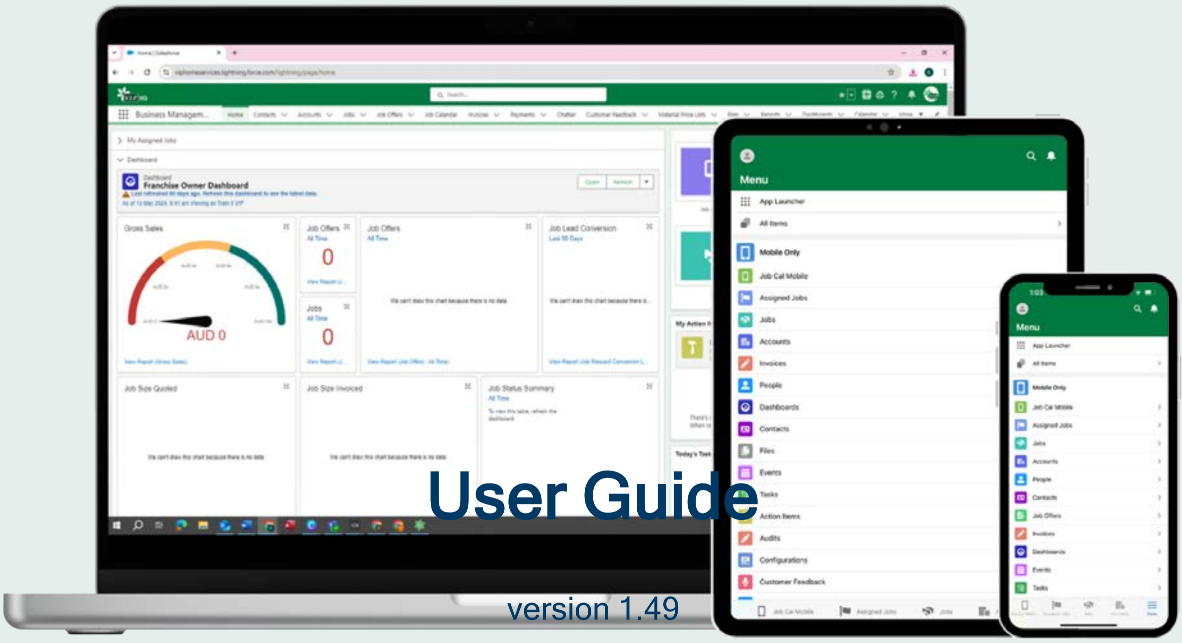
User Guide

version 1.49

V.I.P Business Management Suite



User Guide

version 1.49

FRANCHISE CLOUD SOLUTIONS

FranchiseOps version 1.198-1.426

Franchise Cloud Solutions

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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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CHAPTER 2

Getting Started

Introduction

Welcome to Franchise Cloud Solutions Business Management .

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

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

Business Management will help any franchisee:

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

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

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

Benefits compared to using accounting software alone:

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

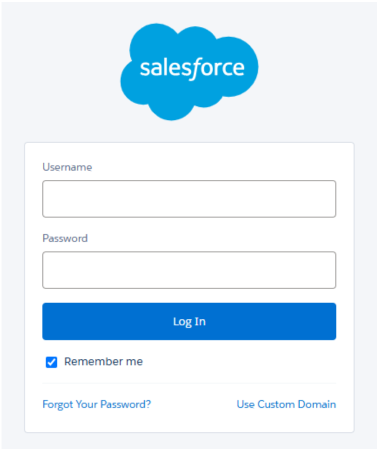
- Business Management ultimately saves time spent on administration, allowing for more productive work and/or a more flexible lifestyle.
- Collaborate with your franchisor to receive better support and achieve your business goals.

Logging In

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

Desktop

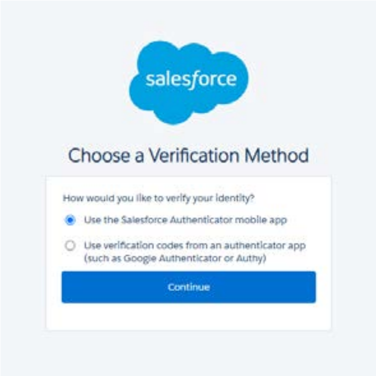
1. Go to login.salesforce.com.



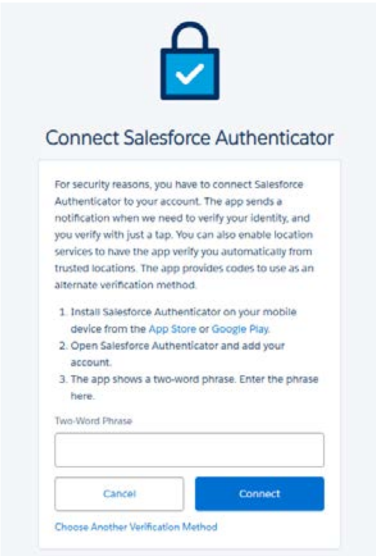
2. Download the Salesforce Authenticator app on your mobile.

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

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



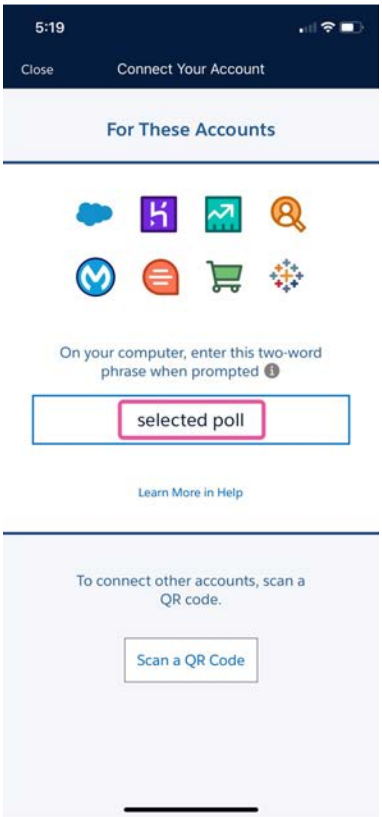
5. The ‘Connect Salesforce Authenticator’ screen will appear.



6. Open the Salesforce Authenticator app on your mobile.

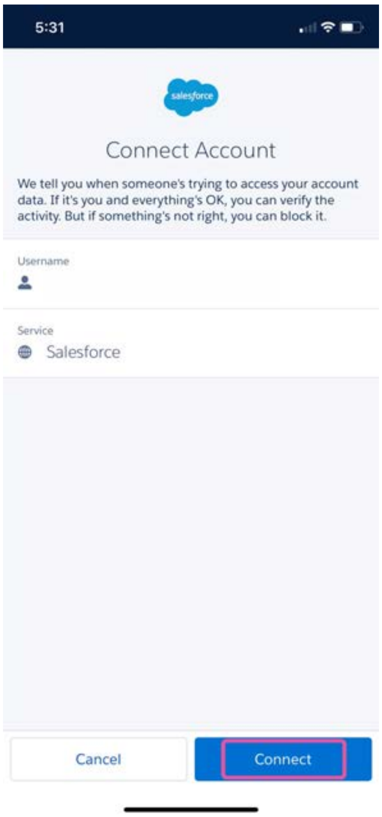
7. Tap **Add an Account**.

8. A two-word phrase will be displayed.



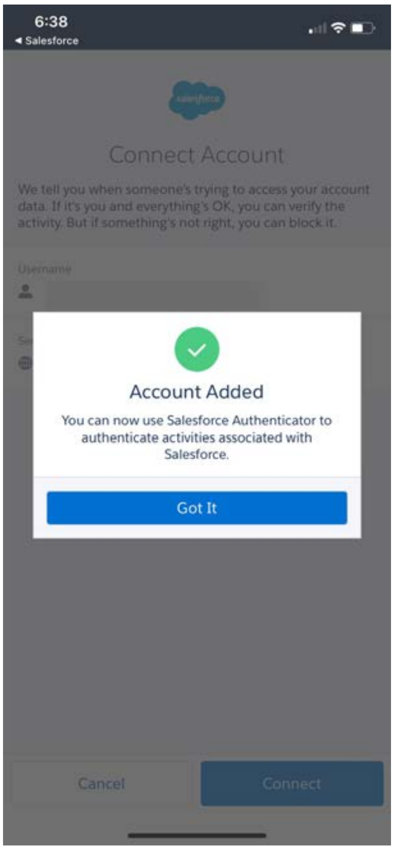
9. Enter the two-word phrase as it appears into the field box on your desktop, and press **Connect**.

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



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

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

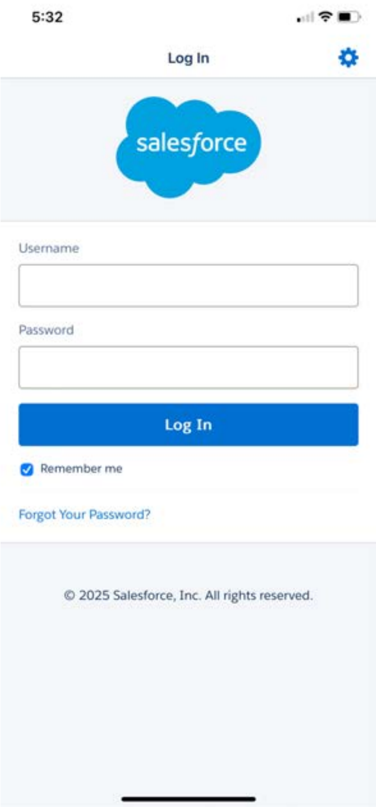


Mobile

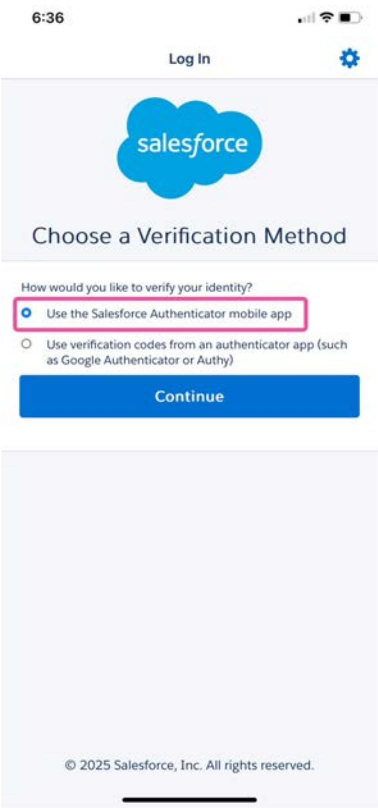
1. Download the Salesforce app.

2. Download the Salesforce Authenticator app.

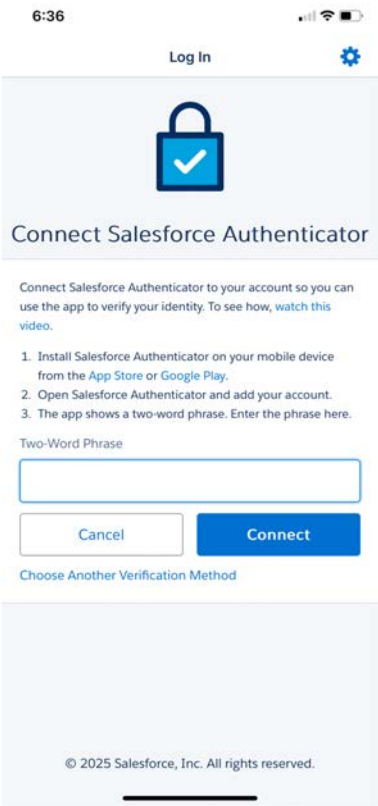
3. Open the Salesforce app.
4. Enter your `Username` and `Password`. Check the **Remember me** checkbox then tap **Log In**.



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



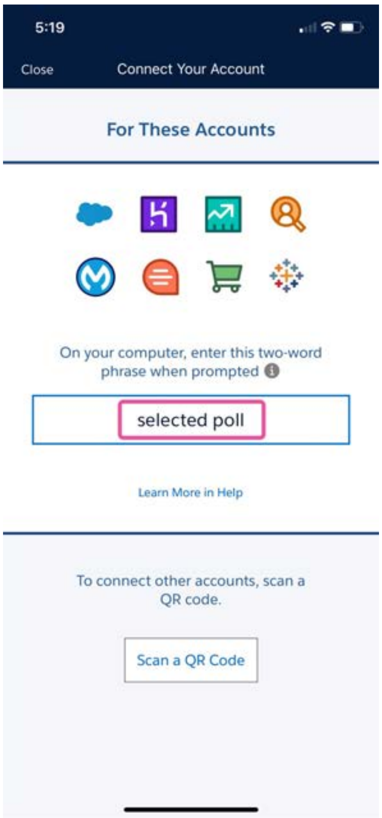
6. The ‘Connect Salesforce Authenticator’ screen will appear.



7. Open the Salesforce Authenticator app.

8. Tap **Add an Account**.

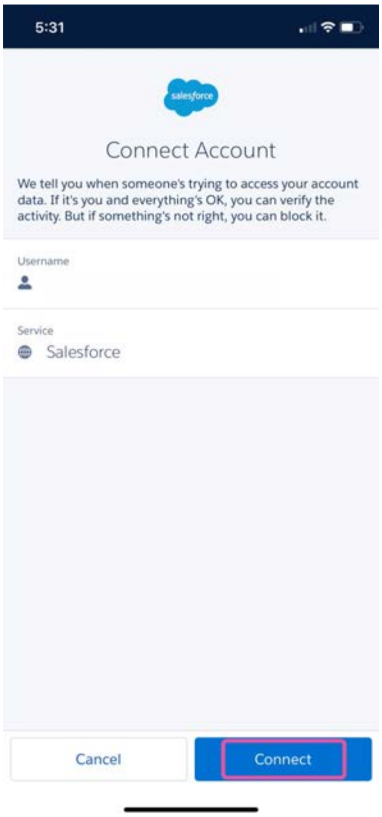
9. A two-word phrase will be displayed. Tap the phrase to copy it to your clipboard.



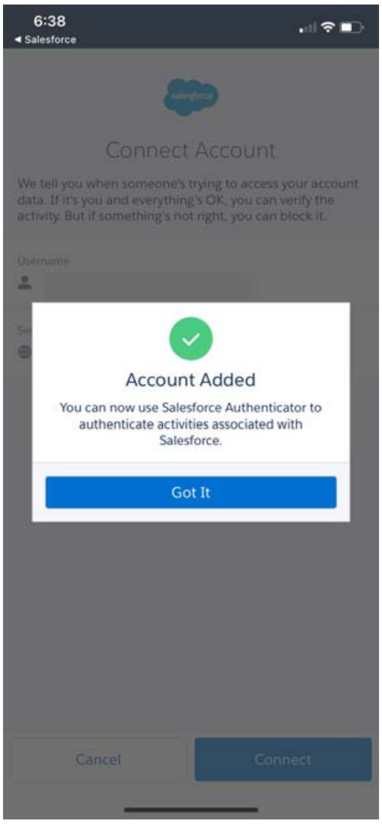
10. Switch to the Salesforce app, paste the two-word phrase into the field box, and press **Connect**.

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

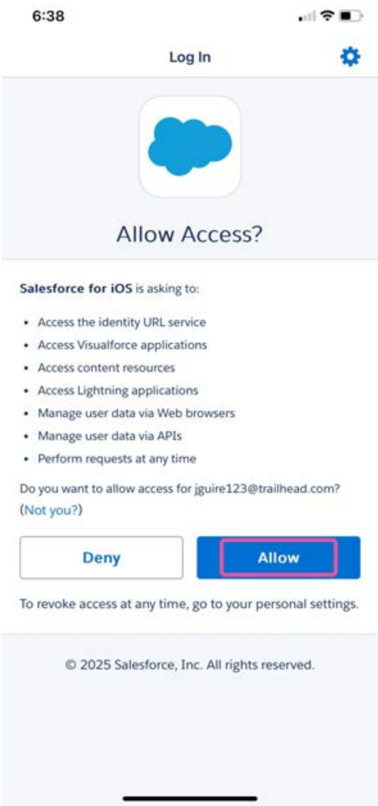
12. The Authenticator app will display the 'Connect Account' page. If the `Username` and `Service` is correct, tap **Connect**.



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



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



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

For further assistance logging into Salesforce, see the Get Started with Salesforce online help.

Configuring Your Franchise Profile Account

Finding Your Franchise Profile Account

See "How to locate your Franchise Profile Account" on page xxxiv

What can be configured:

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

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

To learn how to configure your Franchise Profile account, go to "Working with your Franchise Profile Account" on page xxxii.

The importance of configuring your Franchise Profile Account

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

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

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

Importing Jobs

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

Reviewing Jobs

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

1. Customer Account Management

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

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

See 'Matching customer contact details' under **"First customer contact" on page cxiv** to learn how to match the customer or create a new customer account.

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

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

See **"How to create an account for a business" on page lxxx**.

2. Appointment Scheduling

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

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

For scheduling jobs on a desktop, see **"Scheduling Jobs" on page cxcviii**.

For scheduling jobs on mobile using **Job Calendar Mobile**, see **"Scheduling a job" on page cccxviii**.

Daily Use

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

Receiving Job Requests: "Introducing job offers" on page lxxxvii

Booking appointments: "How to schedule a new appointment" on page cxcviii

Daily run sheet on Job Calendar Mobile: "Viewing today's appointments" on page ccxcvii

Producing and Sending Quotes: "Job planning and estimation" on page cxxv

Creating a quick quote on mobile: "Creating a quick quote" on page cccv

Essential invoicing information for Jobs: "Invoicing a job" on page ccxlix

Invoice Payments: "Recording payments against an invoice" on page cclxxii

The Franchise Cloud Solutions customer support team can assist you if you need additional help not found in the User Guide. See "Accessing Help and Support" on page cdlxvi.

CHAPTER 3

Working with your Franchise Profile Account

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

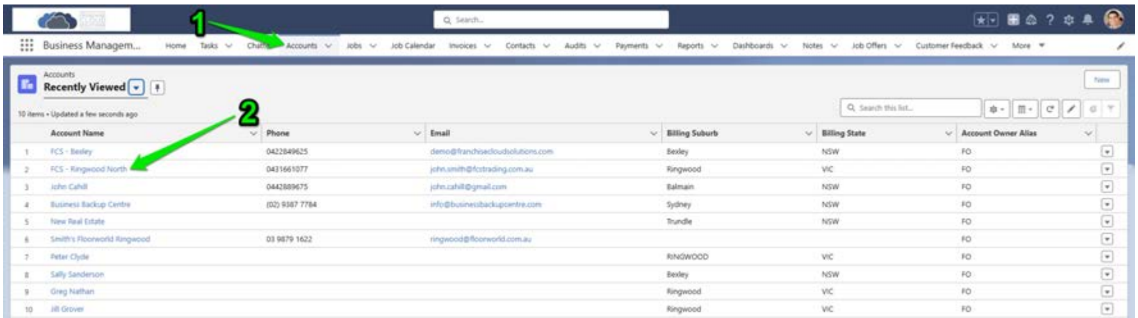
- franchise name and contact details
- hours of business
- where your base of operations is located and how far you are willing to travel to get to a job
- payment methods
- whether you’re open for business or currently on vacation

> 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.

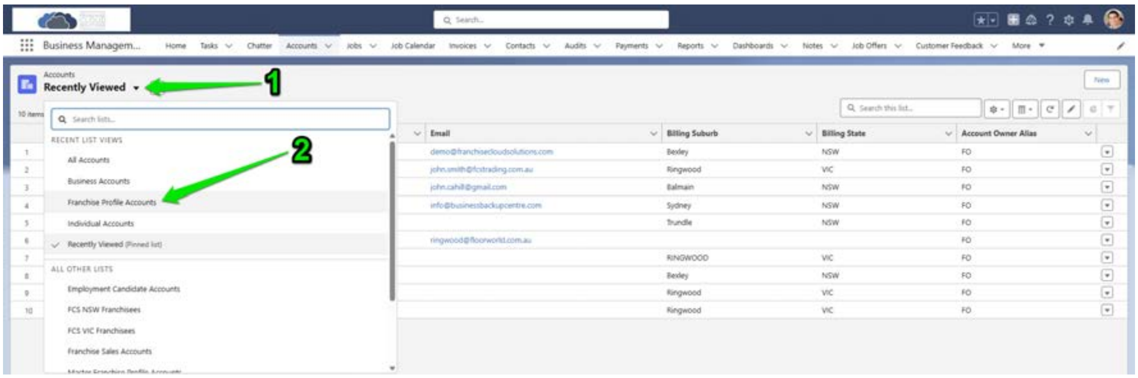
How to locate your Franchise Profile Account

To locate your Franchise Profile Account

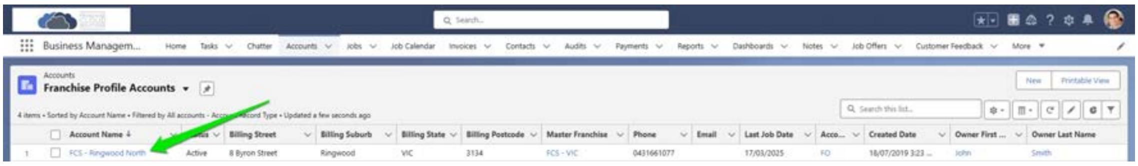
1. Within **Accounts**, check for your business name.



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**.



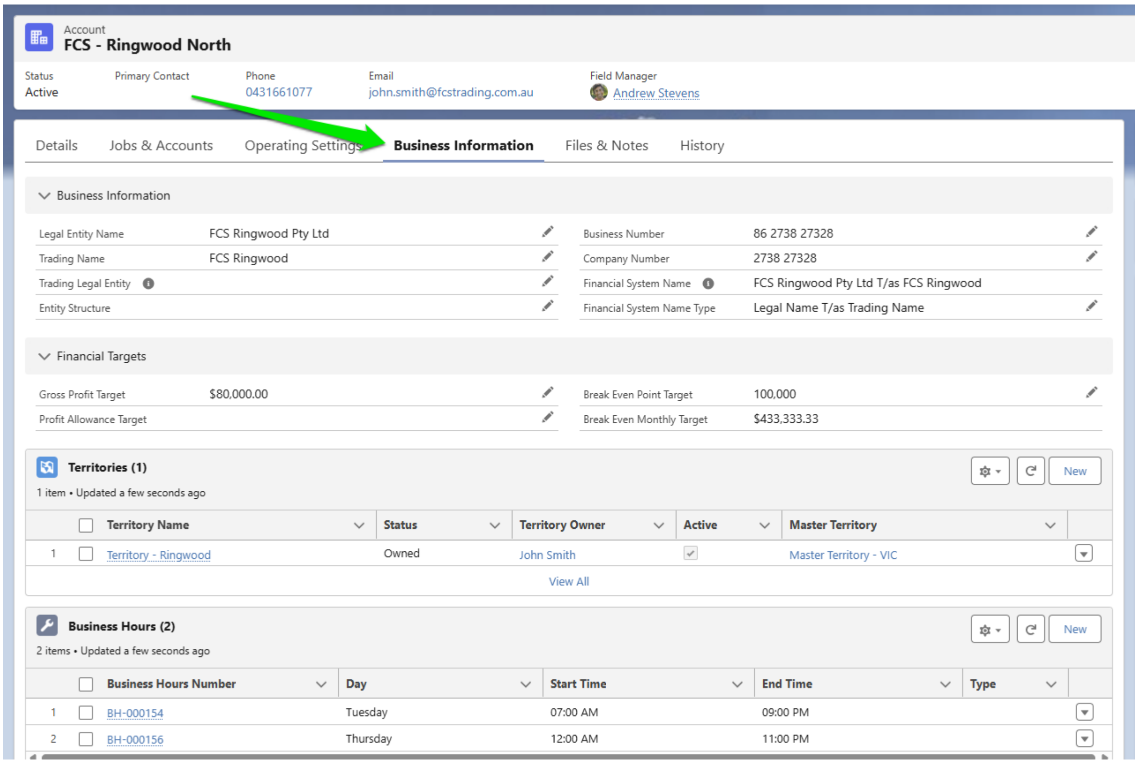
How to set your hours of business

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.

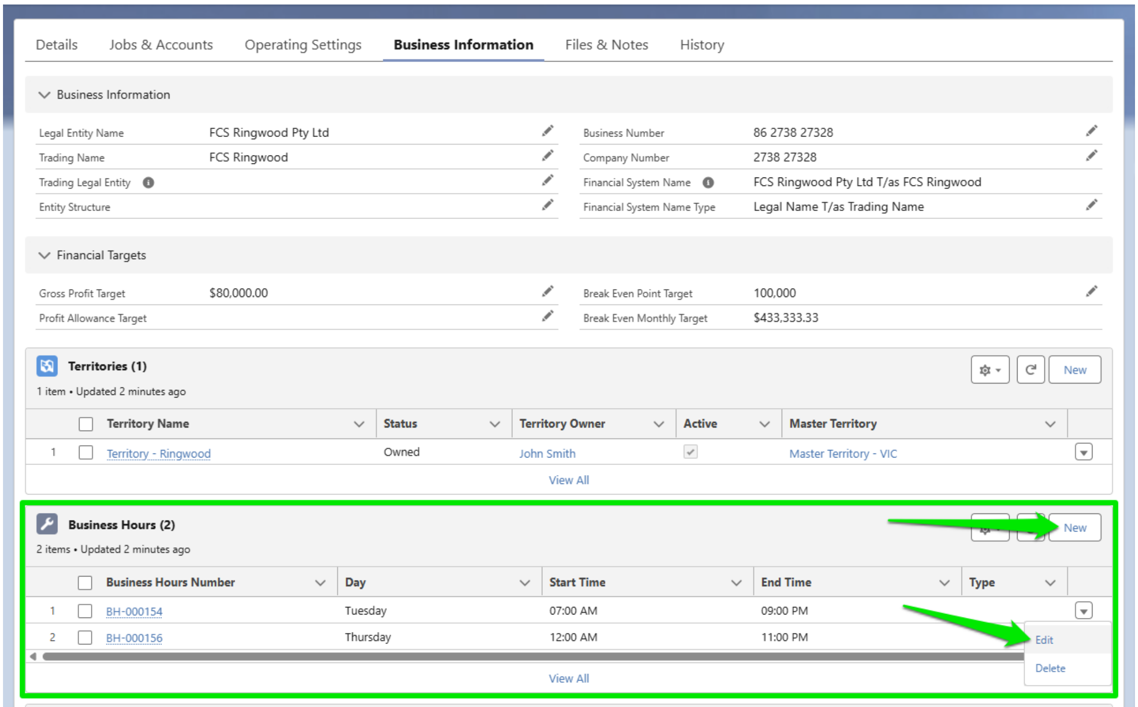
> The Job Allocation System is not influenced by public holidays and will continue to send job offers to franchisees.

To set your hours of business

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

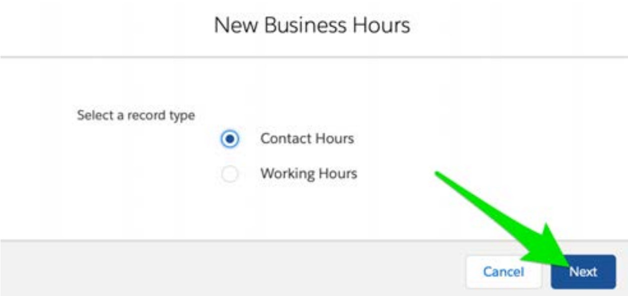


2. Scroll down to the **Business Hours** section, and **Edit**, **Delete** or create **New** records for your daily business hours.



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

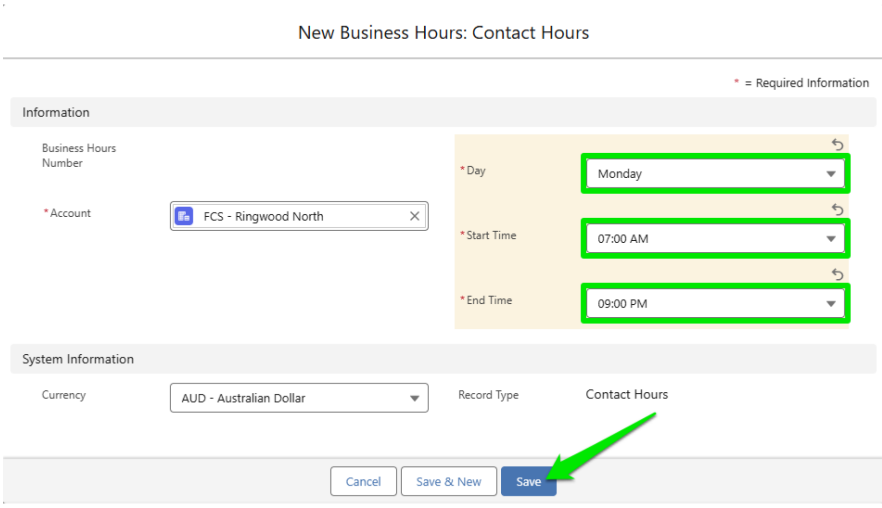
3. Leave the record type as `Contact Hours` and press **Next**.



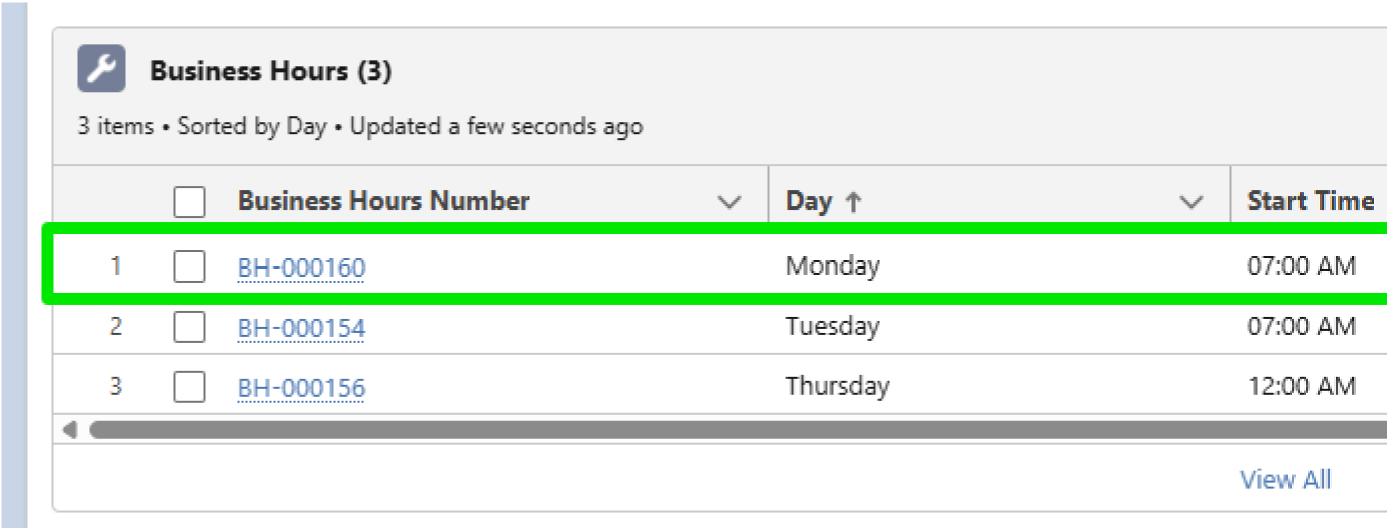
The **New Business Hours: Contact Hours** dialog box displays.

> 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.



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



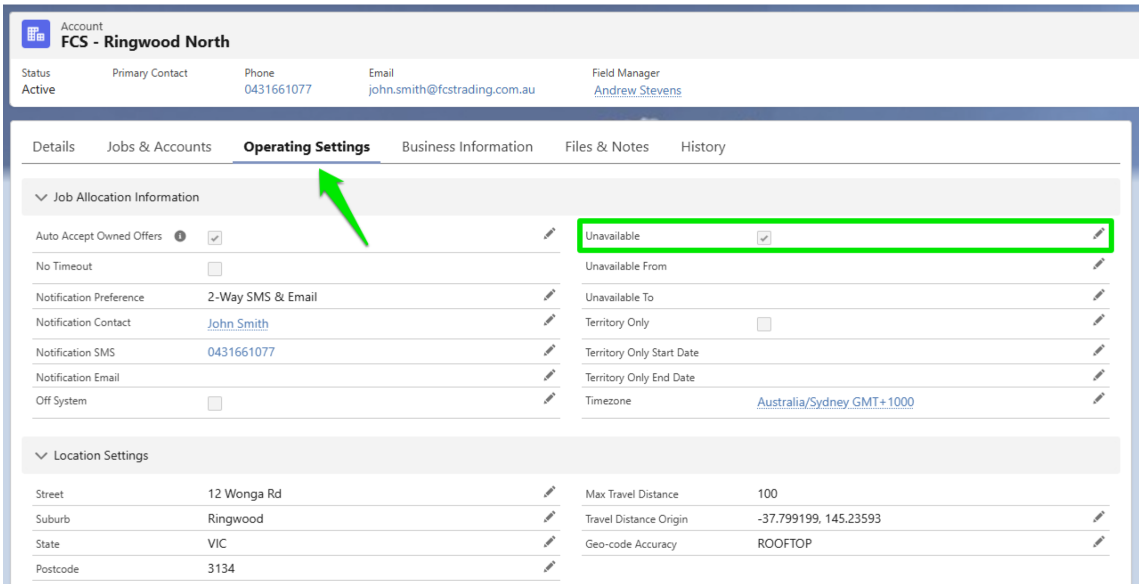
How to indicate temporary unavailability

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.

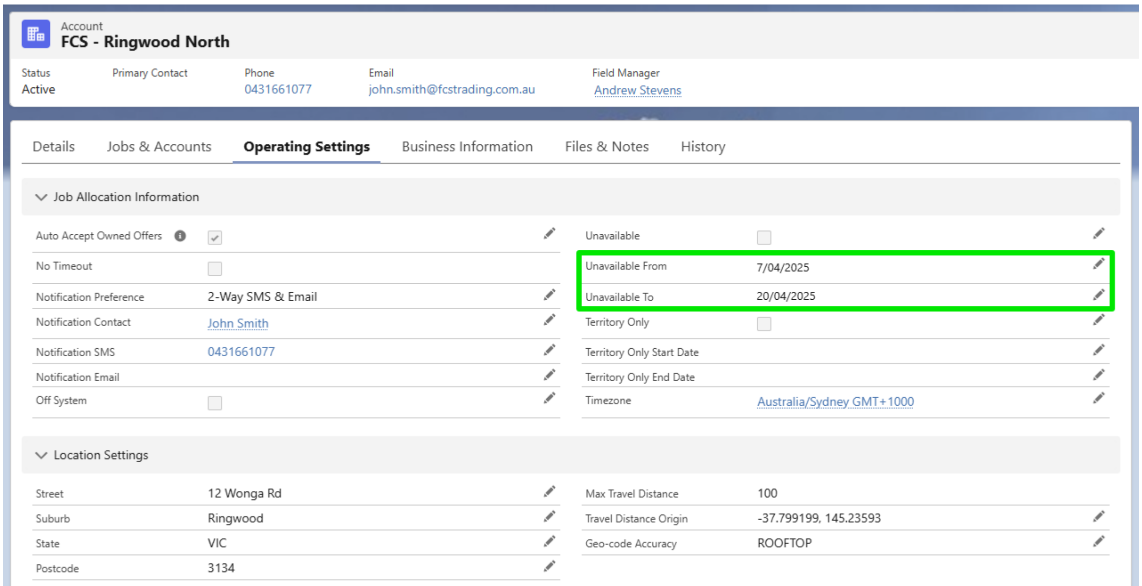
To indicate that a franchise is unavailable to receive job offers

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



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.



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

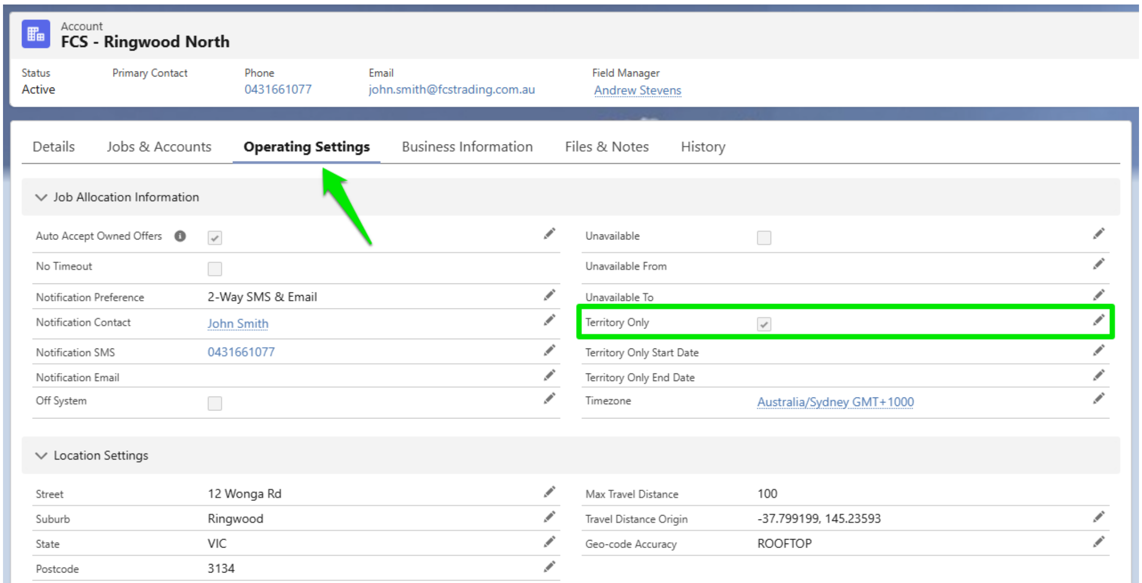
How to restrict job offers to your owned territory

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

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

To restrict a franchise to territory-only offers

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



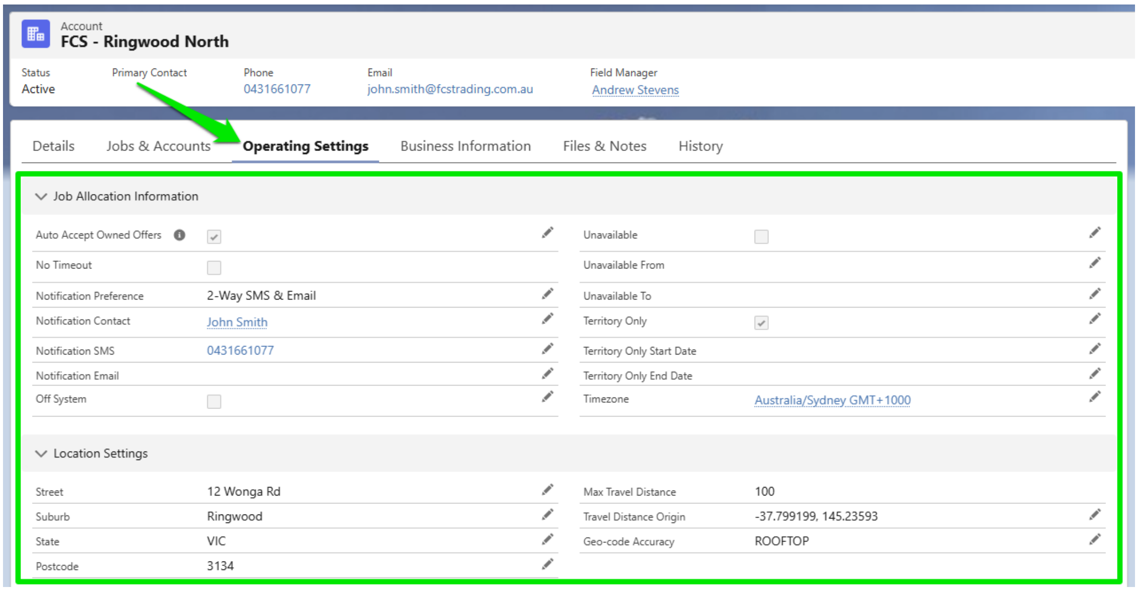
How to adjust job allocation parameters

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

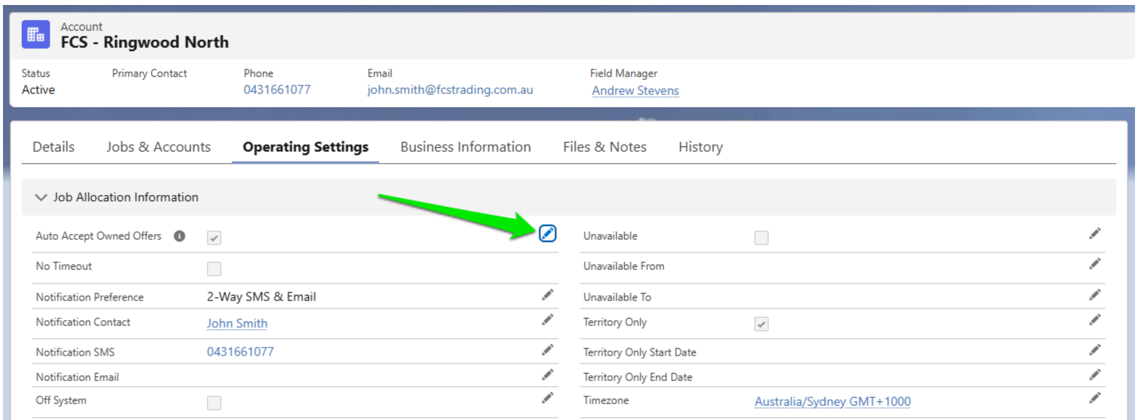
- the distance you travel
- whether or not you receive offers exclusively from your territory
- make yourself unavailable for further offers
- how you are notified of job offers

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.



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



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

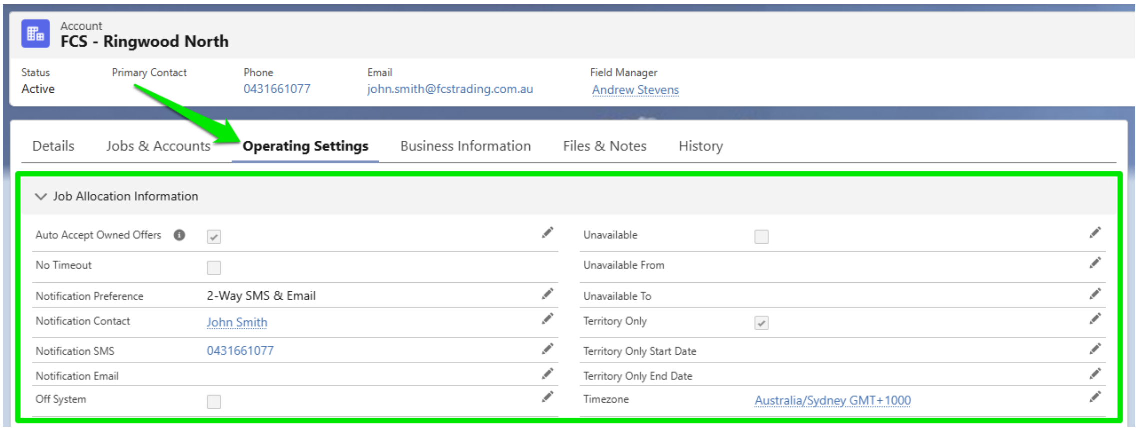
SMS is an optional feature offered by Franchise Cloud Solutions. Check with your field manager to see if your organization has licensed SMS Management.

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

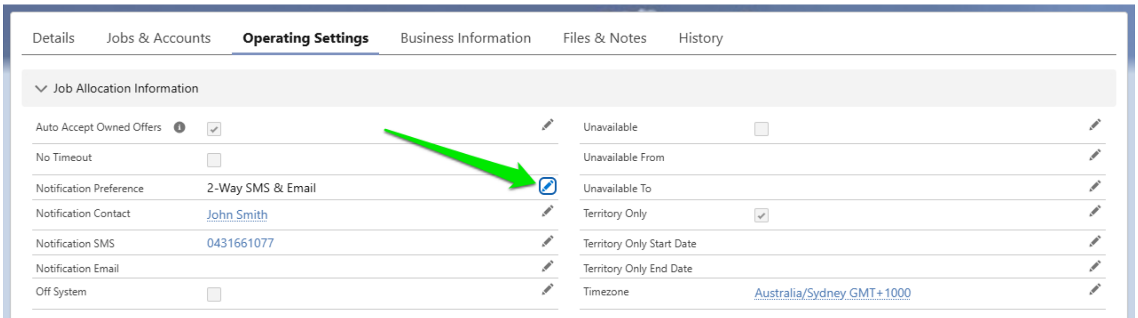
1. Within **Accounts**, look up your business' **Franchise Profile Account**. *See* "How to locate your Franchise Profile Account" on page xxxiv.
2. Within the **Franchise Profile Account**, under the **Operating Settings** tab, locate the **Job Allocation Information** section.



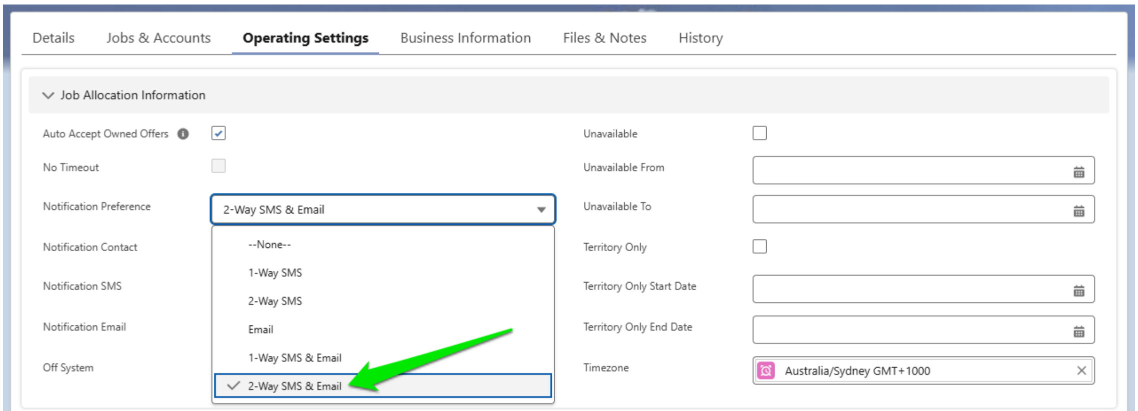
`Notification Preference` controls whether the job offer is sent by email, SMS or both.

3. Select the appropriate option from `Notification Preference`.

   Press **Edit**.



   Select your desired communication preference.

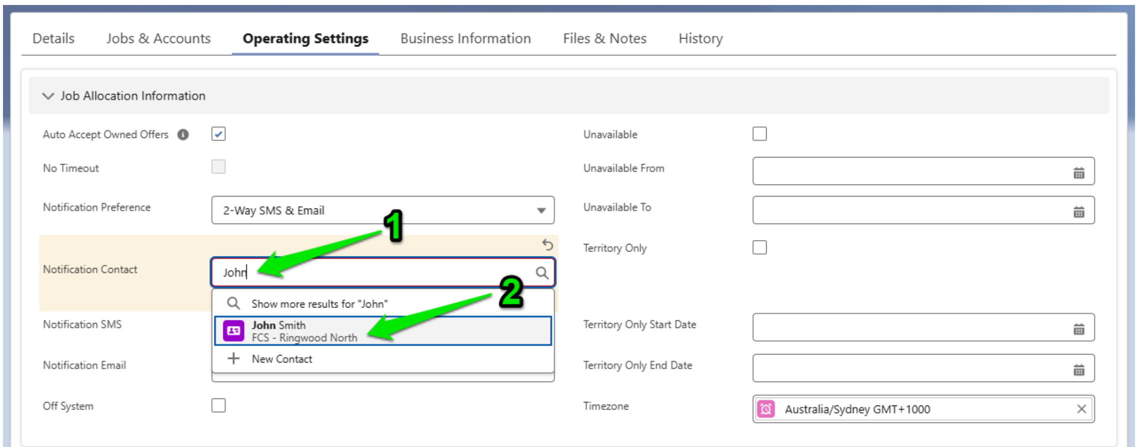


> If SMS options are not available you may not be licensed for SMS Management.

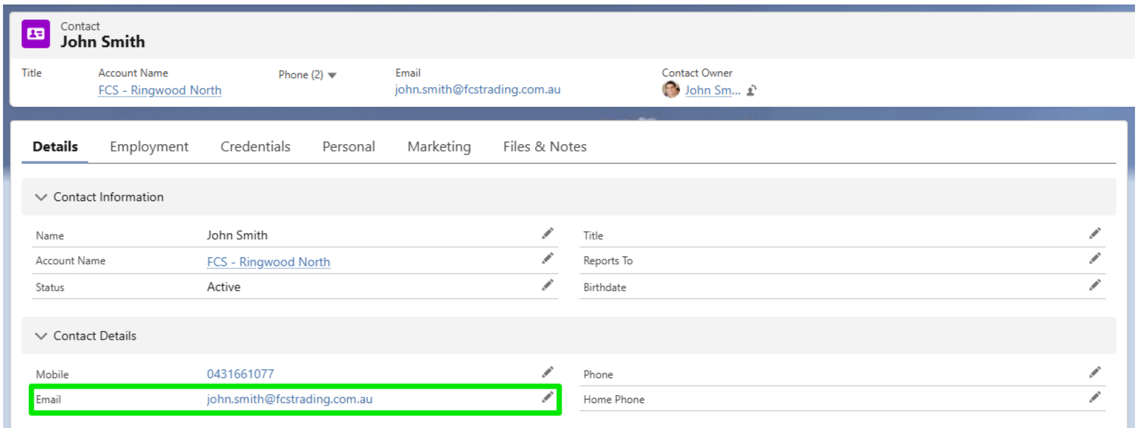
4. If your organization has licensed SMS Management, enter the appropriate mobile phone number into `Notification SMS`.

   Now we need to set the correct notification email.

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



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

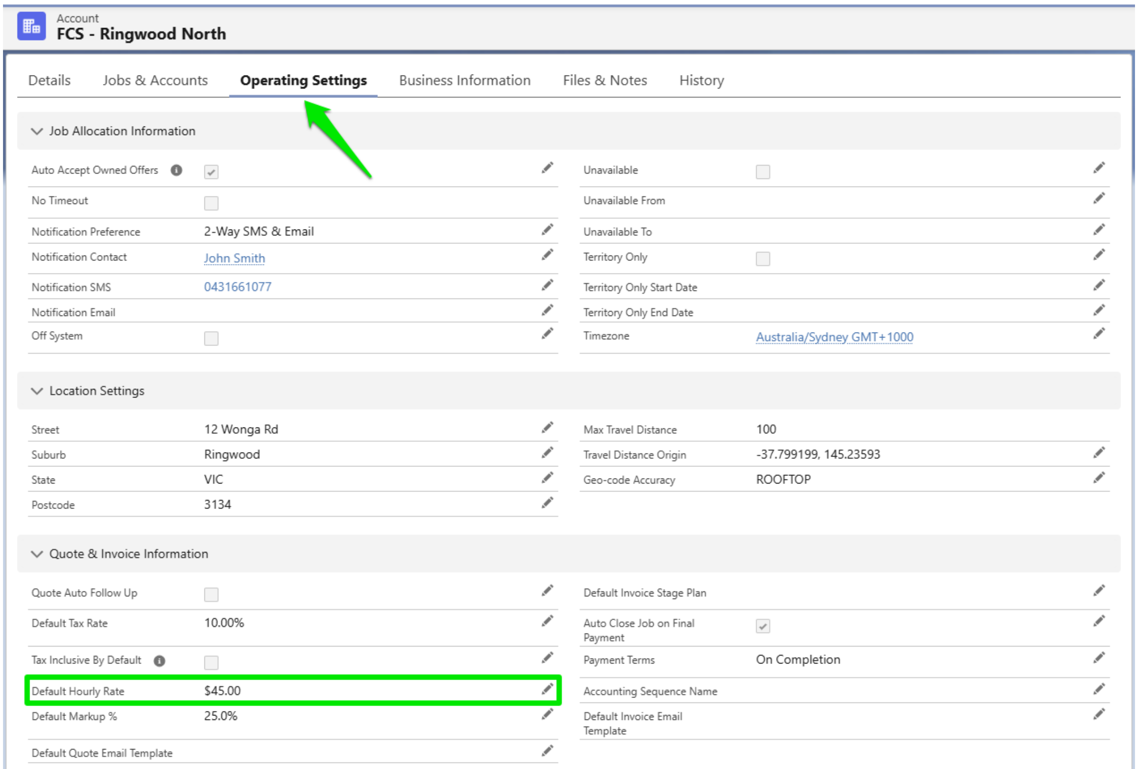


How to set defaults for quotes and invoices

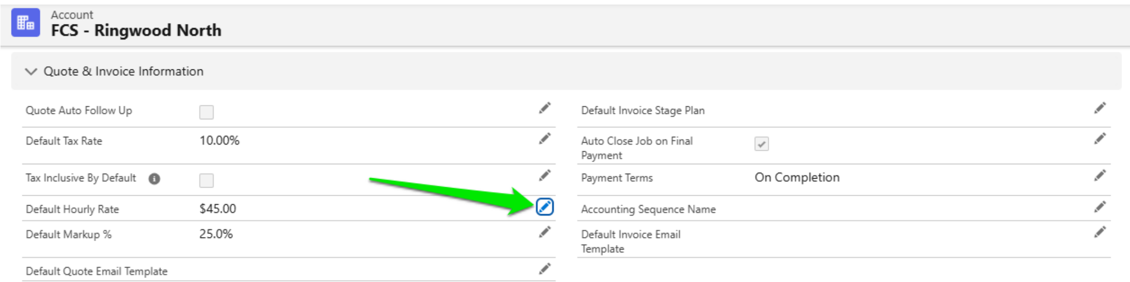
The default hourly rate controls default values that appear within **Job Planner**, **Quote** and **Invoice** pages.

To set your defaults

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



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



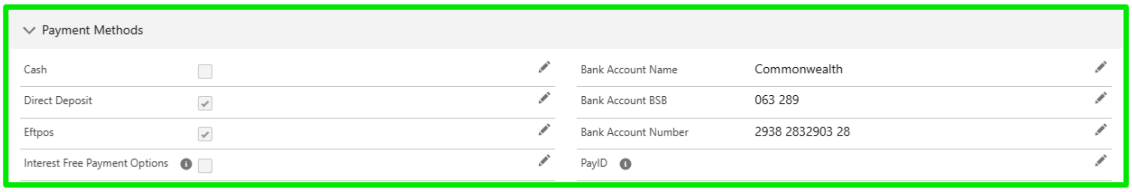
Fields that affect Quotes or Invoices are described below.

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

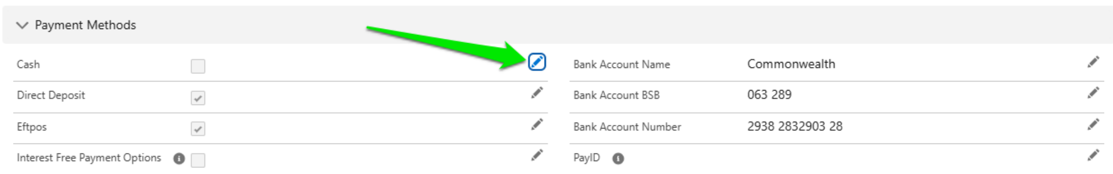
Field	Description
Auto Close Job on Final Payment	When checked, automatically closes a job where all invoiced moneys have been paid.
Default Markup %	Sets the default markup percentage on any materials used in the Job Planning page.
Default Hourly Rate	Sets the default charge-out rate for labor used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

To change the payment methods on invoices

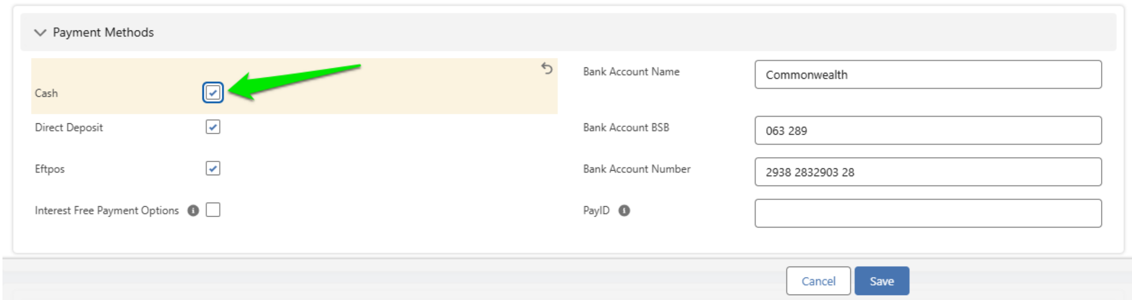
1. From the **Franchise Profile Account**, under the **Operating Settings** tab, scroll down to the **Payment Methods** section.



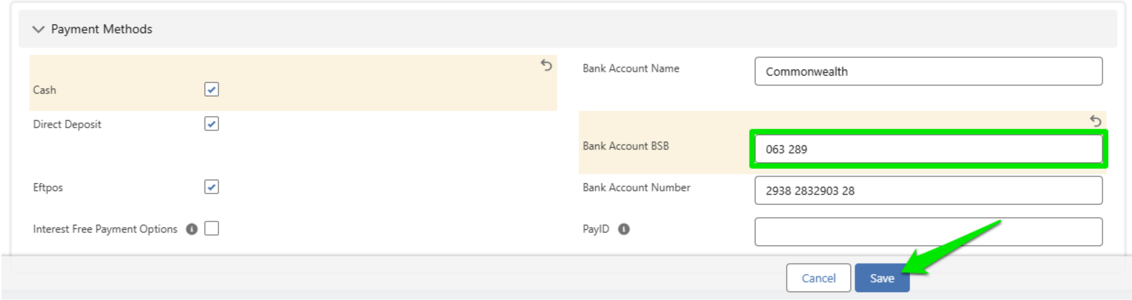
2. To modify which payment methods you accept, click the **Edit** button to switch into edit mode.



3. Check or uncheck any of the payment methods.



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

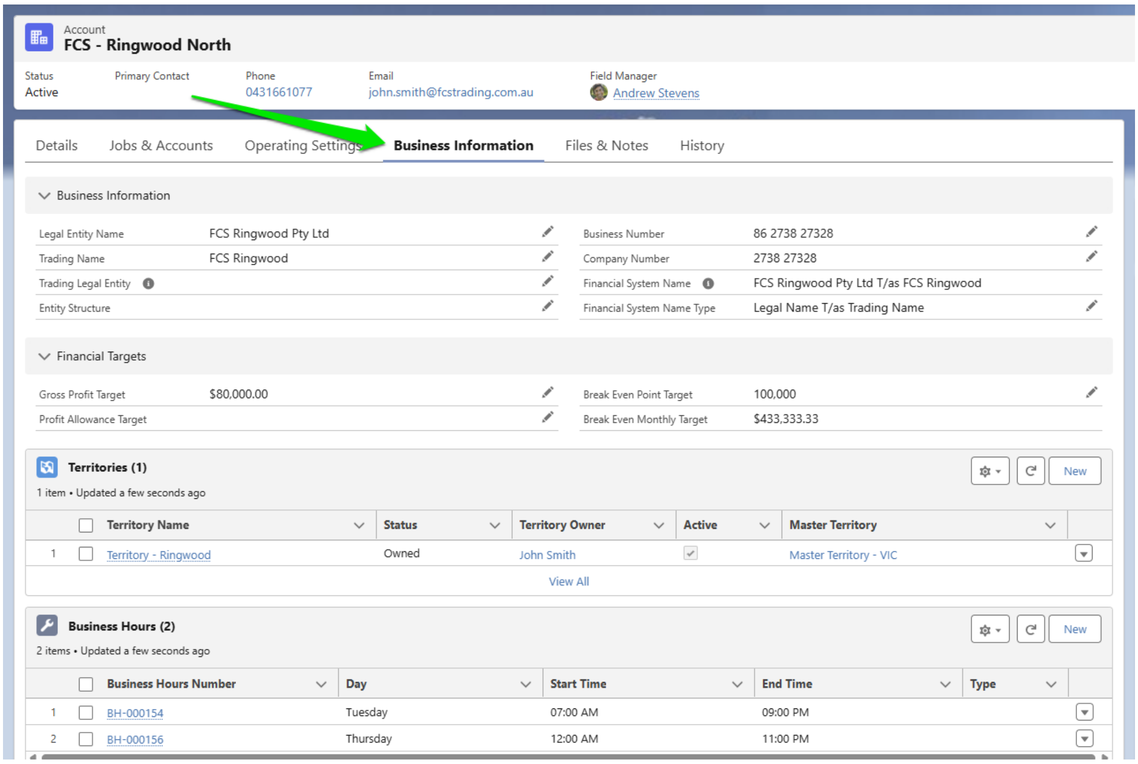


How to add a company asset

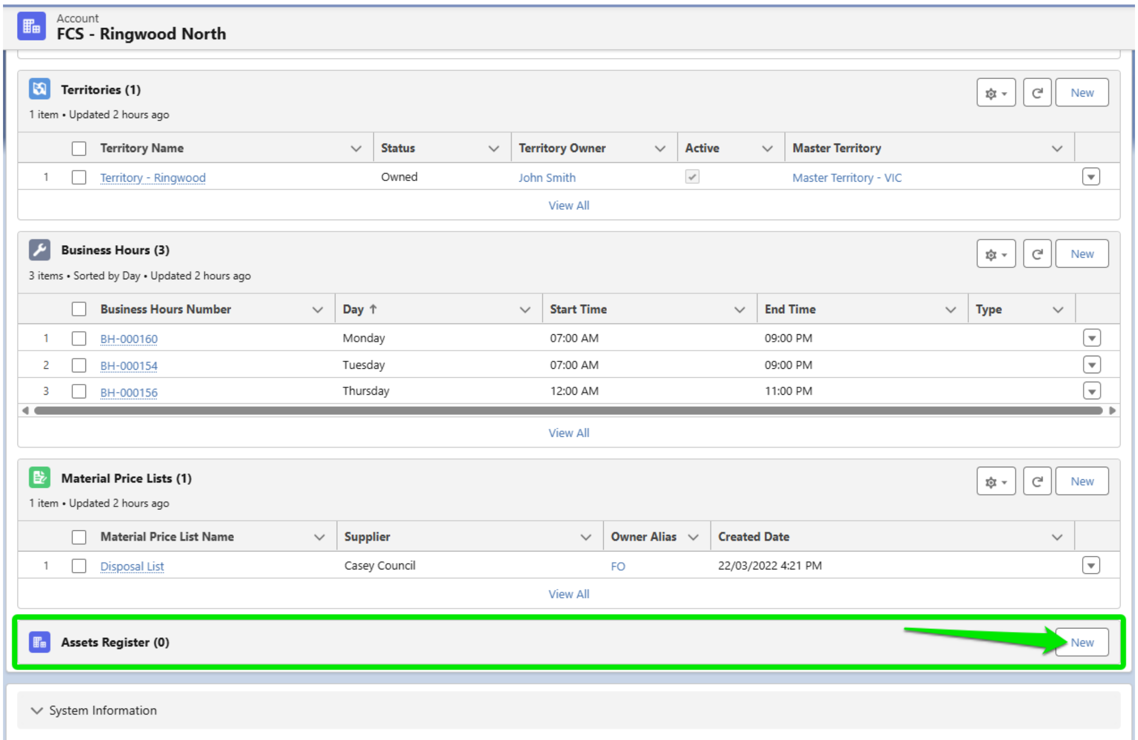
Company owned assets can be registered against the Franchise Profile Account.

To add an asset to the register

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

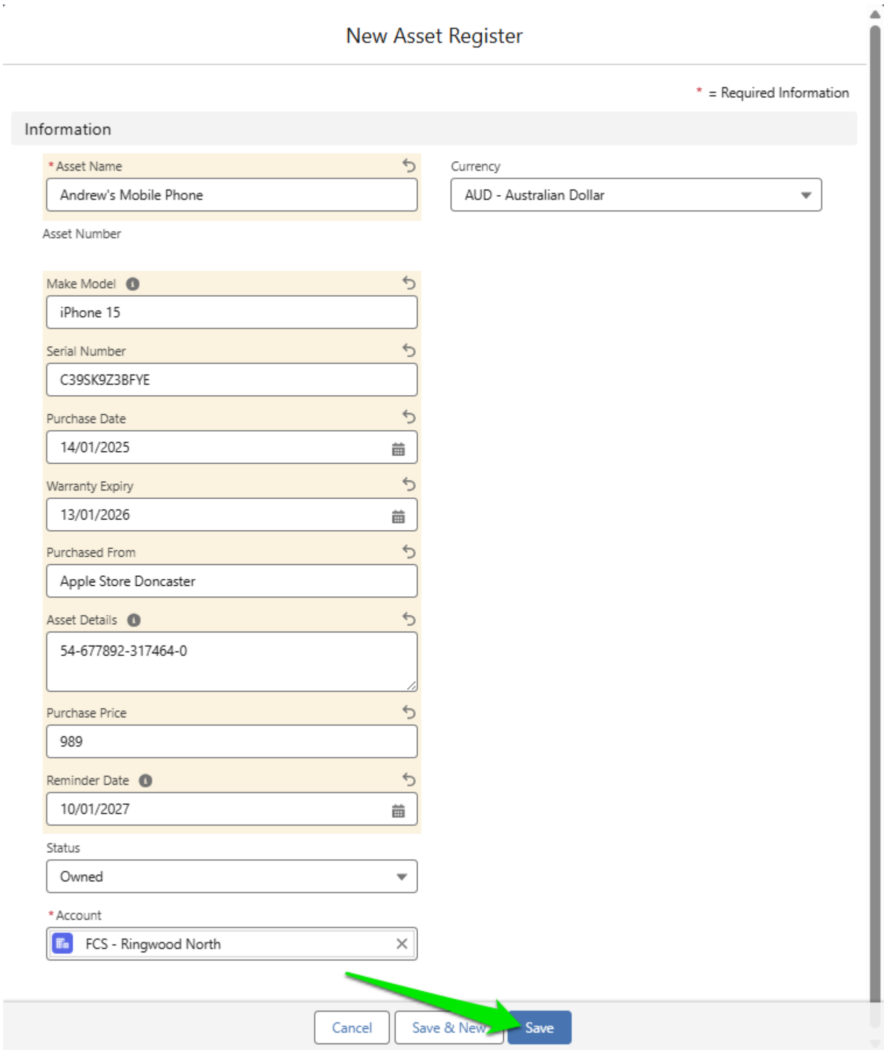


2. Scroll down to the **Assets Register** section and press **New**.

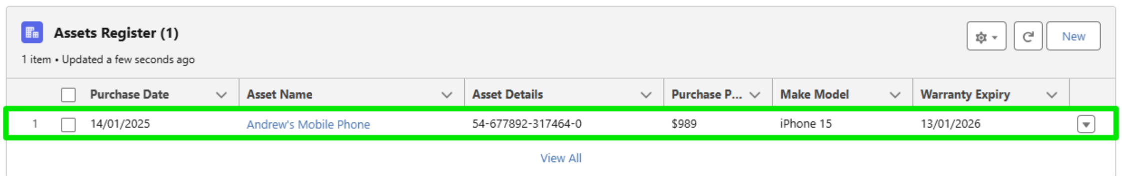


The **New Asset Register** dialog box appears.

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



4. The new asset is now added to the register.



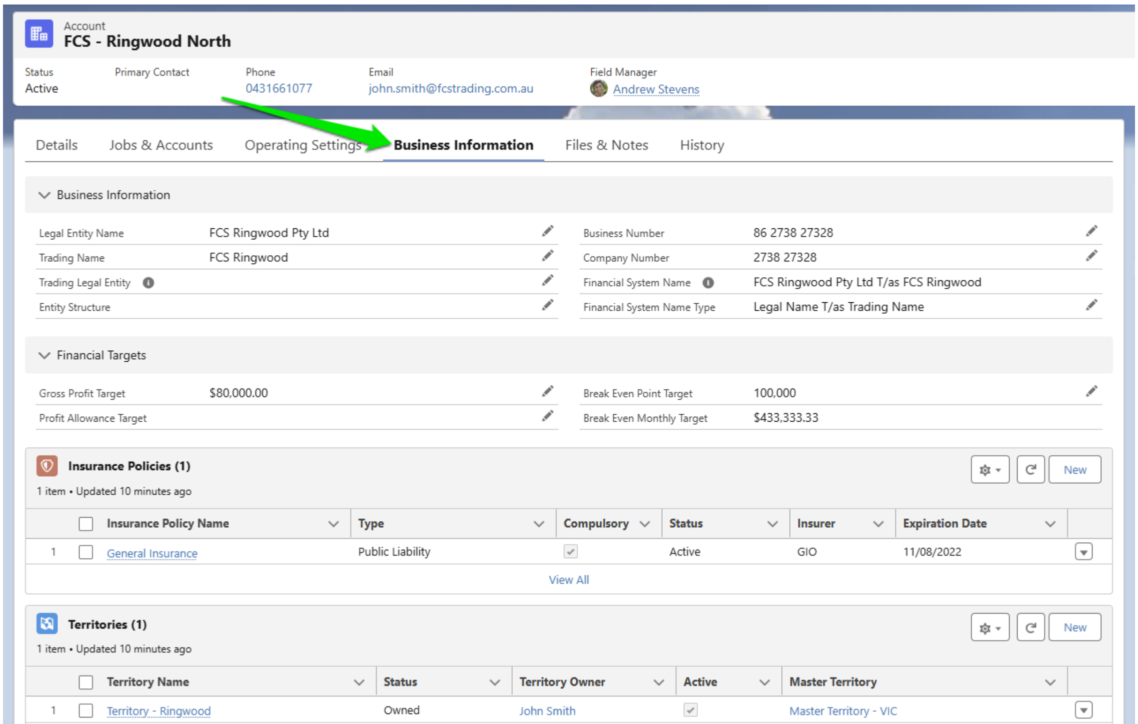
If you insert a reminder date for an asset, you will receive an email on the reminder date notifying you to take action.

