments in a repeating series” on the facing page.

## 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.

FRANCHISE CLOUD SOLUTIONS

All

Search...

Business Managem...

Home

Chatter

Accounts

Jobs

Job Offers

Job Calendar

Invoices

Payments

Customer Feedback

More

JN-00548

Save

Save and Back

Invoice Job

Cancel

Customer Name

Est Labour Price

Est Material Price

Amount Inc Tax

Est Hours

Est Gross Margin

Tim Alford

\$360.00

\$300.00

\$660.00

4.50

32.95%

Fencing

Job Tasks (2)

Job Materials (2)

Fencing

Summary

Description

Work Order Description

High quality picket fencing.

Preparation of work site.

Disposal fee.

Installation of new picket fencing.

Fencing Summary

Labour Summary

Material Summary

A more complete financial analysis of the expected profitability of the job is also available within the Job's **Financial Summary** tab.

CCXXXiii

Business Management User Guide

## Tax Rate

58.26%

CCXXXIV

## Tax Rate

## 58.26%

## Business Management User Guide

## 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.

The screenshot shows the 'Business Management' software interface for Job JN-00249. The 'Actuals' pane is selected, showing a table with columns for 'Activity', 'Chatter', 'Actuals', and 'SMS'. A green arrow points to the 'Actuals' tab. The 'Actuals' pane also includes a 'Files (0)' section and a 'Notes (0)' section. The 'Actuals' pane is currently empty, showing only the 'Upcoming & Overdue' section with a message: 'No activities to show. Get started by sending an email, scheduling a task, and more.'

2. Enter the number of Labour Hours, the Hourly Cost and press **Save**.

The screenshot shows the 'Business Management' software interface for Job JN-00249. The 'Additional Actuals' form is displayed, showing fields for 'MATERIAL' and 'LABOUR'. The 'LABOUR' section is highlighted with a green box, showing 'Hours' as 4 and 'Cost' as 15. A green arrow points to the 'Save' button. The 'Additional Actuals' form also includes a 'Description' field and a 'Cost' field. The 'LABOUR' section is currently empty, showing only the 'Hours' and 'Cost' fields.



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-00249. The 'Financial Overview' section is highlighted with a green arrow. The 'Estimates vs Actuals' section is expanded, showing a comparison of estimated and actual values for various metrics. A green box highlights the 'Actual Hours' field, which is currently set to 4.00. The 'Additional Actuals' section on the right allows for entering material and labour costs.

Financial Overview	
Amount	\$541.8800
Tax Amount	\$0.0000
Amount Inc Tax	\$541.88
Tax Rate	

Estimates vs Actuals	
Estimated Gross Profit	\$279.38
Estimated Gross Margin	51.56%
Estimated Hours	2.50
Estimated Labour Cost	\$0.0000
Estimated Labour Price	\$187.50
Estimated Labour Profit	\$187.50
Estimated Material Cost	262.50
Estimated Material Price	\$354.38
Estimated Material Profit	\$91.88
Estimated COGS Value	\$262.50
Actual Gross Profit	\$51.25
Actual Gross Margin	45.07%
Actual Scheduled Hours	0.00
Actual Hours	4.00
Actual Labour Cost	60.00
Actual Labour Profit	\$127.50
Actual Hourly Profit	\$12.81
Actual Material Cost	
Actual Material Profit	
Actual COGS Value	\$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 'Actuals' pane is selected in the right-hand sidebar, indicated by a green arrow. The main area displays job details, including job name, number, status, and financial summary. The 'Actuals' pane shows a list of activities, with 'Kitchen cabinets' highlighted in green. The 'Actuals' pane also includes a 'Save' button.

2. Enter the Materials Description and Material Cost then press **Save**.

The screenshot shows the 'Business Management' software interface for job JN-00340. The 'Additional Actuals' form is displayed in the right-hand sidebar, with the 'MATERIAL' section highlighted in green. The form includes fields for 'Description', 'Cost', and 'Inc Tax'. The 'Description' field contains 'Kitchen cabinets' and the 'Cost' field contains '185'. A green arrow points to the 'Save' button. The 'LABOUR' section is also visible below the 'MATERIAL' section.

3. The entry of time will cause the **Estimates vs Actuals** section to show updated actuals.

The screenshot shows the 'Business Management' software interface. The 'Financial Summary' tab is selected, and the 'Estimates vs Actuals' section is expanded. A green box highlights the 'Actual Material Cost' of \$168.18. A green arrow points to the 'Financial Summary' tab.

Estimates	Actuals
Estimated Gross Profit	Actual Gross Profit
\$178.00	-\$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
\$172.50	\$500.00
Estimated Material Cost	Actual Hourly Profit
\$4.50	\$2.00
Estimated Material Price	Actual Material Cost
\$300.00	\$168.18
Estimated Material Profit	Actual Material Profit
\$295.50	\$111.62
Estimated COGS Value	Actual COGS Value
\$222.00	\$168.18
Estimated COGS Ratio	Actual COGS Ratio
27.75%	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.



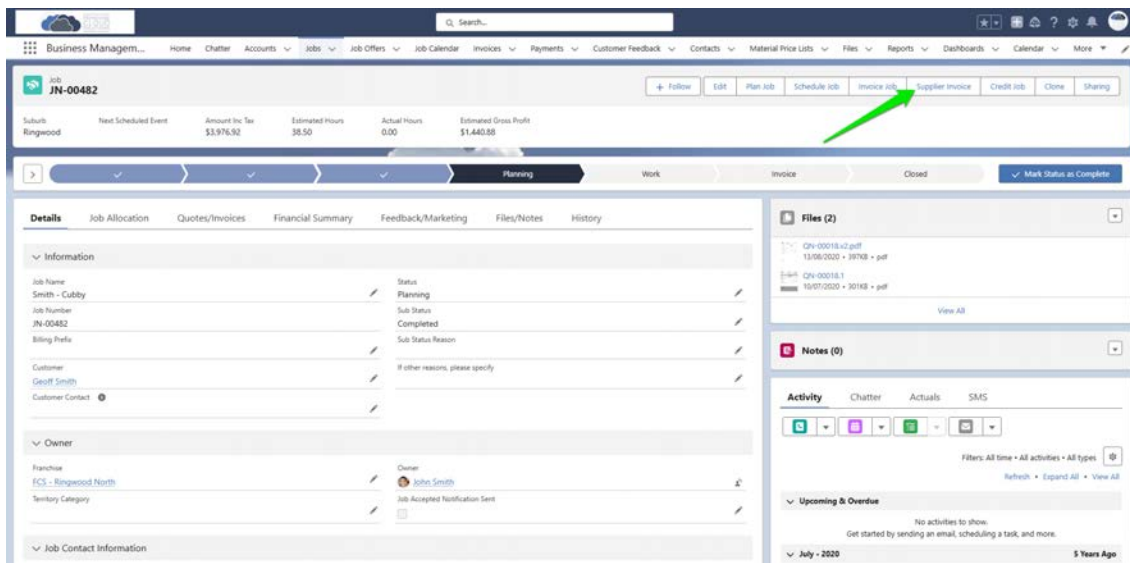
Any one particular supplier invoice may contain lines for multiple jobs. You can specify which supplier invoice lines are associated with the given job.



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: \$0.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	JN-00482 X Summary		\$0.00	<input checked="" type="checkbox"/>	\$0.00 +

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

Smith's Floorworld Ringwood

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	JN-00482 X Summary		\$0.00	<input checked="" type="checkbox"/>	\$0.00 +

Cancel Generate Invoice

4. 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: 89378 Status: Open

\*Invoice Date: 13/07/2020 \*Due Date: 20/07/2020

Reference: \*Account: Smith's Floorworld Ringwood

Tax Rate (%) 10 Invoice Amount \$250.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1 JN-00482	Timber	310 - Cost of Goods Sold	\$250.00	<input checked="" type="checkbox"/>	\$275.00

Cancel Generate Invoice

5. The system displays the generated supplier invoice.

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

Invoice 89378 + Follow Edit Clone Delete Send to Financial System Pull From Financial System

Account: Smith's Floorworld Ringwood Invoice Date: 13/07/2020 Amount Inc Tax: \$250.00 Status: Open

**Details** Related

Sync Status: Synced Owner: John Smith

Invoice Number: 89378 Amount: \$227.2727

Invoice Date: 13/07/2020 Tax Amount: \$22.73

Due Date: 20/07/2020 Amount Inc Tax: \$250.00

Type: Tax Exempt: ☐ Job:

Status: Open Has been emailed? ☐ Financial System Id:

Account: Smith's Floorworld Ringwood Reference:

**Invoice Sender**

Send Invoice PDF

**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.

6. Supplier invoice lines are displayed on the **Quotes/Invoices** tab.

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

Invoice 89378 + Follow Edit Clone Delete Send to Financial System Pull From Financial System

Account: Smith's Floorworld Ringwood Invoice Date: 13/07/2020 Amount Inc Tax: \$250.00 Status: Open

**Details** **Related**

**Invoice Line Items (1)** New

Summary	Amount	Amount Inc Tax	Account Code
Timber	\$227.2727	\$250.00	310

View All

**Payments (0)** New

**Syncs (1)** New

Sync Name: S230033

**Invoice Sender**

Send Invoice PDF

**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.



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 Manager interface for job JN-00482. The 'Financial Summary' tab is selected, showing a comparison between estimated and actual financial data. A green arrow points to the 'Financial Summary' tab. The 'Estimates vs Actuals' section includes metrics such as Estimated Gross Profit, Estimated Gross Margin, Estimated Hours, Estimated Labour Cost, Estimated Labour Price, Estimated Labour Profit, Estimated Hourly Profit, Estimated Material Cost, Estimated Material Price, Estimated Material Profit, Estimated COGS Value, and Estimated COGS Ratio. The 'Actual Material Cost' is highlighted with a green box and shows a value of \$250.00. The bottom section shows the 'Financial Analysis' for job Smith - Cubby, also with the 'Actual Material Cost' highlighted in a green box showing \$250.00.



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 Business Management software interface for Job JN-00479. The top navigation bar includes tabs like Home, Chatter, Accounts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Contacts, Material Price Lists, Files, Reports, Dashboards, Calendar, and More. The main content area shows the Financial Summary tab, which is divided into several sections: Financial Overview, Estimates vs Actuals, Feedback/Marketing, Files/Notes, and History. The Financial Overview section shows a table with columns for Amount, Amount Inc Tax, Estimated Hours, Actual Hours, and Estimated Gross Profit. The Estimates vs Actuals section shows a table with columns for Estimated Gross Profit, Actual Gross Profit, Estimated Gross Margin, Actual Gross Margin, Estimated Hours, Actual Scheduled Hours, Estimated Labour Cost, Actual Hours, Estimated Labour Price, Actual Labour Cost, Estimated Labour Profit, Actual Labour Profit, Estimated Material Cost, and Actual Hourly Profit. A green arrow points to the Financial Overview section, and a green box highlights the Actual Labour Cost field in the Estimates vs Actuals section.



### 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 Job Calendar 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: Doors - Ringwood North Status: Planning  
 Job Number: JN-00479 Sub Status: In Progress  
 Billing Profile: Sub Status Reason: If other reasons, please specify  
 Customer: Keryn Miller If other reasons, please specify  
 Customer Contact: 0421788574

Owner

Franchise: FCS - Ringwood North Owner: John Smith  
 Territory Category: Job Accepted Notification Sent: [X]

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: 4 Cost: 45 Inc Tax: Save

Business Management... Home Chatter Accounts Jobs Job Offers 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: Sub Status: In Progress  
 Request Type: Sub Status Reason: If other reasons, please specify  
 Due Date: Job Accepted Notification Sent: [X]  
 Job Contact Information

Salutation: Force Street Address: [X]  
 First Name: Street:

Activity Chatter Actuals SMS

Additional Actuals

Material Description: Material Cost: Inc Tax: Save

Labour Hours: 4 Hourly Cost: 45 Inc Tax: Save





# CHAPTER 8

## Working with Invoices, Payments & Credit Notes

Understanding invoices, payments & credit notes .....	ccxlvi
Invoicing a job .....	ccxli
How to generate a full invoice .....	ccxli
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
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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
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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.

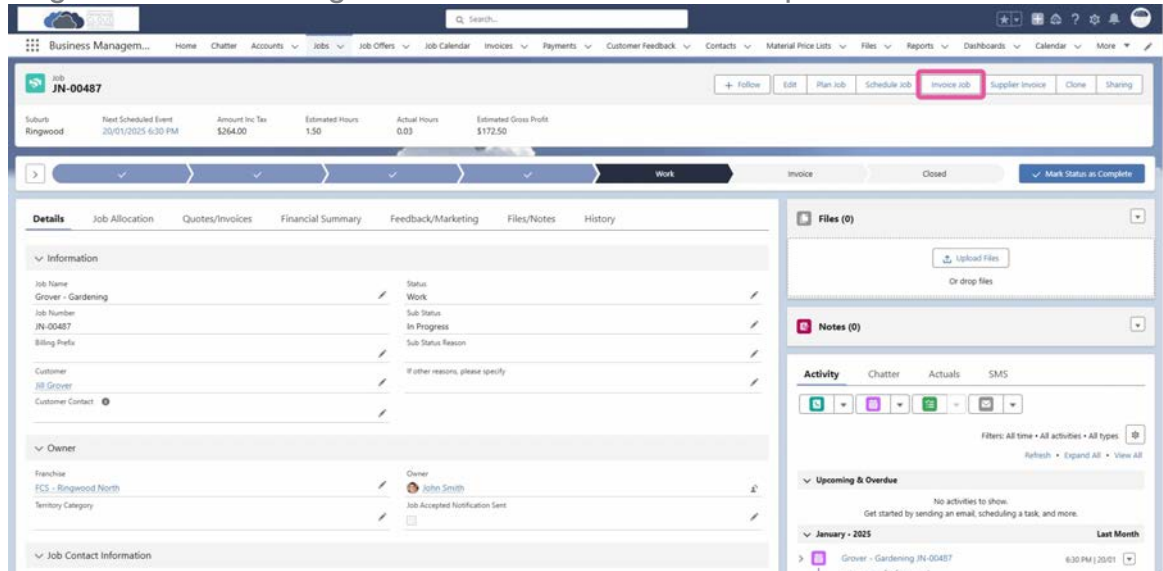
Applying a credit note against an invoice is called a **credit allocation**. When you allocate credit, you are reducing the amount of money owed against that invoice (just like recording a payment against the invoice). Allocations are made in FranchiseOps and are synced to Xero.

# Invoicing a job

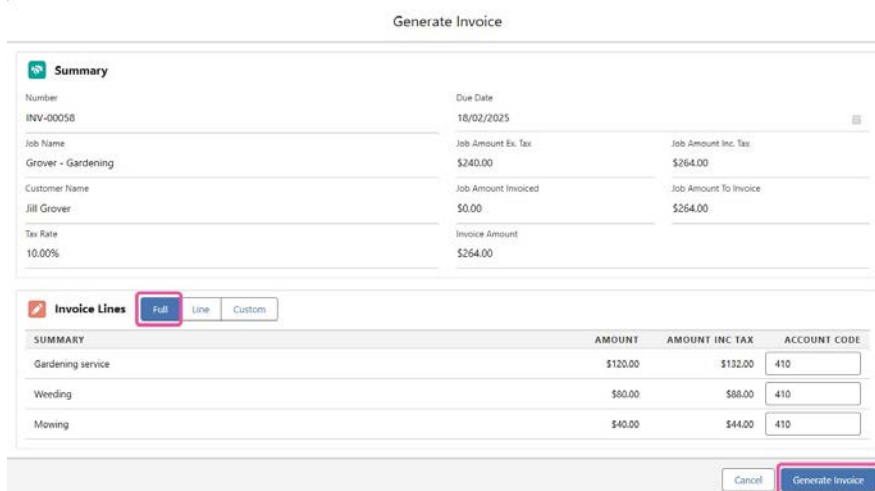
## How to generate a full invoice

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**.



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.

3. When you are ready to send the invoice to your customer, press **Send Invoice PDF**.

The screenshot shows the 'Business Management' software interface. The top navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', 'Material Price Lists', 'Files', 'Reports', 'Dashboards', 'Calendar', and 'More'. The main content area displays the 'Invoice Sender' dialog for invoice 'INV-00058'. The dialog has a 'Send Invoice PDF' button highlighted with a red box. Below this, there are sections for 'Financial System Information' and 'Activity'. The 'Financial System Information' section includes 'Sync Status' (set to 'Sync'), 'Financial System Id', and a 'View Invoice in Financial System' link. The 'Activity' section shows a 'Chatter' feed with filters for 'All time', 'All activities', and 'All types'. The 'Upcoming & Overdue' section indicates 'No activities to show' and provides instructions on how to get started.

Details	
Invoice Number	INV-00058
Type	Full
Stage	Open
Owner	John Smith
Status	Open

Invoice Details	
Amount	\$240.0000
Tax Amount	\$24.00
Amount Inc Tax	\$264.00
Tax Exempt	<input type="checkbox"/>
Invoice Date	18/02/2025
Due Date	18/02/2025
Reference	
Has been emailed?	<input type="checkbox"/>

Related To	
Account	JB Grover
Job	JN-00487

4. 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.

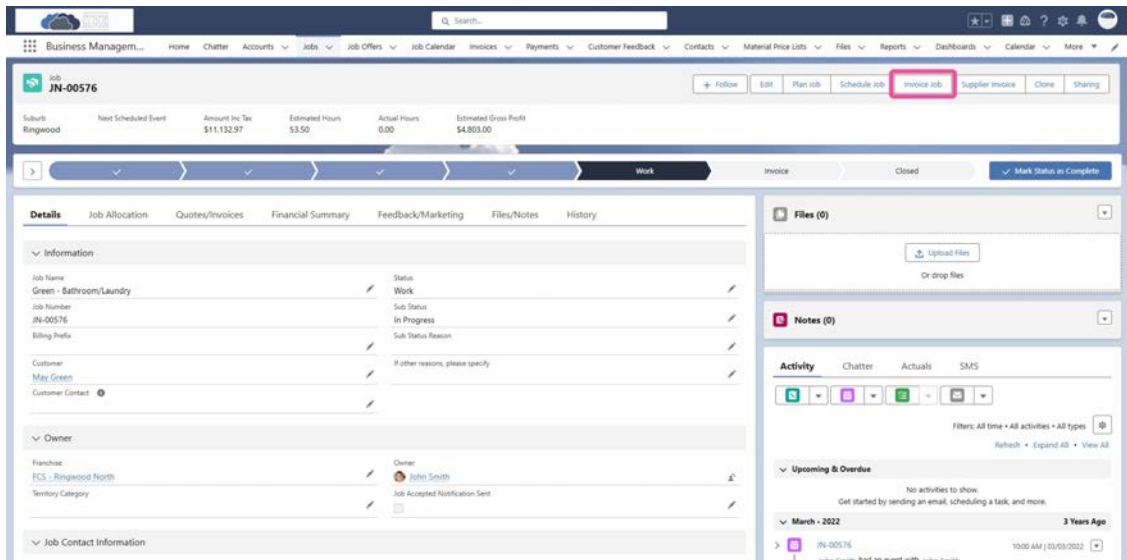
# How to generate custom invoices

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**.

Generate Invoice

**Summary**

Number	Due Date	
INV-00059	19/02/2025	
Job Name	Job Amount Ex. Tax	Job Amount Inc. Tax
Green - Bathroom/Laundry	\$10,120.88	\$11,132.97
Customer Name	Job Amount Invoiced	Job Amount To Invoice
May Green	\$0.00	\$11,132.97
Tax Rate	Invoice Amount	
10.00%	\$11,132.97	

☒ Invoice Lines

☐ Full

☒ Line

☐ Custom

SUMMARY	AMOUNT	AMOUNT INC TAX	ACCOUNT CODE
Laundry Bathroom	\$2,554.33	\$2,809.76	410
Main bathroom inc. VJ panelling	\$5,134.75	\$5,648.23	410
Bathroom Floor	\$1,056.80	\$1,162.48	410
Plumbing	\$1,375.00	\$1,512.50	410

Cancel

Generate Invoice

3. 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.

4. Press **Send Invoice PDF**.

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

**Invoice INV-00059** Edit Pay Manually Pay with Square Send to Financial System Credit Invoice

Account: May Green Invoice Date: 19/02/2025 Amount Inc. Tax: \$5,484.74 Status: Open

**Details** Payments & Credits History

**Details**

Invoice Number: INV-00059 Owner: John Smith

Type: Line Item Status: Open

Stage:

**Invoice Details**

Amount: \$4,986.1300 Invoice Date: 19/02/2025

Tax Amount: \$498.61 Due Date: 19/02/2025

Amount Inc. Tax: \$5,484.74 Reference:

Tax Exempt: Has been emailed?

**Related To**

Account: May Green Job: JN-00576

**Invoice Sender**

**Send Invoice PDF**

**Financial System Information**

Sync Status:

Financial System Id:

View Invoice in Financial System:

**Activity** Chatter

Filters: All time • All activities • All types

**Upcoming & Overdue**

No activities to show.

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

No past activity. Past meetings and tasks marked as done show up here.

The **Compose Email** box appears.

5. 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.



1. From the **Job**, press **Invoice Job**.



## 2. Select Custom.

ccliii

- 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**

FullLineCustom

Quick %50.7343%

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
Invoice for Green - Bathroom/Laundry	\$134,7545	<input type="checkbox"/>	\$5,648.23	410 +

CancelGenerate Invoice

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.

**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: \$750.00 | Est Material Price: \$390.00 | Amount Inc Tax: \$1,254.00 | Est Hours: 8.00 | Est Gross Margin: -5.98%

**Tiling** | Tiling - Terracotta Tiles | + | -

**Job Tasks (3)** | New

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 (4)** | New

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

**Tiling** | Summary | Include

Description: Salesforce Sans | 12 | B | I | U | ...

Retiling damaged section of the roof.

Work Order Description: Salesforce Sans | 12 | B | I | U | ...

**Tiling Summary**

Amount	Est Margin	Hours
\$1,190.00	0%	8

Cost	Profit	Total
\$1,208.20	-\$18.20	\$1,309.00

**Labour Summary**

Calculated

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

Estimated Labour Override: Enter a value

**Material Summary**

Calculated

Cost	Amount	Profit
\$758.20	\$886.00	\$127.80

Estimated Material Override: \$390.00

3. Press **Save**, then **Invoice Job**.

**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: \$750.00 | Est Material Price: \$390.00 | Amount Inc Tax: \$1,254.00 | Est Hours: 8.00 | Est Gross Margin: -5.98%

**Tiling** | Tiling - Terracotta Tiles | + | -

**Job Tasks (3)** | New

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 (4)** | New

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

**Tiling** | Summary | Include

Description: Salesforce Sans | 12 | B | I | U | ...

Retiling damaged section of the roof.

Work Order Description: Salesforce Sans | 12 | B | I | U | ...

**Tiling Summary**

Amount	Est Margin	Hours
\$1,190.00	0%	8

Cost	Profit	Total
\$1,208.20	-\$18.20	\$1,309.00

**Labour Summary**

Calculated

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

Estimated Labour Override: Enter a value

**Material Summary**

Calculated

Cost	Amount	Profit
\$758.20	\$886.00	\$127.80

Estimated Material Override: \$390.00



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 'Business Management' software interface. The top navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Calendar', 'Invoices', 'Payments', 'Customer Feedback', 'Contacts', 'Material Price Lists', 'Files', 'Reports', 'Dashboards', 'Calendar', and 'More'. The main content area is for Job JN-00456, with tabs for 'Details', 'Job Allocation', 'Quotes/Invoices' (selected), 'Financial Summary', 'Feedback/Marketing', 'Files/Notes', and 'History'. The 'Quotes/Invoices' tab shows 'Quote Information' and 'Job Line Items (1)'. The 'Invoice Information' section is expanded, showing fields for 'Invoice Number', 'Date Invoiced', 'Invoice', 'Amount Invoiced', and 'Your Reference'. The 'Invoice Stage Plan' field is highlighted with a red box.

2. Click the **pencil icon** to edit the field.
3. Click the **dropdown arrow** and select your stage plan.

The screenshot shows the 'Business Management' software interface with the 'Invoice Stage Plan' dropdown menu open. The dropdown menu is located in the 'Invoice Information' section, and it shows the following options: 'None', '10/40/40/10', '30/70/10', and '10/90'. The '10/40/40/10' option is highlighted with a red box. The 'Invoice Stage Plan' field is also highlighted with a red box.

#### 4. Click **Save**.

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

Job JN-00456 + Follow Edit Plan Job Schedule Job Invoice Job Supplier Invoice Clone Sharing

Payment Terms: On Completion COGS Entered: ☐

Job Line Items (1) 1 item • Updated a few seconds ago

Job Line It...	Summary	Description	Amount	Amount In...	Include
1	8/18/2024	Single house free standing scaffolding	Supply and install single house free standing scaffolding	\$909.09	\$1,000.00

View All

Invoice Information

Invoice Number:  Date Invoiced:

Invoice: Search Invoices...  Invoice Stage Plan: 10/40/40/10

Amount Invoiced:  Your Reference:

Amount Invoiced Inc Tax:  Payment Terms: On Completion

Balance Owed:  Interest Free Payment Options: ☐

Cancel Save

### 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.

Generate Invoice

Summary

Number: INV-00057 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: \$0.00 Job Amount To Invoice: \$1,000.00

Tax Rate: 10.00% Invoice Amount: \$100.00

Invoice Lines Full Line Custom Stage 1 10.00000%

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
Invoice for Scaffolding, Jones	90.9091	<input type="checkbox"/>	\$100.00	410

Cancel Generate Invoice



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 cclxix. 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**.

4. The default is Stage 2 and the second percentage of the Job Amount. For example, 10/40/40/10.

Generate Invoice				
Summary				
Number	Due Date			
INV-00058	18/02/2025			
Job Name	Job Amount Ex. Tax	Job Amount Inc. Tax		
Scaffolding, Jones	\$909.09	\$1,000.00		
Customer Name	Job Amount Invoiced	Job Amount To Invoice		
Greg Jones	\$100.00	\$900.00		
Tax Rate	Invoice Amount			
10.00%	\$400.00			
Invoice Lines				
Full Line Custom				
Stage 2 40.0000%				
SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
Invoice for Scaffolding, Jones	963.6364	<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.

5. Click **Generate Invoice**.
- Using the 10/40/40/10 plan, you have now invoiced 50% of the job.
6. 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	Due Date			
INV-00058	18/02/2025			
Job Name	Job Amount Ex. Tax	Job Amount Inc. Tax		
Scaffolding, Jones	\$909.09	\$1,000.00		
Customer Name	Job Amount Invoiced	Job Amount To Invoice		
Greg Jones	\$100.00	\$900.00		
Tax Rate	Invoice Amount			
10.00%	\$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.



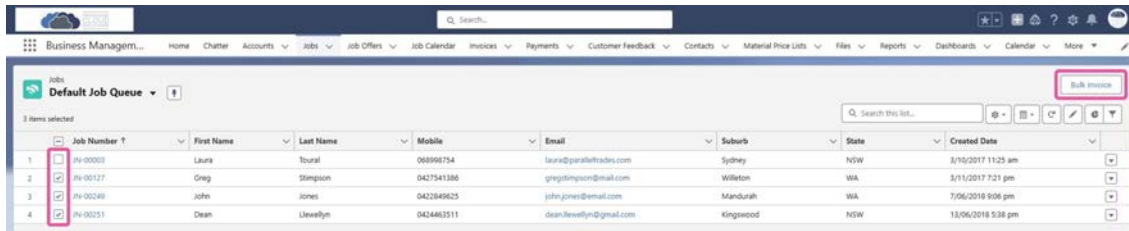
Bulk invoicing is not available for jobs that already have an invoice.

The invoices will be sent to the email on the account customer contact using the current default email template.



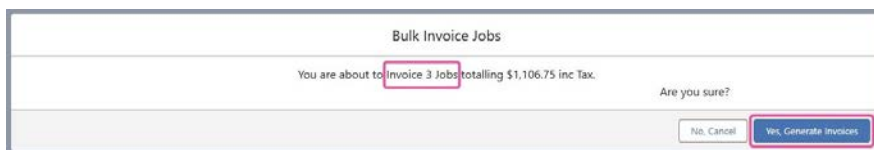
## To create and send customer invoices in bulk

1. Starting from a Jobs list view, select the checkbox of the jobs you want to invoice, then select **Bulk Invoice**.

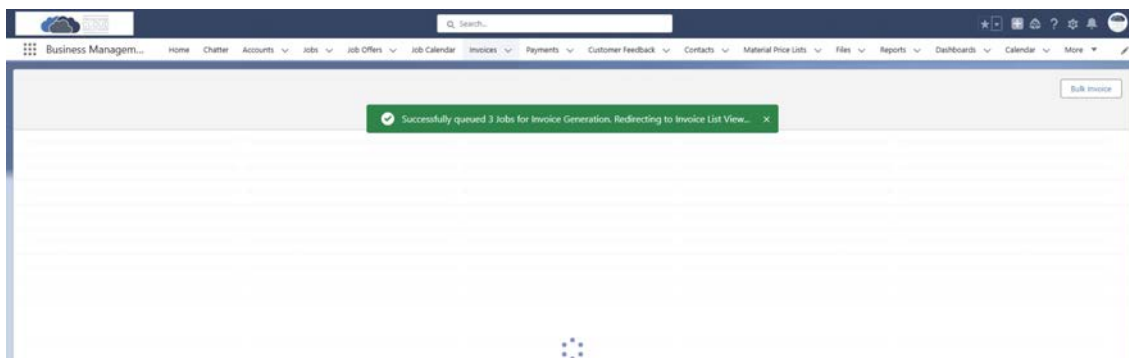


The **Bulk Invoice Jobs** dialog box appears.

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 screenshot shows the 'Jonathan Bircher' account page. The 'Invoice Account' button is highlighted in the top right corner. The page displays account details, contact information, and a list of activities.

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**.

The screenshot shows the 'Generate Invoice' dialog box. The 'Full' option under 'Invoice Lines' is selected. The summary section shows the invoice number, due date, and amounts.

SUMMARY	AMOUNT	AMOUNT INC TAX	ACCOUNT CODE
JN-00633 - Bircher - Rubbish removal	\$221.88	\$244.07	410
JN-00634 - Bircher - Fence Repair	\$697.50	\$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

Tax Rate  
10.00%

Account Amount Ex. Tax  
\$919.38

Account Amount Inc. Tax  
\$1,011.32

Account Amount To Invoice  
\$1,011.32

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

Cancel

Generate Invoice

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

Tax Rate  
10.00%

Account Amount Ex. Tax  
\$919.38

Account Amount Inc. Tax  
\$1,011.32

Account Amount To Invoice  
\$1,011.32

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

Cancel

Generate Invoice

## 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

Tax Rate  
10.00%

Account Amount Ex. Tax  
\$919.38

Account Amount Inc. Tax  
\$1,011.32

Account Amount To Invoice  
\$1,011.32

Invoice Amount  
\$1,011.32

**Invoice Lines**

Full

Line

**Custom**

Quick %

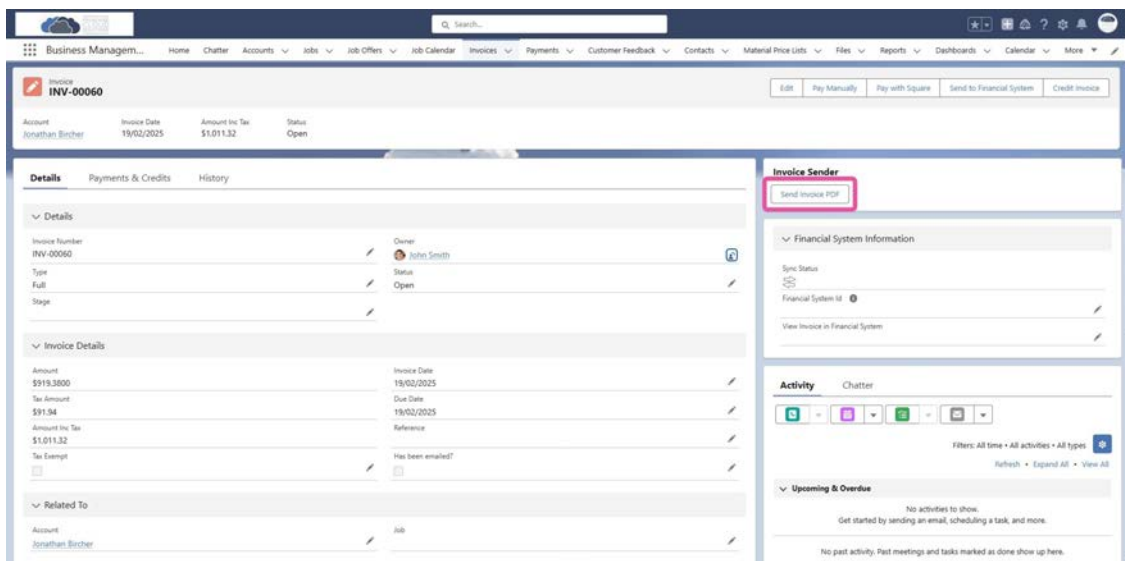
100.0000%

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
Invoice for Jonathan Bircher	919.3818	<input type="checkbox"/>	\$1,011.32	410

Cancel

Generate Invoice

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.

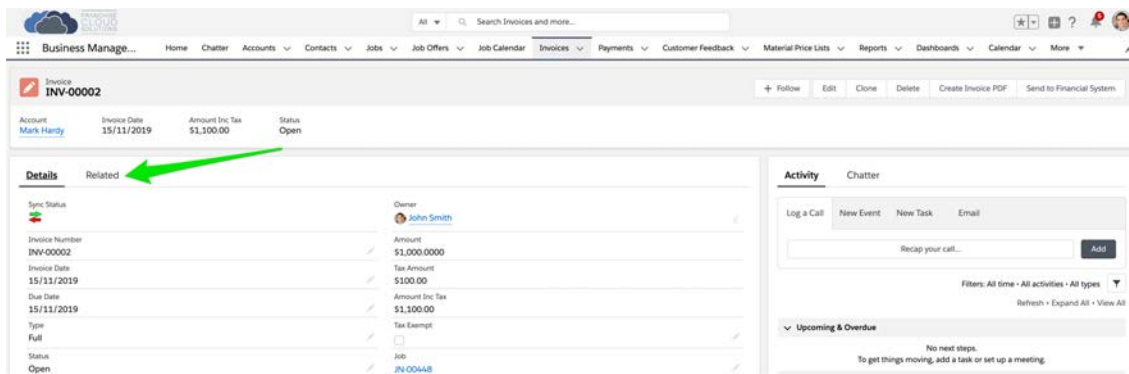
<b>Job</b>	<b>Invoice</b>	<b>Procedure</b>
Standard Job	Invoice not yet sent	"How to overwrite an invoice" below
Standard or Repeating Job	Invoice is sent but has no payments	"How to void an issued invoice" on page cclxviii
Standard or Repeating Job	Invoice has at least one payment	"Issuing & allocating credit notes" on page cclxxviii

## **How to overwrite an invoice**

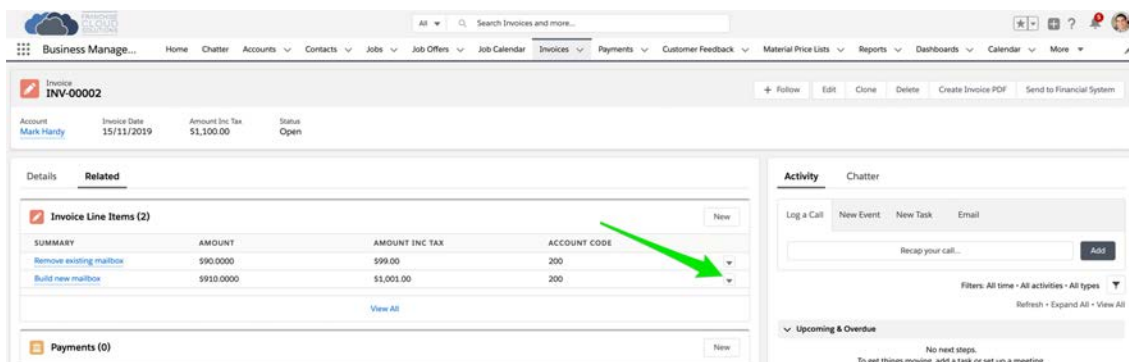
For jobs that are not marked as repeating, you can overwrite an invoice if it is not yet sent to the customer.

## To overwrite an invoice

1. Locate the **Invoice** in Salesforce and choose the **Related** tab.

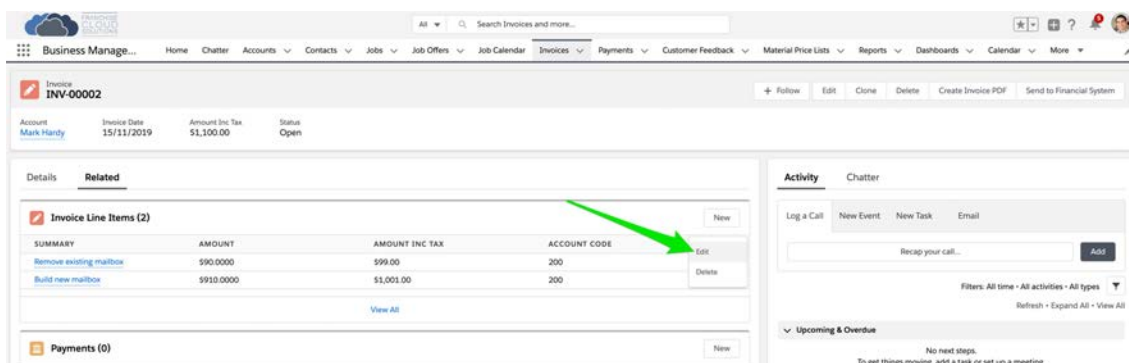


2. From the **Related** tab, located the **Invoice Line Items** section, and select the **more actions** drop-down.



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.



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...-a783-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

Invoice Number  
INV-00002

Invoice Date  
15/11/2019

Due Date  
15/11/2019

Type  
Full

Status  
Open

Owner  
John Smith

Amount  
\$1,140.0000

Tax Amount  
\$114.00

Amount Inc Tax  
\$1,254.00

Tax Exempt  
☐

Job  
JV-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

Invoice Number  
INV-00002

Invoice Date  
15/11/2019

Due Date  
15/11/2019

Type  
Full

Status  
Open

Owner  
John Smith

Amount  
\$1,140.0000

Tax Amount  
\$114.00

Amount Inc Tax  
\$1,254.00

Tax Exempt  
☐

Job  
JV-00448

Activity Chatter

Log a Call New Event New Task Email

Recap your call... Add

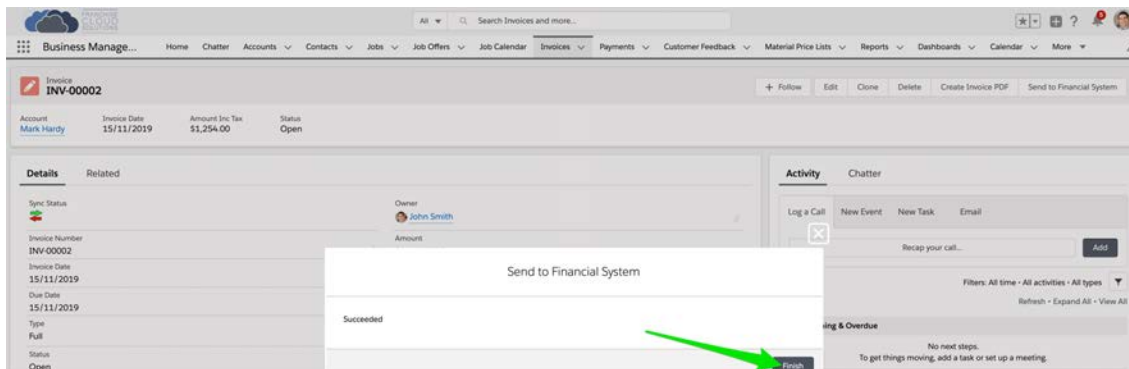
Filters: All time - All activities - All types

Upcoming & Overdue

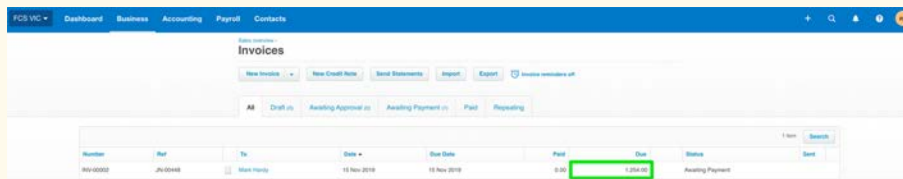
No next steps.  
To get things moving, add a task or set up a meeting.

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.

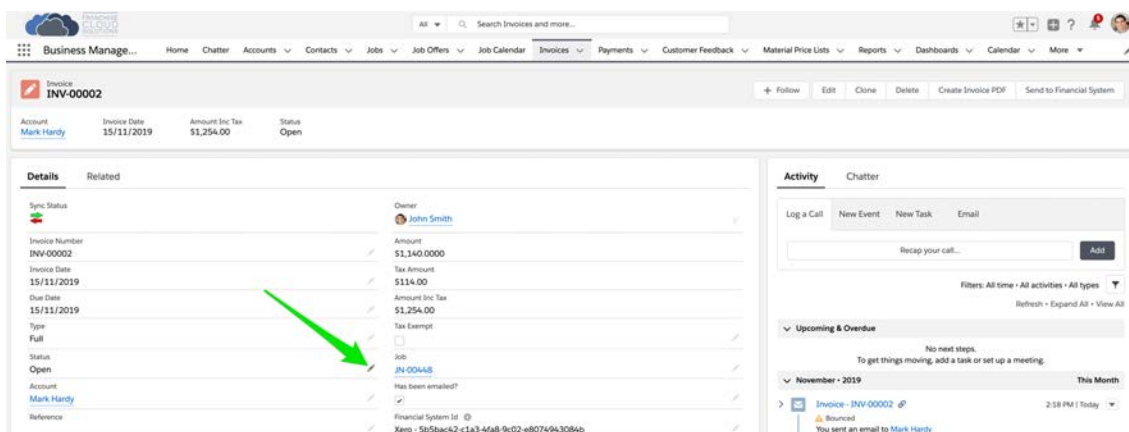


## How to void an issued invoice

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*.

The screenshot shows the 'Details' tab for invoice INV-00002. The 'Status' dropdown menu is open, and 'Voided' is selected. Green arrows point to the dropdown and the 'Voided' option.

Field	Value
Invoice Number	INV-00002
Invoice Date	15/11/2019
Due Date	15/11/2019
Type	Full
Status	Voided
Owner	John Smith
Amount	\$1,140.0000
Tax Amount	\$114.00
Amount Inc Tax	\$1,254.00
Job	JN-00448
Financial System Id	Xero - 5b5bac42-c1a3-4fa8-9c02-e80749a3084b

3. Now press **Save**.

The screenshot shows the 'Details' tab for invoice INV-00002. The 'Status' dropdown menu is open, and 'Voided' is selected. A green arrow points to the 'Save' button.

Field	Value
Invoice Number	INV-00002
Invoice Date	15/11/2019
Due Date	15/11/2019
Type	Full
Status	Voided
Owner	John Smith
Amount	\$1,140.0000
Tax Amount	\$114.00
Amount Inc Tax	\$1,254.00
Job	JN-00448
Financial System Id	Xero - 5b5bac42-c1a3-4fa8-9c02-e80749a3084b

4. If you are synchronizing with Xero, press **Send to Financial System**. This will send the update to your financial system.

The screenshot shows the 'Details' tab for invoice INV-00002. The 'Status' dropdown menu is open, and 'Voided' is selected. A green arrow points to the 'Send to Financial System' button.

Field	Value
Invoice Number	INV-00002
Invoice Date	15/11/2019
Due Date	15/11/2019
Type	Full
Status	Voided
Owner	John Smith
Amount	\$1,140.0000
Tax Amount	\$114.00
Amount Inc Tax	\$1,254.00
Job	JN-00448
Financial System Id	Xero - 5b5bac42-c1a3-4fa8-9c02-e80749a3084b



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.



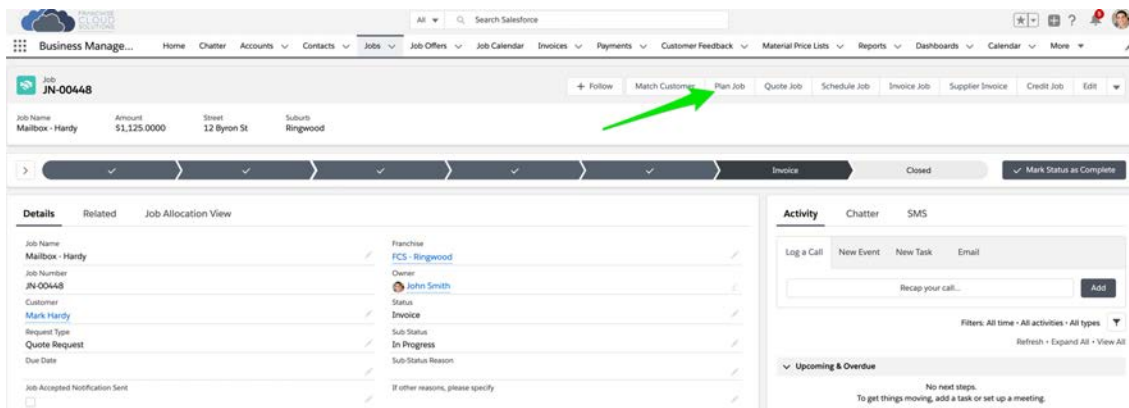
After voiding an invoice, you will most likely want to generate a new invoice. See “How to re-invoice after voiding an invoice” below

## 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**.



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**.

The screenshot shows the 'Business Management' interface. At the top, there's a navigation bar with tabs like Home, Chatter, Accounts, Contacts, Jobs, Job Offers, Job Calendar, Invoices, Payments, Customer Feedback, Material Price Lists, Reports, Dashboards, Calendar, and More. Below this, the 'Job' section for 'JN-00448' is displayed. A green arrow points to the 'Invoice Job' button in the top right corner of the job details section. The job details include Job Name (Mailbox - Hardy), Amount (\$1,125.0000), Street (12 Byron St), and Suburb (Ringwood). Below the job details, there's a 'Details' tab with a table showing job information and a 'Related' tab with a table showing related items. The 'Invoice' tab is currently selected, showing a progress bar and a 'Mark Status as Complete' button.

3. The Invoice dialog displays. Create a **Full**, **Line Item** or **Custom** invoice as desired then press **Generate Invoice**.

The screenshot shows the 'Invoice' dialog. At the top, there's a tab bar with 'Full', 'Line Item', and 'Custom' tabs. The 'Full' tab is selected. Below the tabs, there's a form with fields for 'Number' (INV-00003), 'Due Date' (15/11/2019), 'Job Name' (Mailbox - Hardy), 'Job Amount Ex. Tax' (\$1,125.00), 'Customer Name' (Mark Hardy), 'Job Amount Inc. Tax' (\$1,237.50), 'Tax Rate (%)' (10), and 'Invoice Amount' (\$1,237.50). Below the form, there's a table with columns 'SUMMARY', 'AMOUNT', 'AMOUNT INC TAX', and 'ACCOUNT CODE'. The table has two rows: 'Remove existing mailbox' with amount \$215.00, amount inc tax \$236.50, and account code 200; and 'Build new mailbox' with amount \$910.00, amount inc tax \$1,001.00, and account code 200. At the bottom right, there are 'Cancel' and 'Generate Invoice' buttons. A green arrow points to the 'Generate Invoice' button.

4. The newly generated invoice displays.

The screenshot shows the newly generated invoice in the 'Business Management' interface. The 'Invoice' tab is selected, showing the invoice details for 'INV-00003'. The invoice details include Account (Mark Hardy), Invoice Date (15/11/2019), Amount Inc Tax (\$1,237.50), and Status (Open). Below the invoice details, there's a 'Details' tab with a table showing invoice information and a 'Related' tab with a table showing related items. The 'Invoice' tab is currently selected, showing a progress bar and a 'Mark Status as Complete' button.

# 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.

2. From the **Payments** section, press **New**.

The screenshot shows the Salesforce Business Management interface. At the top, there's a navigation bar with 'Business Managem...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. Below this, the 'Invoices' section is active, showing 'Invoice INV-00019' with details like 'Account: Alistair Campbell', 'Invoice Date: 19/04/2018', 'Amount Inc Tax: \$942.15', and 'Status: Open'. The 'RELATED' tab is selected, showing 'Invoice Line Items (1)' and 'Payments (0)'. A green arrow points to the 'New' button next to 'Payments (0)'. The 'ACTIVITY' tab is also visible on the right.

The **New Payment** dialog box appears.

3. Press **Next**.

The 'New Payment' dialog box is shown. It has a title 'New Payment' and a section 'Select a record type' with two radio buttons: 'Payment' (selected) and 'Credit Allocation'. At the bottom, there are 'Cancel' and 'Next' buttons. 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. The top navigation bar includes 'Business Management', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. The main content area displays the invoice 'INV-00019' with details: Account (Alistair Campbell), Invoice Date (19/04/2018), Amount Inc Tax (\$942.15), and Status (Open). The 'RELATED' section shows 'Invoice Line Items (1)' and 'Payments (1)'. The 'Payments (1)' section is highlighted with a green box, showing a payment with Payment Number 'PMT-000081', Type 'Payment', and Status 'Paid in full'. The 'ACTIVITY' section on the right shows 'Log a Call', 'New Event', 'New Task', and 'More' options.

## 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.

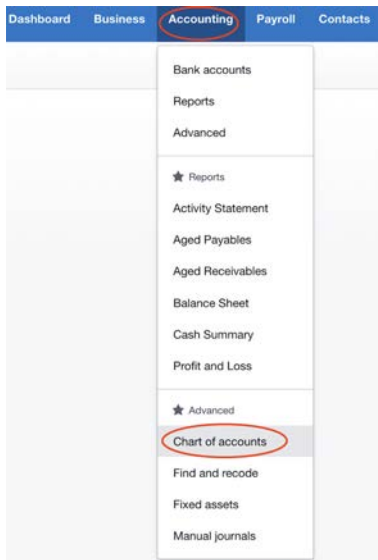


### What you need

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**.

**Edit Account Details**

**Account Type**  
Expense (limited to 10 characters)

**Tax**  
The default tax setting for this account  
GST on Expenses  
☐ Show on Dashboard Watchlist  
☐ Show in Expense Claims  
☒ **Enable payments to this account**

**How account types affect your reports**

**Profit & Loss**  
Income  
Revenue  
Sales  
Less Cost of Sales  
Direct Costs  
GROSS PROFIT  
Plus Other Income  
Other Income  
Less Expenses  
Expenses  
Depreciation  
Overheads  
NET PROFIT

**Balance Sheet**  
Current Assets  
Current Assets  
Inventory  
Prepayments  
Plus Bank  
Bank Accounts  
Plus Fixed Assets  
Fixed Assets  
Plus Non-current Assets  
Non-current Assets  
TOTAL ASSETS  
Less Current Liabilities  
Current Liabilities  
Less Non-current Liabilities  
Non-current Liabilities  
NET ASSETS  
Equity  
Equity  
Plus Net Profit  
TOTAL EQUITY

**Save** **Cancel**

You can also modify where accounts appear in your reports using [Customised Report Layouts](#)



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**  
Jo Bayless  
73 Toole St  
HOPETOUN VIC 3396  
AUSTRALIA  
[Edit address](#)

**Date** 21 Oct 2022 **Due Date** 4 Nov 2022 **Invoice #** INV-01006 **Reference** JN-1622639 **Online Payments** None. [Get set up now](#)

**Total** 330.00

Amounts are **Tax Exclusive**

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
								<b>TOTAL</b>	<b>330.00</b>

**Receive a payment**

Amount Paid 330.00 Date Paid 21 Oct 2022 Paid To 970 - Owner A Share Capital Reference **Add Payment**

**Expenditures**  
560 - Direct Salary & Wages  
612 - Bad Debts Expense

**History & Notes**  
Edited by Hire A Hubby on 21 Oct 2022 at 13  
INV-01006 to Jo Bayless for 330.00. 689 - Franchise Super

[Switch to new invoicing](#)

Use the drop-down arrow to select the Bad Debt account the payment is to be made from.

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 'Business Manager' interface for 'Franchise Cloud Solutions'. The 'Invoices' tab is selected, showing details for invoice 'INV-00041'. The invoice is issued to 'Fred Styles' on '11/05/2022' with a status of 'Open' and an 'Amount Inc Tax' of '\$691.21'. The 'Details' section on the left lists various fields: Sync Status (green), Invoice Number (INV-00041), Invoice Date (11/05/2022), Due Date (11/05/2022), Type (Full), Status (Open), Account (Fred Styles), Reference (JN-00600), Amount Paid (\$690.00), Amount Credited (\$0.00), and Amount Owning (\$1.21, highlighted in a green box). The 'Owner' is 'John Smith' and the 'Job' is 'JN-00600'. The 'Payment Details' section shows 'Amount Paid' (\$690.00), 'Amount Credited' (\$0.00), and 'Amount Owning' (\$1.21). The 'Invoice Sender' section on the right has a 'Send Invoice PDF' button. The 'Activity' section on the right shows 'Upcoming & Overdue' with 'No next steps' and 'No past activity'.

## 2. Press **Credit Invoice**.

The screenshot shows the 'Business Management' interface for 'FRANCHISE CLOUD SOLUTIONS'. The 'Invoices' tab is selected. The invoice details for 'INV-00041' are displayed, including the account 'Fred Styles', invoice date '11/05/2022', and amount inc tax '\$691.21'. The status is 'Open'. A green arrow points to the 'Credit Invoice' button in the top right corner of the invoice details section.

The **Credit Note** dialog box opens.

## 3. Enter the value for which this **Credit Note** is being issued.

The 'Credit Note' dialog box is shown. It contains the following information:

- Invoice Number: CR-00042
- Reference: INV-00041
- Amount Inc Tax: 1.21

Below this information is a table with the following columns: SUMMARY, AMOUNT, TAX INCLUSIVE, AMOUNT INC TAX, and ACCOUNT CODE.

SUMMARY	AMOUNT	TAX INCLUSIVE	AMOUNT INC TAX	ACCOUNT CODE
1 Credit no	\$1.21	<input checked="" type="checkbox"/>	\$1.21	410

At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Generate Credit Note'. A green arrow points to the 'Generate Credit Note' button.

#### 4. Press **Generate Credit Note**.

The **Credit Note** invoice displays.

The screenshot displays the 'Business Management' interface for 'Franchise Cloud Solutions'. The top navigation bar includes links for Home, Tasks, Chatter, Accounts, Jobs, Job Calendar, Invoices, Contacts, Audits, and More. The main content area shows an invoice for 'CR-00042' issued to 'Fred Styles' on '11/05/2022' for an amount of '\$1.21'. The status is 'Open'. The interface is divided into two main sections: 'Details' and 'Related'. The 'Details' section is further divided into 'System Information' and 'Invoice Details'. The 'System Information' section shows the invoice was created by 'John Smith' on '11/05/2022 11:25 AM' and is a 'Credit Note' in 'AUD - Australian Dollar'. The 'Invoice Details' section shows the 'Owner' as 'John Smith', 'Job' as 'JN-00600', 'Total Amount Allocated' as '\$1.21', 'Amount Inc Tax' as '\$1.21', 'Credit Balance' as '\$1.21', and 'Financial System Id' as '1'. The 'Related' section shows the 'Invoice Number' as 'CR-00042', 'Invoice Date' as '11/05/2022', 'Status' as 'Open', and 'Account' as 'Fred Styles'. On the right side, there is an 'Invoice Sender' section with a 'Send Invoice PDF' button, and an 'Activity' section with a 'Log a Call' button and a 'Recap your call...' button. Below these are filters for 'All time', 'All activities', and 'All types', and a section for 'Upcoming & Overdue' with a message: '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.'



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 'Business Management' interface for 'FRANCHISE CLOUD SOLUTIONS'. The top navigation bar includes 'Home', 'Tasks', 'Chatter', 'Accounts', 'Jobs', 'Job Calendar', 'Invoices', 'Contacts', 'Audits', and 'More'. A search bar is present with the text 'Search Invoices and more...'. The main content area shows an 'Invoice' for 'CR-00042' with a status of 'Open'. A green arrow points to the 'Related' tab, which is currently selected. The 'Details' tab is also visible. The 'Related' tab shows a list of related items, including 'Invoice Number', 'Invoice Date', 'Status', 'Account', 'Reference', 'System Information', 'Owner', 'Job', 'Total Amount Allocated', 'Amount Inc Tax', 'Credit Balance', 'Financial System Id', 'Created By', 'Last Modified By', 'Currency', and 'Record Type'. The 'Invoice Sender' section on the right includes a 'Send Invoice PDF' button. The 'Activity' section on the right shows a 'Log a Call' button and a 'Recap your call...' button. The 'Upcoming & Overdue' section shows 'No next steps' and 'No past activity'.

**Invoice**  
CR-00042

Account: Fred Styles | Invoice Date: 11/05/2022 | Amount Inc Tax: \$1.21 | Status: Open

**Details** | **Related** (selected)

**Related Items:**

Field	Value
Invoice Number	CR-00042
Invoice Date	11/05/2022
Status	Open
Account	Fred Styles
Reference	JN-00600
System Information	
Owner	John Smith
Job	JN-00600
Total Amount Allocated	\$0.00
Amount Inc Tax	\$1.21
Credit Balance	\$1.21
Financial System Id	Xero - db15d20b-5535-4f5f-a4fa-168bd624a53e
Created By	John Smith, 11/05/2022 11:25 AM
Last Modified By	John Smith, 11/05/2022 11:33 AM
Currency	AUD - Australian Dollar
Record Type	Credit Note

**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

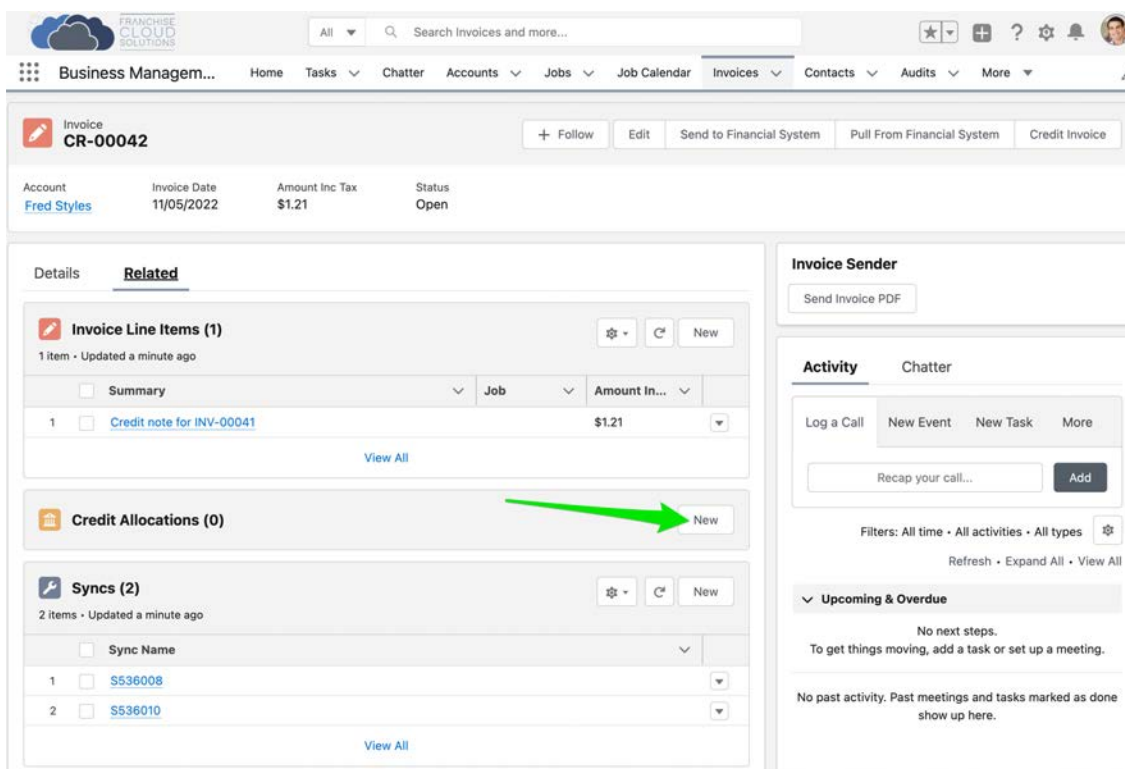
Refresh • Expand All • View All

**Upcoming & Overdue**

No next steps.  
To get things moving, add a task or set up a meeting.

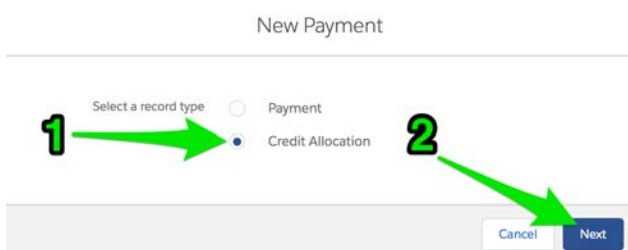
No past activity. Past meetings and tasks marked as done show up here.

2. From the **Credit Allocations** section, press **New**.



The New Payment dialog box opens.

3. Choose **Credit Allocation**, then press **Next**.



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

\* Invoice  
INV-00041  
Amount  
1.21  
Effective Date  
11/05/2022

\* Type  
Credit Allocation

Credit Note  
CR-00042

Reference

Status

**System Information**

Currency  
AUD - Australian Dollar

Record Type  
Credit Allocation

Financial System Id

Cancel

Save & New

Save



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**  
Account: Fred Styles | Invoice Date: 11/05/2022 | Amount Inc Tax: \$1.21 | Status: Closed

**Details**  
**Related**  
**Invoice Line Items (1)**  
1 item • Updated 4 minutes ago  
Summary | Job | Amount In...  
1 | Credit note for INV-00041 | \$1.21  
View All

**Credit Allocations (1)**  
1 item • Updated a few seconds ago  
Payment Number | Invoice  
1 | PMT-000176 | INV-00041  
View All

**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.

6. You can check that this is correct by selecting the 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)** 1 item - Updated 4 minutes ago

Summary	Job	Amount In...
1 <a href="#">Credit note for INV-00041</a>		\$1.21

[View All](#)

**Credit Allocations (1)** 1 item - Updated a minute ago

Payment Number	Invoice
1 <a href="#">PMT-000176</a>	<a href="#">INV-00041</a>

[View All](#)

**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 [Refresh](#) • [Expand All](#) • [View All](#)

**Upcoming & Overdue**

No next steps.  
To get things moving, add a task or set up a meeting.

7. Review **Payment Details**. Check that the Amount Owning is \$0.00. When this is the case the credit note has been correctly allocated.

Business Management... Home Tasks Chatter Accounts Jobs Job Calendar Invoices Contacts Audits More

Invoice **INV-00041** + Follow Edit Send to Financial System Pull From Financial System Credit Invoice

Account [Fred Styles](#) Invoice Date 11/05/2022 Amount Inc Tax \$691.21 Status Closed

**Details** **Related**

Sync Status Owner [John Smith](#)

Invoice Number INV-00041 Amount \$628.3700

Invoice Date 11/05/2022 Tax Amount \$62.84

Due Date 11/05/2022 Amount Inc Tax \$691.21

Type Full Tax Exempt ☐

Status Closed Job [JN-00600](#)

Account [Fred Styles](#) Has been emailed? ☐

Reference JN-00600 Financial System Id [Xero - 88a87852-44d8-4457-9f34-120203e40264](#)

**Payment Details**

Amount Paid \$690.00	Date Paid
Amount Credited \$1.21	Days to Pay
Amount Owning \$0.00	

**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 [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.



## 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 displays the 'Business Management' interface. At the top, there's a navigation bar with 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. The 'Accounts' tab is selected. Below this, the 'Account' section for 'Smith's Floorworld Ringwood' is shown. It includes buttons for '+ Follow', 'Edit', 'Delete', 'View Account Hierarchy', 'View Website', 'Create New Job', and 'Supplier Invoice'. The account details are listed in a table:

Type	Phone	Website	Account Owner	Account Site	Industry
Technology Partner	(03) 9879 1622	www.floorworld.com.au	Ringwood Franchisee		

Below the table, there's a 'Details' section with a 'Related' tab. The 'Details' tab is active, showing fields for 'Account Name', 'Parent Account', 'Company Number', 'Business Number', 'Type', and 'Industry'. The 'Related' tab shows 'Account Owner', 'Franchise', 'Email', 'Phone', 'Fax', 'Website', and 'Available as Supplier'. A green arrow points to the 'Edit' button in the top right corner of the account details section.

4. Check Available as Supplier. Enter the Default Tax Rate, then press **Save**.

The screenshot shows the 'Business Manager' interface for 'Smith's Floorworld Ringwood'. The 'Details' tab is active, displaying various account information. The 'Available as Supplier' checkbox is checked and highlighted with a yellow background. A green arrow labeled '1' points to the 'Type' dropdown menu, and another green arrow labeled '2' points to the 'Available as Supplier' checkbox. The 'Save' button is visible at the bottom of the form.

Details	
* Account Name	Smith's Floorworld Ringwood
Parent Account	Search Accounts...
Company Number	
Business Number	55005946654
Type	Technology Partner
Industry	--None--
Account Owner	Ringwood Franchisee
Franchise	FCS Ringwood
Email	ringwood@floorworld.com.au
Phone	(03) 9879 1622
Fax	(03) 9879 5267
Website	www.floorworld.com.au
Available as Supplier	<input checked="" type="checkbox"/>
<div>Cancel Save</div>	

The account is now available in the system as a supplier.

# Creating a supplier invoice

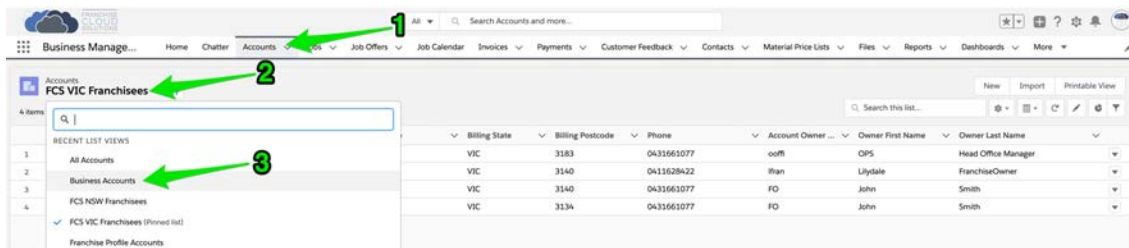
Business Management allows you to associate lines from a supplier invoice against a job. This allows you to track the expenses incurred by particular jobs.



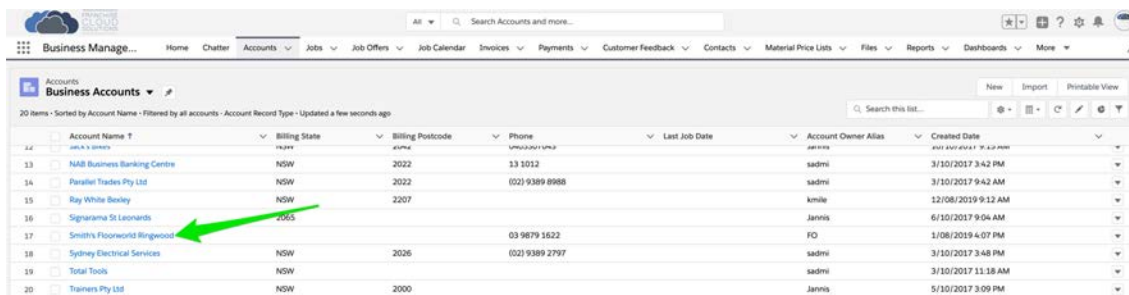
You can also record purchases not intended for a job (i.e. purchases for stock). To do this, ensure the Job on the invoice line is blank.

## To record a supplier invoice

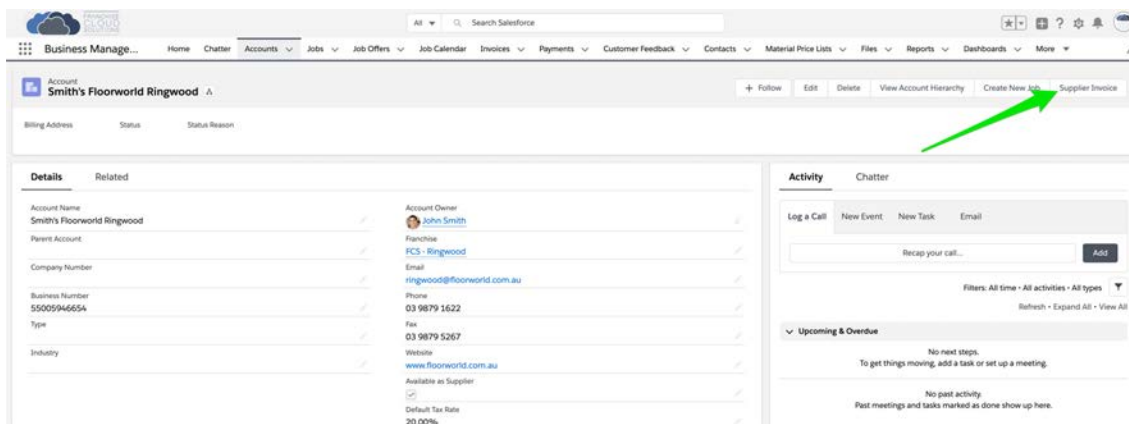
1. From the Salesforce **Accounts** list, select the **Business Accounts** list view.



2. Select the target supplier account.



3. From the **Account** page, press **Supplier Invoice**.



The **Supplier Invoice** dialog box appears.

4. Enter the supplier invoice header details.

Supplier Invoice

* Supplier Invoice Number D8932	Status Open
* Invoice Date 19/11/2019	* Due Date 26/11/2019
Reference D8932A	
Tax Rate (%) 10	Invoice Amount \$0.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX	
1	<input type="text" value="Search Job"/> <input type="button" value="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 D8932	Status Open
* Invoice Date 19/11/2019	* Due Date 26/11/2019
Reference D8932A	
Tax Rate (%) 10	Invoice Amount \$56.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX	
1	<input type="button" value="JN-00156"/> <input type="button" value="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 D8932	Status Open
* Invoice Date 19/11/2019	* Due Date 26/11/2019
Reference D8932A	
Tax Rate (%) 10	Invoice Amount \$56.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX	
1	<input type="button" value="JN-00156"/> <input type="button" value="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"/> <input type="button" value="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"/>

7. When the invoice is complete, press **Generate Invoice**.

Supplier Invoice

* Supplier Invoice Number D8932	Status Open
* Invoice Date 19/11/2019	* Due Date 26/11/2019
Reference D8932A	
Tax Rate (%) 10	Invoice Amount \$3,306.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	JN-00156 X Grout	310	\$56.00	<input checked="" type="checkbox"/>	\$56.00 +
2	JN-00156 X Tiles	310	\$3,250.00	<input checked="" type="checkbox"/>	\$3,250.00 +

[Cancel](#) [Generate Invoice](#)

8. The supplier invoice is now generated.

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

Invoice D8932 + Follow Edit Clone Delete Create Invoice PDF Send to Financial System

Account: Smith's Floorworld Ringwood Invoice Date: 19/11/2019 Amount Inc Tax: \$3,306.00 Status: Open

Details	Related
Sync Status	Owner: John Smith
Invoice Number: D8932	Amount: \$3,005.4545
Invoice Date: 19/11/2019	Tax Amount: \$300.54
Due Date: 26/11/2019	Amount Inc Tax: \$3,306.00
Type:	Tax Exempt: <input type="checkbox"/>
Status: Open	Job:
Account: Smith's Floorworld Ringwood	Has been emailed?: <input type="checkbox"/>
Reference: D8932A	Financial System Ltd ID:

**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.



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

A day on the road .....	ccxciv
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Travel directions to a job .....	ccxcviii
Travel directions .....	ccxcviii
Logging time against a job .....	ccxcix
Viewing a work order .....	cccii
Work order .....	cccii
Creating a quick job .....	ccciii
Creating a quick quote .....	ccciv
Marking a job as complete .....	cccvi
Invoicing a job .....	cccix
Changing an appointment .....	cccxi
Scheduling a job .....	cccxviii
Contacting the customer .....	cccxxvi
To place a call or send an SMS .....	cccxxvi
Viewing the shopping list .....	cccxxviii



Shopping list .....cccxxviii

Logging a call .....cccxxix

Rapid job scheduling .....cccxxx

Taking notes, photos and videos in the field .....cccxxxiii

Clearing cached screens and data .....ccclvi

# 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
- » Receipting 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.

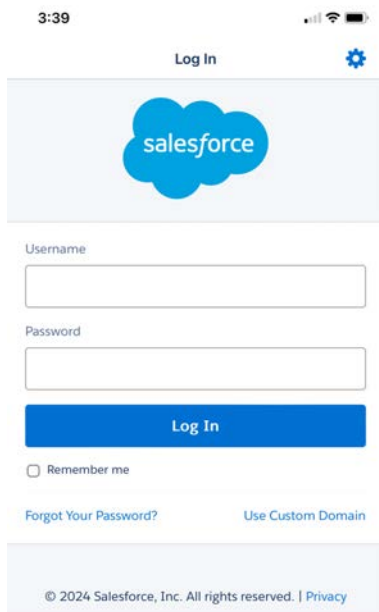
To install and log into the mobile Salesforce app

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 **check-**box, then press **Log In**.



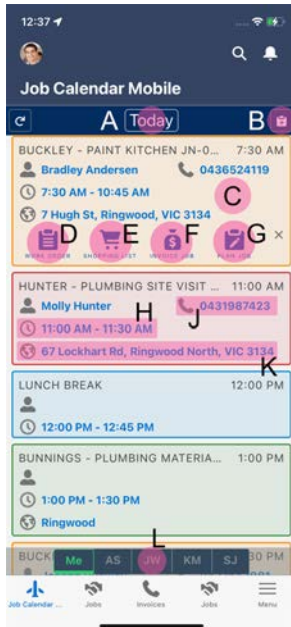
The screenshot shows the Salesforce mobile app's login interface. At the top, the status bar displays the time 3:39, signal strength, Wi-Fi, and battery. Below the status bar, the text "Log In" is centered, with a gear icon to its right. The Salesforce logo, a blue cloud with the word "salesforce" in white, is prominently displayed. Below the logo are two input fields: "Username" and "Password". A blue "Log In" button is positioned below the password field. 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 contains the copyright notice "© 2024 Salesforce, Inc. All rights reserved." and a link to "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.

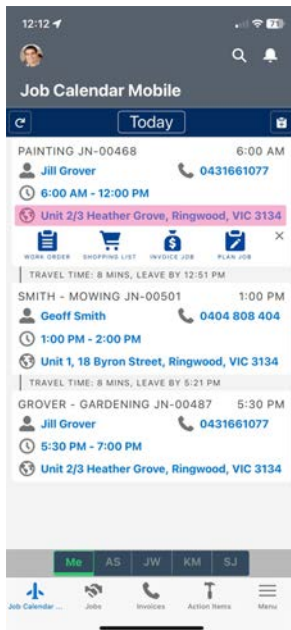
» To see yesterday's or tomorrow's appointments, tap on **A**.

» 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.