How to add an insurance policy

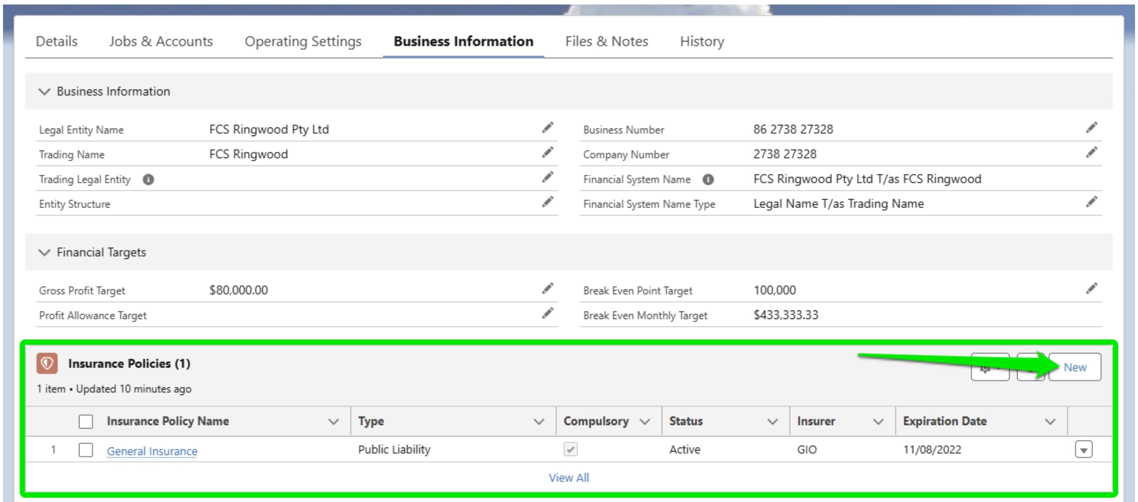
Insurance policies can be added to a list of policies held against the Franchise Profile Account.

To add an insurance policy

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

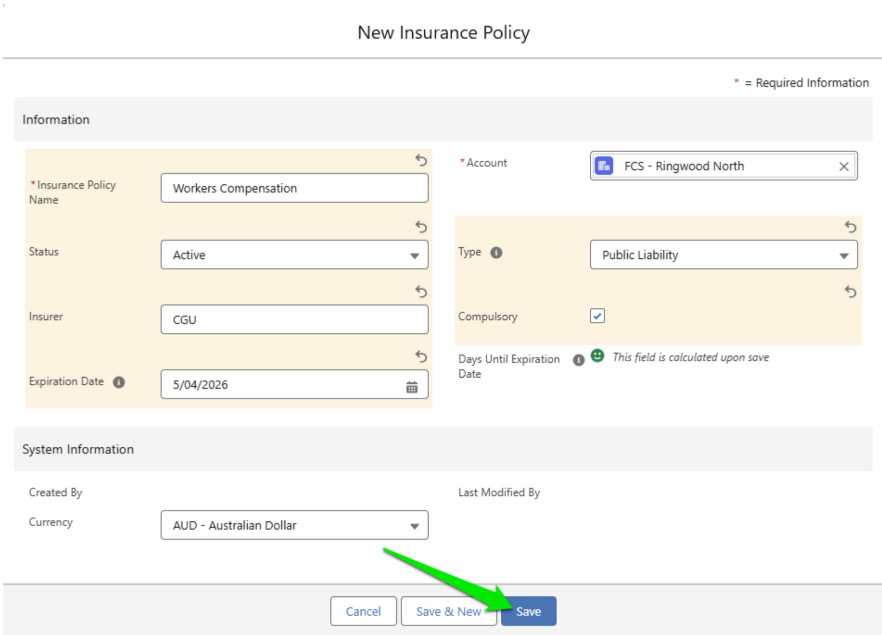


2. Locate the **Insurance Policies** section and press **New**.

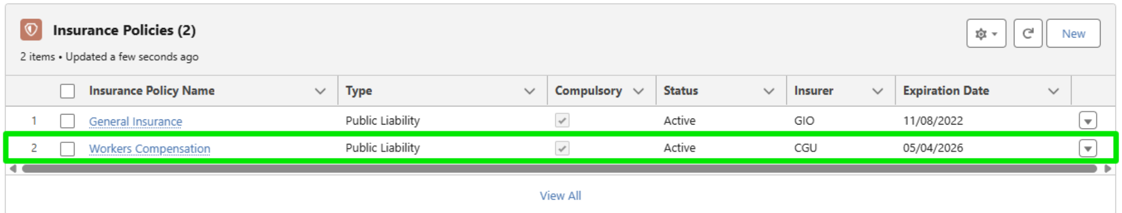


The **New Insurance Policy** dialog box appears.

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



4. The new policy is now added to the list.



> 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

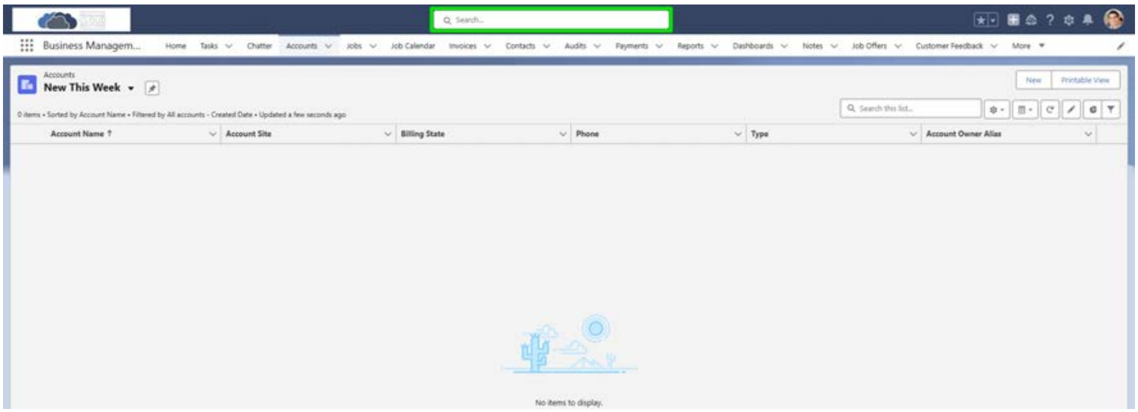
How to search for information

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.

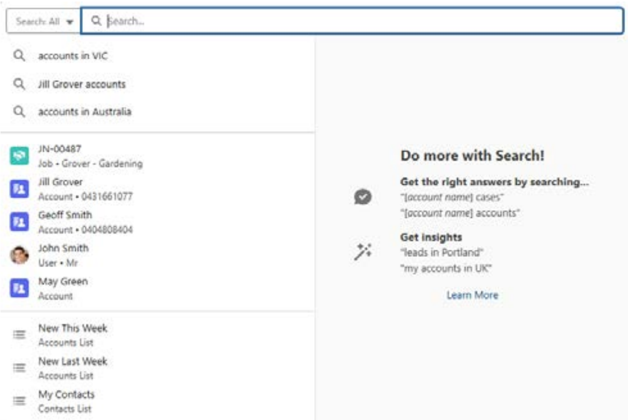
> Let’s say someone contacts you on the phone. You can use the search to see if they are an existing customer.

How to search for information

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

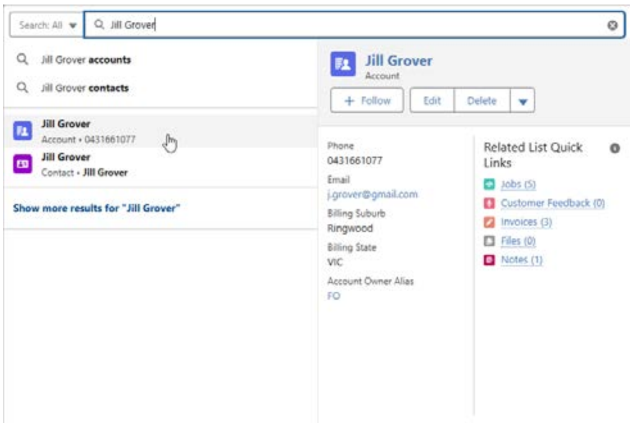


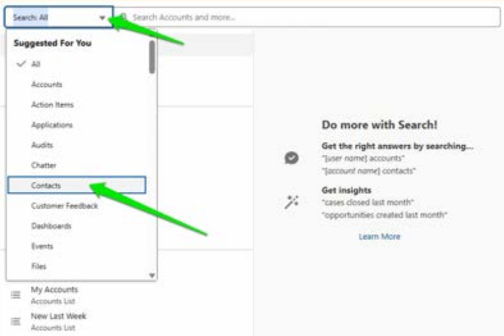
2. Click the **Search** box and you will see suggestions for searches along with recently viewed objects.



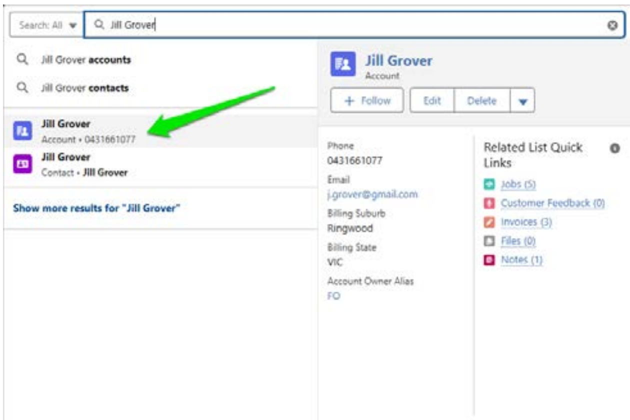
> Access the search box by using the "/" keyboard shortcut.

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.



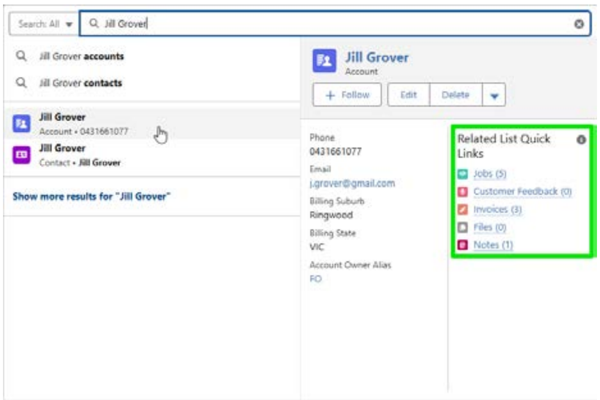
> To narrow your search results to a specific object (e.g., Account, Contact), select the object from the dropdown menu located next to the search box.
>
> 
>

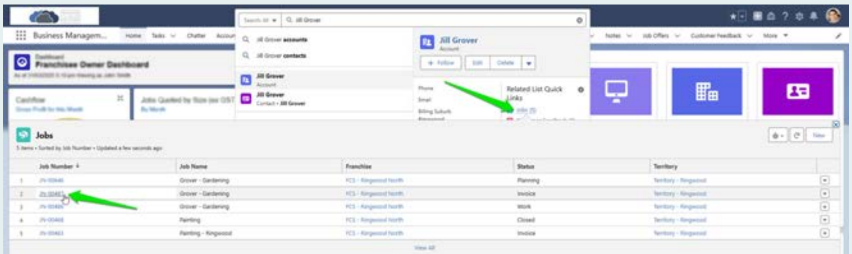
4. If you have located the desired record, click on it to view its page.



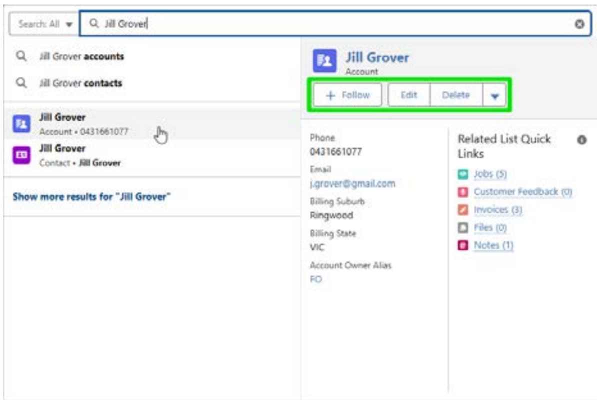
5. After finding the record, you can perform actions directly from the search box.

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



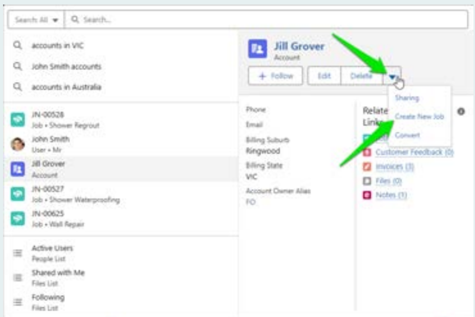
> ✔ **Access a list of Jobs from the search box**
>
> After entering the customer's name, you can view a list of Jobs on their Account. To open a specific job, move your mouse over the **Jobs Related List Quick Link** and select the desired job from the list.
>
> 

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

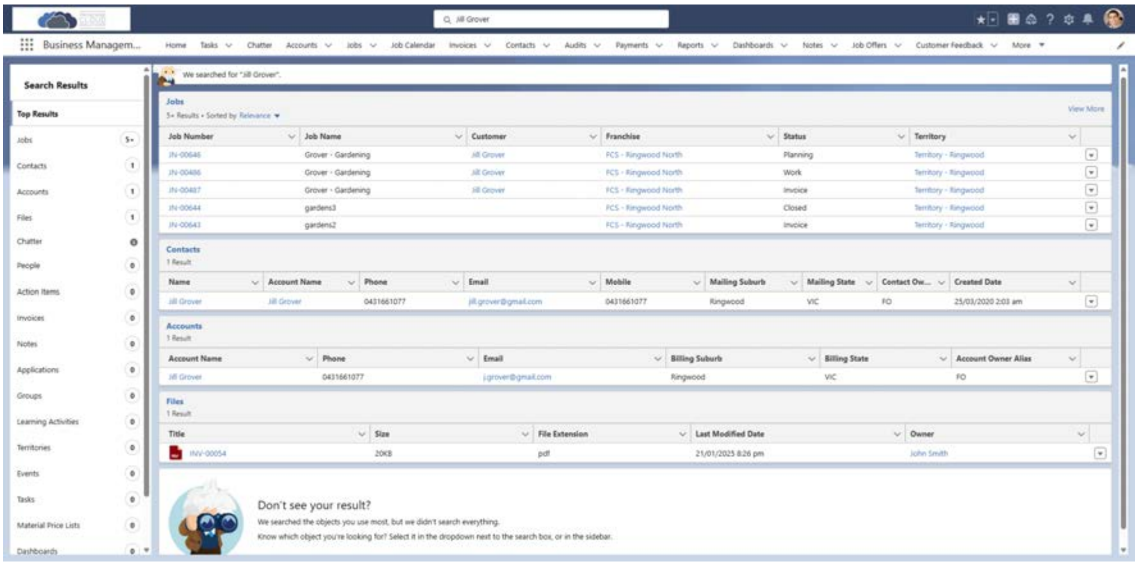


Create a new Job from the search box

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.

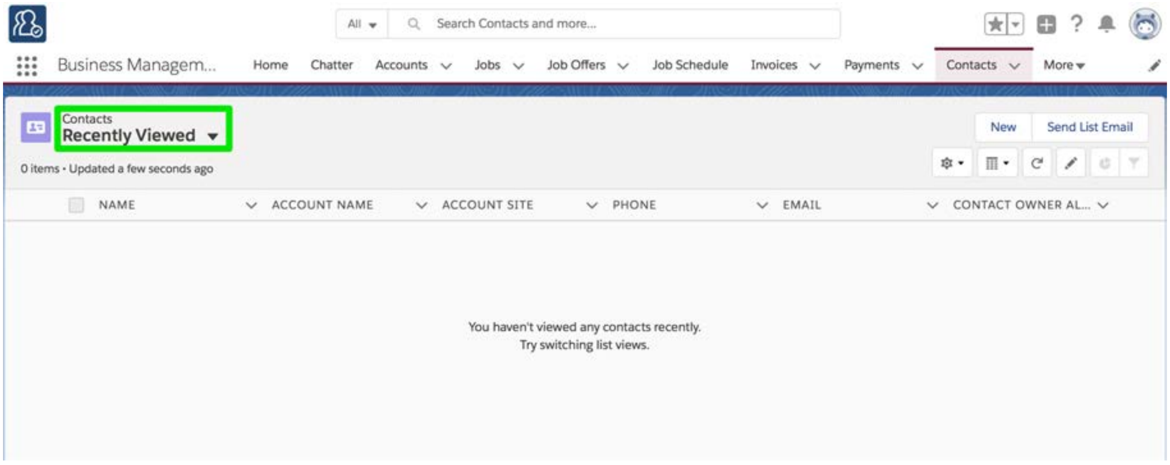


How to browse records using List Views

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.

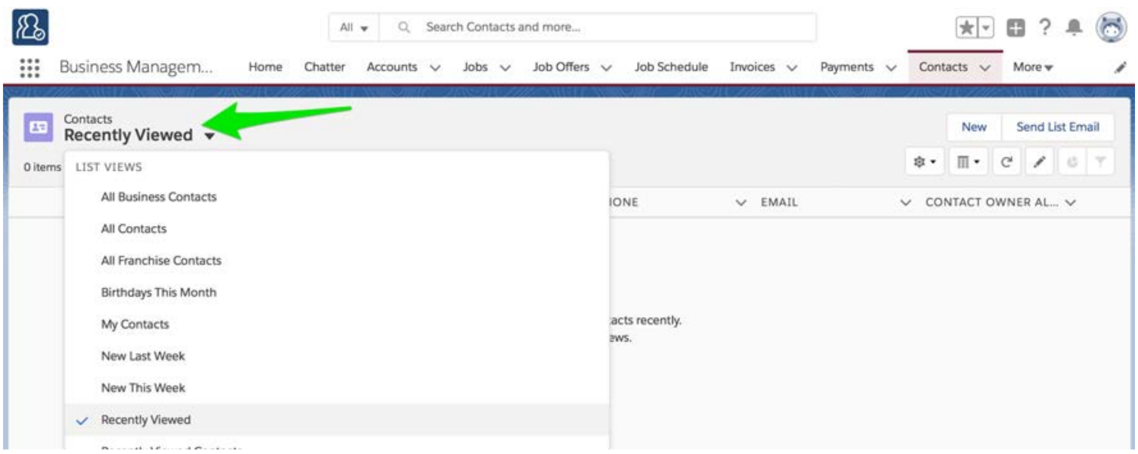
When you first open a menu, the first List View you see is likely to show you an empty list. Salesforce is showing you things you have viewed recently. This is known as the **Recently Viewed** List View.



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

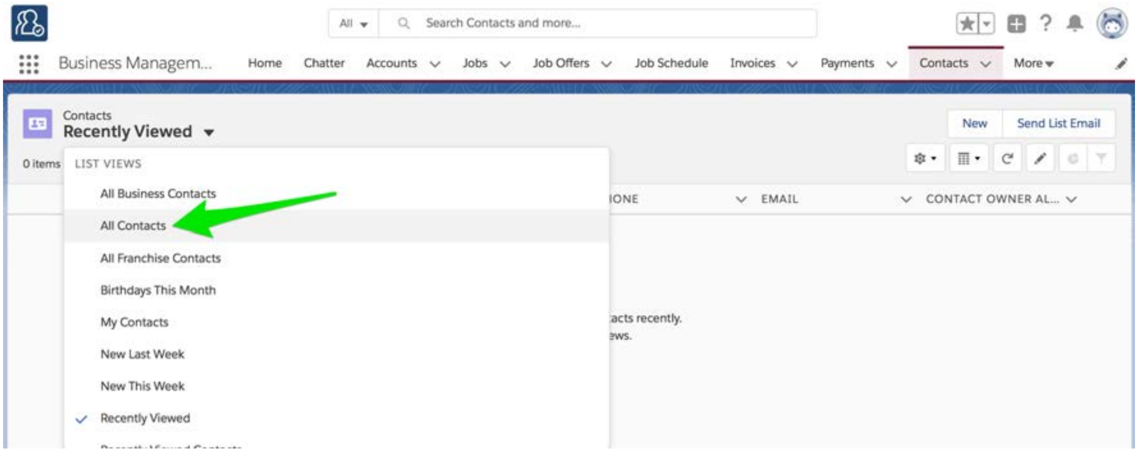
To see some data

1. Click on **Recently Viewed**.



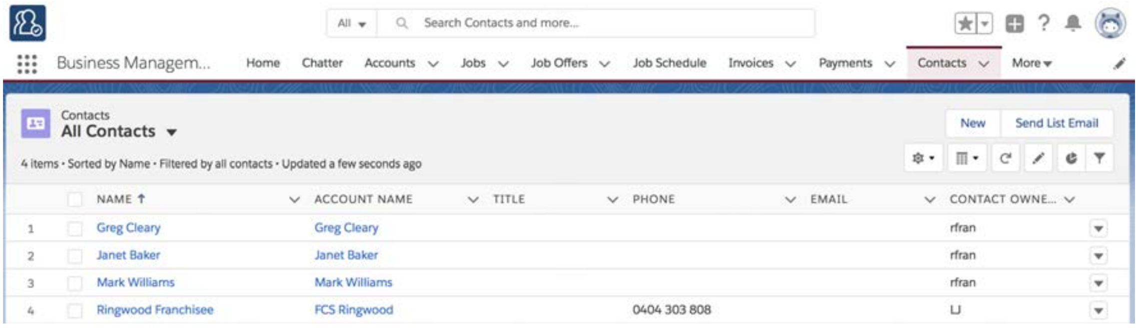
“Recently Viewed” is the name of a list that shows items you have viewed recently. Now that you have clicked on it, you can see the names of other lists.

2. Click on any list containing the word "All."

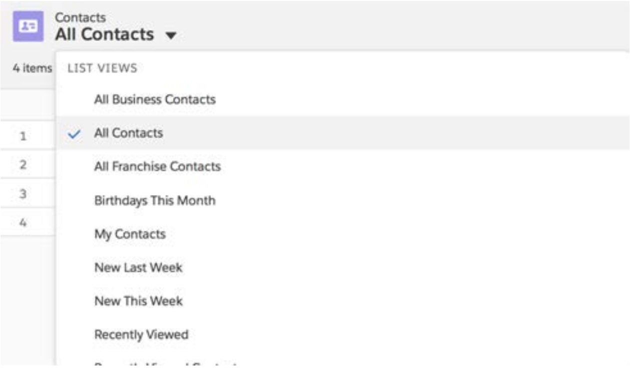


If there is data in your system, this list is likely to show it.

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

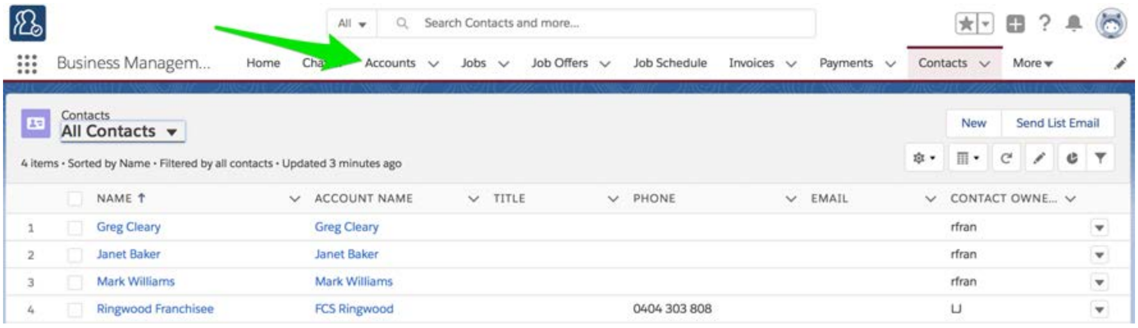


4. Now re-open the list view and notice the different types of views.



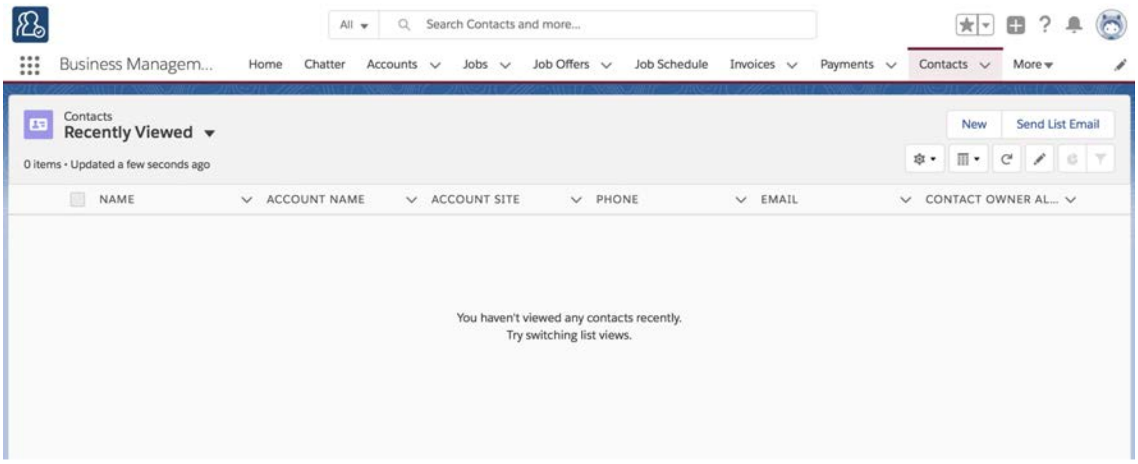
Each list potentially contains a different subset of records. Salesforce uses list views to make the amount of data you can see manageable.

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.

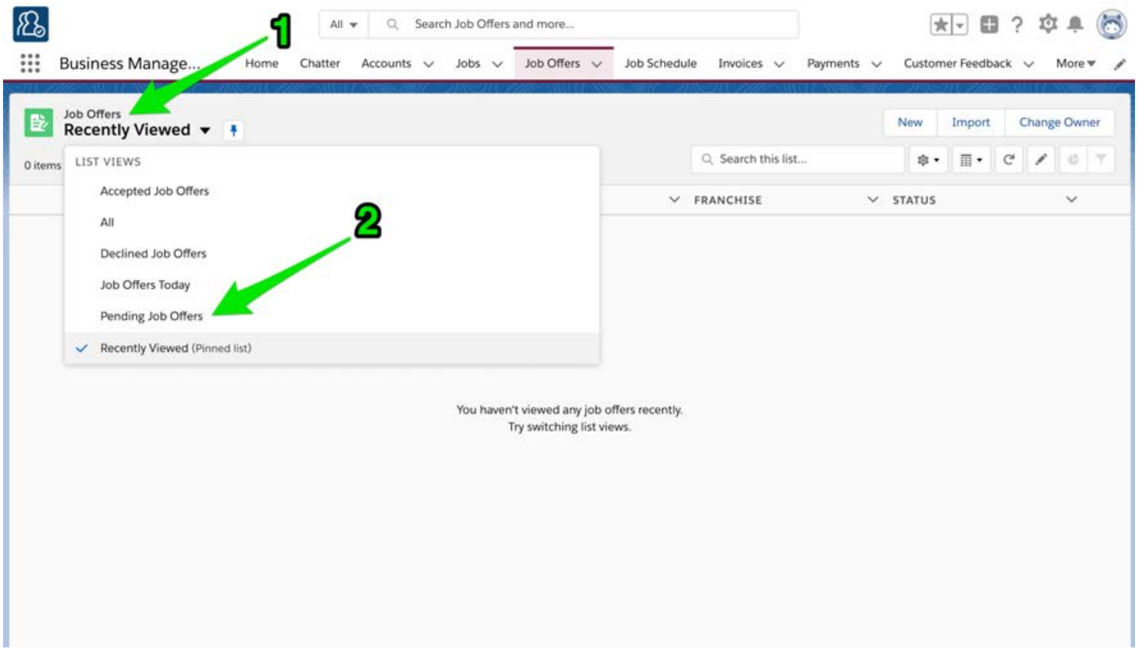
How to set a default list view

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.

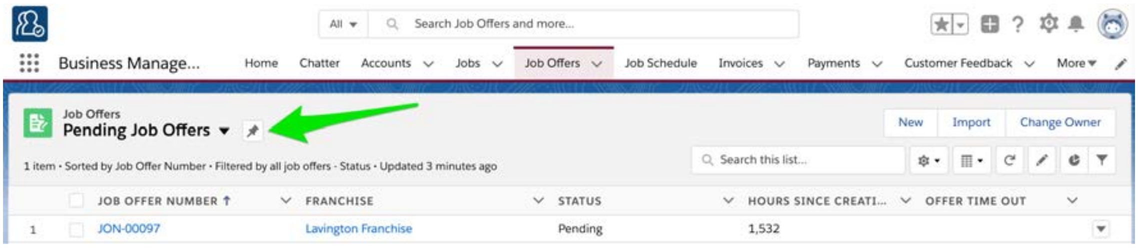
> When you select the Job Offers tab, the only job offers you see on the Recently Viewed list are the ones you have already visited. Most times you go to the Job Offers tab, what you are really wanting to see are the new job offers.
>
> By following the procedure below, you will be able to set the Job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

To set a default list view

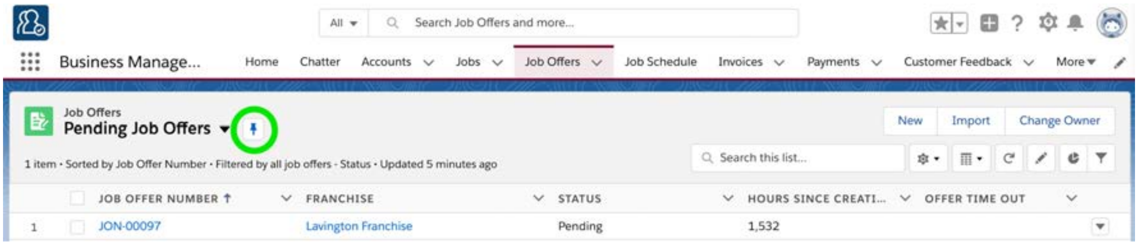
1. Open the List View control and select the List View you want as the initial view.



2. Press the pin.



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



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

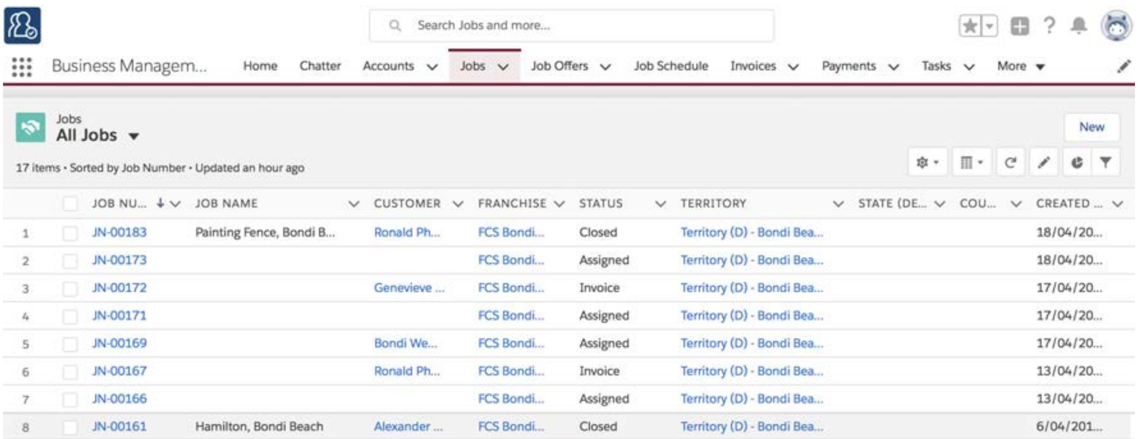
How to customize a list view

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.

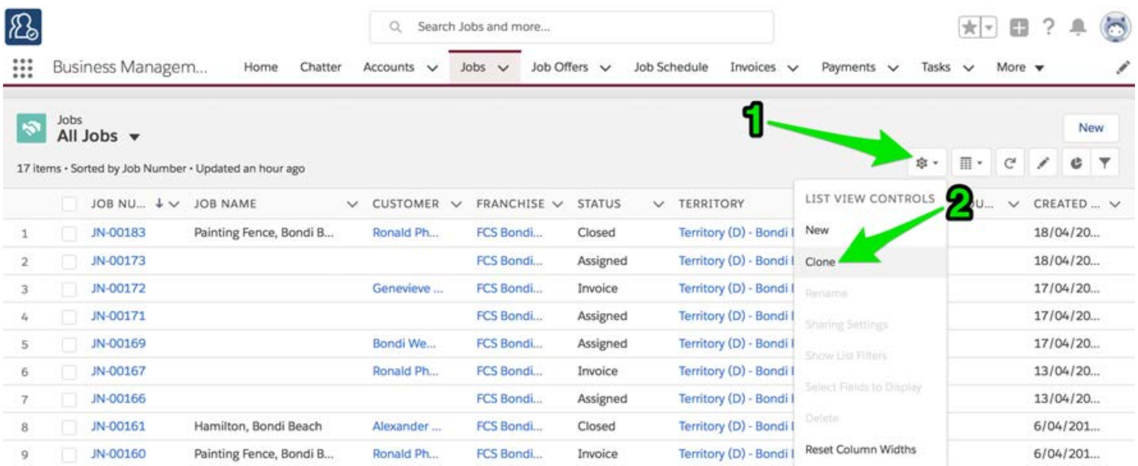
> Imagine you want to see the list of jobs where payments are owed to you. You could create a list view to show **Jobs with Balance Owing**.

To modify an existing list view

1. Select the list view you want to copy.

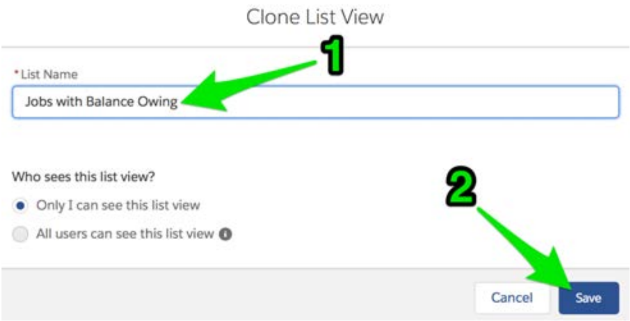


2. Open the **List View Control** and choose **Clone**.



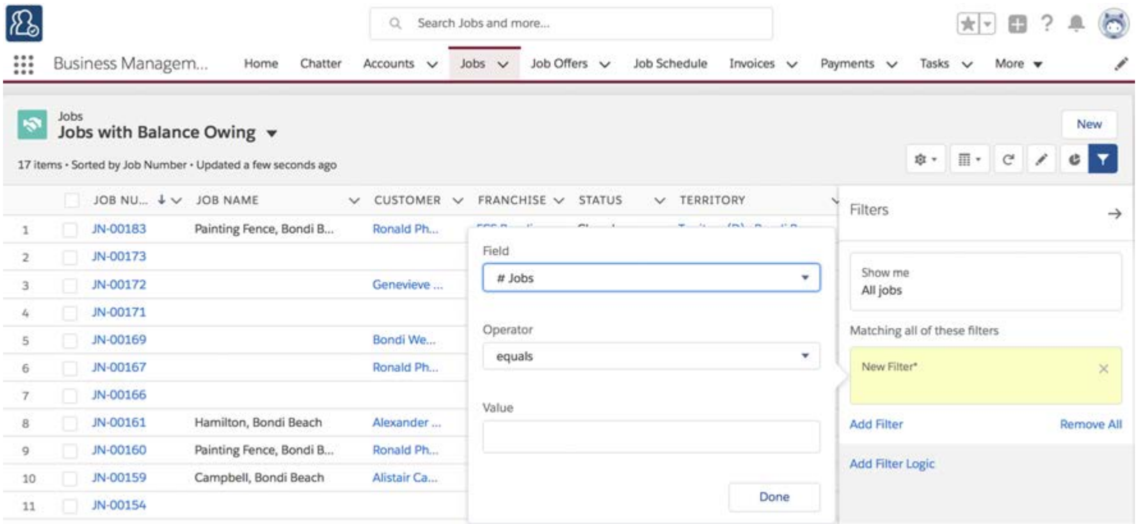
The **Clone List View** dialog box appears.

3. Enter the new `List Name` and press **Save**.

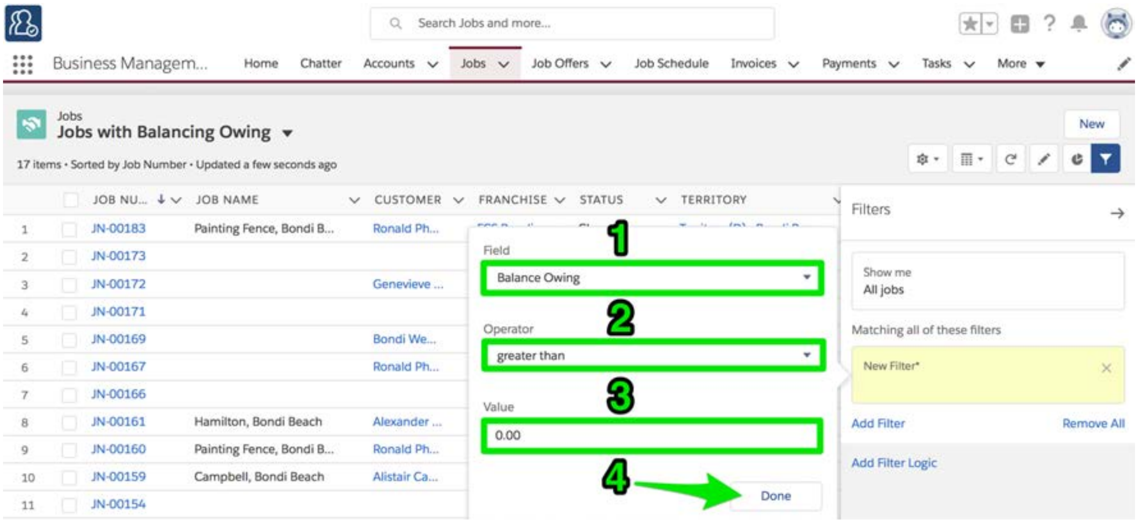


The newly named list view appears together with its filter pane.

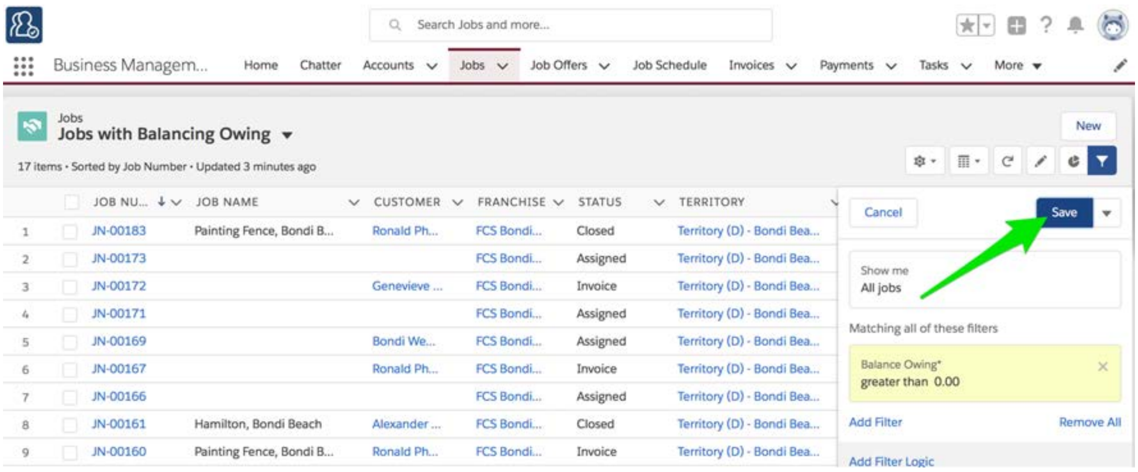
4. Choose the **Add Filter** link to add an extra filter condition.



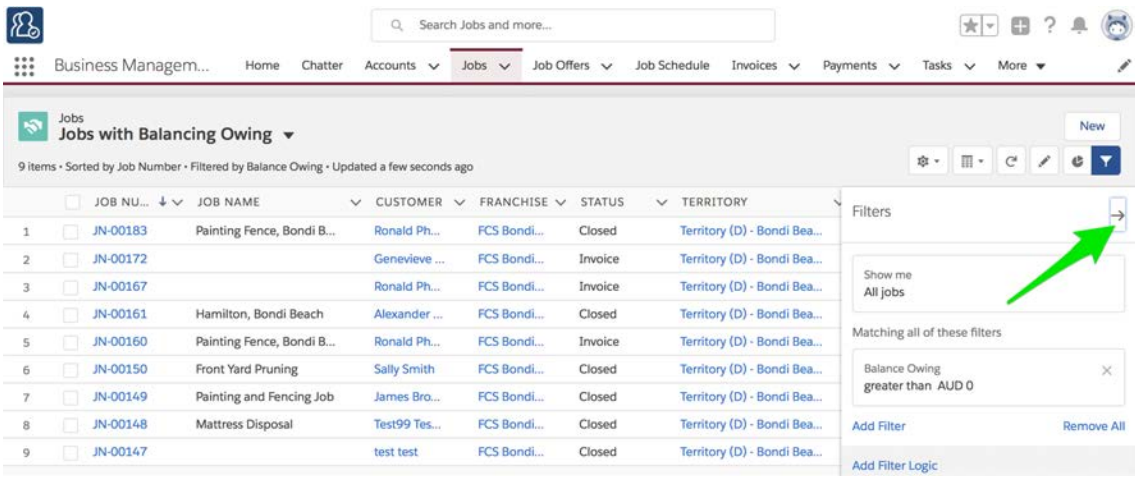
5. Use the `Field`, `Operator` and `Value` fields to set the new condition, then press **Done**.



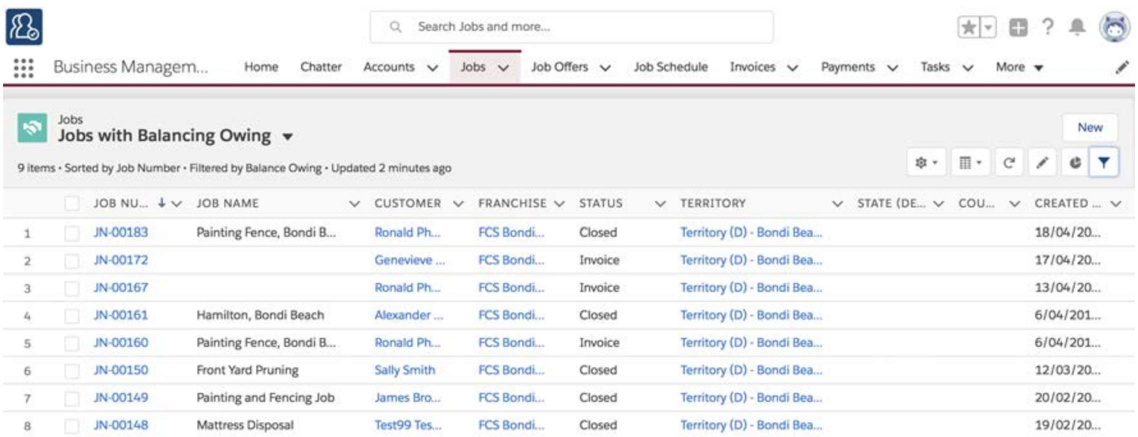
6. Now press **Save**.



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



Now you can see your newly modified list view.



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

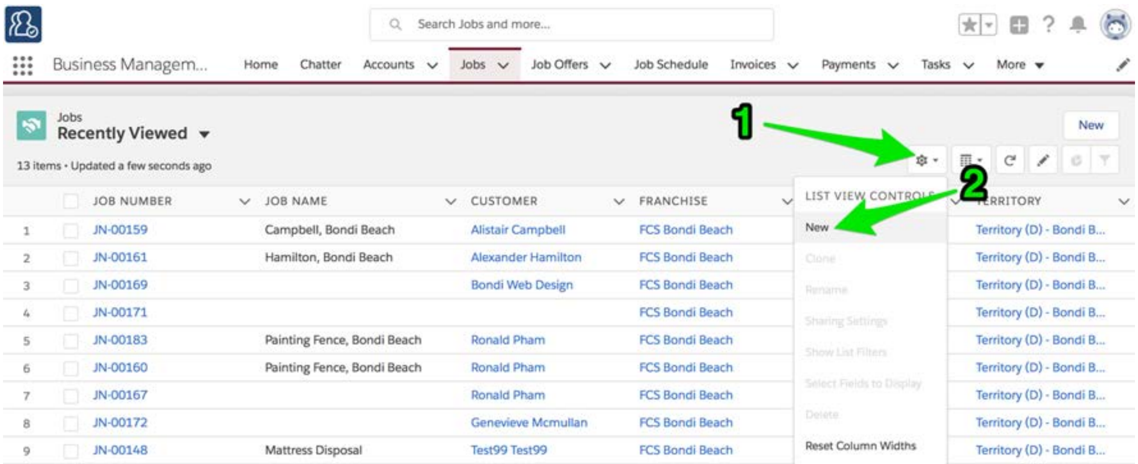
How to create your own list view

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

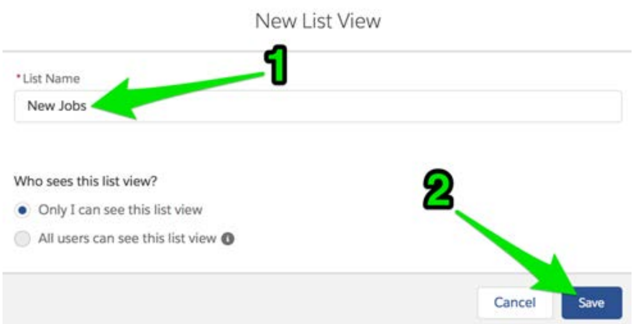
> In this example, we're going to create a list view to show us jobs that have been assigned to us that we have not yet contacted.

To create a new list view

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

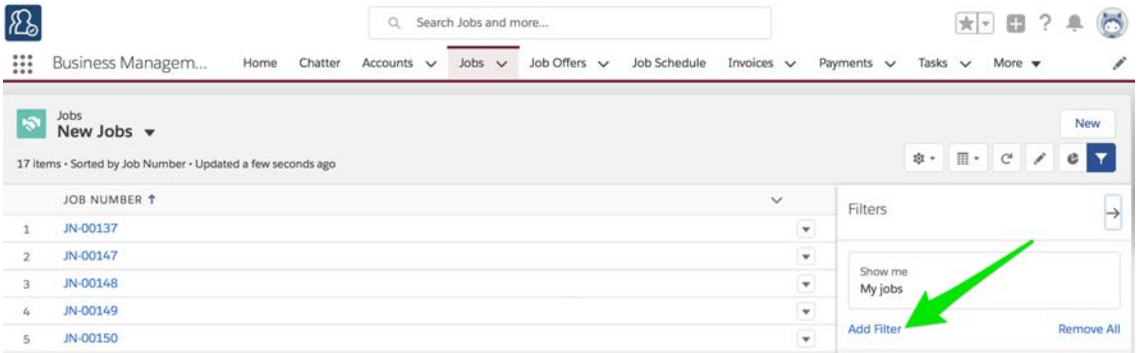


2. Enter the new `List Name` and press **Save**.

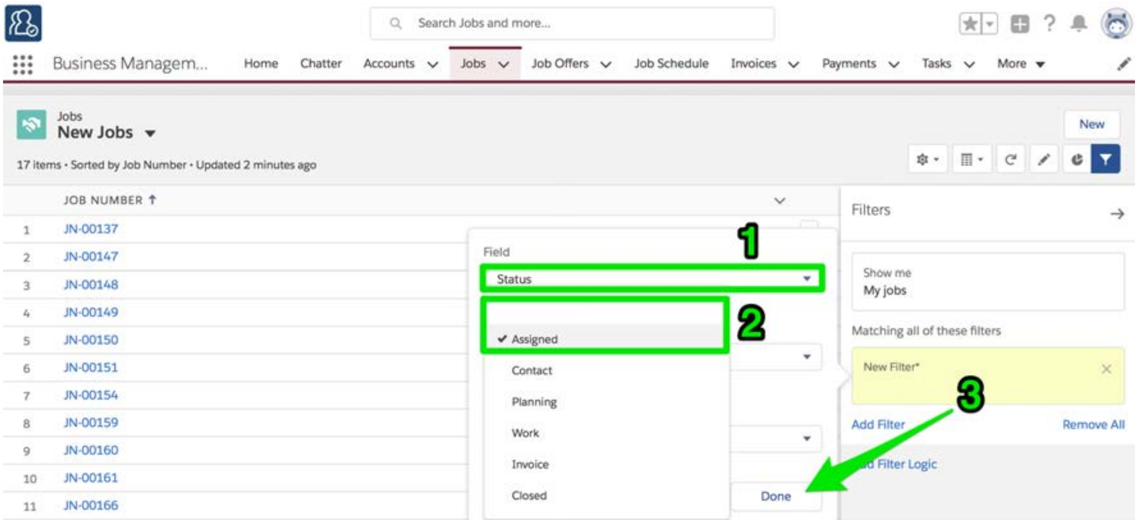


The newly named list view appears together with its filter pane.

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

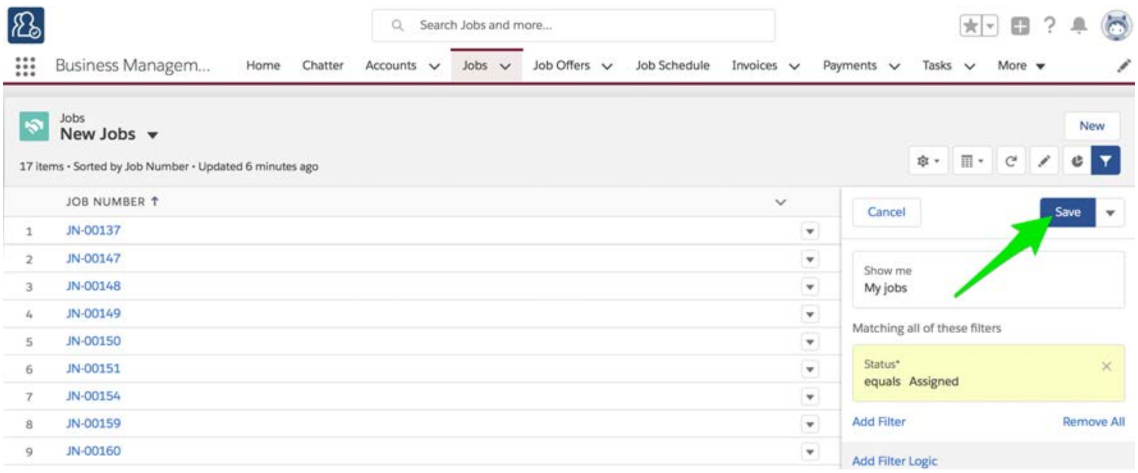


4. Use the `Field`, `Operator` and `Value` fields to set the new condition, then press **Done**.

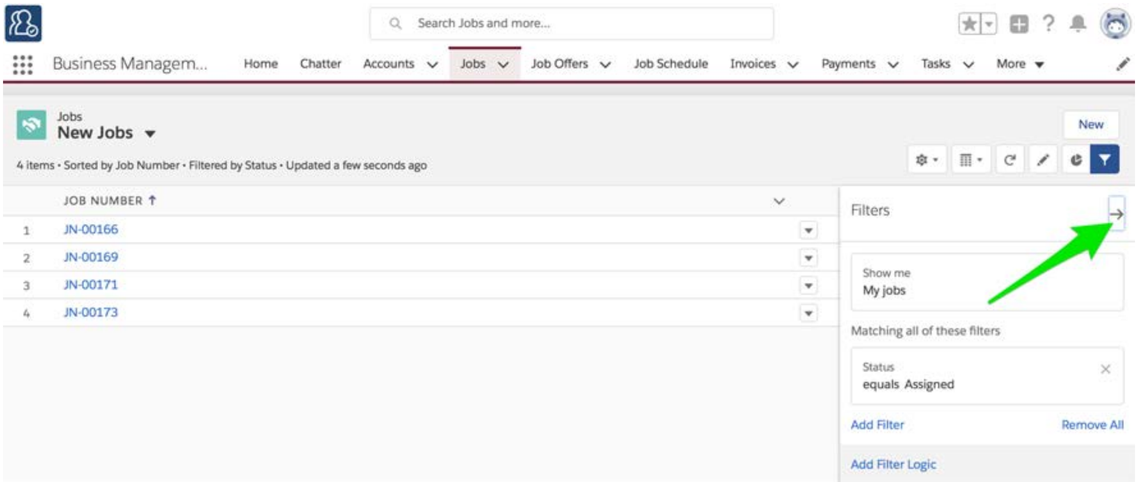


In the above image `Operator` is set to *equals*.

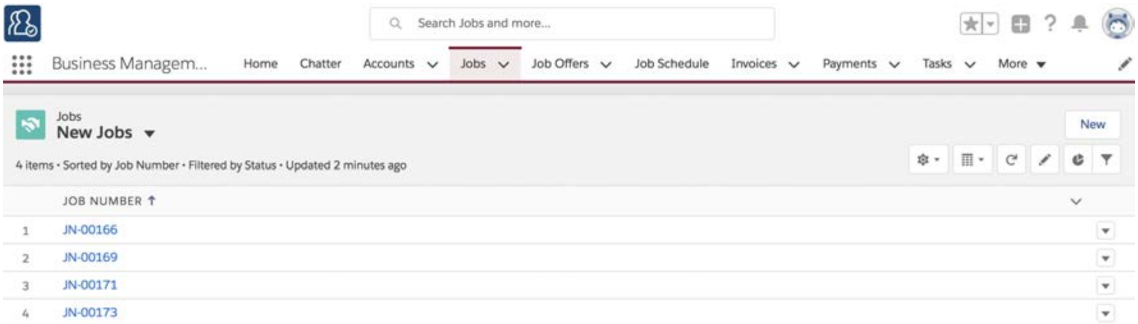
5. Press **Save**.



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



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



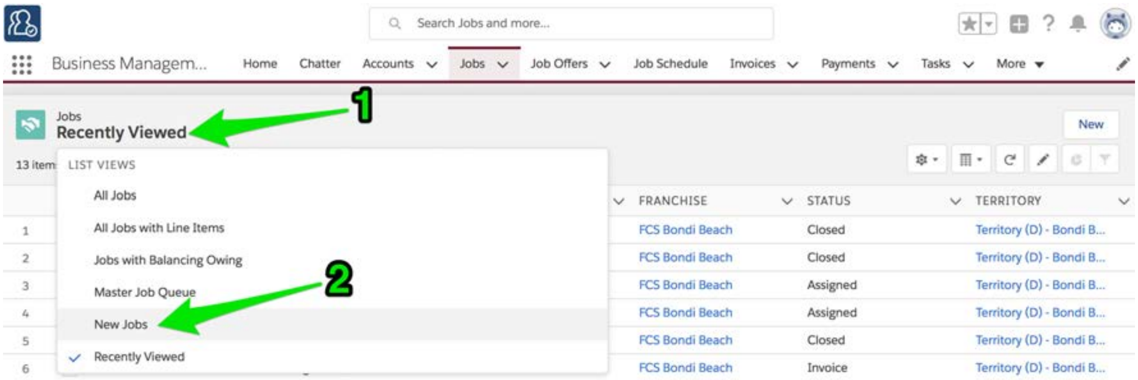
To make this list view more useful, add some extra columns to it. *See* “How to add columns to a list view” on the facing page.

How to add columns to a list view

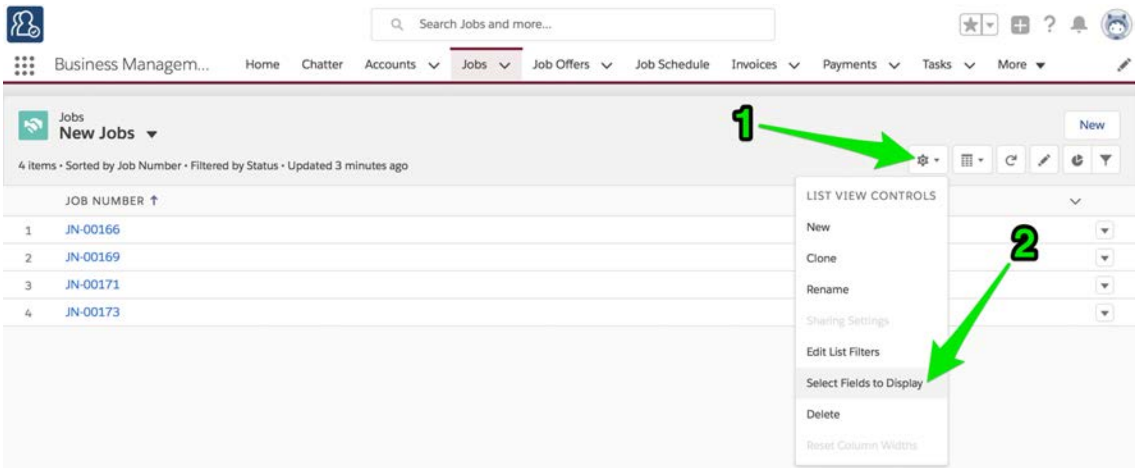
You can add columns to any custom list view.

To add columns to a custom list view

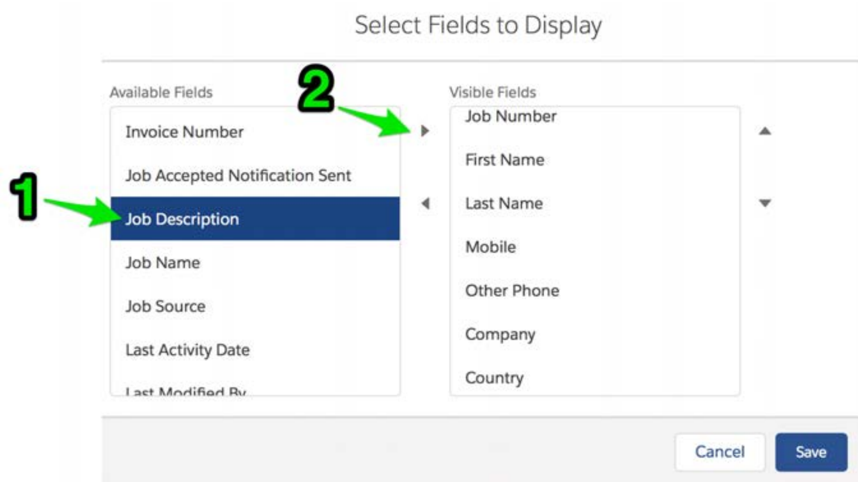
1. From **Recently Viewed**, select a custom list.



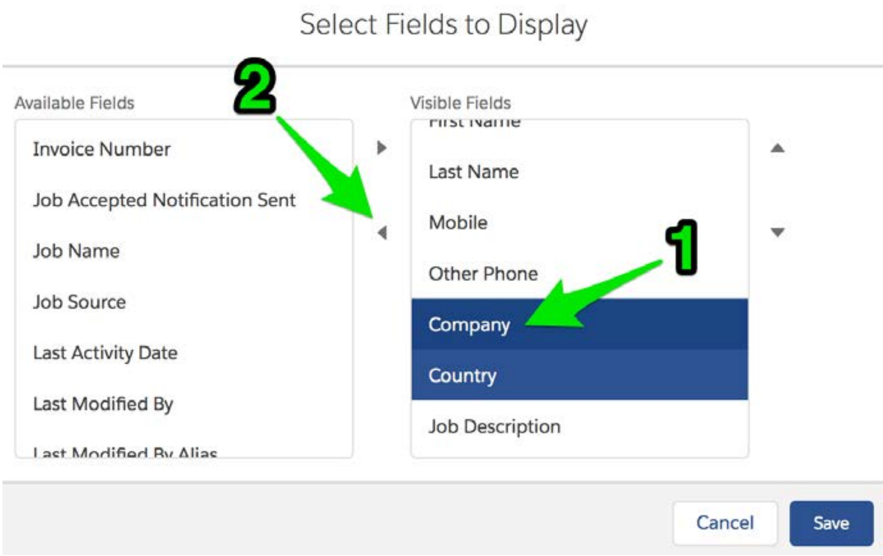
2. Open the **List View Control** and choose **Select Fields to Display**.



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

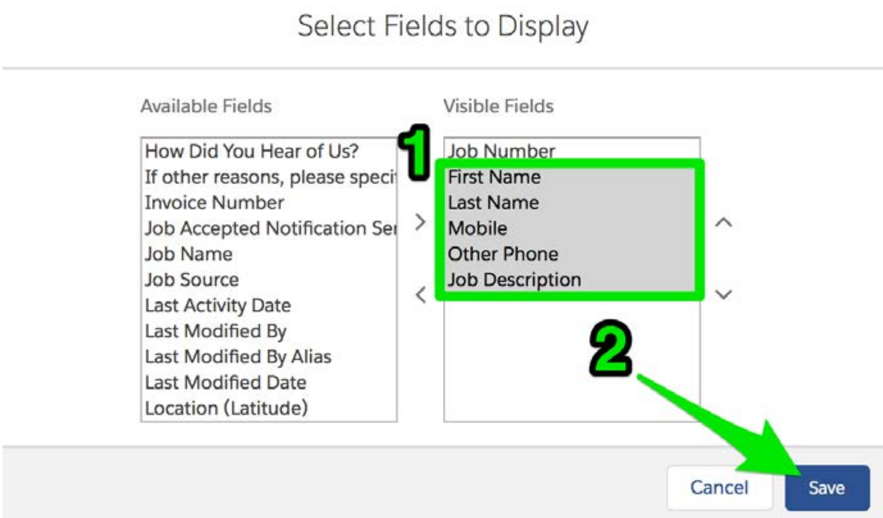


4. Now remove any fields you want not to display.

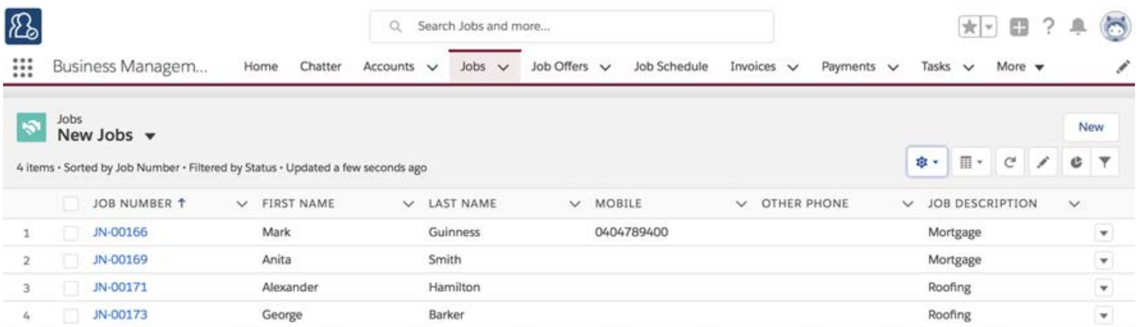


5. Sort the fields into the order you want to see.

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



Now you can see the updated list.

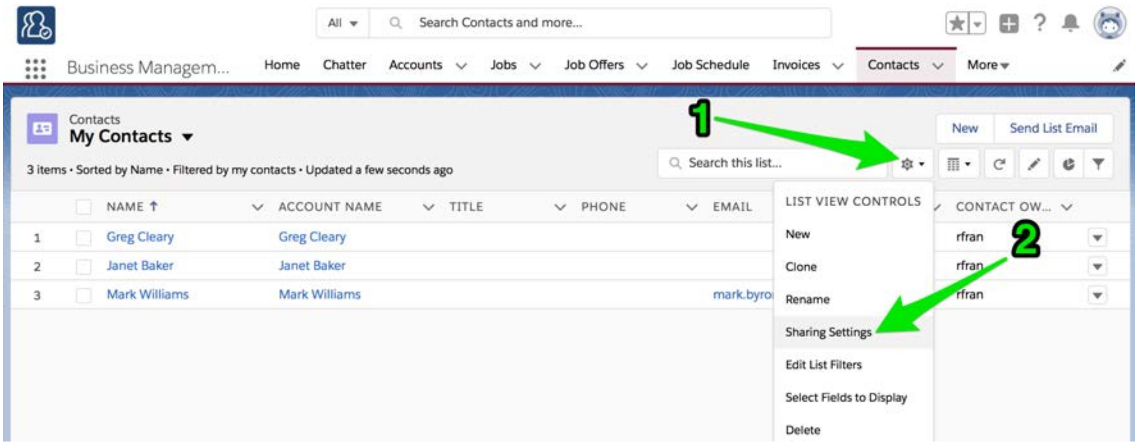


How to share list views

You can share your list views with your colleagues.

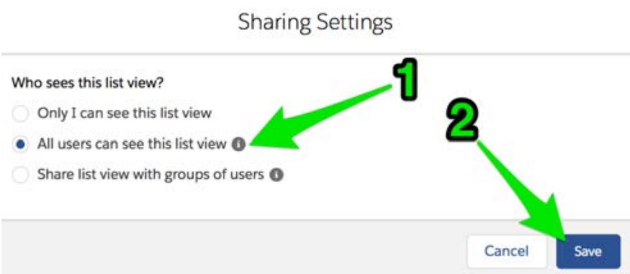
To share a list view

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

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.

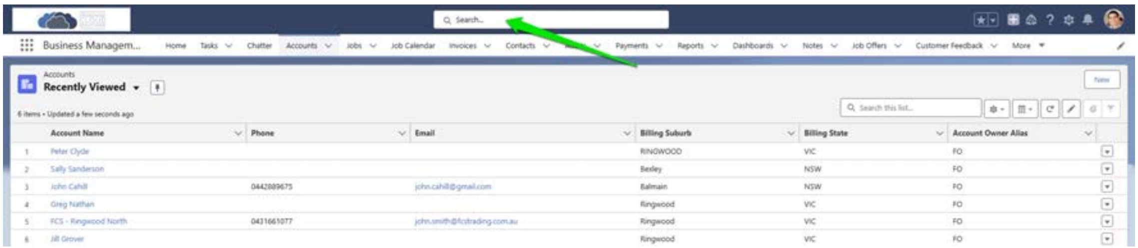
When a customer contacts you

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.

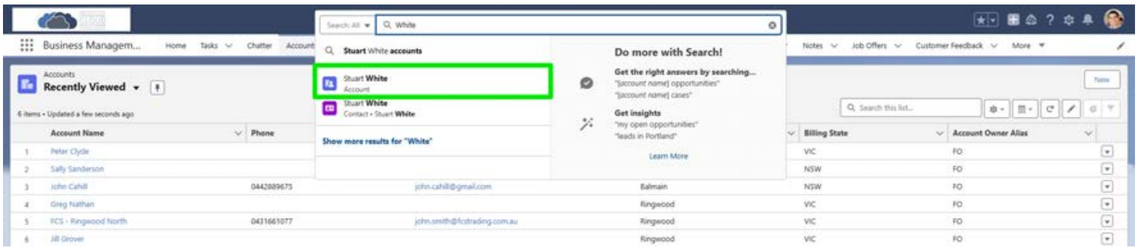
> Part of demonstrating the value of your customer base is showing how many of them are repeat customers, so you want to avoid creating duplicate accounts if you can at all help it.

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.



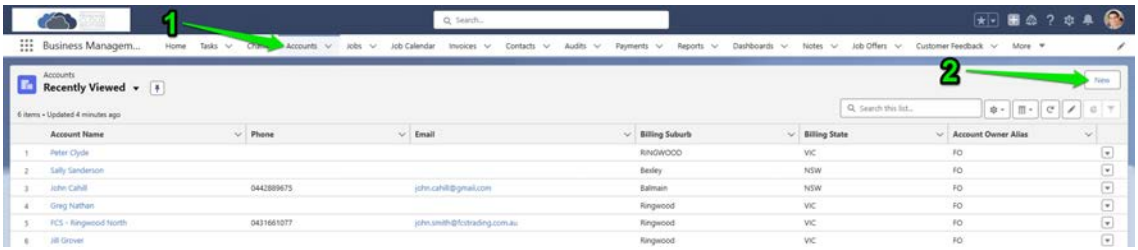
2. If any of the search results match the person or business that you are searching for then you can select and use this account.
3. If you cannot find the person or business you are searching for, you will want to create a new account.

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.

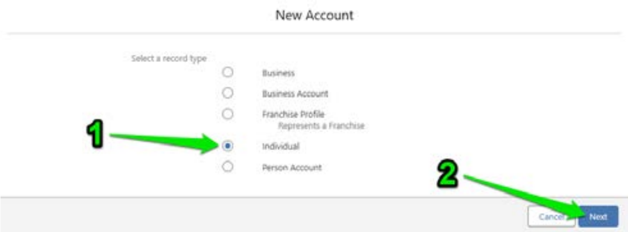
To create an individual account

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



   The **New Account** dialog box appears.

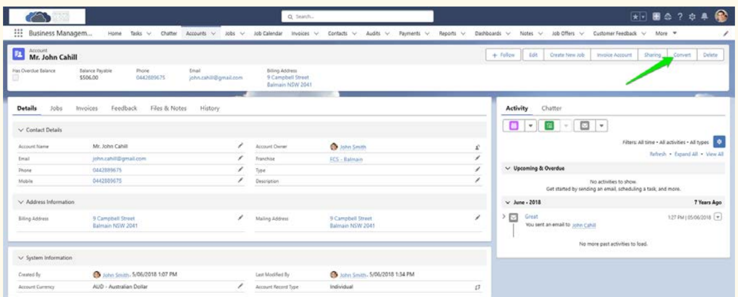
2. Choose `Individual` then press **Next**.



   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.



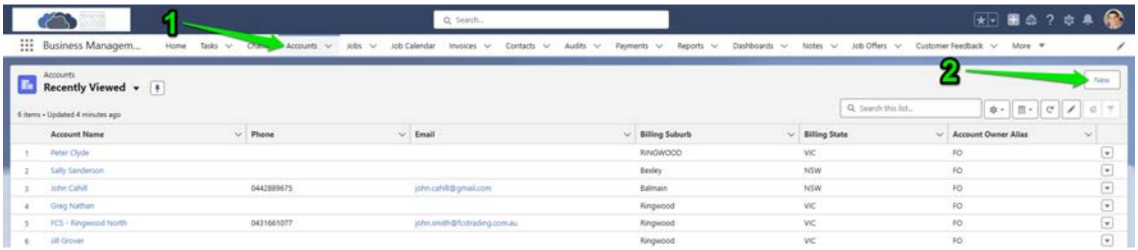
How to create an account for a business

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.

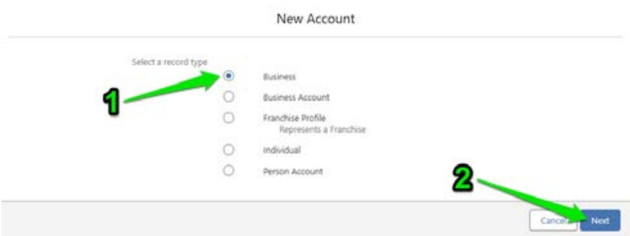
To create a business account

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

   The **New Account** dialog box appears.

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

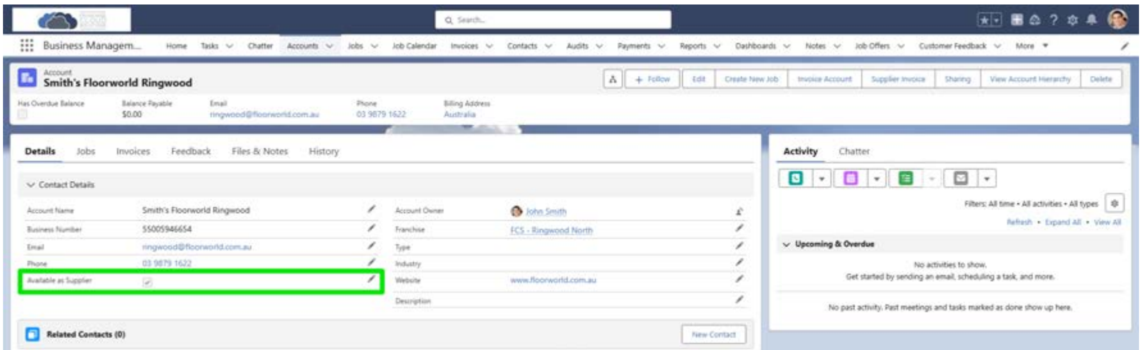
   The **New Account: Business** dialog box appears.

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

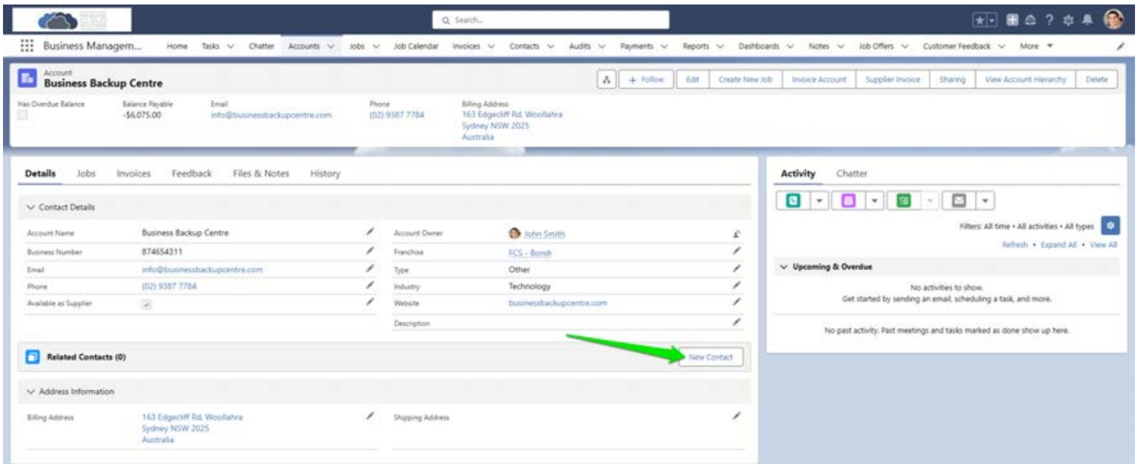
» Check the `Available as Supplier` check box.



How to add a contact to a business account

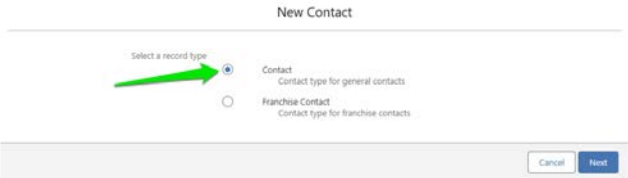
To add a contact to a business account

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



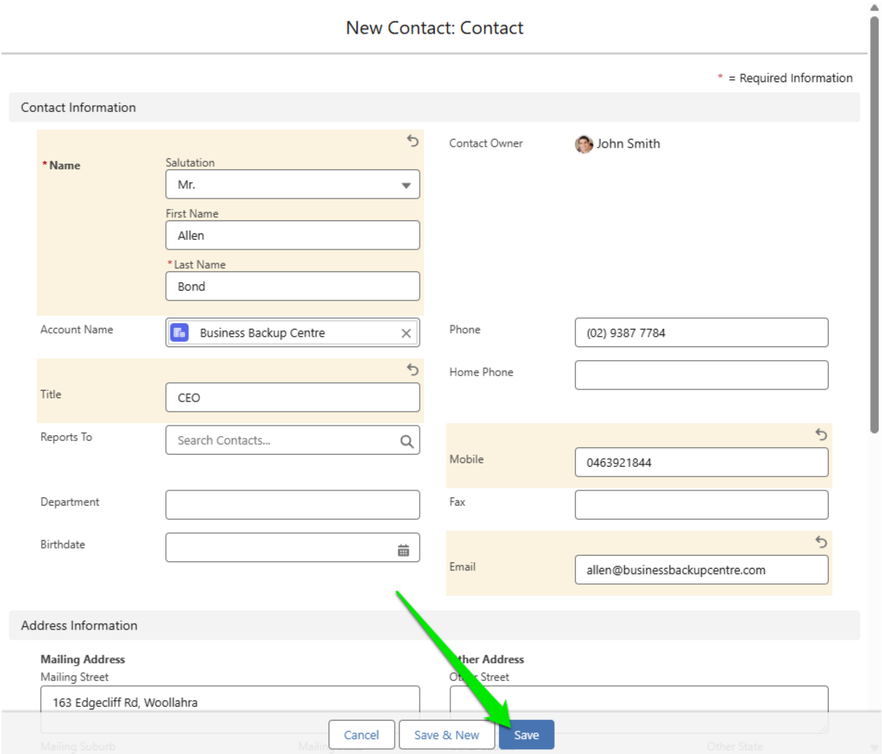
   The **New Contact** dialog box appears.

2. Choose `Contact` then press **Next**.



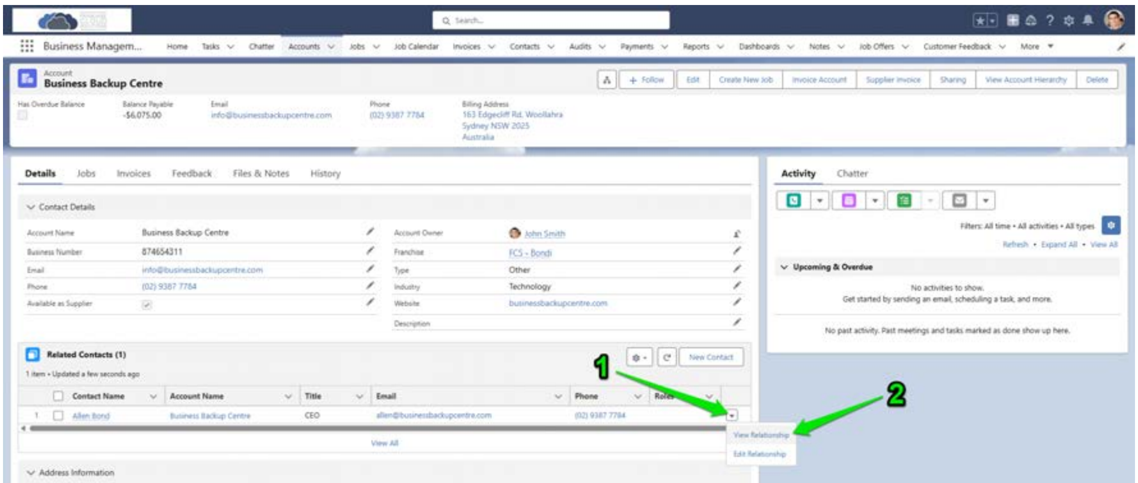
   The **New Contact: Contact** dialog box appears.

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**.



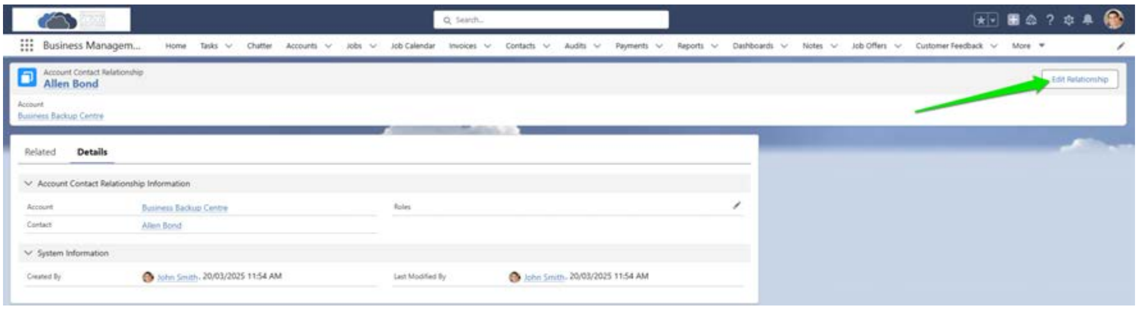
> When you have more than one contact, it is often useful to define the relationship. That way you can tell who is the billing contact and who is the job contact.

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



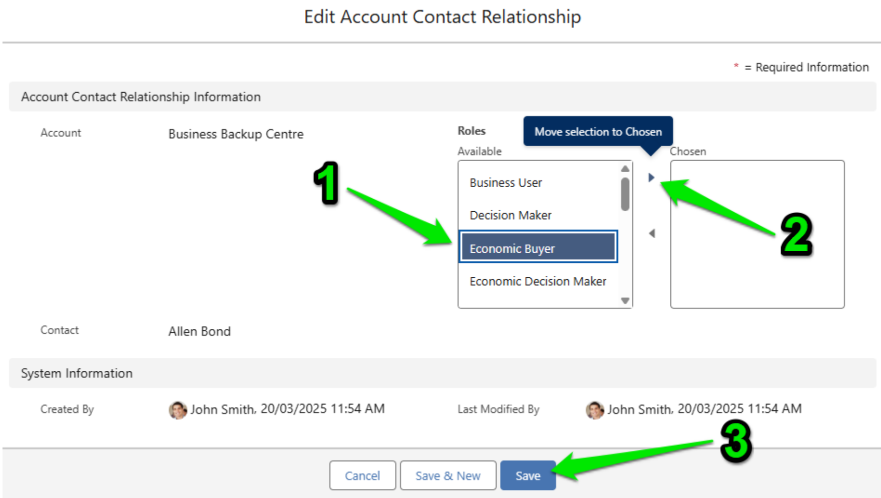
The **Account Contact Relationship** page appears.

5. Press **Edit Relationship**.



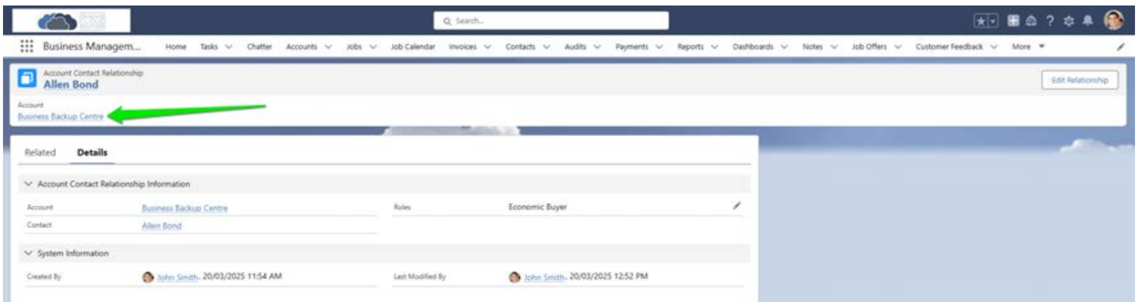
The **Edit Account Contact Relationship** dialog box appears.

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.

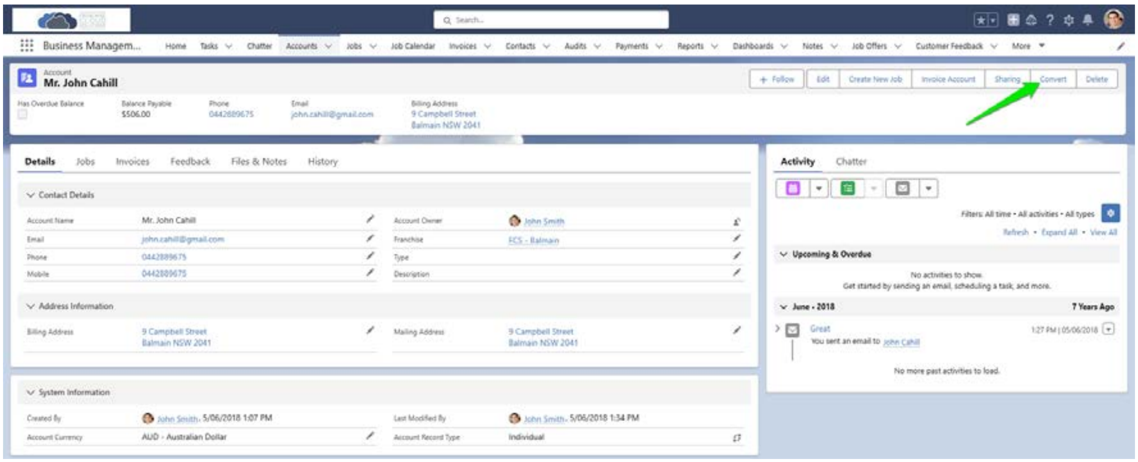


How to convert an individual account into a business account

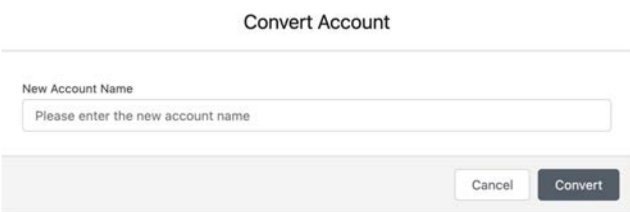
While it is quicker to create an individual account, in the end business accounts can be more flexible. If you have created an individual account that in retrospect you would now like to be a business account, it is possible to convert it.

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**.



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

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.

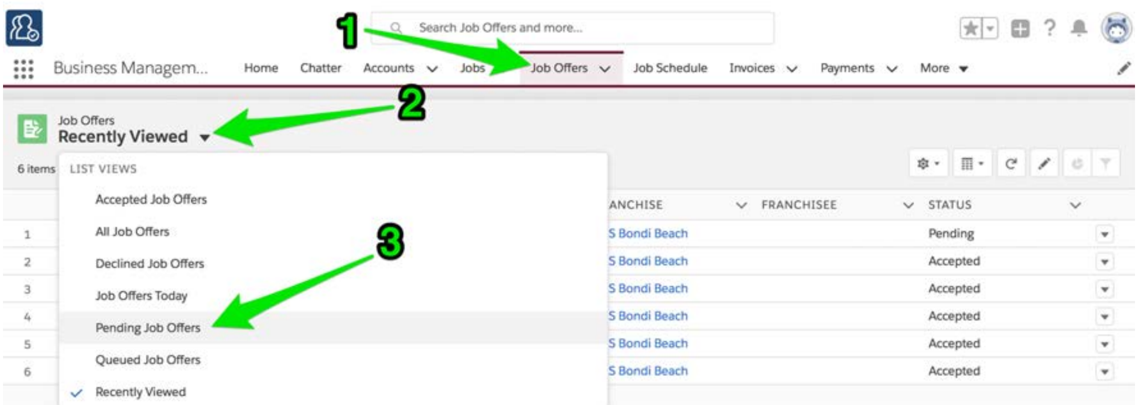
In most cases, you need to accept the offer within the job offer time-frame in order for the job to be allocated to your business. If you decline or ignore the job offer, the job is usually offered to the next-best placed franchise.

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.

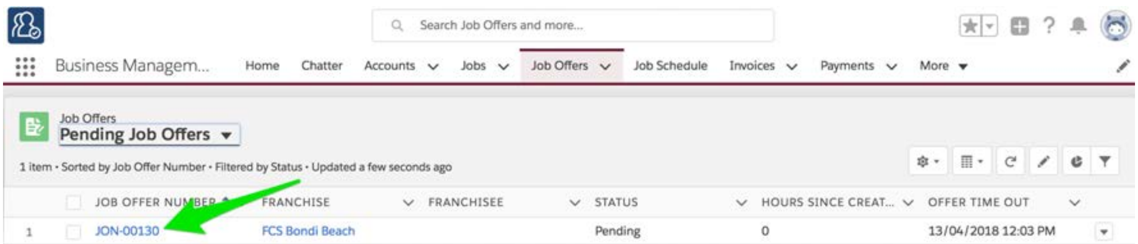
To accept a Job Offer within Salesforce

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

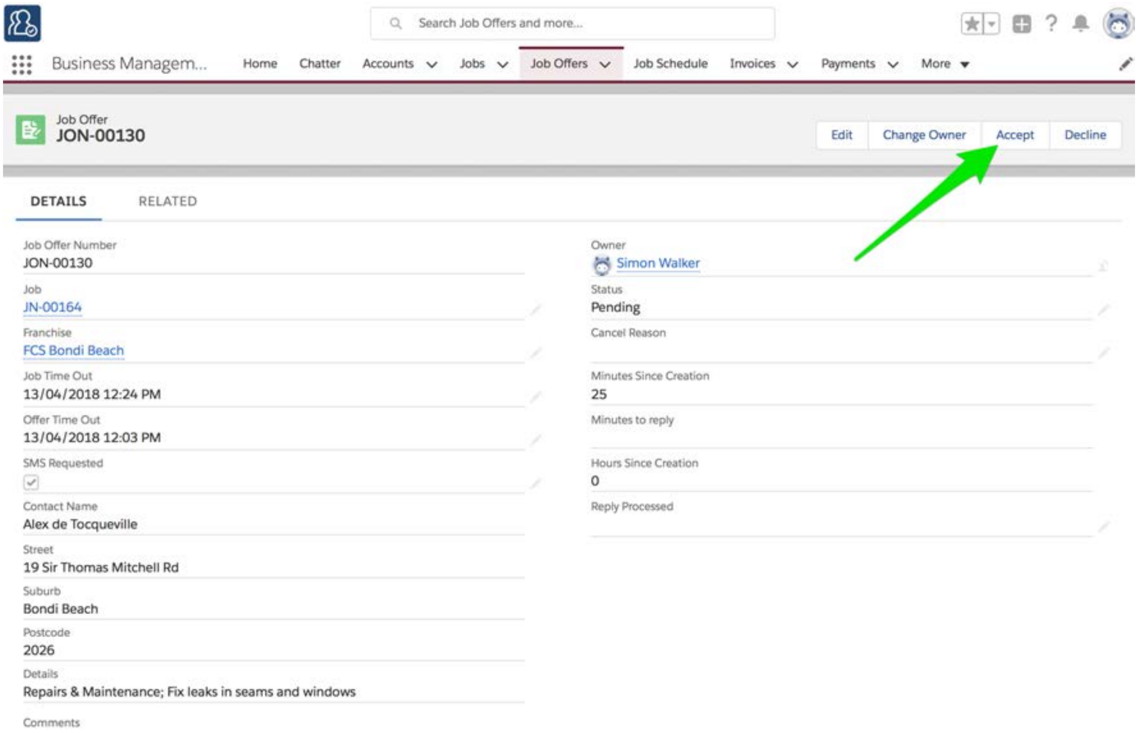


   You can see the job offers currently available to your franchise.

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

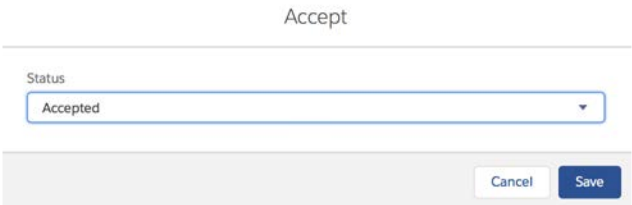


3. Review the job details. When you are satisfied that you want to accept this job, press **Accept**.



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

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

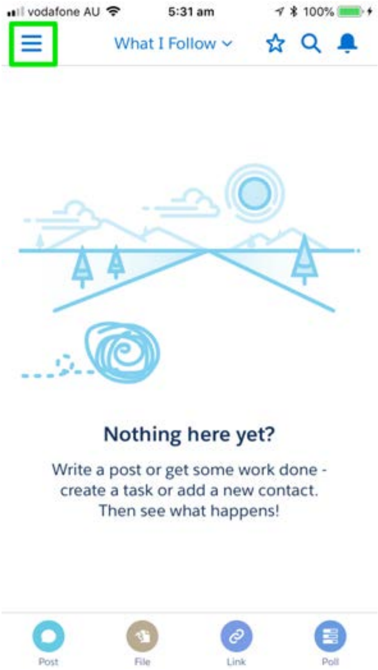
The Job is now ready for you to begin working. *See* "Working with Jobs" on page cii.

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.

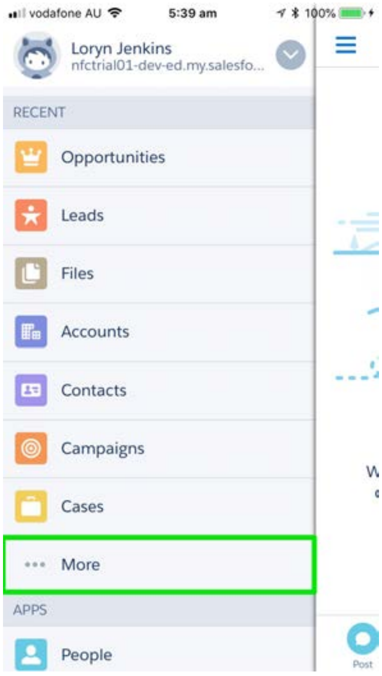
To respond to a Job Offer in Salesforce Mobile

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

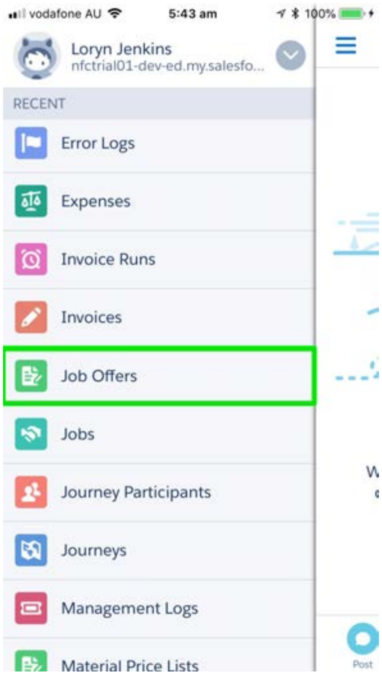


The Salesforce menu opens.

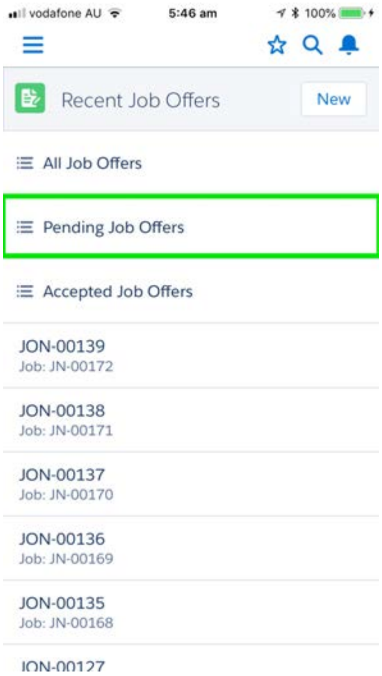
2. Scroll down to **Recent** and press **More**.



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

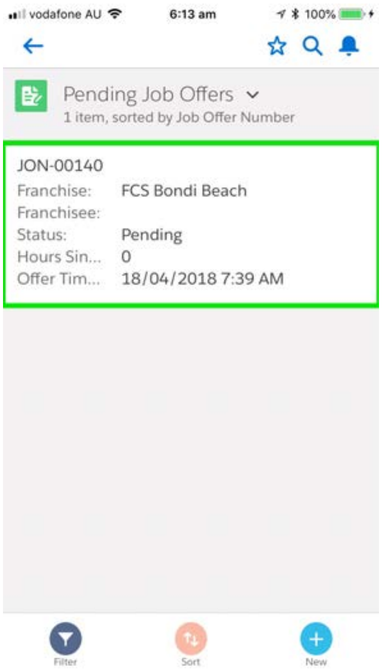


4. From the **Job Offers** page, select the **Pending Job Offers** list view.



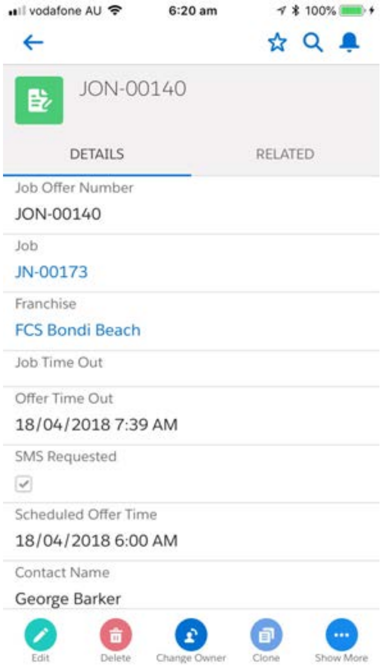
The list of currently available job offers displays.

5. Select a **Job Offer**.

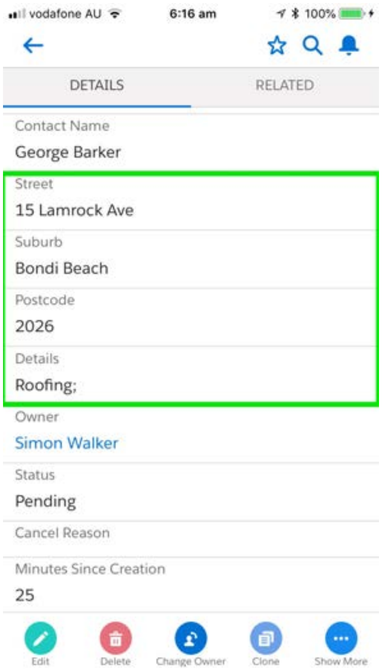


The **Job Offer** opens.

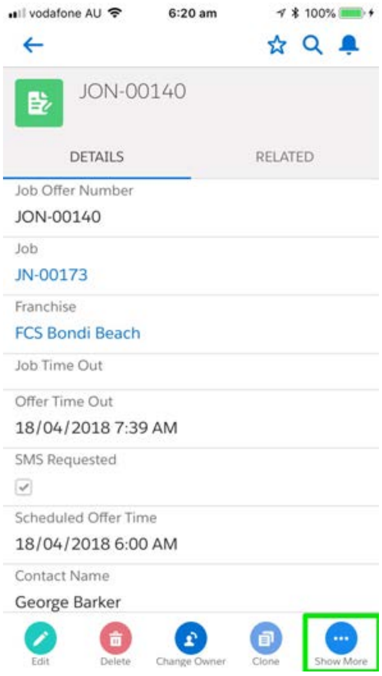
6. You have a Job Offer open in the mobile Salesforce app.



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

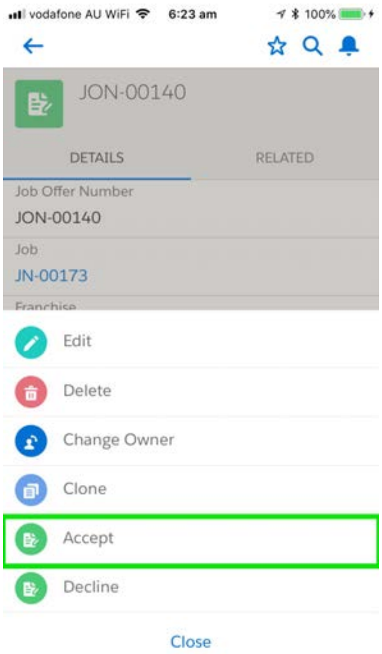


8. When you want to accept the job offer, press **Show more**.



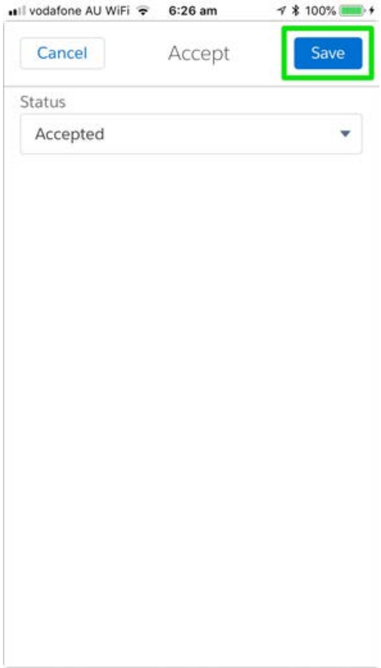
The **Show more** menu displays.

9. Press **Accept**.



The **Accept** dialog box opens.

10. Press **Save**.



You have now accepted the Job Offer.

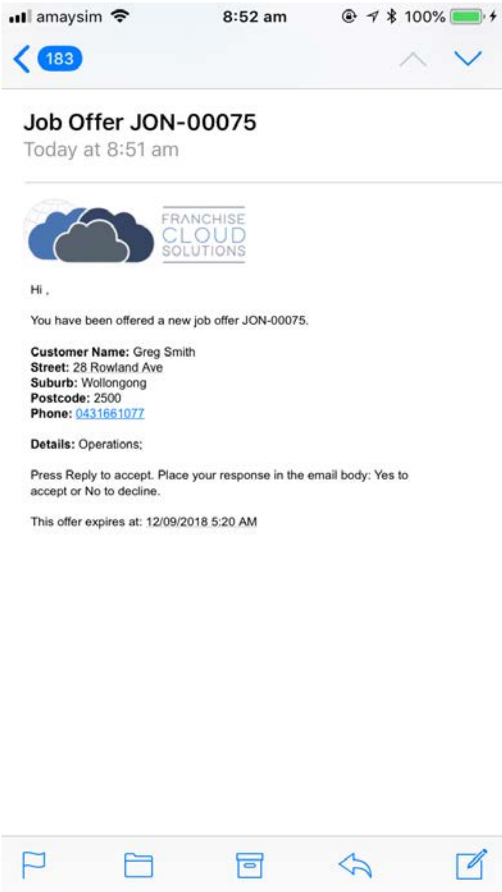
> The Job is now ready for you to begin working. *See* “Working with Jobs” on page cii.

How to respond to job offers by email

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

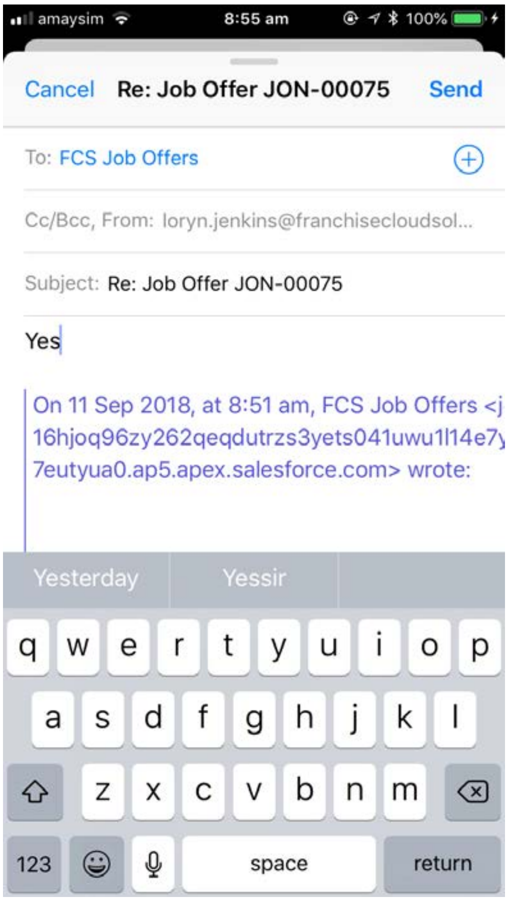
To respond to job offers by email

1. Open the email containing the job offer.



2. Review the location and job details.

3. 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.

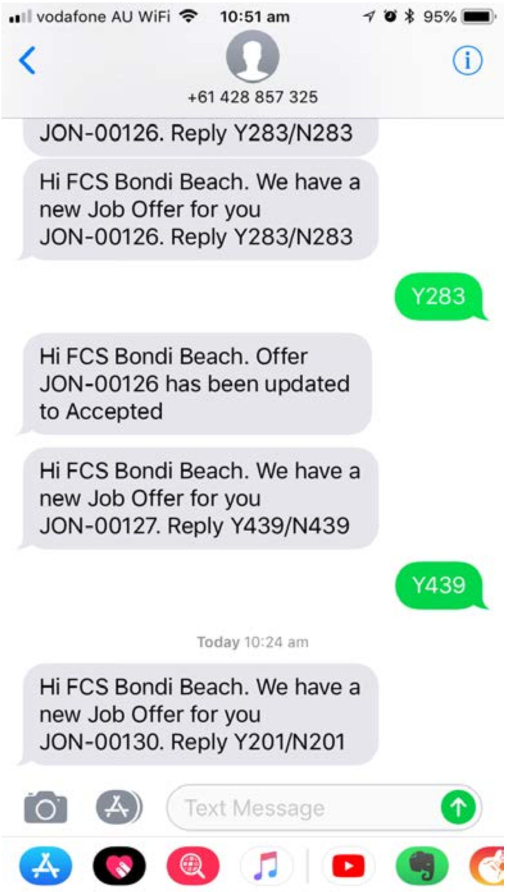
All email and SMS messages shown in this document are examples only. Messages you receive are customized for your business during implementation, and may contain information different from that shown here.

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

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

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

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

Information stored on a job

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

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

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

Actions available from a job

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

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

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

Statuses of a job

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

Automatic and manual Job Statuses

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

Many Job Statuses are set automatically.

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

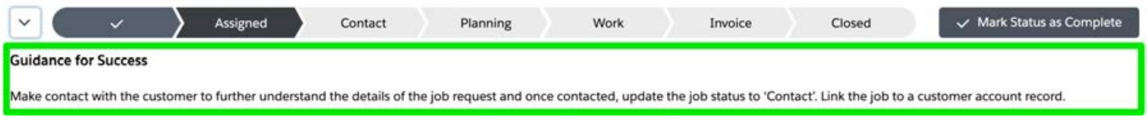
Other Job Statuses allow you to manually set the `Status` or the `Substatus` fields.

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

Guidance for success

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

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



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

Standard and Repeating Jobs

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

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

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

Job status summary

The top-level Job Statuses are described below.

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

Job Substatuses are described below.

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

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

Job Status	Substatus	Transition	Description
Work	Pending	Manual	Indicates work is being delayed. Reasons include: » Waiting for a deposit » Waiting on material or a signature Selecting a Substatus Reason is mandatory.
	Scheduled	Conditional	Work is scheduled. Automatic transition occurs if the Estimated Hours match Scheduled Hours with 1 hour of variance. Otherwise manual.
	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. This status not used when Franchise Profile Account's `Auto Close Job on Final Payment` is checked.
	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.

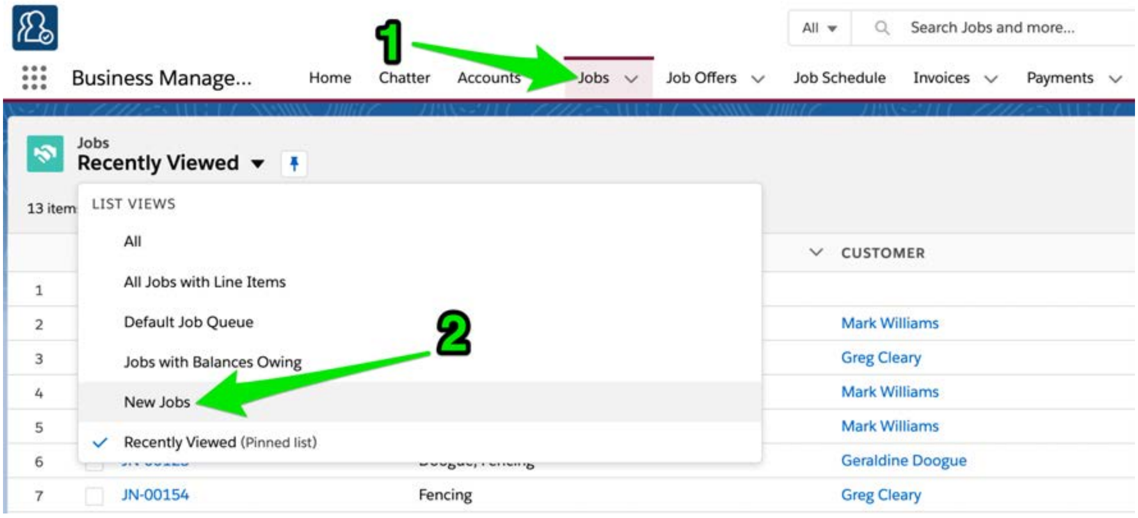
- When you accept a Job Offer, the Job is assigned to you.
- You then need to contact the prospect to see if this possible work can be turned into actual work.
- When a customer contacts you, you need to add the Job to the system yourself.

How to find newly assigned jobs

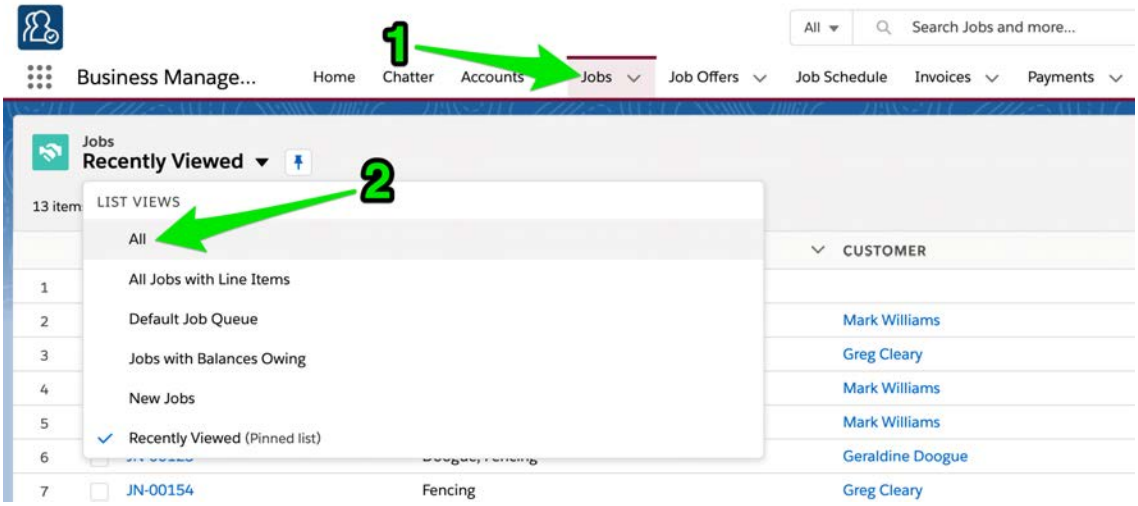
Jobs that have been assigned to you by your franchisor are placed on the **Jobs** tab.

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

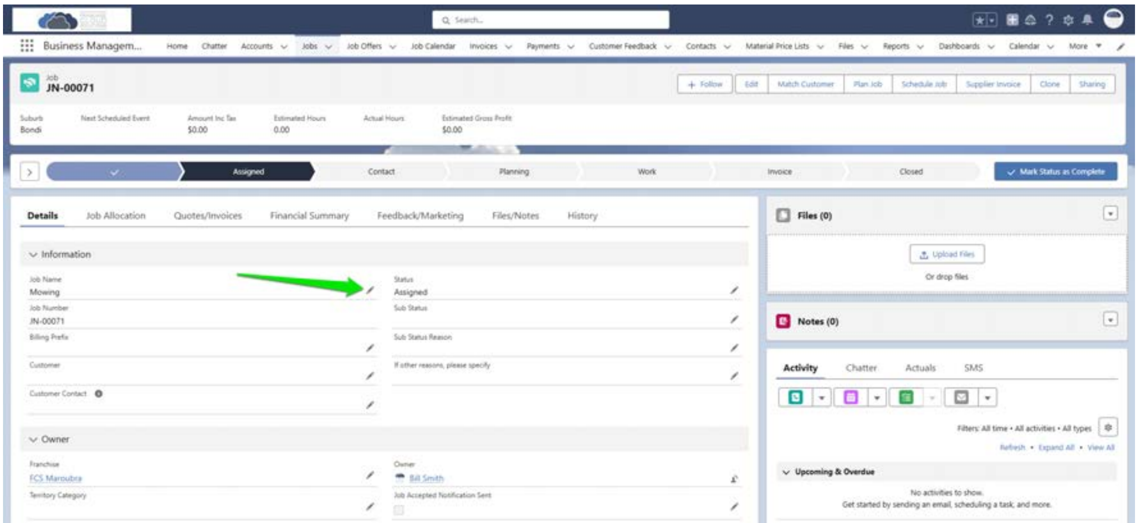
Naming the job

> 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.

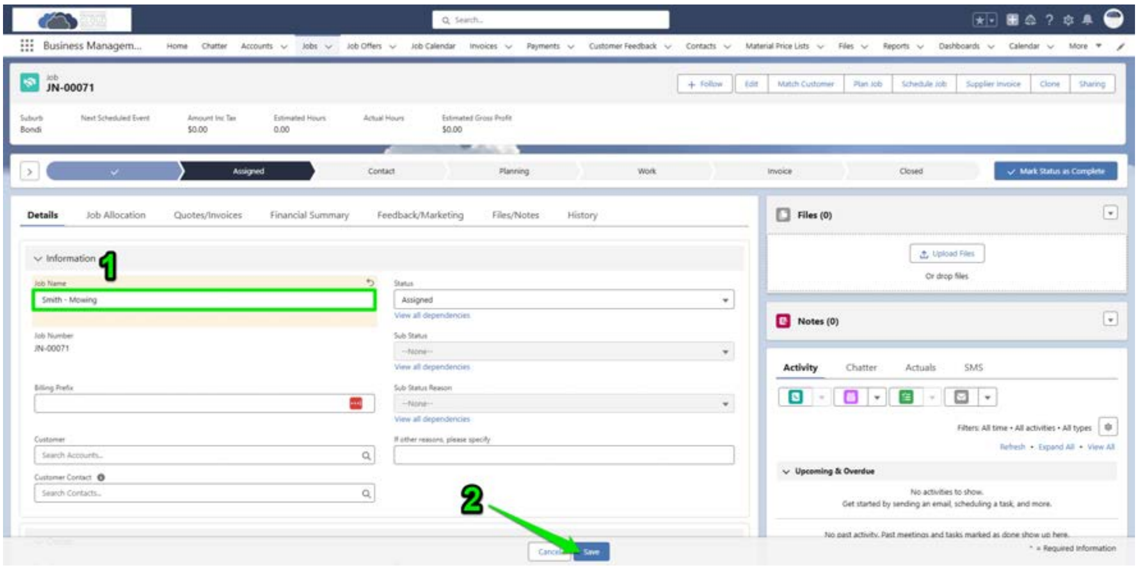
To name a job

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



The form switches into edit mode.

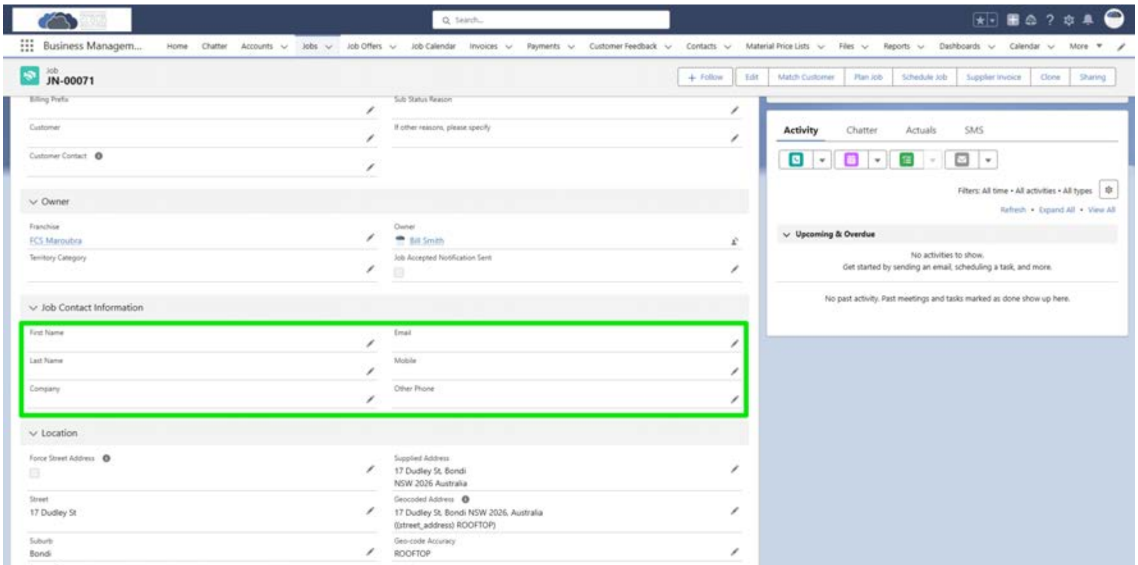
2. Enter the `Job Name` and press **Save**.



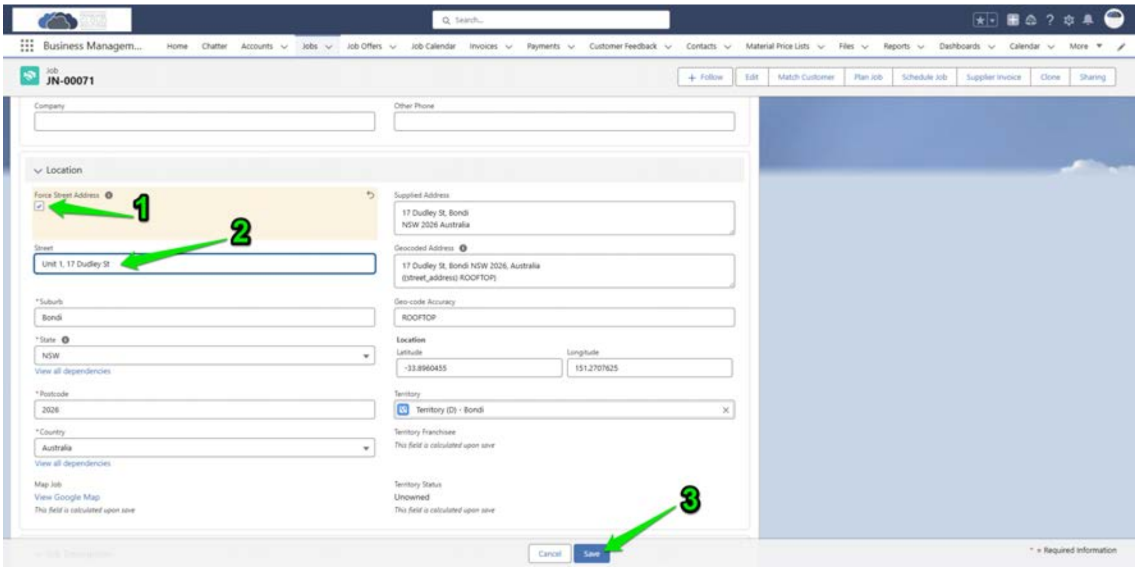
Reviewing job contact information

To update Job Contact Information

1. Capture any missing customer details.



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



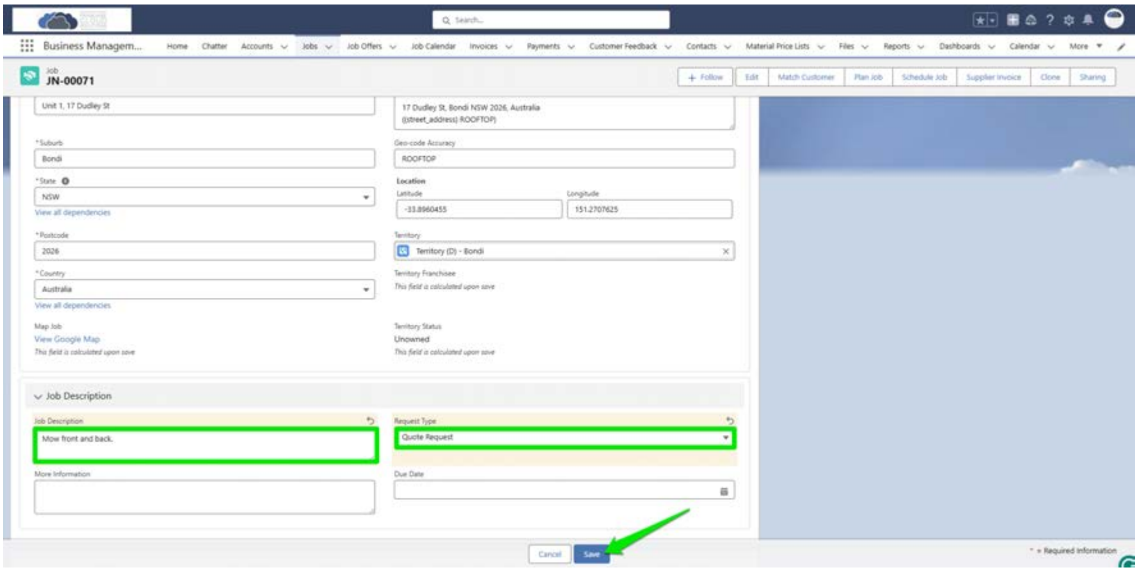
> The check mark in `Force Street Address` will disappear after save. To change the street address again, check it and then make your changes.

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**.



Matching customer contact details

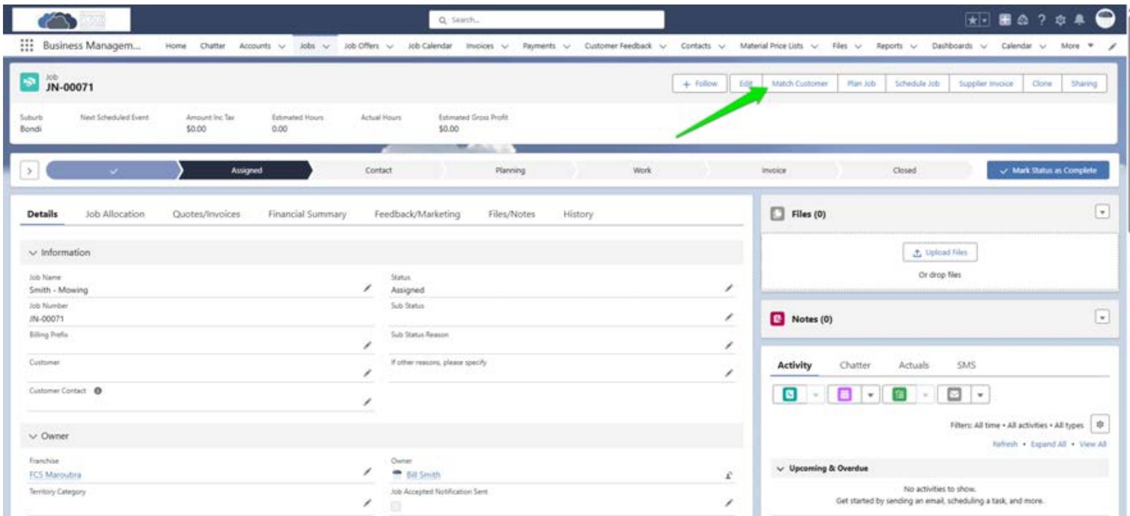
Having confirmed and updated any necessary details, now you need to either

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

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

To match the customer to an account

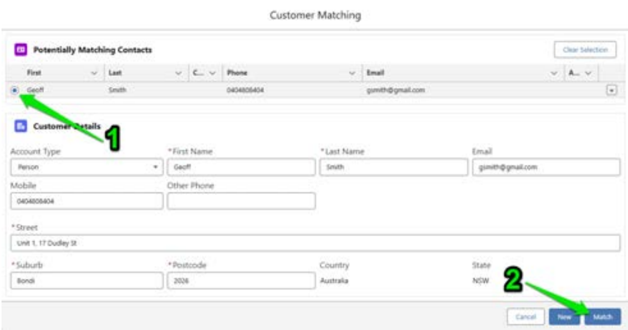
1. From the **Job**, press **Match Customer**.



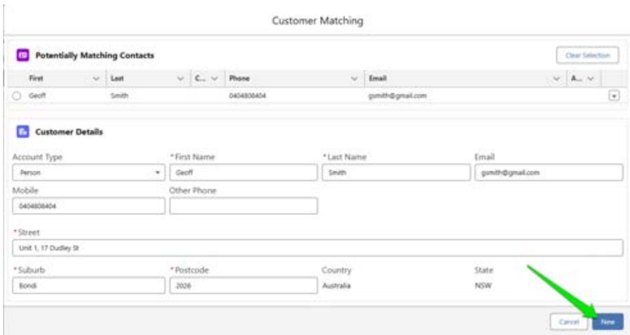
2. The **Customer Matching** dialog box displays.

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

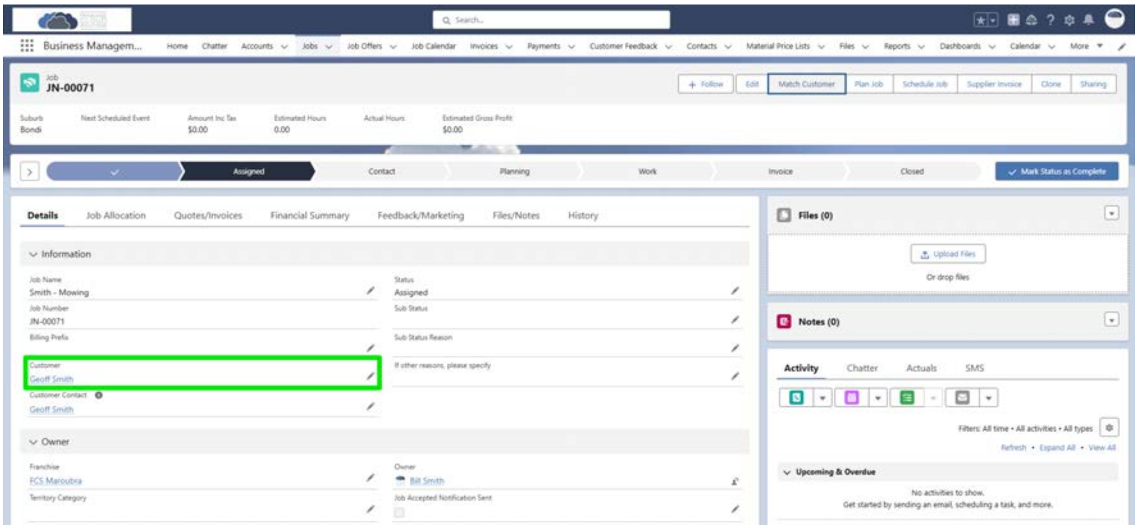
3. To link to an existing customer account, choose the existing customer then press **Match**.



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



5. The `Customer` is now added to the **Job**.

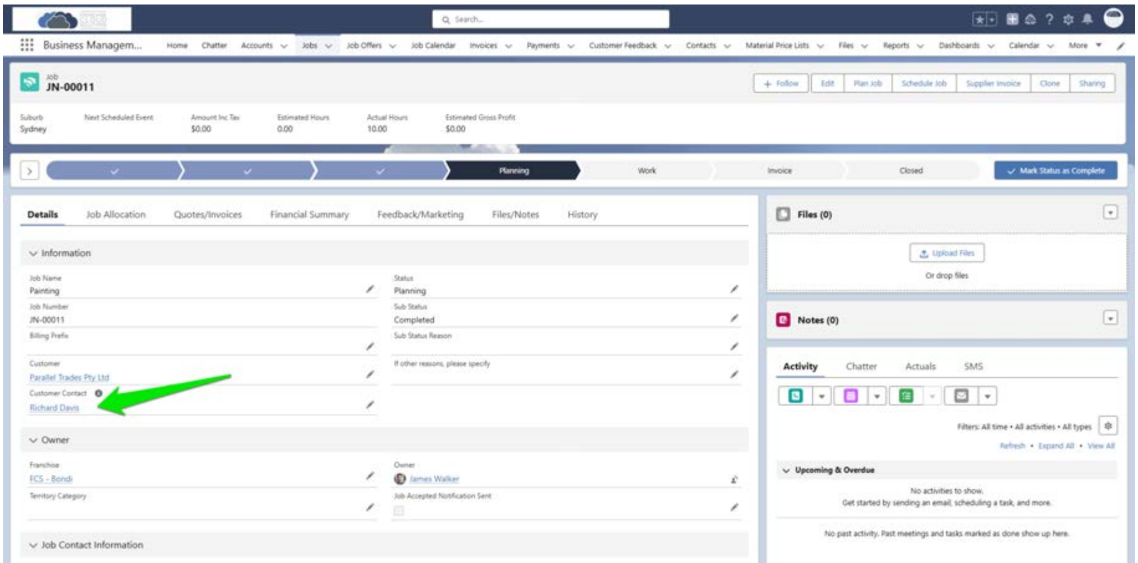


Updating marketing information and customer communications preferences

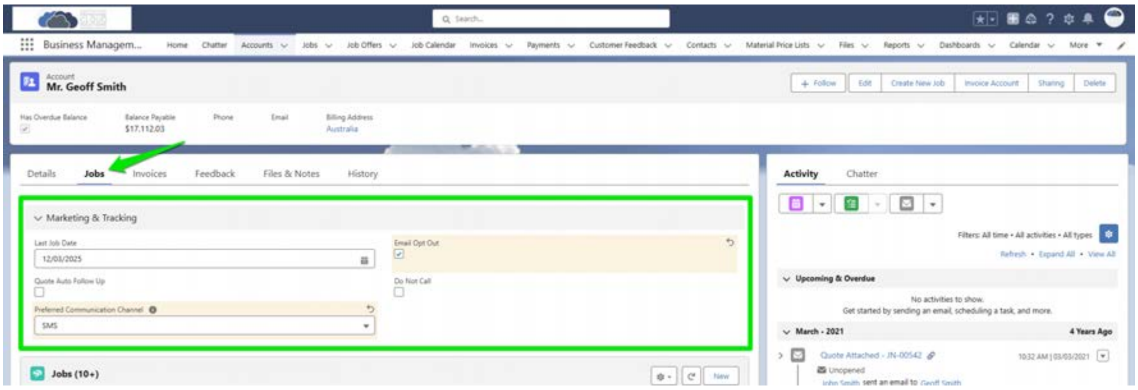
When you set up an account, it is useful to capture customer communications preferences.

To update the marketing information and customer communications preferences

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



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

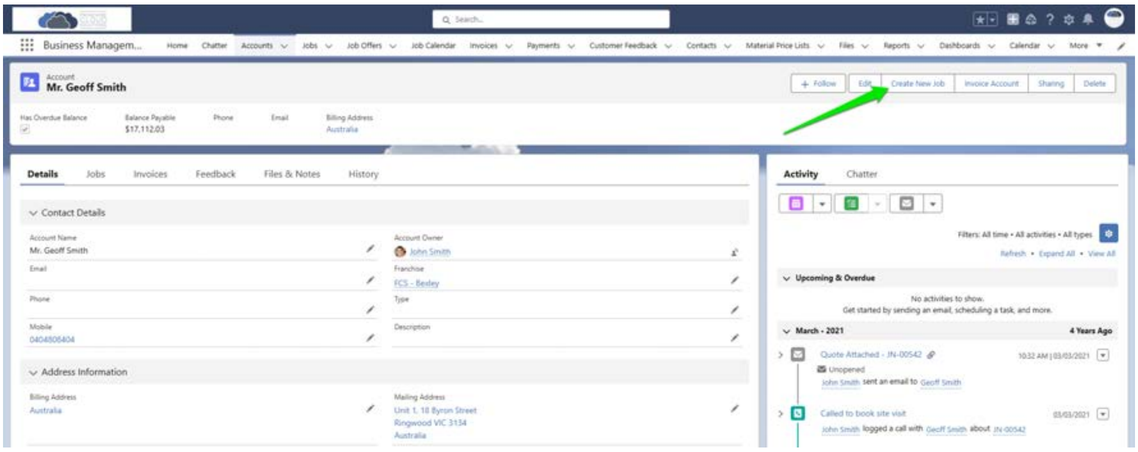


How to create a new job

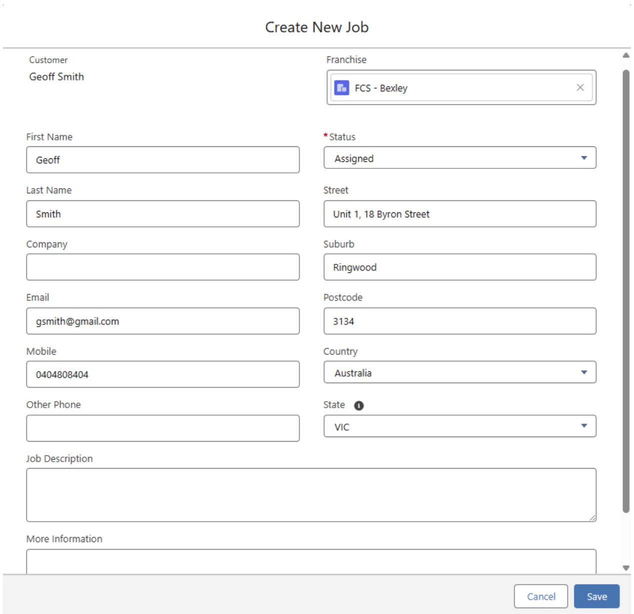
When new customers contact you directly or existing customers want you to do some work, you will want to create a new job. The best way to do this is to start with (or create) the **Account**, then from there to create the new **Job**.

To create a new Job

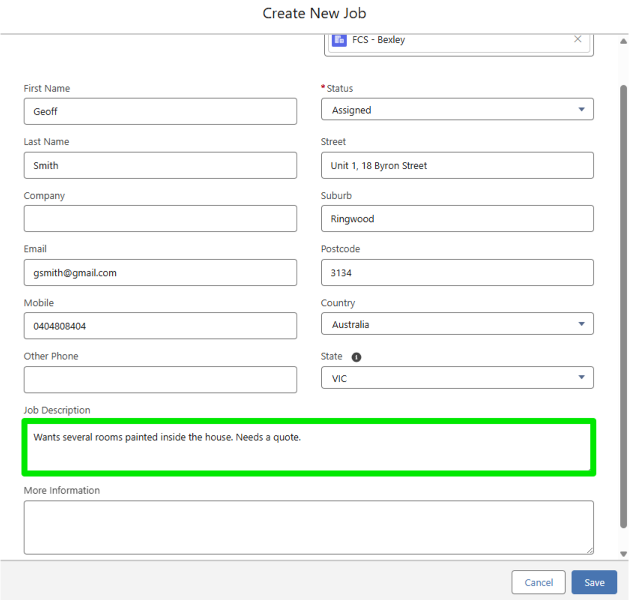
1. Search to see if the customer is already in your system, *See* “When a customer contacts you” on page lxxviii.
2. If you need to create a new customer account
   - *See* “How to create an account for an individual customer” on page lxxix, or
   - *See* “How to create an account for a business” on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



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

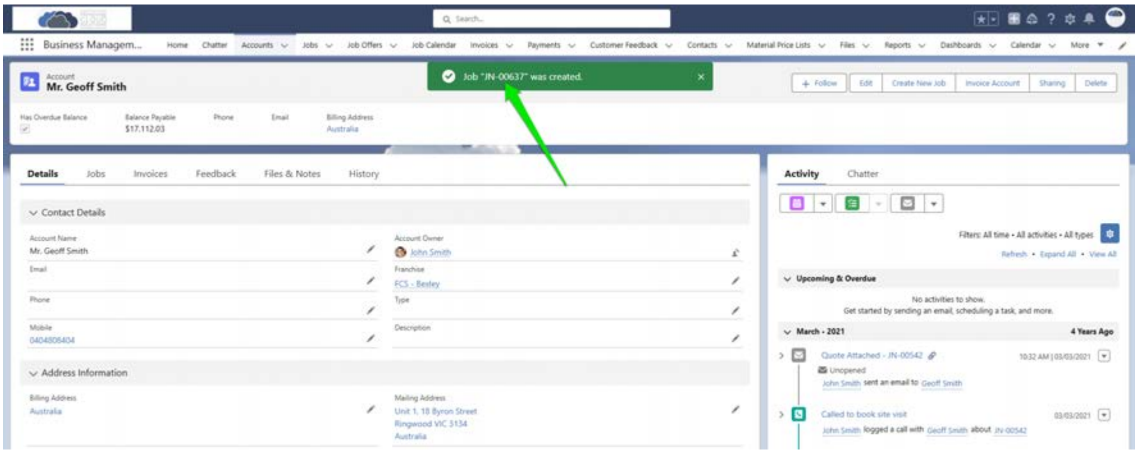


5. Enter any information about the job in the `Job Description` field, then press **Save**.

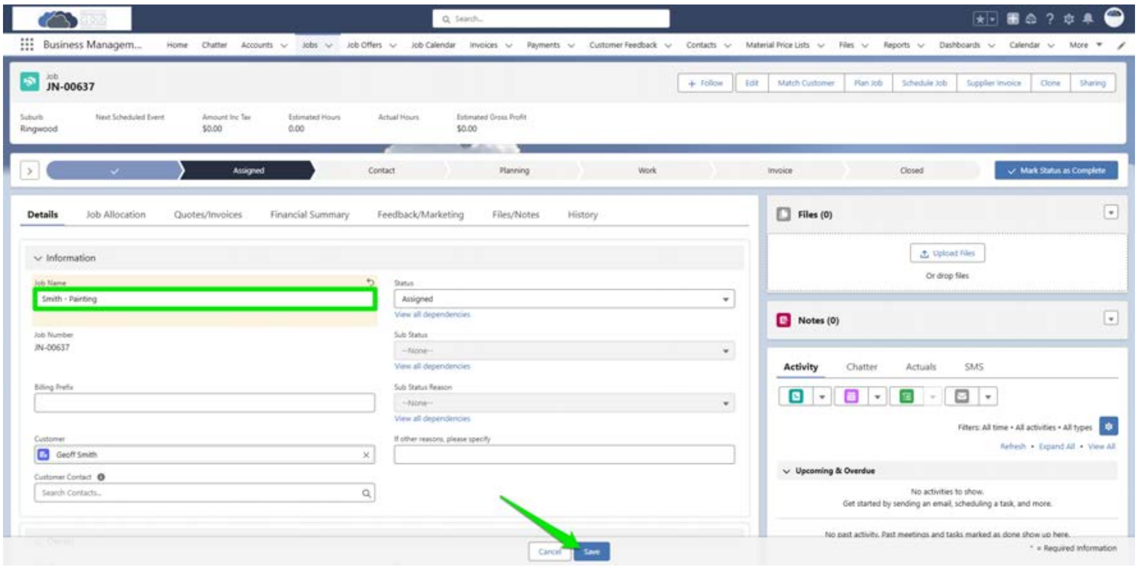


> It is really important that the **Job Contact Information** include the actual address of the job. The address of the job may very well be different from the Customer's mailing address (which is where you send the invoice). Capturing the correct job address affects the Job's **Territory & Location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

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



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

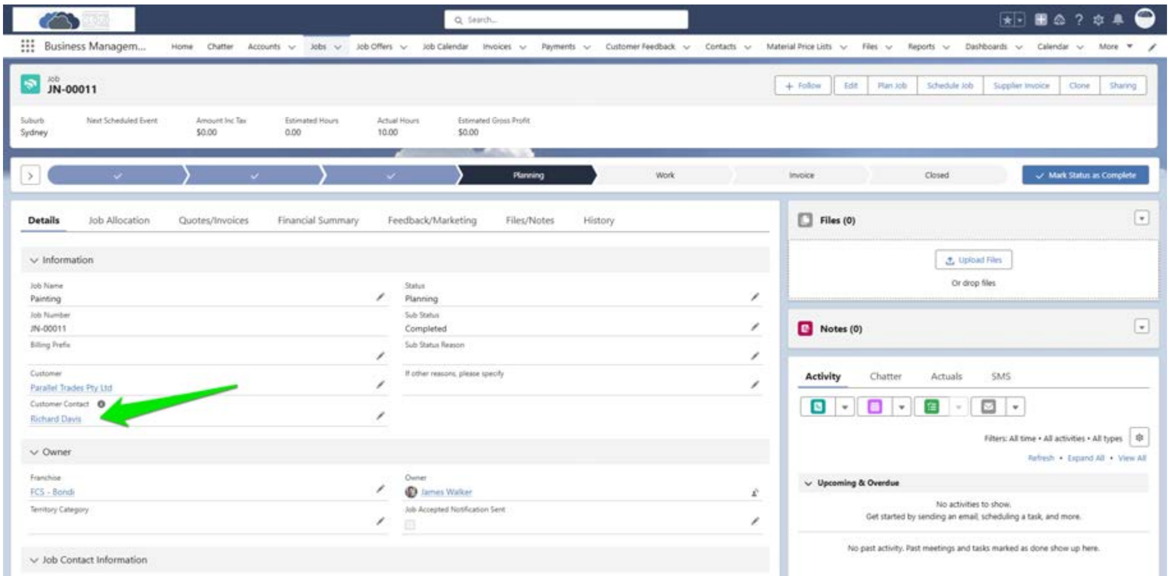


> It is helpful to develop a standard way of naming each job.
>
> The most common way of naming a job is *Last name – Job Suburb*.