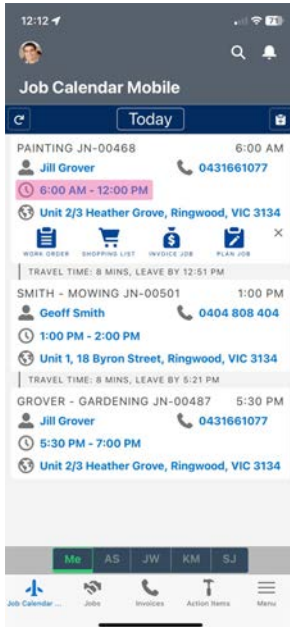
Tapping on the address will open the default map for your operating system:

- » 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.

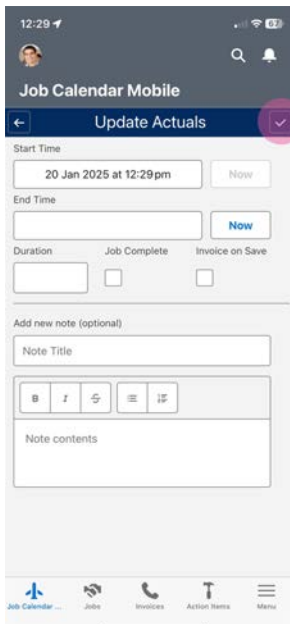
## Time logging



Tap the clock or the time to:

- » Clock time-on
- » Clock time-off
- » Record duration
- » Mark job as complete
- » Add a note

## Clock-on

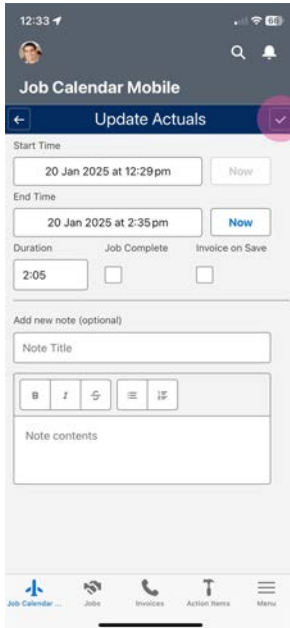


Press the **Tick** button to clock on with the current time.

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

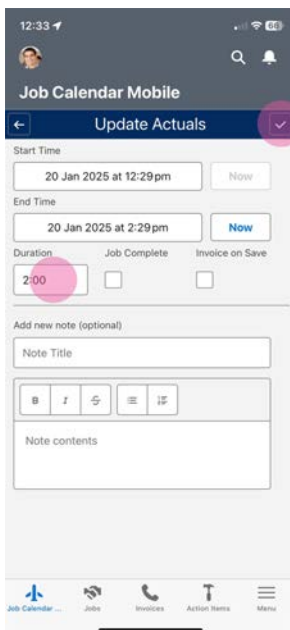


After you have finished the Job, press the **Tick** button to clock off with the current time.

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

12:33



Job Calendar Mobile

 Update Actuals 

Start Time

20 Jan 2025 at 12:29 pm

Now


End Time

20 Jan 2025 at 2:29 pm

Now

Duration

2:00








Invoice on Save

☐

Add new note (optional)

Note Title



Note contents

Job Calendar

Jobs

Invoices

Action Items

Menu

When the Job is finished, you can then mark the job as complete.



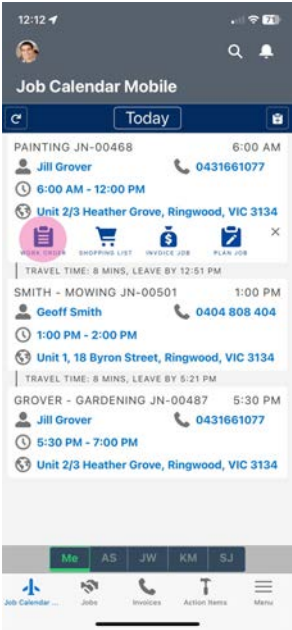
When a job is marked as complete, it will show as complete on all events linked to the job.

# 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.

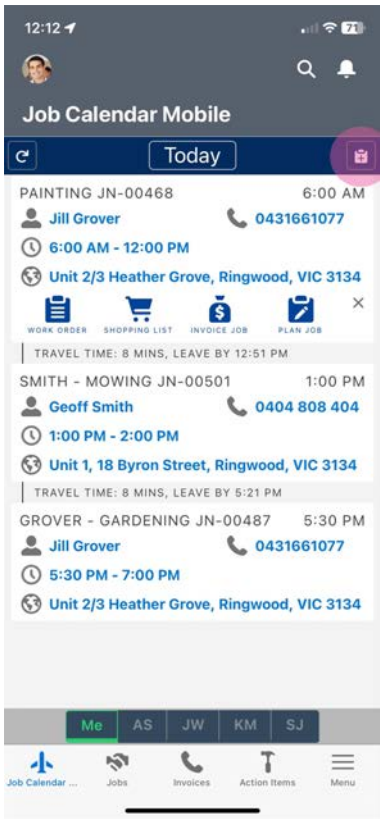


# Creating a quick job

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, there's a status bar with the time 3:31 and battery level 50%. Below the app title, there are two input fields for names: 'Emily' and 'Howard'. A phone number field contains '0421756821'. An email field contains 'eh@gmail.com'. An 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 description field contains 'Patch hole' and a price field contains '\$70.00'. There are two sections: 'Scheduled for' with a date and time '17 Jan 2025 at 3:00pm', and 'Duration' with a value '0.50'. Below these are several icons for text formatting (bold, italic, underline, list, link, unlink, indent, outdent). A large text area contains '50mm x 50mm hole in plaster'. At the bottom, there are 'Submit' and 'Cancel' buttons. The 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.



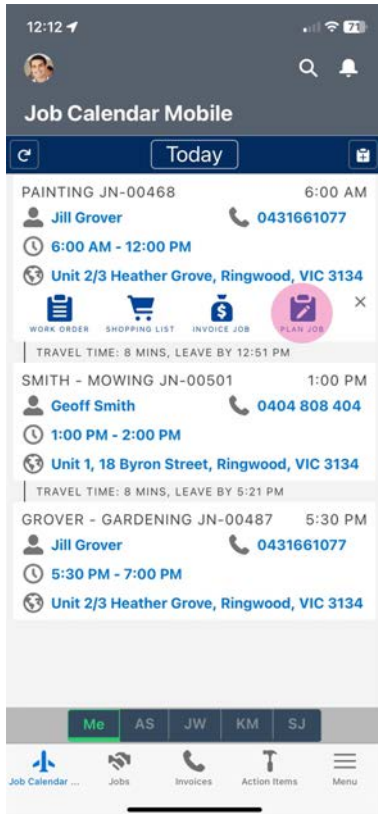
On record creation, the system presents the Quick Quote page to you. You can optionally generate and then send the quote to your new customer, See “Creating a quick quote” on the next page.

# Creating a quick quote

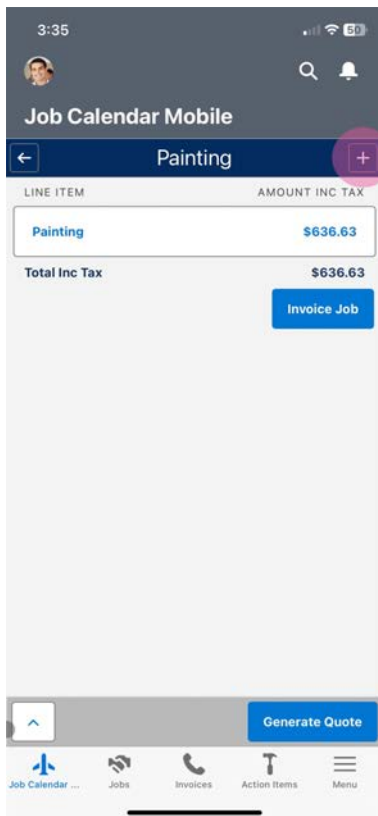
You can rapidly create and send a quick quote while on a job. This will allow you to provide a quote to a customer with the potential to have it accepted instantly.

## To create a quick quote

1. On Job Calendar Mobile, tap the event's **Quote**  button.



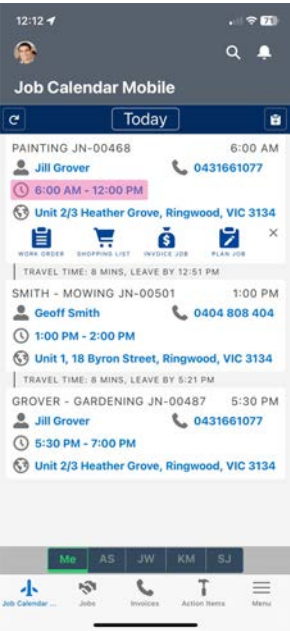
2. Press the **Plus** button to add a new line.



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.

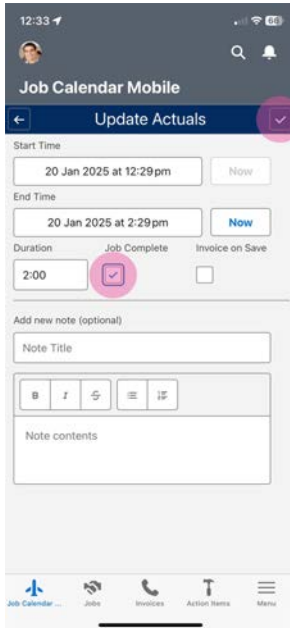
# Marking a job as complete

## Time logging



Tap the clock or the time to mark job as complete.

## Job complete



The screenshot shows the 'Job Calendar Mobile' app interface. At the top, there's a status bar with the time 12:33 and various icons. Below that, the app title 'Job Calendar Mobile' is displayed. A navigation bar shows a back arrow, the text 'Update Actuals', and a checkmark icon. The main form has several sections: 'Start Time' with a date/time picker set to '20 Jan 2025 at 12:29 pm' and a 'Now' button; 'End Time' with a date/time picker set to '20 Jan 2025 at 2:29 pm' and a 'Now' button; 'Duration' with a dropdown set to '2:00'; 'Job Complete' with a checked checkbox (highlighted with a pink circle); and 'Invoice on Save' with an unchecked checkbox. Below these is a section for 'Add new note (optional)' with a 'Note Title' field, a rich text editor toolbar, and a 'Note contents' text area. At the bottom, there's a navigation bar with 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.

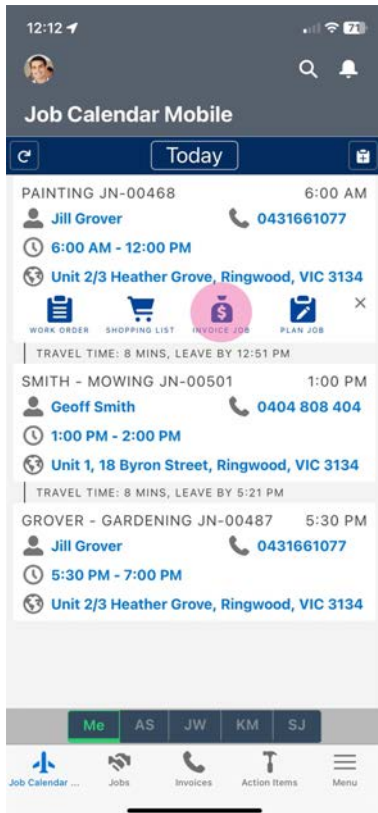


# Invoicing a job

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.

3:40

Job Calendar Mobile

Invoice Job

**Summary**

Number	Due Date
INV-00054	16 Jan 2025
Job Name	Job Amount Inc. Tax
Painting	\$636.63
Customer Name	Job Amount To Invoice
Jill Grover	\$636.63
Tax Rate	Invoice Amount
10.00%	\$636.63

**Invoice Lines**

Full Line Custom

SUMMARY	AMOUNT INC TAX
Painting	\$636.63

Job Calendar ... Jobs Invoices Action Items Menu



## Congratulations

You have now generated an invoice. From here, you can:

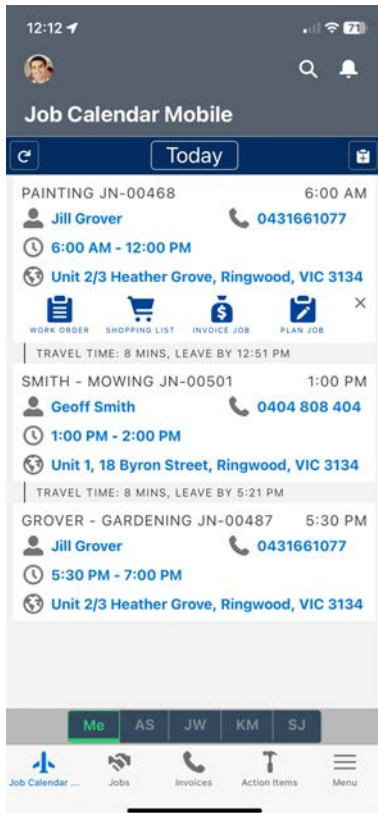
- » Take payment by card or cash.
- » Send the customer an email with an attached invoice PDF.

# Changing an appointment

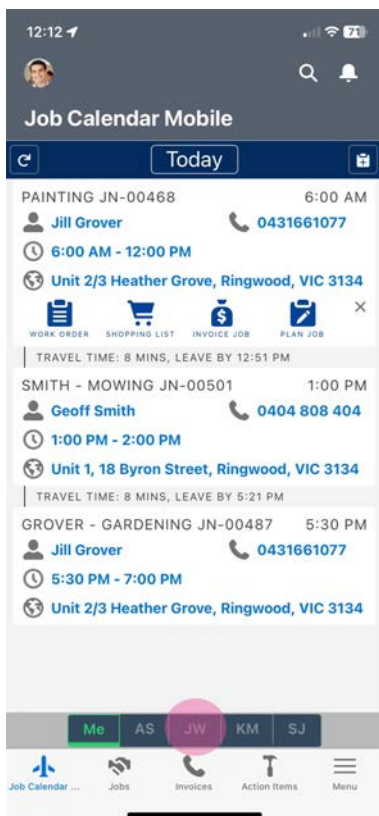
When you're on the road, you will often need to tweak your schedule. You can always modify the expected start times of appointments.

## To change an appointment

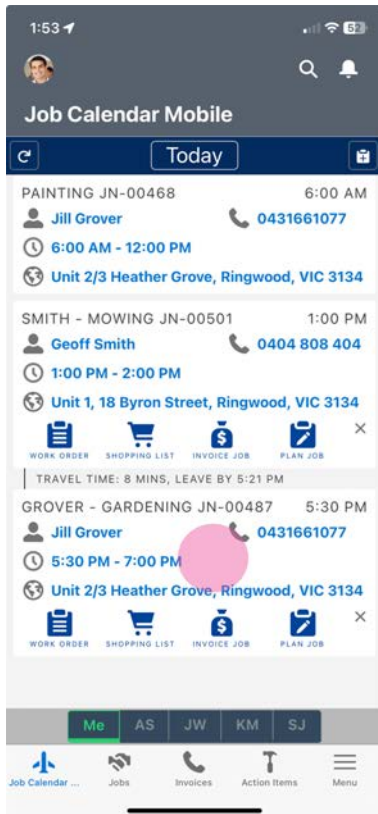
1. The first page of Salesforce Mobile shows your current day's Schedule.



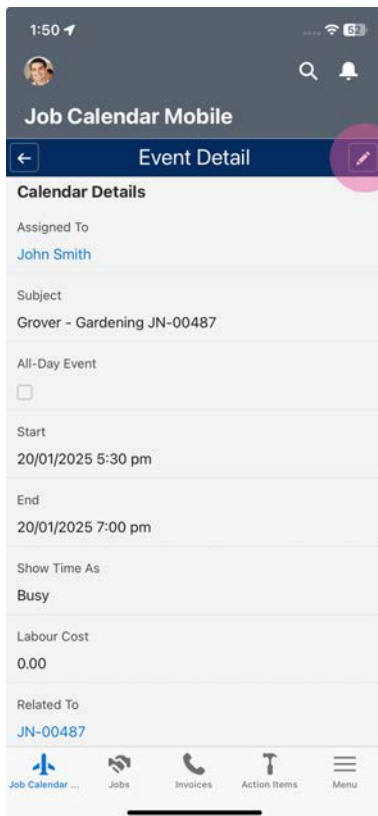
2. You can see the daily schedule of any of your resources by pressing their resource alias.



3. To modify an appointment tap the white space on the event.



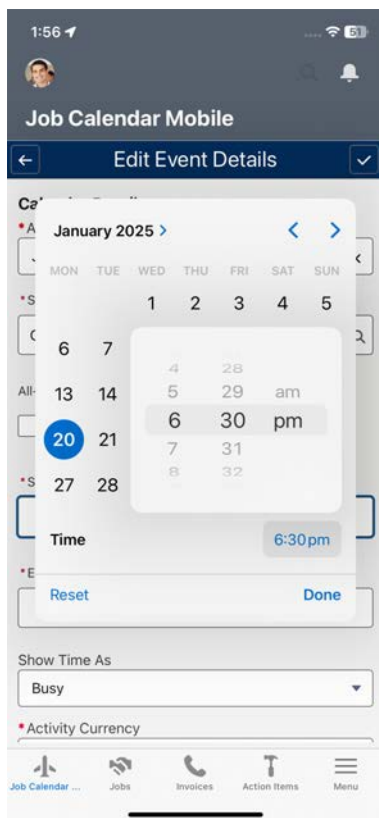
4. The **Event Detail** page appears. Click the **Edit** button.



5. Now press the `Start` field.

The screenshot shows the 'Job Calendar Mobile' app interface. At the top, the status bar displays the time 1:51, signal strength, Wi-Fi, and battery level. Below the status bar is a header with a user profile icon, a search icon, and a notification icon. The main title is 'Job Calendar Mobile'. Below this is a blue bar with a back arrow, 'Edit Event Details', and a checkmark icon. The 'Calendar Details' section includes: 'Assigned To' with a dropdown showing 'John Smith'; 'Subject' with a dropdown showing 'Grover - Gardening JN-00487'; an 'All-Day Event' checkbox; 'Start' with a date and time picker showing '20 Jan 2025 at 5:30 pm' (highlighted with a pink circle); 'End' with a date and time picker showing '20 Jan 2025 at 7:00 pm'; 'Show Time As' with a dropdown showing 'Busy'; and 'Activity Currency' with a dropdown. At the bottom is a navigation bar with icons for 'Job Calendar ...', 'Jobs', 'Invoices', 'Action Items', and 'Menu'.

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.

1:57

Job Calendar Mobile

Edit Event Details

Calendar Details

Assigned To

John Smith

Subject

Grover - Gardening JN-00487

All-Day Event

Start

20 Jan 2025 at 6:30 pm

End

20 Jan 2025 at 8:00 pm

Show Time As

Busy

Activity Currency

Job Calendar ... Jobs Invoices Action Items Menu

8. On pressing the **Tick** button, the system will show you your revised schedule.

2:01

Job Calendar Mobile

Today

PAINTING JN-00468 6:00 AM

Jill Grover 0431661077

6:00 AM - 12:00 PM

Unit 2/3 Heather Grove, Ringwood, VIC 3134

SMITH - MOWING JN-00501 1:00 PM

Geoff Smith 0404 808 404

1:00 PM - 2:00 PM

Unit 1, 18 Byron Street, Ringwood, VIC 3134

TRAVEL TIME: 8 MINS, LEAVE BY 6:21 PM

GROVER - GARDENING JN-00487 6:30 PM

Jill Grover 0431661077

6:30 PM - 8:00 PM

Unit 2/3 Heather Grove, Ringwood, VIC 3134

Me AS JW KM SJ

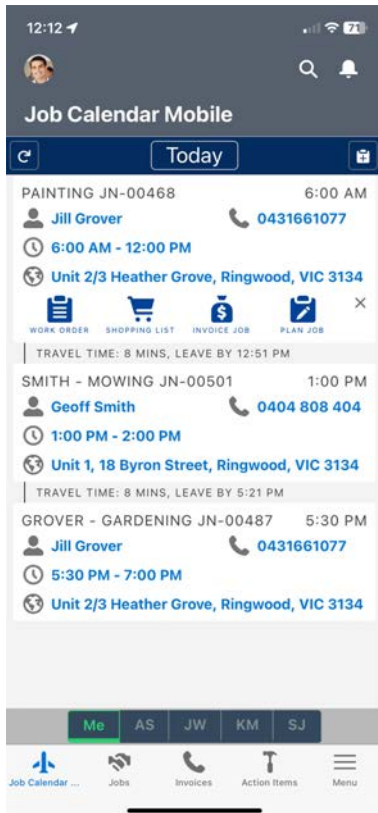
Job Calendar ... Jobs Invoices Action Items Menu

# Scheduling a job

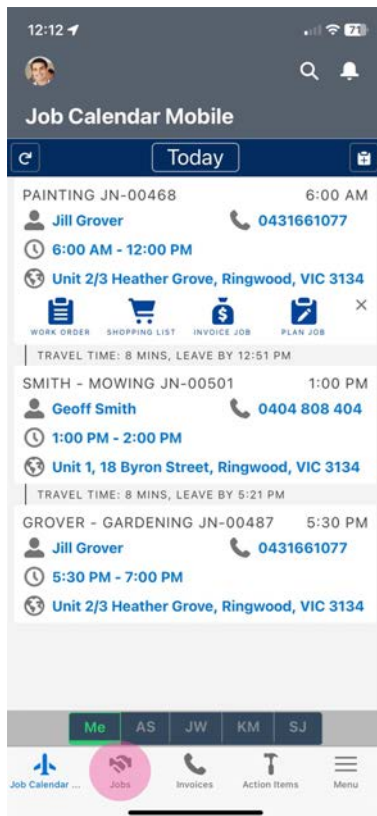
During the day you will sometimes need to squeeze in another appointment. To do this, you can schedule an appointment from the Job directly in Salesforce Mobile.

## To schedule an appointment

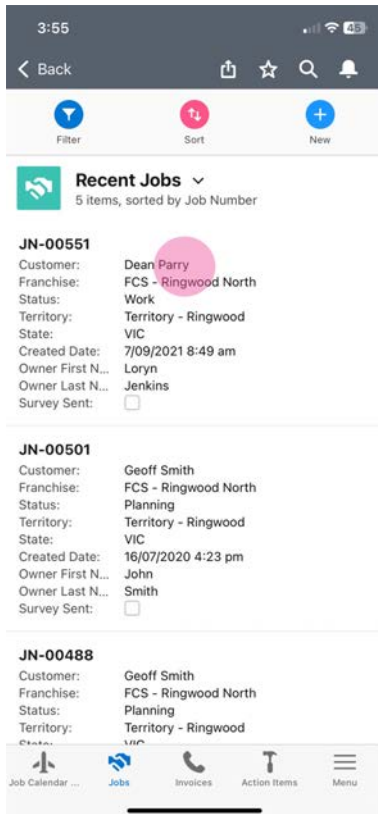
1. The first page of Salesforce Mobile shows your current day's Schedule.



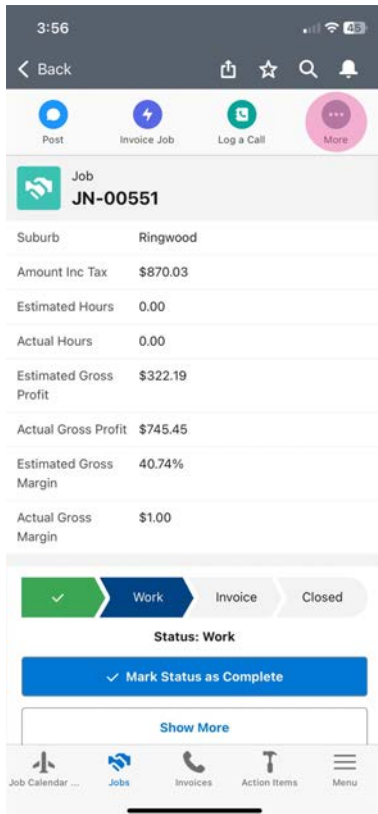
## 2. Choose Jobs.



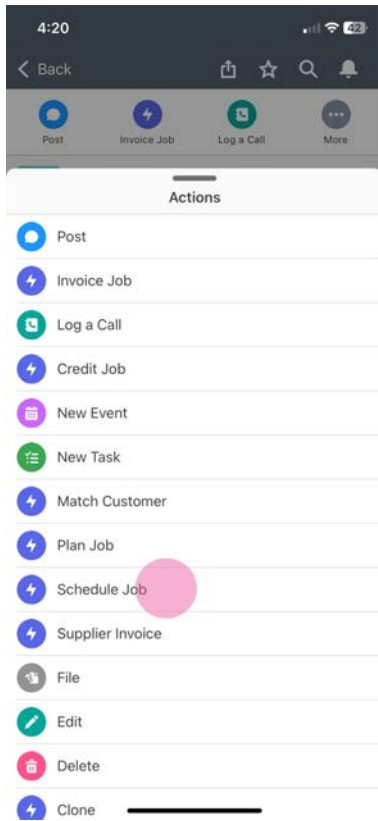
3. From the **Jobs** list page, select the desired **Job**.



4. From the menu buttons at the top of the page, choose **More**.



## 5. Select Schedule Job.



6. From the **Schedule Job** page, set the Start Date Time and End Date Time, then press **Save**.

4:28

Subject: Domestic window cle: Type: 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

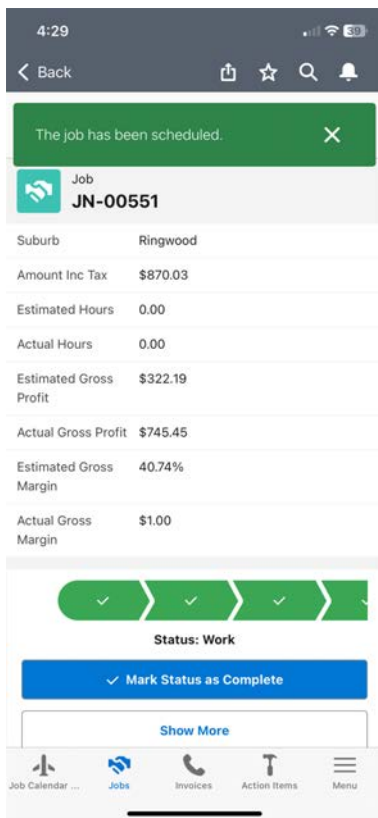
Rich Text Editor:

**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.

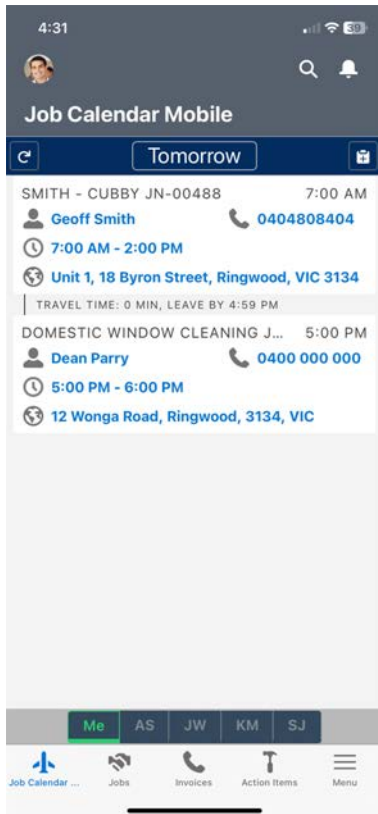
Buttons: Cancel, Save

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.





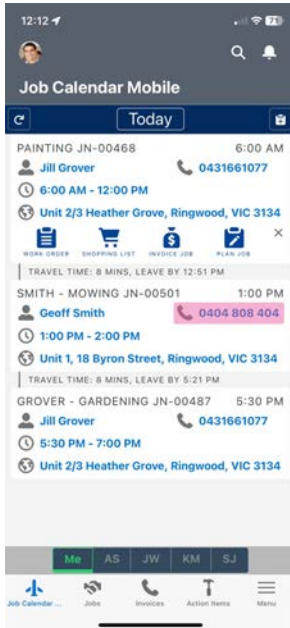
8. The system shows you your updated daily schedule.



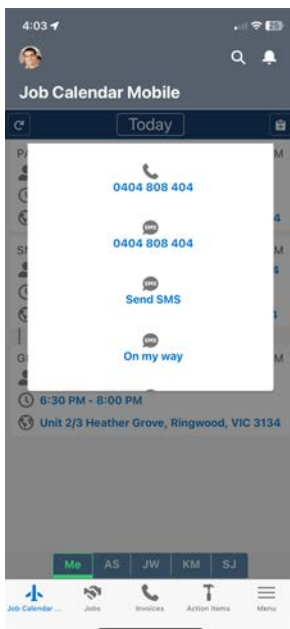
# Contacting the customer

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

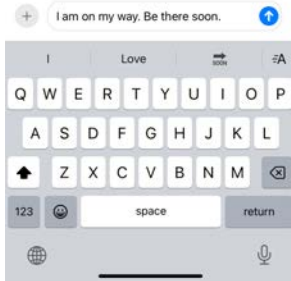
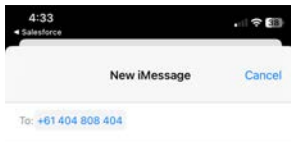


Tap on the customer's mobile phone number.



A menu appears, showing the available phone or SMS links, plus a list of commonly-used template SMSs.

Tap the most useful link.



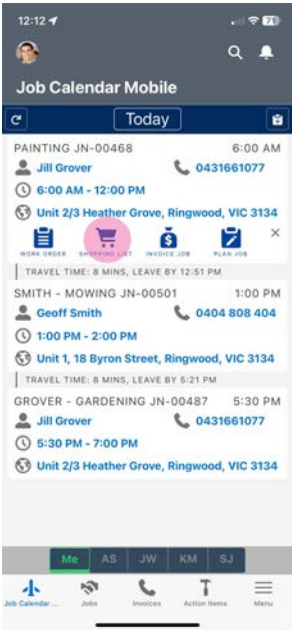
Once you have made your choice, the system transfers you to your phone or SMS app to complete the communication.

# 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

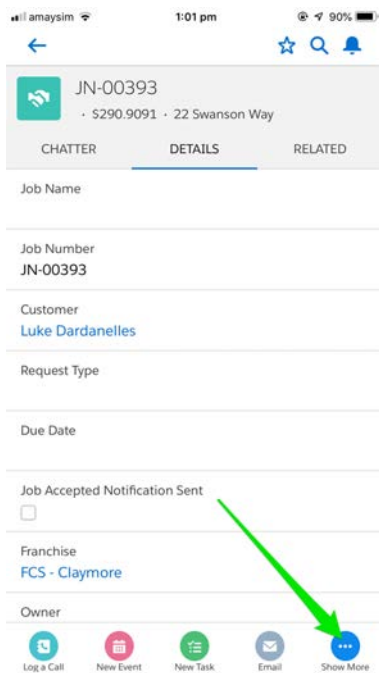
To log a call

1. From the Job, press the **Log a Call** button.
2. Record your notes.
3. Press **Save**.

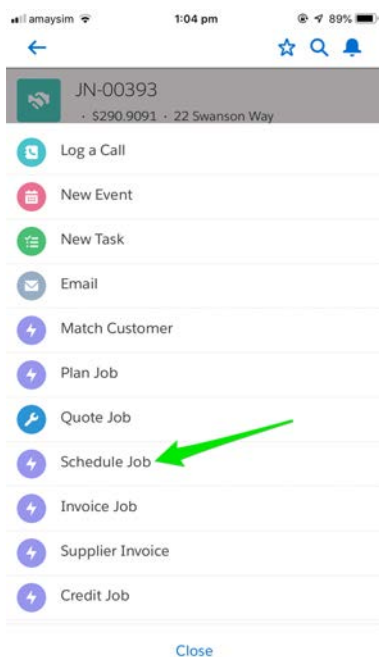
# Rapid job scheduling

To schedule a job using Salesforce mobile

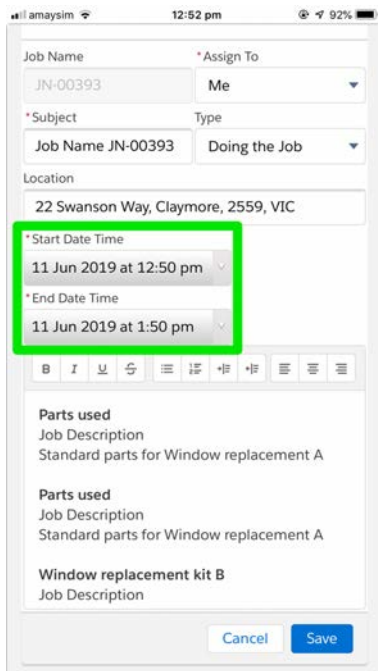
1. From the Job page, press **Show more**.



2. From the menu, select **Schedule Job**.



3. From the Schedule Job page, enter the **Start Date Time** and **End Date Time**.



amaysim 12:52 pm 92%

Job Name JN-00393 \*Assign To Me

\*Subject Job Name JN-00393 Type Doing the Job

Location 22 Swanson Way, Claymore, 2559, VIC

\*Start Date Time 11 Jun 2019 at 12:50 pm

\*End Date Time 11 Jun 2019 at 1:50 pm

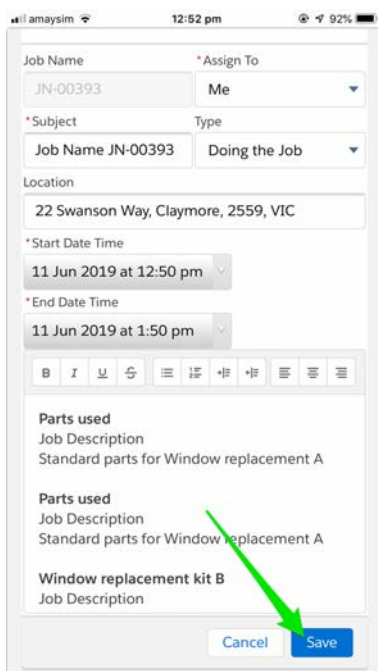
Parts used  
Job Description  
Standard parts for Window replacement A

Parts used  
Job Description  
Standard parts for Window replacement A

Window replacement kit B  
Job Description

Cancel Save

4. Review the other information. When correct, press **Save**.



amaysim 12:52 pm 92%

Job Name JN-00393 \*Assign To Me

\*Subject Job Name JN-00393 Type Doing the Job

Location 22 Swanson Way, Claymore, 2559, VIC

\*Start Date Time 11 Jun 2019 at 12:50 pm

\*End Date Time 11 Jun 2019 at 1:50 pm

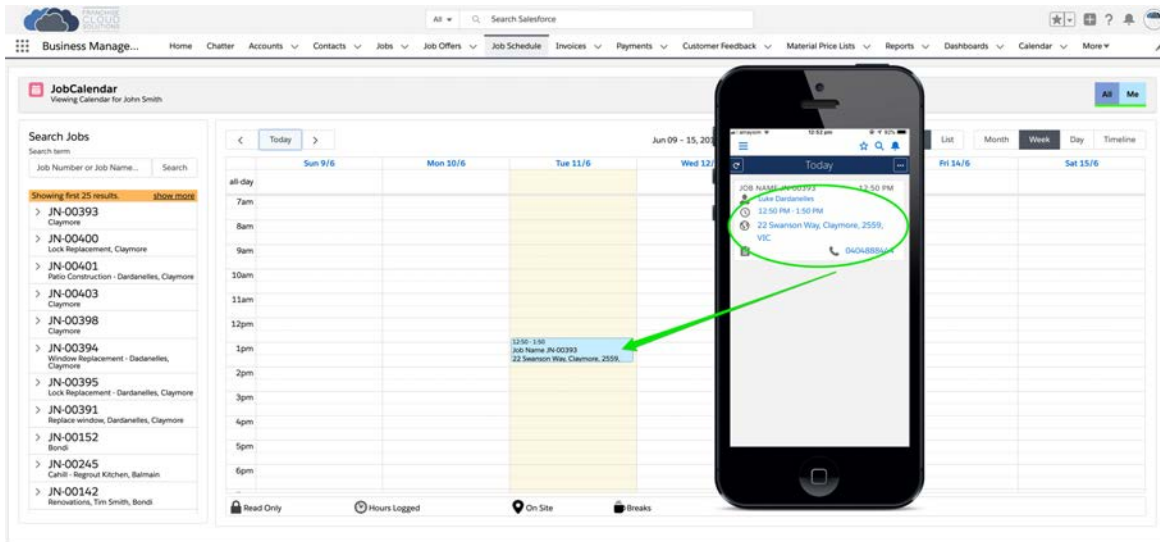
Parts used  
Job Description  
Standard parts for Window replacement A

Parts used  
Job Description  
Standard parts for Window replacement A

Window replacement kit B  
Job Description

Cancel Save

The Event will now appear within **Job Calendar** and **Job Calendar Mobile**.





# Taking notes, photos and videos in the field

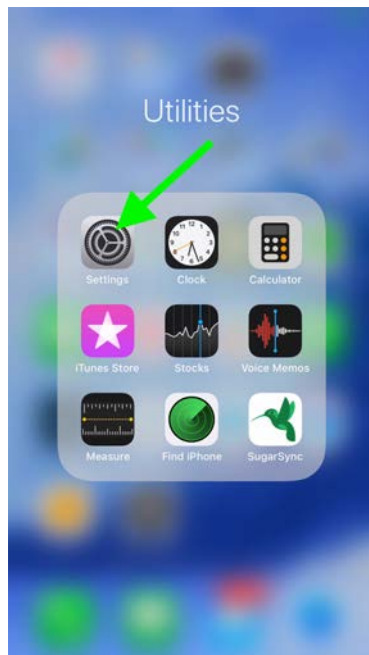
You can take notes in the field through

- » entering text on your phone
- » dictation (with automatic conversion to text)
- » filming video with verbal commentary

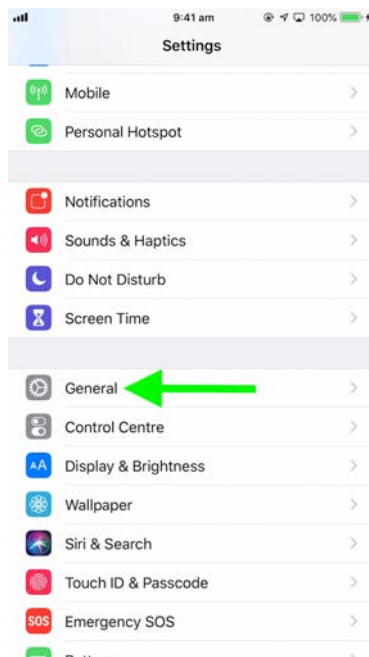


1. Set up your iOS device for automatic dictation.

a. Select **Settings**.



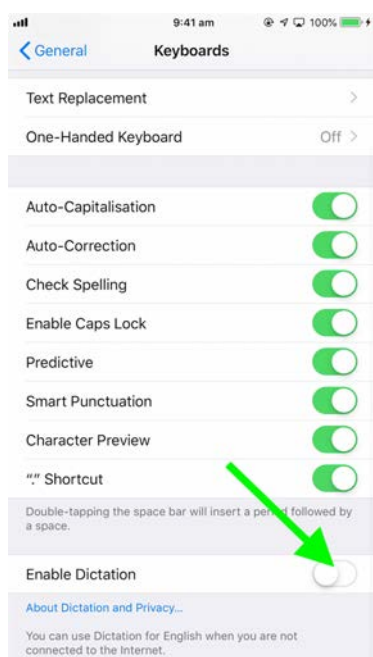
b. Select **General**.



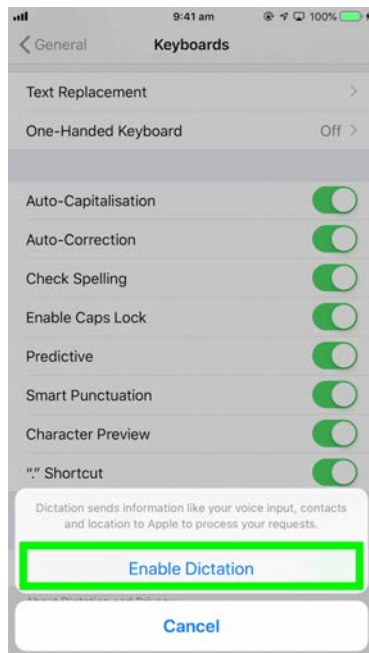
c. Select **Keyboard**.



d. Press **Enable Dictation**.

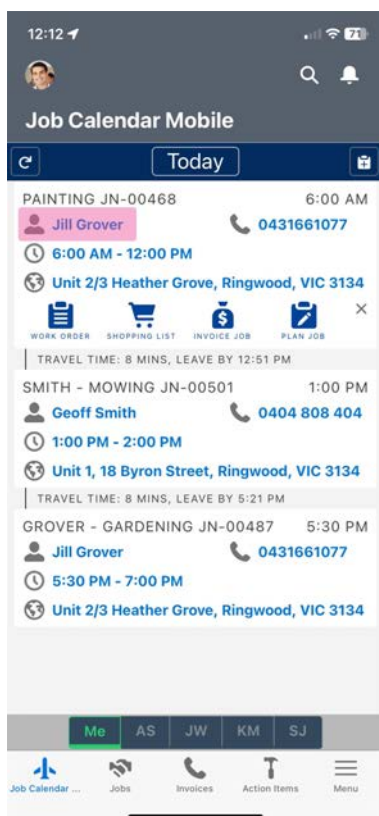


e. Confirm Enable Dictation.

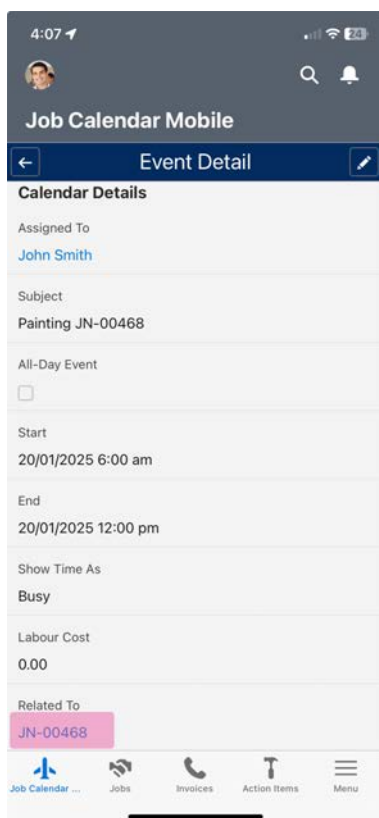


f. You are now ready to use your system as a dictation device.

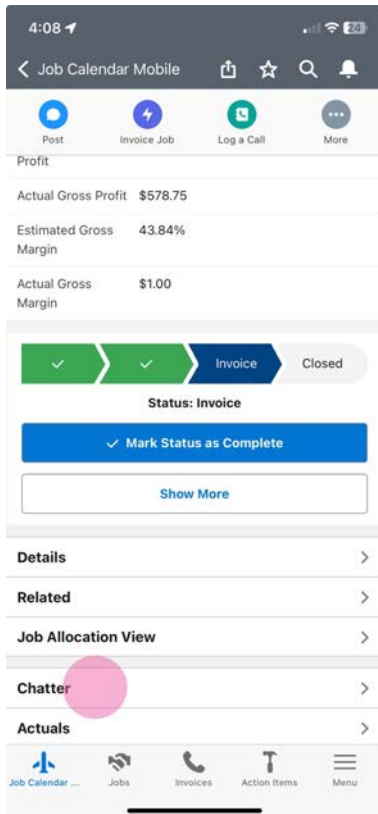
2. From the event summary, tap on the person's name.



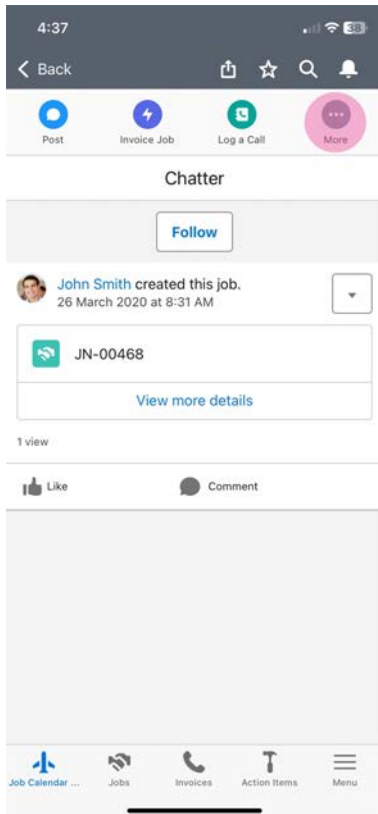
3. From the **Event Detail** screen, tap the Job number.



4. From the **Job**, tap the **Chatter** tab.

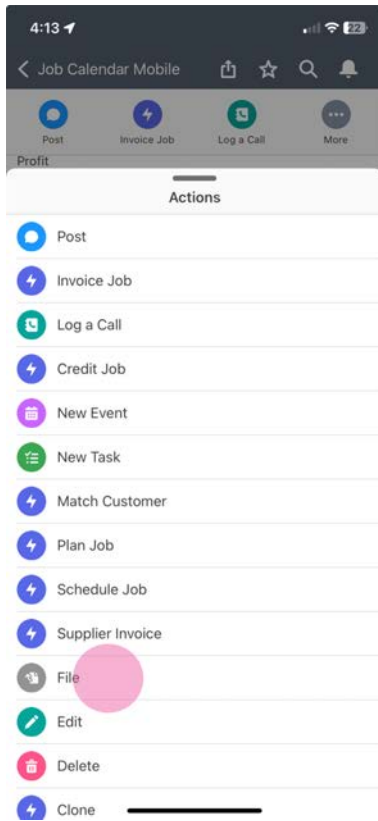


5. From the **Chatter** page, click the **More** button.

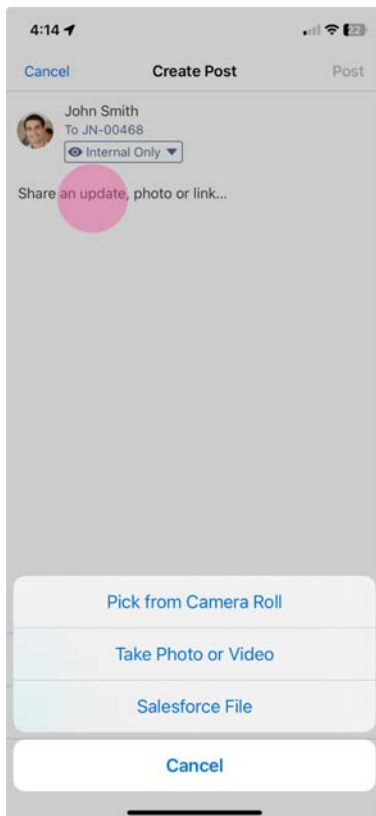




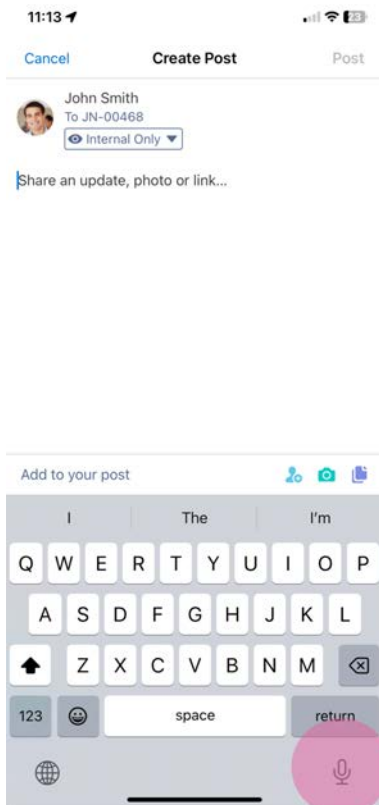
## 6. Tap File.



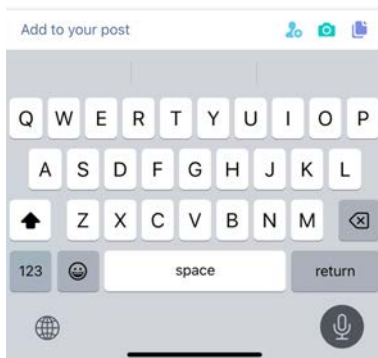
7. From the **Chatter** page, click on the default text in the Post.



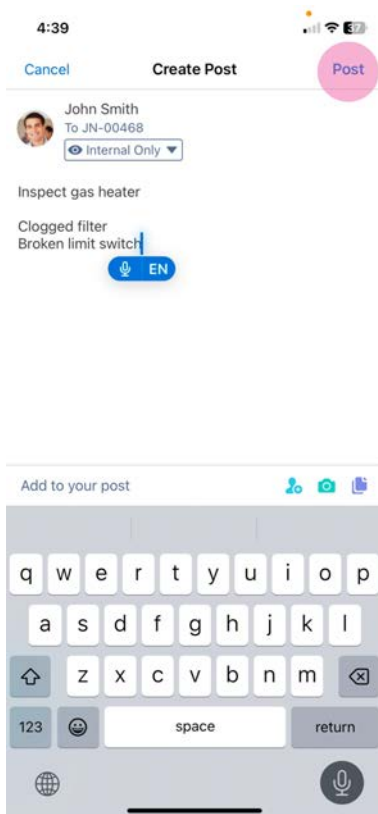
8. From the on-screen keyboard, tap the **Microphone** button.



9. Now dictate your note.



10. When you are finished, press the **Post** button.

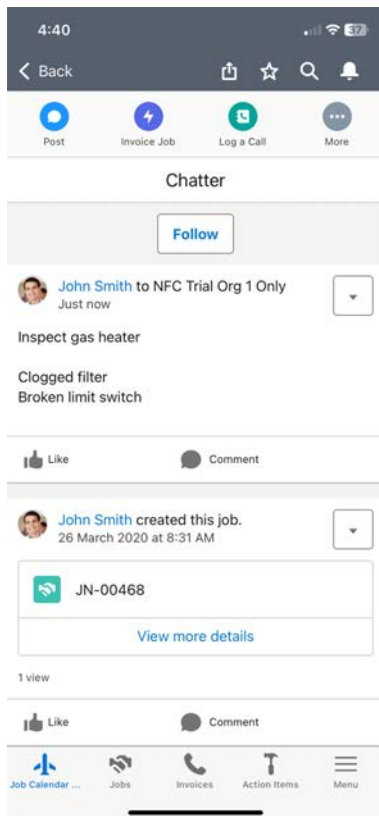


To end a sentence, say “Period”

For a new line, say “New line”

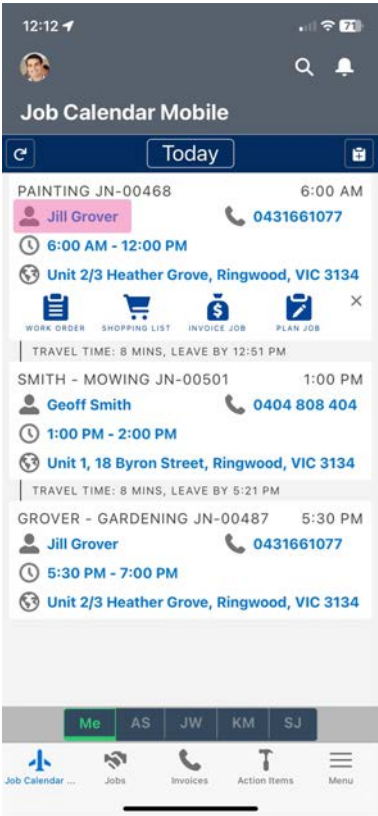
For a new paragraph, say “New paragraph”

11. The note is now added to the Chatter feed.

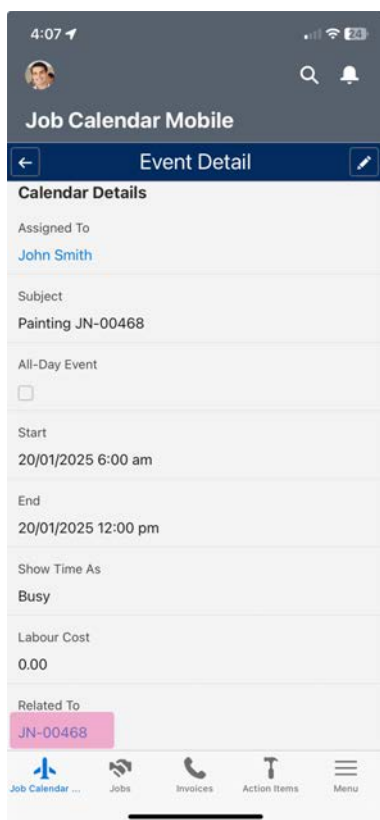


To record a video note

- 1. From the event summary, tap on the person’s name.

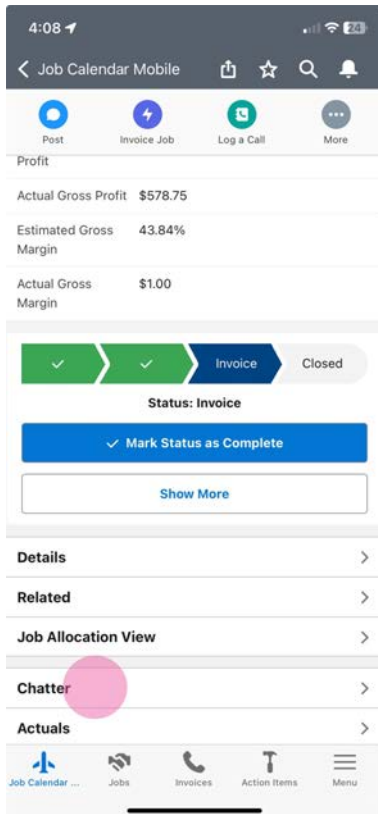


2. From the **Event Detail** screen, tap the Job number.

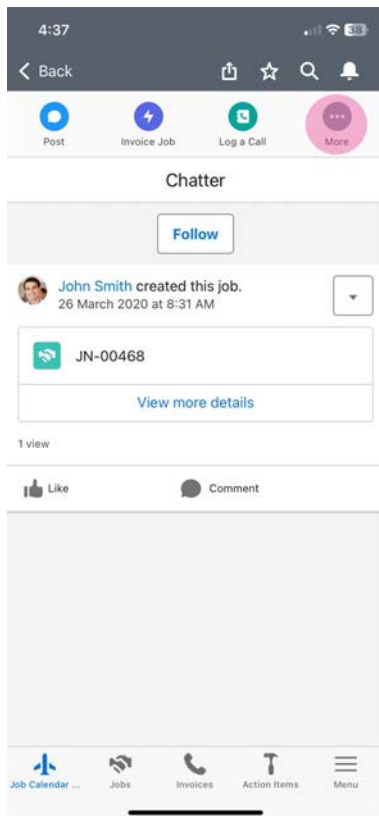




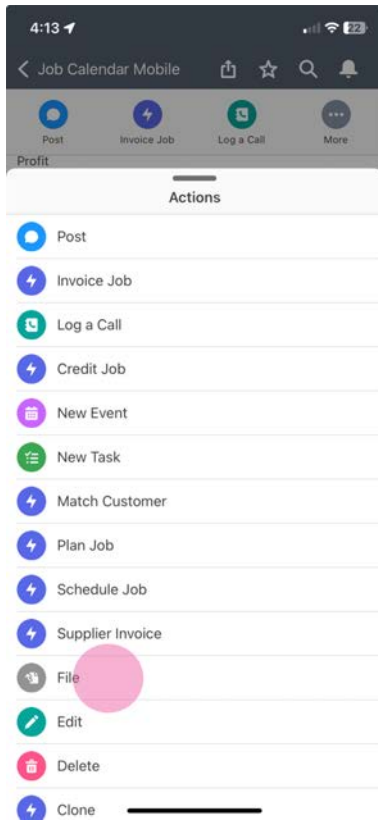
3. From the **Job**, tap the **Chatter** tab.



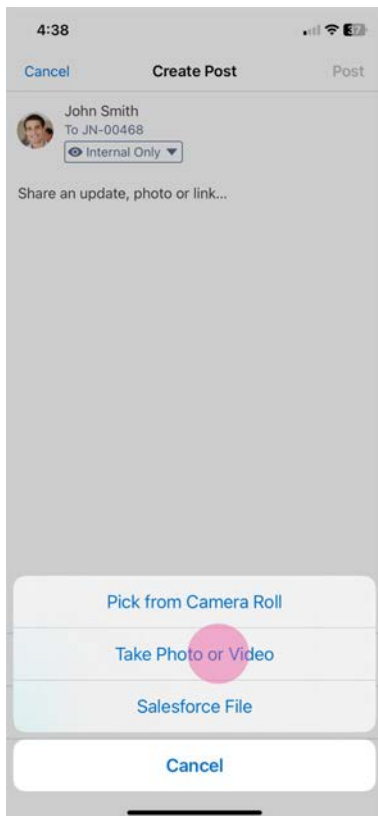
4. From the **Chatter** page, click the **More** button.



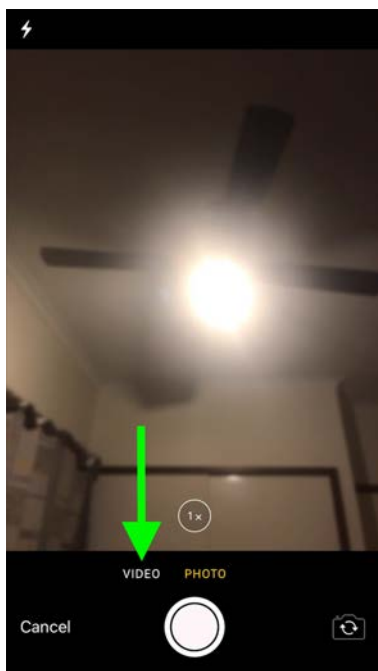
5. From the **Chatter** page, click the **File** button.



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.



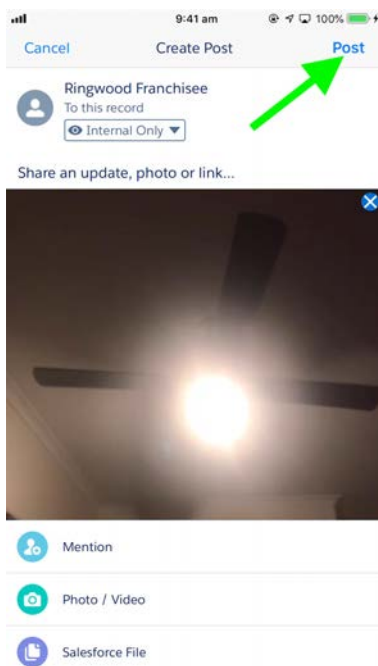
9. When finished, press the **Stop Record** button.



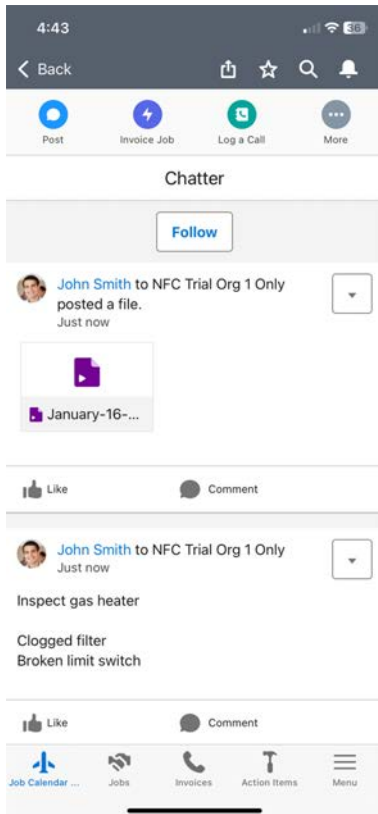
10. Press the **Use Video** button.



11. When you are finished, press the **Post** button.



12. The note is now added to the Chatter feed.



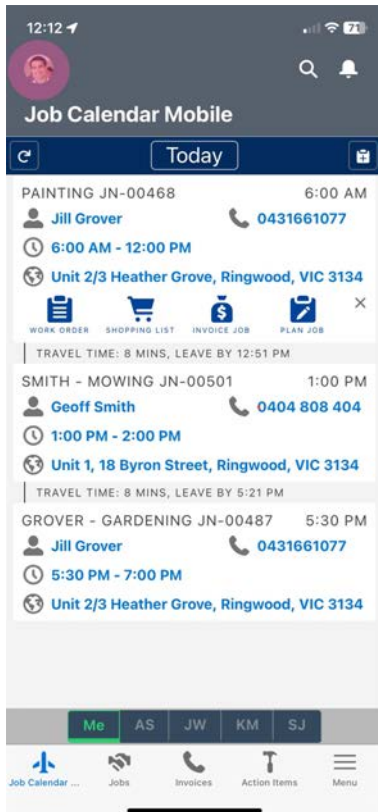
# Clearing cached screens and data

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.

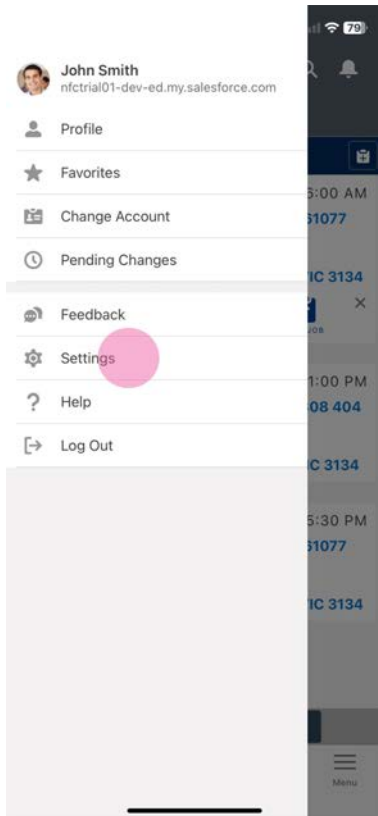
## To clear cached screens and data

1. From Job Calendar Mobile, tap the user icon.

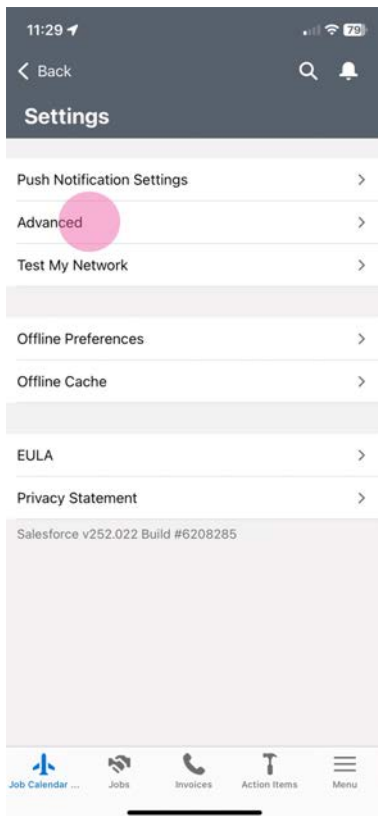




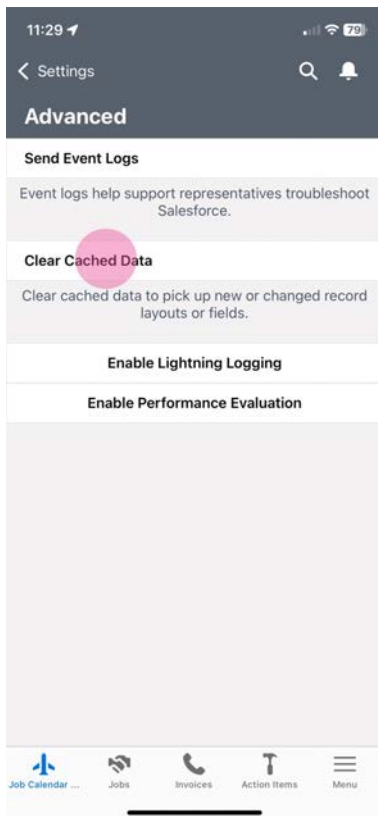
2. Then tap **Settings**.



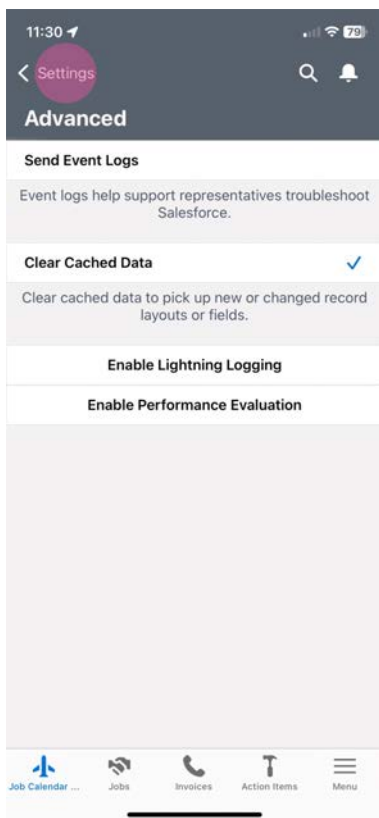
3. Now tap **Advanced**.



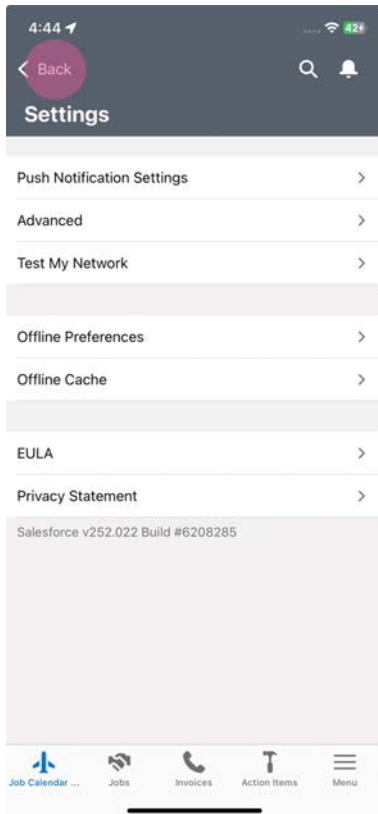
4. Tap the **Clear Cached Data** button.



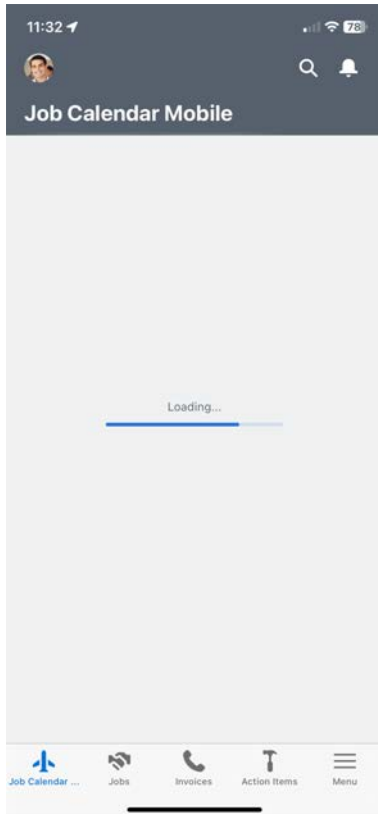
5. Now you can return to the home screen. Tap **Settings**.



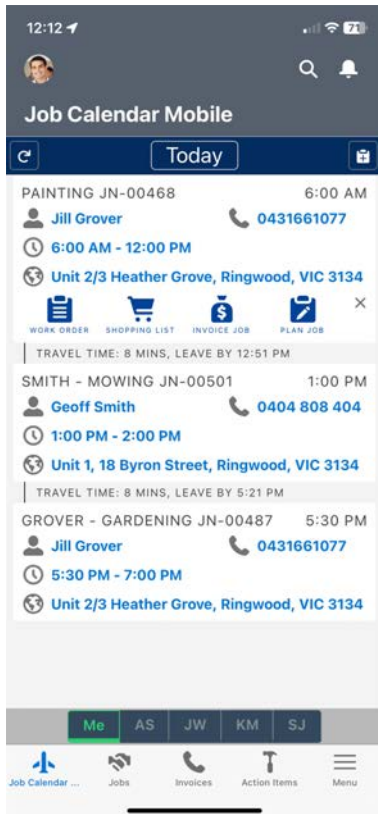
6. Now tap **Back** or **Job Cal Mobile**.



7. 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
How to locate the right record .....	ccclxvii
How to capture the outcomes of phone calls .....	ccclxxii
How to send an email .....	ccclxxiv
How to confirm a scheduled appointment with a customer .....	ccclxxviii
Working with emails and templates .....	ccclxxix
How to set up an email signature block .....	ccclxxix
How to review email template headers and footers .....	ccclxxxii
How to edit default email templates .....	ccclxxxv
How to create a custom email template .....	ccclxxxv
How to create a Quote email template .....	cccxcvi
How to create an Invoice email template .....	cccxcvii
Working with emails and syncing .....	cccxcviii
Understanding email sending, responses and syncing .....	cccxcviii
How to send all emails to my inbox .....	cd
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

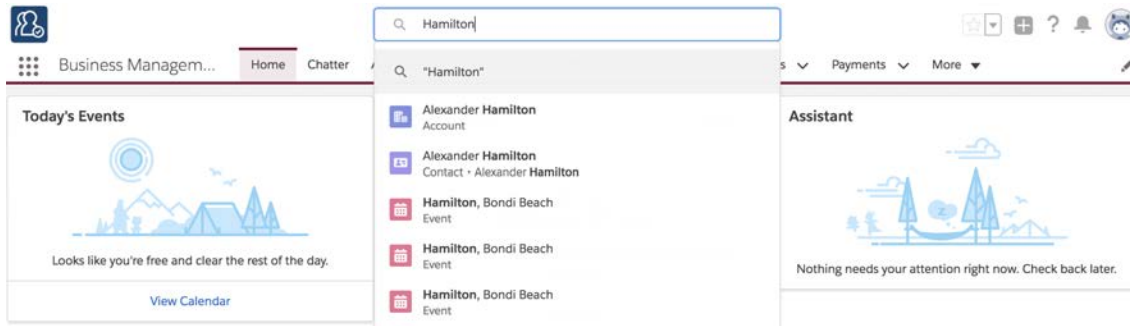
Business Management provides a range of tools for franchisees to be able to quickly and easily field customer requests. The following topics deal with a range of tasks common to Job, Account or Contact records, encompassing taking notes, creating follow up tasks, sending emails, and scheduling meetings.

## 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 the 'Account' page for 'Mr. Alexander Hamilton'. The interface includes a top navigation bar with options like 'Business Management...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', and 'More'. A search bar at the top right contains the text 'hamilton'. The account header shows 'Mr. Alexander Hamilton' with a '+ Follow', 'Edit', and 'Delete' button. Below this, fields for 'Title', 'Phone(2)', 'Email', and 'Account Owner' are visible. The main content area is divided into 'DETAILS' and 'RELATED' sections. The 'DETAILS' section includes fields for 'Account Name', 'Title', 'Mobile', 'Home Phone', 'Birthdate', 'Next Review Due Date', 'Address Information' (with 'Mailing Address' and 'Other Address'), and 'Invoice Summary Information' (including 'Tax Exempt', 'Total Invoice Amount', 'Amount Paid', 'Amount Outstanding', 'Credit Balance', 'Balance Payable', and 'Accounts Receivable Notes'). The 'RELATED' section shows 'Account Owner', 'Franchise', 'Email', 'Phone', and 'Fax'. On the right, the 'ACTIVITY' section features a 'New Event' button, a 'Create new...' input, and a list of activities including 'Wants to organise an i...', 'Additional meet...', and 'Returned your call'.

- » 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 a user named 'Mr. Alexander Hamilton'. The top navigation bar includes links for Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, and More. The 'Accounts' tab is selected, showing the account details for Mr. Alexander Hamilton, including his title, phone number (0431661889), email (alex.hamilton@gmail.com.ux), and account owner (Simon Walker).

The main content area is divided into two sections: 'DETAILS' and 'RELATED'. The 'RELATED' tab is active, showing a list of jobs associated with the account. The jobs are listed in a table with columns for Job Number, Job Name, Franchise, and Status. There are two jobs listed: JN-00161 (Hamilton, Bondi Beach, FCS Bondi Beach, Closed) and JN-00171 (Roofing, Bondi Beach, FCS Bondi Beach, Assigned). A 'View All' link is provided below the table.

Below the jobs table, there are sections for 'Customer Feedback (0)', 'Invoices (1)', and 'Files (0)'. The 'Invoices' section shows a table with columns for Invoice Number, Invoice Date, Status, and Type. One invoice is listed: INV-00009 (12/04/2018, Open, Full). A 'View All' link is provided below the table.

The right sidebar contains the 'ACTIVITY' and 'CHATTER' tabs. The 'ACTIVITY' tab is active, showing a 'New Event' section with a 'Create new...' button and an 'Add' button. Below this is an 'Activity Timeline' section with a 'Next Steps' section and a 'Past Activity' section. The 'Next Steps' section shows a task 'Wants to organise an i...' with a due date of 30/04. The 'Past Activity' section shows two activities: 'Additional meet...' (4:31 PM | Yesterday) and 'Returned your call' (Yesterday).

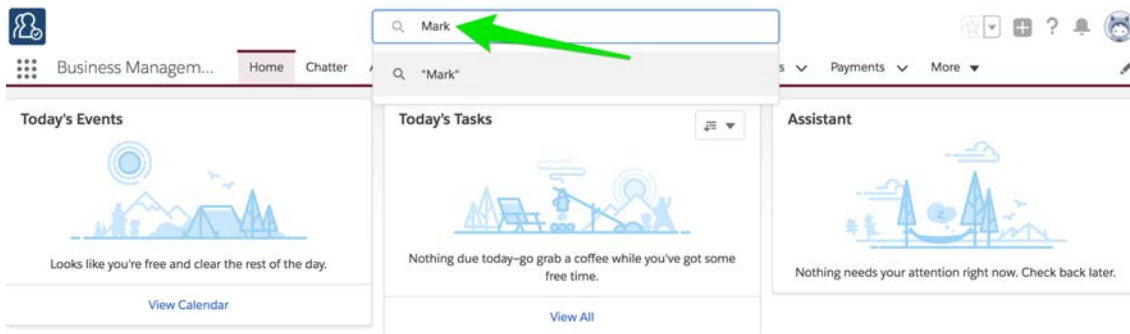
4. If the inquiry relates to a job you can reach the record by clicking on the record number.

The screenshot shows a CRM interface for an account named Mr. Alexander Hamilton. The top navigation bar includes links for 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' section contains three tables: 'Jobs (2)', 'Customer Feedback (0)', and 'Invoices (1)'. The 'Jobs' table has columns for Job Number, Job Name, Franchise, and Status. A green arrow points to the job number JN-00171. The 'Invoices' table has columns for Invoice Number, Invoice Date, Status, and Type. The 'Activity' section on the right shows a timeline of events, including a task 'Wants to organise an i...' and a meeting 'Additional meet...'. The 'Chatter' section shows a message 'Returned your call'.