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.



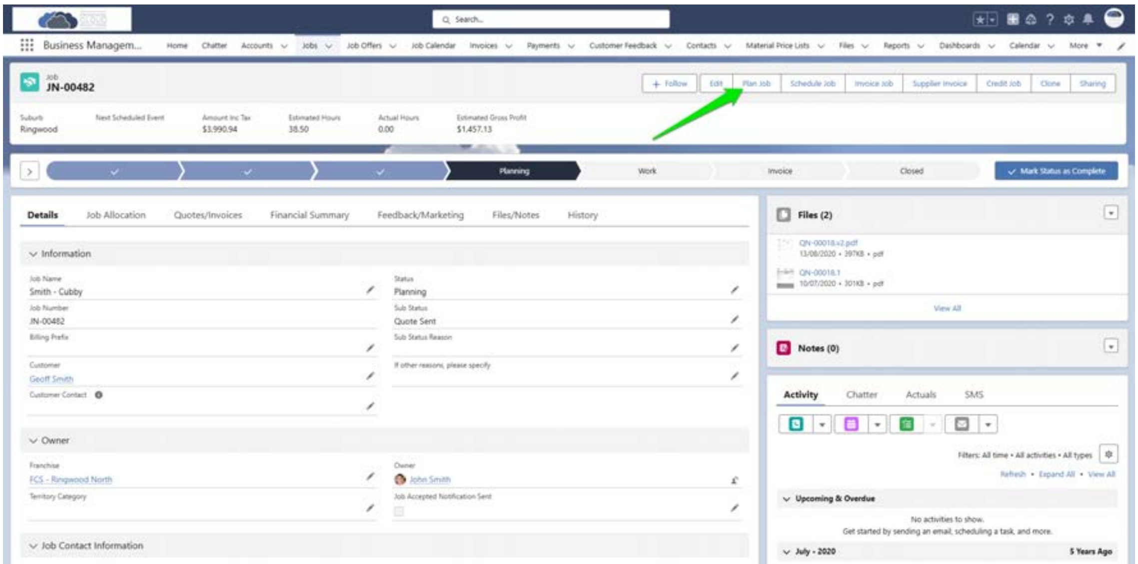
To add a customer contact to a job, the contact must be attached to the business account. For more information, *See* "How to add a contact to a business account" on page lxxxii.

Job planning and estimation

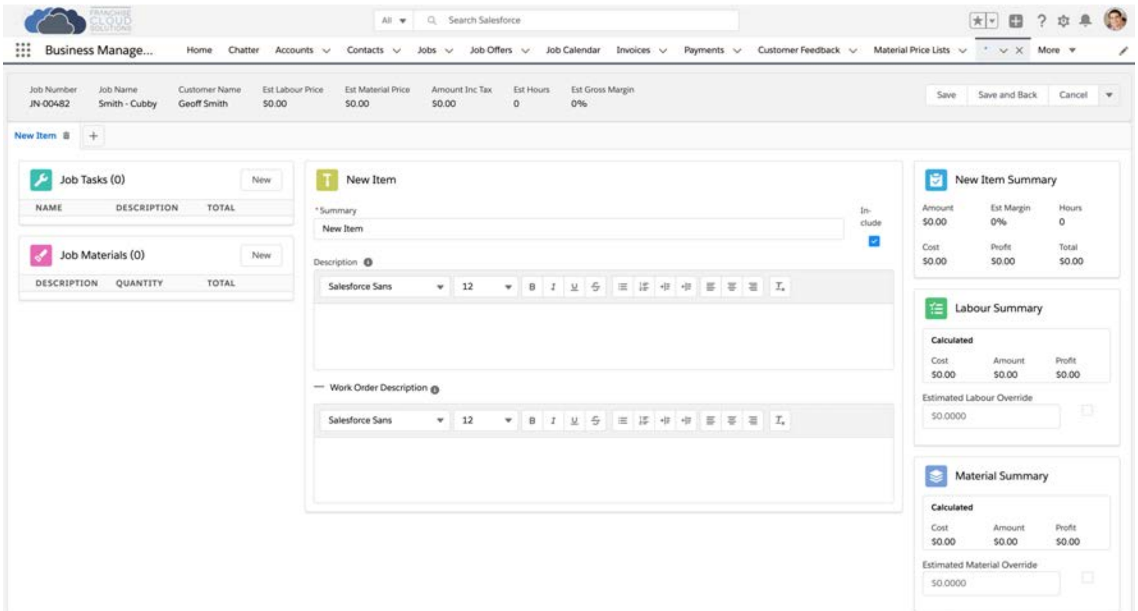
Business Management makes it easy to collect all the relevant information necessary to plan, estimate and schedule a job.

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

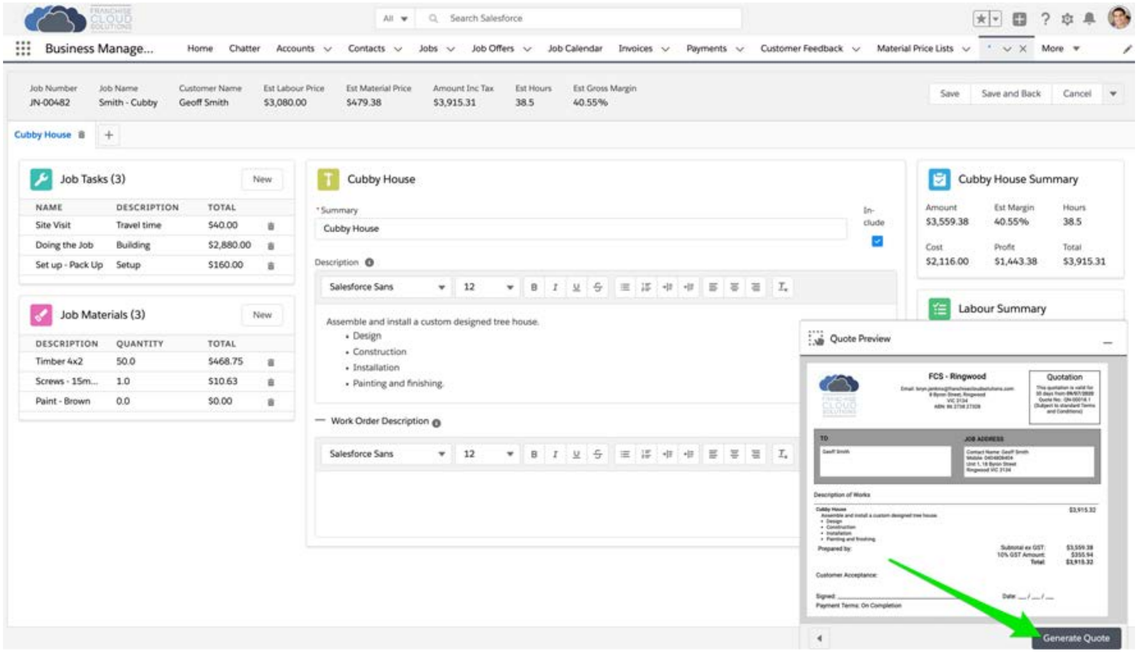
» “Quick quote: Adjust labour and material summaries” on page cxxxvi

» “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

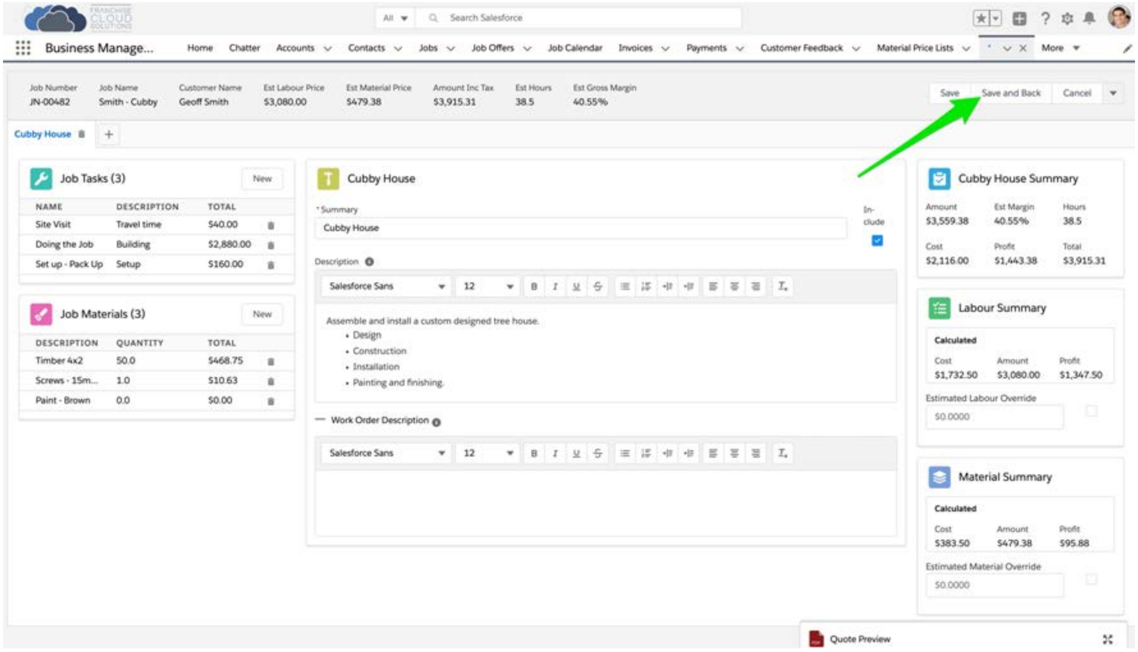
4. When you’re ready to send a quote, press **Save** to make the Quote Preview window appear. Click the **Expand** button and click **Generate Quote**.



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.



Understanding the job planning page

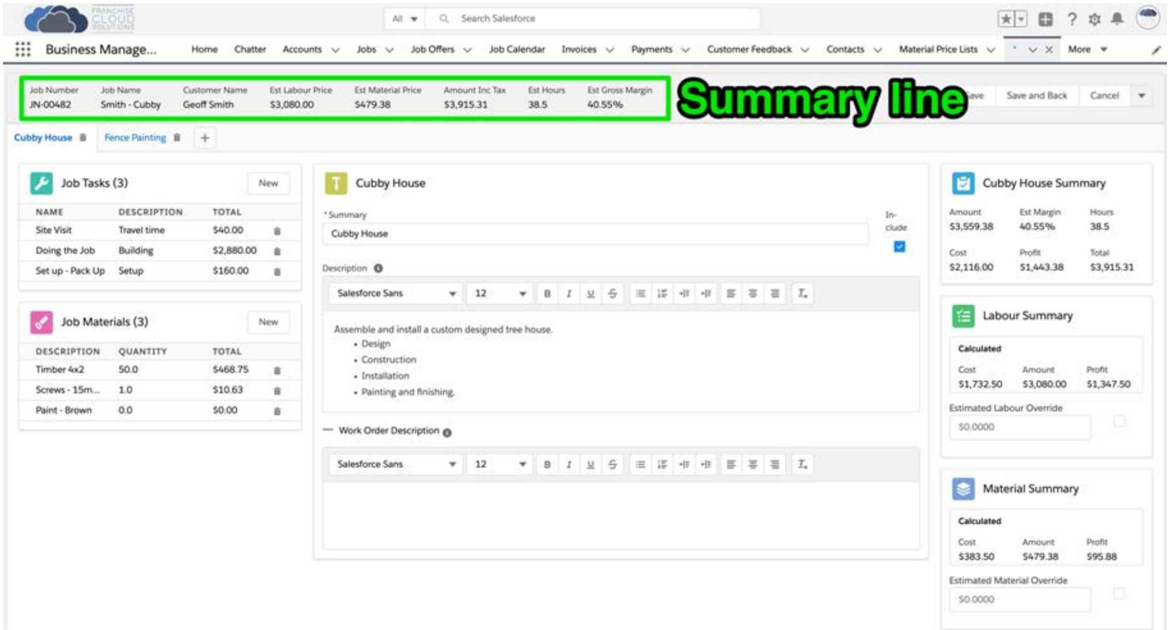
Job Planning helps you achieve multiple goals

- 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.

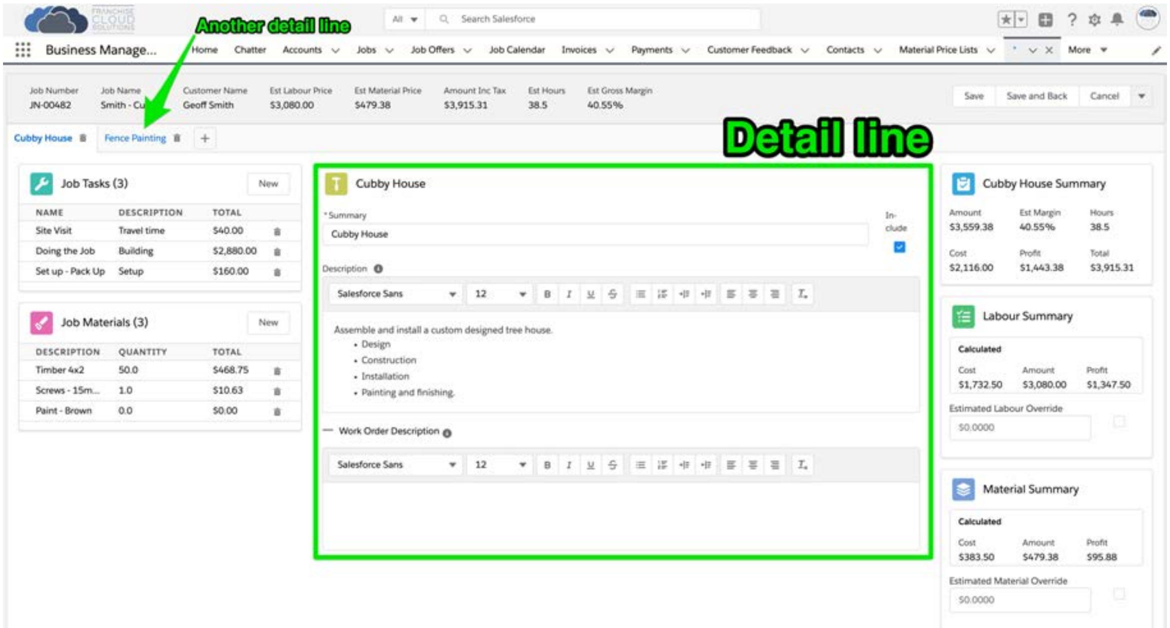
Summary line

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

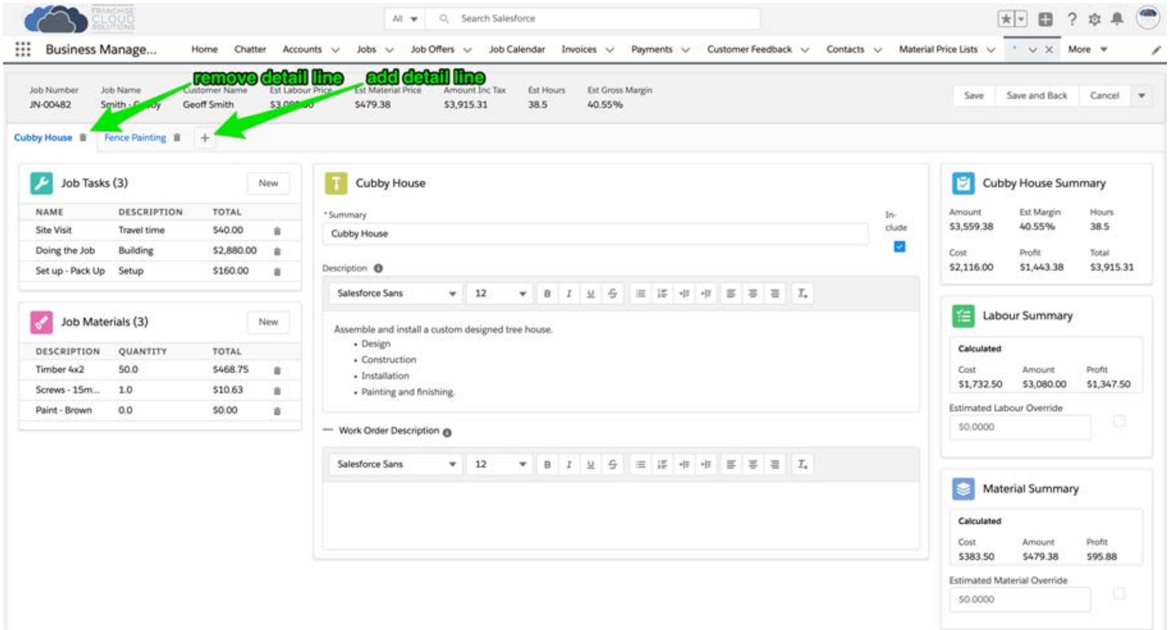


Detail lines

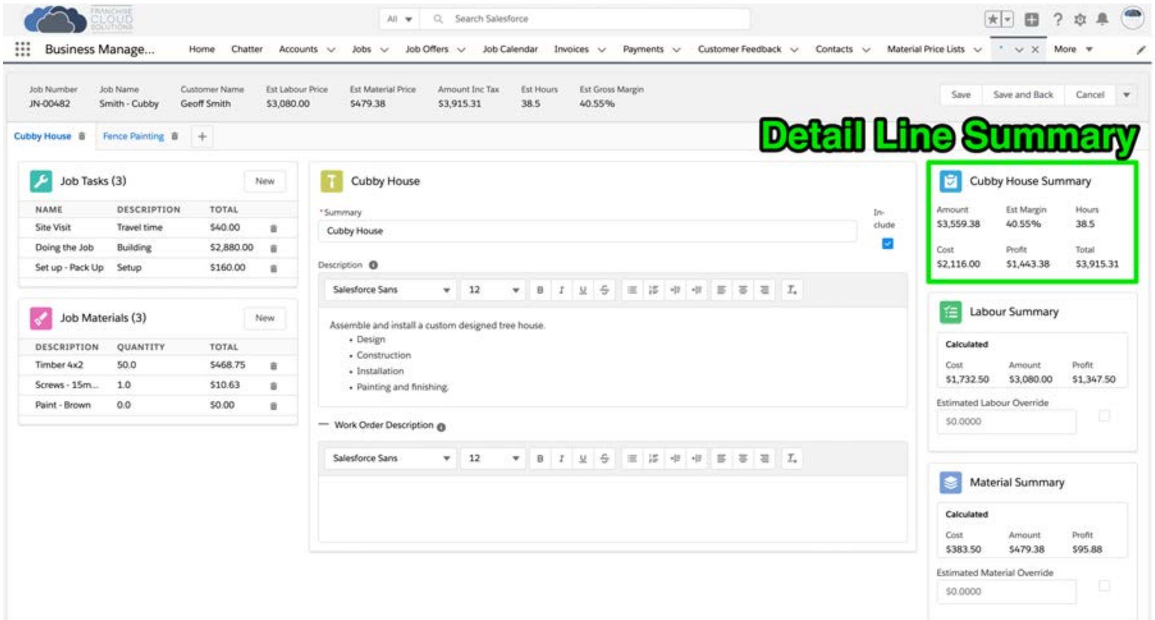
Detail lines provide the name and description of quote line and invoice line detail.



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.



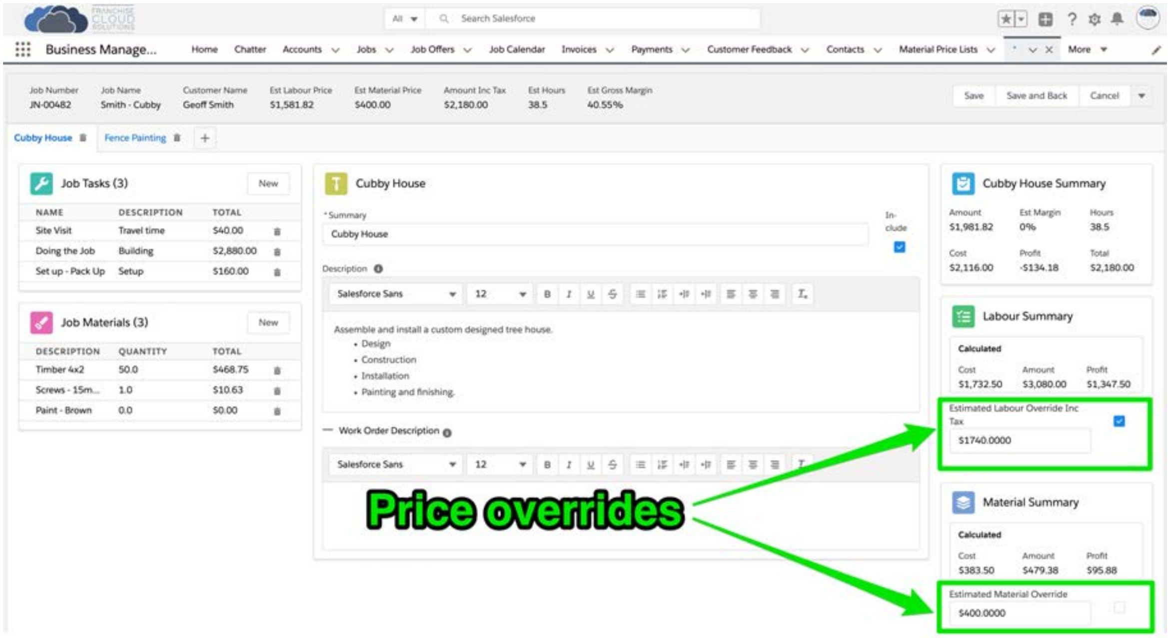
You can see the profitability summary for each Detail Line.



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`.

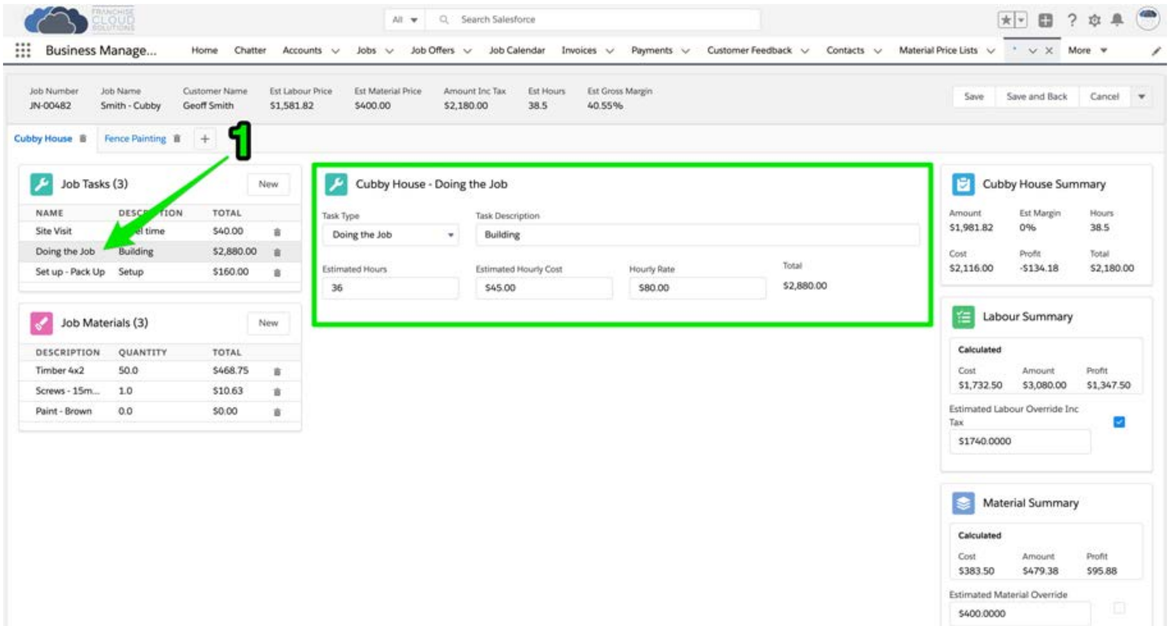


To override with a final negotiated price, make sure you check `Include Tax`. Leave `Include Tax` unchecked where you want tax to be applied on top of your price.

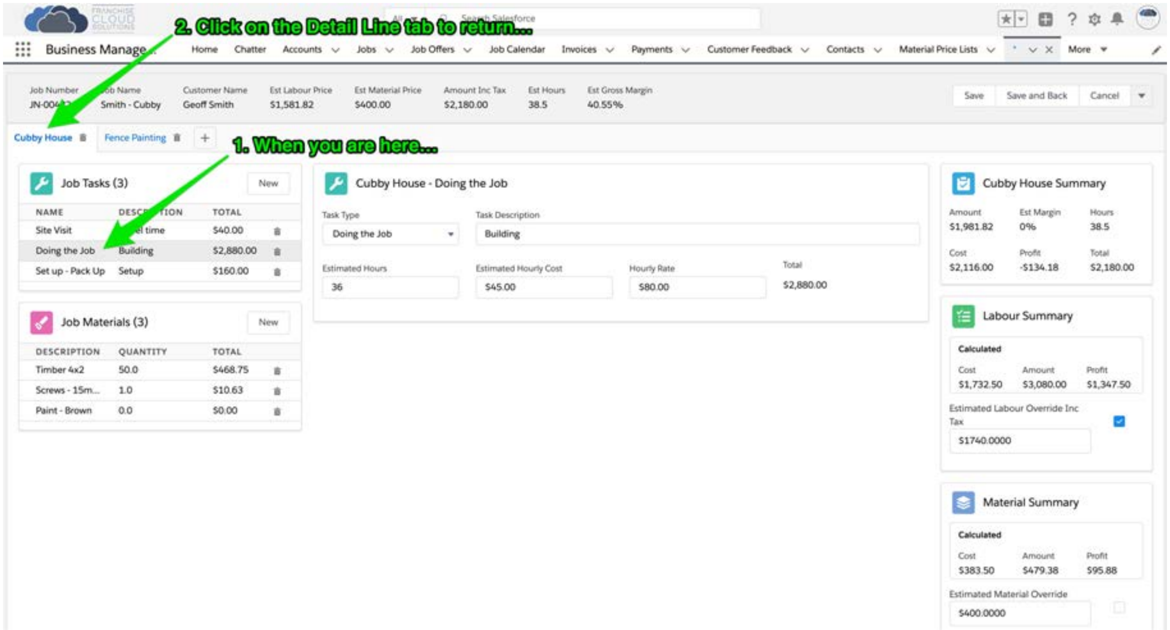
Job tasks

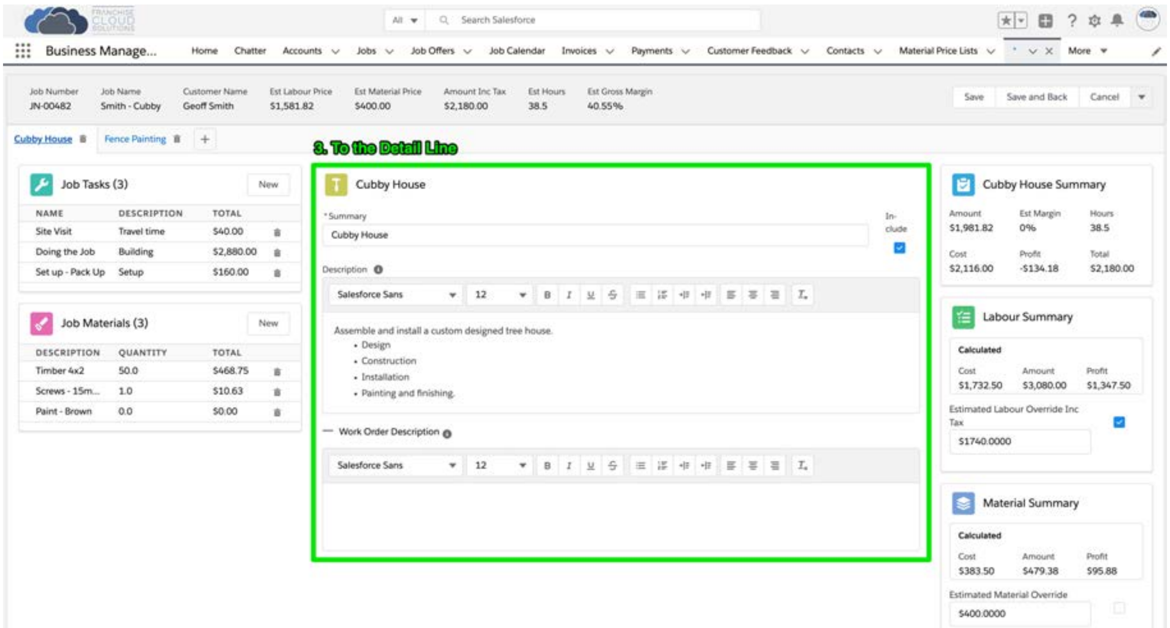
Job Tasks do not appear on any quote or invoice. They exist purely for the purposes of planning and estimation.

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



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).





Job materials

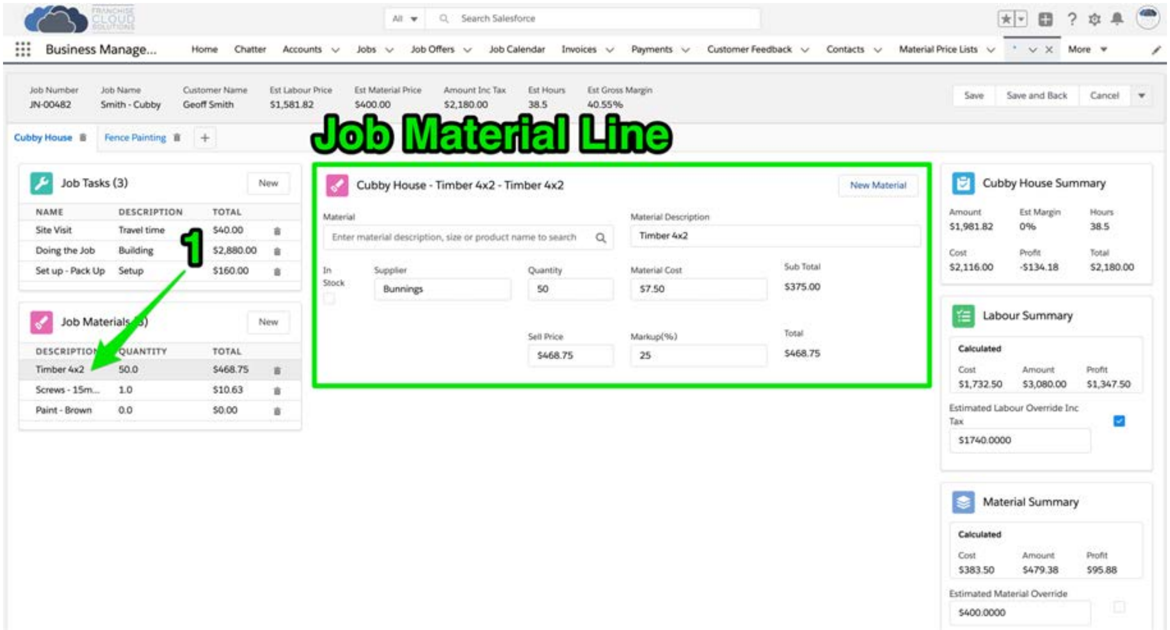
Job Materials do not appear on any quote or invoice. They allow you to identify

» 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



Other functions

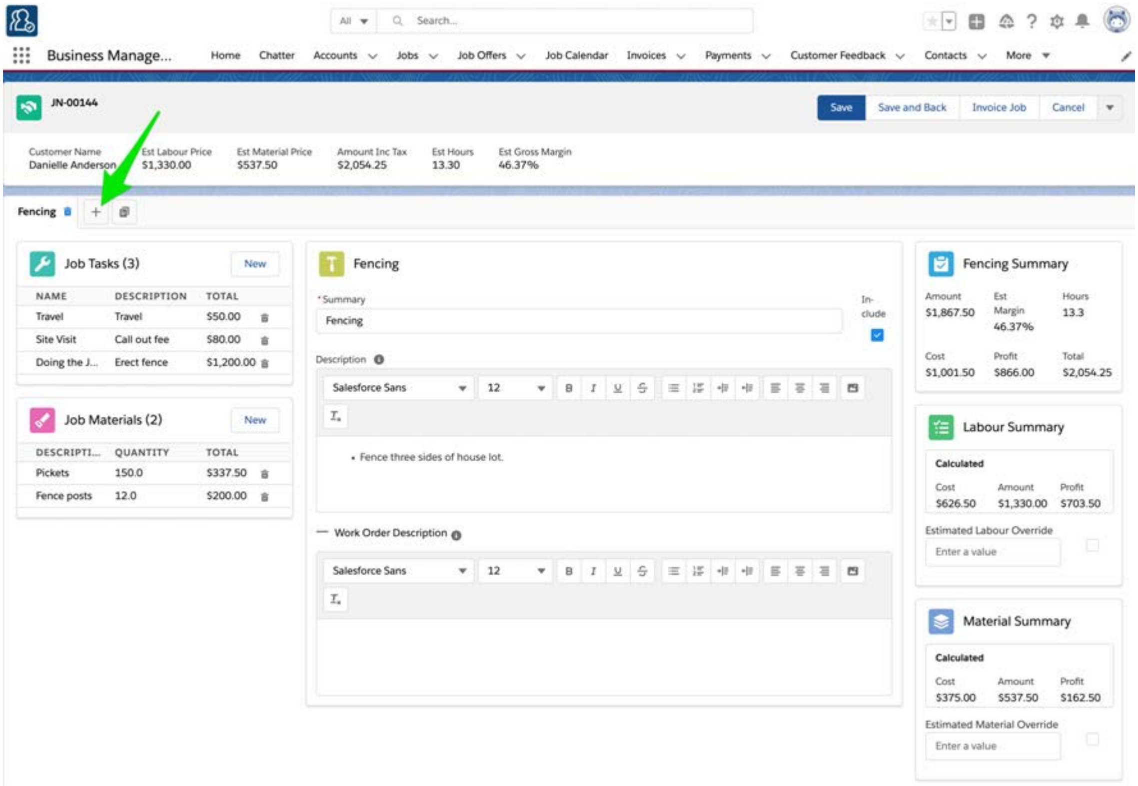
- To return to the **Job**, press **Save and Back**.
- To save any changes and remain within **Job Planning**, press **Save**.
- To more rapidly create Job Plans, *See* “How to use a job template” on page cliv and *See* “How to clone a job” on page clxxiv.
- To add a new material, *See* “How to add a 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

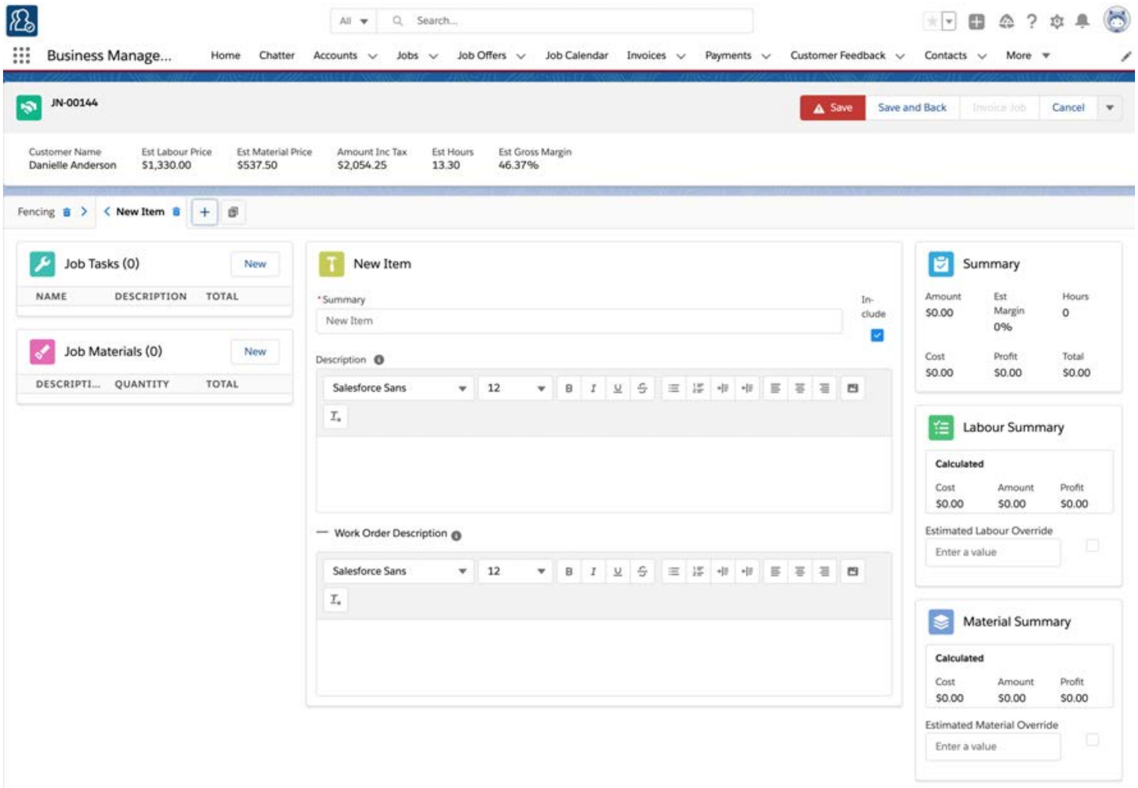
You can show multiple line items on a quotation or invoice by adding line items to the job plan.

To create a new line

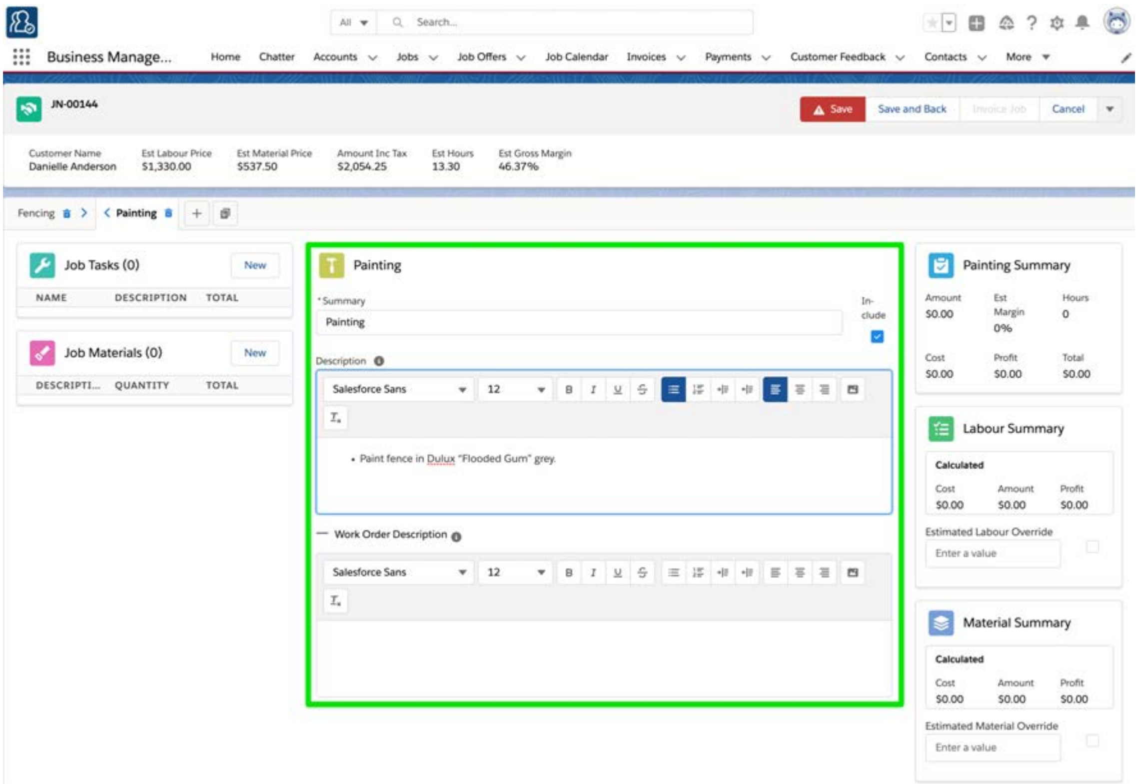
1. Press the **+** button.



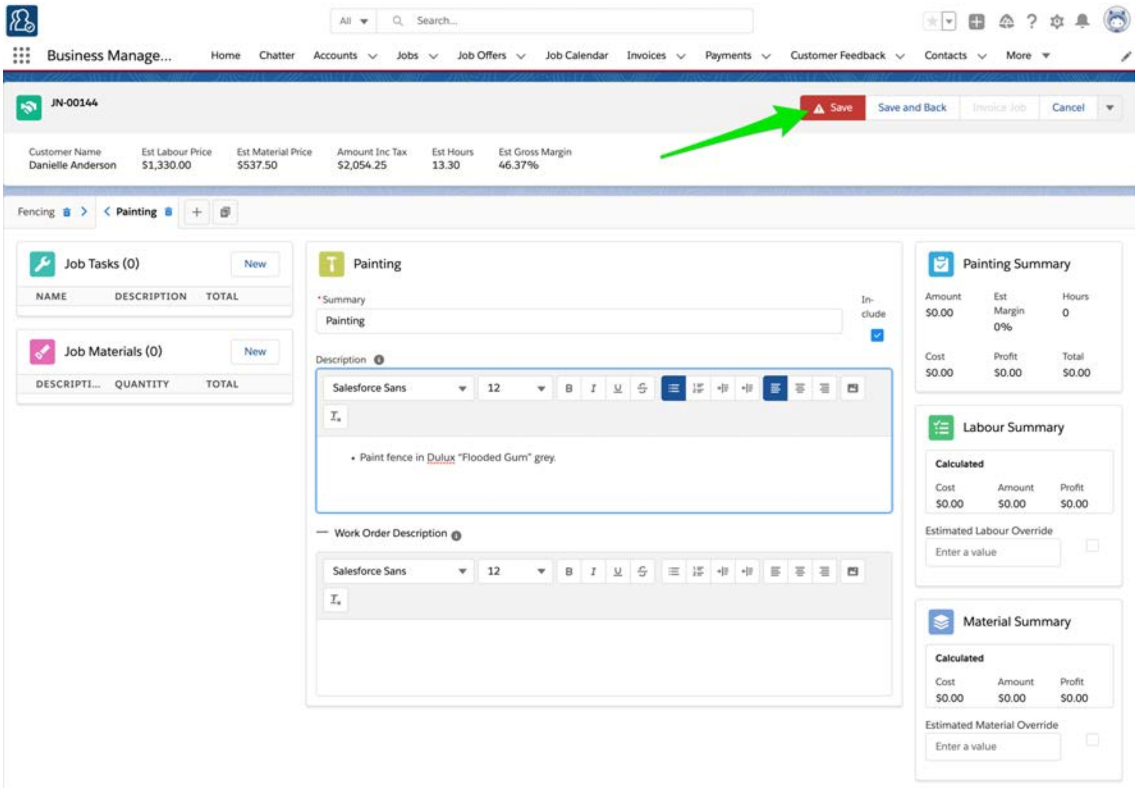
2. The **New Item** appears.



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



4. Remember to **Save**.



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

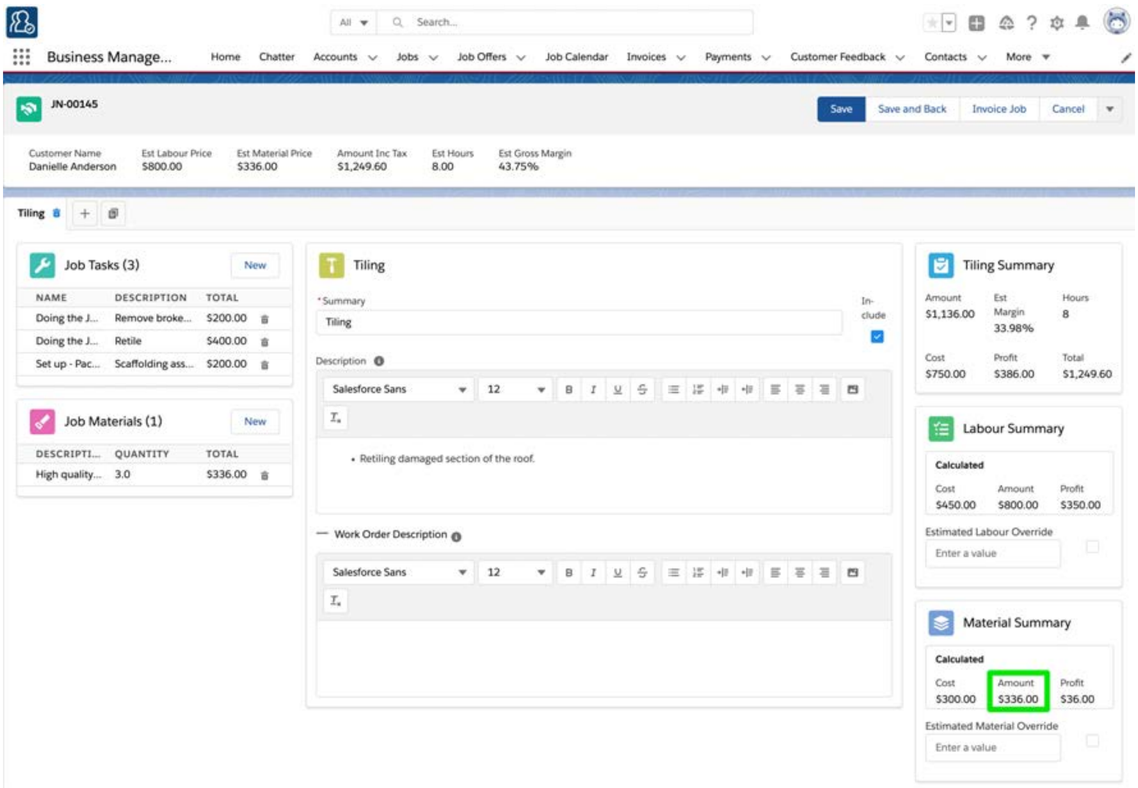
Quick quote: Adjust labour and material summaries

> 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.

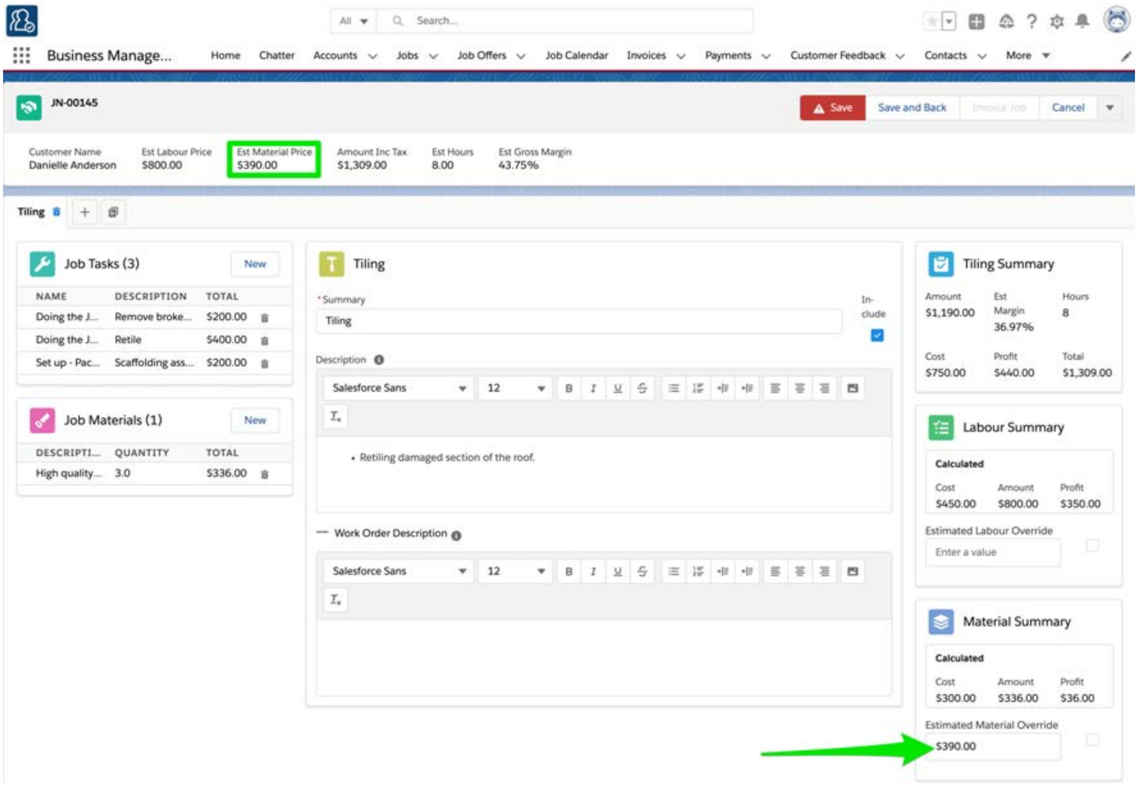
Once you have built your best estimate of the labour and material inputs in delivering this service, you can review the **Labour Summary**, **Materials Summary** and overall **Summary** for the job plan.

To adjust the Labour Summary or Material Summary estimates

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



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



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

No matter what you initially estimate, you can override your detailed estimates with a preferred value, OR

You can use these fields to dispense with detailed quoting and simply enter the price you want to charge to customers.

Detailed quote: Add job tasks and work estimates

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

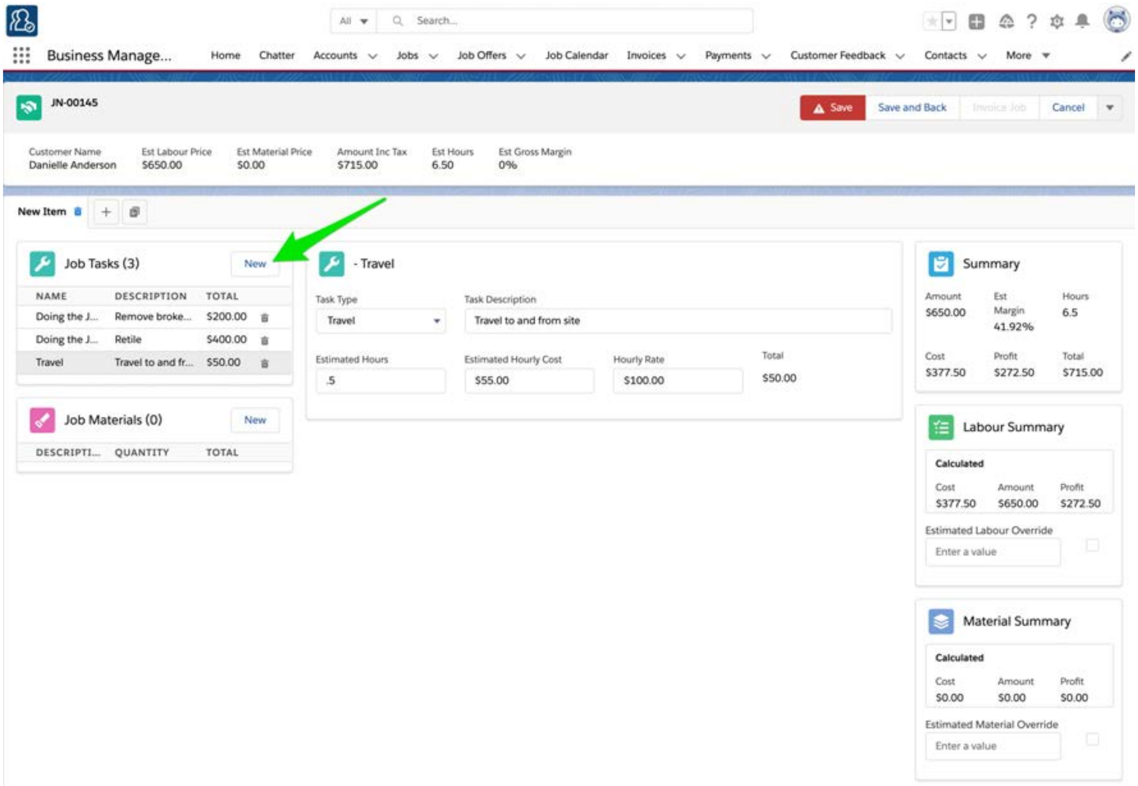
To help compile these costs, you can enter a list of **Job Tasks**. Each Job Task can be viewed by buy price and sell price. You can manipulate your desired markup above cost.

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

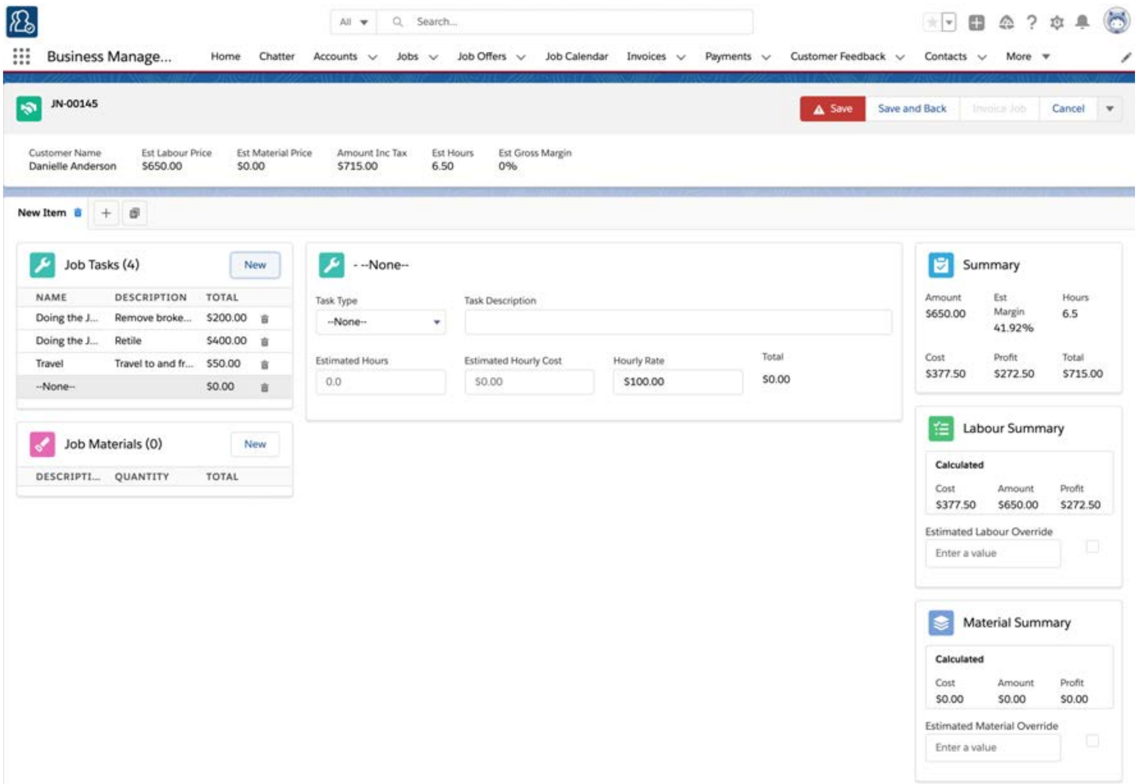
None of the details entered into the **Job Tasks** will be seen by the customer. Job Tasks helps you plan the work and estimate prices only. Any pricing information you add to the Job Tasks or

To create new a Job Task

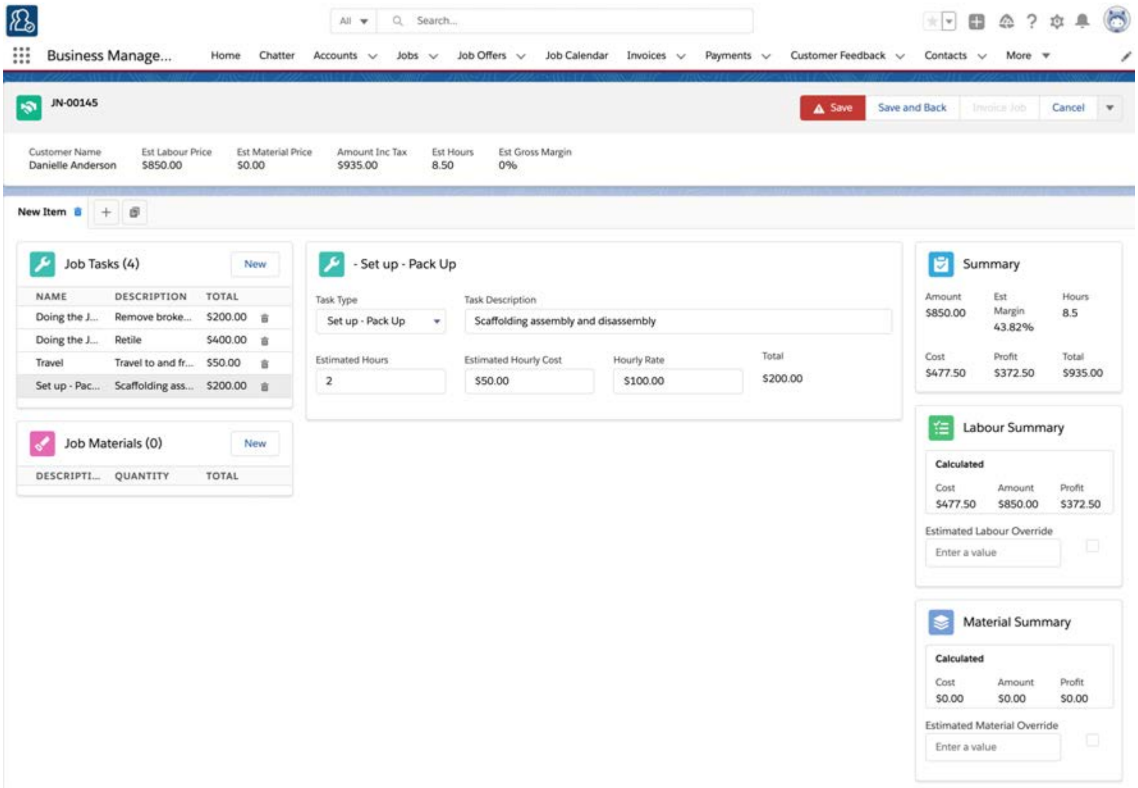
1. From the **Job Tasks** section, press **New**.



A new Job Task line item displays.



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.

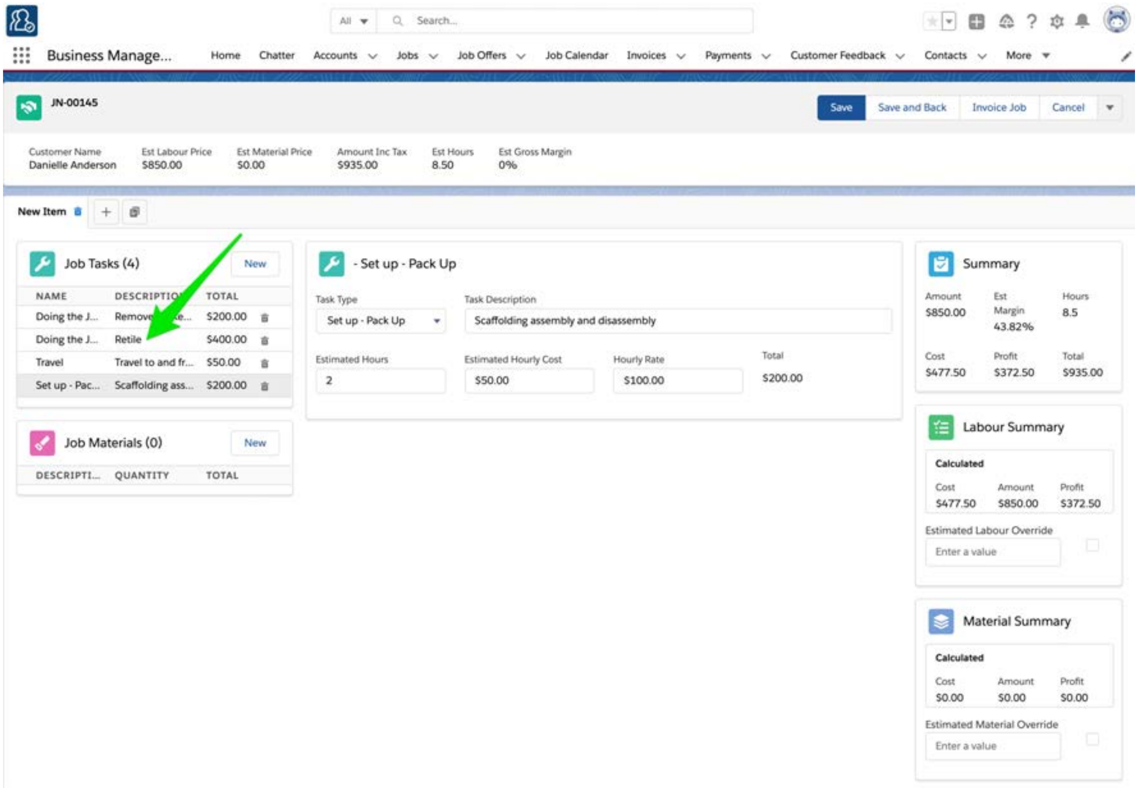


If the default value of `Hourly Rate` is not current, you can change the default within the Franchise Profile Account. *See* "How to set defaults for quotes and invoices " on page xlvi.

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

To change a Job Task

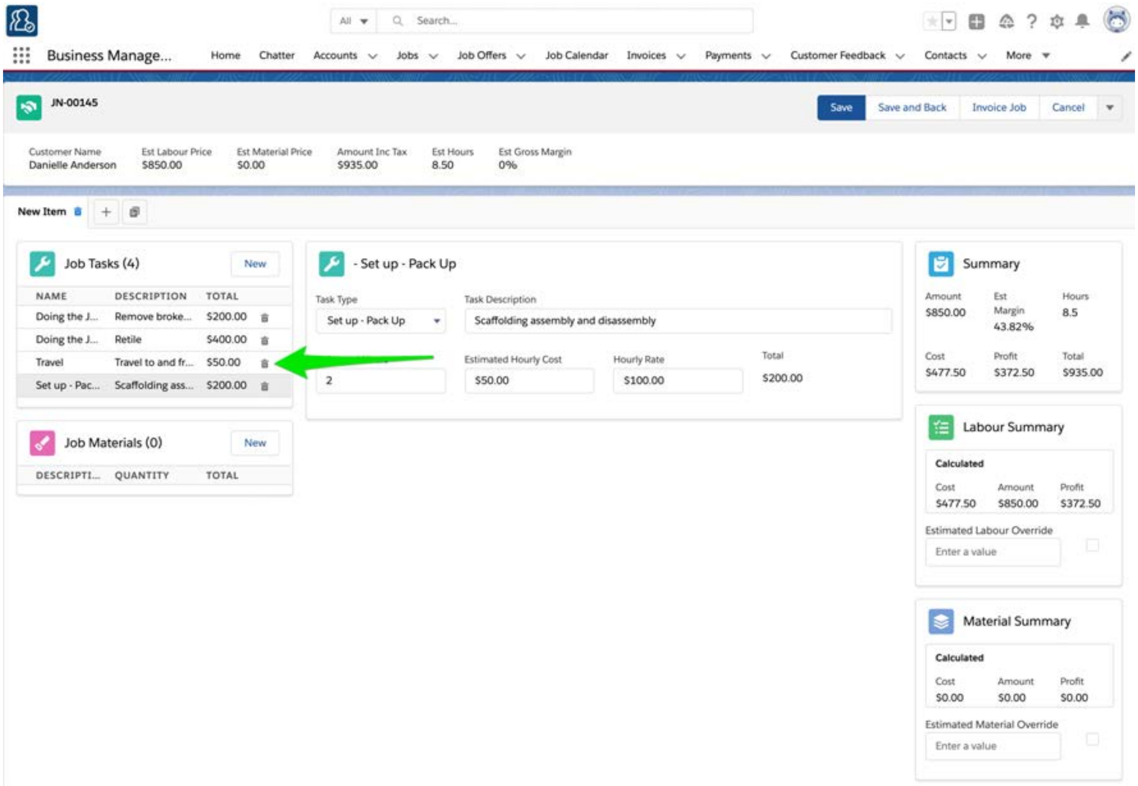
1. Click any of the Job Task lines.



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

To remove a Job Task line

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



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

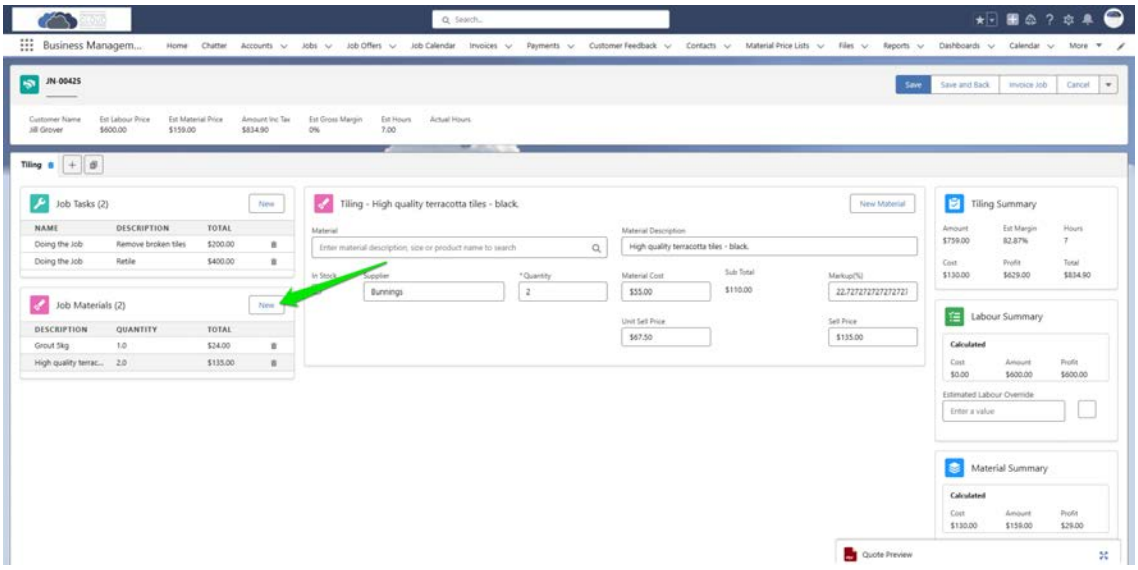
Detailed quote: Add materials and material estimates

> 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.

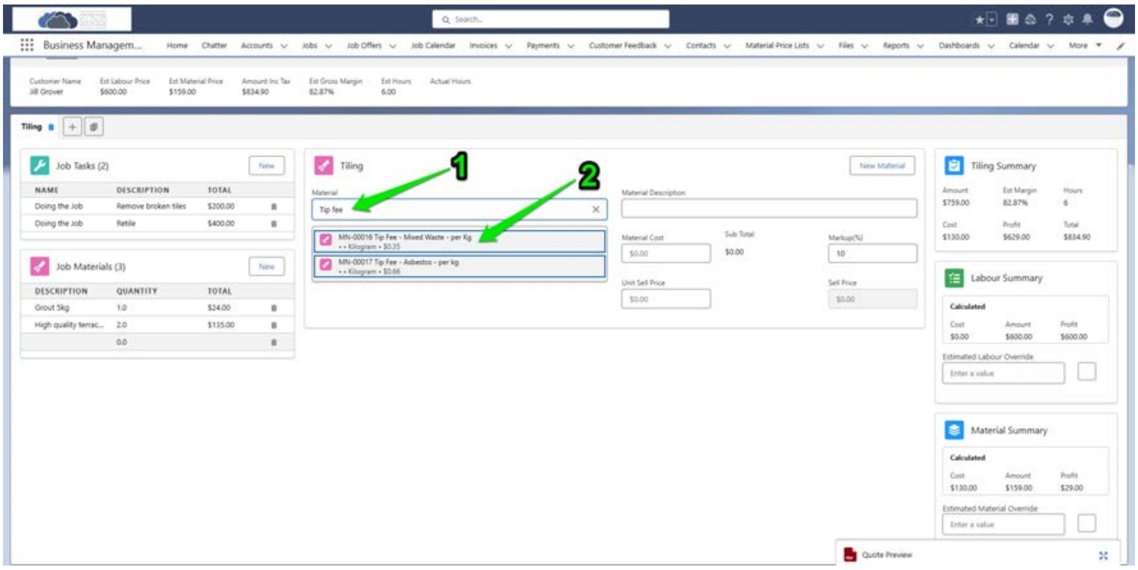
Job Materials allows you to list all the materials required to complete the job. You can add materials either manually, or populate them automatically from a price list. *See* “Working with Material Price Lists” on page cdxvi.