JOB NUMBER	JOB NAME	FRANCHISE	STATUS
<a href="#">JN-00161</a>	Hamilton, Bondi Beach	FCS Bondi Beach	Closed
<a href="#">JN-00171</a>	Roofing, Bondi Beach	FCS Bondi Beach	Assigned

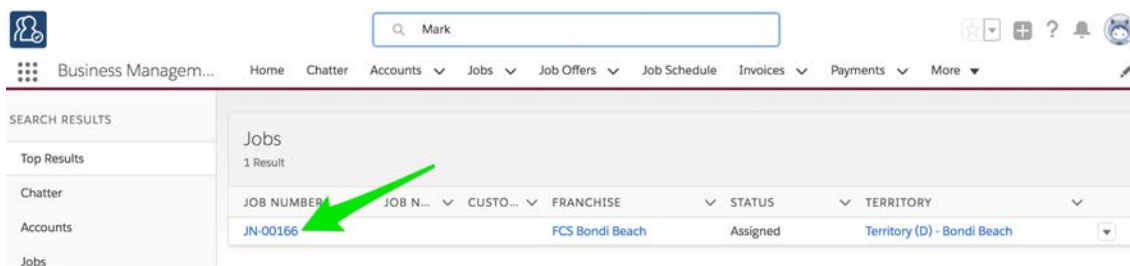
INVOICE NUMBER	INVOICE DATE	STATUS	TYPE
<a href="#">INV-00009</a>	12/04/2018	Open	Full

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...**

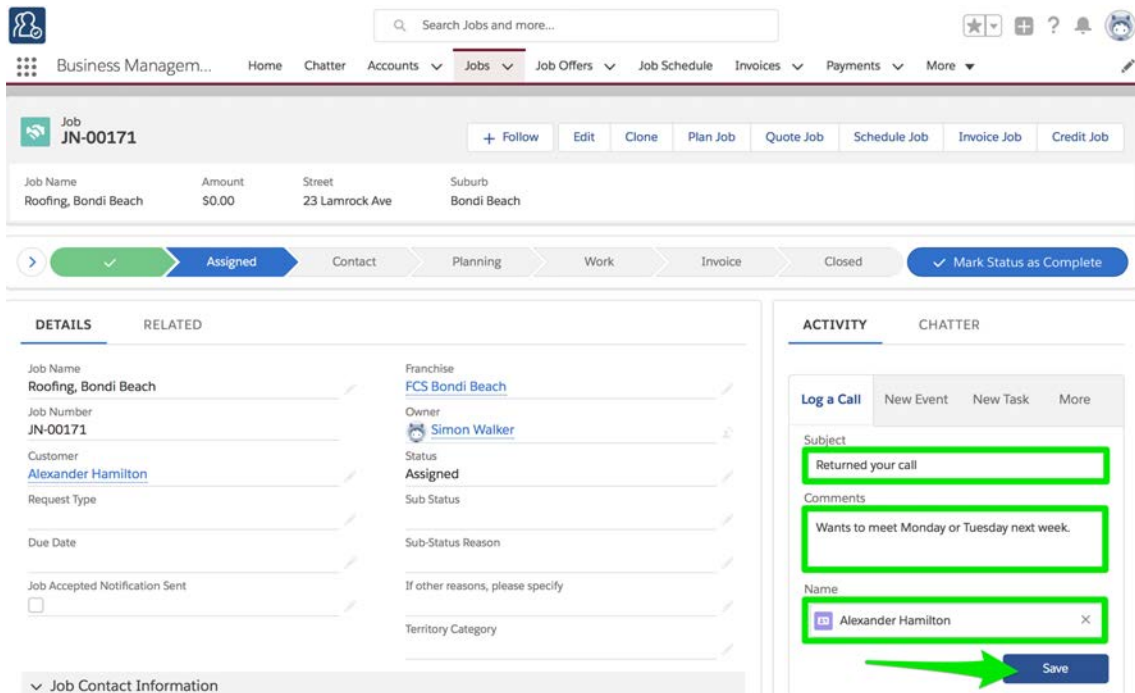
The screenshot shows the Business Manager interface for a job named 'Roofing, Bondi Beach' (JN-00171). The job status is 'Assigned'. The 'Activity' pane is open, showing the 'Log a Call' tab. A green arrow points to the 'Create new...' button in the 'Log a Call' section. The 'Log a Call' section also includes buttons for 'New Event', 'New Task', and 'More'. Below this, there is an 'Activity Timeline' section with a filter icon and an 'Expand All' button. The 'Next Steps' section shows 'No next steps. To get things moving, add a task or set up a meeting.' The 'Past Activity' section is also visible.

DETAILS	RELATED
Job Name Roofing, Bondi Beach	Franchise FCS Bondi Beach
Job Number JN-00171	Owner Simon Walker
Customer Alexander Hamilton	Status Assigned
Request Type	Sub Status
Due Date	Sub-Status Reason
Job Accepted Notification Sent <input type="checkbox"/>	If other reasons, please specify
	Territory Category

The **Log a Call** activity pane displays.



### 3. Complete the details and press **Save**.



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

Job JN-00171 + Follow Edit Clone Plan Job Quote Job Schedule Job Invoice Job Credit Job

Job Name: Roofing, Bondi Beach Amount: \$0.00 Street: 23 Lamrock Ave Suburb: Bondi Beach

Assigned Contact Planning Work Invoice Closed Mark Status as Complete

**DETAILS** RELATED

Job Name: Roofing, Bondi Beach Franchise: FCS Bondi Beach  
Job Number: JN-00171 Owner: Simon Walker  
Customer: Alexander Hamilton Status: Assigned  
Request Type: Sub Status:  
Due Date: Sub-Status Reason:  
Job Accepted Notification Sent: If other reasons, please specify:  
Territory Category:

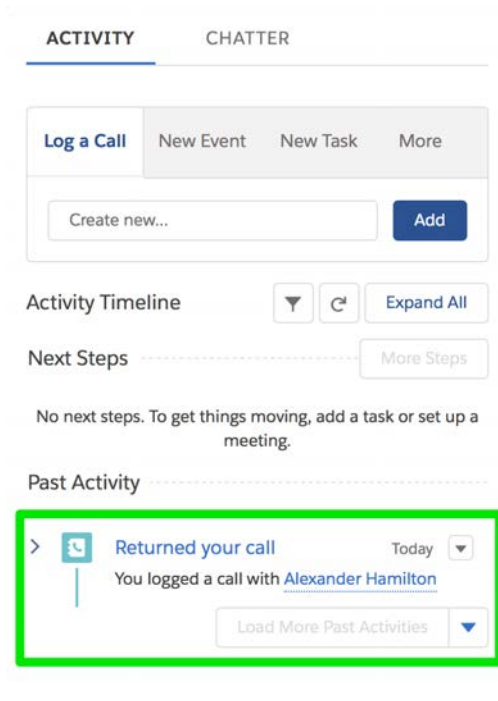
**ACTIVITY** CHATTER

Log a Call New Event New Task More

Subject: Returned your call  
Comments: Wants to meet Monday or Tuesday next week.  
Name: Alexander Hamilton

Save

The call is saved to the record's **Activity Timeline**.



**ACTIVITY** CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activity

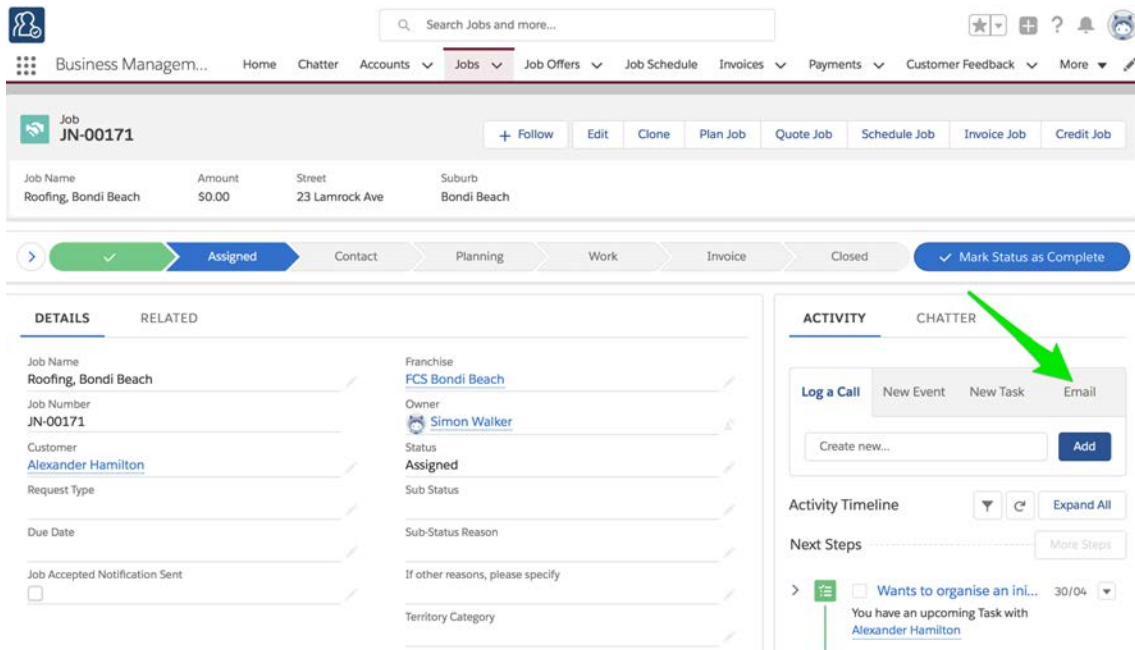
> Returned your call Today  
You logged a call with Alexander Hamilton  
Load More Past Activities

## 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 (JN-00171). The 'Activity' pane on the right is active, and the 'Email' tab is selected, indicated by a green arrow. The 'Email' tab shows options to 'Log a Call', 'New Event', 'New Task', and 'Email'. Below these options is a 'Create new...' field and an 'Add' button. The 'Activity Timeline' section shows a list of activities, including 'Wants to organise an ini...' with a date of 30/04. The 'Next Steps' section shows a task '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 'Business Management' interface. At the top, a navigation bar includes 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Payments', 'Customer Feedback', and 'More'. The 'Jobs' section is active, showing job details for 'JN-00171' (Roofing, Bondi Beach). Below this, a progress bar indicates the current stage is 'Assigned'. The main content area is divided into 'DETAILS' and 'RELATED' sections. In the 'DETAILS' section, a contact card for 'Alexander Hamilton' is visible. A green arrow labeled '1' points to the 'Copy Email Address' button in the contact card's context menu. Another green arrow labeled '2' points from the copied email address to the 'To' field in the 'Email' composition window on the right. The 'Email' window shows the 'From' field as 'Simon Walker <simon.walker@franchisclo...>' and the 'To' field as 'simon.walker@franchisclo...'. The 'Subject' field is empty, and the 'Send' button is at the bottom right.

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

Job JN-00171 + Follow Edit Clone Plan Job Quote Job Schedule Job Invoice Job Credit Job

Job Name Amount Street Suburb  
Roofing, Bondi Beach \$0.00 23 Lamrock Ave Bondi Beach

Assigned Contact Planning Work Invoice Closed Mark Status as Complete

DETAILS RELATED

Job Name Roofing, Bondi Beach  
Job Number JN-00171  
Customer Alexander Hamilton  
Request Type  
Due Date  
Job Accepted Notification

Alexander Hamilton  
Title  
Phone 0431661889  
Email alex.hamilton@franchisclo.com  
Mobile 0631  
Copy Email Address  
Share  
Inspect Element  
Services

Job Contact Information

Salutation  
First Name Alexander  
Last Name Hamilton  
Company  
Email  
Mobile

Street 23 Lamrock Ave  
Suburb Bondi Beach  
Postcode 2026  
Country Australia  
State NSW  
Map Job View Google Map

ACTIVITY CHATTER

Log a Call New Event New Task Email

\* From Simon Walker <simon.walker@franchisclo...>  
To  
Cc  
Bcc simon.walker@franchisclo...  
Subject Enter Subject...

Font Size B I U A

Powered by Salesforce  
http://www.salesforce.com/

Related To JN-00171

Send

#### 4. Complete Subject and Details then press Send.

The screenshot displays the 'Business Management' system interface. At the top, there's a navigation bar with tabs: Home, Chatter, Accounts, Jobs (selected), Job Offers, Job Schedule, Invoices, Payments, Customer Feedback, and More. A search bar is also present. Below the navigation bar, the 'Job JN-00171' details are shown, including Job Name (Roofing, Bondi Beach), Amount (\$0.00), Street (23 Lamrock Ave), and Suburb (Bondi Beach). A progress bar indicates the job status: Assigned (active), Contact, Planning, Work, Invoice, and Closed. A 'Mark Status as Complete' button is available.

The 'DETAILS' section is divided into 'Job Information' and 'Job Contact Information'. The 'Job Information' section includes fields for Job Name, Job Number, Customer, Request Type, Due Date, Job Accepted Notification Sent, Franchise, Owner, Status, Sub Status, Sub-Status Reason, and Territory Category. The 'Job Contact Information' section includes fields for Salutation, First Name, Last Name, Company, Email, Mobile, Other Phone, and Job Description.

The 'ACTIVITY' section shows a list of activities: Log a Call, New Event, New Task, and Email (selected). The 'Email' composition window is open, showing the 'From' field (Simon Walker), 'To' field (Alexander Hamilton), 'Bcc' field (simon.walker@franchisclo...), and 'Subject' field (Additional meeting times). The email body contains the text: 'Hi Alexander', 'Just checked my schedule. I'm also available on the 15th and 18th. Is that of interest?', and 'Yours, Simon'. A green box highlights the 'Subject' field and the email body text. A green arrow points to the 'Send' button.

The email is sent and is added to the **Past Activity**.

The screenshot displays the 'Business Management' interface for a specific job, 'JN-00171'. The top navigation bar includes links for Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, Customer Feedback, and More. The job details section shows the job name 'Roofing, Bondi Beach', amount '\$0.00', street '23 Lamrock Ave', and suburb 'Bondi Beach'. A progress bar indicates the job is in the 'Assigned' stage. The 'DETAILS' tab is active, showing fields for Job Name, Job Number, Customer, Request Type, Due Date, Job Accepted Notification Sent, Franchise, Owner, Status, Sub Status, Sub-Status Reason, and Territory Category. The 'Job Contact Information' section shows the contact's name 'Alexander Hamilton' and address '23 Lamrock Ave, Bondi Beach, 2026'. The 'ACTIVITY' tab is also visible, showing a list of activities. The 'Email' activity is highlighted with a green box, showing the subject 'Additional meeting times' and the time '4:31 PM | Today'. The activity description reads 'You sent an email to 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 'Email' activity form in the 'ACTIVITY' tab. The form includes fields for 'From' (REC Sales Manager <mike@franchisec...>), 'To' (Alexander Ivanov), and 'Related To' (Alexander Ivanov). A 'Send' button is visible. A green box highlights the 'Email' icon in the bottom toolbar, which also contains icons for Log a Call, New Event, New Task, and Chatter.

## 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?

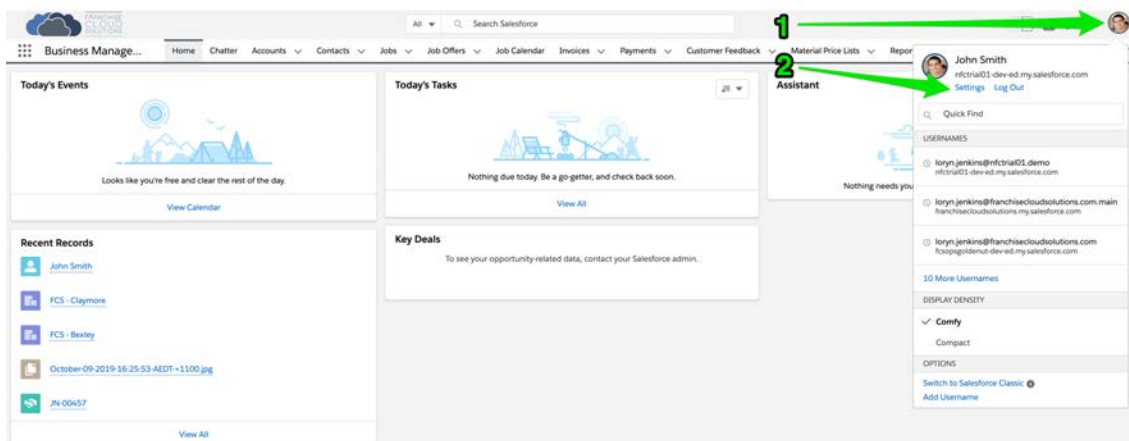
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Each user can set up their own standard signature block. Systems administrators are required to set up rich text signatures.



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**.



### 3. Go to My Email Settings.

The screenshot shows the Salesforce 'Personal Information' page. The left sidebar contains a navigation menu with the following items: 'My Personal Information', 'Advanced User Details', 'Approver Settings', 'Change My Password', 'Connections', 'Grant Account Login Access', 'Language & Time Zone', 'Login History', 'Personal Information', 'Reset My Security Token', 'Security Central', 'Display & Layout', 'Email', 'My Email Settings', 'My Email to Salesforce', 'My Unresolved Items', 'Chatter', 'Calendar & Reminders', 'Desktop Add-Ons', and 'Import'. The 'Email' section is expanded, and 'My Email Settings' is highlighted. Two green arrows point to 'My Email Settings' and 'My Email to Salesforce' in the sidebar. The main content area shows the 'Personal Information' page with fields for 'Details', 'Address', and 'My Work Information'. The 'Details' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Phone, Extension, Fax, and Mobile. The 'Address' section includes fields for Street, City, State/Province, Zip/Postal Code, and Country. The 'My Work Information' section includes fields for Company Name, Title, Department, Division, Employee Number, Start of Day, and End of Day.

### 4. Paste the URL provided by your system administrator.

The screenshot shows the Salesforce 'My Email Settings' page. The left sidebar contains a navigation menu with the following items: 'My Personal Information', 'Advanced User Details', 'Approver Settings', 'Authentication Settings for External Systems', 'Change My Password', 'Connections', 'Grant Account Login Access', 'Language & Time Zone', 'Login History', 'Personal Information', 'Security Central', 'Display & Layout', 'Email', 'My Email Settings', 'My Email to Salesforce', 'My Unresolved Items', 'Chatter', 'Calendar & Reminders', 'Desktop Add-Ons', and 'Import'. The 'Email' section is expanded, and 'My Email Settings' is highlighted. The main content area shows the 'My Email Settings' page with fields for 'Outgoing Email Settings', 'Email Signature', and 'Subscriptions'. The 'Outgoing Email Settings' section includes fields for 'How would you like your name to appear on your outgoing email?', 'What email address would you like to use as your return address?', 'Would you like to automatically BCC emails to your return address?', and 'This signature will be added to your outgoing emails'. The 'Email Signature' field is highlighted with a green box. The 'Subscriptions' section includes checkboxes for 'Send Apex Warning Emails', 'Receive Salesforce CRM Content Email Alerts', and 'Receive Salesforce CRM Content Alerts as Daily Digest'.



## 5. Press Save.

The screenshot shows the 'My Email Settings' page in Salesforce Business Manager. The left sidebar contains navigation links for Personal Information, Email, Chatter, and Desktop Add-Ons. The main content area is titled 'My Email Settings' and includes sections for 'Outgoing Email Settings' and 'Subscriptions'. The 'Outgoing Email Settings' section contains fields for 'How would you like your name to appear on your outgoing email?', 'What email address would you like to use as your return address?', 'Would you like to automatically BCC emails to your return address?', and 'This signature will be added to your outgoing emails'. A green arrow points to the 'Save' button at the bottom right of the settings section.

## 6. The email signature block will now appear within your emails.

The screenshot shows the 'Contact' page for 'Mr. Bob Smith' in Salesforce Business Manager. The page displays contact details, including name, account name, phone, and email. The 'Email' section on the right shows an email template with a signature block for 'Kerryn Miller, Support & Training Agent'. The signature block includes the name, title, phone number, email address, and website URL.

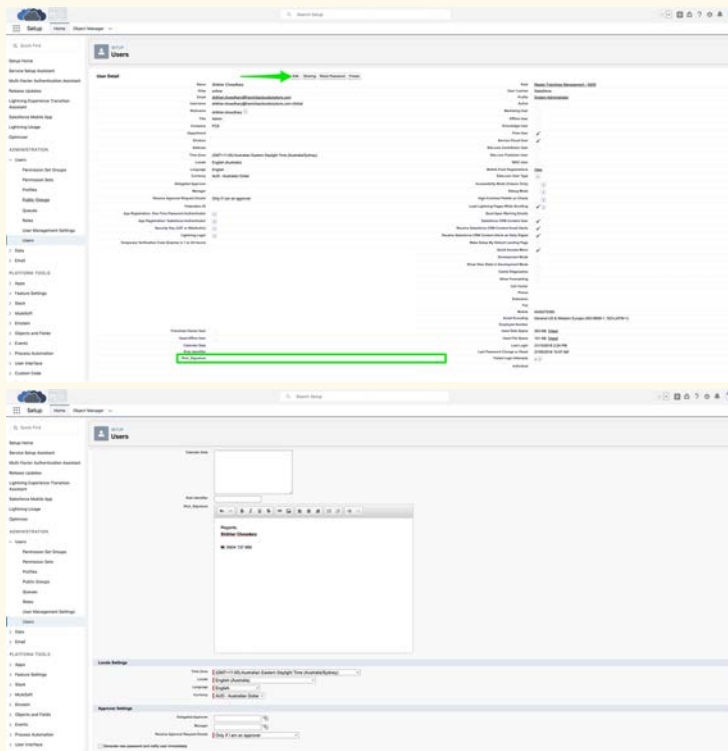


If you use templates, each template will need to contain your signature block and you will need to have a completed email signature block.



## 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.

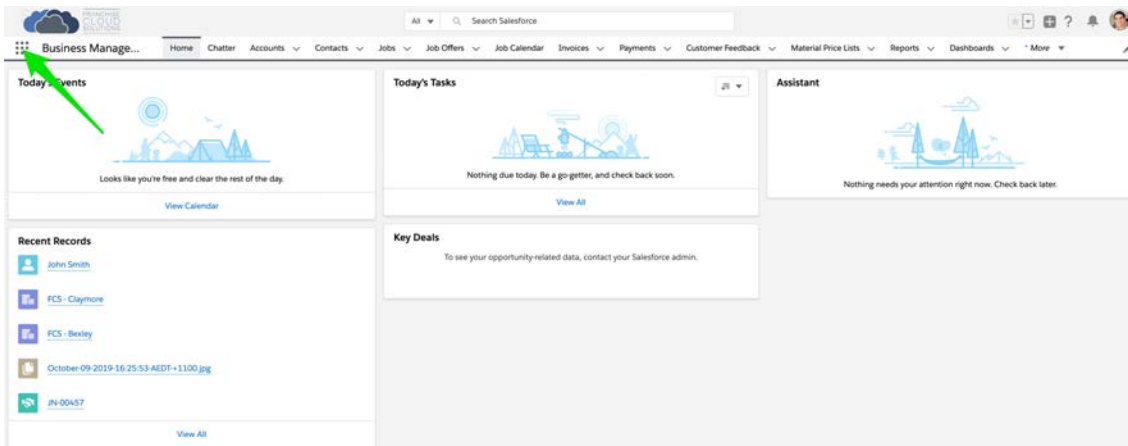


## How to review email template headers and footers

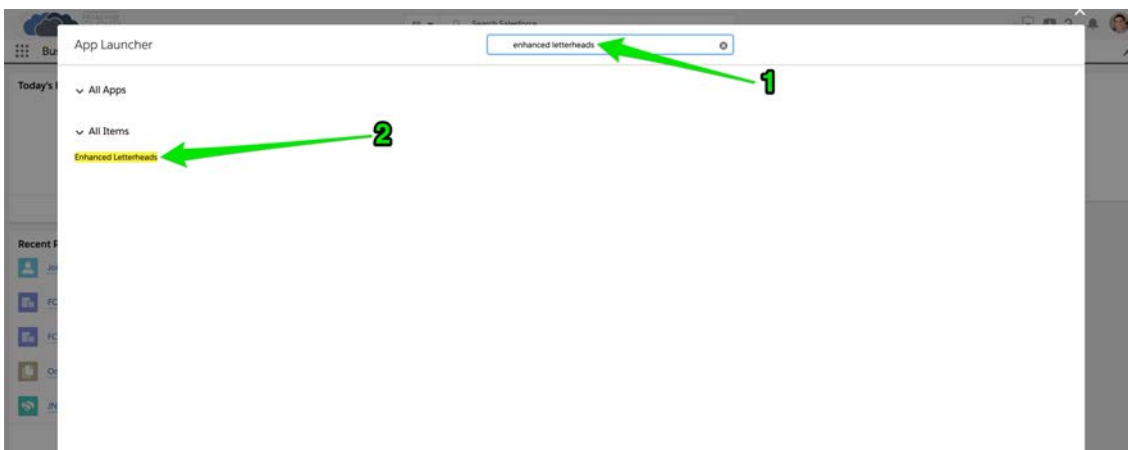
Most likely your franchisor will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

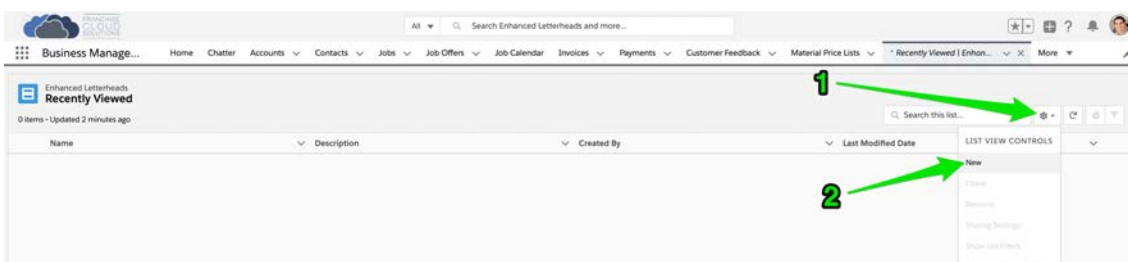
1. Open the App Launcher.



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

Search this list...

Name ↑	Created By	Last Modified Date	Description
1 FCS Standard Letterhead	ljerk	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 FCS Standard Letterhead Description

Letterhead Content

Header

FRANCHISE CLOUD SOLUTIONS

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.

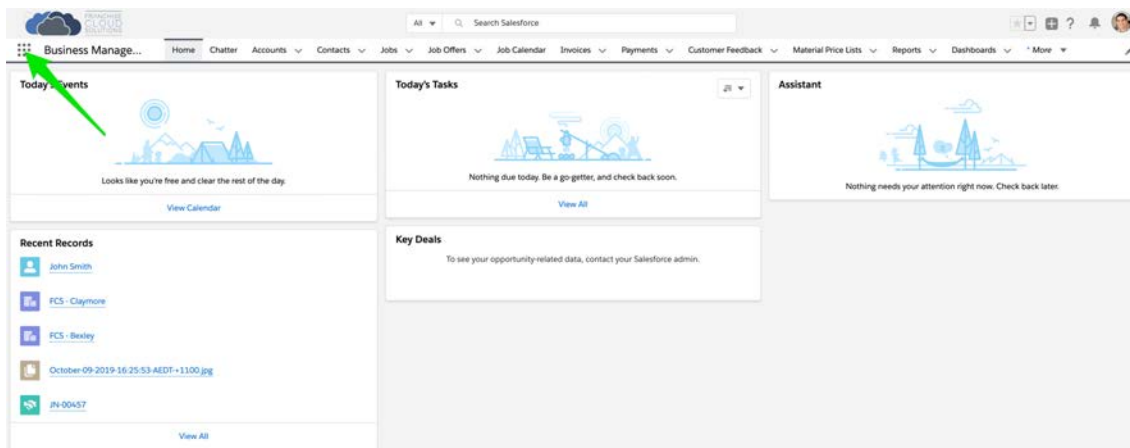


Email templates that are frequently created by our clients include

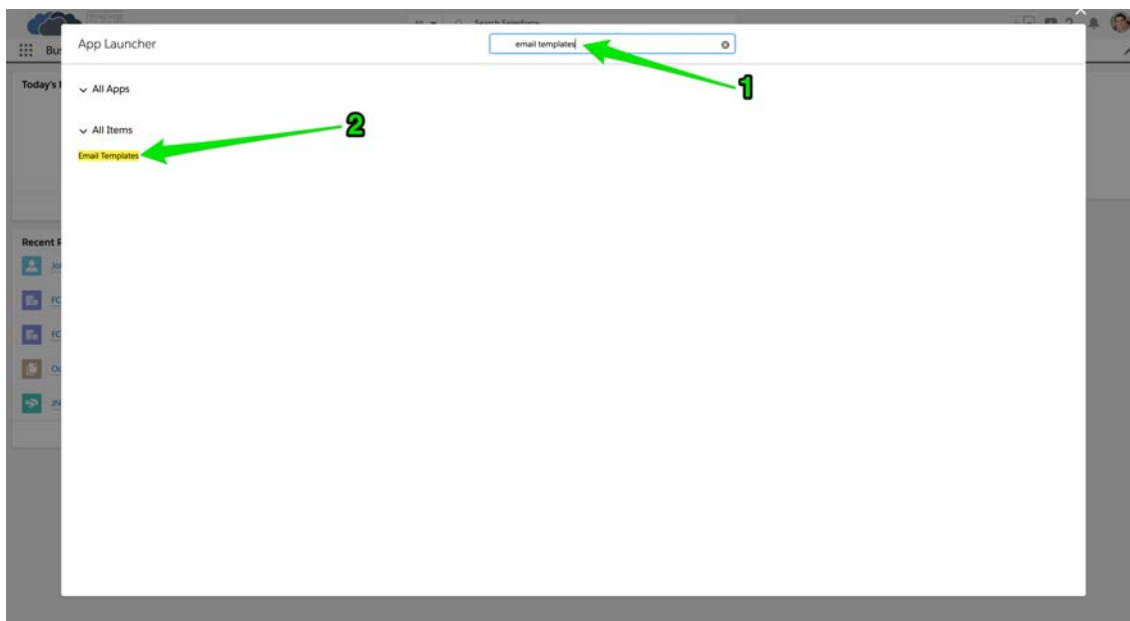
- » New customer initial contact
- » Returning customer initial contact
- » New Quote Job request
- » New Do & Charge Job request
- » Scheduled appointment notification
- » Quote email
- » Invoice email
- » Invoice overdue

## To create a custom email template

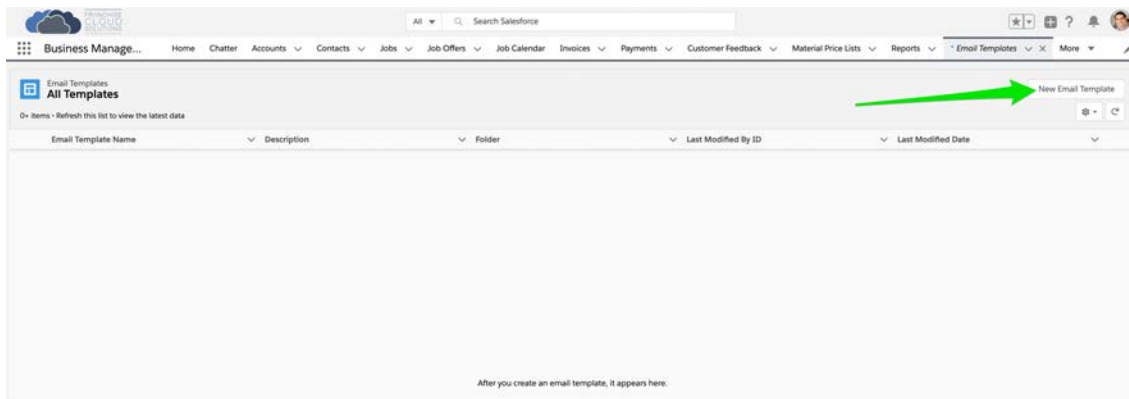
1. Open the App Launcher.



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: -- None --

Description:  Folder: Private Email Templates

**Message Content**

Subject:  Enhanced Letterhead: Search Enhanced Letterheads...

HTML Value

Source Font Size 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

My Quote Email Template

Description

Related Entity Type

-- None --

Catalog Profile

Check-In

Contact

Course

Customer Feedback

DocuSign Recipient Status

DocuSign Status

Instructor

Invoice

**Job**

Job Offer

Message Content

Subject

HTML Value

Source

Font

Size

**B**

*I*

U

**A**

(1)

Additional Information

Created By

Last Modified By

Cancel

Save



6. Enter an email subject line.

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

Search Enhanced Letterheads...

HTML Value

SourceFontSizeBBIUAAListTableLinkImage

Additional Information

Created By

Last Modified By

Cancel

Save

7. Select an appropriate letterhead.

### New Email Template

#### Information

\* Email Template Name  
My Quote Email Template

Description

Related Entity Type  
Job

Folder  
Private Email Templates

#### Message Content

Subject  
FCS Invoice - {{{FCS\_OPS\_\_Job\_\_c.Name}}}

Enhanced Letterhead  

Search Enhanced Letterheads...

FCS Standard Letterhead

HTML Value  

Source Font Size B I U A 1 2 3 4 5 6 7 8 9 10 11 12 14 16 18 20 22 24 26 28 30 32 34 36 38 40 42 44 46 48 50 52 54 56 58 60 62 64 66 68 70 72 74 76 78 80 82 84 86 88 90 92 94 96 98 100

#### Additional Information

Created By

Last Modified By

Cancel

Save



You can review the available letterheads. See “How to review email template headers and footers” on page ccclxxii.

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

Source Font Size B I U A [List Icons] [Link Icon] [Image Icon]

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

CHAPTER 11 | Working with emails and templates

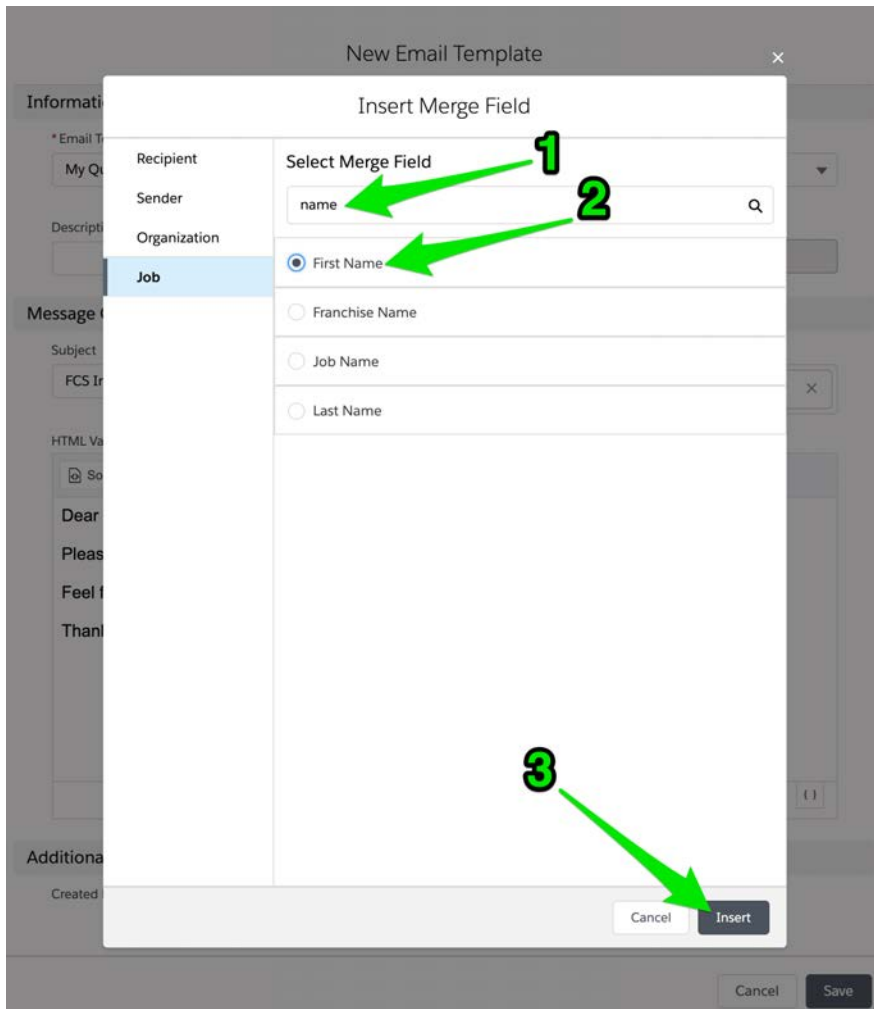
CCCXCii

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).

The screenshot shows a 'New Email Template' window with a sub-dialog titled 'Insert Merge Field'. On the left, a sidebar lists categories: 'Recipient' (highlighted with a green box), 'Sender', 'Organization', and 'Job'. The main area, titled 'Select Merge Field', contains a search bar and a list of merge fields. The first item, '# Contacts', is selected with a radio button and has a 'Contact' tag. Other fields include 'Accepts Reference Calls', 'Assistant's Name', 'Asst. Phone', 'Birthdate', 'Business Fax', 'Business Phone', 'Contact Description', 'Contact ID', 'Created By ID', 'Created Date', and 'Data.com Key', each with a 'Contact' tag. At the bottom of the sub-dialog are 'Cancel' and 'Insert' buttons. The background window shows fields for 'Email Template Name', 'Description', 'Subject', 'HTML Value', and 'Additional Information'.

Category	Merge Field	Type
Recipient	# Contacts	Contact
Recipient	Accepts Reference Calls	Contact
Recipient	Assistant's Name	Contact
Recipient	Asst. Phone	Contact
Recipient	Birthdate	Contact
Recipient	Business Fax	Contact
Recipient	Business Phone	Contact
Recipient	Contact Description	Contact
Recipient	Contact ID	Contact
Recipient	Created By ID	Contact
Recipient	Created Date	Contact
Recipient	Data.com Key	Contact

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

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 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

Cancel

Save

Remember to test your template before sending it to the first customer.

CCCXCV

Business Management User Guide



## 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 ccclxxxv.
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 ccclxxxv.
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.

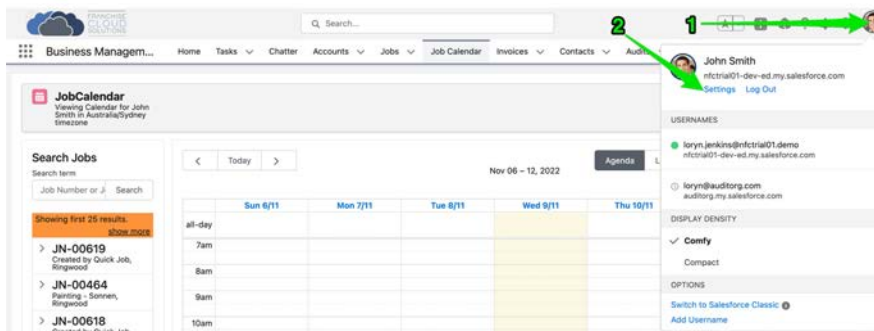
- » “Installing the Salesforce extension for Office 365” on the next page
- » “Installing the Chrome Salesforce extension for GSuite” on page cdvii
- » “Logging email using Salesforce extensions” on page cdxi
- » “Logging events using Salesforce extensions” on page cdxi

## How to send all emails to my inbox

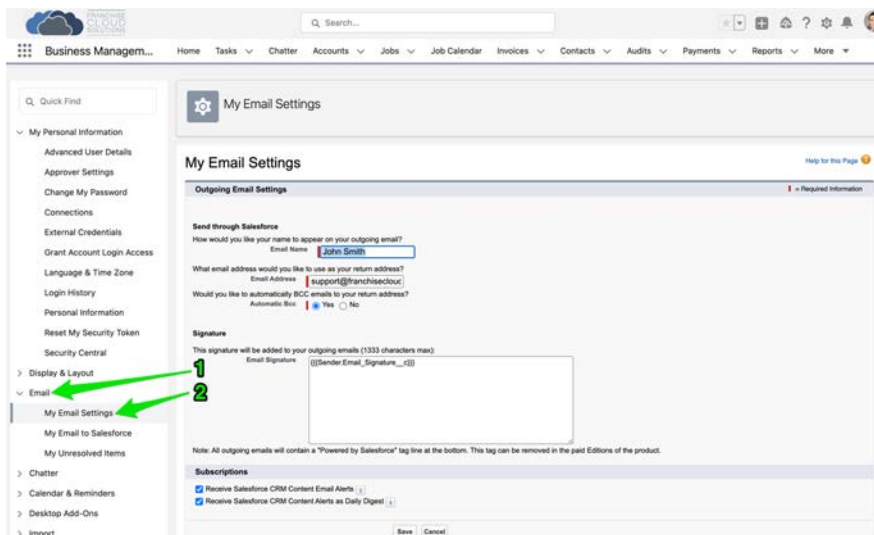
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

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.

The screenshot shows the 'My Email Settings' page in the Salesforce Business Management interface. The left sidebar contains navigation links for Personal Information, Display & Layout, Email, Chatter, Calendar & Reminders, Desktop Add-Ons, and Import. The main content area is titled 'My Email Settings' and includes sections for 'Outgoing Email Settings', 'Signature', and 'Subscriptions'. In the 'Outgoing Email Settings' section, the 'Automatic Bcc' checkbox is checked, and a green arrow labeled '1' points to it. The 'Signature' section shows a text area for the email signature. The 'Subscriptions' section has two checkboxes: 'Receive Salesforce CRM Content Email Alerts' and 'Receive Salesforce CRM Content Alerts as Daily Digest', both of which are checked. A green arrow labeled '2' points to the 'Save' button at the bottom of the page.



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

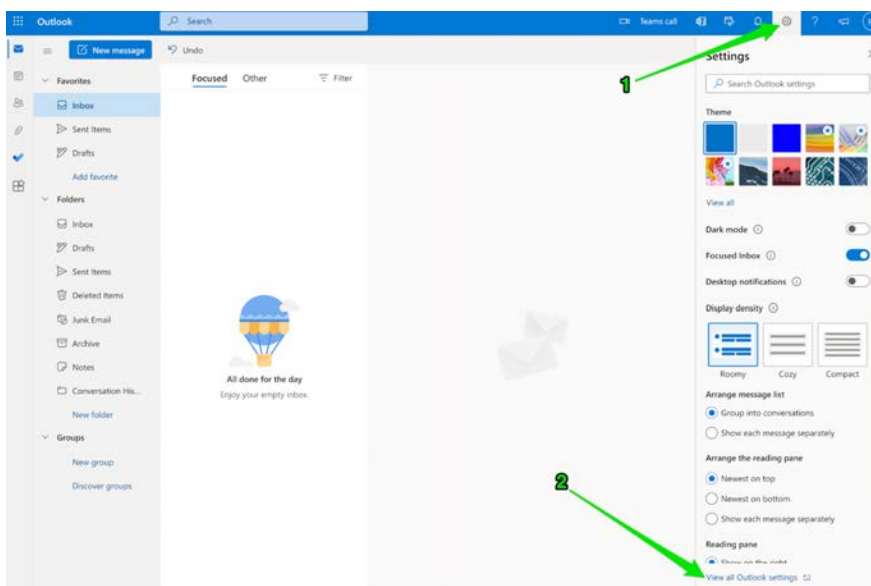
The Salesforce extension for Office 365 provides you control as to

- » which Outlook 365 emails or events are logged from your email system into Salesforce
- » which Salesforce records the email or event is logged against.

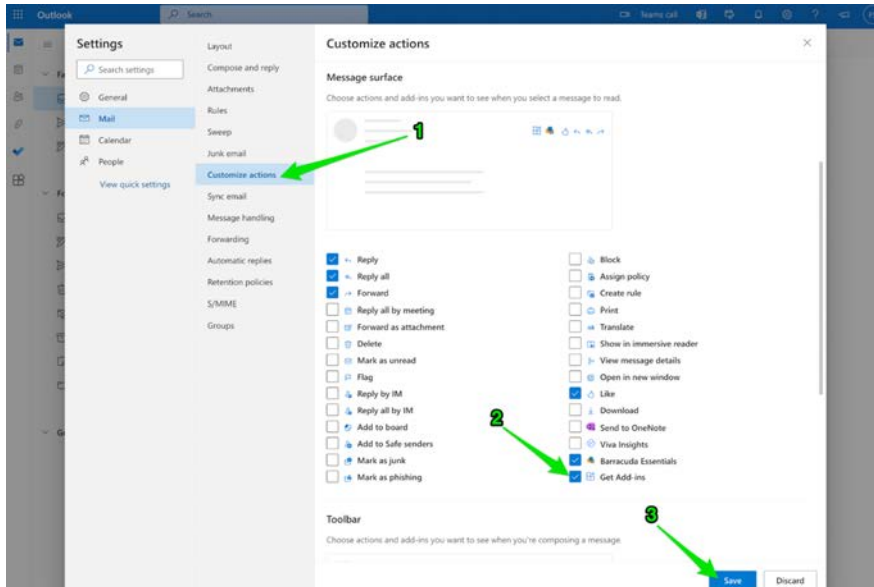
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

## To install the Salesforce extension for Office 365

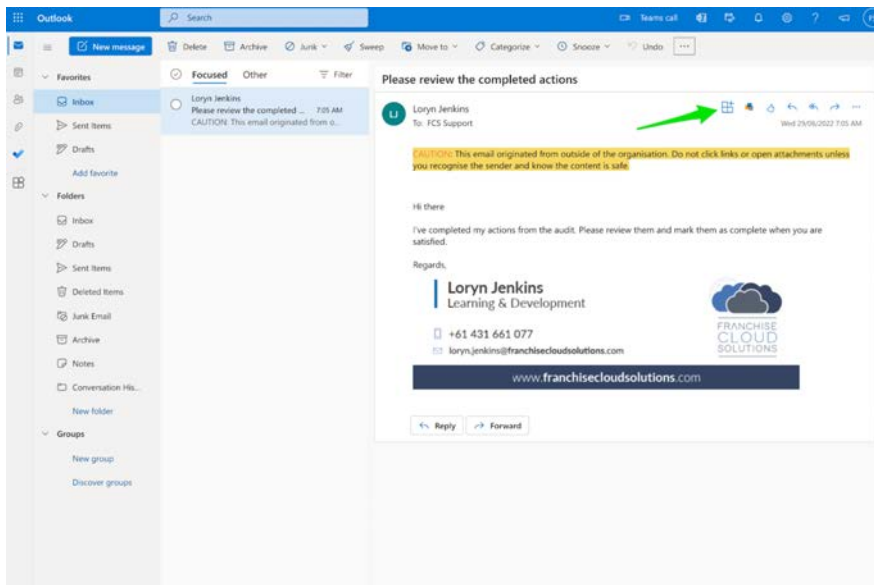
1. From **Outlook 365**, select the **Settings** menu and choose to **View all Outlook Settings**.



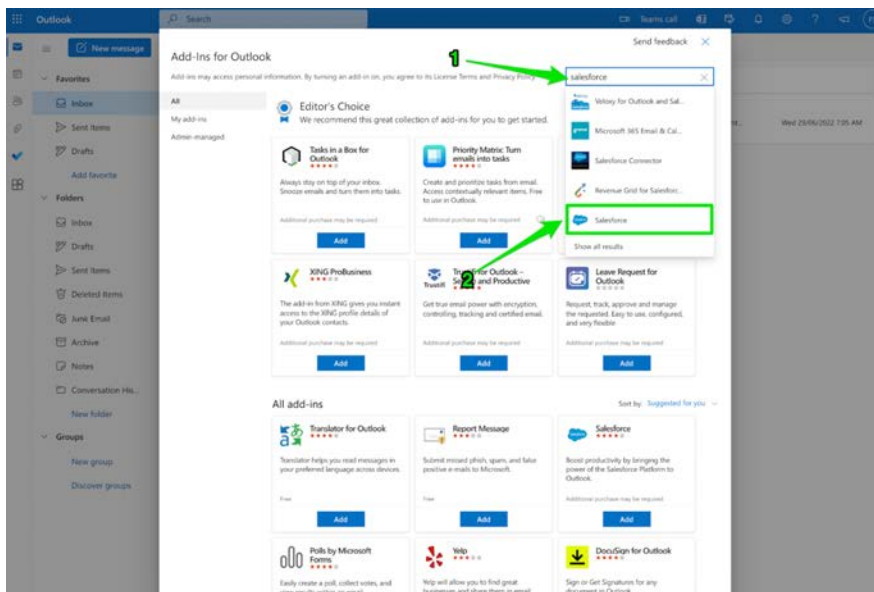
2. Choose **Customize Actions**, scroll to the section named **Message Surface**. Check **Get Add-ins** and press **Save**.



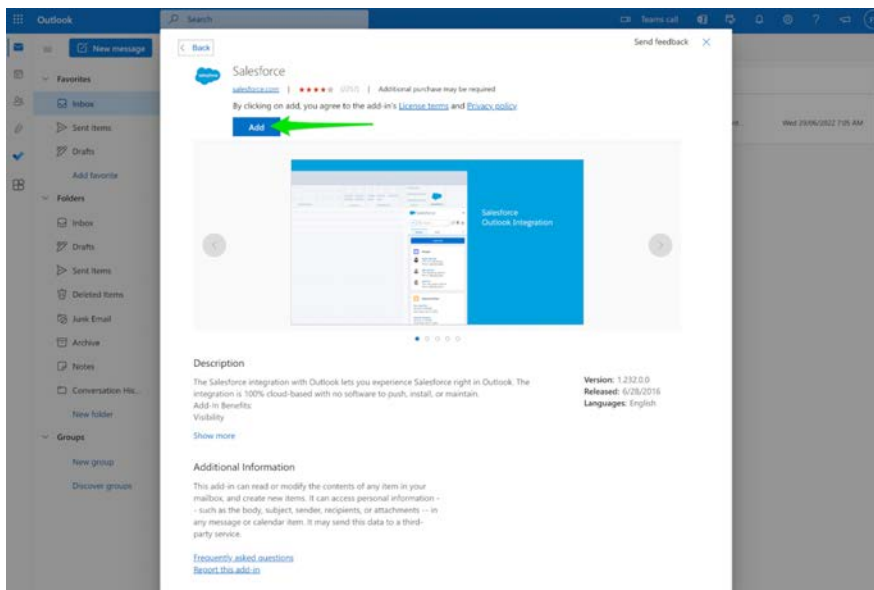
3. Within any message, click the **Get Add-ins** button.



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**.

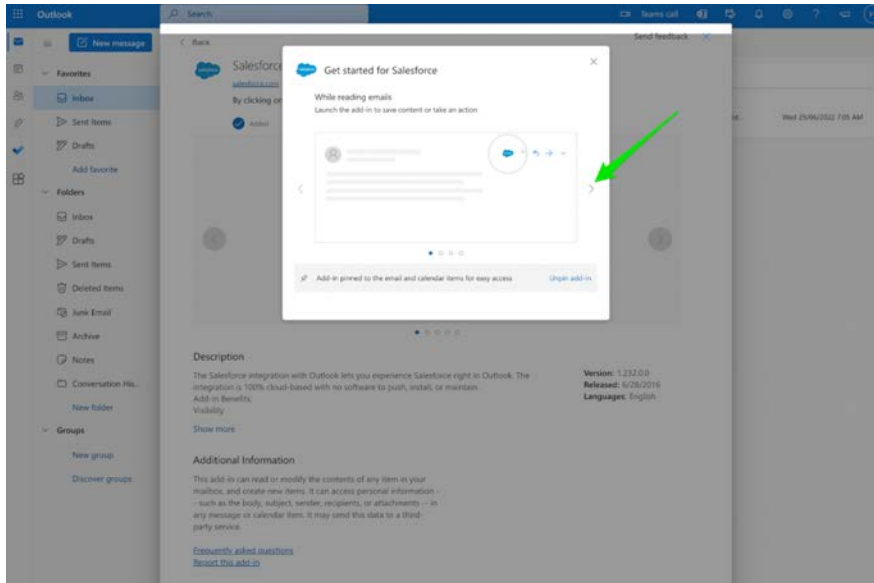


5. From the **Salesforce Connector** page, press the **Add** button.

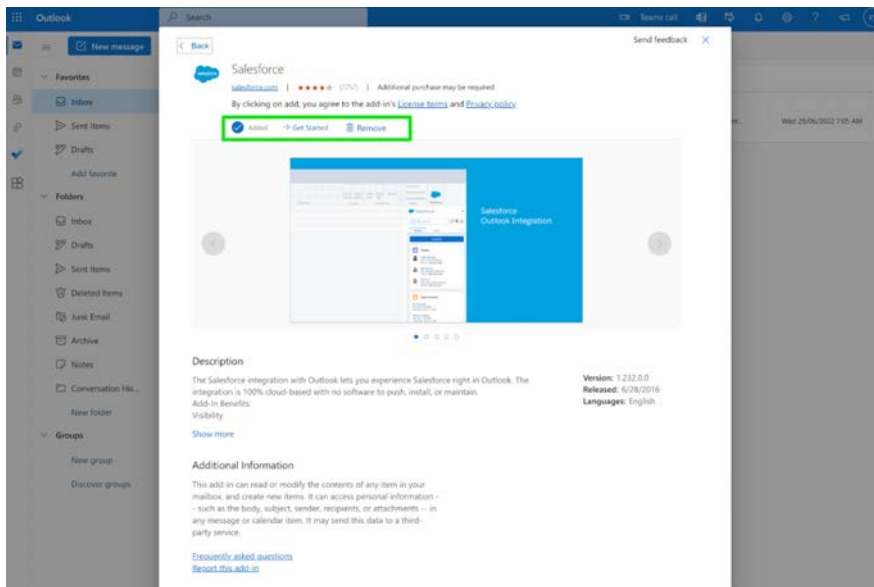




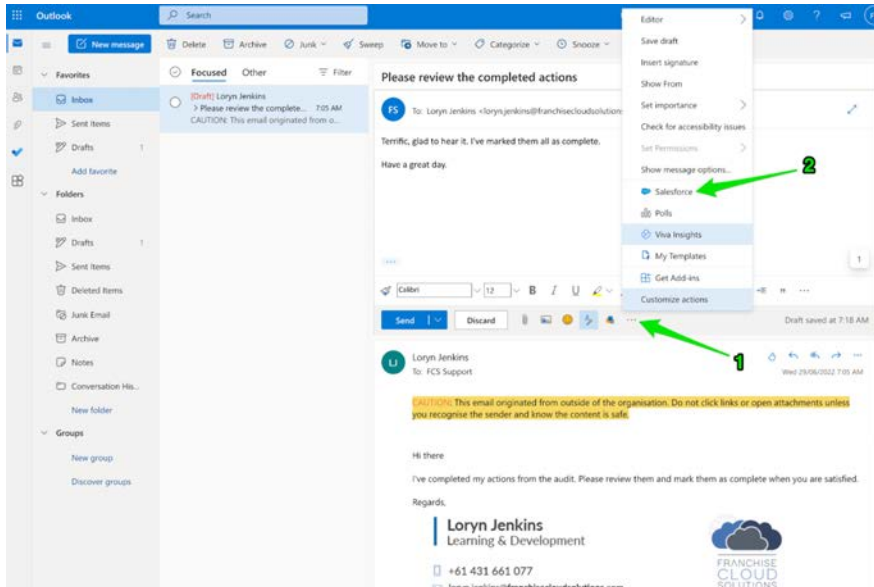
6. We recommend you browse through each of the instructions in the **Get started for Salesforce** box, so you know where to find it and how to use it.



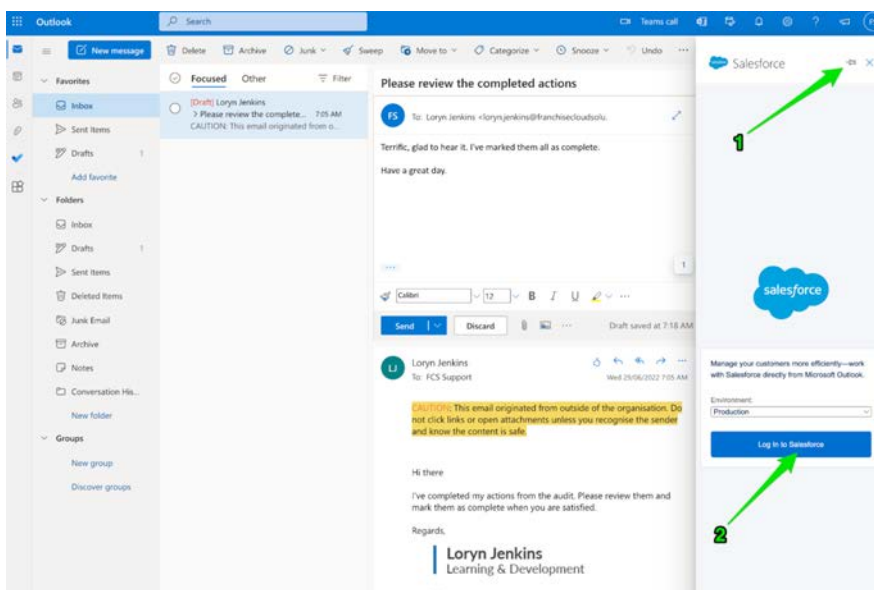
7. Dismiss the **Get started for Salesforce** box and note that the add-in has been added.



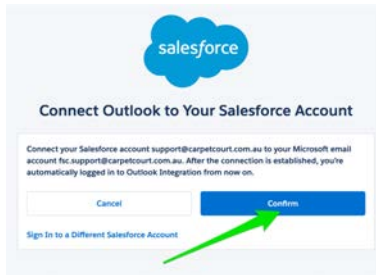
8. Now when you're in any message you're composing, on the **Send** bar, press the ... button to reveal the menu. Select the **Salesforce** add-in.



9. Ensure you **Pin** the Salesforce add-in pane. Then **Log-in** to Salesforce using the Production environment.

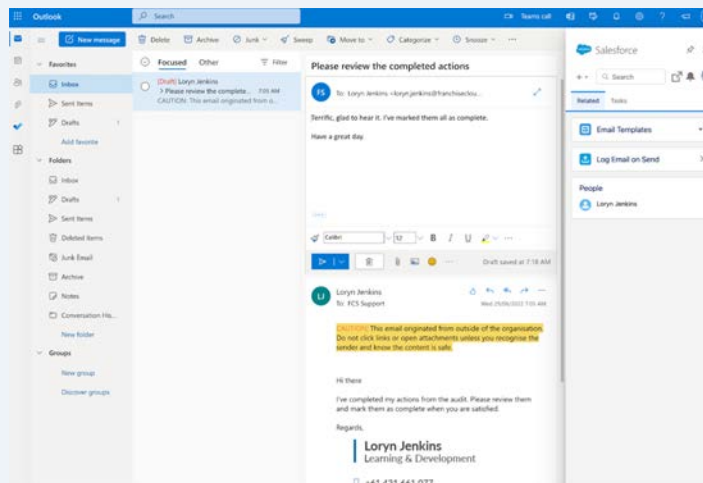


10. At the login prompt, enter your Salesforce **Username** and **Password**. Once logged in, ensure you **Allow** the connection between **Outlook** and your **Salesforce** account.



## 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

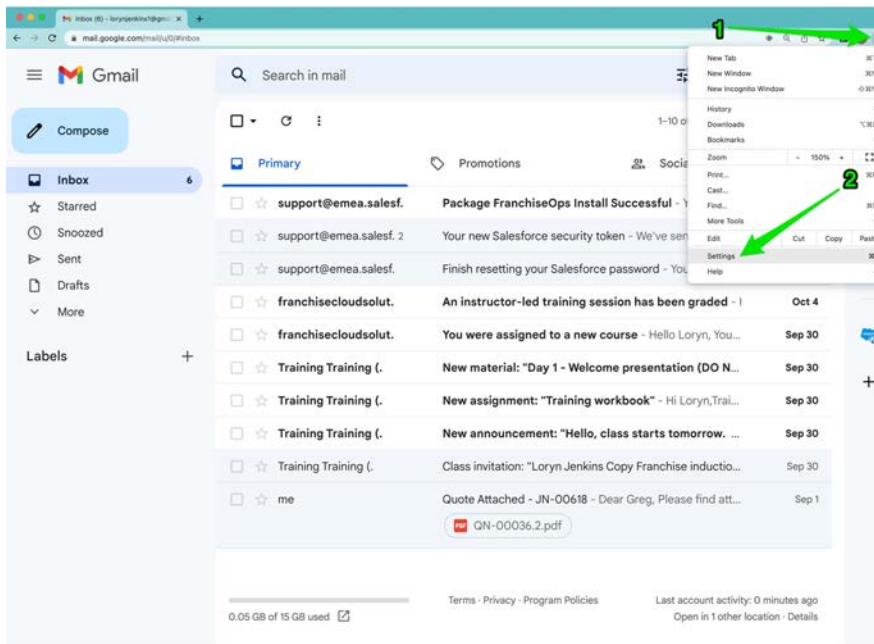
The Salesforce extension for Chrome provides you control as to

- » which emails or events are logged from your email system into Salesforce
- » which Salesforce records the email or event is logged against.

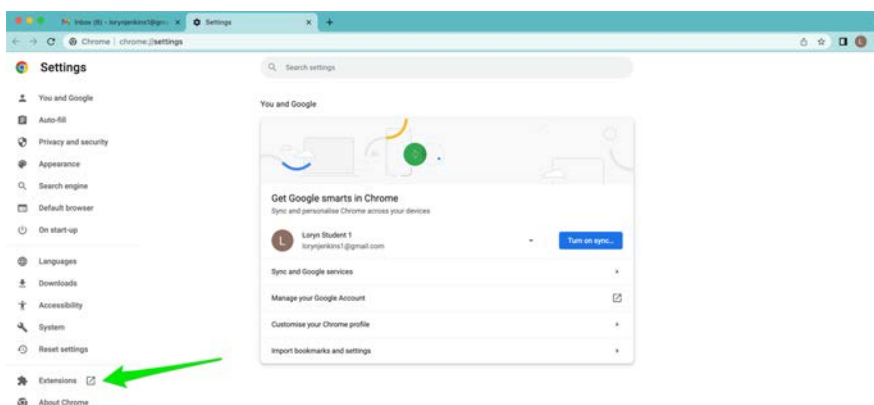
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

## To install the Salesforce extension for GSuite

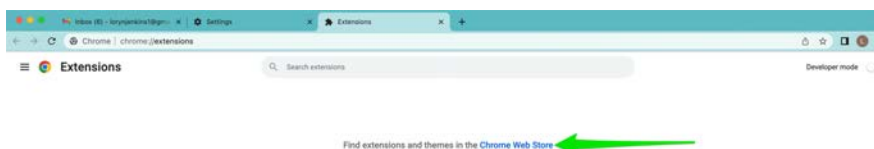
1. Using the **Chrome** browser, open **GMail**. Select the **Customize**  menu, and choose **Settings**.



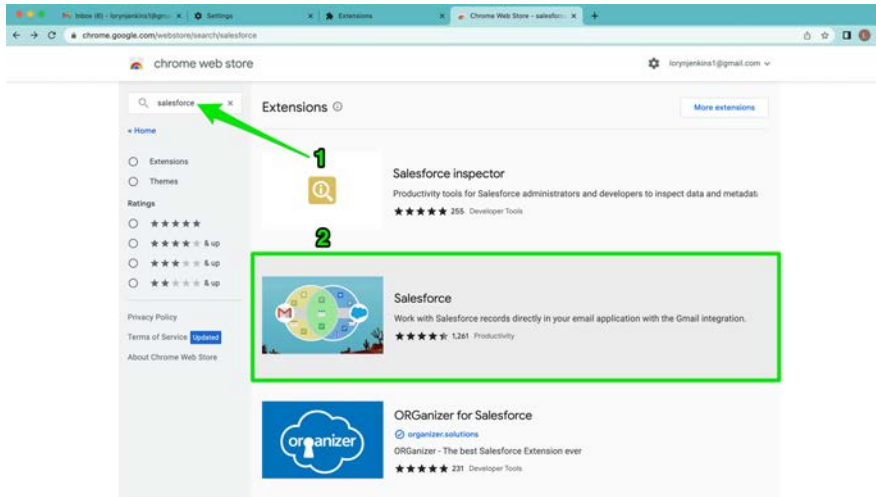
2. Chrome opens a tab in which it displays the **Settings** menu. Select the **Extensions** link.



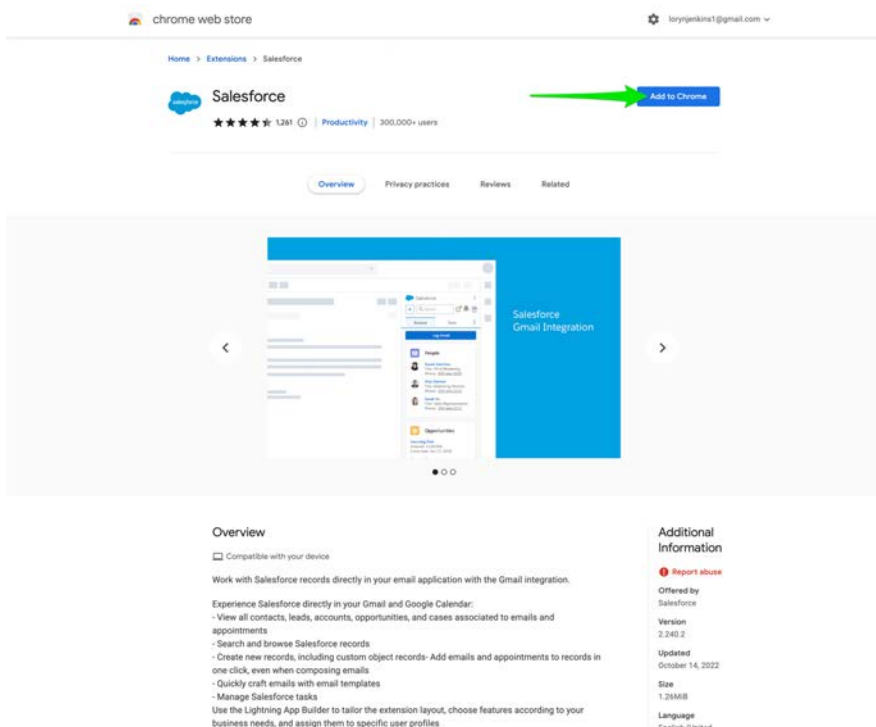
3. **Extensions** opens in yet another tab. Select the link to the **Chrome Web Store**.



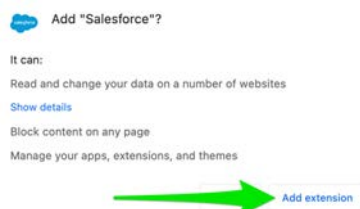
4. A fourth tab opens and displays the **Chrome Web Store**. In the search box, search for *Salesforce*. Select the **Salesforce** extension.



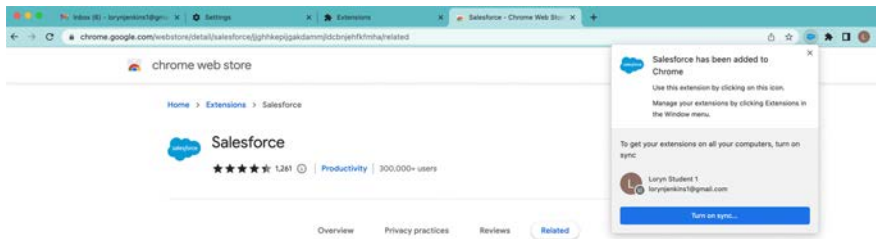
5. From the **Salesforce** entry, select the **Add to Chrome** button.




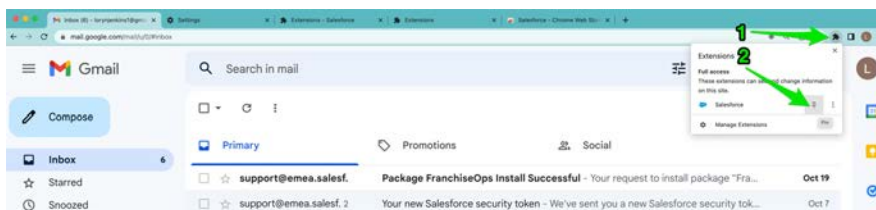
6. From the Add “Salesforce” box, select **Add Extension**.



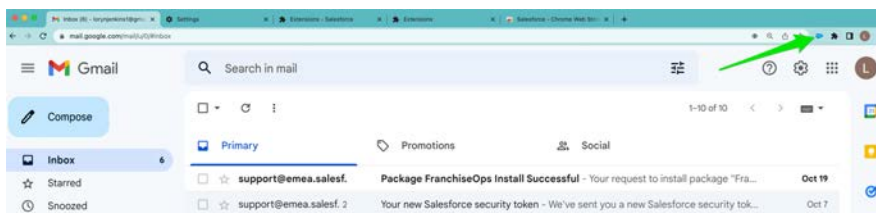
7. Salesforce adds the extension to Chrome then provides a popup to confirm that the extension has been added.



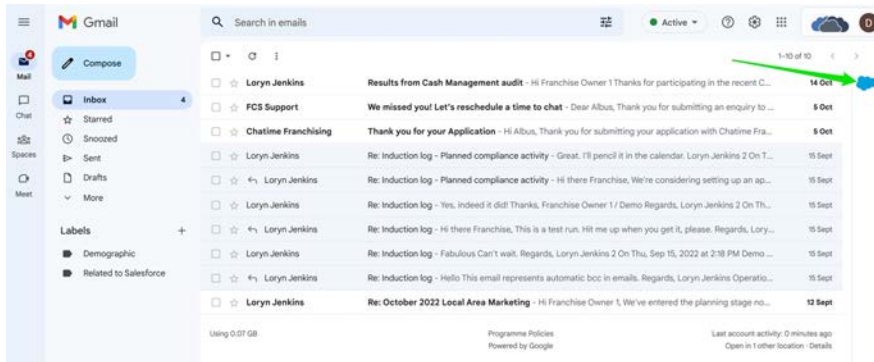
8. Now go back to the tab containing **GMail** and click on the Extensions  button, then click the **Pin** button beside the Salesforce label.



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.

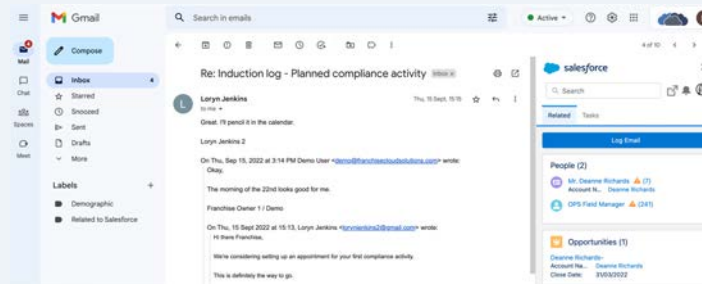


10. The Salesforce extension for Chrome now appears in the sidebar of your web browser. Click on the Salesforce cloud icon to expand the sidebar.



## 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.

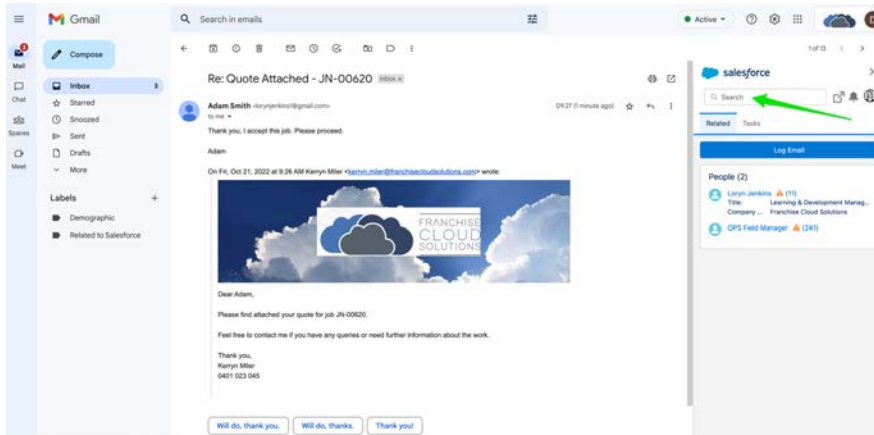


All screen shots below show the Chrome extension. The extension for Office 365 is used similarly.

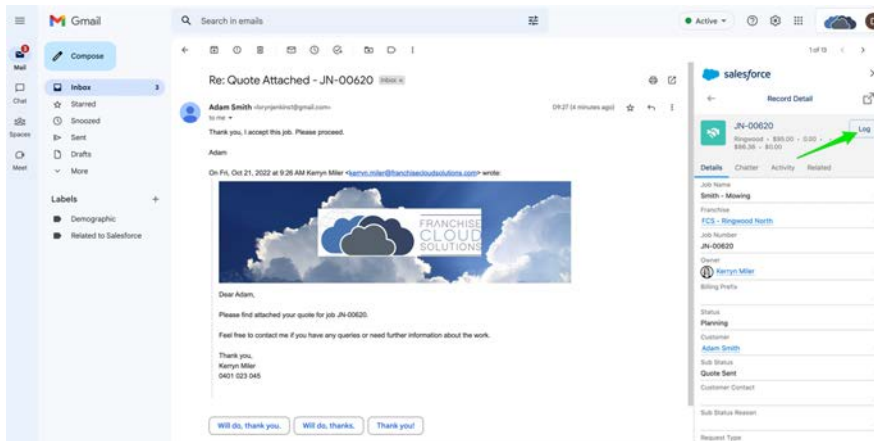


## To log an email against a job (or account)

1. With your email open and the Salesforce pane opened, search for the **Job** record in the search field.

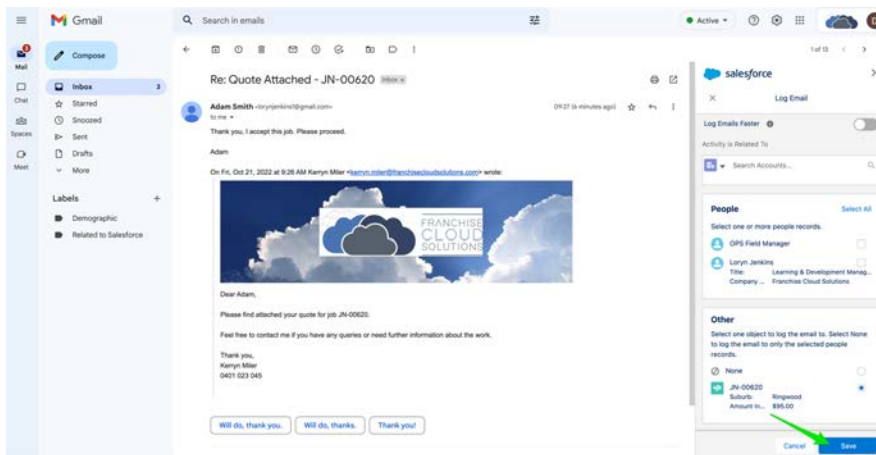


2. The system will display the **Job** record. When you're satisfied it is the right record, press **Log**.



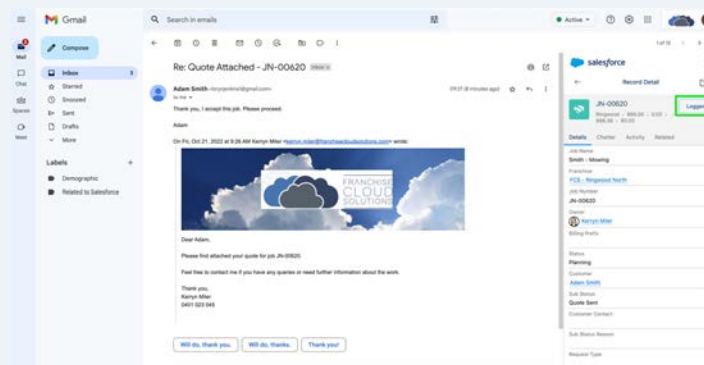


### 3. Press **Save**.



## 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

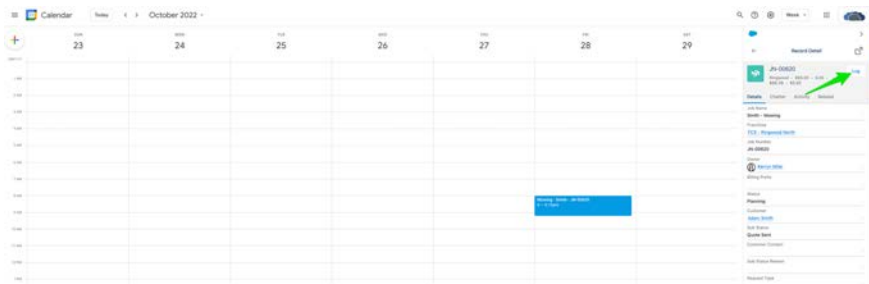
If automatic event syncing is not configured from your personal calendar back to the Salesforce calendar (check with your system administrator) you may still be able to manually log events using the Salesforce extension.