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

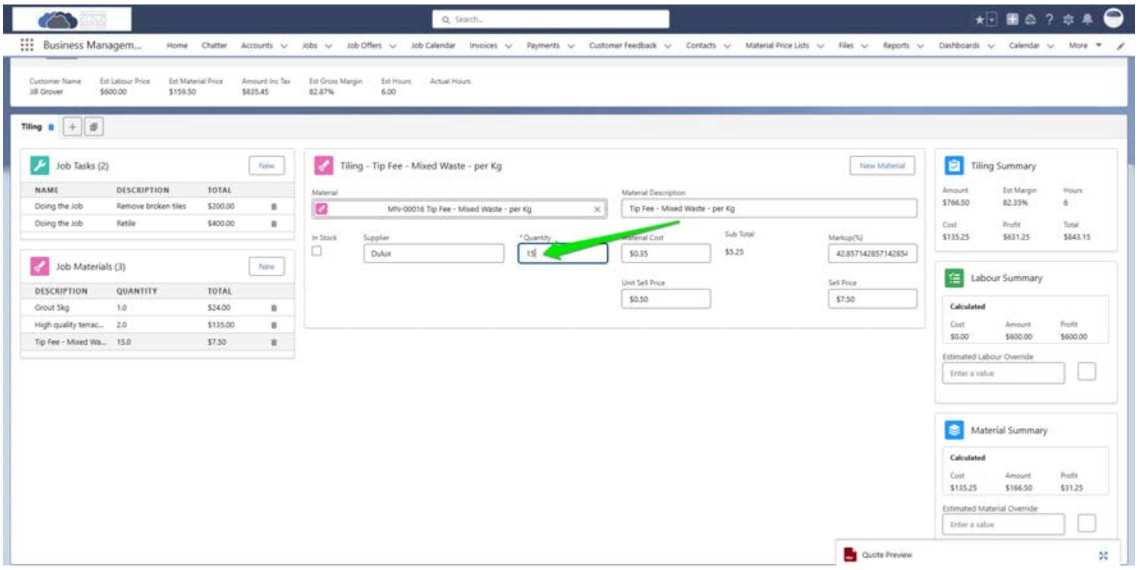
1. From the Job Materials list, press **New**.



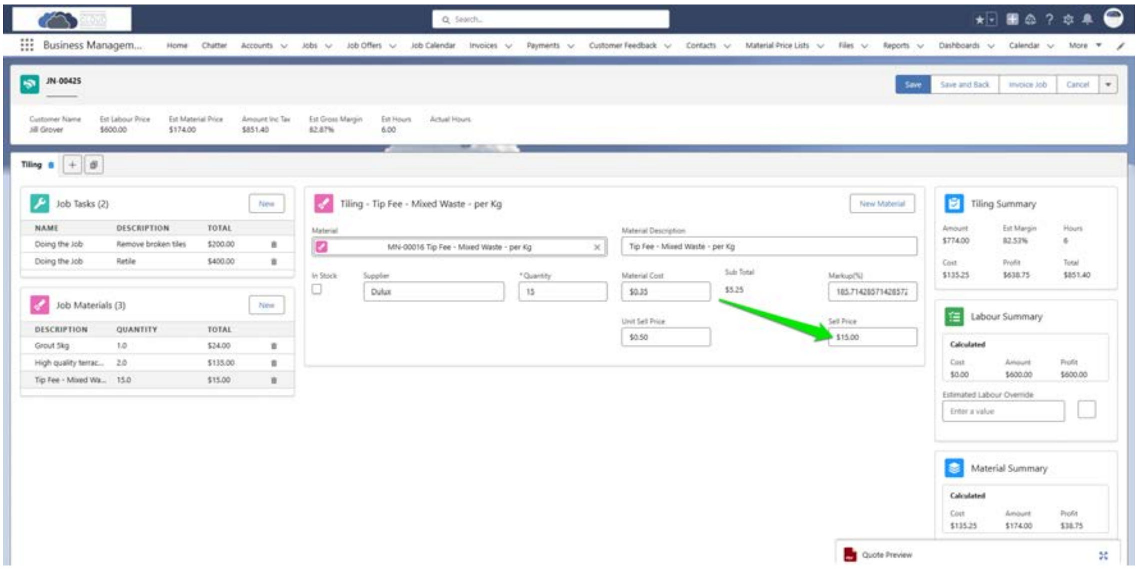
2. From the **Job Material** line, enter a search term into the `Material` field. The system will search for the term within Material Price Lists. Select your intended material from the search results.



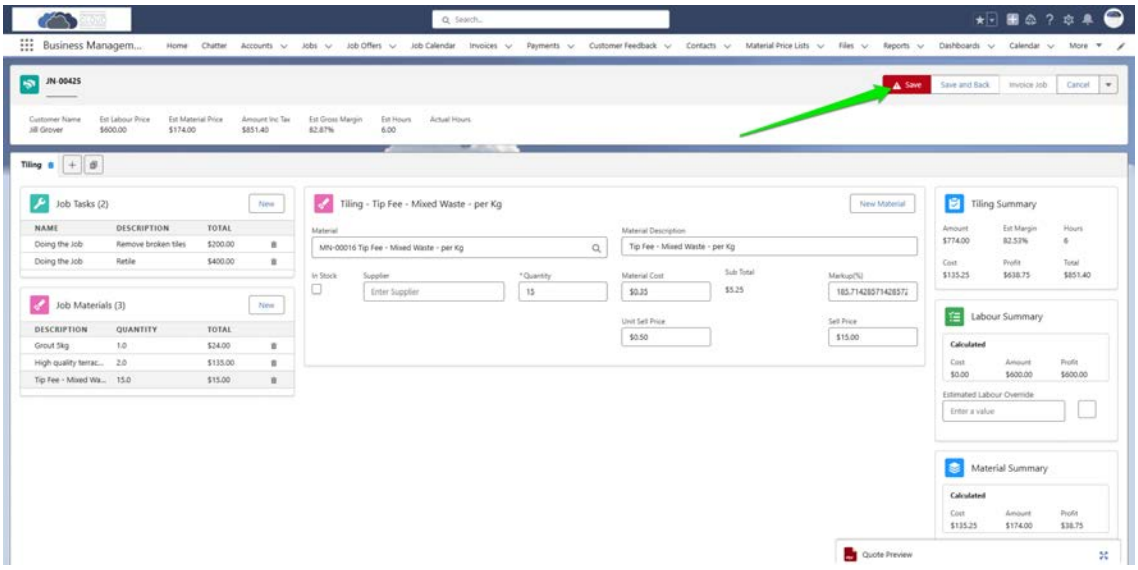
3. Having selected the material, enter the `Quantity`.



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



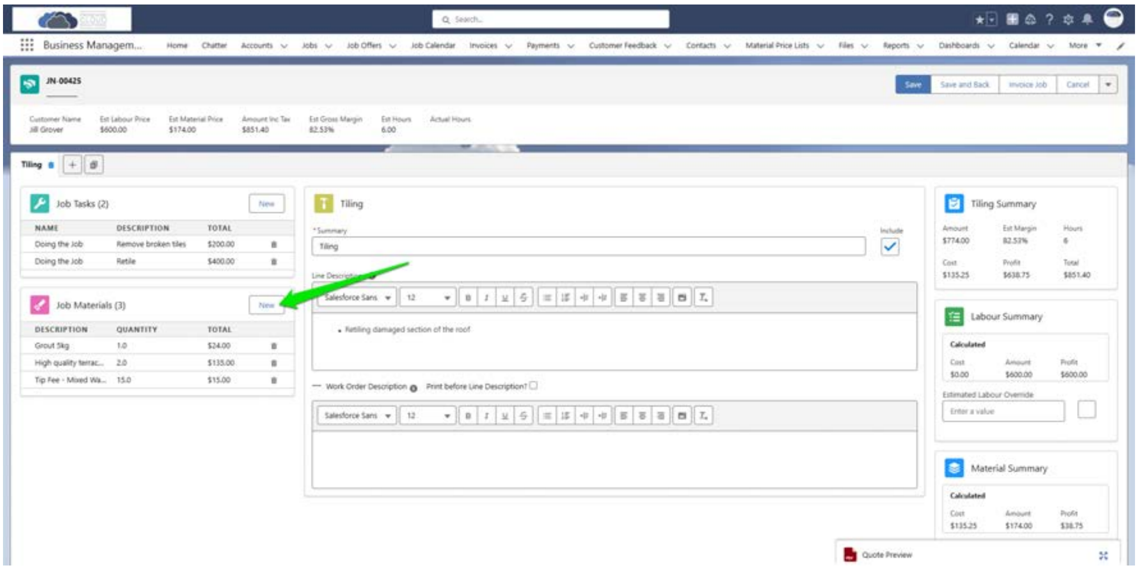
5. Remember to **Save** when you're finished.



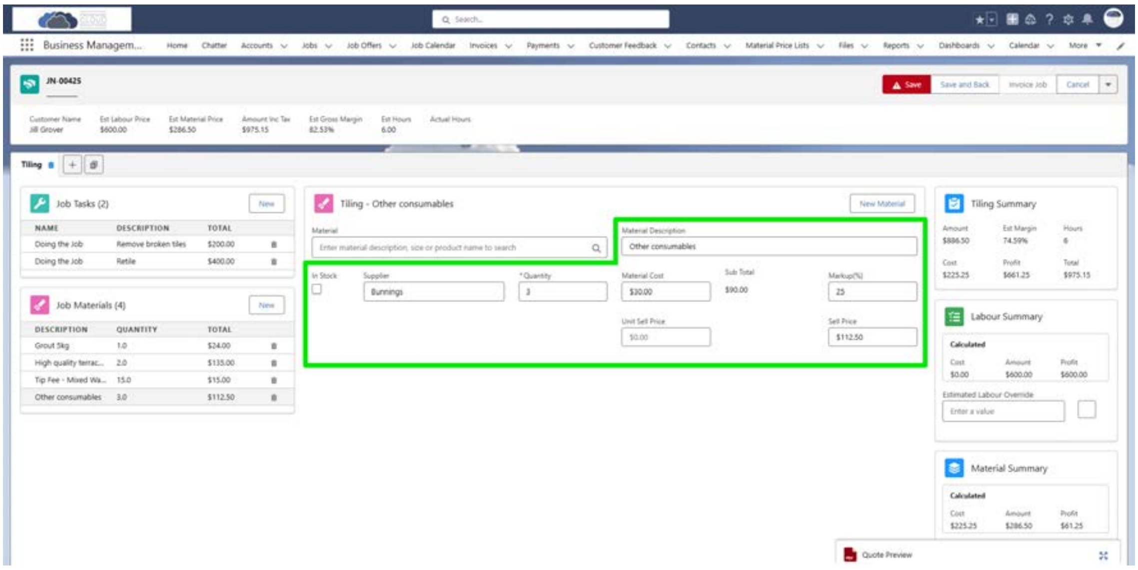
> If a product is not yet on a price list, you can add it to any price list you own, *See* "How to add a new material to a price list" on page cxlviii. You could also simply enter the material manually.

To manually add a material to a job line

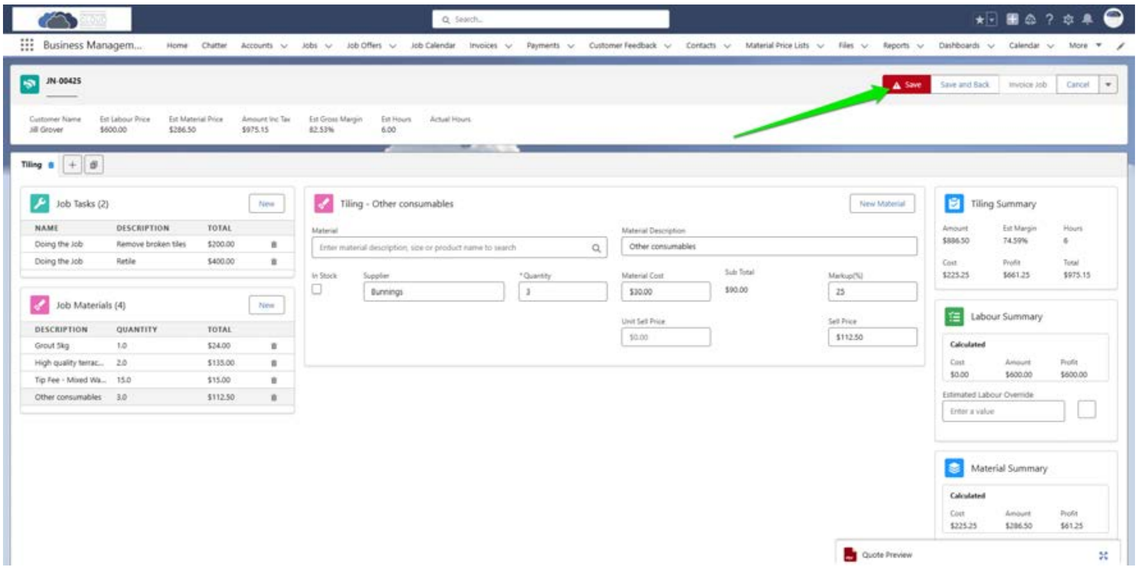
1. From the Job Materials list, press **New**.



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



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



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

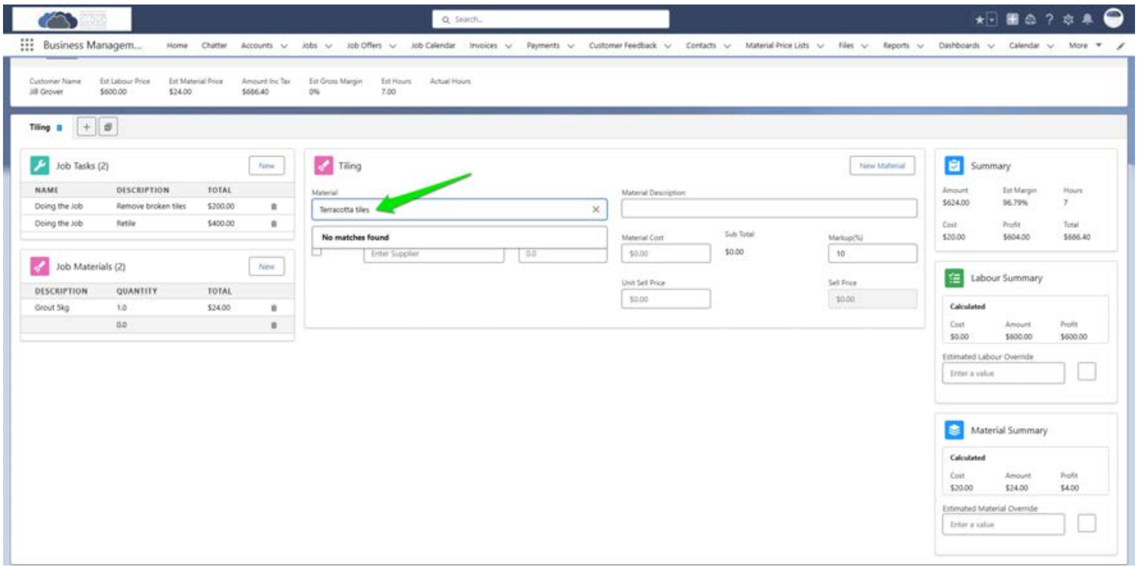
How to add a new material to a price list

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

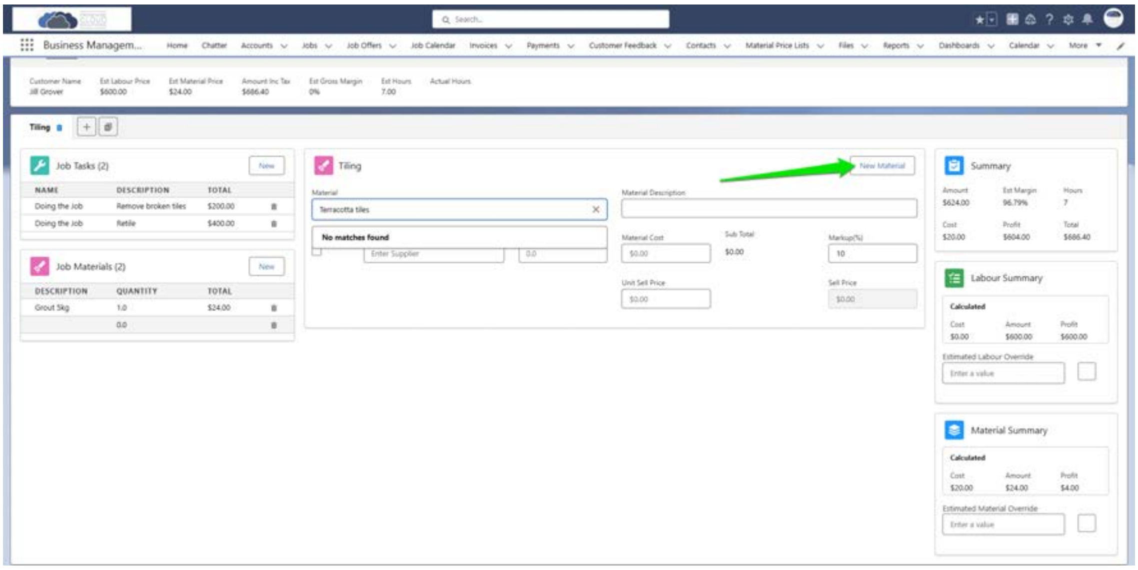
> When you add a material, you need to add it to an existing Material Price List that you own. You may need to create your own Material Price List prior to adding a new material. *See* “Creating a material price list” on page cdxviii.

To add a new material to a price list

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

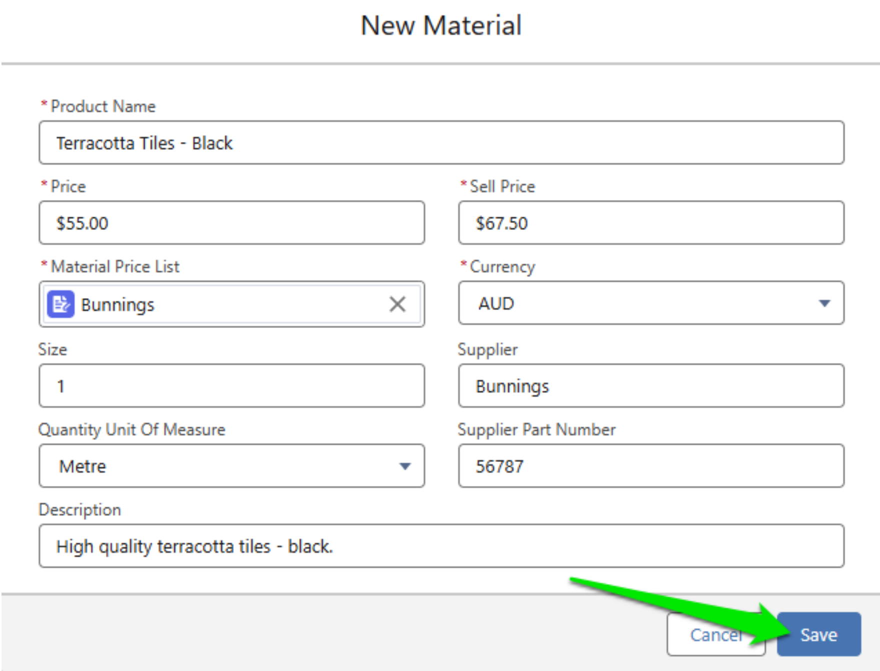


2. When the material is not found, press **New Material**.



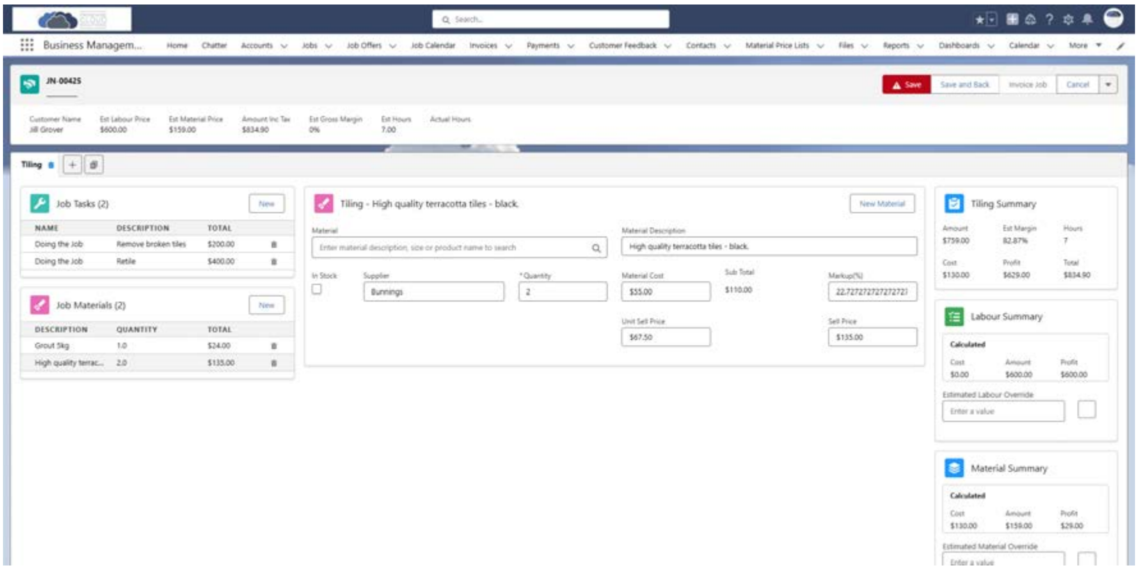
The **New Material** dialog box appears.

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

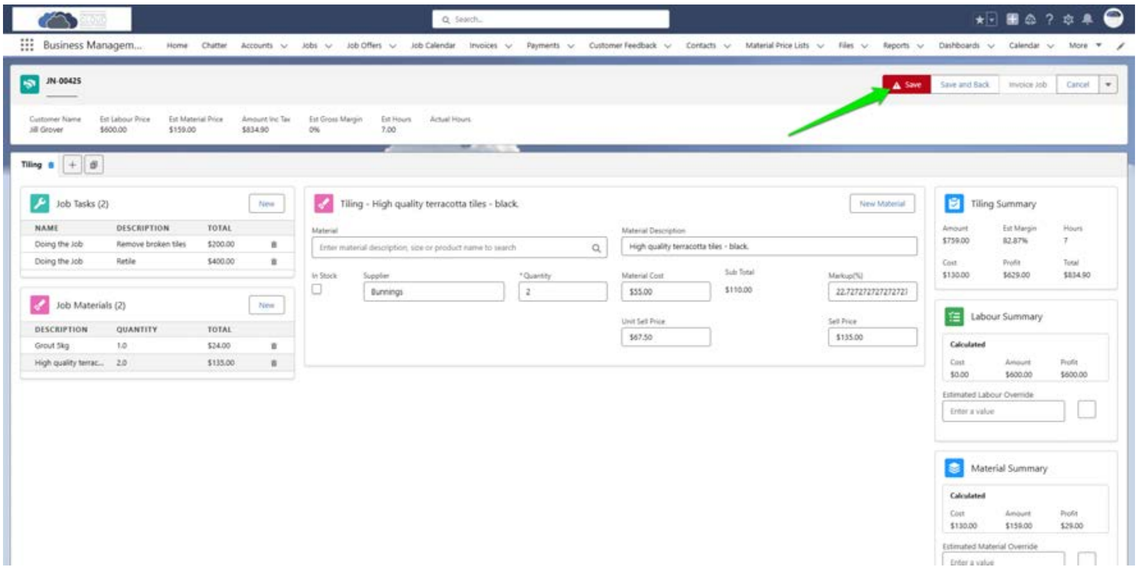


The new material is added to the list and selected within the job plan.

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



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

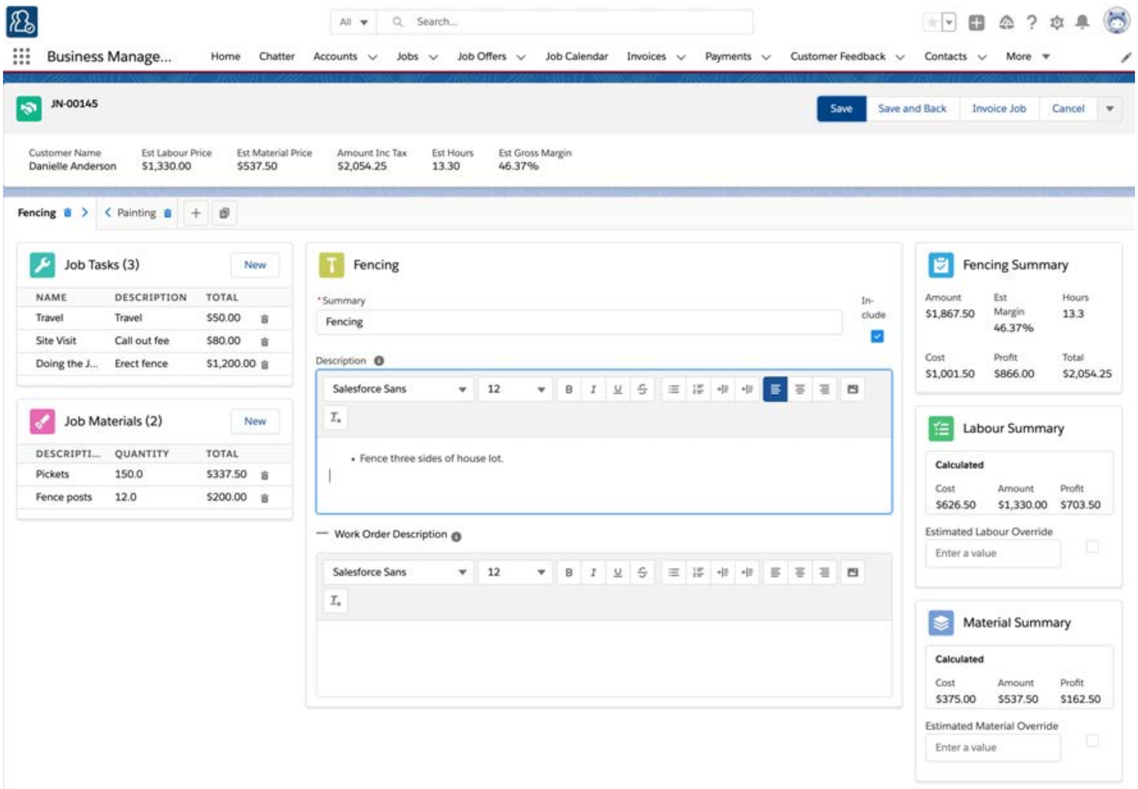


How to add an image to a line item

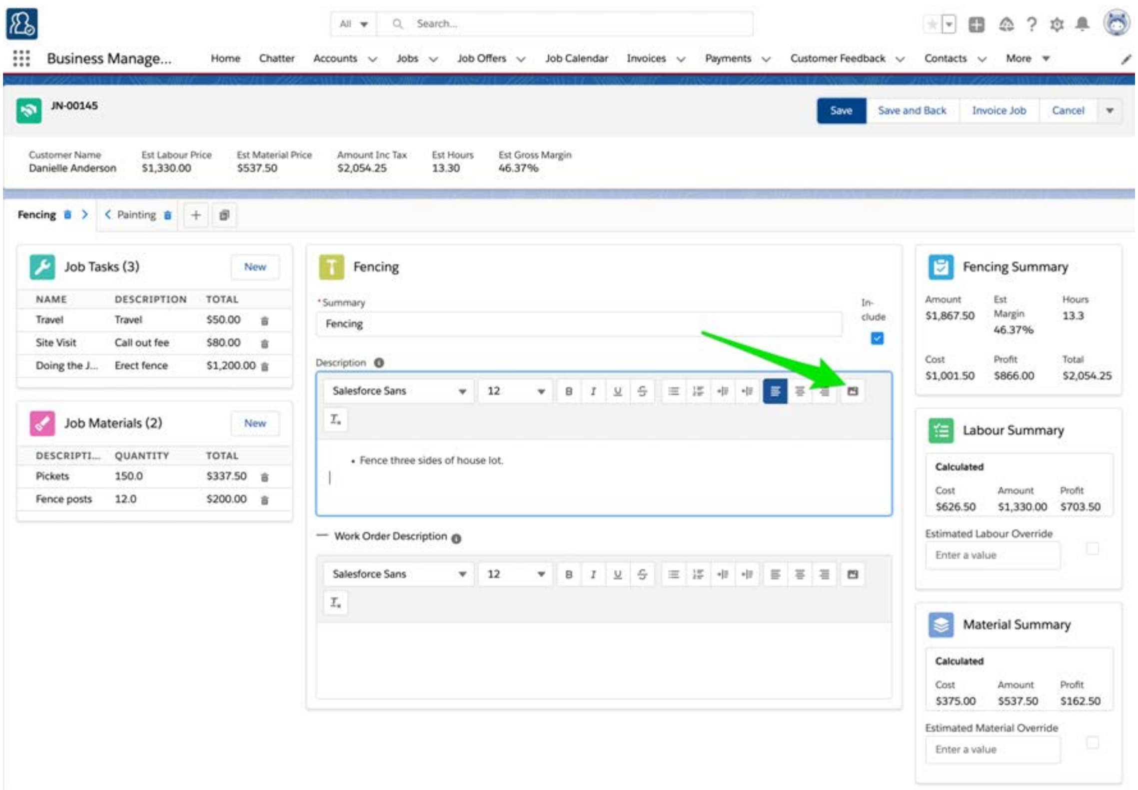
To use photos within your quotes or invoices, you can add them to specific line items within the Job Plan.

To add a photo to a line item

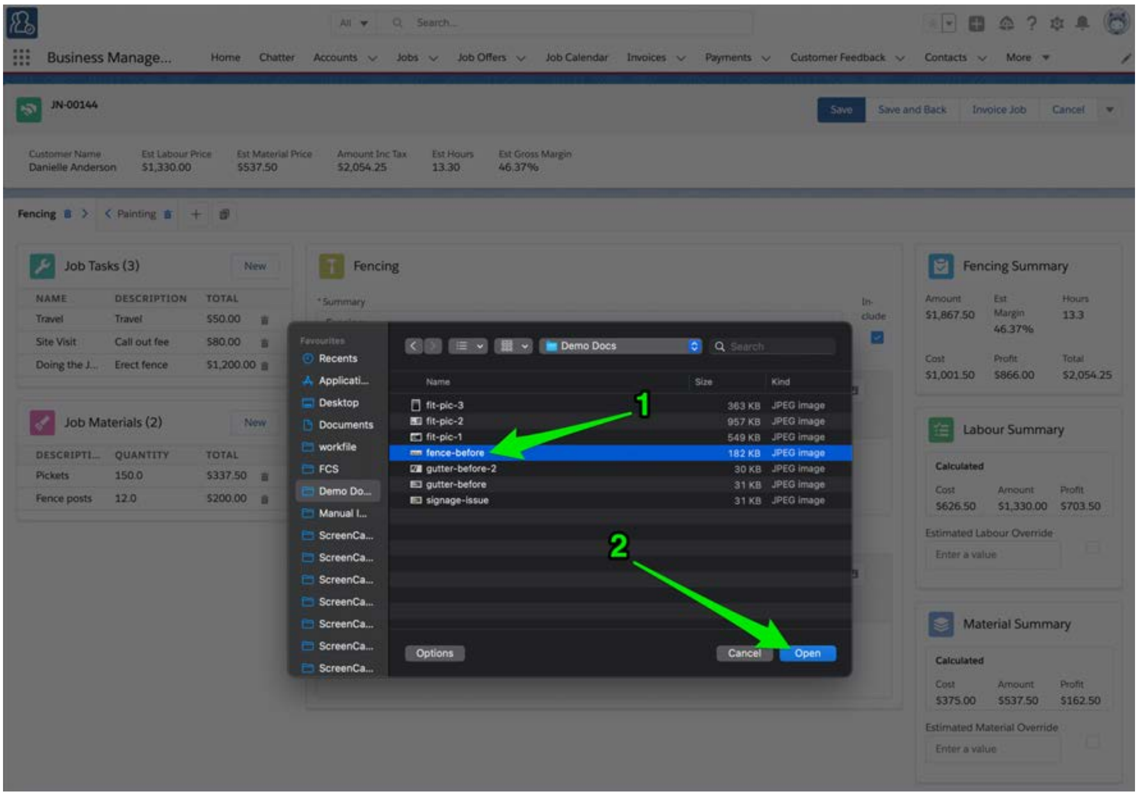
1. Place your cursor in the `Description` field at the place you want the image to appear.



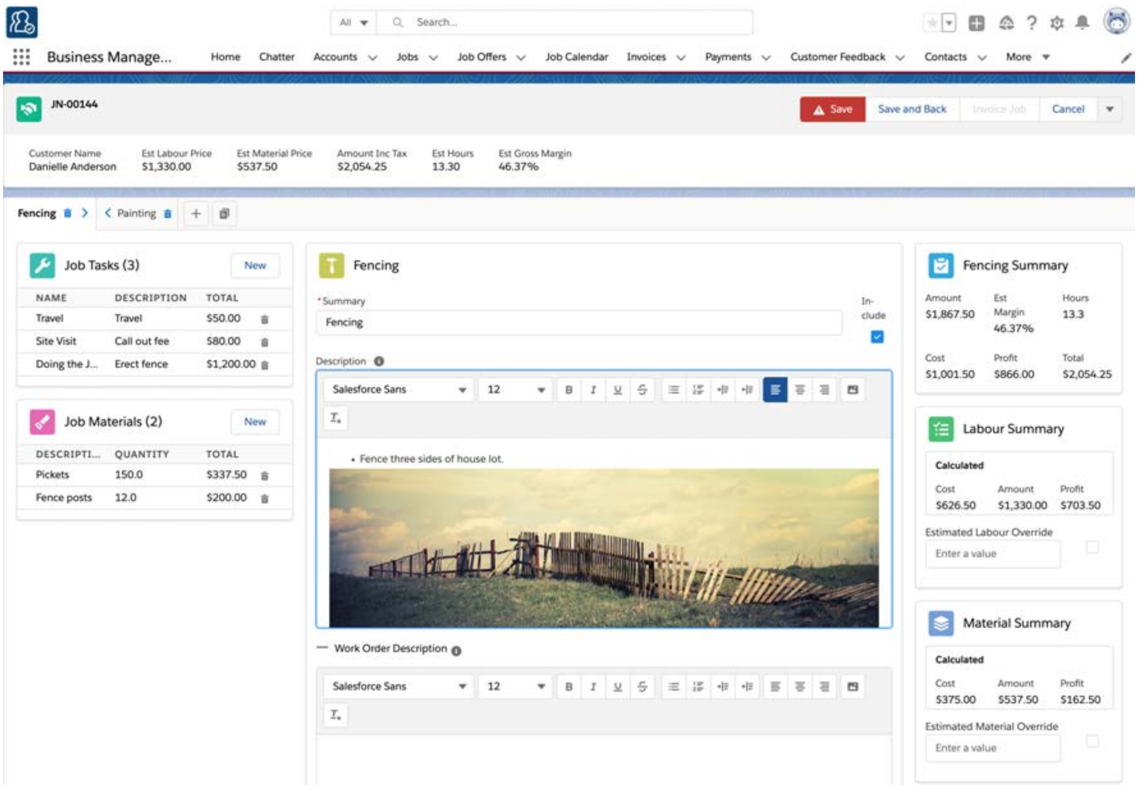
2. Press the image button.



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

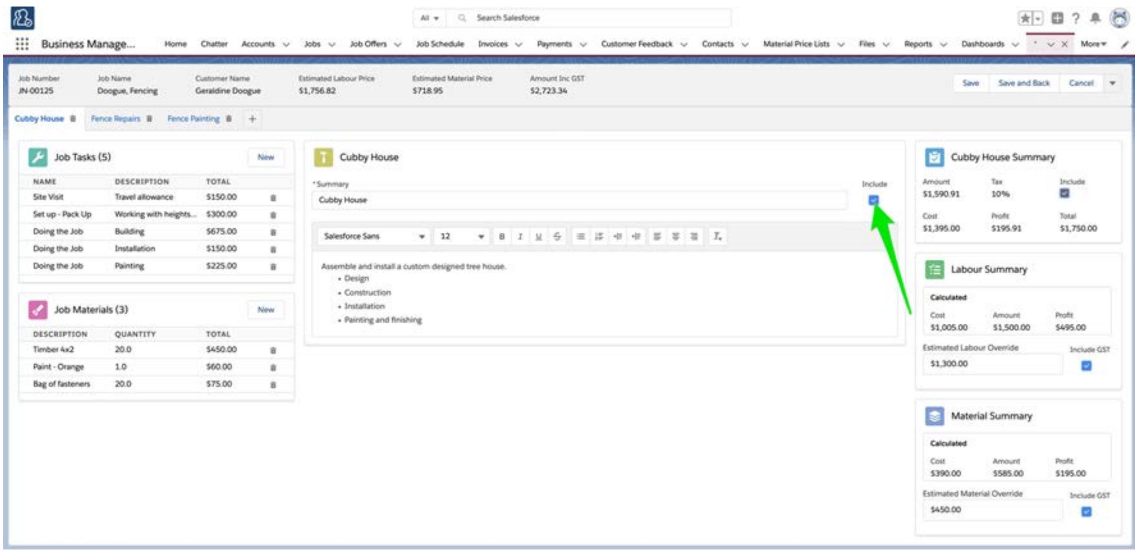
You can include or exclude individual quote lines on a Job Plan.

> 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.

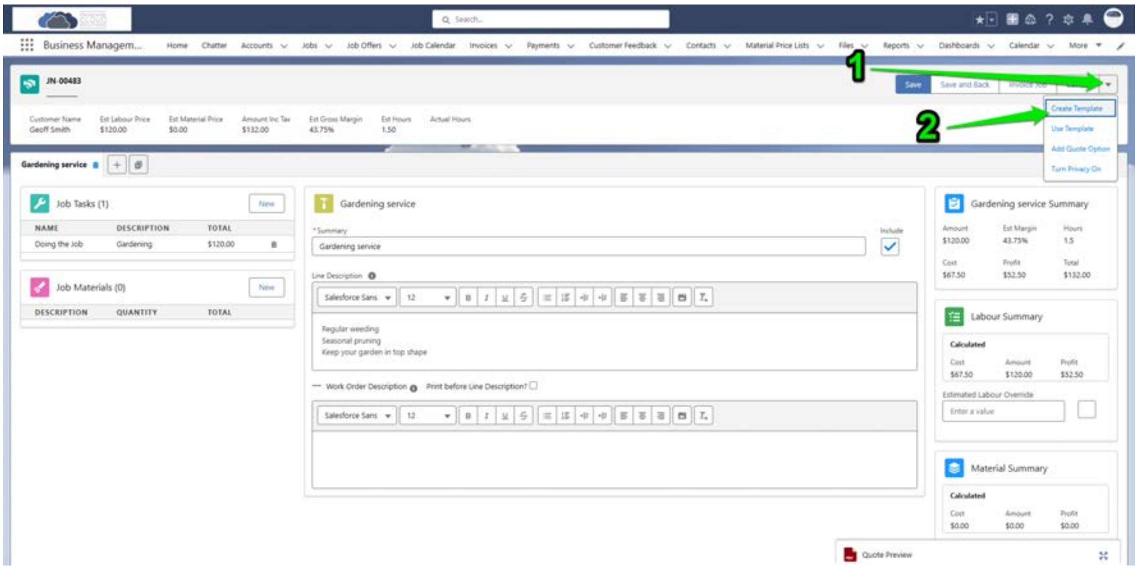
You reuse job plans by

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

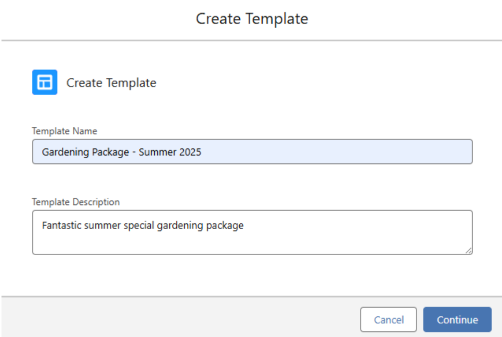
To create a new job template

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**.

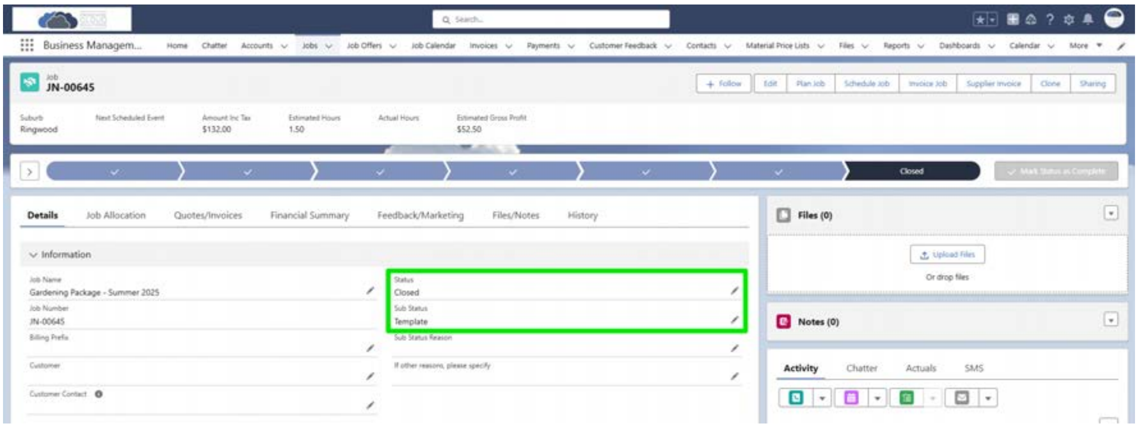
   

2. Name and describe the template, then press **Continue**.

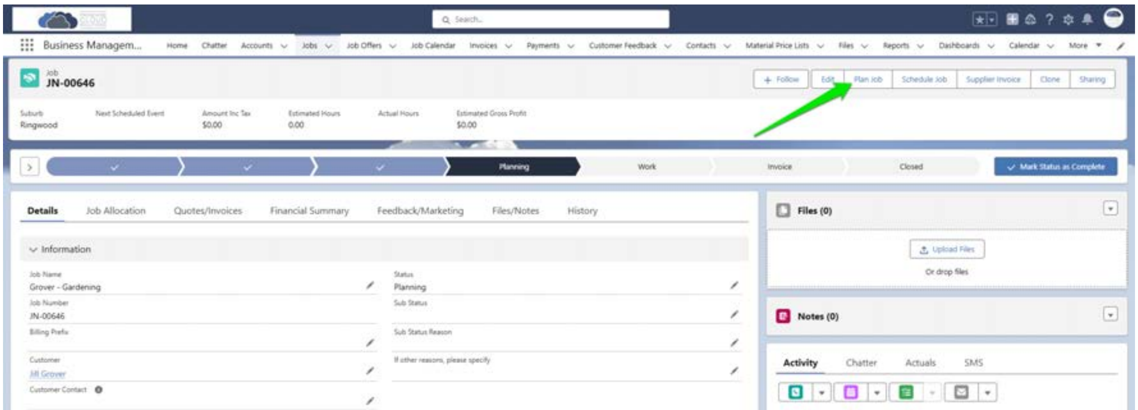
   On pressing **Continue**, the system creates the job plan within a new Job whose `Status` is *`Closed`* and `Sub Status` is *`Template`*.

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

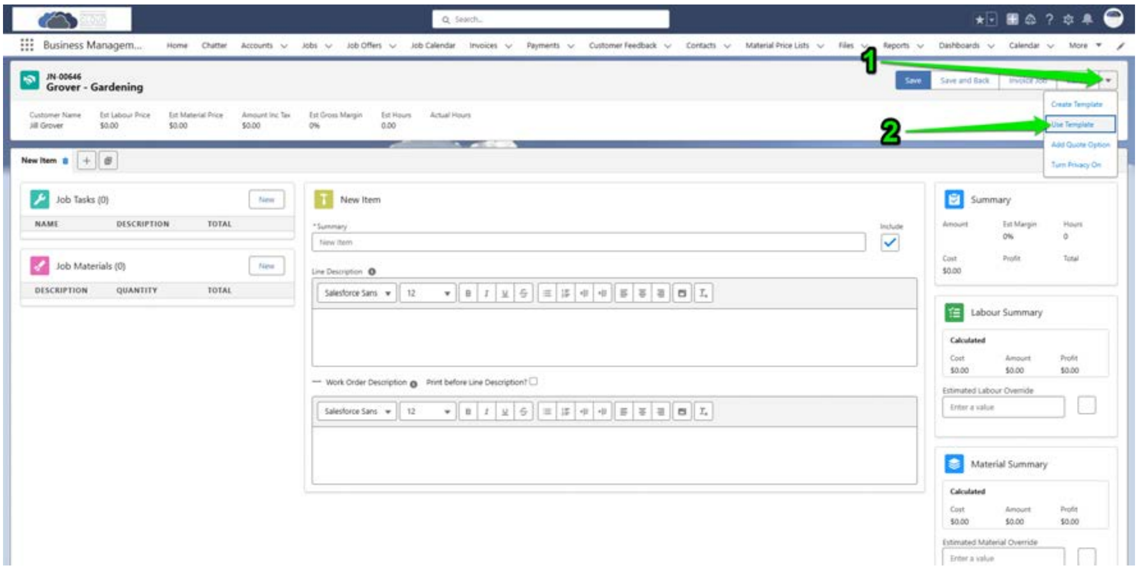


To use a job template

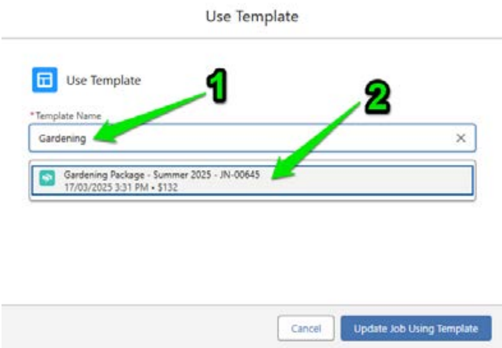
1. From a new job, place the job into the **Planning** status, then press **Plan Job**.



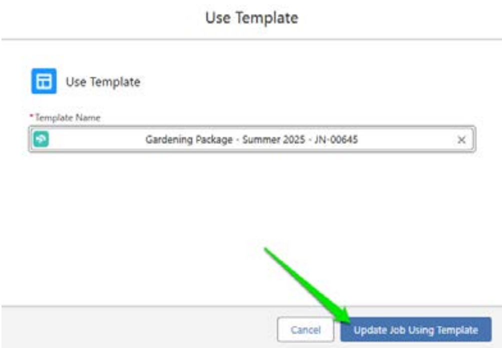
2. From the new job plan, press the **More** button then **Use Template**.



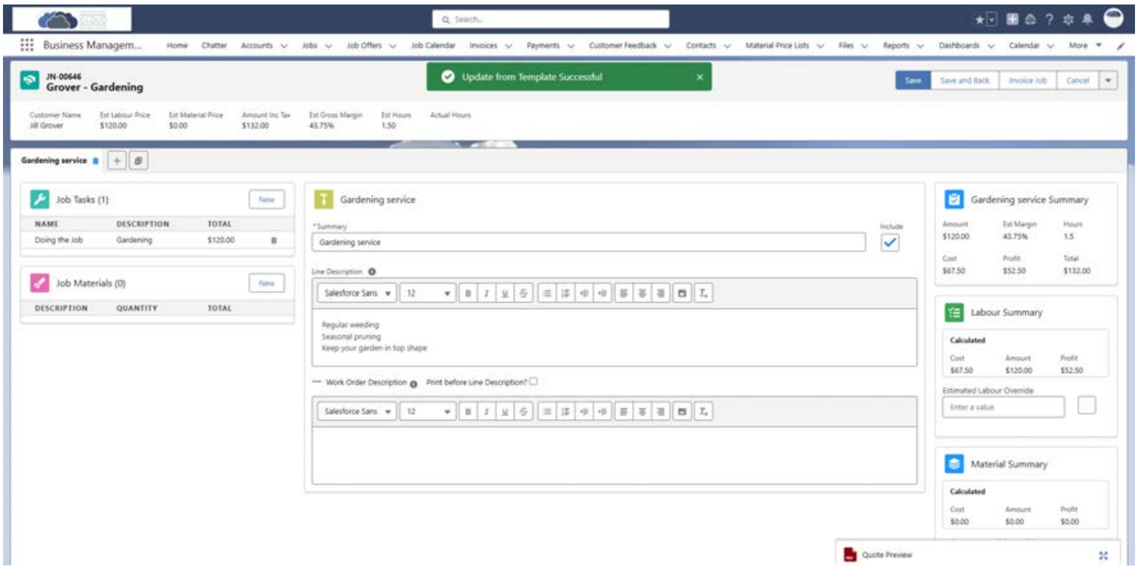
3. Search for the template by name or number, then select the template from the search results.



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



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



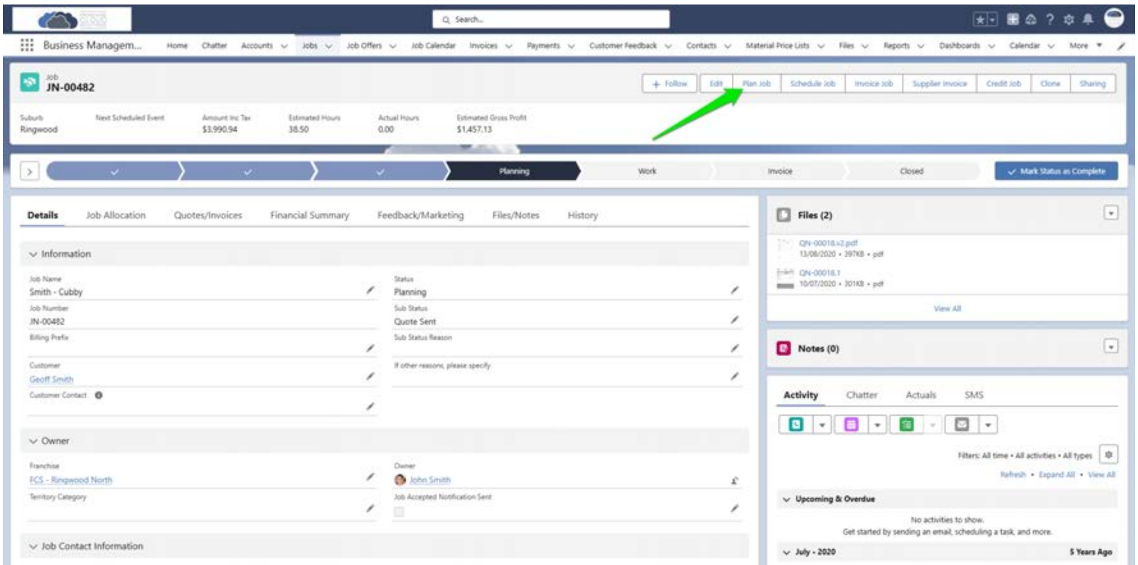
Having applied the template, you can now edit the job plan to suit.

How to send a quote

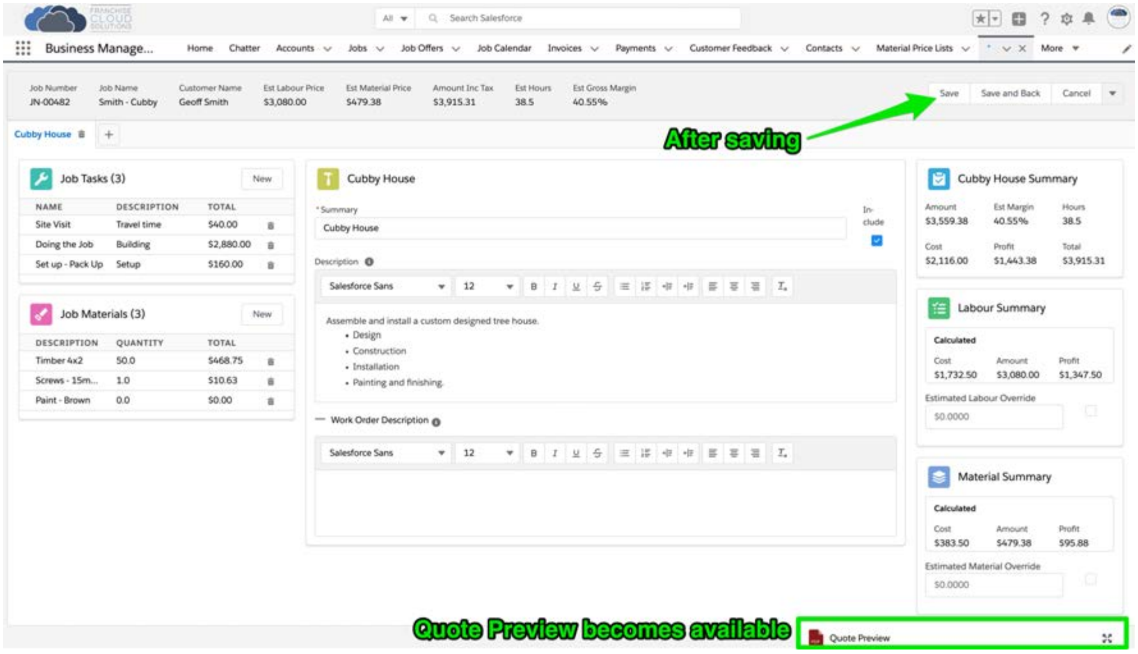
For installations using Nextdoc, you can send quotes from the Job Plan page.

How to email quotes using Nextdoc

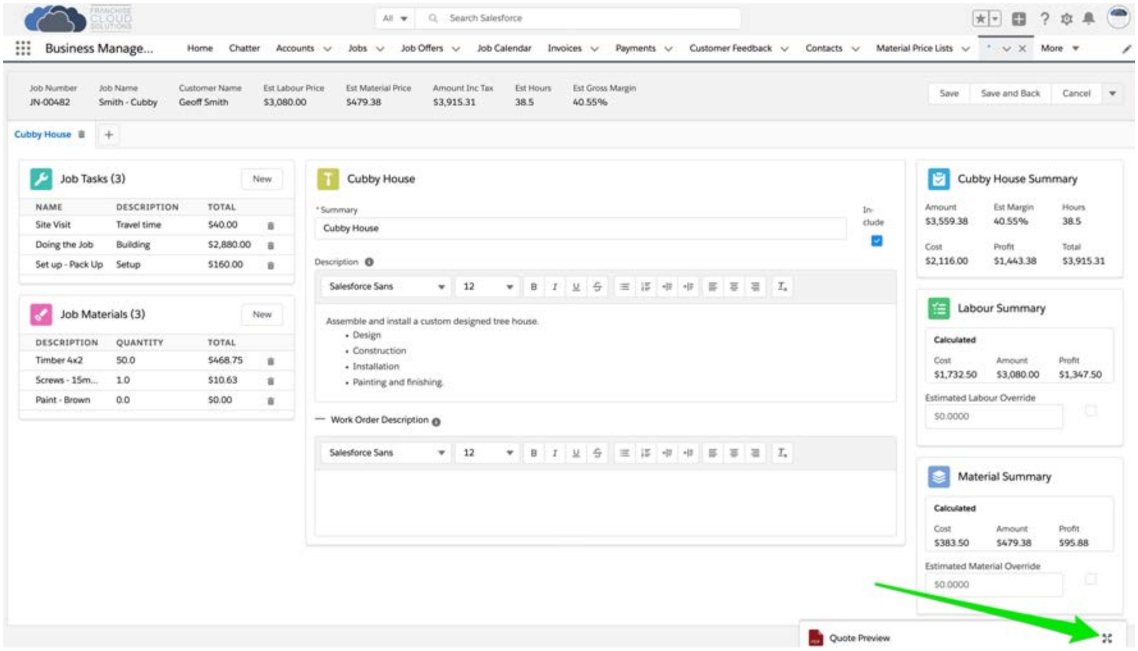
1. Generating a quote has been incorporated into the Plan Job page. To plan a job and generate a quote, select **Plan Job**.



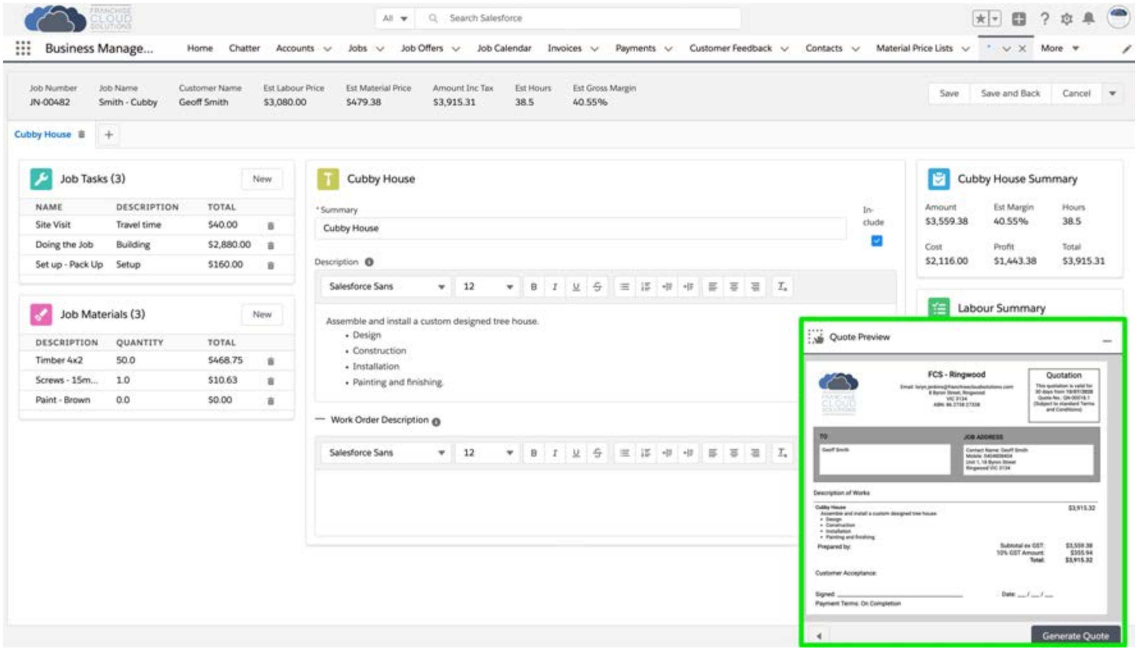
2. The Plan Job page has a Quote Preview window. Quote Preview updates as soon as the Job Plan is saved, showing you exactly what the quote looks like.



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

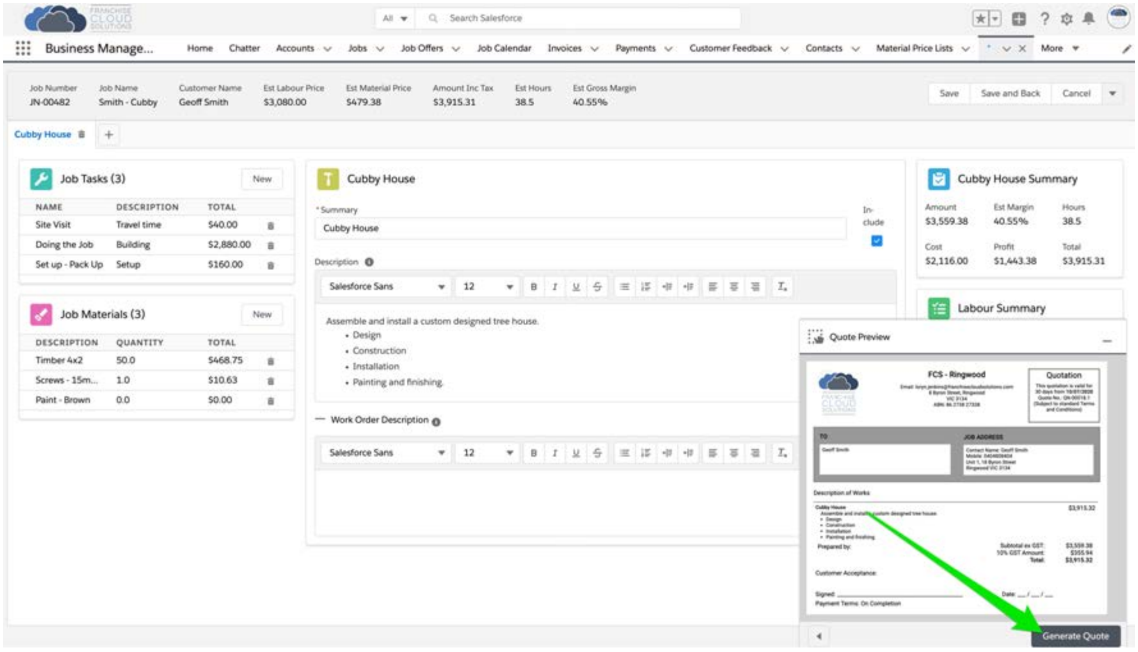


4. Now you can see the dynamically-generated quote preview.

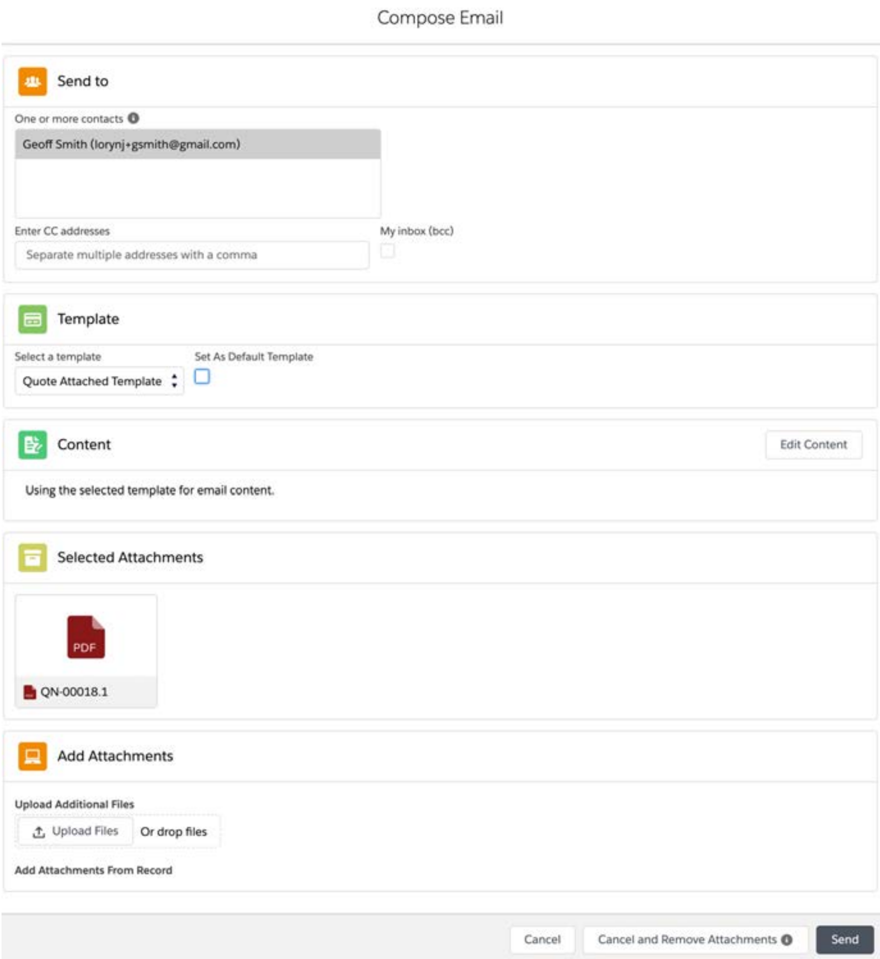


5. Every time you **Save** the job plan, the **Quote Preview** is updated.
6. Complete the Job Plan as per normal.

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



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



- 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

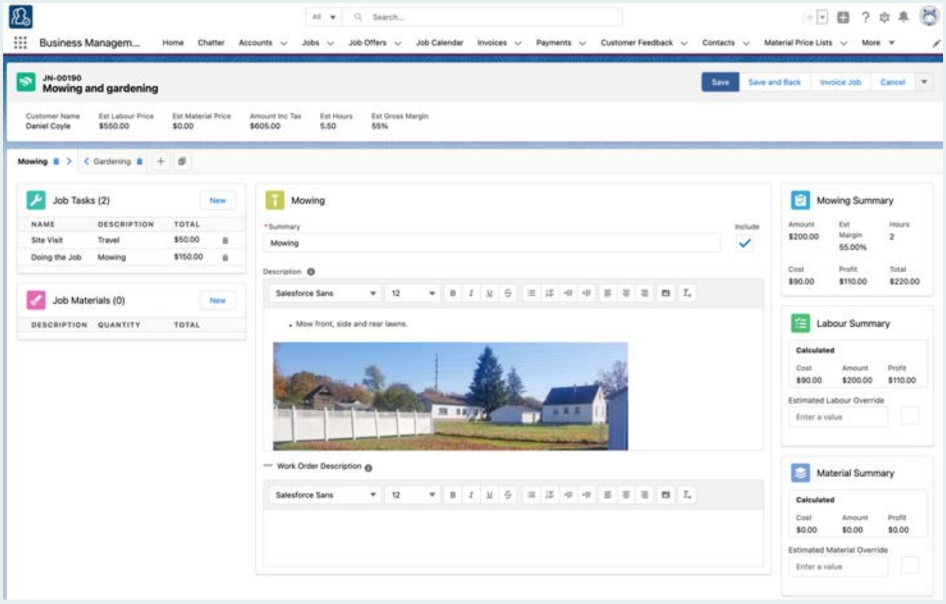
Sometimes we want to provide the customer a quotation containing options. Perhaps the customer wants to decide between the tile or smokey glass splash-backs. Or, perhaps they're wanting to choose between just the mowing service, or an option to include gardening as well.

> 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.

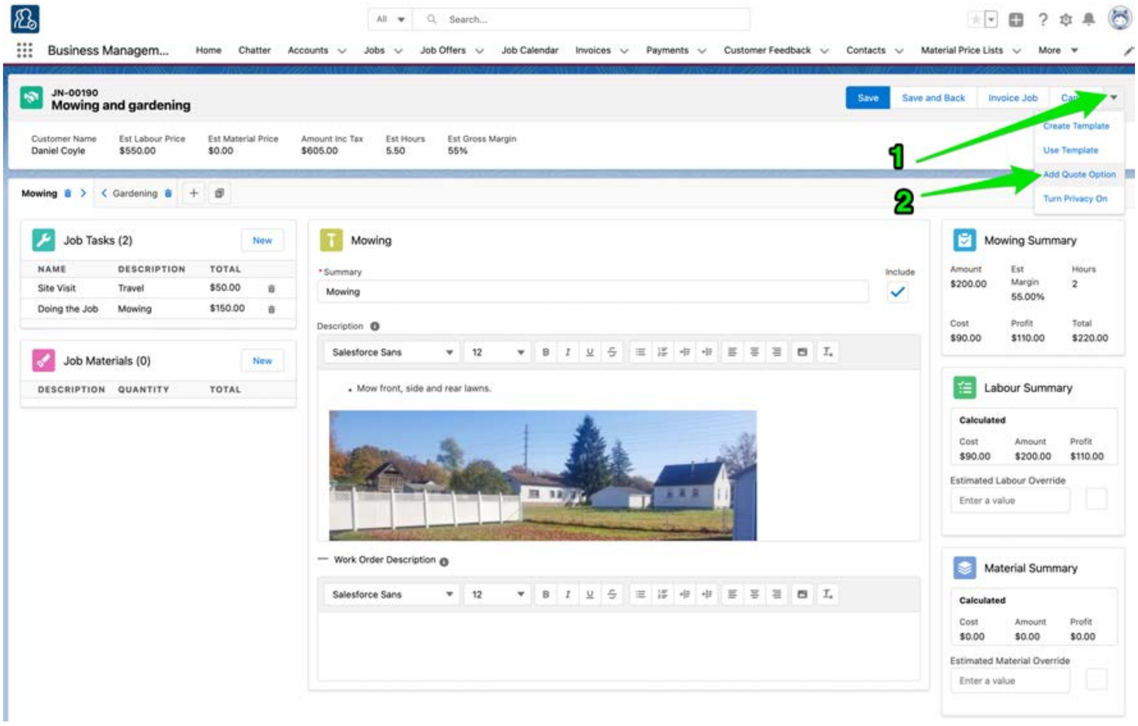
Here's our starting point:



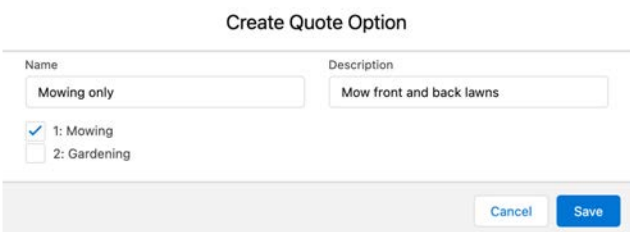
Let's now shape it into a **Job Plan** with options.