## To log an event to a Salesforce record

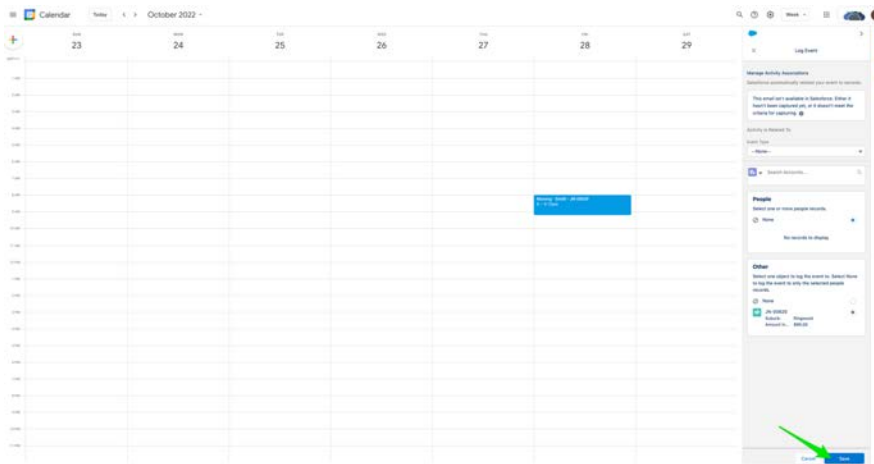
1. In your personal calendar select the event, then search for the appropriate record within the Salesforce search pane.



2. With the correct record in view, press the Log button.

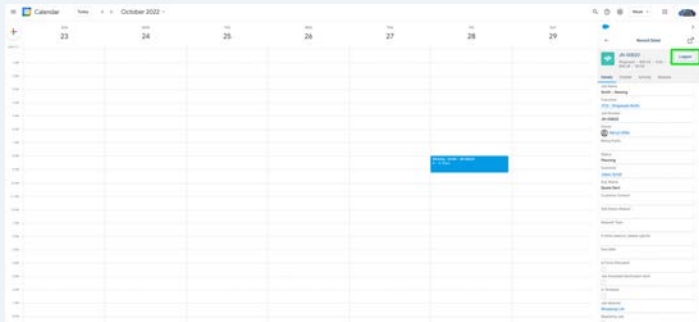


3. Now press **Save**.



## 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's a navigation bar with tabs for Business Management, Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Job Planning (selected), and More. Below this, a header section shows job details: Job Number JN-00166, Job Name, Due Date, Customer Name, Estimated Labour Price \$240.00, Estimated Material Price \$682.50, and buttons for Save, Save and Back, and Cancel.

The main content area is titled 'Roofing' and contains several sections:

- Job Tasks (1)**: A table with columns NAME, DESCRIPTION, and TOTAL. It shows one task: 'Doing th...' with a total of \$240.00.
- Job Materials (2)**: A table with columns DESCR..., QUANTITY, and TOTAL. It shows two materials: 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 \$0.00.
- Roofing**: A section for adding materials. It has a 'Material' dropdown menu with 'Yellow' selected. A green arrow points to this dropdown. Below it, a highlighted item is 'MN-00001 Dulux • 10 • Yellow Paint • 55.00'. To the right, there are input fields for 'Material Description', 'Material Cost' (\$0.00), 'Sub Total' (\$0.00), 'Markup(%)' (0.0), and 'Total' (\$0.00).
- Roofing Summary**: A summary table with columns Amount, Tax, and Include. It shows: Amount \$922.50, Tax 10%, and a total of \$1,014.75. Below this, a 'Cost' of \$675.00, 'Profit' of \$247.50, and 'Total' of \$1,014.75 are listed.
- Labour Summary**: A summary table with columns Cost, Amount, and Profit. It shows: 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.

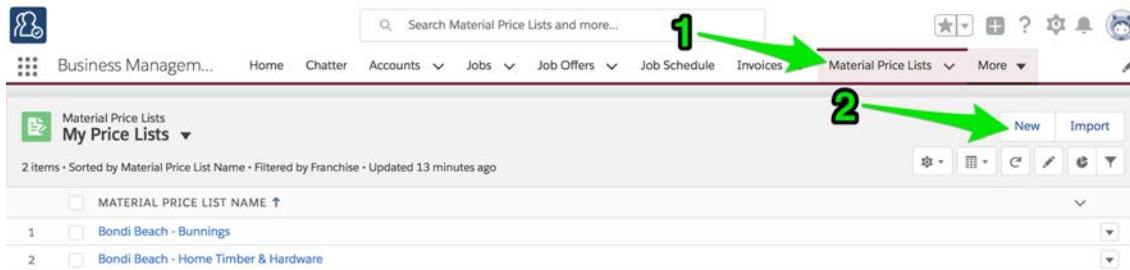
# Creating a material price list

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

\*Franchise

Owner  
Loryn Jenkins

Supplier

System Information

Currency

Cancel

Save & New

Save

The new price list displays.

Business Management...

Home Chatter Accounts Jobs Job Offers Job Schedule Invoices Material Price Lists More

Search Material Price Lists and more...

Star Grid Help Settings Notifications Profile

Material Price List

Bondi Beach - Tradezone

Edit Delete Clone

DETAILS

RELATED

Material Price List Name  
Bondi Beach - Tradezone

Franchise  
FCS Bondi Beach

Created By  
Loryn Jenkins, 23/05/2018 3:02 PM

Owner  
Loryn Jenkins

Supplier  
Tradezone

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' interface for 'Bondi Beach - Tradezone'. The 'RELATED' tab is selected, indicated by a green arrow. The interface includes a search bar at the top, a navigation menu with options like 'Business Management', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', 'Material Price Lists', and 'More'. Below the search bar, there are buttons for 'Edit', 'Delete', and 'Clone'. The main content area displays details for the price list, including the name 'Bondi Beach - Tradezone', the franchise 'FCS Bondi Beach', the owner 'Loryn Jenkins', the supplier 'Tradezone', the creation date '23/05/2018 3:02 PM', and the currency 'Australian Dollar'.

2. From the **Materials** section, press **New**.

The screenshot shows the 'Materials' section of the 'Material Price List' interface. The 'RELATED' tab is selected. Below the tab, there is a section labeled 'Materials (0)'. A green arrow points to a 'New' button located at the bottom right of this section.

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

☐

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 Managem...

Home

Chatter

Accounts

Jobs

Job Offers

Job Schedule

Invoices

Material Price Lists

More

Material Price List

Bondi Beach - Tradezone

Edit

Delete

Clone

DETAILS

RELATED

Materials (1)

New

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 Business Manager interface for material MN-00018. The 'Details' section contains the following fields:

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

The 'Material Price List' field is highlighted with a green box. The 'Created By' field shows John Smith, 19/06/2018 4:57 PM. The 'Last Modified By' field shows John Smith, 20/06/2018 9:53 AM.



# 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
Understanding syncing and sync records .....	cdxxxvii
Sync Statuses .....	cdxxxvii
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.

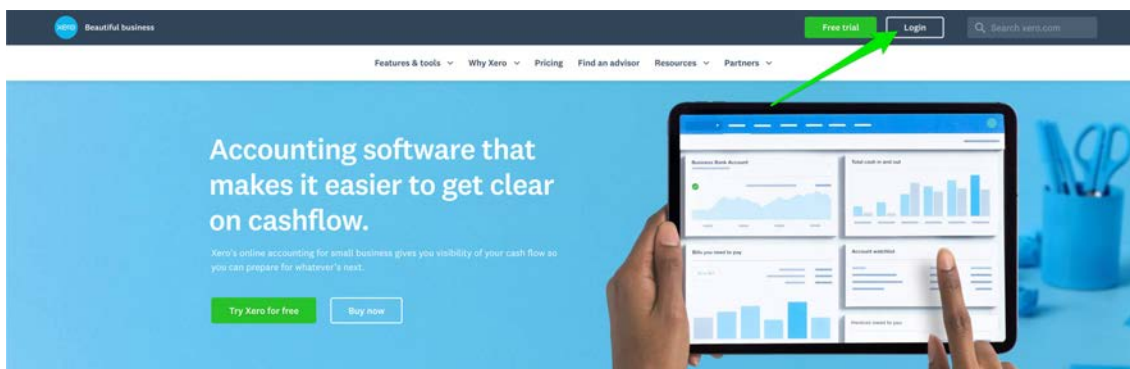
## To connect your Master Franchise Profile Account to Xero

1. In your browser, login to Xero.
2. From Salesforce, connect your Franchise Profile Account to Xero.

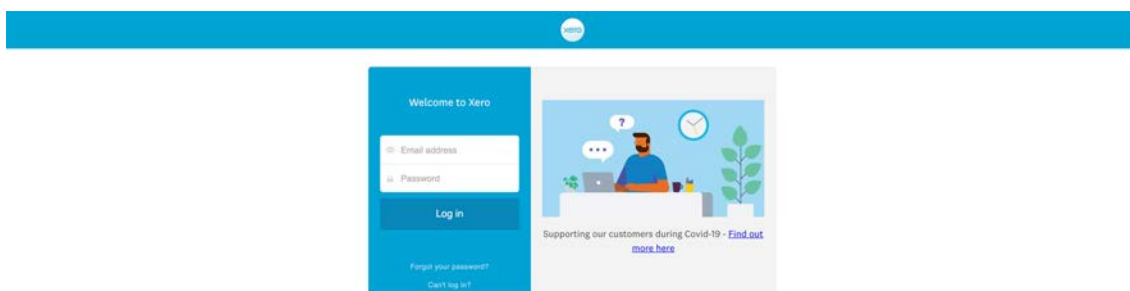
How to do this is described below.

## To login to Xero

1. Go to the Xero website [www.xero.com.au](http://www.xero.com.au) and click the **Login** button.



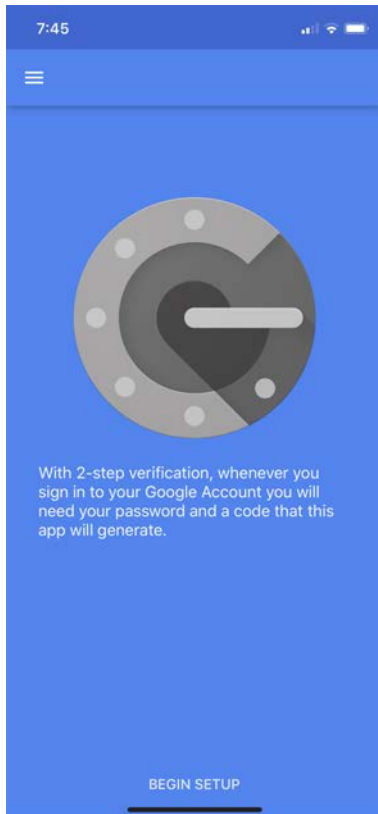
2. Now enter your Email address and Password then press **Log in**.



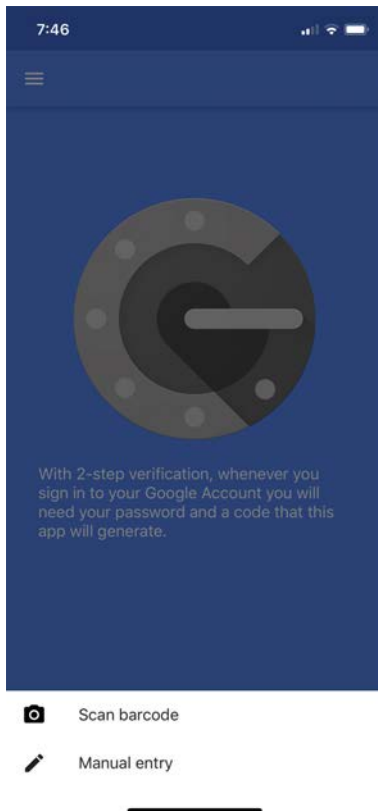
3. Xero may prompt you to set up two-step authentication. Press **Set up two-step authentication** to continue.



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.

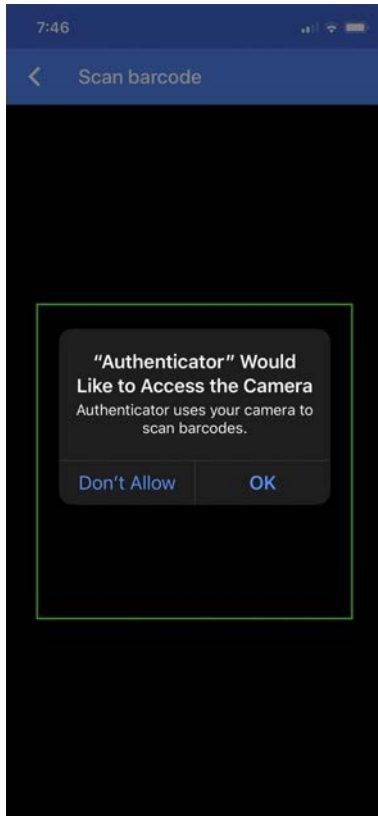


5. If this the first time you've used Google Authenticator, tap **Begin Setup** (otherwise, tap the + button) then tab **Scan barcode**.

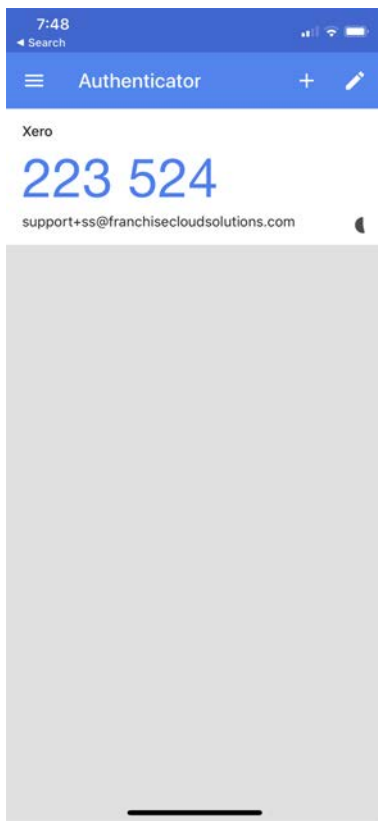




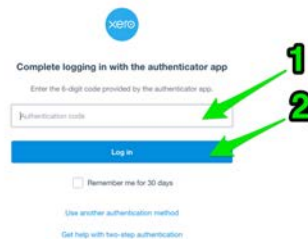
6. If this is the first time you've used Google Authenticator, you may need to grant permission to use your camera. Press **OK**.



7. 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.



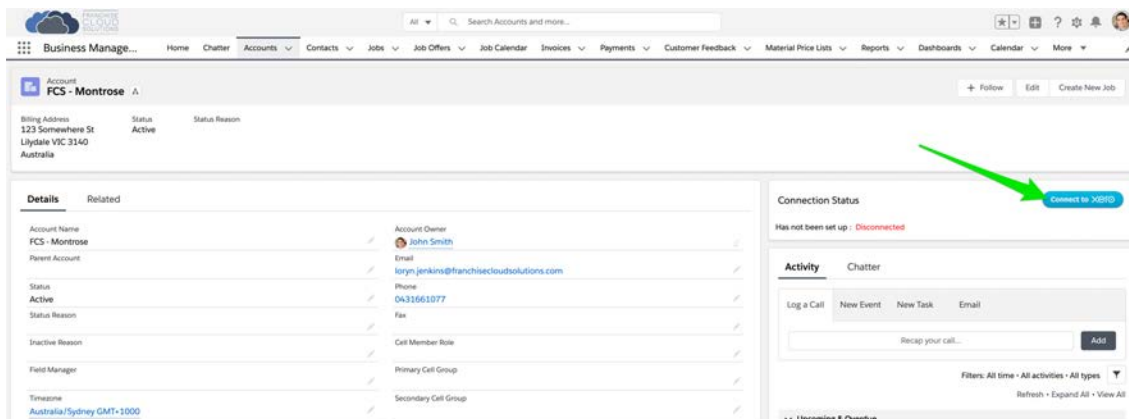
8. Enter the six digit code and press **Log in**.



9. Having logged into your Xero account, you're now ready to connect your Franchise Profile Account to Xero.

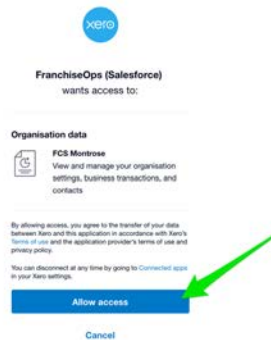
## To connect to Xero

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	Selected Currencies Australian Dollar

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

Account: FCS - Montrose

123 Somewhere St  
Ulydale VIC 3140  
Australia

Status: Active

Details

Account Name	FCS - Montrose	Account Owner	John Smith
Parent Account		Email	loryn.jenkins@franchisecloudsolutions.com
Status	Active	Phone	0431661077
Status Reason		Fax	
Inactive Reason		Cell Member Role	
Field Manager		Primary Cell Group	

Connection Status - OAuth 2.0

FCS Montrose : Connected

View Mapping Disconnect

Activity

Log a Call New Event New Task Email

Recap your call...

Filters: All time - All activities - All types



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



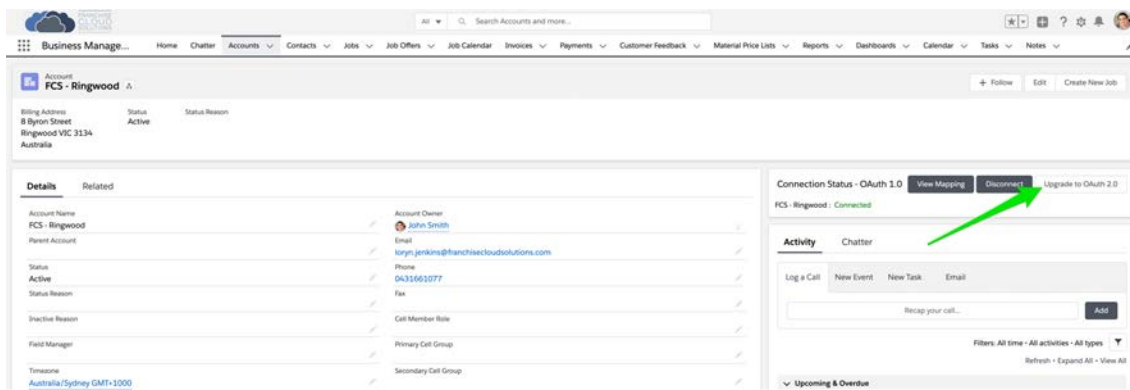
OAuth 2.0 is a new and improved way to connect to Xero.

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.

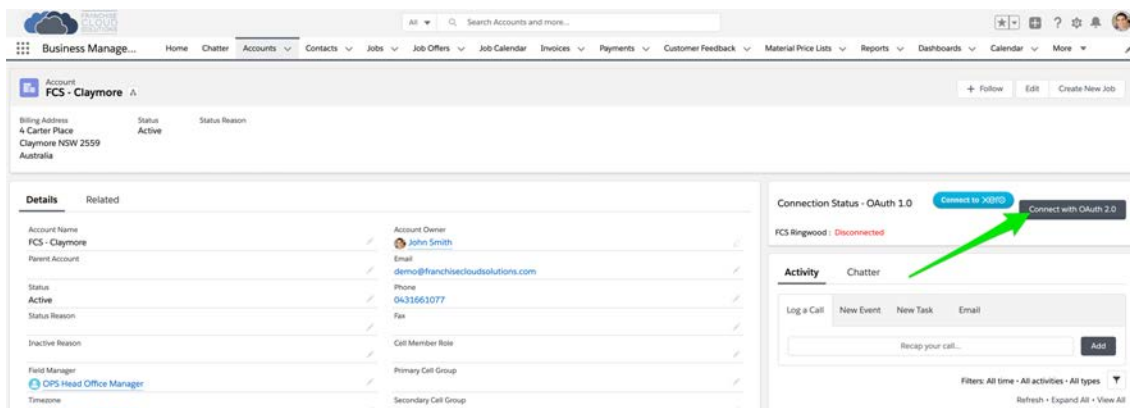
For those who have never connected to Xero, See “How to connect to Xero” on page cdxxvi.

## 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.



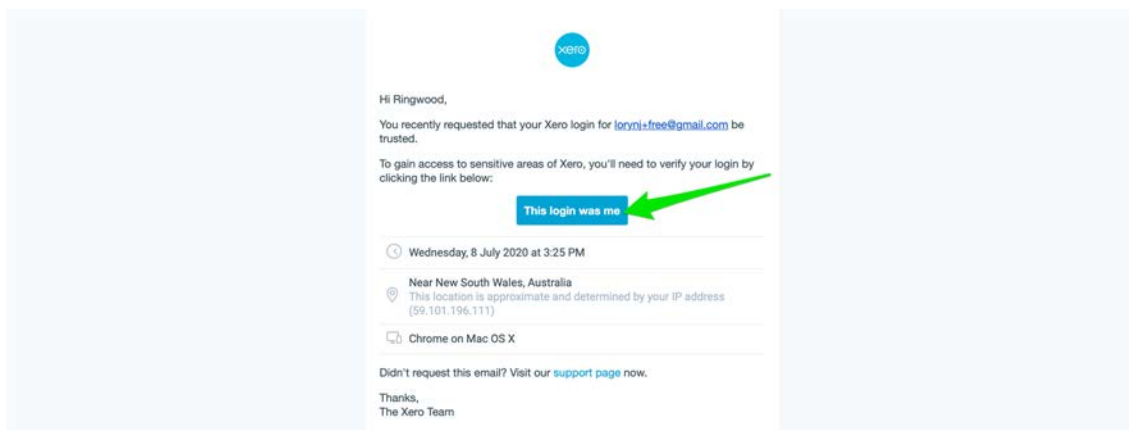
3. Now you are shown a login prompt. Enter your username and password (or accept the suggested username and password), then press **Log in**.



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.



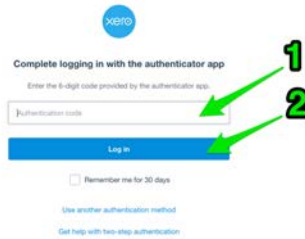
5. Open the email Xero send you and press the **This login was me** button.



6. Now go back to your browser and press the **Continue granting access** button.

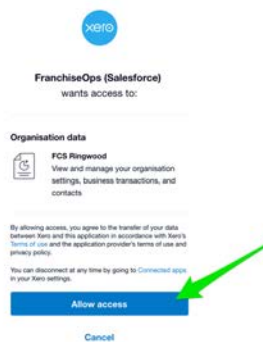


7. If you have previously set up a two-step login, open Google Authenticator on your phone and enter the six digit code, then press **Log in**.

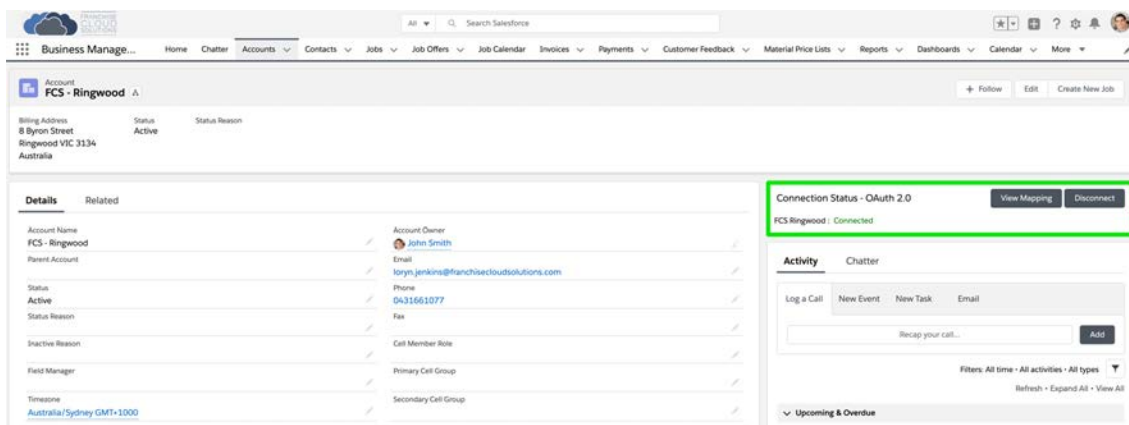


If you have never set up a two step login, you will need to set one up now. See “To login to Xero” on page cdxxxvi.

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 displays the Salesforce Business Manager interface for a specific Sync record, S011895. The record is categorized as 'Automated'. The 'Parent Sync' field is empty, which is highlighted with a green rectangular box. Other fields include 'Sync Name' (S011895), 'Request Sent Time', 'Response Received Time', 'Error Message', '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), 'Created By' (Integration User), 'Owner' (Integration User), 'Currency' (Australian Dollar), and 'Last Modified By' (Integration User). The 'ACTIVITY' section on the right shows filters for 'All time', 'All activities', and 'All types', with options to 'Refresh' and 'Expand All'. It also includes sections for 'Next Steps' and 'Past Activities', both indicating no activity is present.

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 displays the Salesforce Business Manager interface for a specific Sync record, S011914. The record is categorized as 'Manual'. The 'Parent Sync' field is empty, which is highlighted with a green rectangular box. Other fields include 'Sync Name' (S011914), 'Request Sent Time', 'Response Received Time', 'Error Message', '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), 'Created By' (Loryn Jenkins, 16/08/2018 2:01 PM), 'Owner' (Loryn Jenkins), 'Currency' (Australian Dollar), and 'Last Modified By' (Loryn Jenkins, 16/08/2018 2:01 PM). The 'ACTIVITY' section on the right shows filters for 'All time', 'All activities', and 'All types', with options to 'Refresh' and 'Expand All'. It also includes sections for 'Next Steps' and 'Past Activities', both indicating no activity is present.

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 displays the Salesforce Business Management interface for a Sync record. The top navigation bar includes a search bar and various utility icons. The main header shows the record type 'Sync' and the ID 'S011900', with buttons for 'Edit', 'Delete', and 'Change Owner'. The interface is divided into three main sections: 'RELATED', 'DETAILS', and 'ACTIVITY'.

**RELATED**

- Sync Name: S011900
- Request Sent Time
- Response Received Time
- Error Message
- Parent Sync: S011895 (highlighted with a green box)
- Type
- Created By: Integration User, 16/08/2018 1:33 PM
- Currency: Australian Dollar

**DETAILS**

- Franchise: FCS Ringwood
- Invoice
- Sync Status: Succeeded
- Number Of Records
- From Date
- To Date
- Owner: Integration User
- Last Modified By: Integration User, 16/08/2018 1:33 PM

**ACTIVITY**

Filters: All time • All activities • All types

Refresh Expand All

**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.

Load More Past Activities

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.

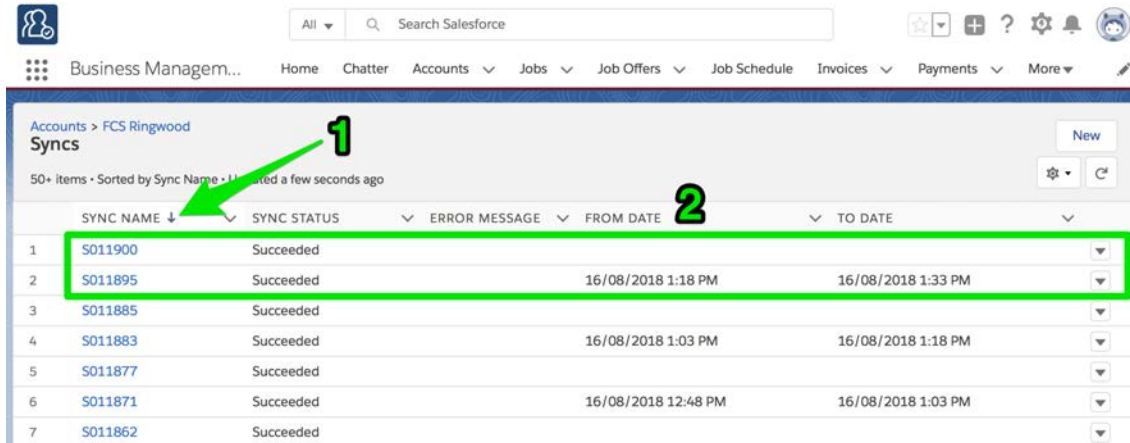
The screenshot shows the Salesforce interface for the 'FCS Ringwood' account. The 'Accounts' tab is selected in the top navigation bar. The 'Related' tab is highlighted with a green arrow. The 'Details' section on the left shows account information such as 'Account Name', 'Master Franchise', 'Status', and 'Inactive Reason'. The 'Related' section on the right shows 'Account Owner' information, including 'Email', 'Phone', and 'Fax'. The 'Connection Status' section on the far right shows 'FCS Ringwood : Connected'.

2. Scroll down to the **Syncs** section, then press **View All**.

The screenshot shows the Salesforce interface for the 'FCS Ringwood' account. The 'Accounts' tab is selected in the top navigation bar. The 'Syncs' section is visible, showing a list of syncs with columns for 'SYNC NAME', 'SYNC STATUS', 'ERROR MESSAGE', and 'FROM DATE'. The 'View All' link is highlighted with a green arrow.

SYNC NAME	SYNC STATUS	ERROR MESSAGE	FROM DATE
<a href="#">S011052</a>	Succeeded		
<a href="#">S011053</a>	Succeeded		
<a href="#">S011062</a>	Succeeded		15/08/2018 5:33 PM
<a href="#">S011065</a>	Succeeded		
<a href="#">S011072</a>	Succeeded		15/08/2018 5:48 PM
<a href="#">S011075</a>	Succeeded		

3. Click on the Sync Name column to order newest to oldest.



Accounts > FCS Ringwood  
Syncs

50+ items • Sorted by Sync Name • Updated a few seconds ago

	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 shows the Salesforce interface for an invoice record. The top navigation bar includes 'Business Manager' and tabs for Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, and More. The invoice details are displayed in a table with columns for Account, Invoice Date, Amount Inc Tax, and Status. The 'Details' tab is active, showing fields like Sync Status, Invoice Number, Invoice Date, Due Date, Type, Status, Account, and Reference. The 'Activity' tab is also visible, showing a list of activities and a 'Next Steps' section.

Account	Invoice Date	Amount Inc Tax	Status
Mark Williams	21/08/2018	AUD 192.50	Open

**Details** | Related

Field	Value
Sync Status	
Invoice Number	INV-00007
Invoice Date	21/08/2018
Due Date	21/08/2018
Type	Full
Status	Open
Account	Mark Williams
Reference	

**Activity** | Chatter

**Email**

Create new... **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.

2. Now make a change to it.

The screenshot shows the Salesforce Business Management interface for an invoice (INV-00007). The 'DETAILS' tab is active, and the 'Invoice Date' field is highlighted with a green box. The 'RELATED' tab shows the 'Owner' field with a link to 'Ringwood Franchisee'. The 'ACTIVITY' tab is also visible on the right.

Field	Value
Account	Mark Williams
Invoice Date	22/08/2018
Amount Inc Tax	AUD 192.50
Status	Open

**DETAILS**

Sync Status:

Invoice Number: INV-00007

Invoice Date: 22/08/2018

Due Date: 22/08/2018

Type: Full

Status: Open

Account: Mark Williams

Reference:

**RELATED**

Owner: Ringwood Franchisee

Amount: AUD 175.00

Tax Amount: AUD 17.50

Amount Inc Tax: AUD 192.50

Tax Exempt: ☐

Job: JN-00061

Has been emailed?: ☐

**ACTIVITY**

Chatter

Email:

Create new... Add

Filters: All time • All activities • All types

Refresh Expand All

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

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 (INV-00007). A green arrow points to the 'Send to Financial System' button in the top right corner of the invoice details section.

Field	Value
Account	Mark Williams
Invoice Date	22/08/2018
Amount Inc Tax	AUD 192.50
Status	Open

**Details**

Sync Status:

Invoice Number: INV-00007

Invoice Date: 22/08/2018

Due Date: 22/08/2018

Type: Full

Status: Open

Account: Mark Williams

Reference:

**Related**

Owner: Ringwood Franchisee

Amount: AUD 175.00

Tax Amount: AUD 17.50

Amount Inc Tax: AUD 192.50

Tax Exempt: ☐

Job: JN-00061

Has been emailed?: ☐

**Activity**

Chatter

Email:

Create new... Add

Filters: All time • All activities • All types

Refresh Expand All

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.

The **Send to Financial System** dialog box appears.



#### 4. Press **Finish**.

Send To Financial System

Succeeded

Finish

The **Invoice** has now been updated in the financial system.

The screenshot shows the Salesforce Business Manager interface. At the top, there's a navigation bar with 'Business Manage...' and various tabs like Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, and More. Below this, the 'Invoices' tab is active, displaying a list of invoices. The selected invoice is 'INV-00007' with a status of 'Open'. The details section shows the following information:

Details	Related
Sync Status	Owner
Invoice Number	Ringwood Franchisee
INV-00007	Amount
22/08/2018	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	

On the right side, there's an 'Activity' section with a 'Chatter' tab. It shows a 'Next Steps' section with a 'More Steps' button and a 'Past Activities' section. The 'Next Steps' section contains the text: 'No next steps. To get things moving, add a task or set up a meeting.' The 'Past Activities' section contains the text: '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 Management interface for an invoice. The top navigation bar includes 'Business Manage...', 'Home', 'Chatter', 'Accounts', 'Jobs', 'Job Offers', 'Job Schedule', 'Invoices', and 'Job Planning'. The main header for the invoice 'INV-00009' includes buttons for '+ Follow', 'Edit', 'Clone', 'Delete', 'Send To Financial System', and 'Pull From Financial System'. Below this, a summary row shows: Account: Mark Williams, Invoice Date: 4/01/2019, Amount Inc Tax: AUD 1,680.00, and Status: Open.

The 'Details' tab is active, displaying a table of fields:

Field	Value
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 1,527.27
Tax Amount	AUD 152.73
Amount Inc Tax	AUD 1,680.00
Tax Exempt	<input type="checkbox"/>
Job	JN-00095
Has been emailed?	<input type="checkbox"/>

The 'Activity' tab is also visible, showing 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.

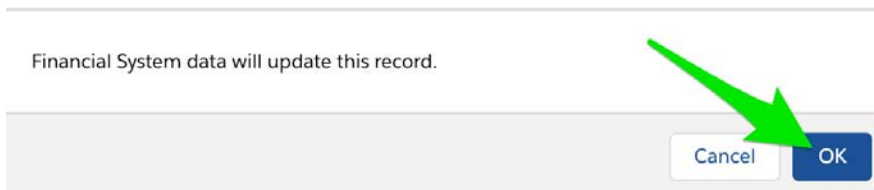
2. Press Pull from Financial System.

This screenshot is identical to the previous one, but with a green arrow pointing to the 'Pull From Financial System' button in the top navigation bar of the invoice details page.

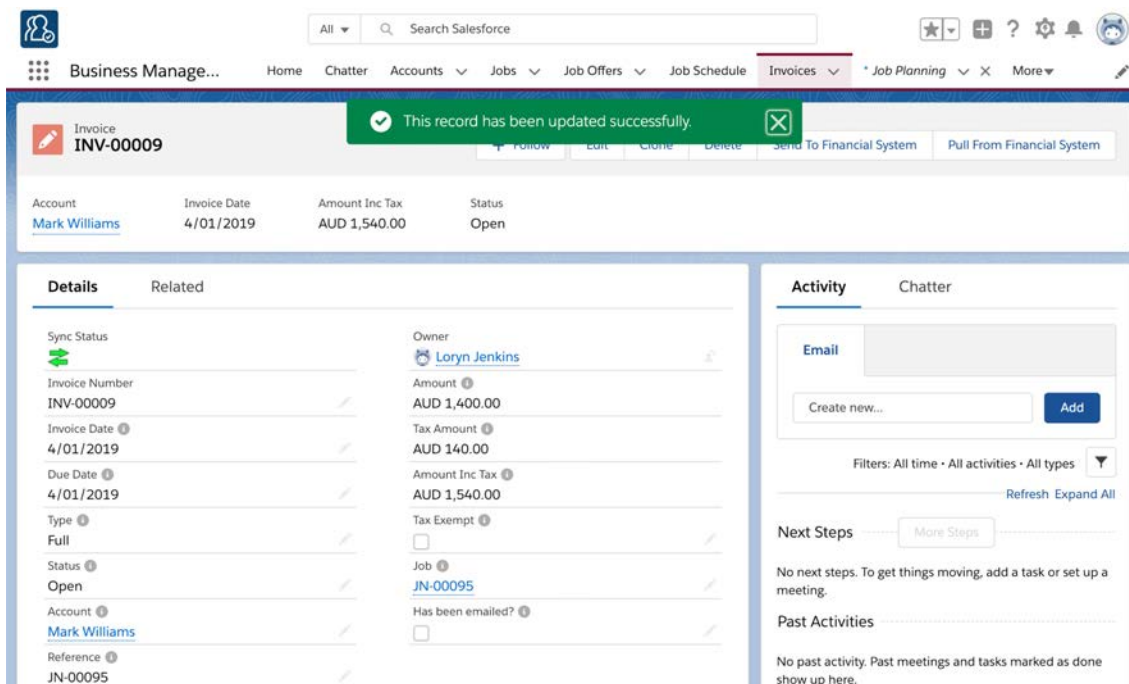
The Pulling this record dialog box appears.