To add an option to a job plan

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

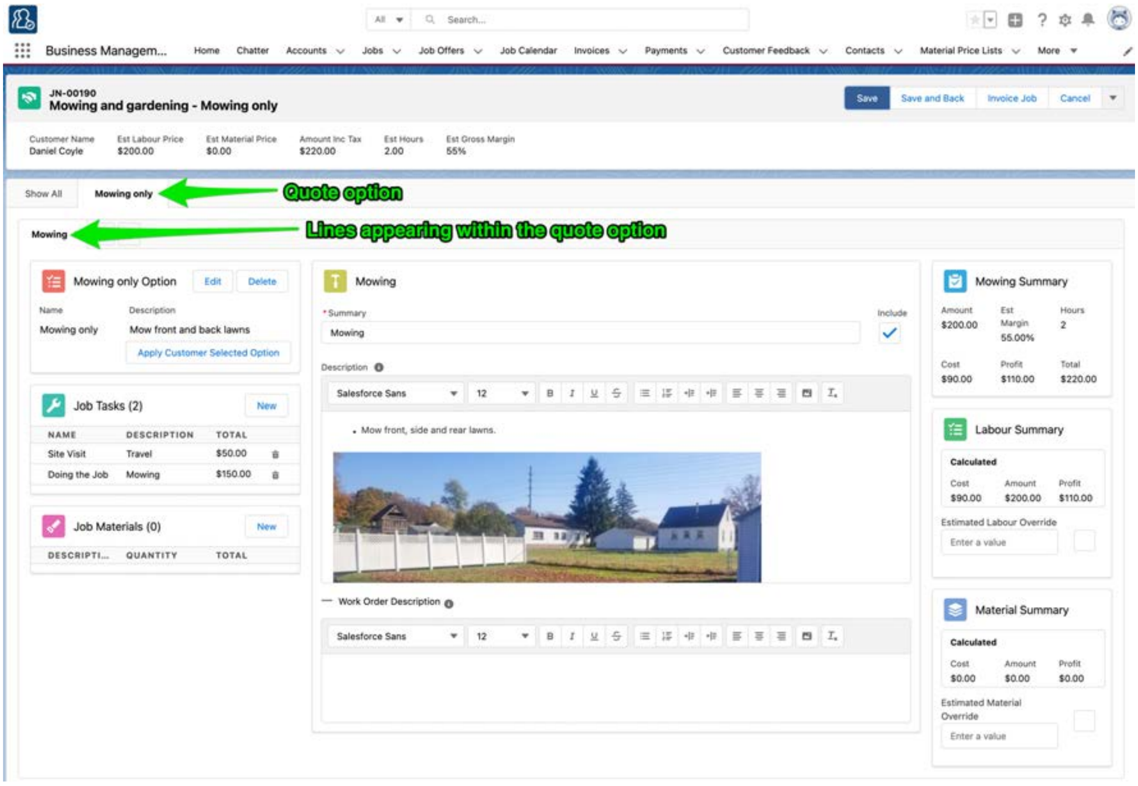


2. The **Create Quote Option** dialog appears. Enter a `Name` and optional `Description`, then select or deselect which lines will appear within this option. Press **Save** when you're finished.



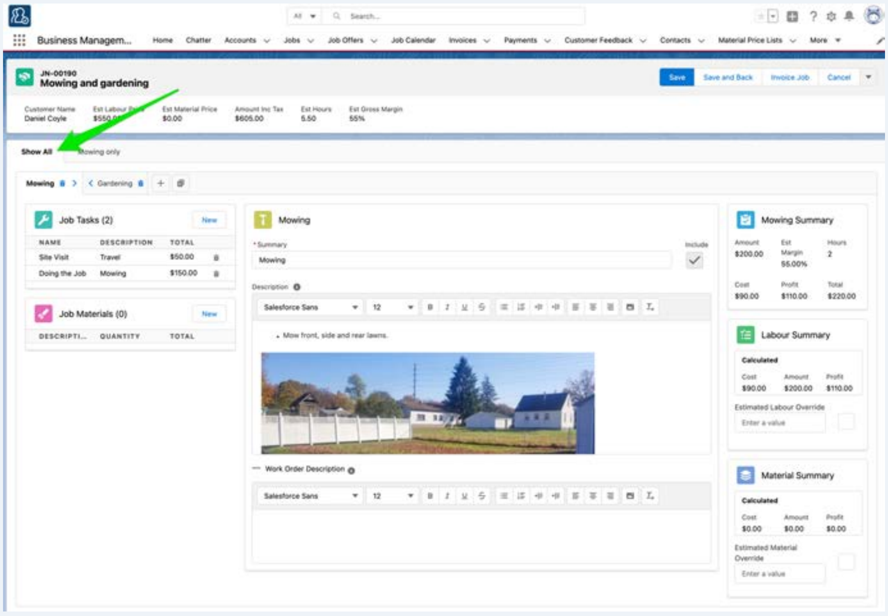
> What you enter into `Name` and `Description` will appear on the quote.

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.

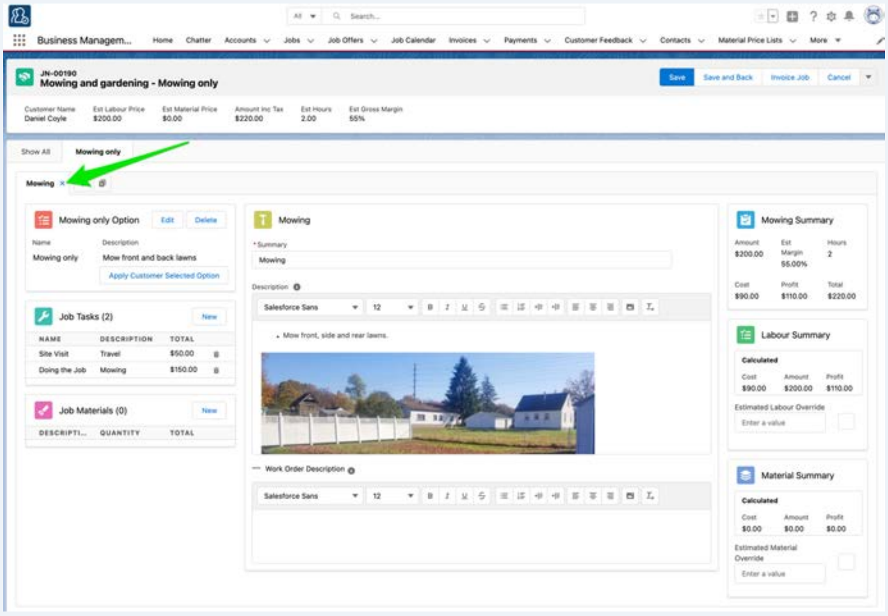


Now that you’ve added your first option, there are some things to note:

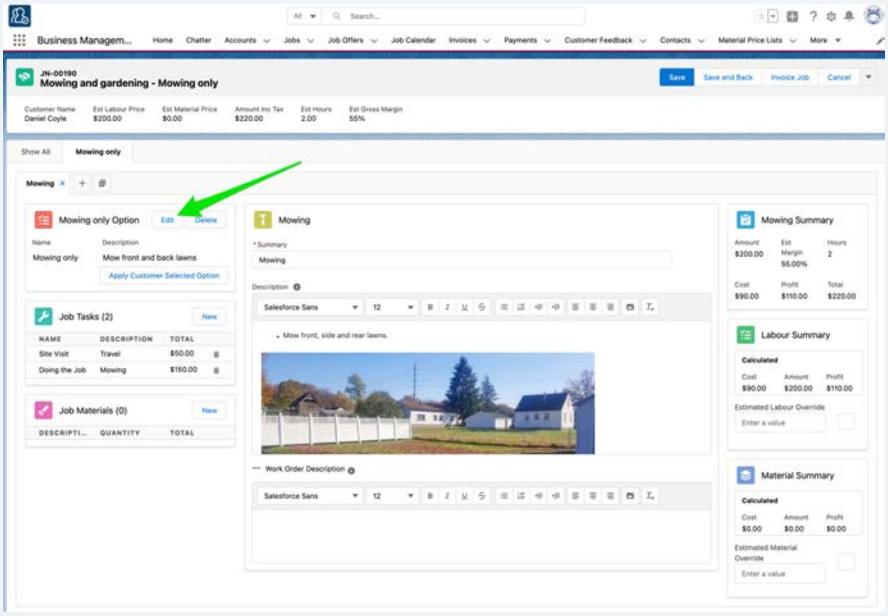
» You can always see all lines within the **Job Plan** by selecting **Show All**



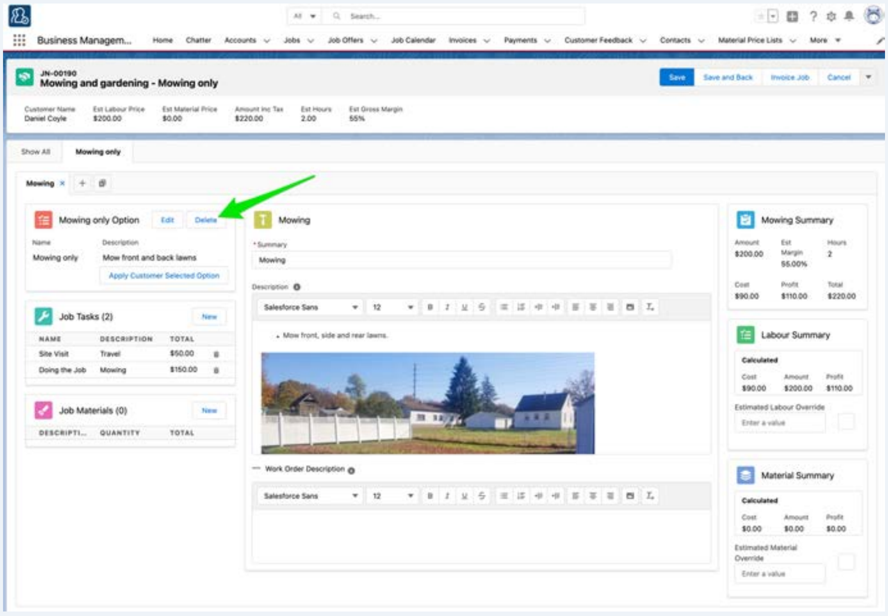
» You can remove a line from an option (without deleting it from the Job Plan) by pressing the x button



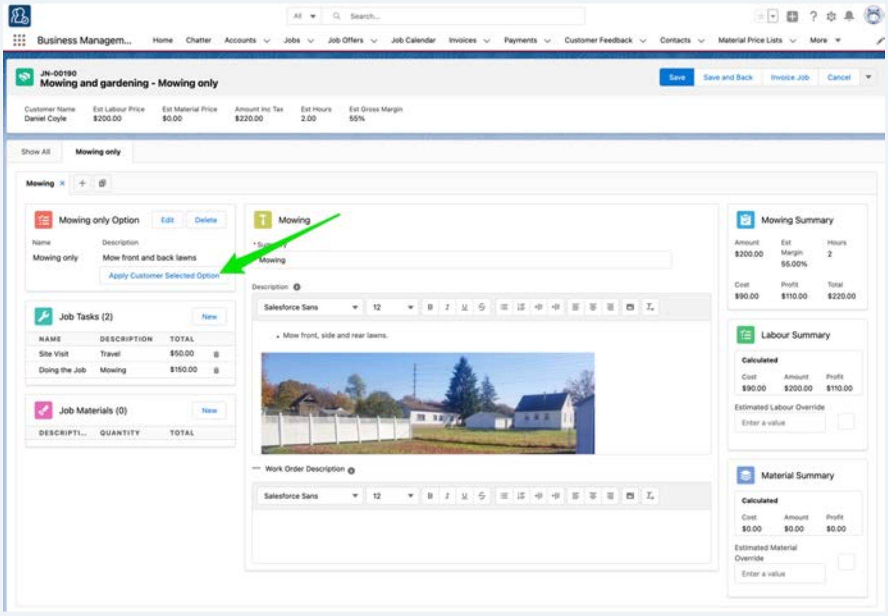
» You can edit the Name, Description or selected Lines within the option by pressing **Edit**



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

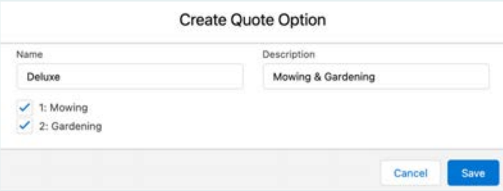


» When the customer selects this option, you indicate this by choosing **Apply Customer Selected Option**

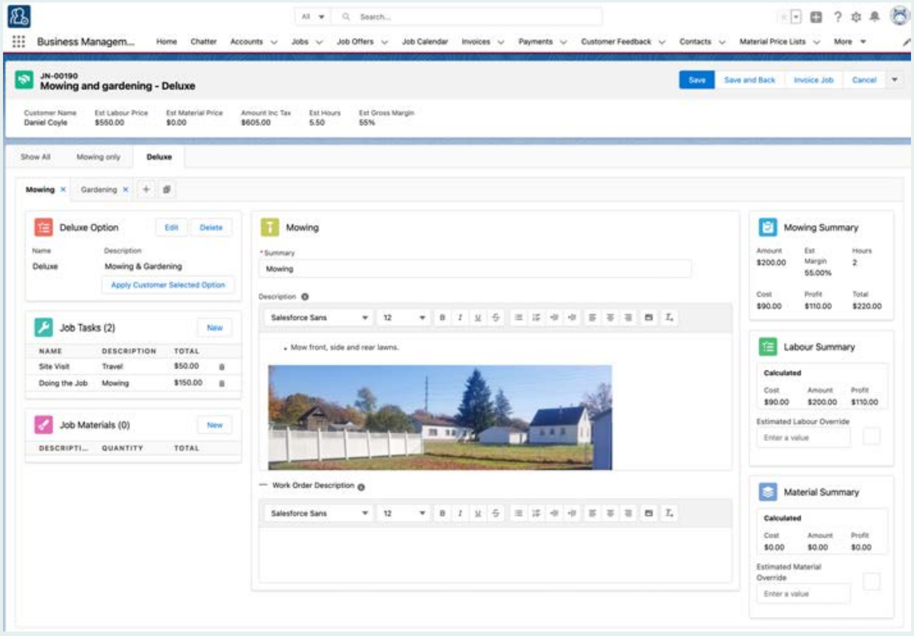


To add a second option, simply add another option to the job plan.

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



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



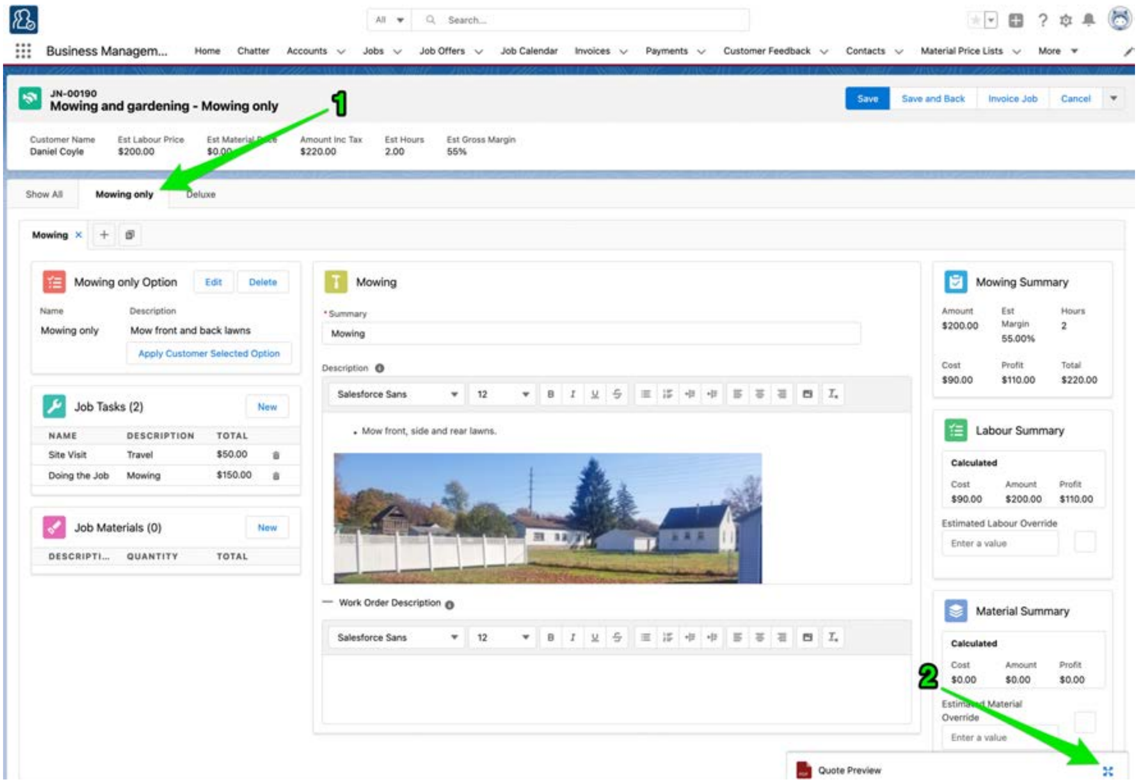
How to send an email containing multiple quote options

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

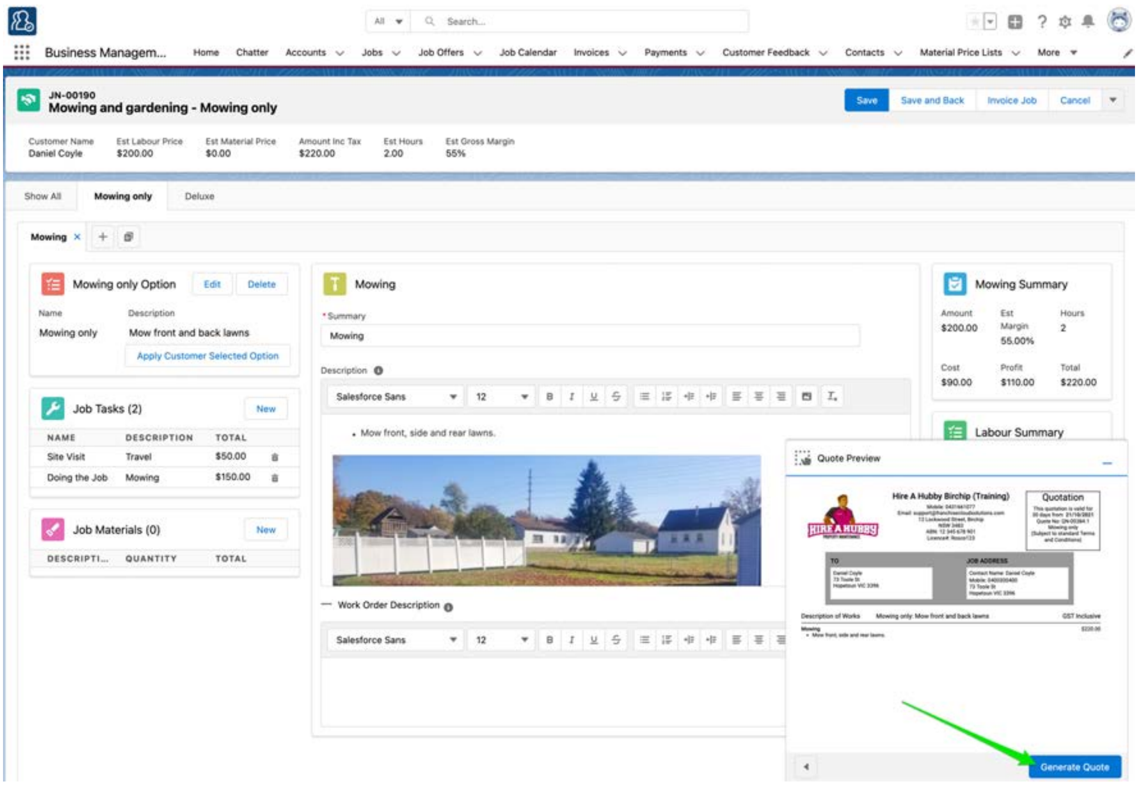
This topic builds on "How to create a quote with options" on page clxi. Make sure you read that topic first.

To send a customer a quotation with options

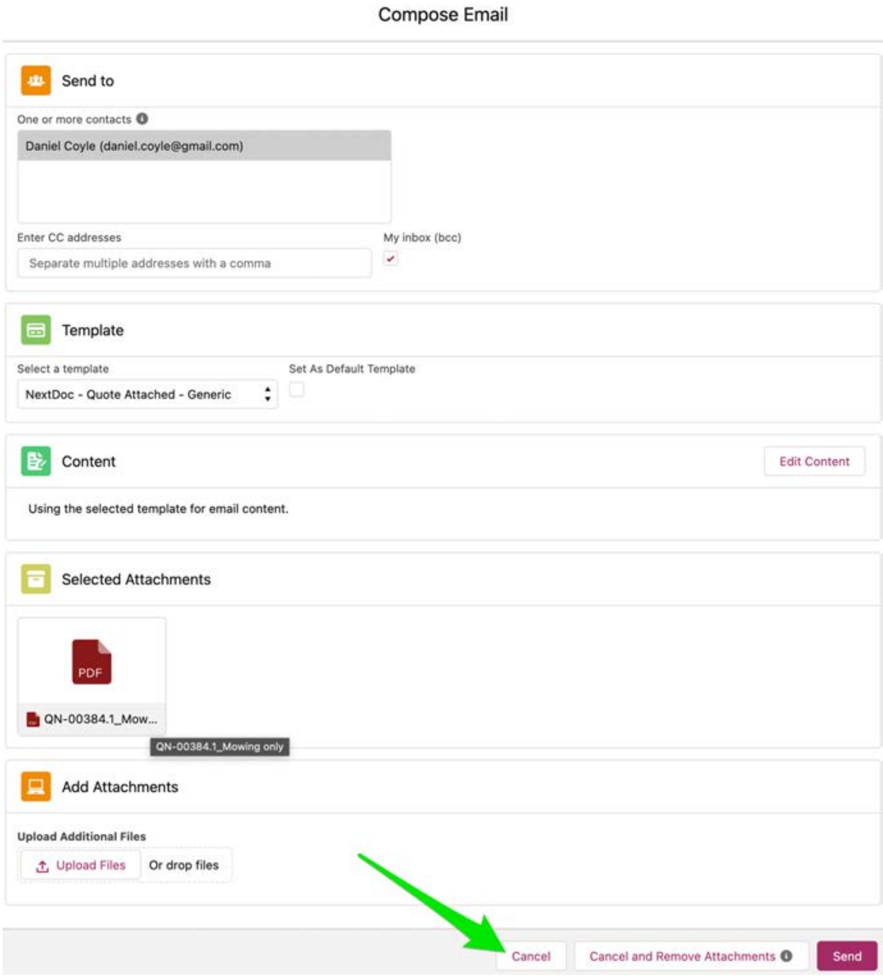
1. Select the first quote option, then press the **Quote Preview** expand button.



2. Select **Generate Quote**.

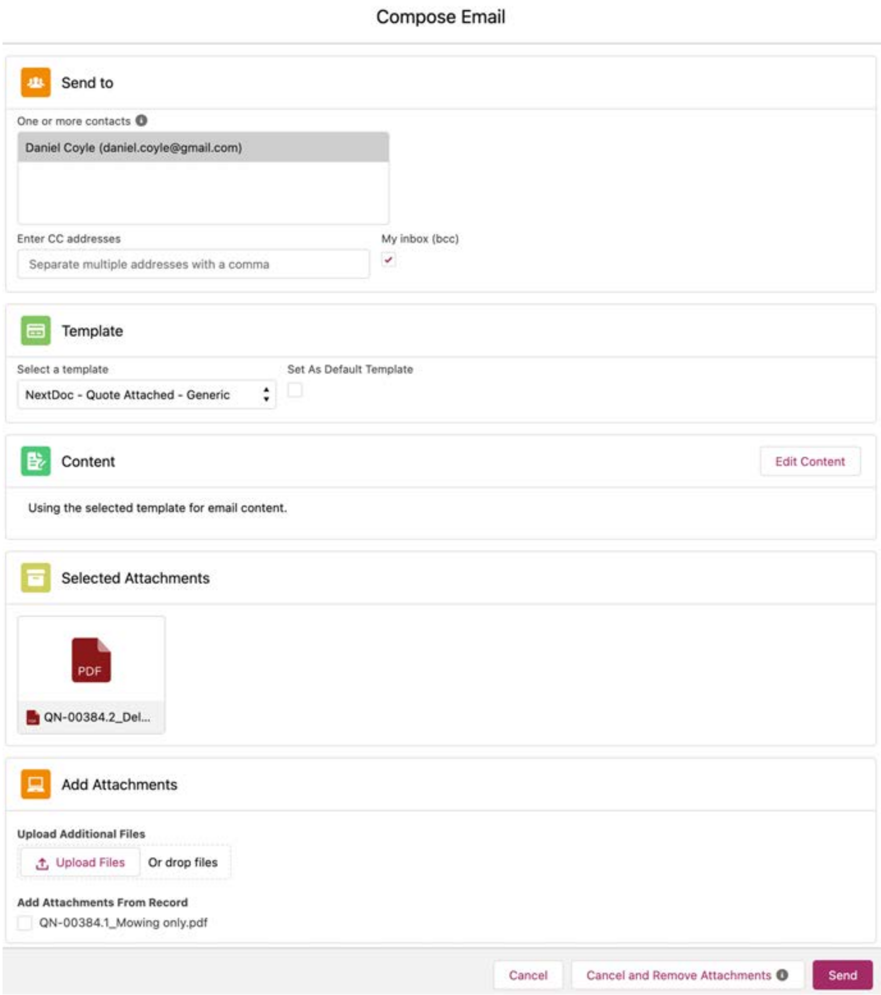


3. Allow the quote to finish generating, then press **Cancel**.

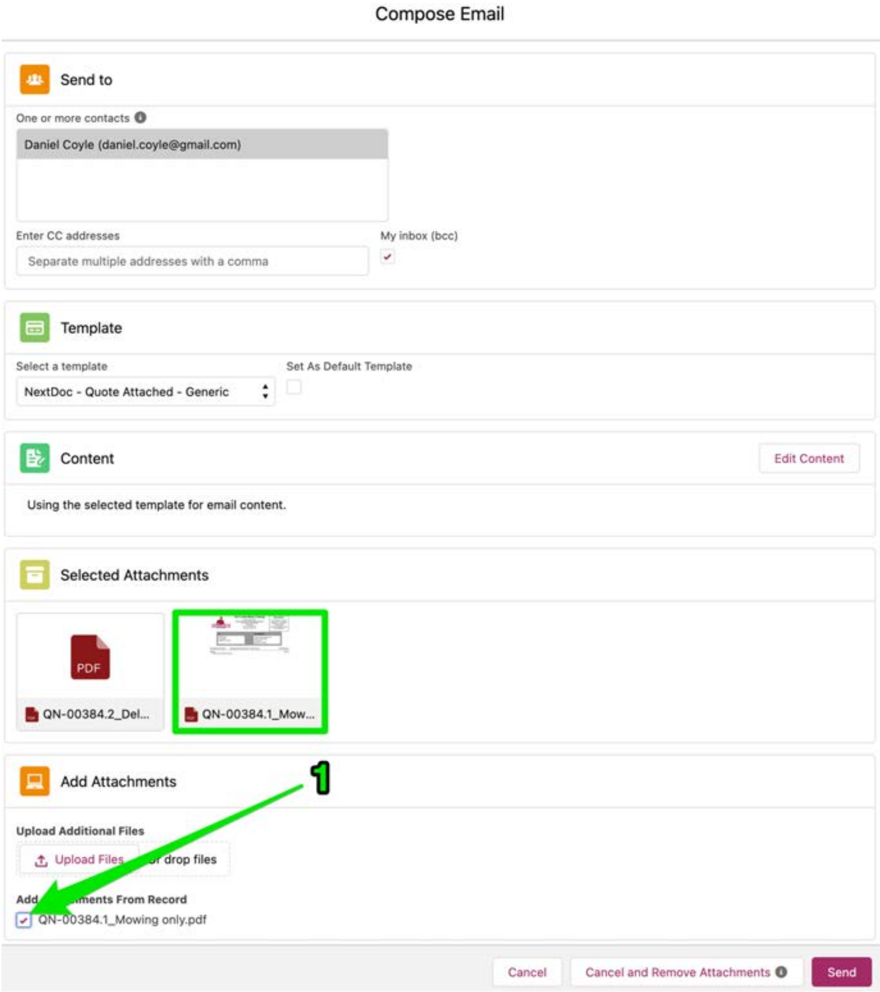


The generated quote is named using the quote option Name, and the generated PDF stored against the Job record. Now press **Cancel**.

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



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

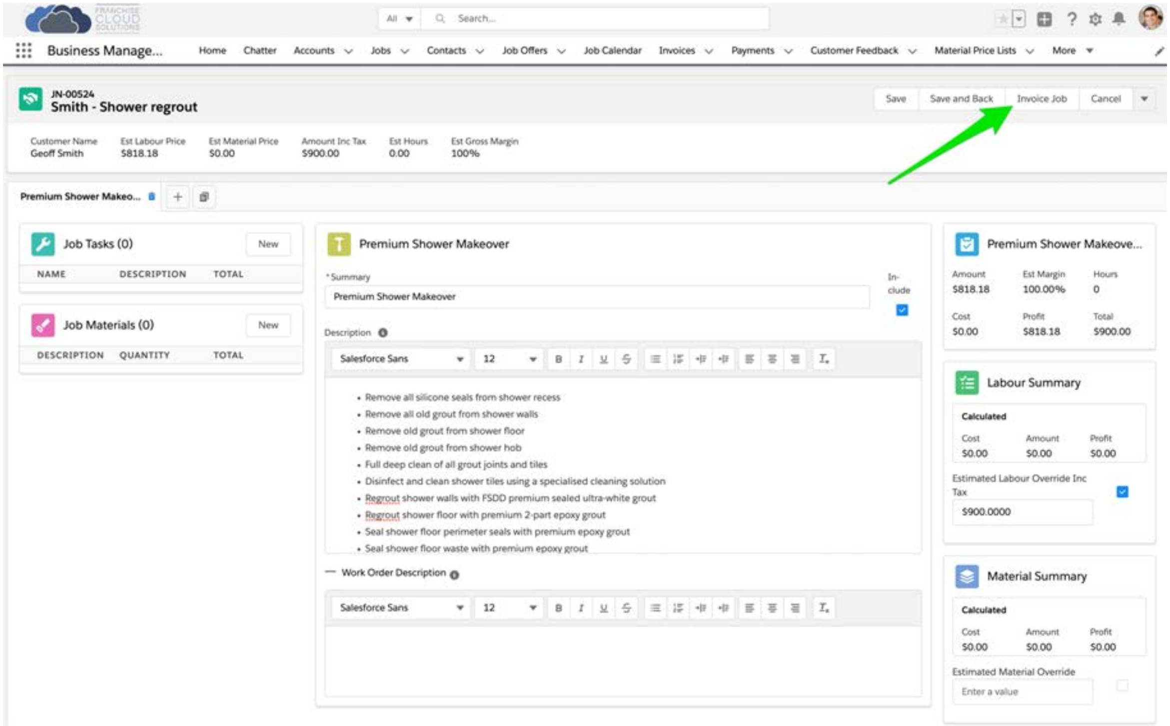


6. Now both quote versions are attached to the email. You can now adjust the recipients, accept or change the template, and adjust the content of the email as you normally would.
7. When you're ready, press **Send**.

> 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.



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

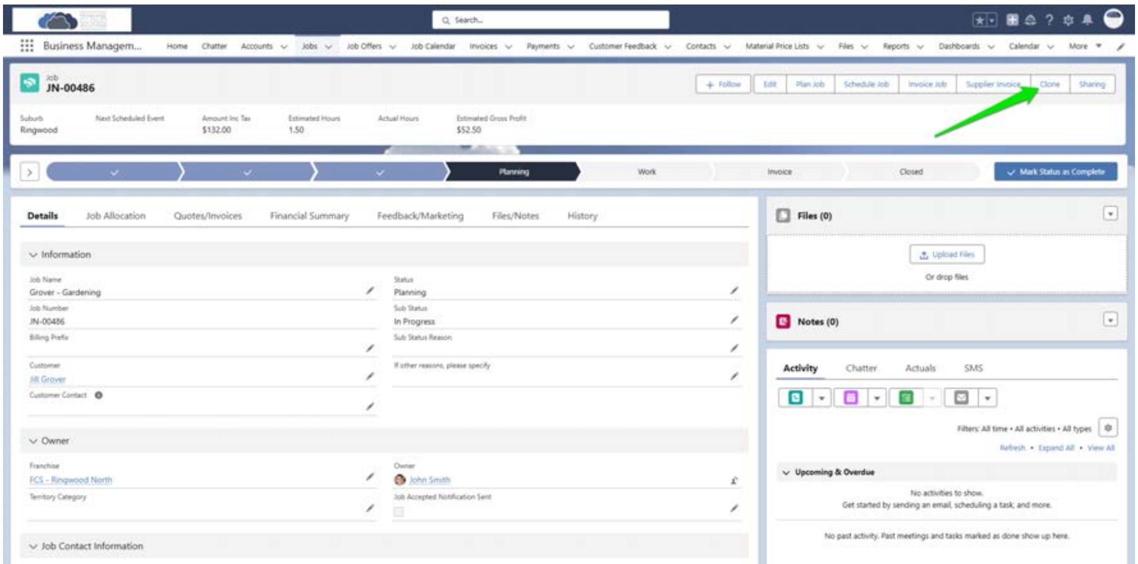
How to clone a job

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**.

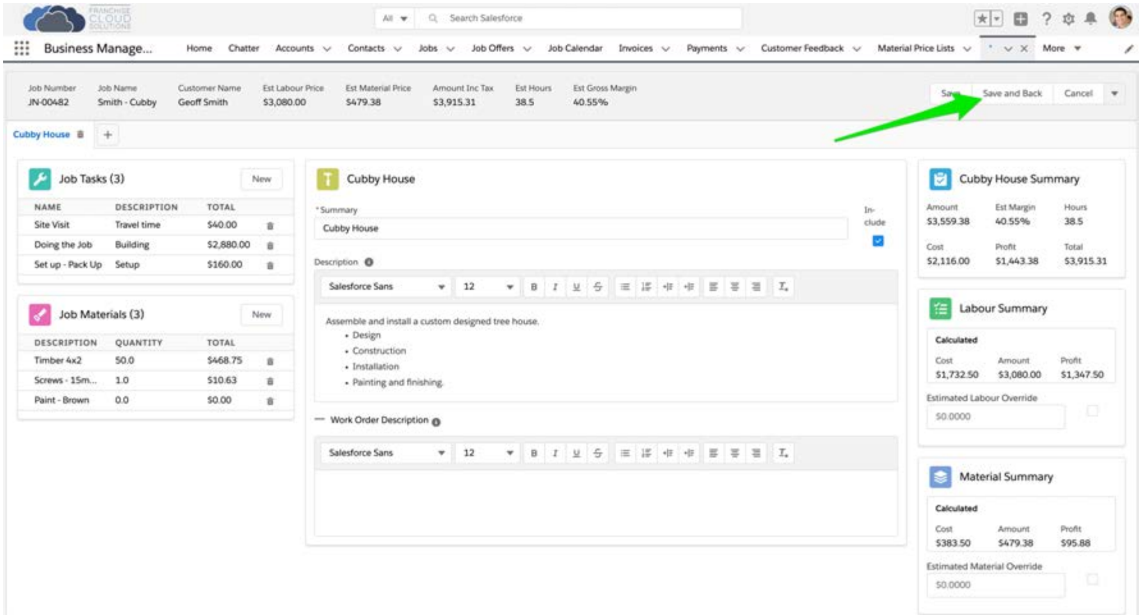
The system creates a new copy of the entire job, including the Job Plan. The cloned job is now ready for you to issue a quote or invoice.

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

How to return to the Job

To save and go back to the Job

» Press **Save and Back**.



The **Job** page displays.

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

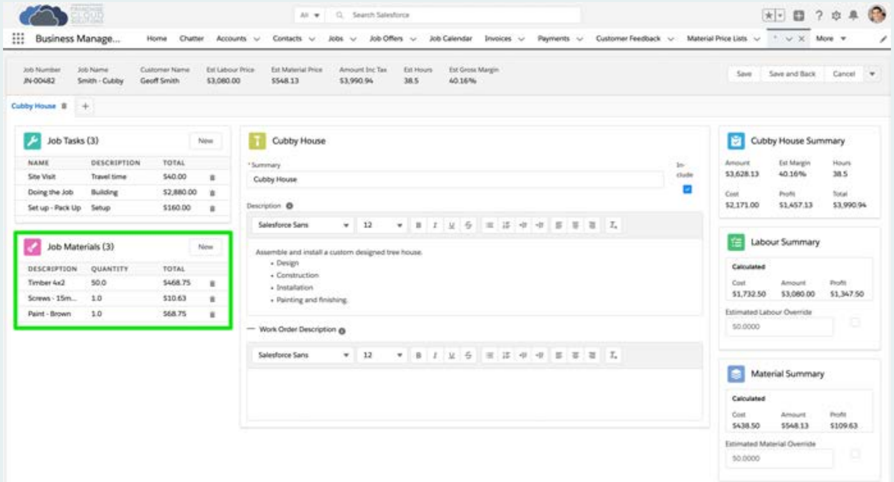
To return to the Job without saving

» Press **Cancel**.

How to print a materials shopping list

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

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



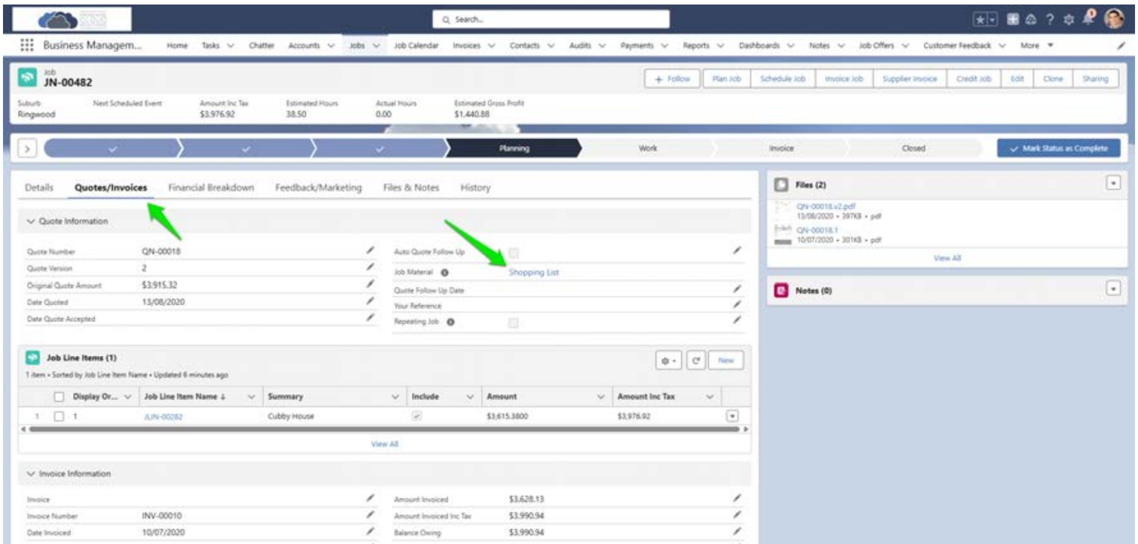
To add materials to a job plan, *See* “Detailed quote: Add materials and material estimates” on page cxliii.

How to print a materials shopping list for a job

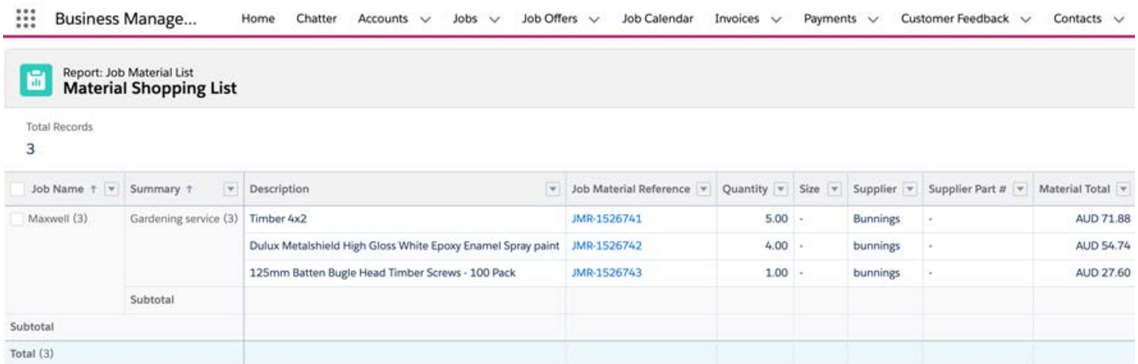
A materials shopping list depends on you listing all the materials needed for the job during job planning.

To print a materials shopping list

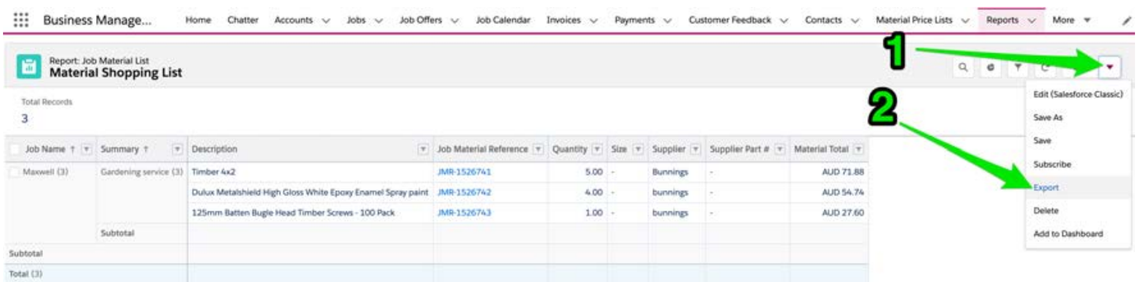
1. From the Job, click the **Quotes/Invoices** tab, then click the `Job Material`**Shopping List** link.



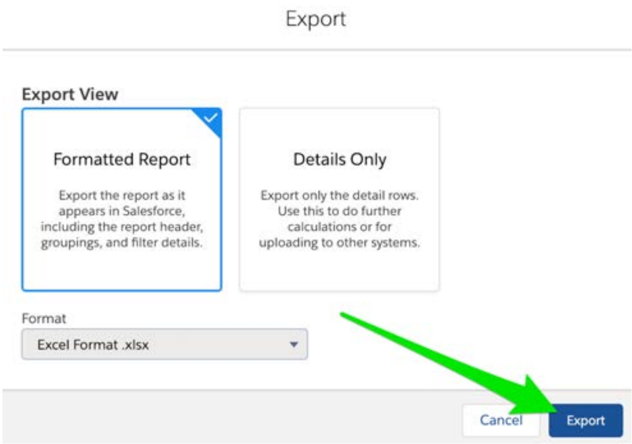
2. The **Materials Shopping List** report displays.



3. Export the report.



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.

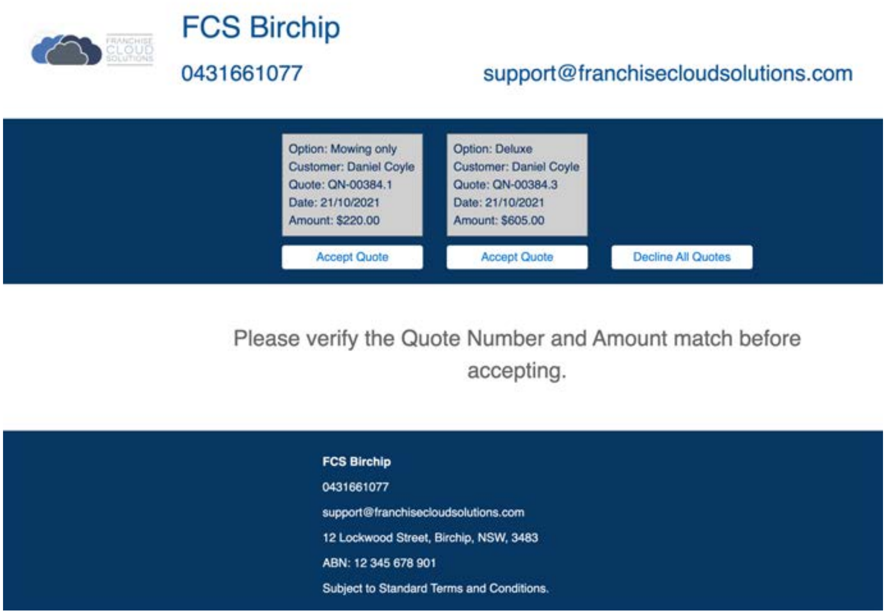
The customer adds a complex new delivery

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.



> 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.

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

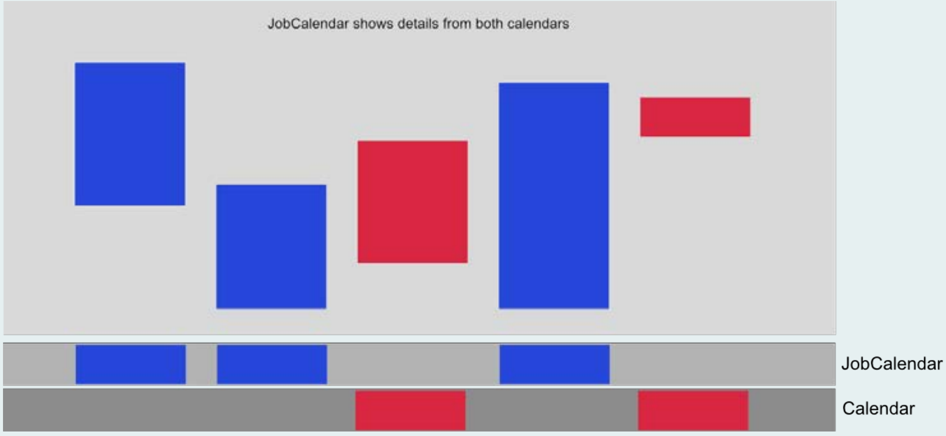
- schedules job and non-job appointments for one or multiple resources
- reminds customers and resources of upcoming appointments
- communicates job scheduling to contractors or employees across desktop, mobile and tablet devices so they can use it in the office or while they are on-the-road.

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

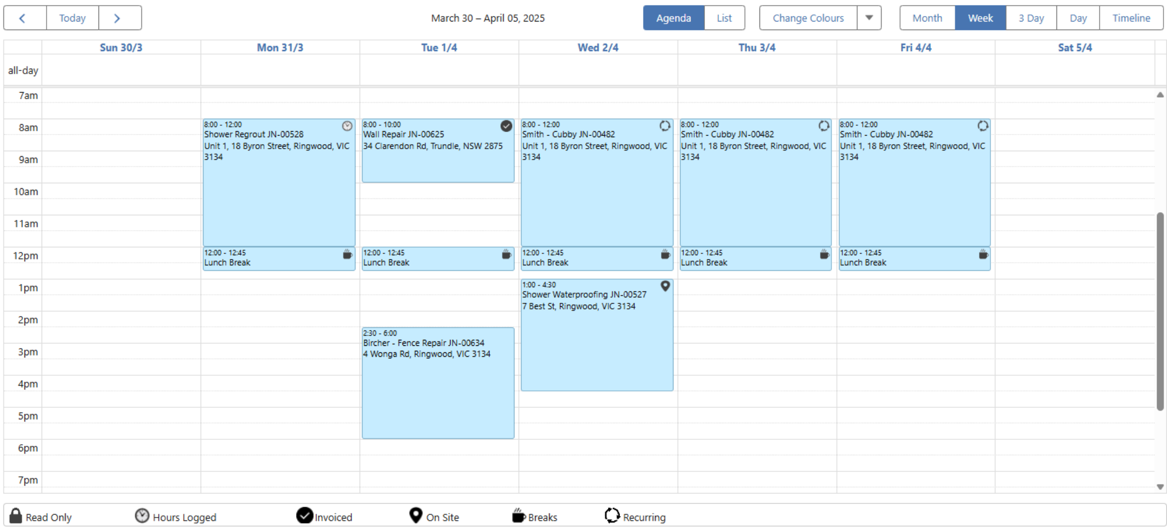
- When you create an event on the regular Salesforce Calendar, the appointment will appear on both the Salesforce Calendar and the Job Calendar.
- When you create an event on the Job Calendar, the appointment will appear on the Job Calendar and the block of time for the event is blocked out on the regular 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.

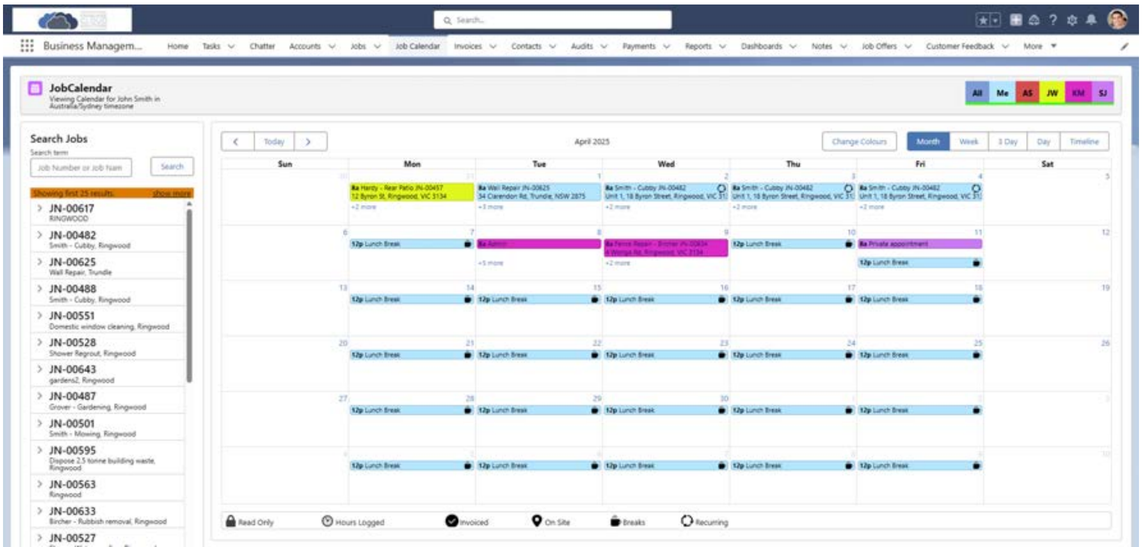
Icon	Description
Read Only	The event's related record has no job or no job visible to the current user. This might be because the user created the event on the calendar unrelated to a Job or because another user created the event using a Job for which the current user has no visibility.
On Site	A resource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

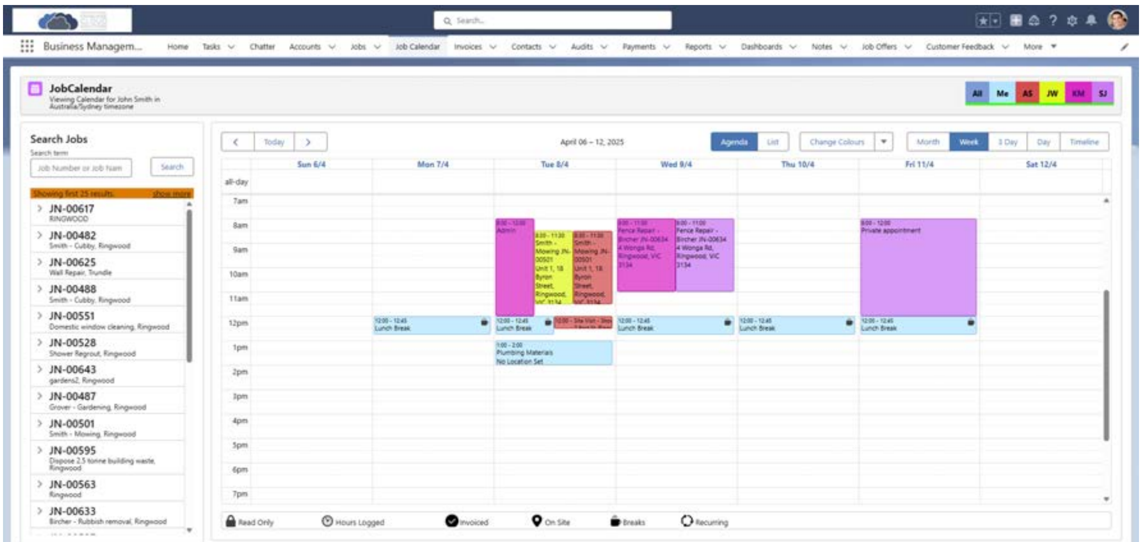
Job Calendar can show a range of views

Job Calendar can show a range of different views

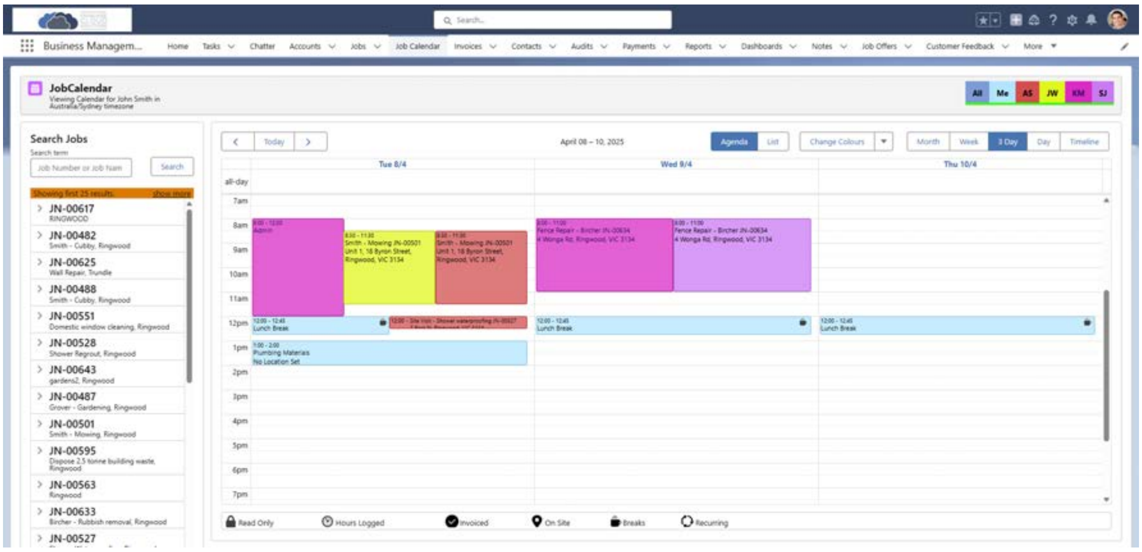
» Month view



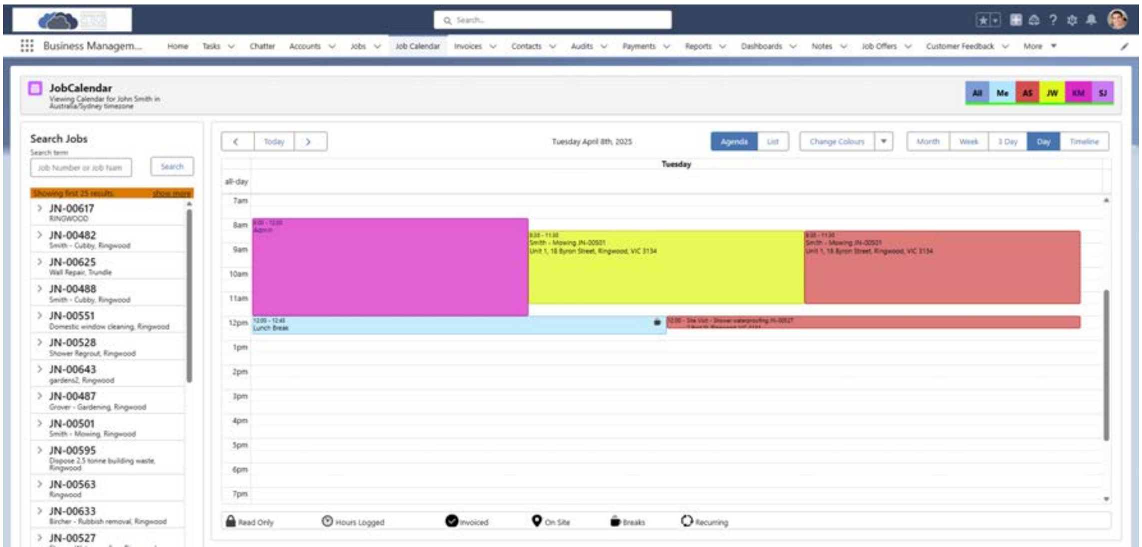
» Week view



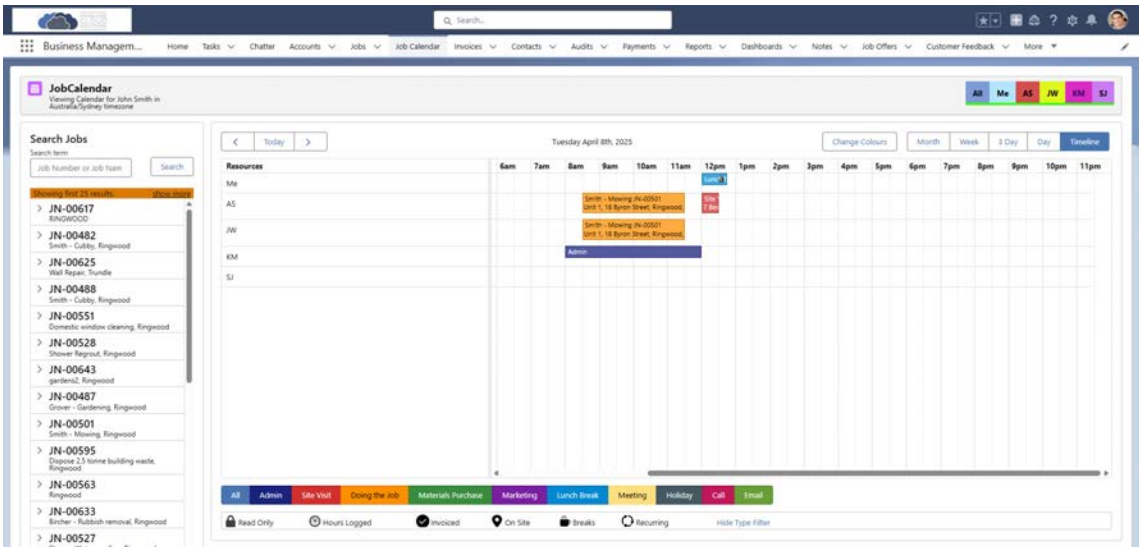
» 3 Day view



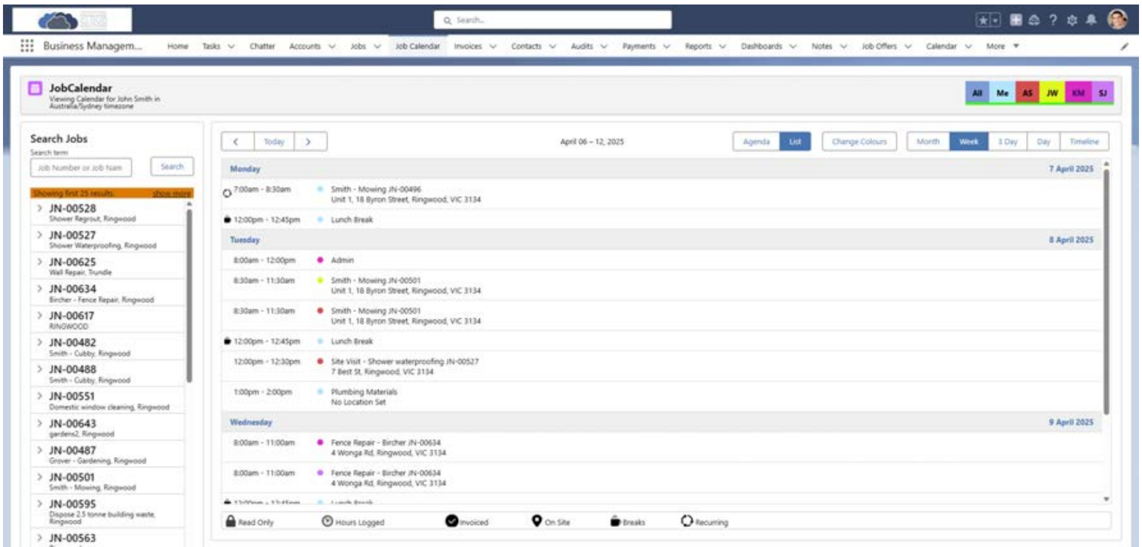
» Day view



» Timeline view



» List view



Job Calendar events can be colour-coded by Type

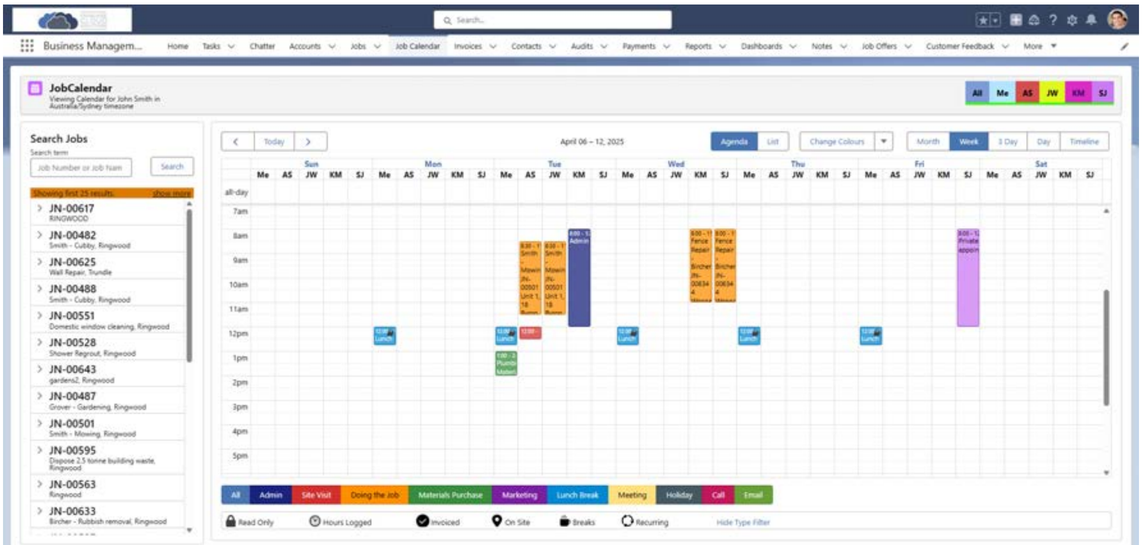
The display colour of an event on the Job Calendar can depend on the `Type` of event. This color-coding feature is available when a single resource is selected. To view more than one resource's events colour-coded by type, click **Group By Resource**. This option is available in the **Week**, **3 Day**, 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.

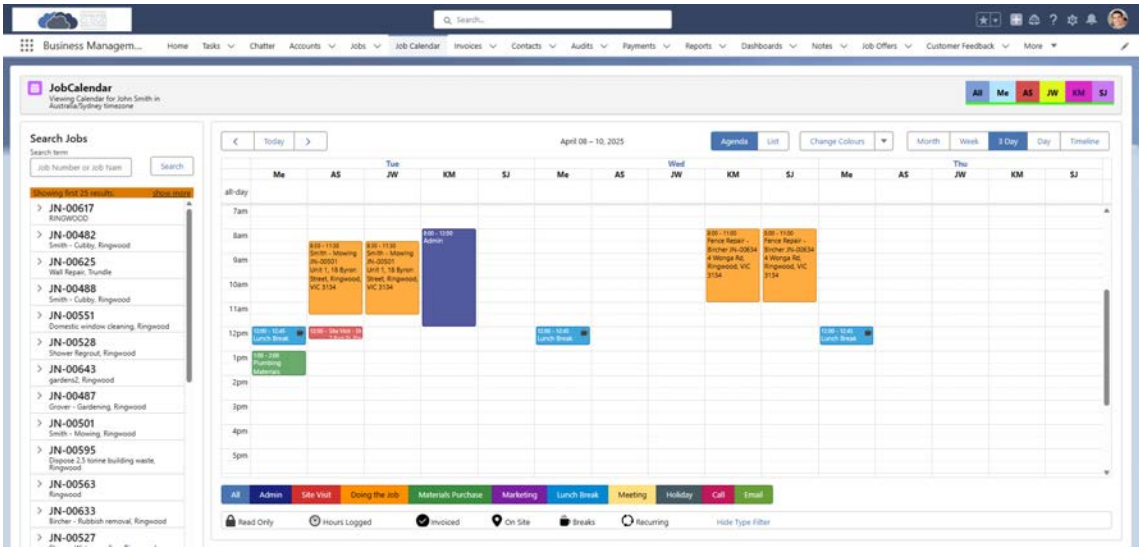
To go back to viewing events by the resource's alias colour, select **Ungroup Resources**.

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

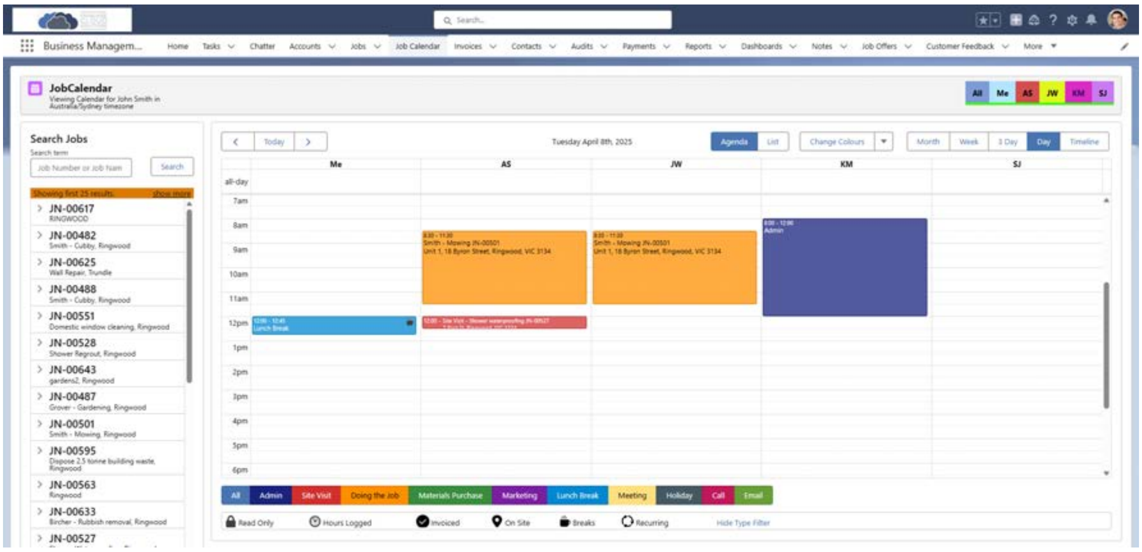
» Week view



» 3 Day view

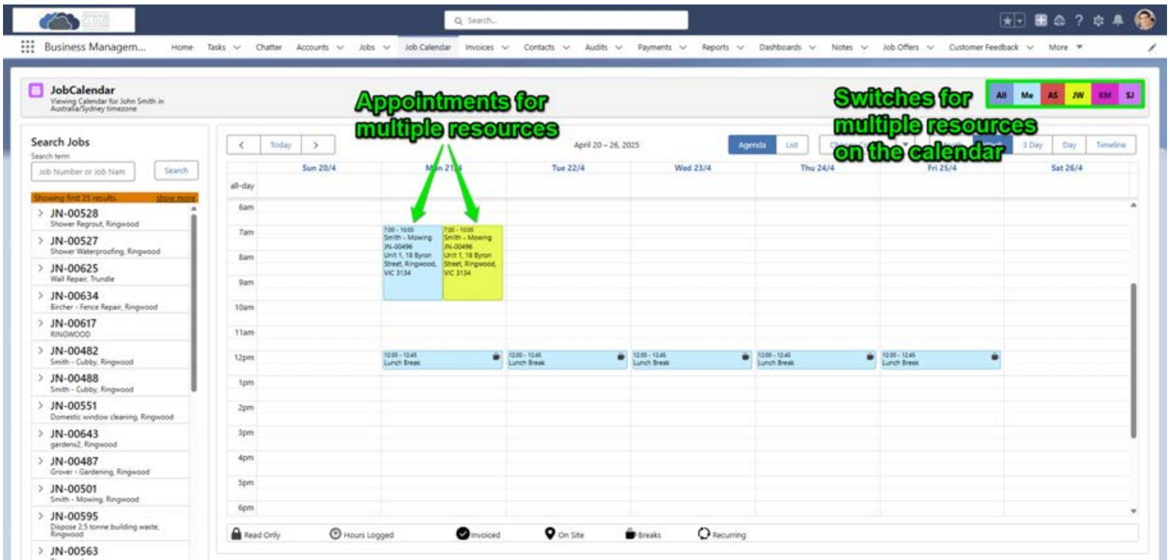


» Day view

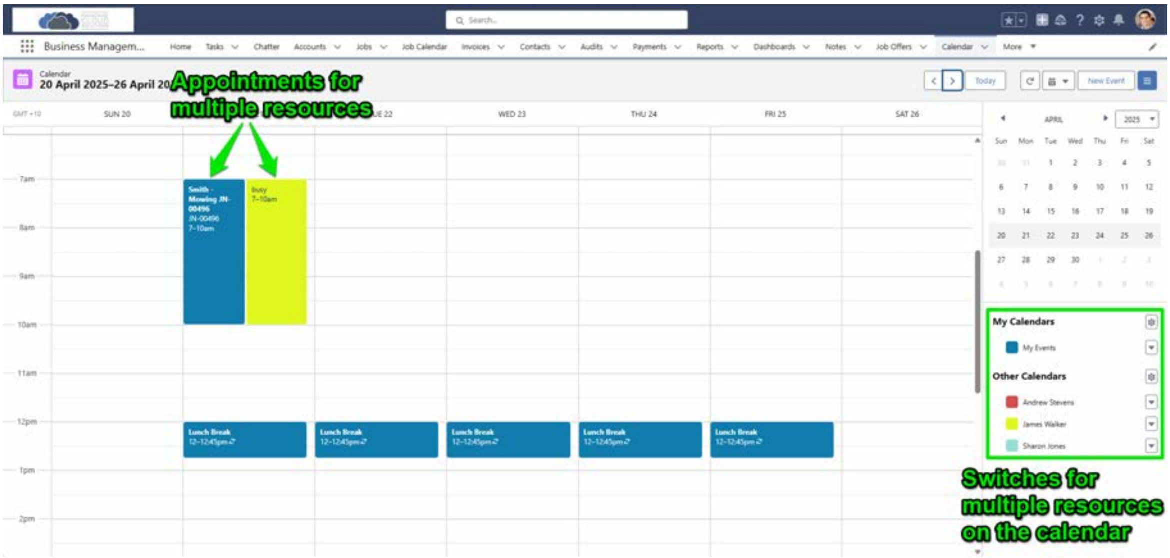


Job Calendar and Calendar can both show calendars for multiple resources

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.



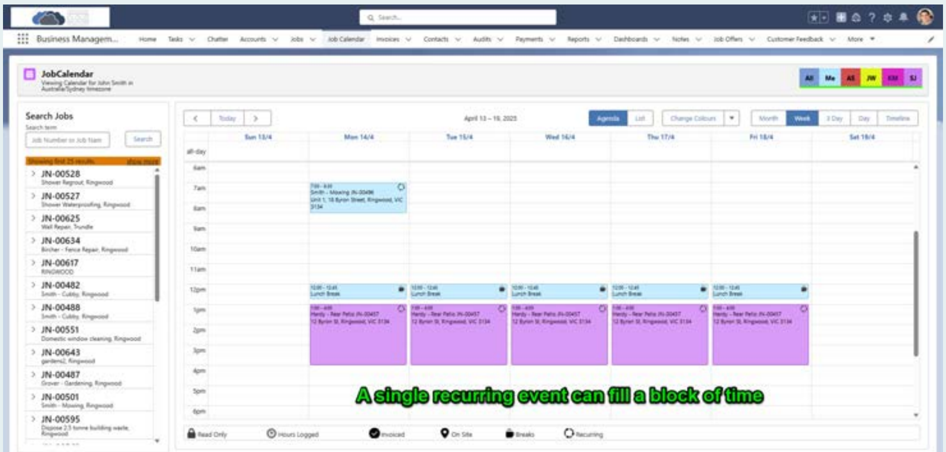
Calendar also has the ability to display appointments for multiple resources on a single calendar view. You can also switch on or off particular resources simply by clicking on them.


Appointments for multiple resources
Switches for multiple resources on the calendar
Calendar
20 April 2025–26 April 20
My Calendars
My Events
Other Calendars
Andrew Stevens
James Walker
Sharon Jones
Lunch Break
12–12:45pm
Busy
7–10am

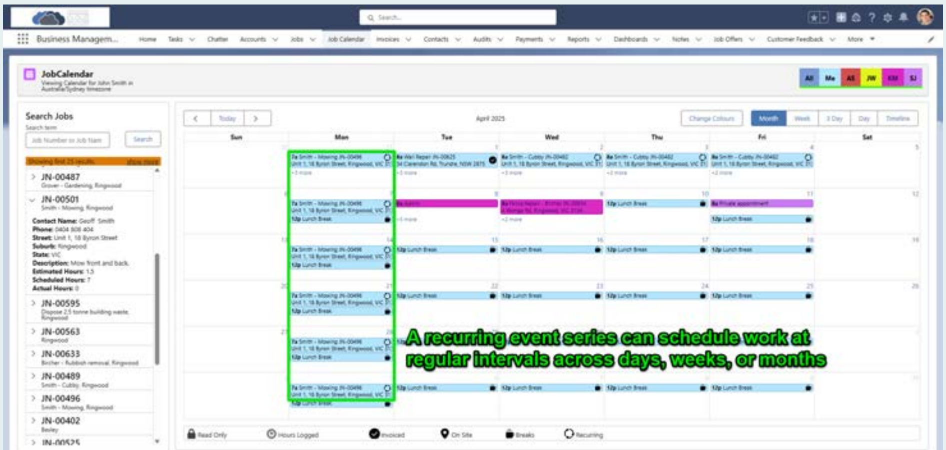
Repeating events for jobs in Job Calendar

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.



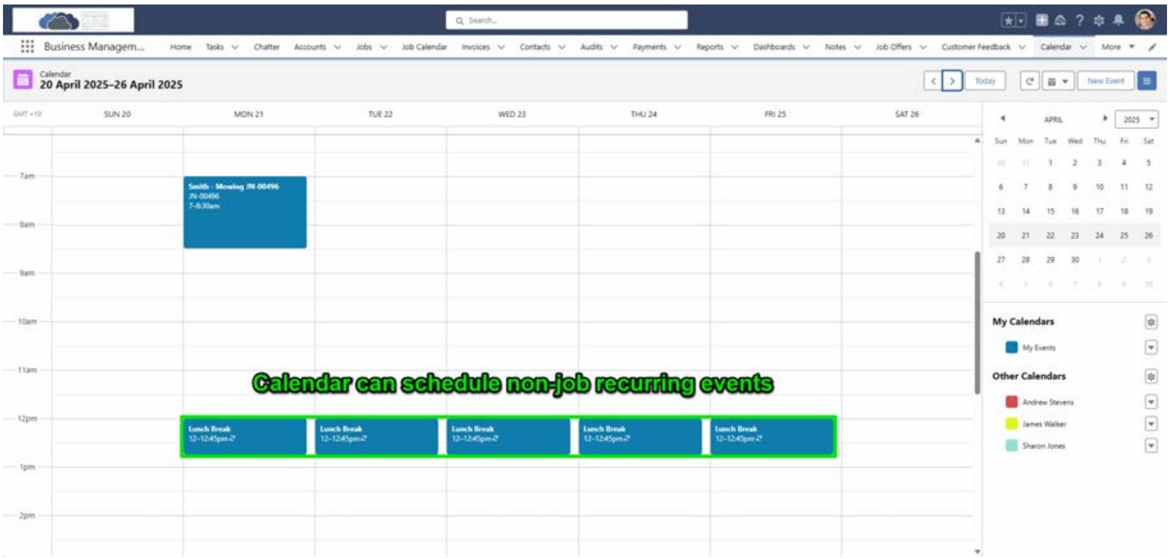
Repeating job events can also be used to schedule events that recur at fixed intervals.



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.

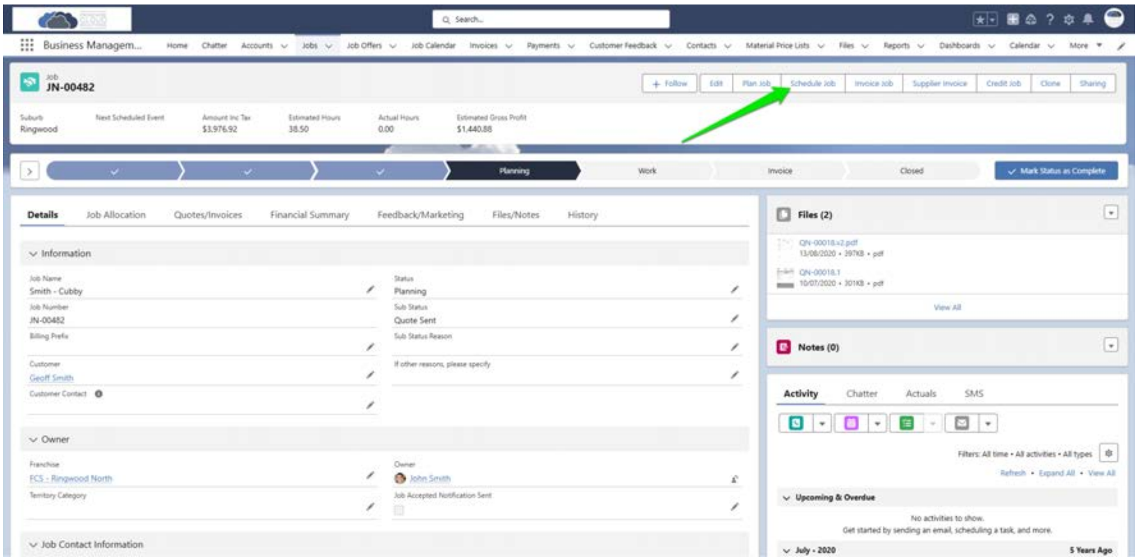


How to access job scheduling

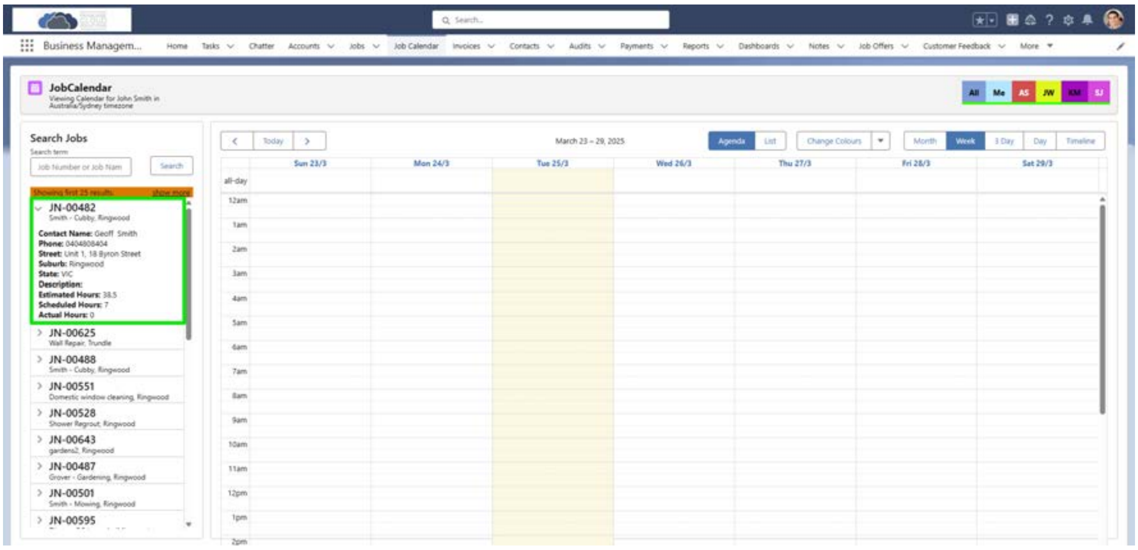
When the Job is ready to be scheduled, you schedule one or more appointments with the customer via the **Job Schedule** button.

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.

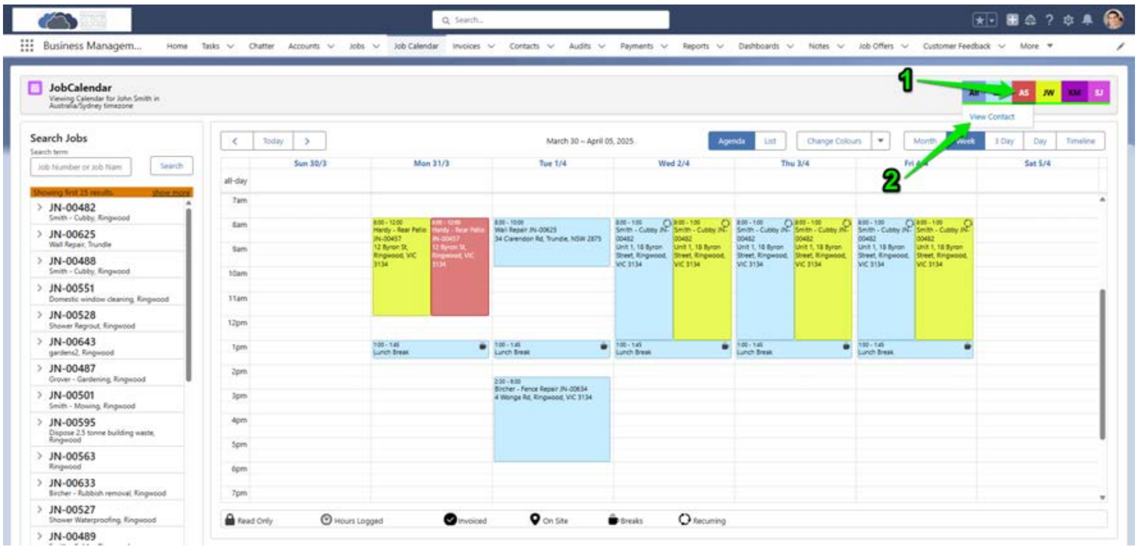
Setting up Job Calendar

How to add, remove or alter calendar resources

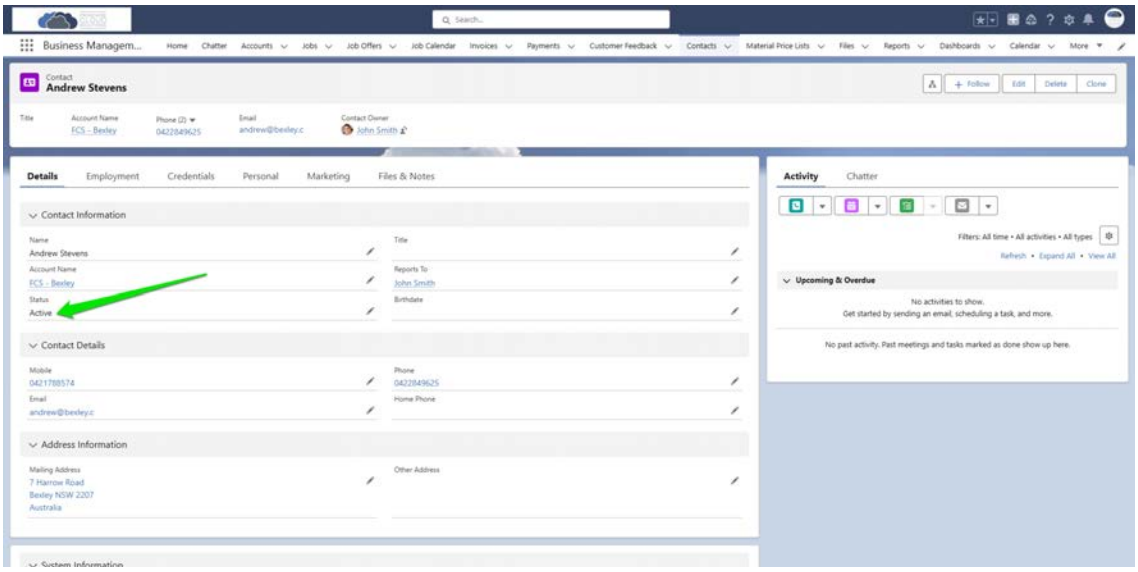
> To add a Job Calendar resource, your system administrator will need to set up the new resource.

To remove a Job Calendar resource

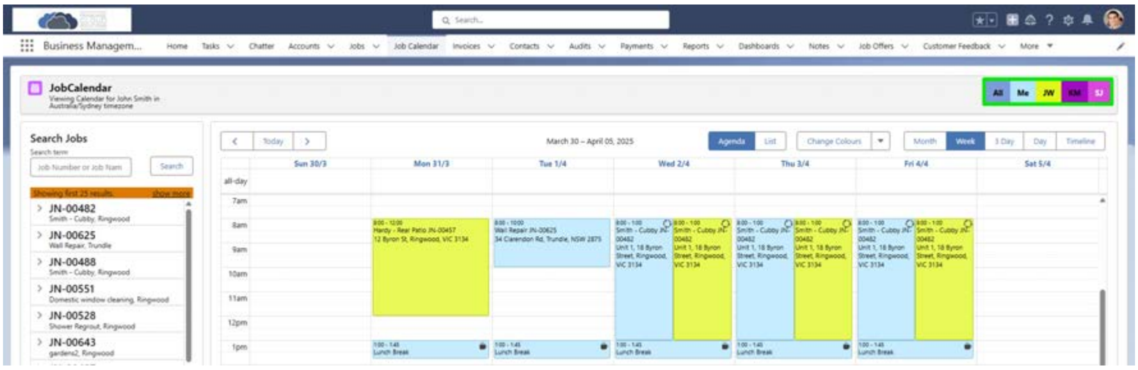
1. From the Job Calendar resource pane, right-click the resource you want to remove, then click **View Contact**.



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

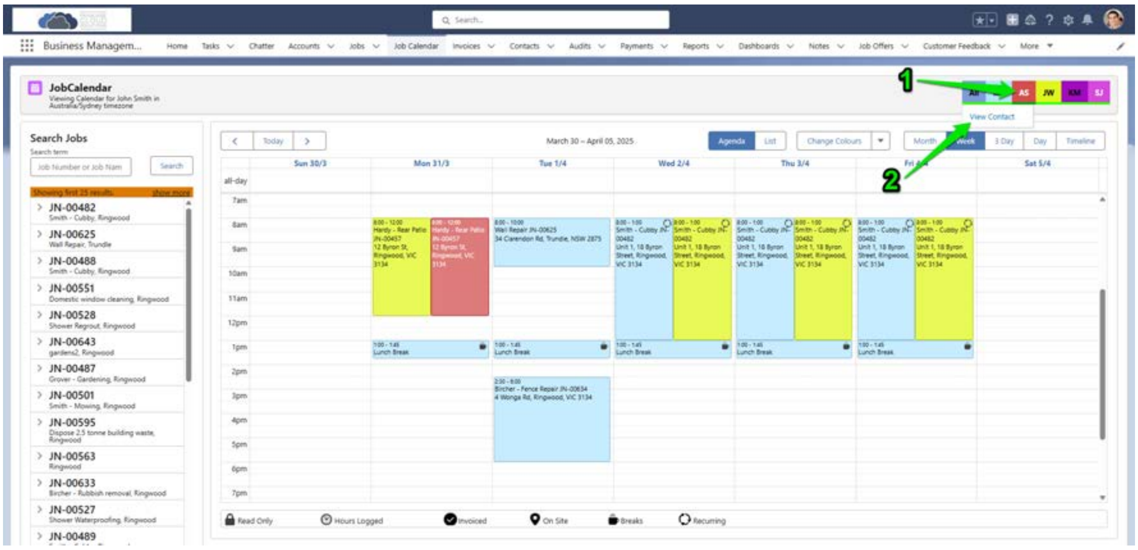


3. The resource is now removed from the Job Calendar resource pane.

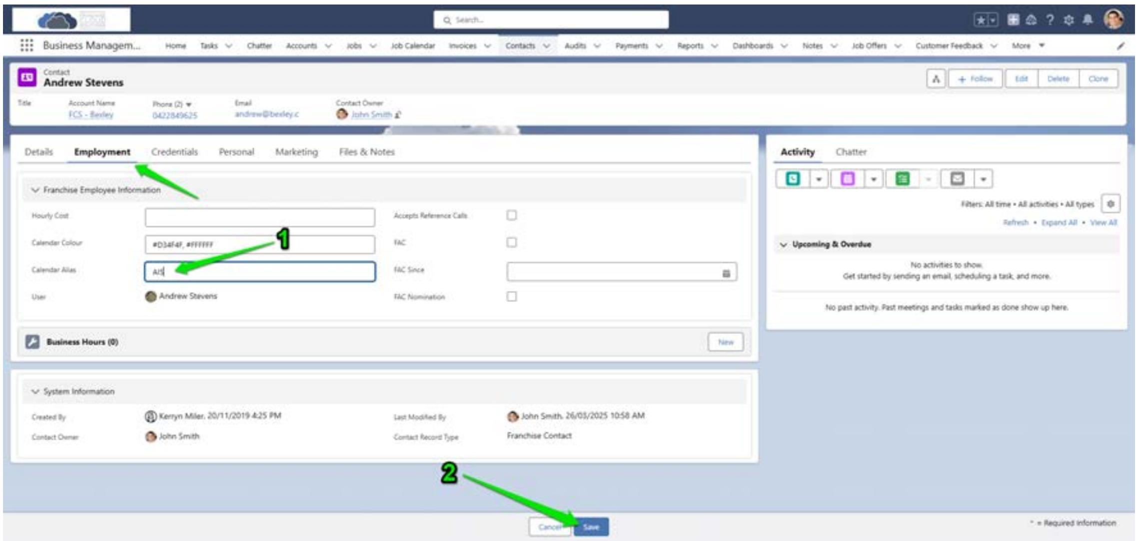


To change a name on the resource pane

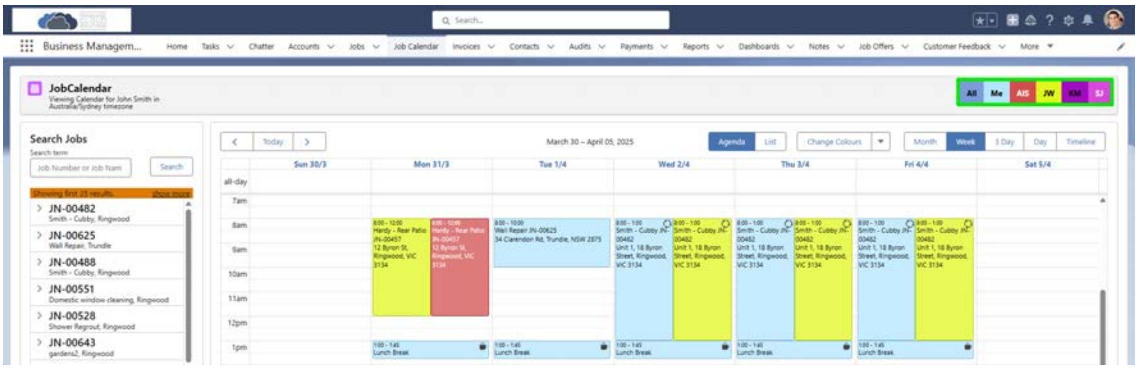
1. From the Job Calendar resource pane, right-click the resource whose alias you want to change, then click **View Contact**.



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.

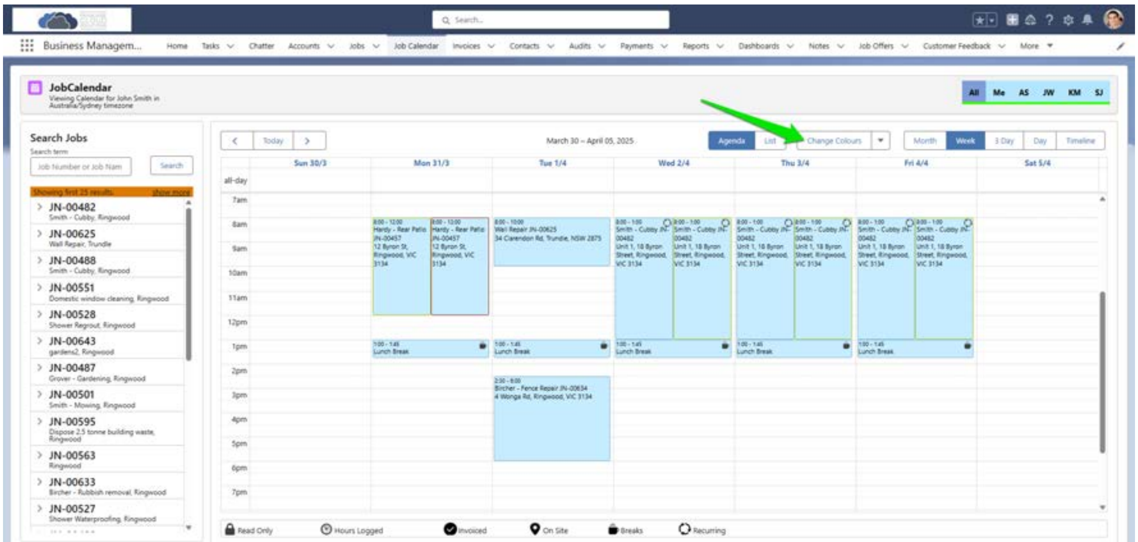


How to change calendar colours

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

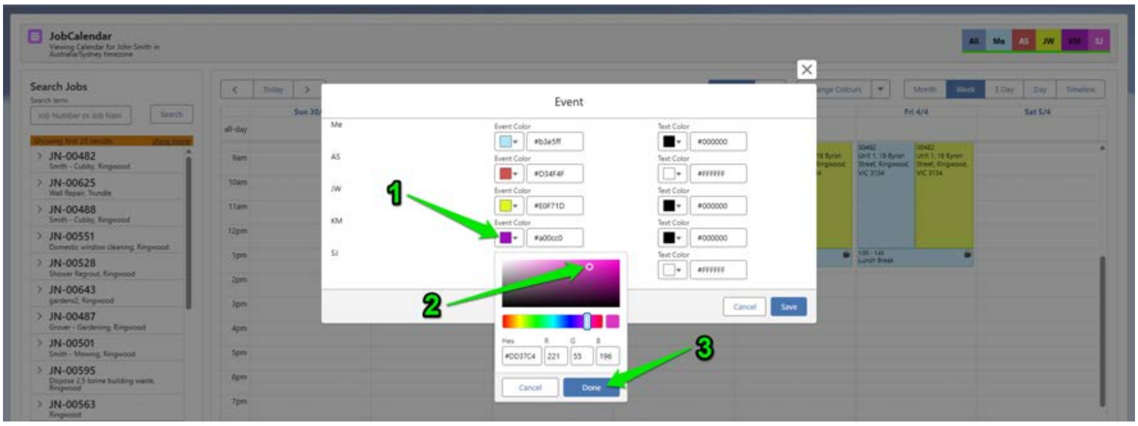
To set the calendar colour for an employee

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



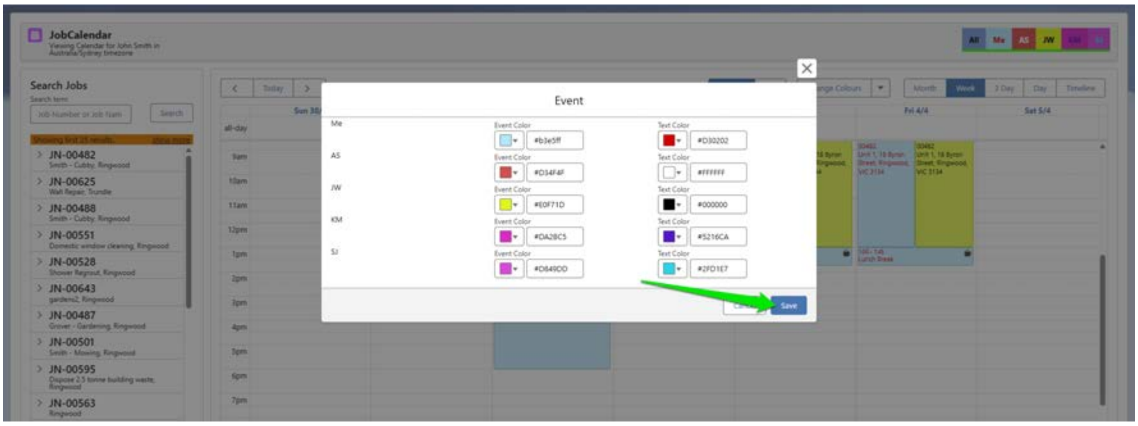
   The **Event** colour picker dialog box appears.

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

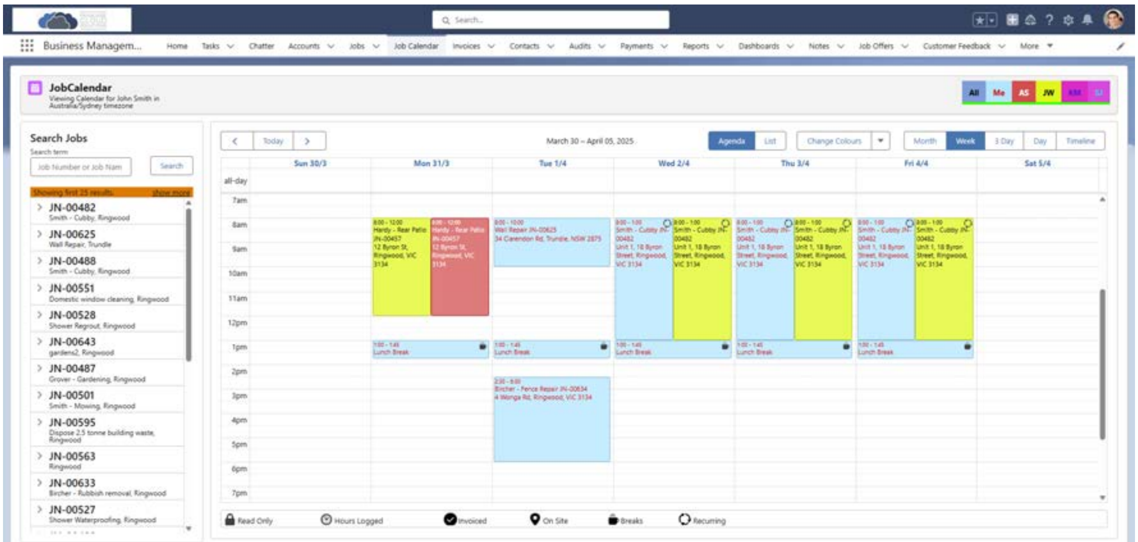


3. Change the **Text Color** in the same way.

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

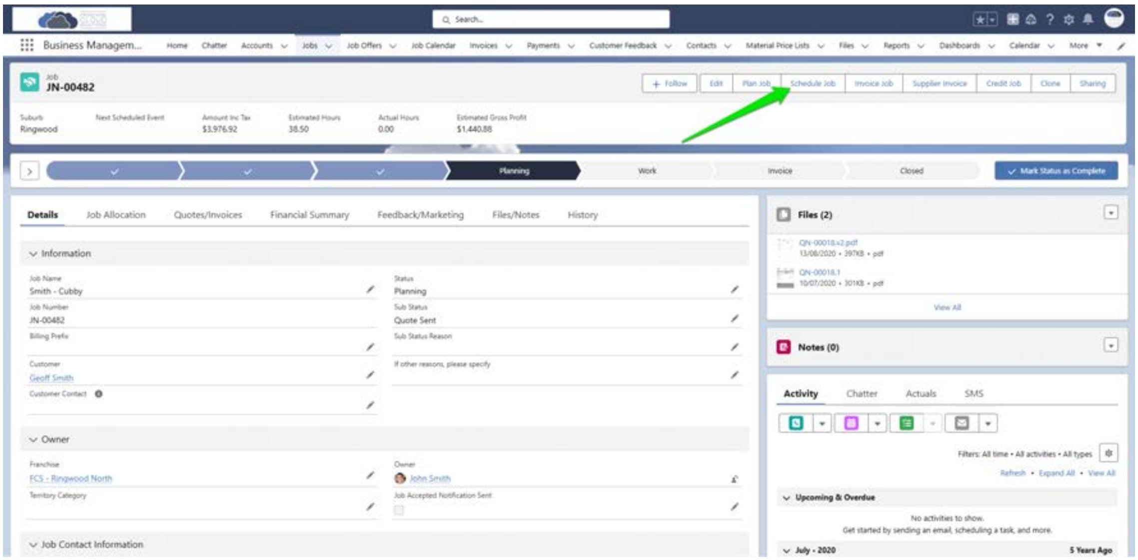
There are two ways to begin scheduling a job.

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

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

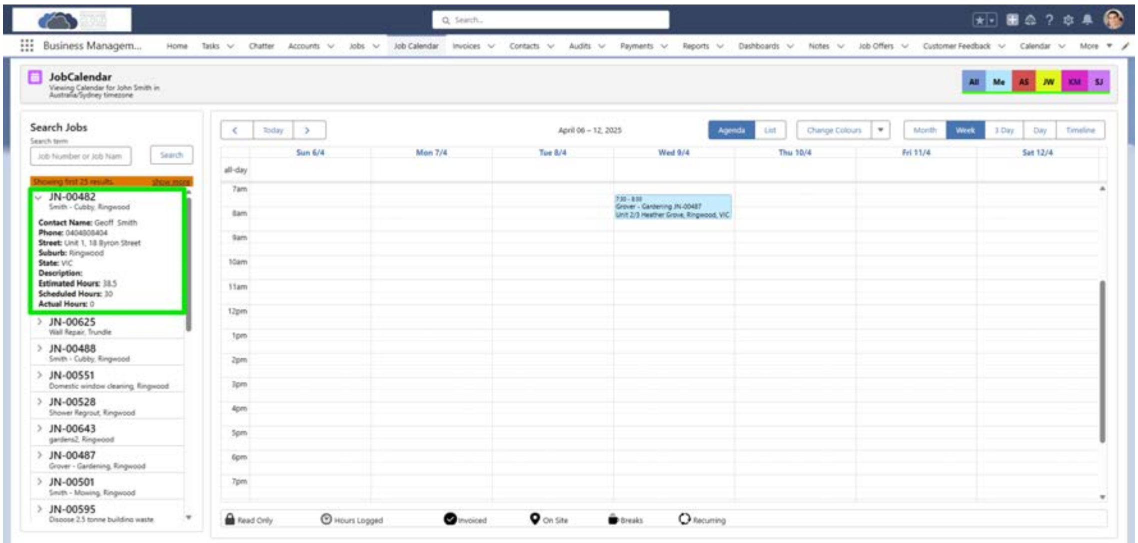
To schedule a job appointment

1. From the **Job** page, press **Schedule Job**.

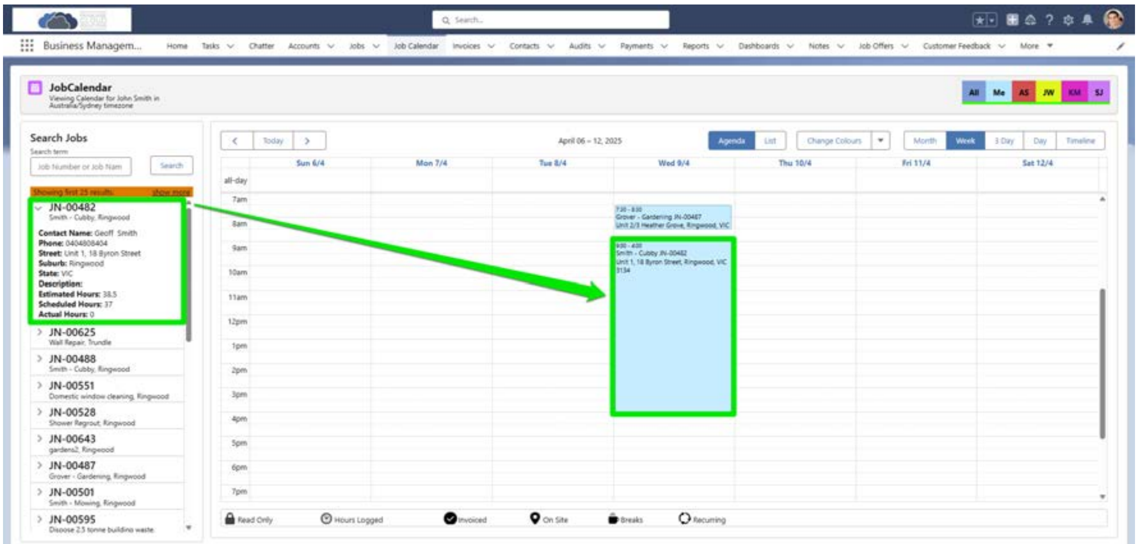


The **Job Schedule** page appears. You can now begin scheduling the job.

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



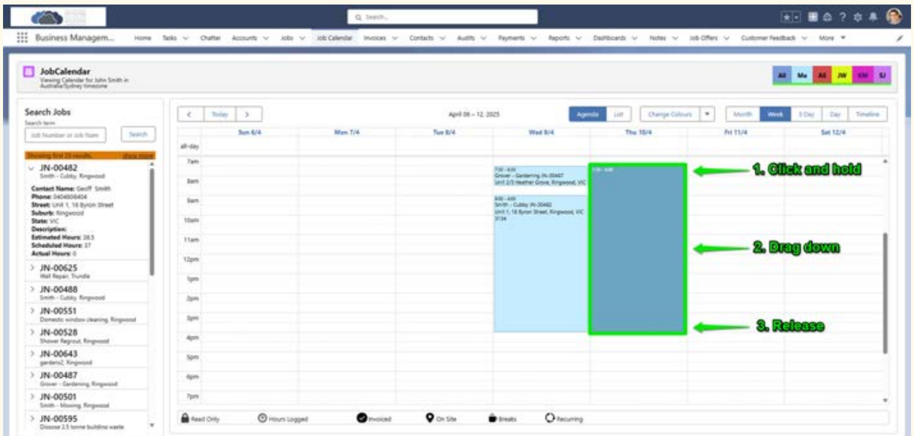
3. Now drag the job to the calendar in order to schedule it.



Alternatives

On a computer

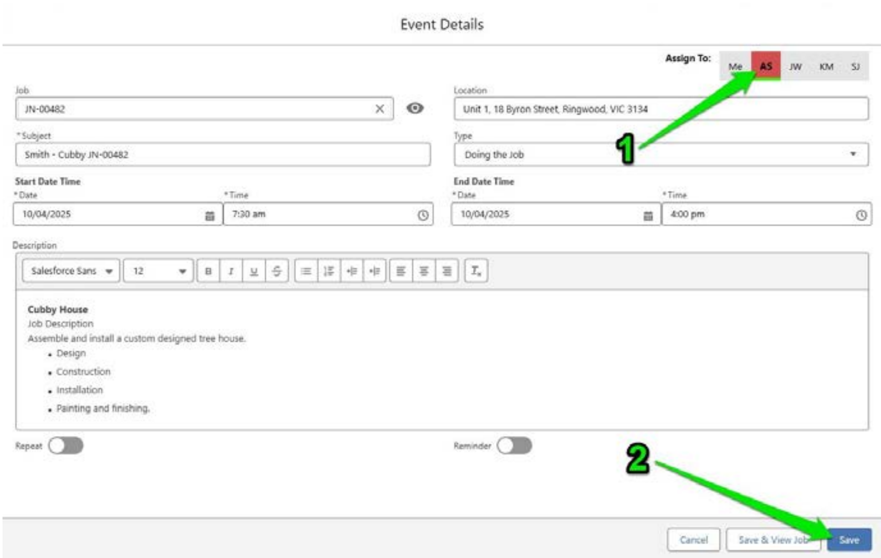
Simply mark out the location on the calendar (click, hold + drag) and release the mouse button in order to schedule the currently unfurled job.



On a tablet

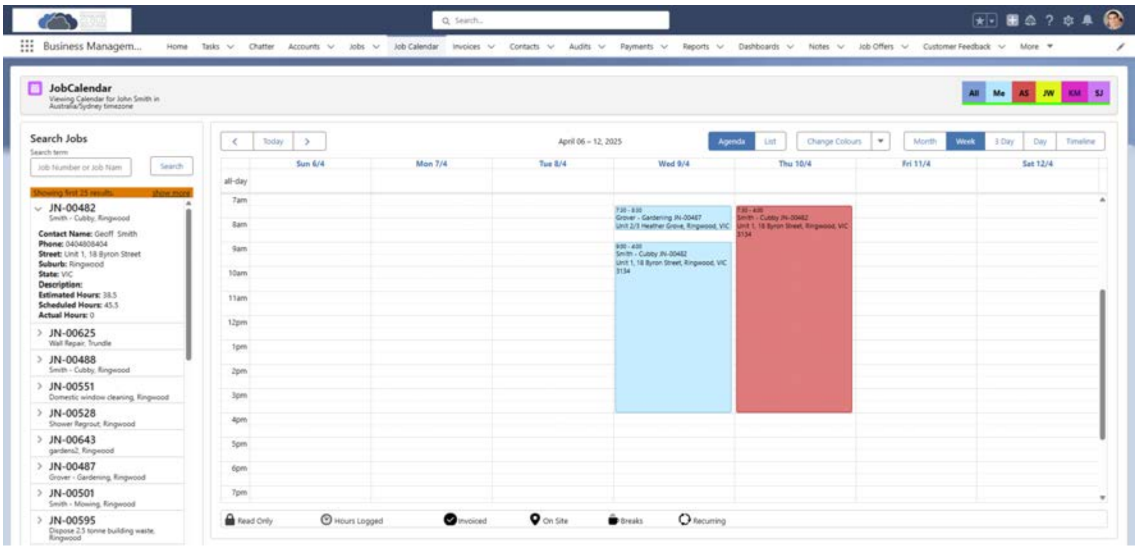
Tap + hold (for a few seconds). A 30 minute appointment will be created starting at the time you tapped, and will immediately open the **Event Details** dialog. Adjust the **End Time** to set the length of the appointment.

4. Select the person to perform the work. Review the remainder of the pre-filled information. When you are satisfied, press **Save**.



> 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.

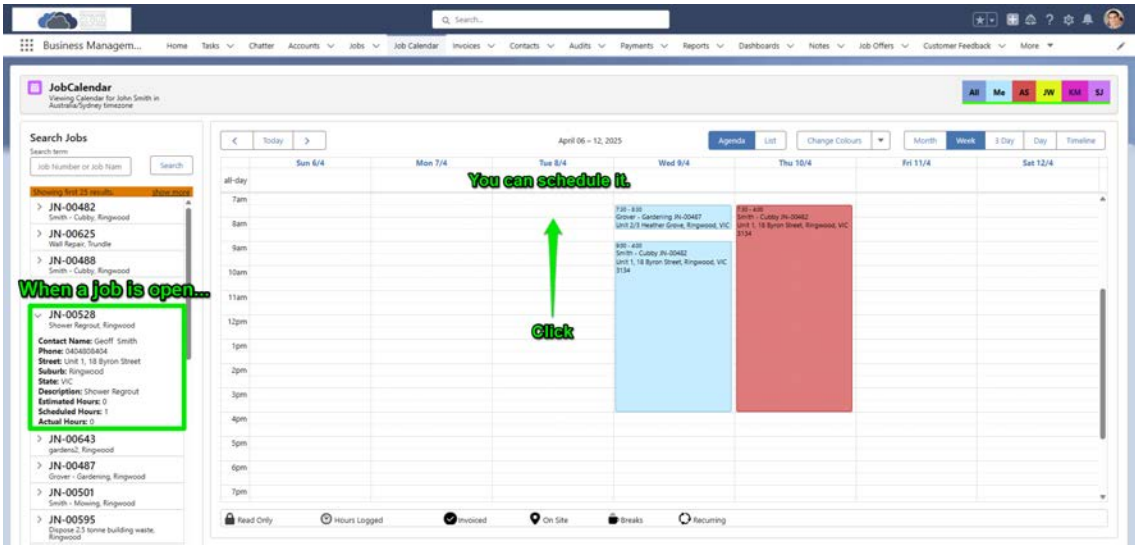


6. Now repeat these actions until the job is fully scheduled.

> A job is considered “fully scheduled” when the number of hours for which it is scheduled meets or exceeds the number of planned hours.

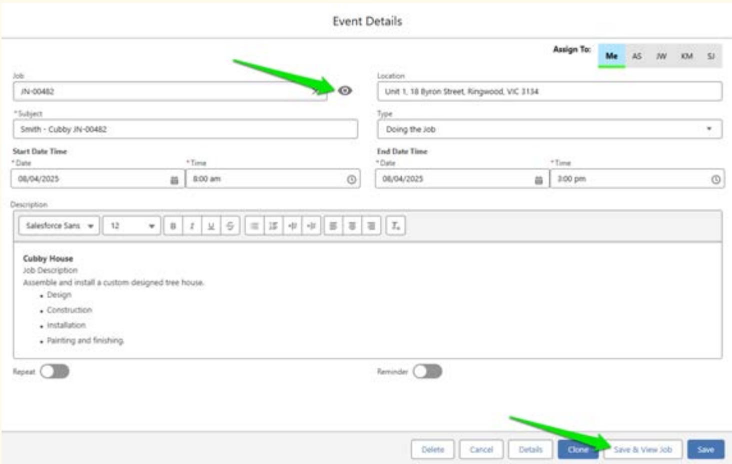
To schedule a second job

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.



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.



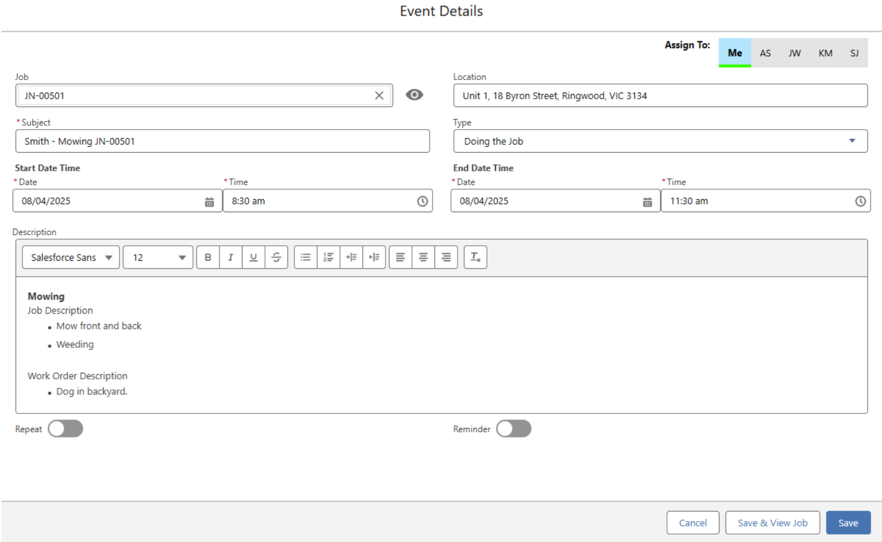
How to schedule an appointment for multiple resources

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.

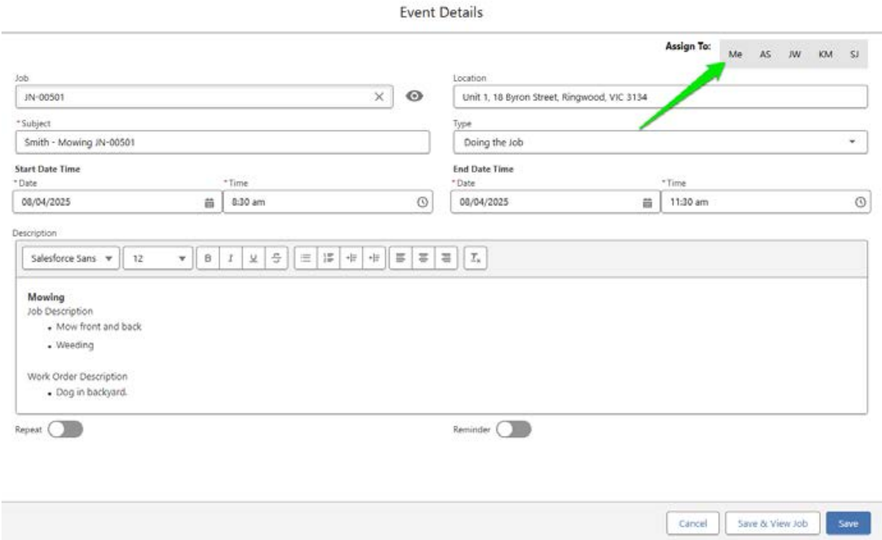
Where multiple resources are required for the entire job, you can create all the required appointments from a single event.

To schedule a job for multiple resources

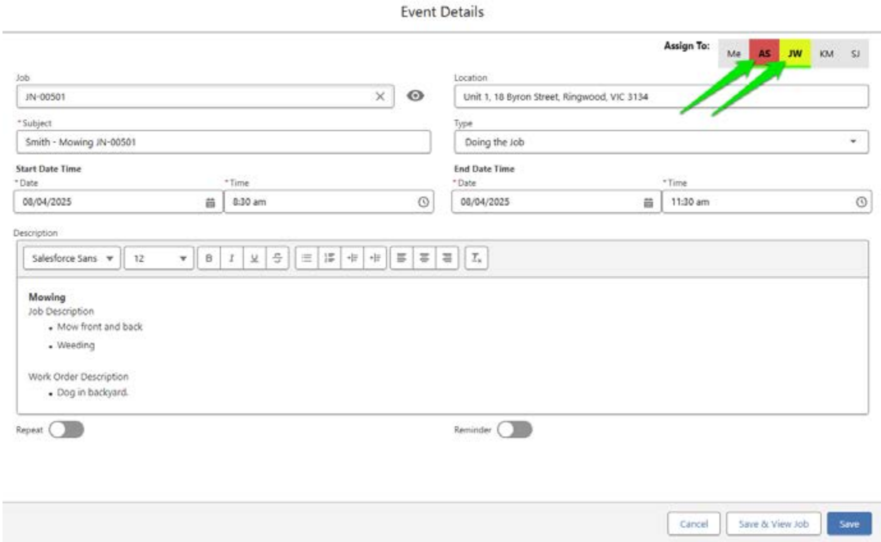
1. To create your first appointment, follow the instructions in "How to schedule a new appointment" on page cxcviii. (Stop before you click **Save**.) Your Event Details dialog will look something like this.



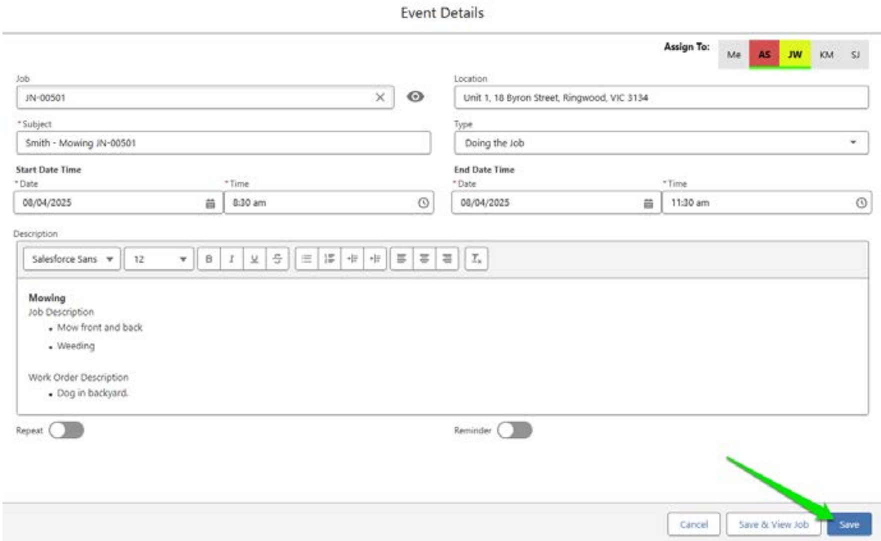
2. If you are not one of the resources who will do the job, click on **Me** to deselect yourself.



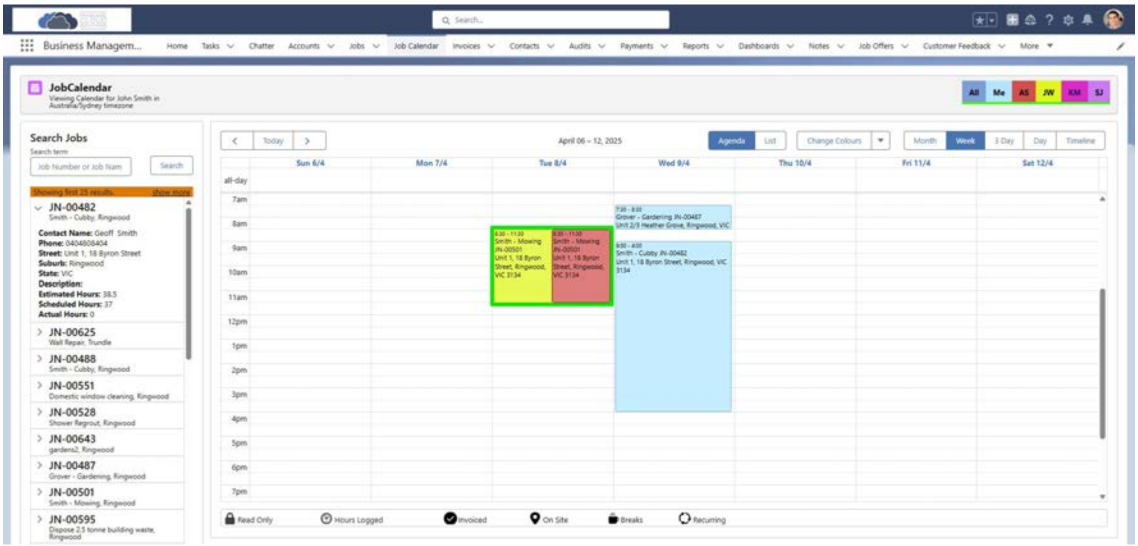
3. Click on each resource you want assigned to this appointment.



4. When complete, press **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.

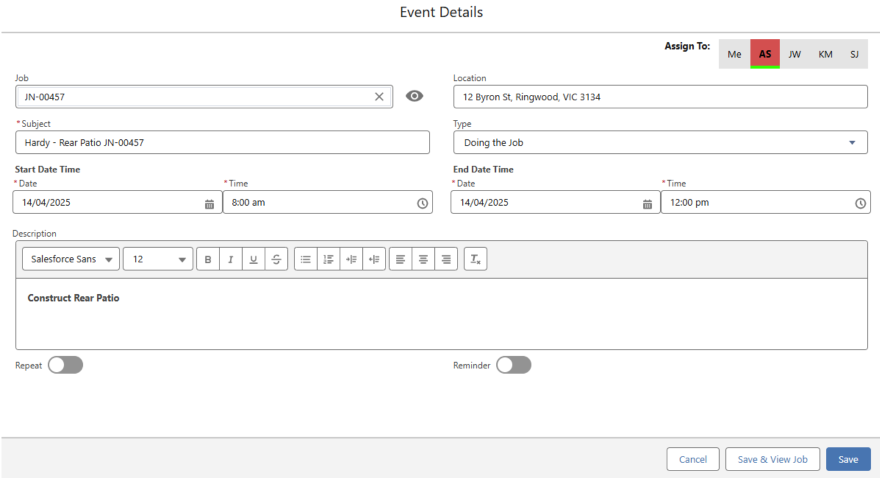
How to schedule appointments across multiple days

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

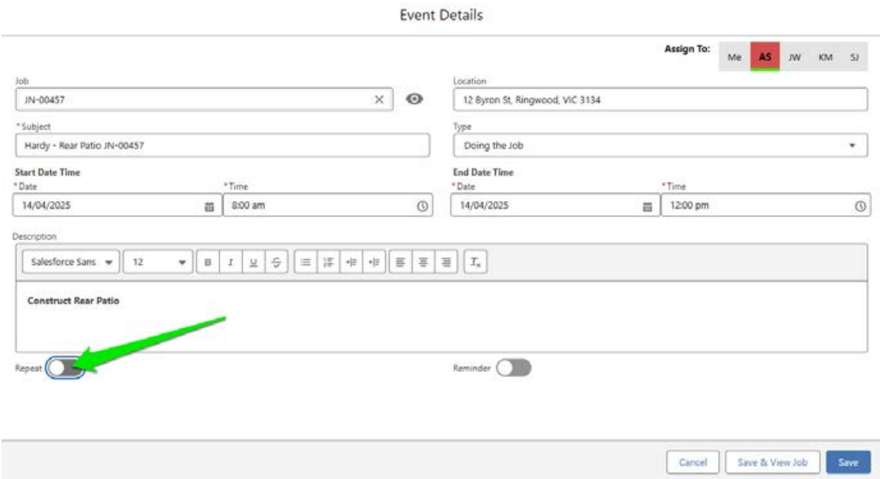
1. To create your first appointment, follow the instructions in “How to schedule a new appointment” on page cxcviii. (Stop before you click **Save**.) Your Event Details dialog will look something like this.



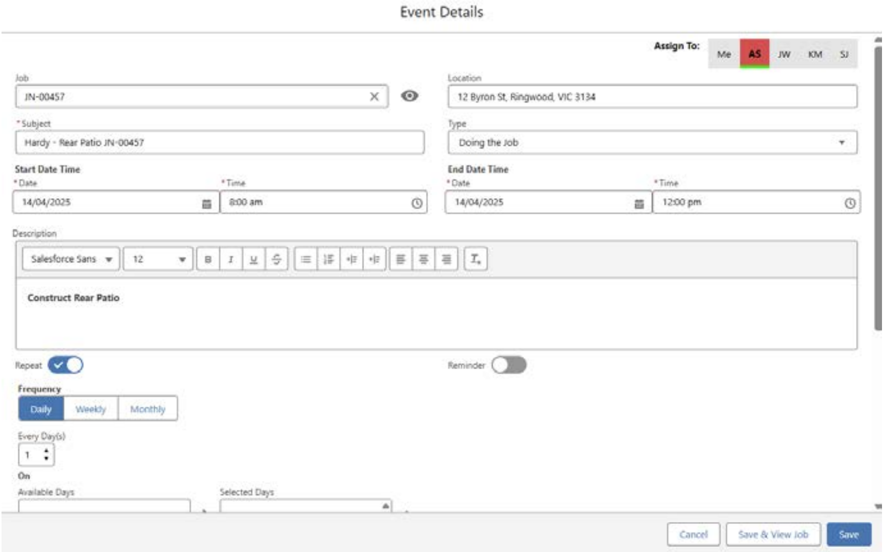
This dialog is set to create a single four-hour appointment on the morning of the first day of a construction project. This particular job is expected to take around two weeks to complete.

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.

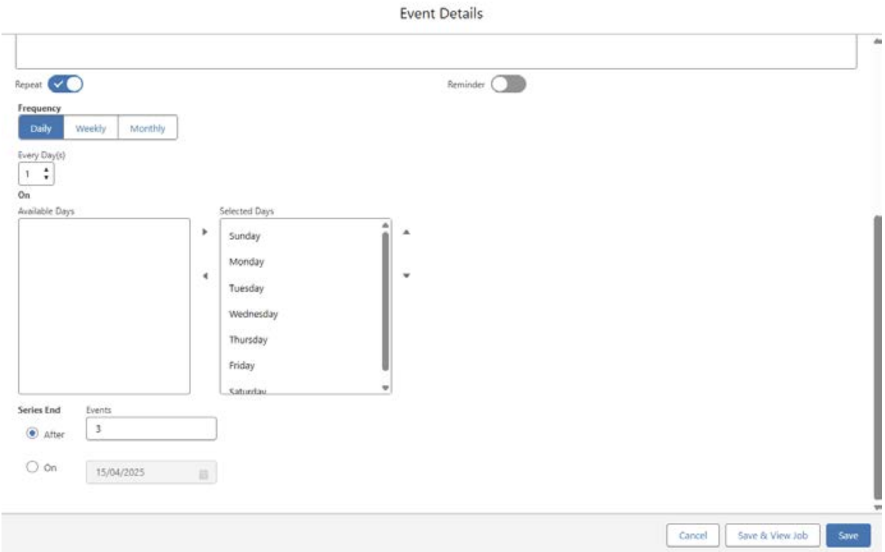
2. To repeat the appointment, press the **Repeat** button.



3. The **Repeat** pane opens.

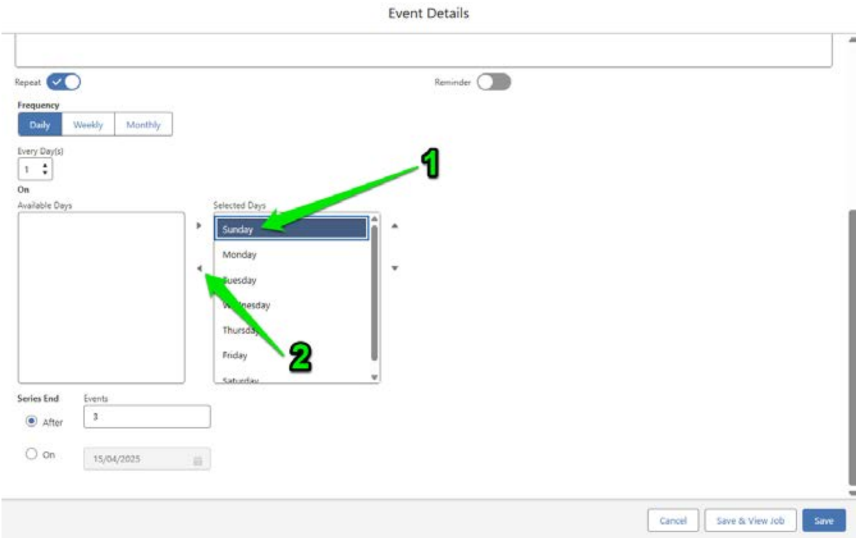


4. Scroll down to see the all of the **Repeat** pane.

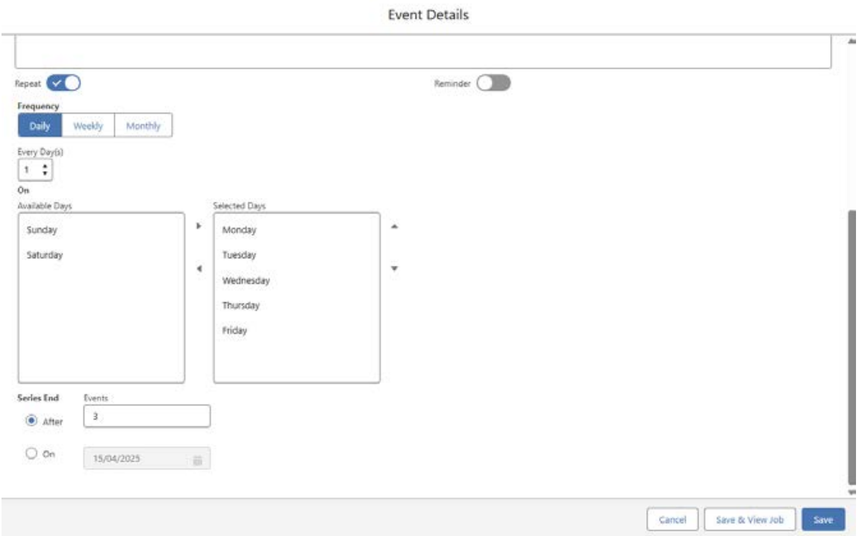


5. Now remove from **Selected Days** any days our resources won't be working.

   a. Click on a day in the **Selected Days** list then click the arrow to deselect it.

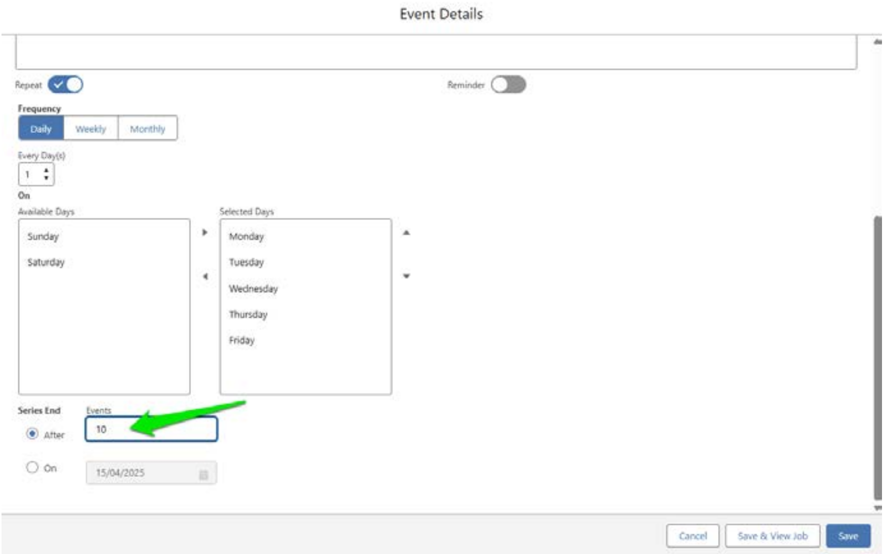


   b. Now do this for each other day your resources will not be working. The dialog will look something like this.

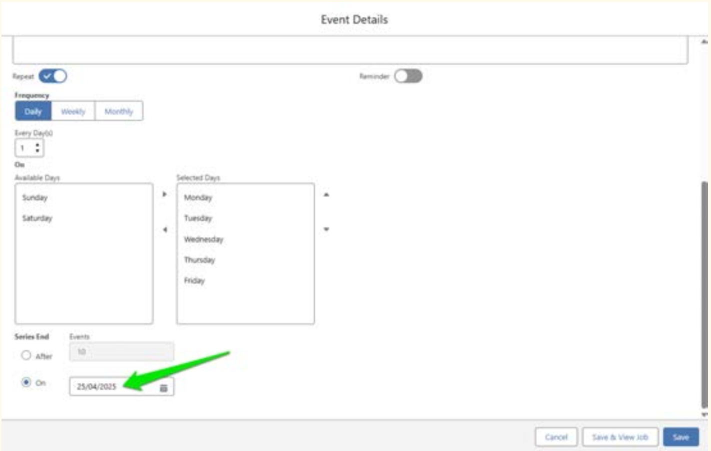


6. Because our resources will not be working on Saturday or Sunday, we remove Saturday and Sunday from the **Selected Days** list.

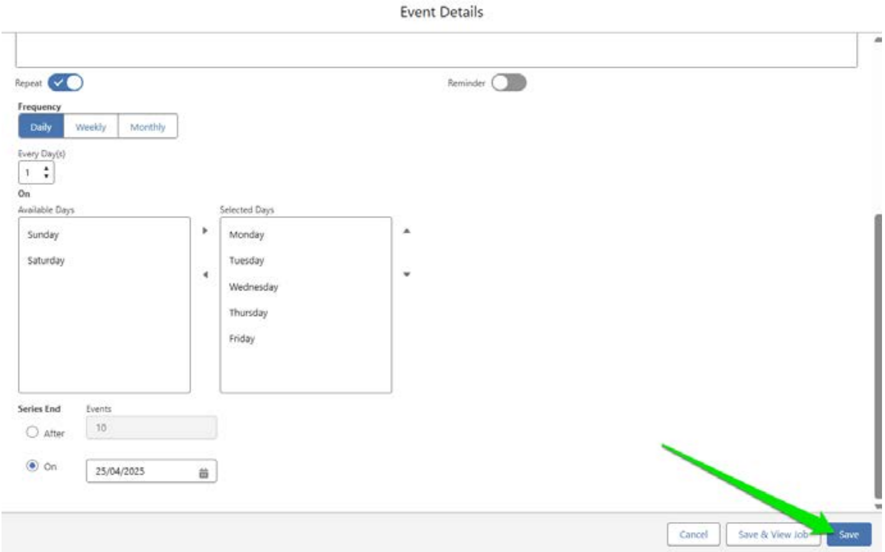
7. Now enter the number of days our resources will be working into the **Series End**, `After Events` field.



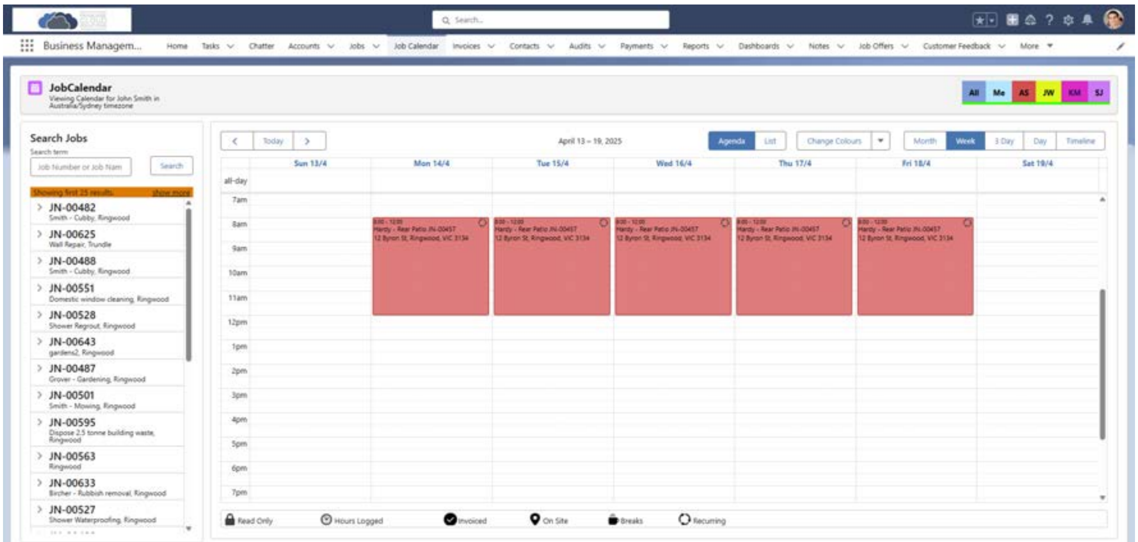
Or we could have chosen the final date of work.



8. Now press **Save**.



9. The Job Calendar now shows all the repeated appointments in the period we have specified.



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.