3. Press **OK**.

Pulling this record



4. The system retrieves and updates the invoice record.

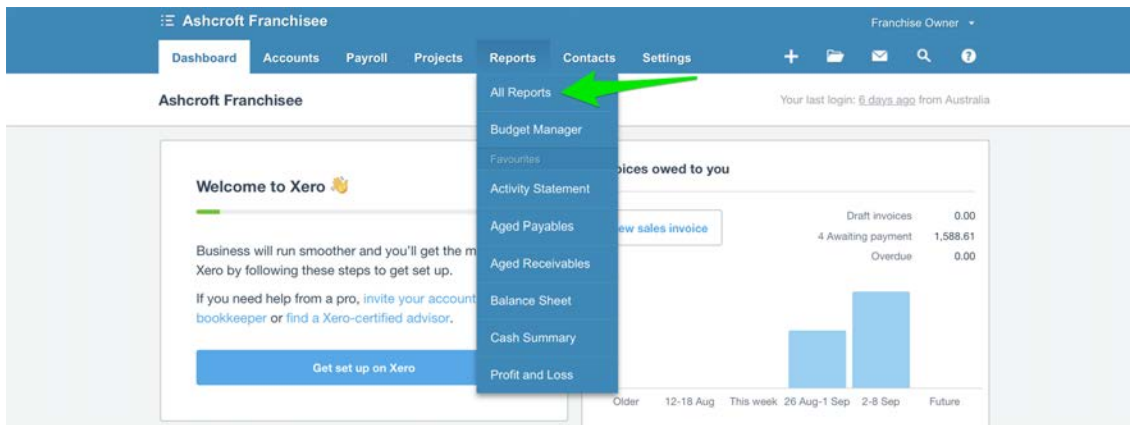


# How to perform end of month reconciliation

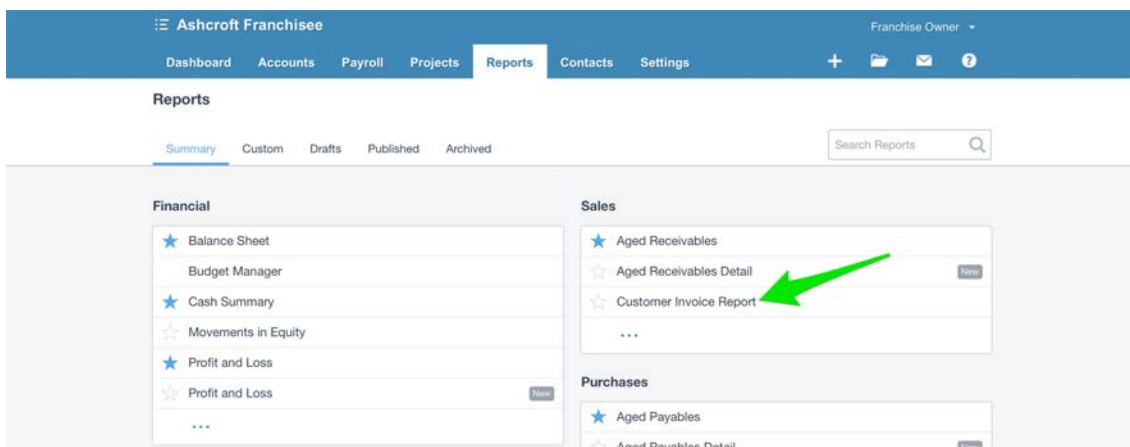
Performing an end of month reconciliation involves comparing the invoice report provided by Xero with the invoice report for Franchise Owners available within Business Management.

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**.



4. Modify the parameters to suit and press the **Update** button. The report appears on-screen and can be exported.

**Ashcroft Franchisee** Franchise Owner

Dashboard Accounts Payroll Projects **Reports** Contacts Settings

Reports

### Customer Invoice Report (Australian Dollar)

Wide view

Dates: Invoice Date From: 1 Aug 2018 To: 31 Aug 2018 Status: Show All Currency: AUD Australian Dollar

Sort By: Invoice Number

☐ Unsent Only  
☐ Include Deleted & Voided

**Update**

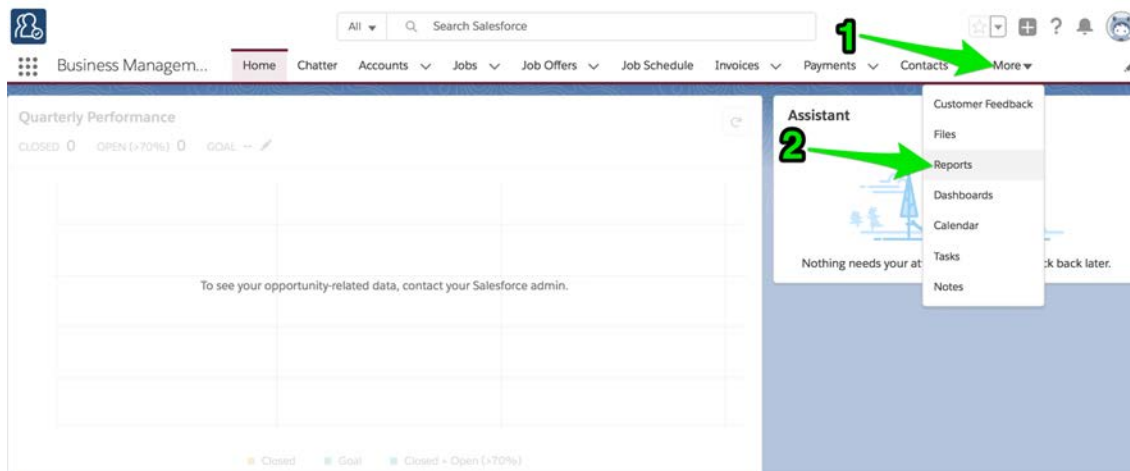
**Customer Invoice Report (Australian Dollar)**  
Ashcroft Franchisee  
From 01 August 2018 to 31 August 2018

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
<b>Page Total</b>								<b>2,083.61</b>	<b>495.00</b>	<b>1,588.61</b>		
<b>Report Total</b>								<b>2,083.61</b>	<b>495.00</b>	<b>1,588.61</b>		

Page 1 of 1 (4 total items) Showing 100 items per page

To obtain the Business Management end of month report

1. From the **Salesforce** menu, select **Reports**.



2. From the **Reports** page, go to **All Folders** and select **Franchise Owner Reports** folder.

The screenshot shows the Salesforce Reports interface. On the left sidebar, under the 'FOLDERS' section, 'All Folders' is highlighted with a green arrow labeled '1'. In the main content area, the 'Franchise Owner Reports' folder is selected, indicated by a green arrow labeled '2'. The table below shows the contents of this folder.

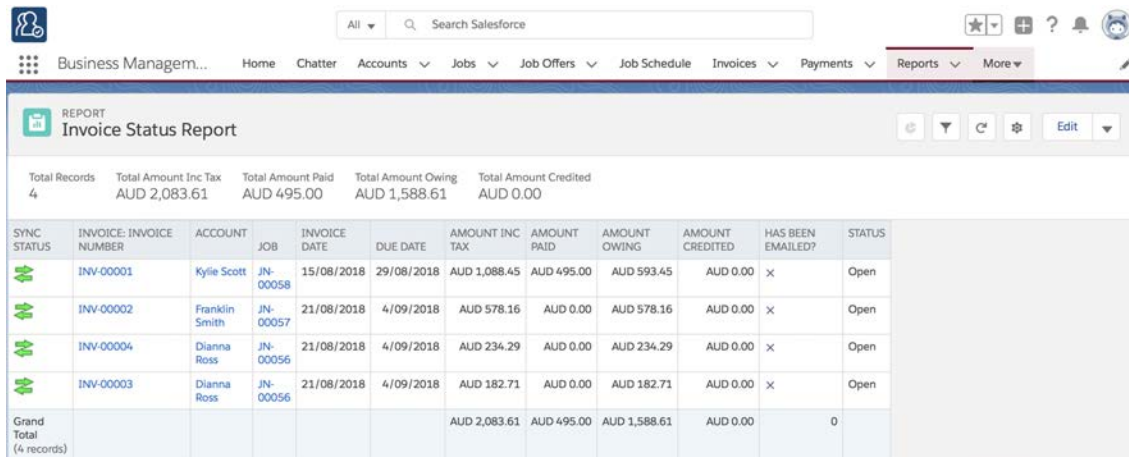
REPORTS	NAME	CREATED BY	CREATED ON	LAST MODIFIED BY	LAST MODIFIED DATE
Recent	Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	Integration User	14/03/2018, 9:45 am

3. Now select the **Invoice Status Report**.

The screenshot shows the Salesforce Reports interface with the 'Franchise Owner Reports' folder selected. The 'Invoice Status Report' is highlighted with a green arrow. The table below lists the reports in this folder.

REPORTS	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	Job Status ALL OPEN		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Private Reports	Job Source v Profit		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Public Reports	Job Status Last 90 Days		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
All Reports	Open Invoices by Age		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
FOLDERS	Open Invoices by Custa...		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
All Folders	Planned v Actual COGS		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Created by Me	Planned v Actual Hours		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
Shared with Me	Quote Conversion - Last ...		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
FAVORITES	Quote Conversion by Job...		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
All Favorites	Quote Conversion by Job...		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Client Growth by Type		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Actual Hours v Target		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Gross Profit Monthly		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	

4. The data for the current month appears. You can export as needed.



The screenshot shows the Salesforce Business Manager interface. At the top, there's a navigation bar with 'Business Manager...' and various tabs like Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, Reports, and More. A search bar is also present. Below the navigation bar, the 'REPORT' section is titled 'Invoice Status Report'. It includes summary statistics: Total Records (4), Total Amount Inc Tax (AUD 2,083.61), Total Amount Paid (AUD 495.00), Total Amount Owing (AUD 1,588.61), and Total Amount Credited (AUD 0.00). The main table lists individual invoices with columns for SYNC STATUS, INVOICE: INVOICE NUMBER, ACCOUNT, JOB, INVOICE DATE, DUE DATE, AMOUNT INC TAX, AMOUNT PAID, AMOUNT OWING, AMOUNT CREDITED, HAS BEEN EMAILED?, and STATUS. The table contains 4 records, all with 'Open' status. A 'Grand Total' row at the bottom shows the aggregated values.

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.



# 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 'Genevieve McMullan' account page in a system. The 'Marketing Information' section is expanded, showing fields for 'Preferred Communication Channel', 'Unsubscribe', 'Survey Opt Out', 'SMS Unsubscribe', 'Last Job Date', 'Days Since Last Job Offer', 'Last Survey Sent', and 'Days Since Last Survey'. The 'Unsubscribe' checkbox is currently unchecked.

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 small pencil) located at the end of the 'Unsubscribe' field.

4. Check Survey Opt Out, then press **Save**.

The screenshot displays the 'Genevieve McMullan' account page in the Business Management system. The 'Survey Opt Out' checkbox is checked, highlighted with a yellow background, and a green arrow labeled '1' points to it. The 'System Information' section shows the account was created by Simon Walker on 19/04/2018 at 10:06 AM, with the currency set to Australian Dollar. A green arrow labeled '2' points to the 'Save' button at the bottom right of the form. The 'Cancel' button is also visible next to it.

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

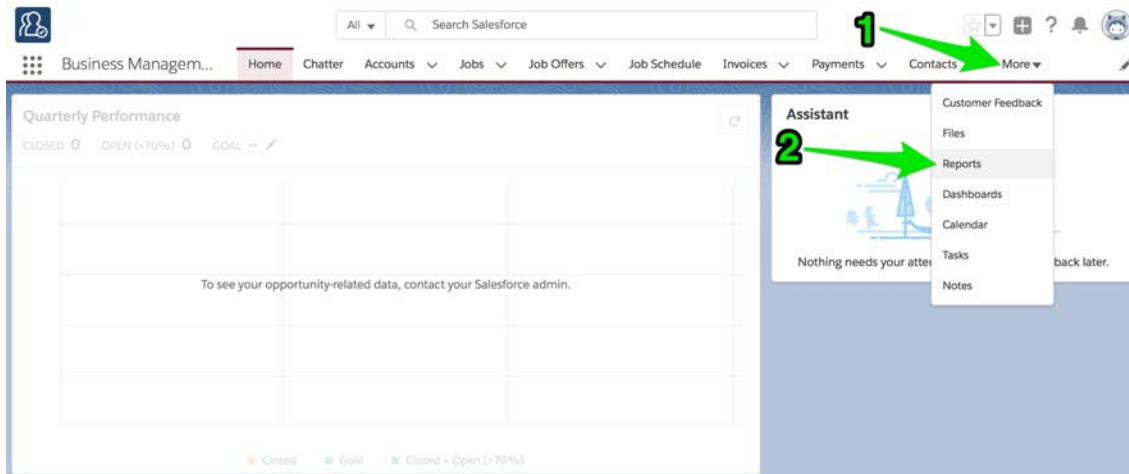
# Understanding reports

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.

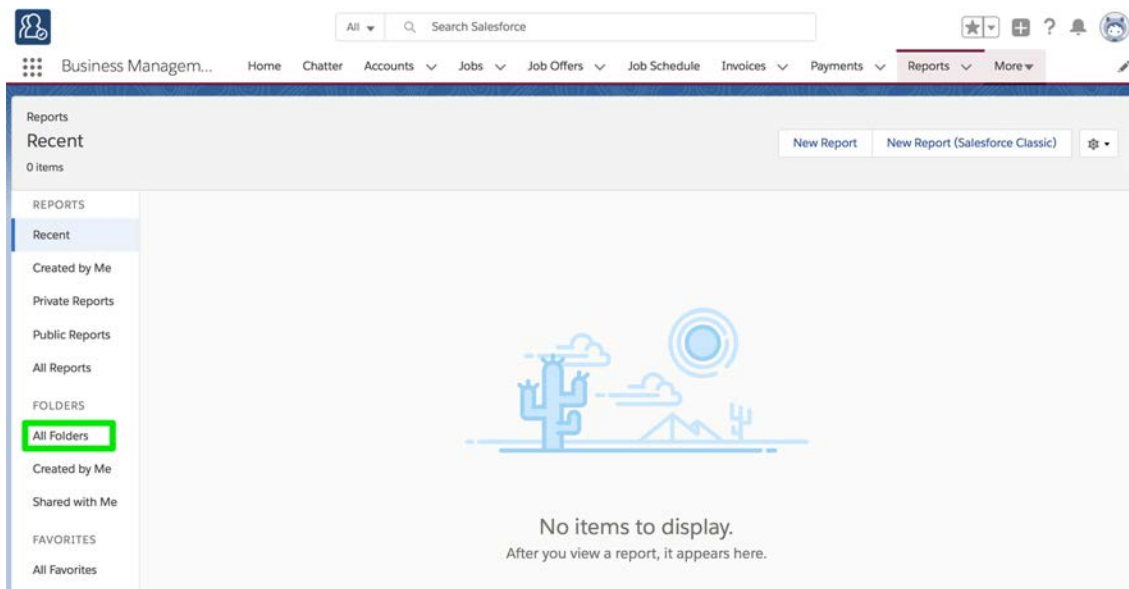
## To discover available reports

1. From the Salesforce menu, choose **More**, then choose **Reports**.



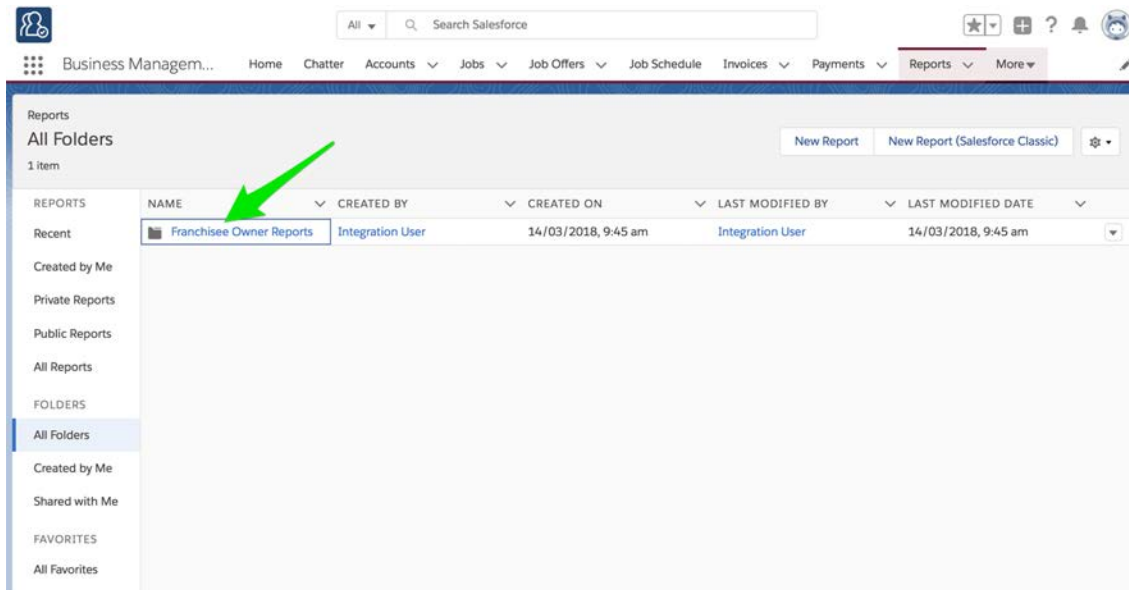
The recent reports folder appears. If you have yet to use a report, this will be blank.

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.

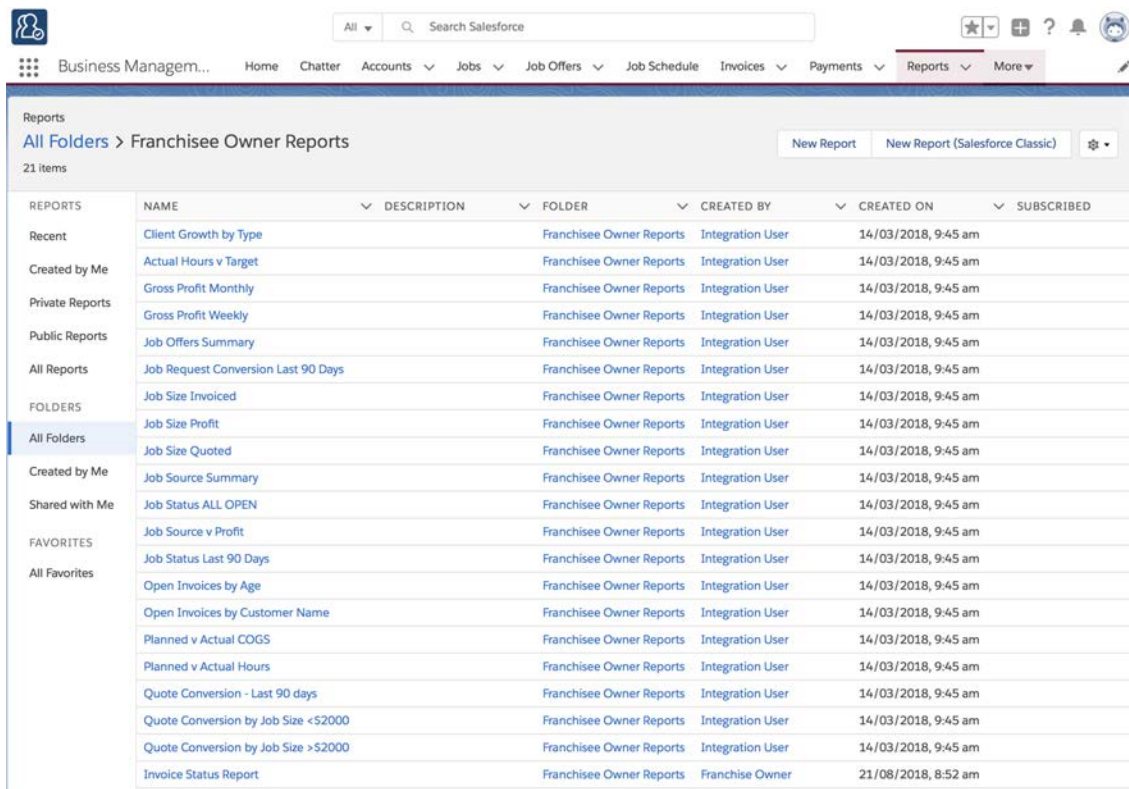
### 3. Select any one of the report folders.



The screenshot shows the Salesforce Reports interface. On the left sidebar, under 'FOLDERS', the 'All Folders' option is selected. The main table lists reports, and a green arrow points to the 'Franchisee Owner Reports' folder in the 'NAME' column. The table has columns: NAME, CREATED BY, CREATED ON, LAST MODIFIED BY, and LAST MODIFIED DATE.

REPORTS	NAME	CREATED BY	CREATED ON	LAST MODIFIED BY	LAST MODIFIED DATE
Recent	Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	Integration User	14/03/2018, 9:45 am

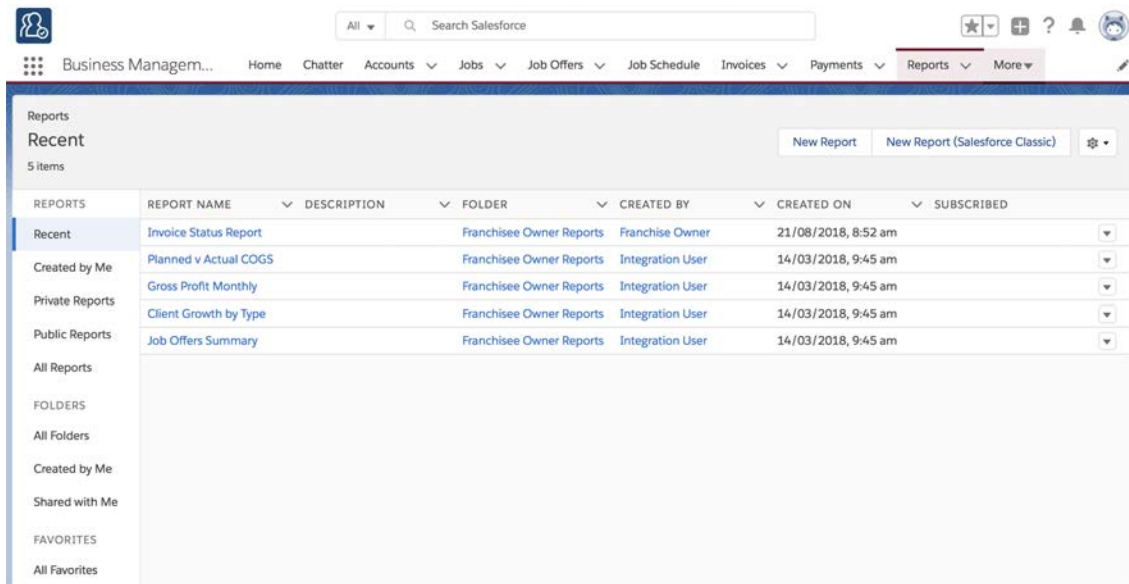
Now you can see the reports within that folder.



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 items with columns: NAME, DESCRIPTION, FOLDER, CREATED BY, CREATED ON, and SUBSCRIBED.

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	
	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	
	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 displays the Salesforce Business Management interface, specifically the Reports section. The top navigation bar includes a search bar and various utility icons. The main content area shows a list of reports under the 'Recent' tab. The reports are organized into a table with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are:

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	
Public Reports	Client Growth by Type		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	
	Job Offers Summary		Franchisee Owner Reports	Integration User	14/03/2018, 9:45 am	

The sidebar on the left provides navigation options for Reports, including Recent, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The top navigation bar includes links for Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Payments, Reports, and More.

# 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 screenshot shows the Salesforce 'Invoice Status Report' interface. The report header includes a 'More' button in the top right corner. A green arrow labeled '1' points to this button. A dropdown menu is visible, showing options like 'Edit (Salesforce Classic)', 'Save As', 'Export', and 'Add to Dashboard'. A green arrow labeled '2' points to the 'Export' option in this menu.

SYNC STATUS	INVOICE: INVOICE NUMBER	ACCOUNT	JOB	INVOICE DATE	DUE DATE	AMOUNT INC TAX	AMOUNT PAID	AMOUNT OWING	AMOUNT CREDITED	STATUS
	INV-00001	Greg Cleary	JN-00059	17/08/2018	17/08/2018	AUD 418.00	AUD 418.00	AUD 0.00	AUD 0.00	x
	INV-00002	Janet Baker	JN-00060	20/08/2018	20/08/2018	AUD 522.50	AUD 150.00	AUD 172.50	AUD 200.00	x
	INV-00006	Mark Williams	JN-00061	21/08/2018	21/08/2018	AUD 330.00	AUD 330.00	AUD 0.00	AUD 0.00	✓
	INV-00007	Mark Williams	JN-00061	21/08/2018	21/08/2018	AUD 192.50	AUD 0.00	AUD 192.50	AUD 0.00	x
Grand Total (4 records)						AUD 1,463.00	AUD 898.00	AUD 365.00	AUD 200.00	1

The Export dialog box appears.

2. Choose between a **Formatted Report** and a **Details Only** report.

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

Excel Format .xlsx

Cancel Export

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**

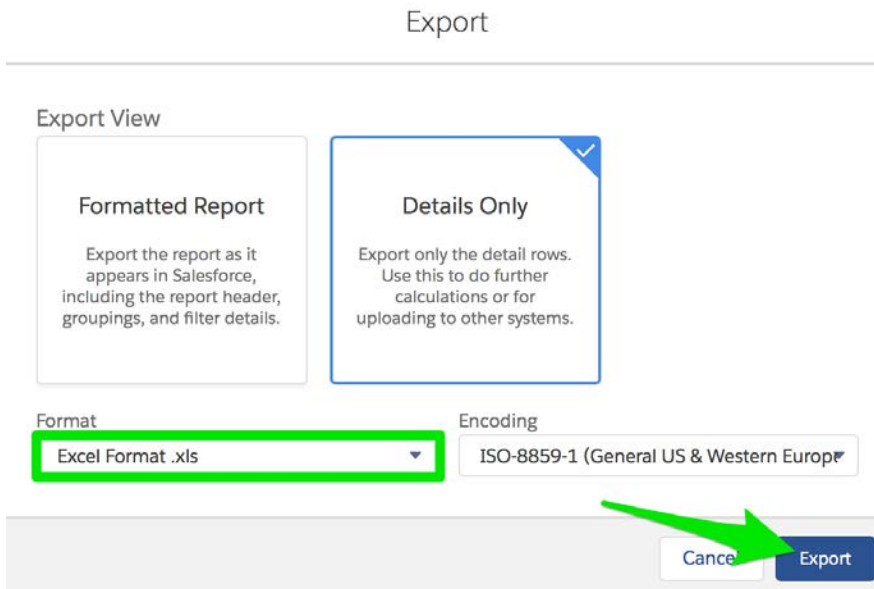
Export the report as it appears in Salesforce, including the report header, groupings, and filter details.

**Details Only**

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format: Excel Format .xls Encoding: 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
Knowledge Base .....	cdlxvii
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](mailto: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

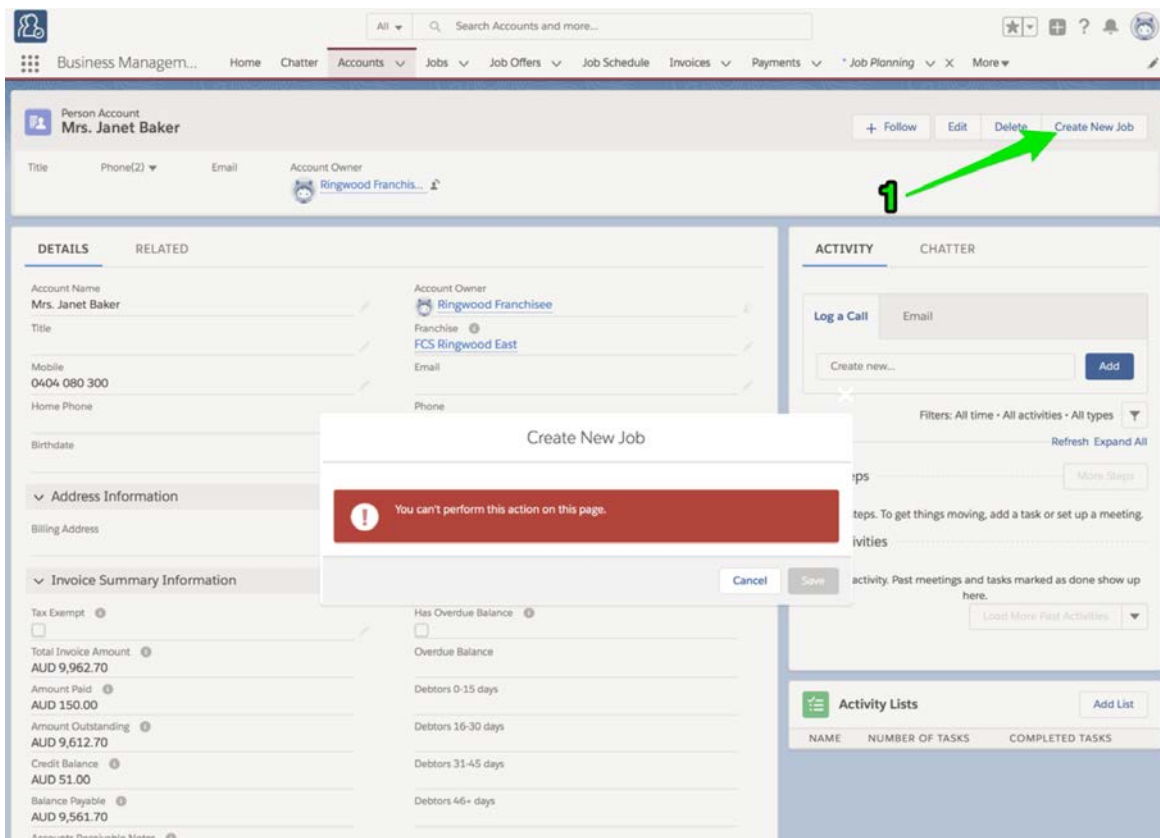
Cannot create new job from a customer's Account page.

*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.

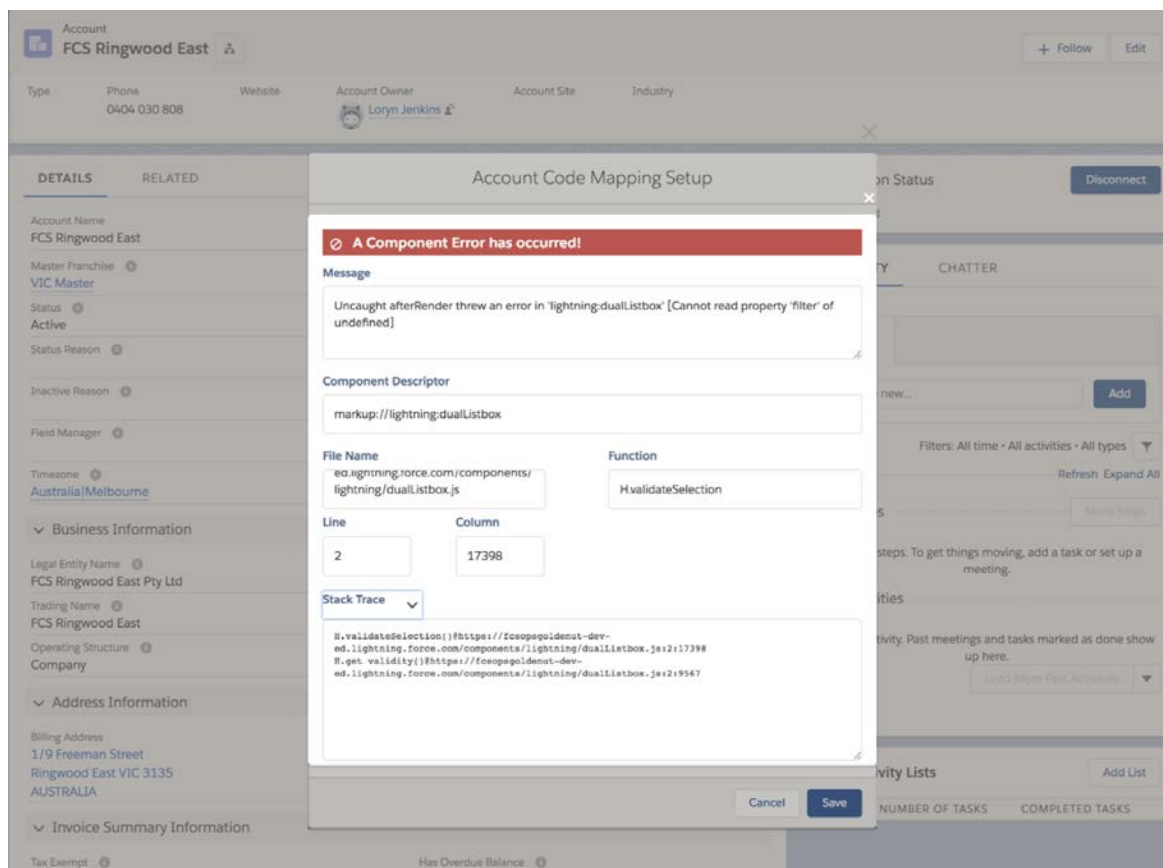
I'm logged into Golden UAT as system administrator.

*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.-](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js)

[lightning.force.com/components/lightning/dualListbox.js](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js)

Function

H.validateSelection

Stack Trace

H.validateSelection()@[https://fcsopsgoldenut-dev-ed.-](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js)

[lightning.force.com/components/lightning/dualListbox.js](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js):2:17398

H.get validity()@[https://fcsopsgoldenut-dev-ed.-](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js)

[lightning.force.com/components/lightning/dualListbox.js](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

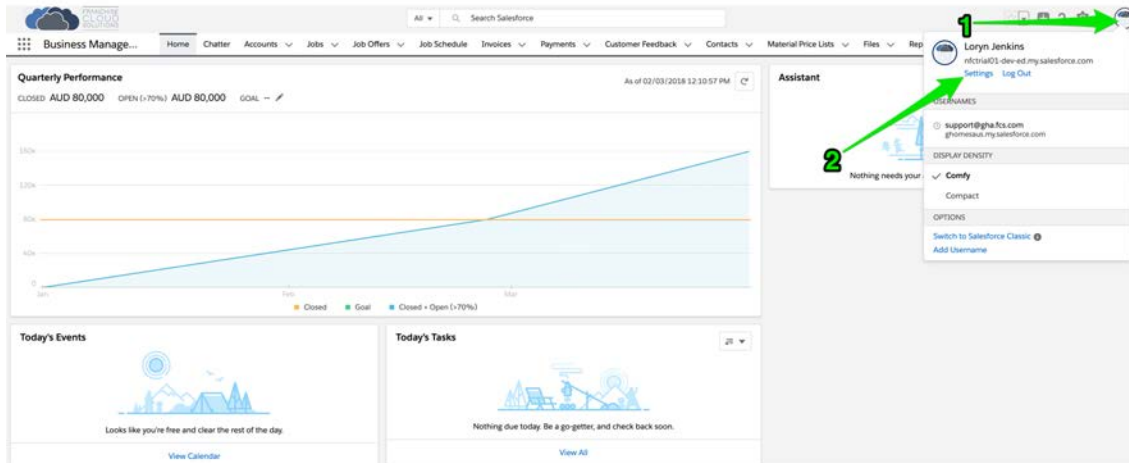
- » Who affected: All franchisees, Users of Job Calendar.
- » Visibility: 40 times per month per franchisee.
- » Block: None.

# Granting Account Login Access

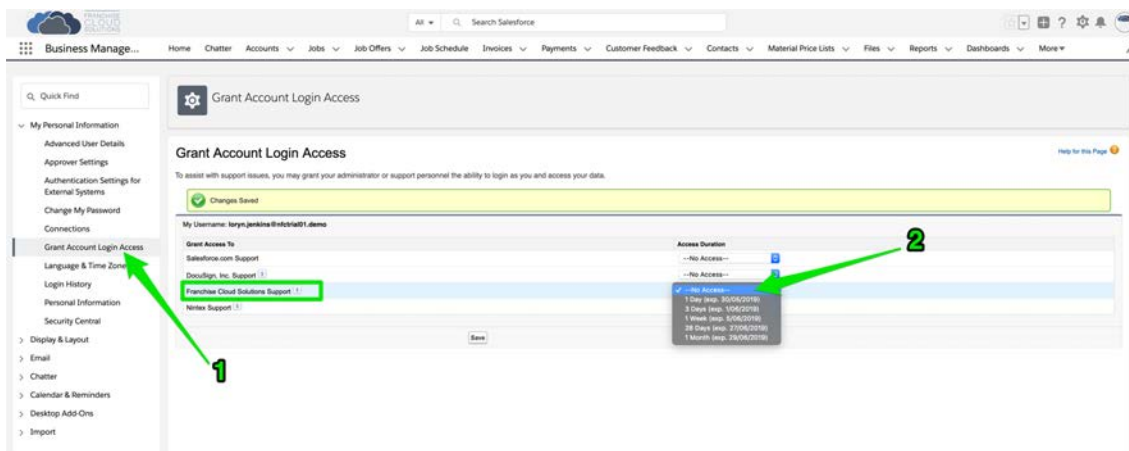
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

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.

The screenshot shows the 'Grant Account Login Access' page in the Salesforce Business Management interface. The page title is 'Grant Account Login Access'. Below the title, there is a message: 'To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.' A green banner indicates 'Changes Saved'. The user's username is 'larry.jenkins@cdlxxvii.com'. The table below lists the granted access:

Grant Access To	Access Duration
Salesforce.com Support	--No Access--
Doodlelog, Inc. Support	--No Access--
Franchise Cloud Solutions Support	1 Week (exp. 5/05/2018)
Nitex Support	--No Access--

A green arrow points to the 'Save' button at the bottom of the table.



You can revoke access at any time.