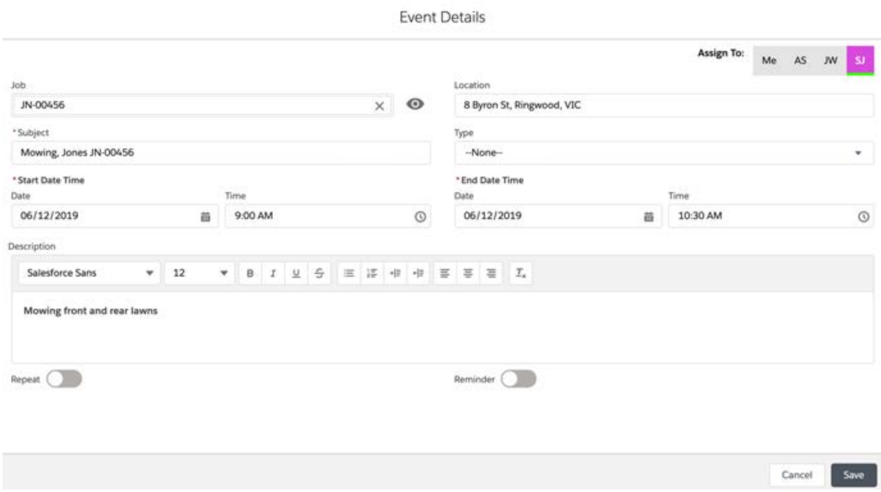
Business Management has the ability for you to set a regular series of visits far into the future. You can set

- 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

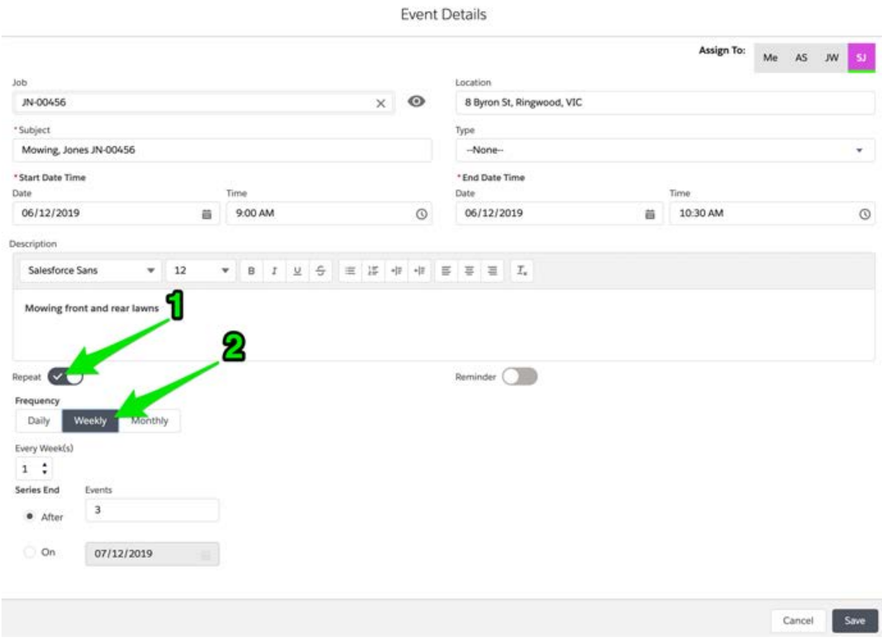
> Repeating jobs create an event series assigned to a single resource. If you need a series of appointments attended by multiple resources, simply create one repeating event series per resource.

To set a repeating schedule every N weeks

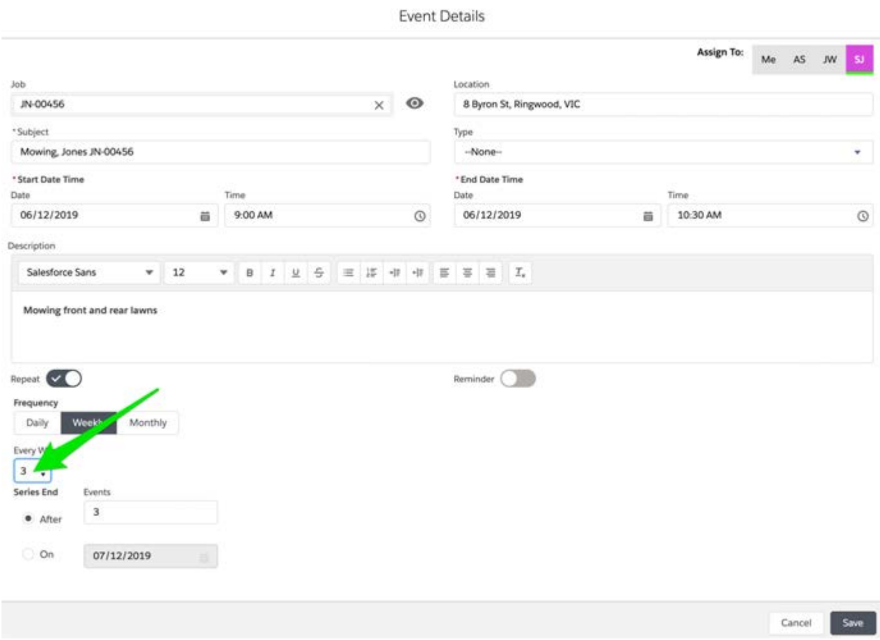
1. To create your first appointment, follow the instructions in "How to schedule a new appointment" on page cxcviii. (Stop before you click **Save**.) Your Event Details dialog will look something like this.



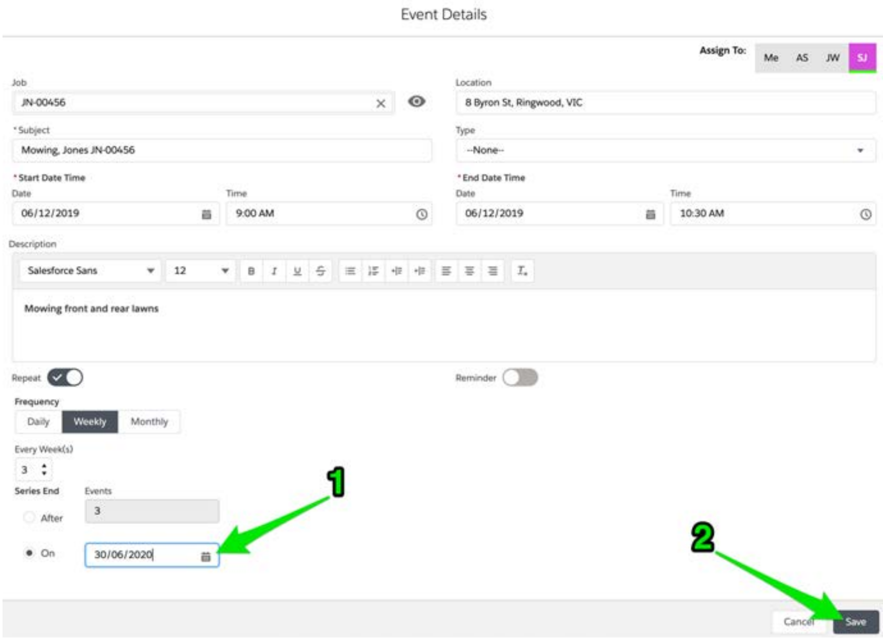
2. To set up the repeating series, press the **Repeat** button, then choose the **Weekly** option.



3. Now choose the interval between each visit. In this example, we're going to set it for every three weeks.

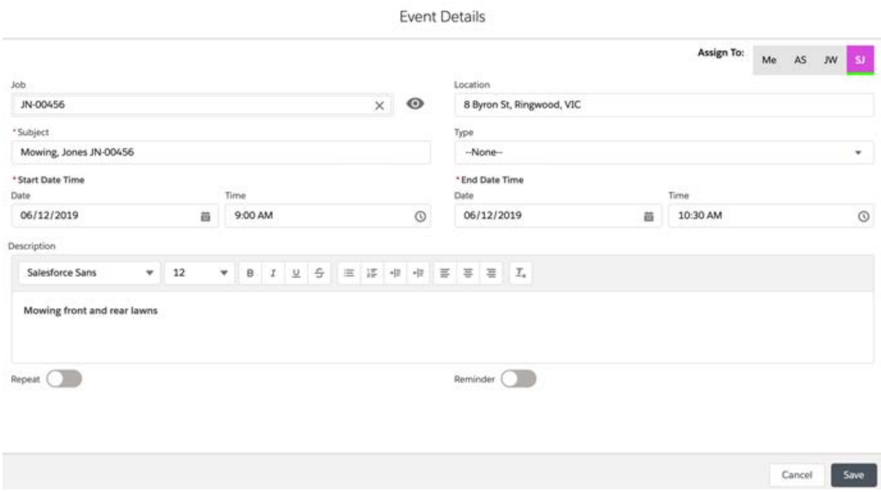


4. Now select when the series will end. You can choose for the series to end after a set number of visits OR to finish on a particular date. In this case, we're going to choose for the series to end on a particular date. Press **Save** when you're done.

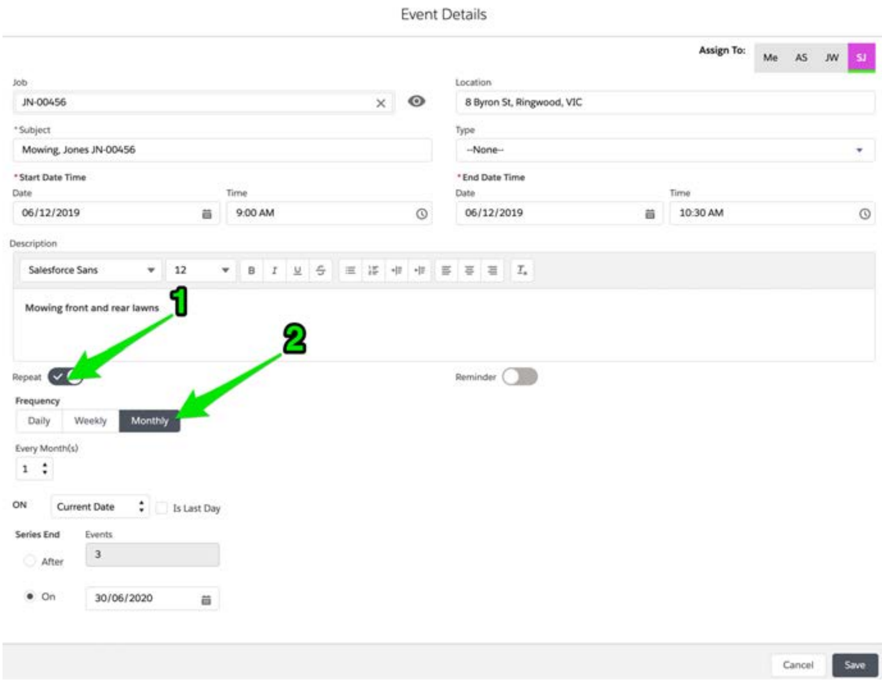


To set a repeating schedule every N months

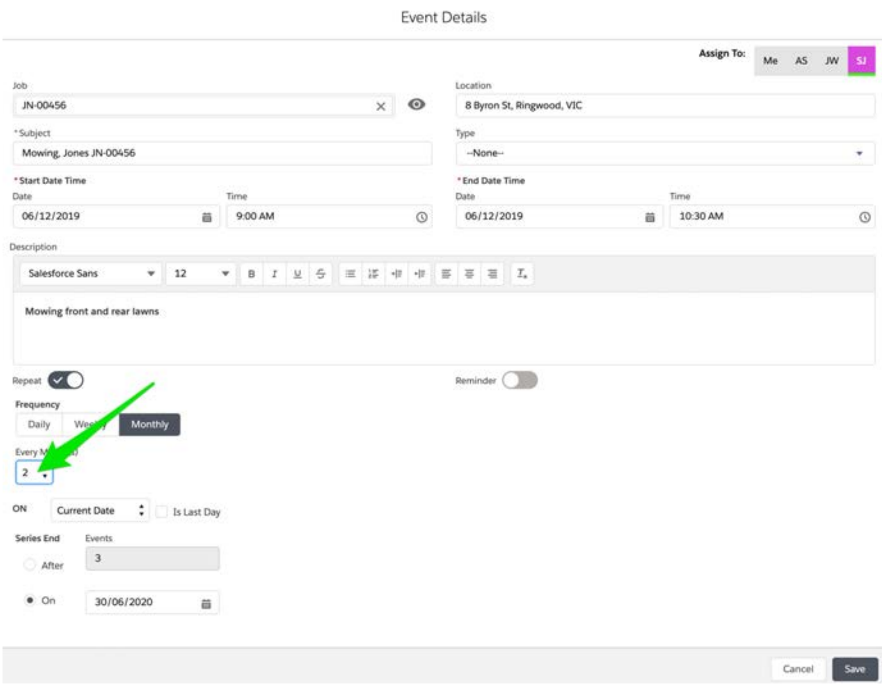
1. To create your first appointment, follow the instructions in "How to schedule a new appointment" on page cxcviii. (Stop before you click **Save**.) Your Event Details dialog will look something like this.



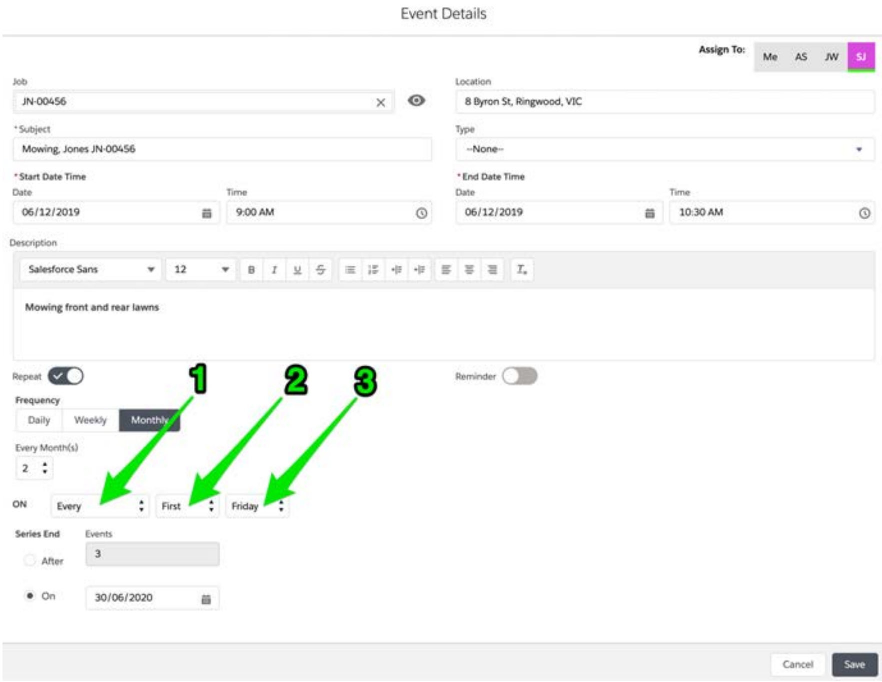
2. To set up the repeating series, press the **Repeat** button, then choose the **Monthly** option.



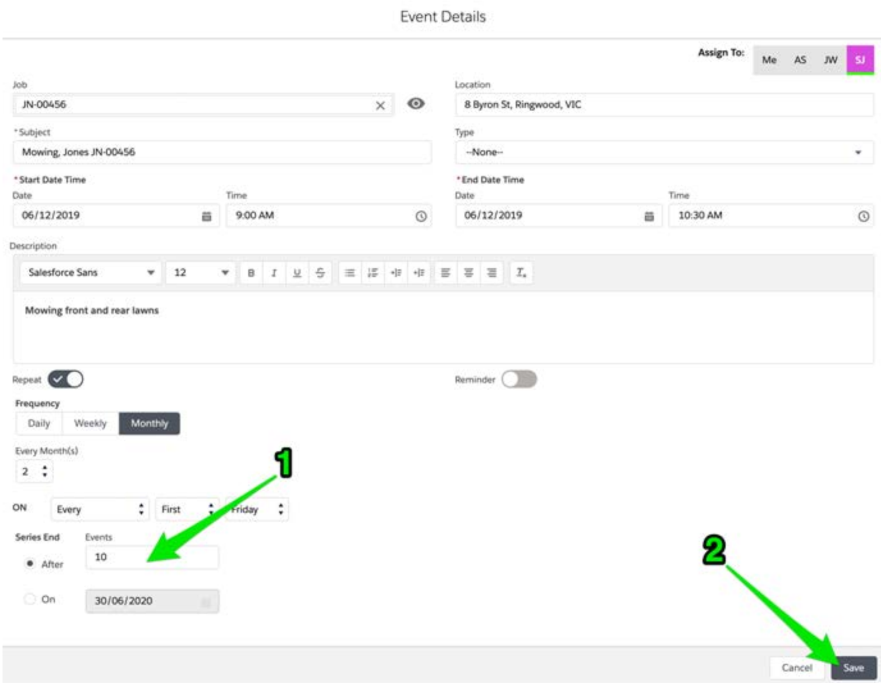
3. Choose your monthly interval. Let's decide to visit every second month.



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.



5. Choose when the series will end. When you're finished, press **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`.

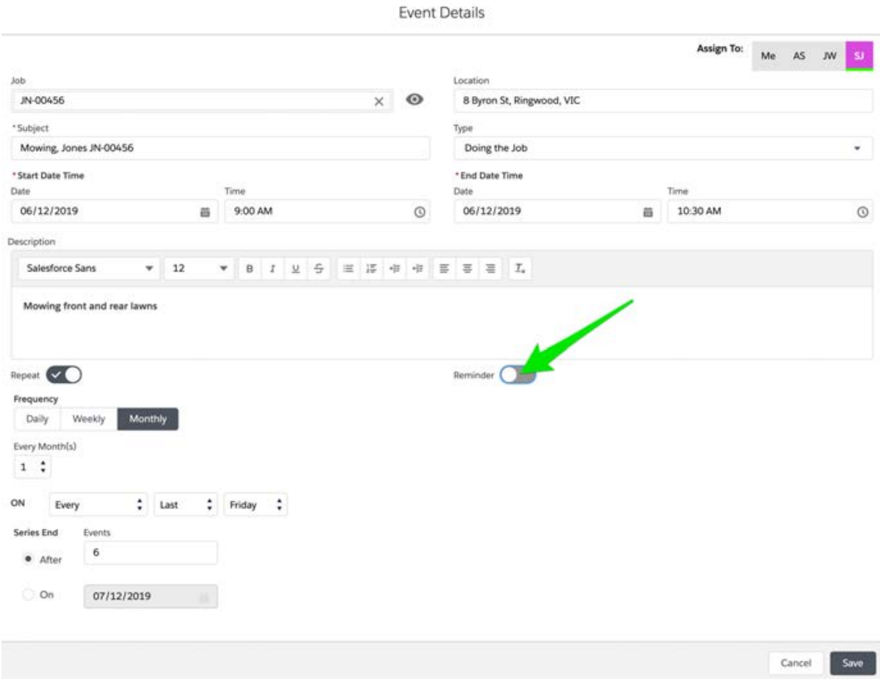
When you have marked a `Repeating Job`, you can invoice the job repeatedly, producing a series of invoices against the one **Job**. If the **Job Plan** changes over time, you can modify it as it changes. Each new invoice will reflect changes in the **Job Plan**.

How to set appointment reminders

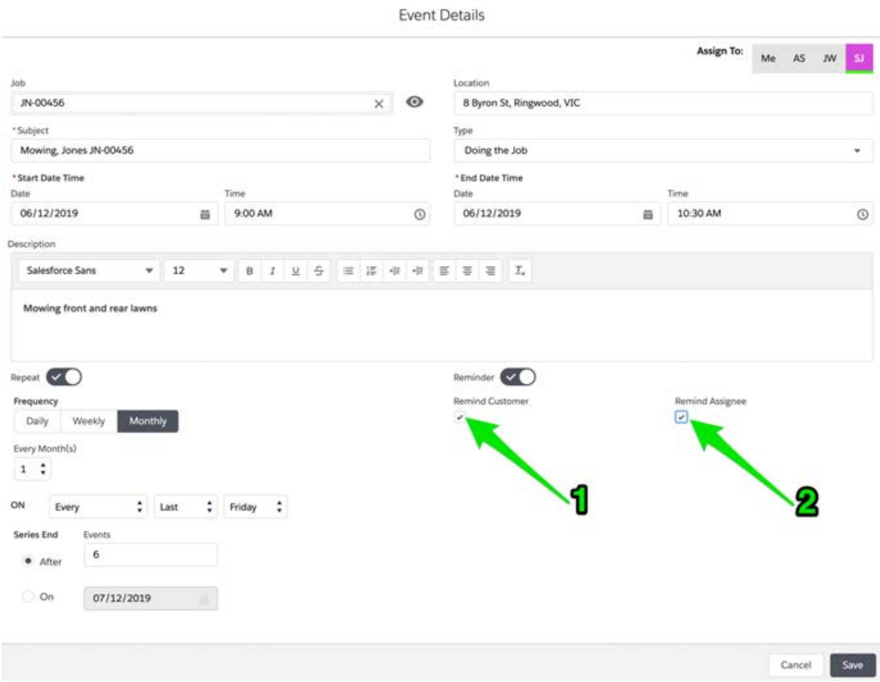
Most businesses now send friendly messages to customers to remind them of their upcoming visit. Business Management has the ability to send SMS messages to customers and your own assigned resources.

To send SMS reminders

1. From the **Event Details** dialog, press the **Reminder** button.



2. Now choose to either **Remind Customer**, **Remind Assignee**, or both.



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 blockout 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 blockout period

There is a reminder blockout 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 blockout 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 blockout 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.

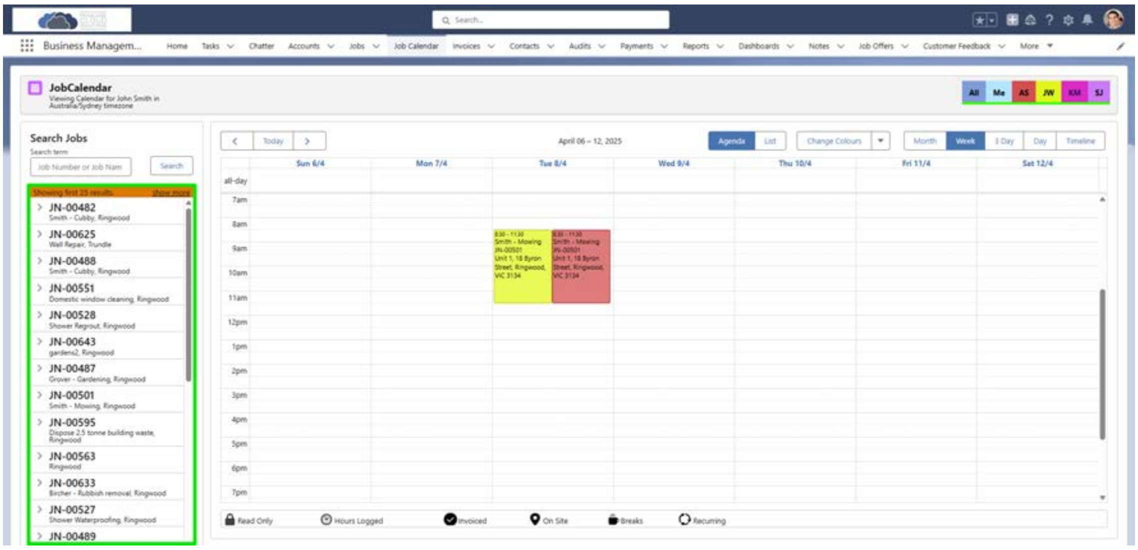
> Non-job appointments can include
>
> - Private appointments
> - Personal leave
> - Annual holidays
> - Lunch breaks

How you create your non-job appointments depends on whether they are standalone or repeating

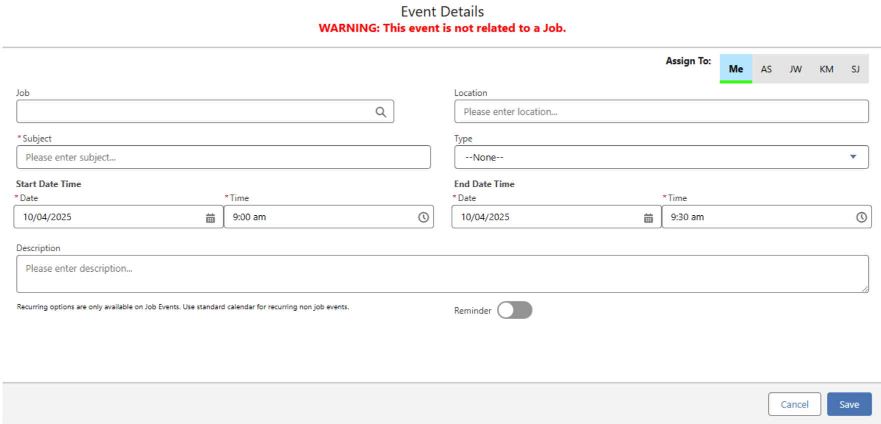
- Standalone appointments can be created on either the Job Calendar or the Calendar.
- Repeating appointments must be created on the Calendar.

To add a standalone non-job appointment

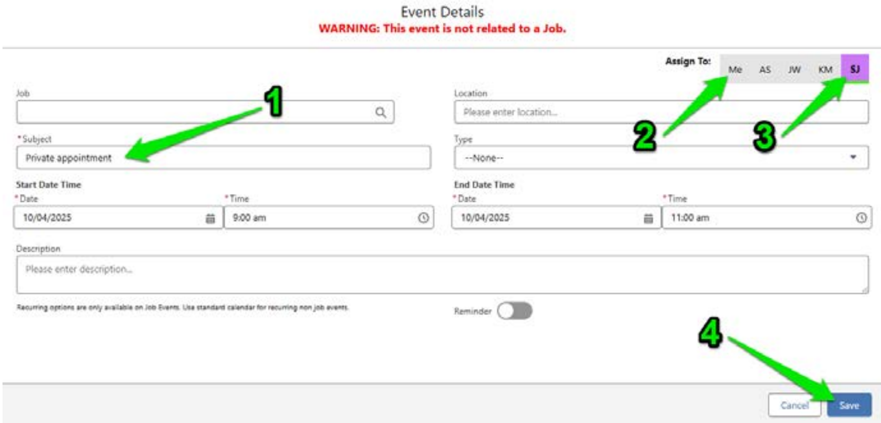
1. On the Job Calendar, ensure all Jobs in the Search Job pane is closed.



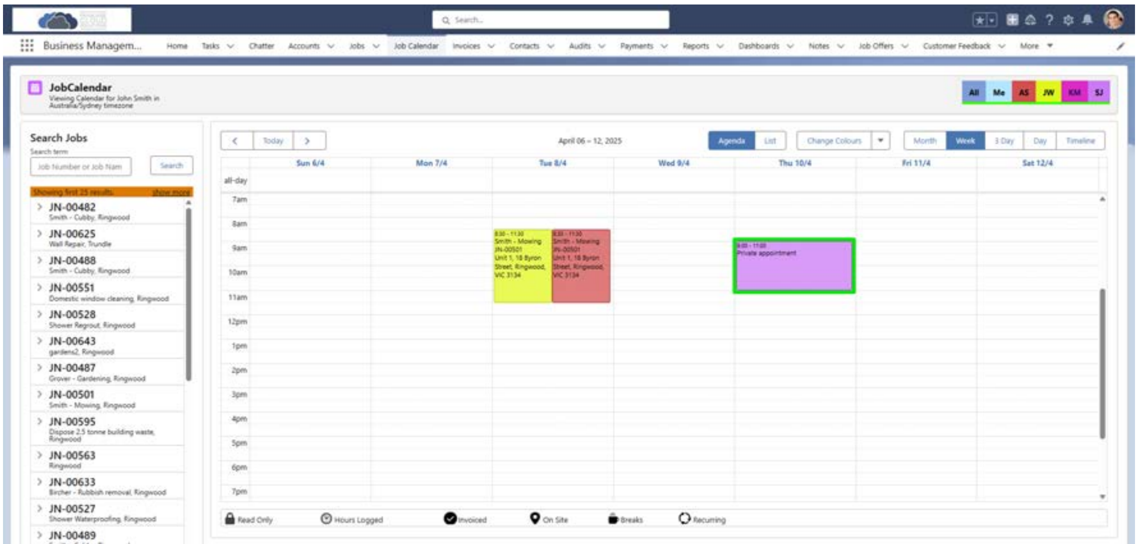
2. Now click on any empty location in the calendar. The event dialog box will appear.



3. Complete the **Event** dialog box then press **Save**.

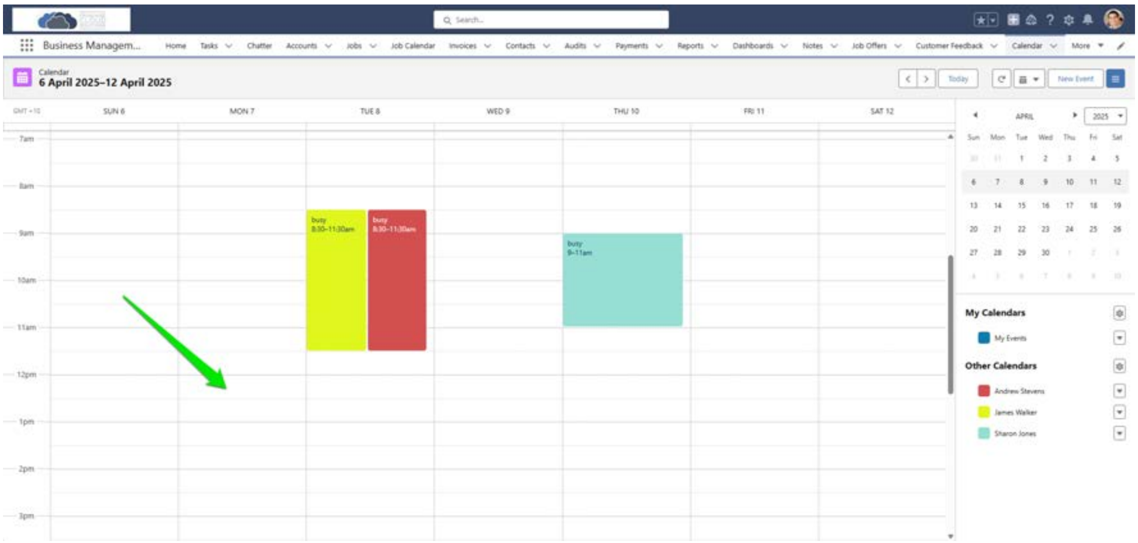


4. The appointment (not related to any job) is now placed on the Job Calendar.

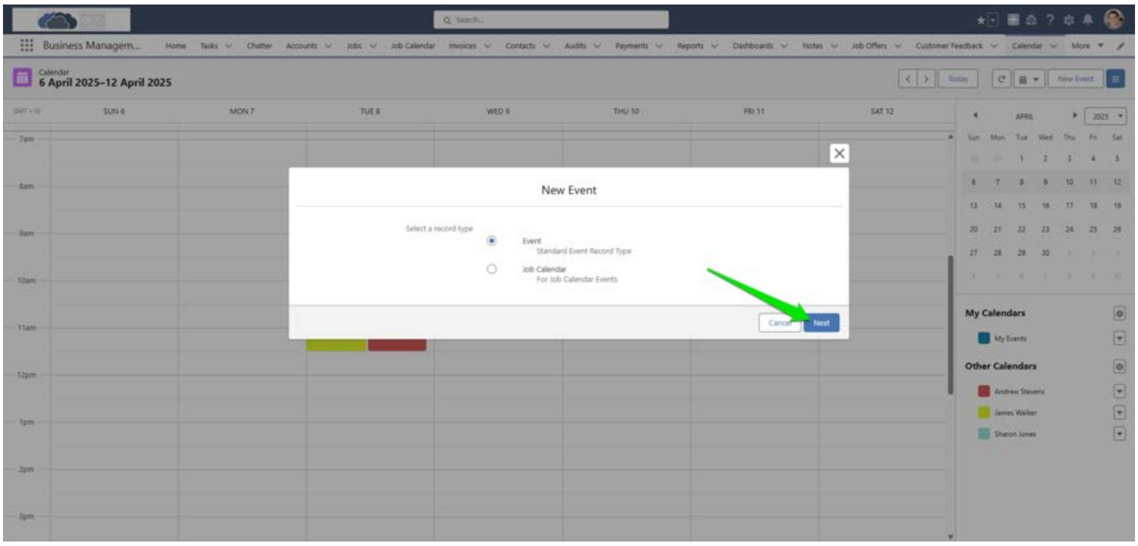


To add a repeating series of non-job appointments

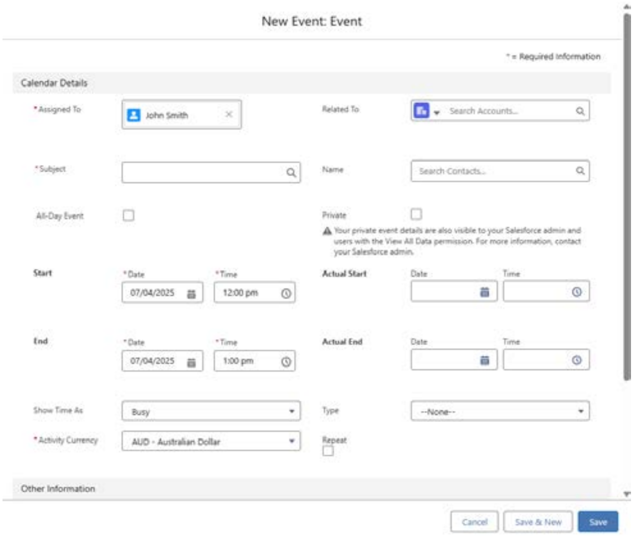
1. On the Calendar, click on any empty location.



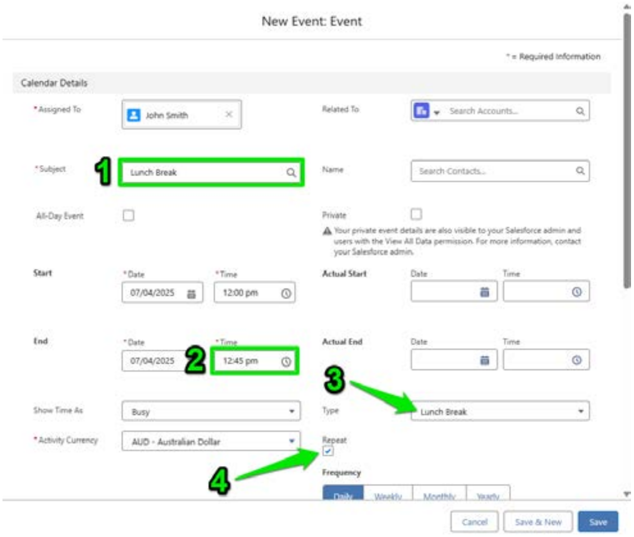
2. The New Event dialog asks you to select which Event type is to be created. Ensure it is the `Event` type and click **Next**.



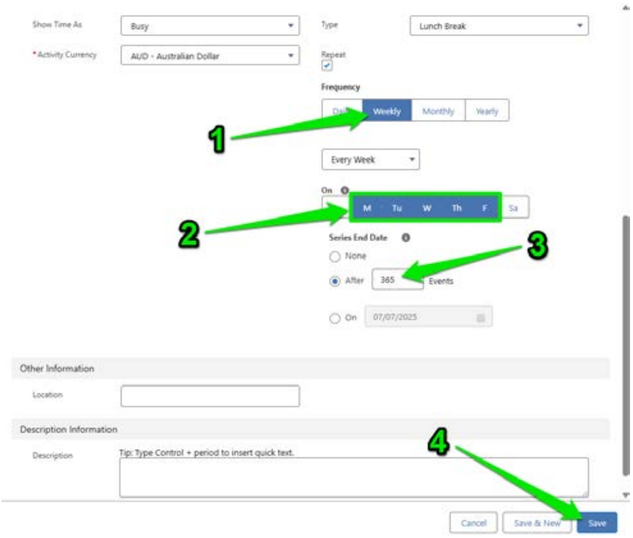
3. The **Event Details** box will appear.



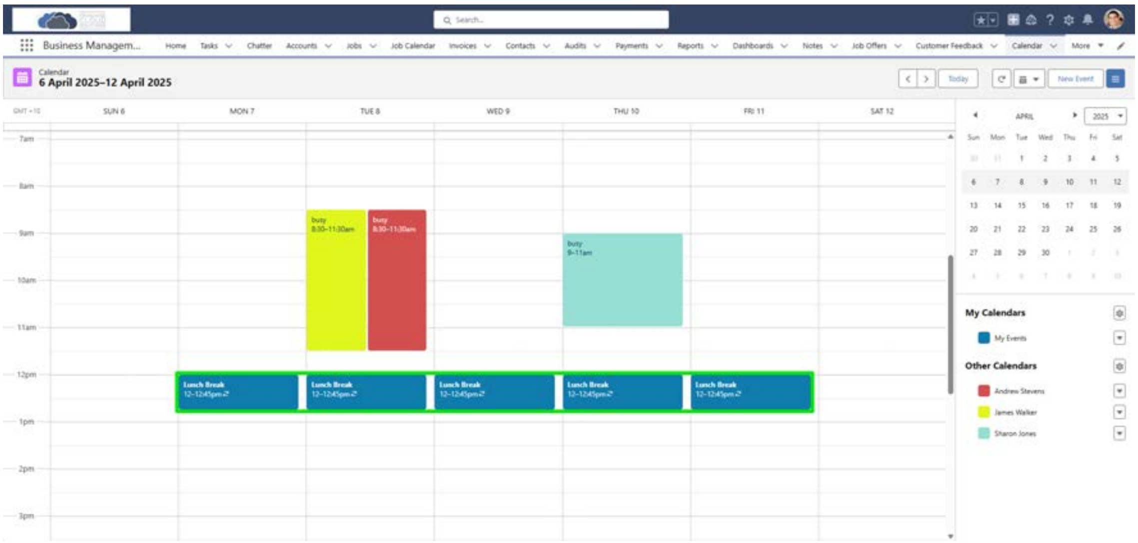
4. Adjust the details as you need, then choose `Type` and `Repeat`.



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



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



> This appointment series will also be visible in Job Calendar.

Adjusting appointments

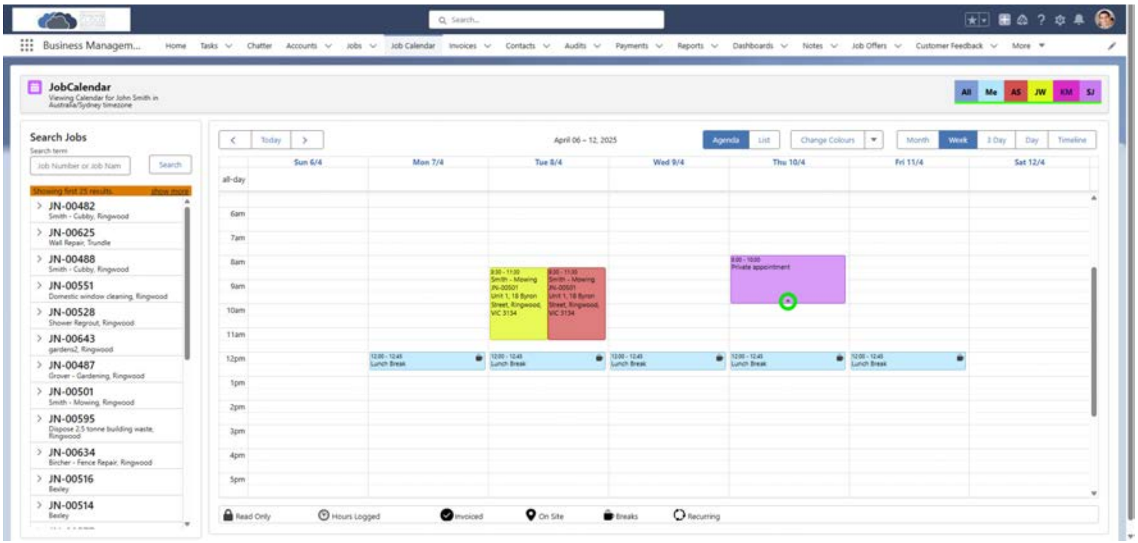
How to change the length of an appointment

When you drag a job onto the Job Calendar, it will automatically try to use as many hours from the job as will fit in your work day. You will sometimes choose to shorten the default length of the appointment.

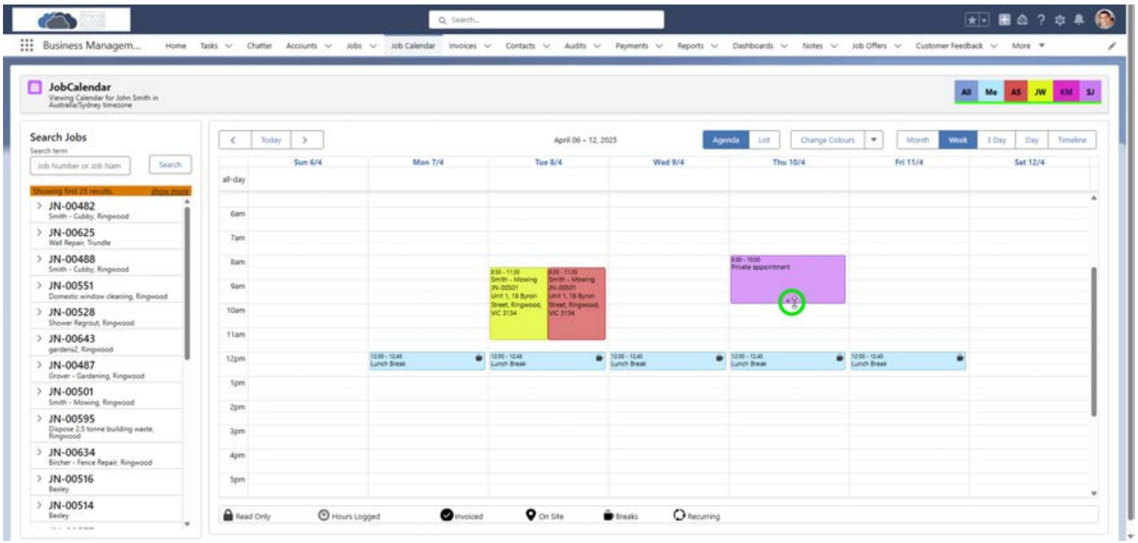
While you can do this within the Event dialog box, it is often quickest and easiest to shorten the length of an appointment by dragging and dropping the appointment on the calendar.

To change the length of an appointment on the calendar

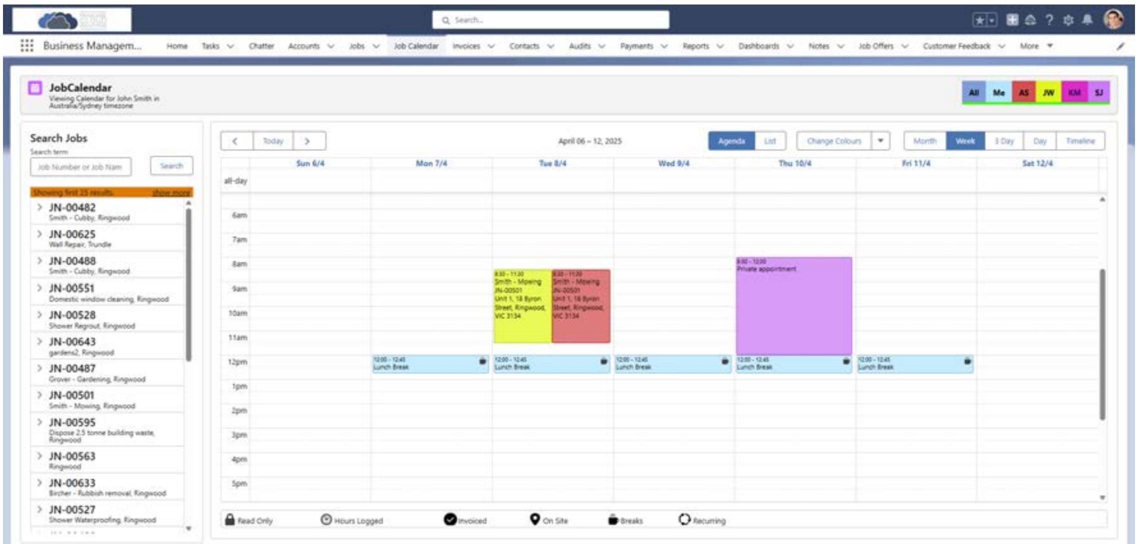
1. Hover your mouse over the top of a calendar appointment. A grab handle will appear at the bottom of the appointment.



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



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



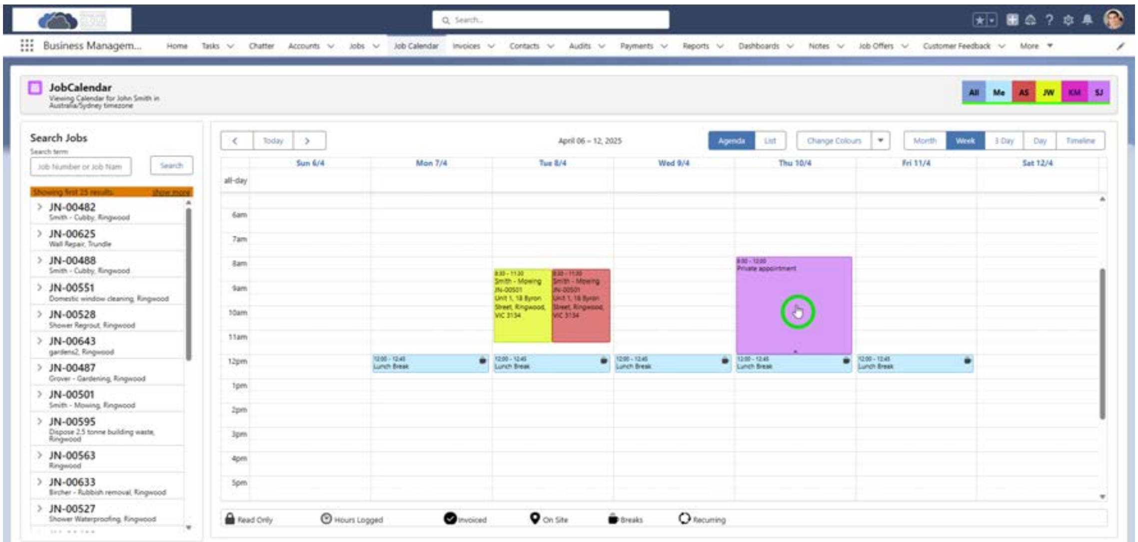
> There is one extra step when the appointment is part of a series of repeating events, *See* “How to adjust appointments in a repeating series” on page ccxxx.

How to move an appointment

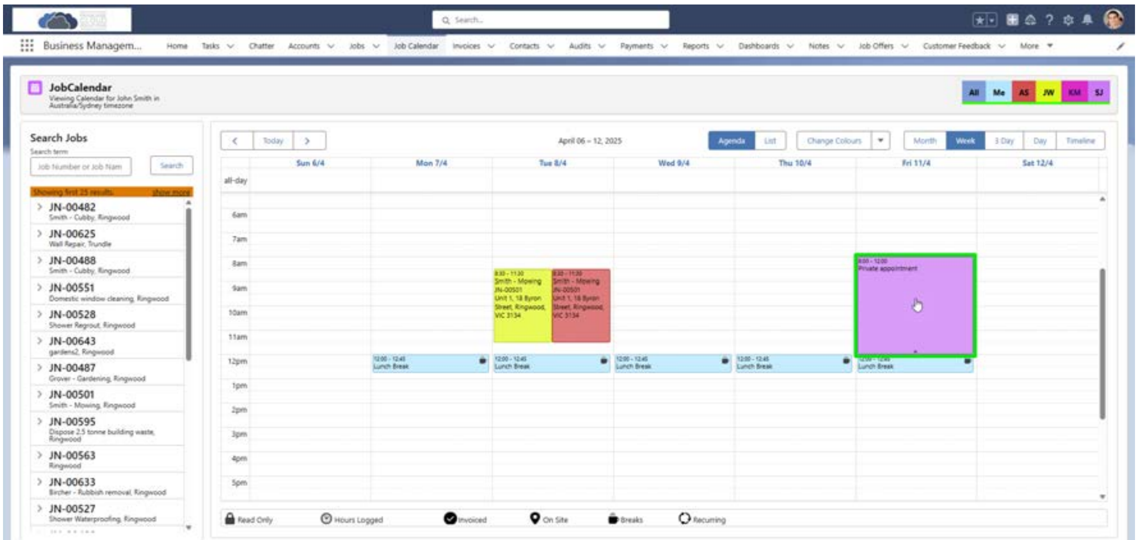
When an appointment is already on the calendar and you need to move it, doing so is as simple as drag and drop.

To move an appointment on the calendar

1. Hover your mouse over top of a calendar appointment. Your mouse pointer will turn into a hand.



2. Now press down and drag (left mouse button) the appointment to its new location. Release the mouse button.



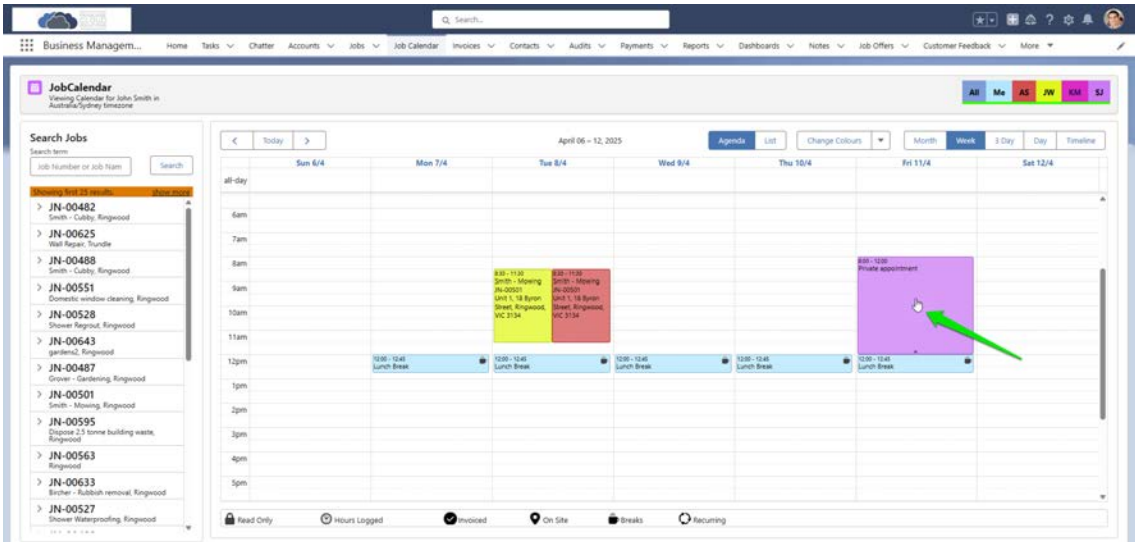
There is one extra step when the appointment is part of a series of repeating events, *See* “How to adjust appointments in a repeating series” on page ccxxx.

How to delete an appointment

Sometimes you need to remove an appointment from the calendar. Doing that is as simple as deleting the appointment.

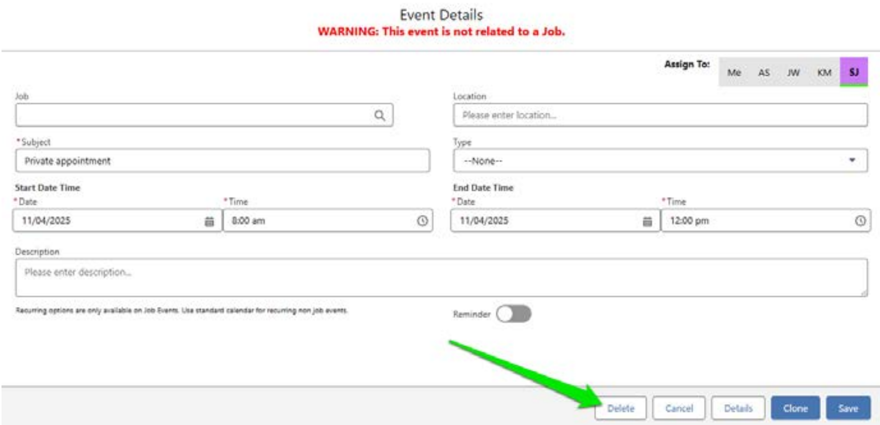
To remove an appointment

1. Find the appointment in the Job Calendar and click on it.



The **Event Details** dialog opens.

2. Press the **Delete** button.



The event is now removed from the calendar.

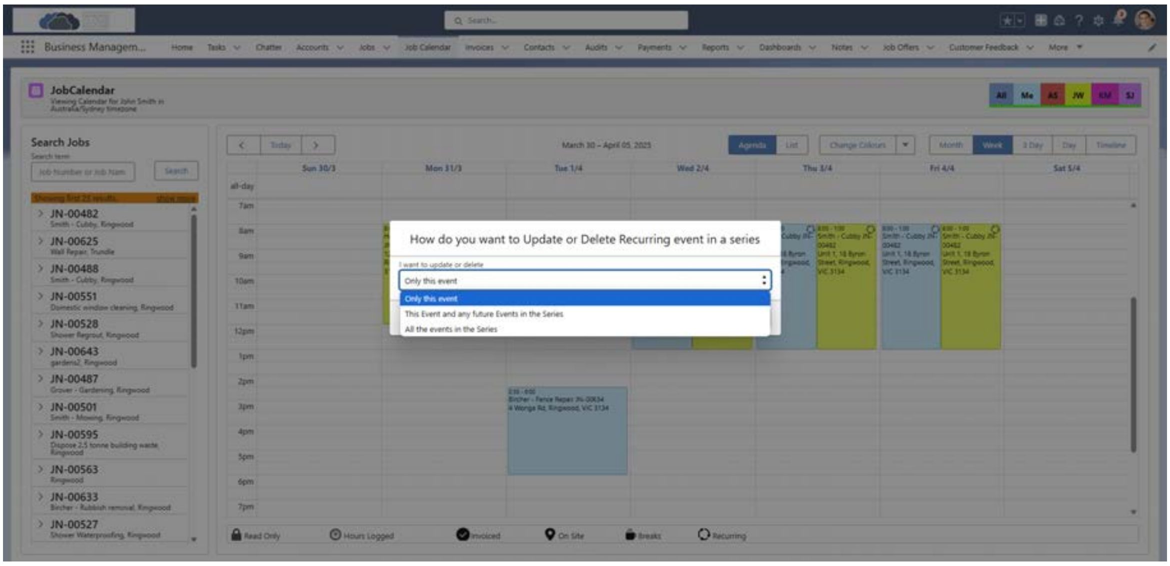
> There is one extra step when the appointment is part of a series of repeating events, *See* “How to adjust appointments in a repeating series” on the facing page.

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 appoint-ment.	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.

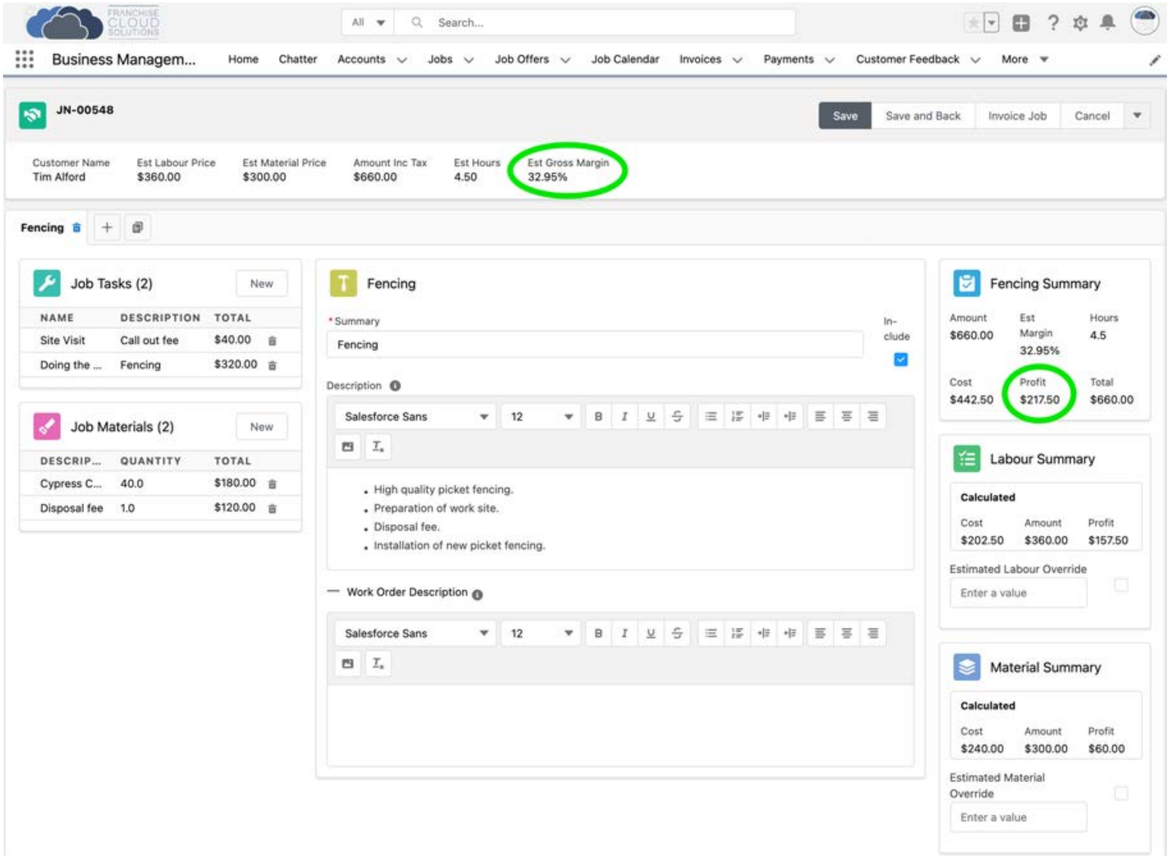
To send a meeting invite or appointment confirmation, your options are

- Send an email confirming the agreed details, or
- Use an external calendaring application such as Google Calendar to send the meeting confirmation

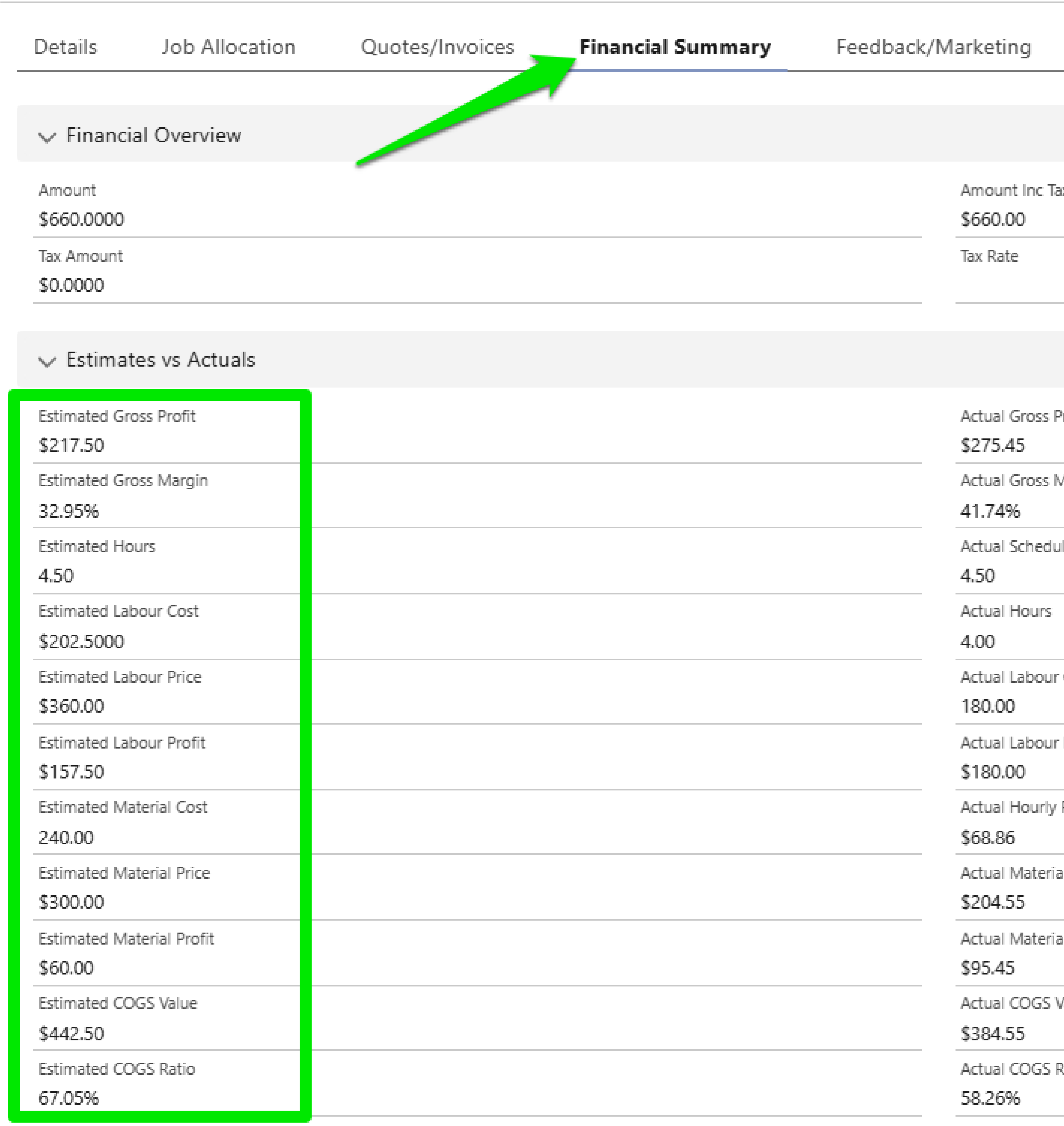
Tracking job profitability

Business Management provides tools to enable job-level profitability tracking.

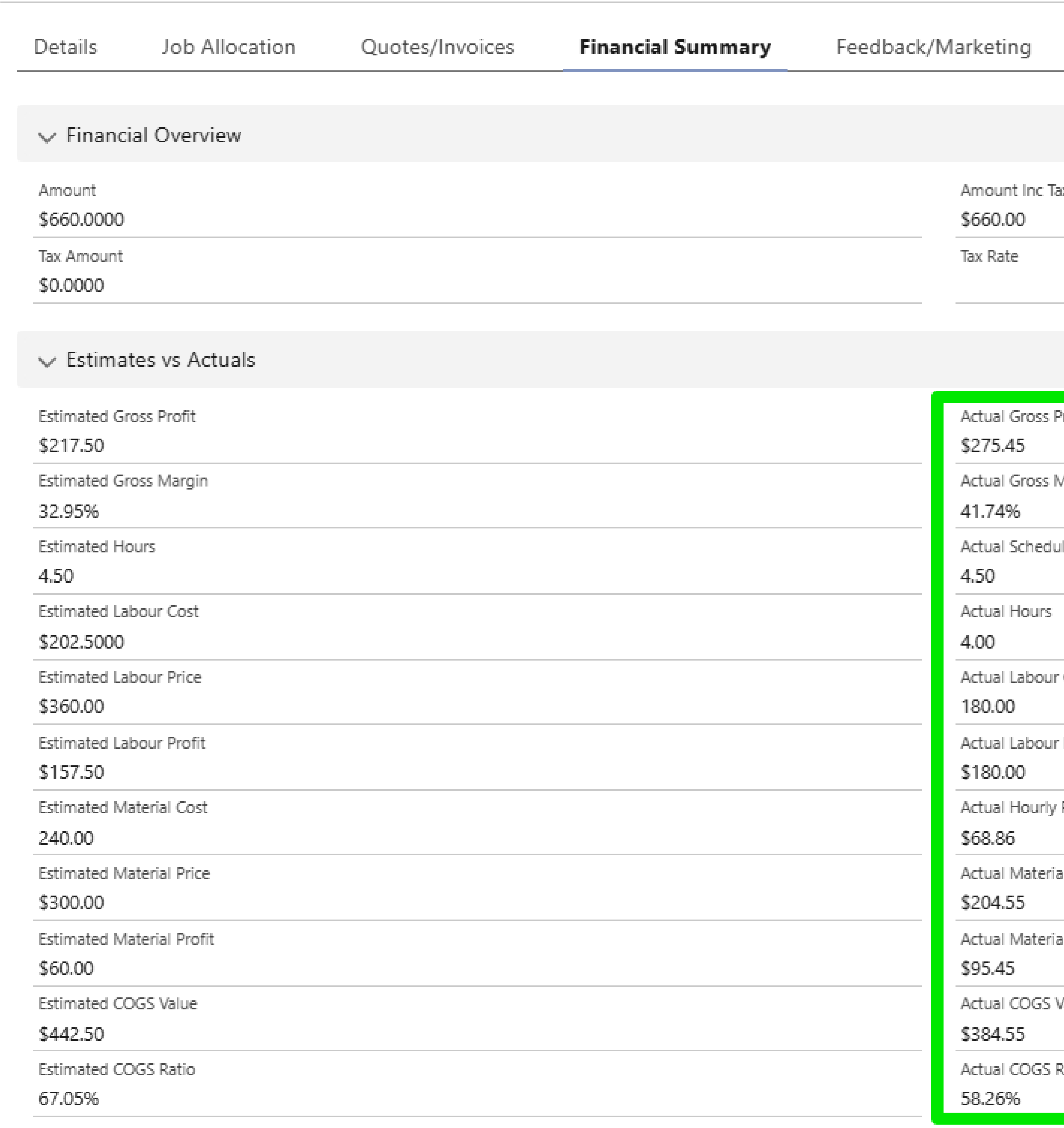
You determine the expected profit contribution and margins using the Job Planning tool. There you can input your expected cost and price for labor and materials. The system can then estimate the expected profitability of the job.



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



Business Management continues to track the profitability of the job when work gets underway. When franchisees or their employees enter materials purchases or labor expenditure, the system tracks these actual expenses against the job.



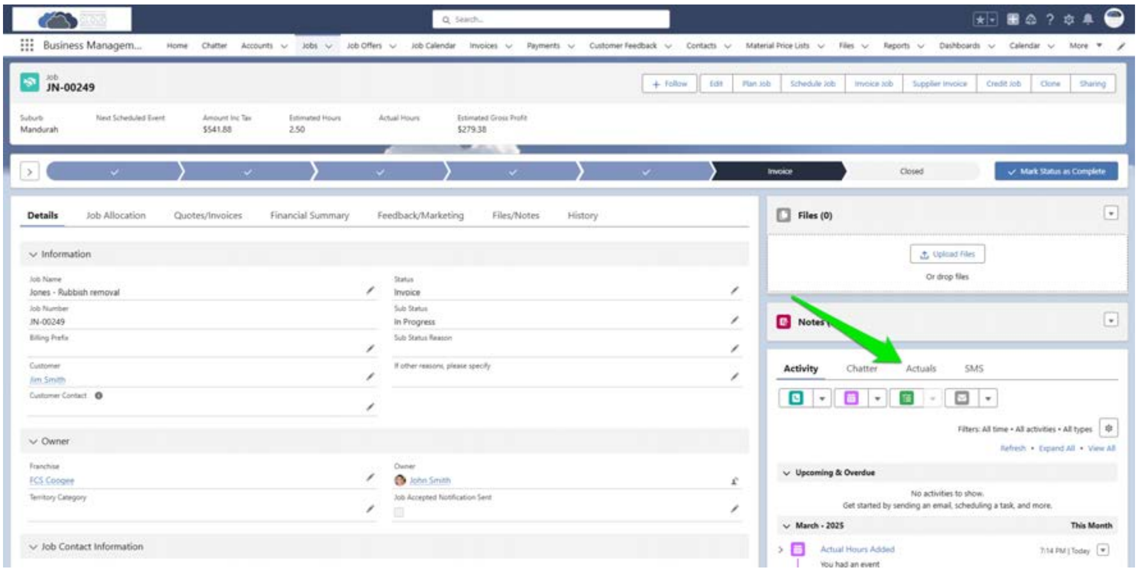
The following topics describe how to log time and materials against a job, so that the actual cost, revenue and profitability of the job is tracked and analyzed.

How to log time against a job

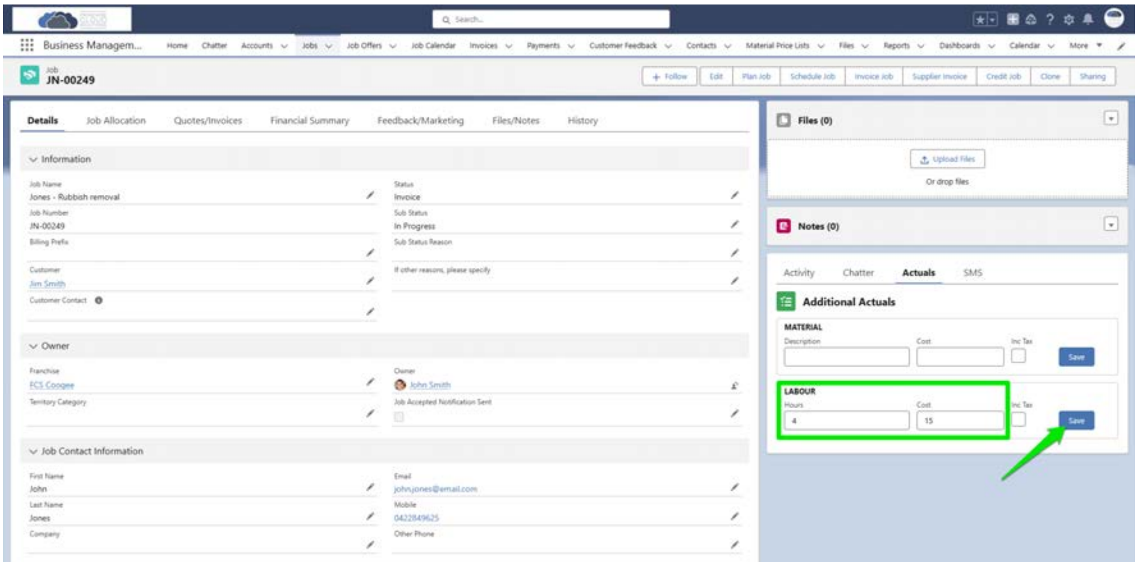
Time can be logged either on-site or by the office. Employees can log time on-site using the mobile app, *See* “Logging time against a job” on page ccxcix. When time isn’t logged on-site, it can be logged by the office.

To log actual hours spent on the job

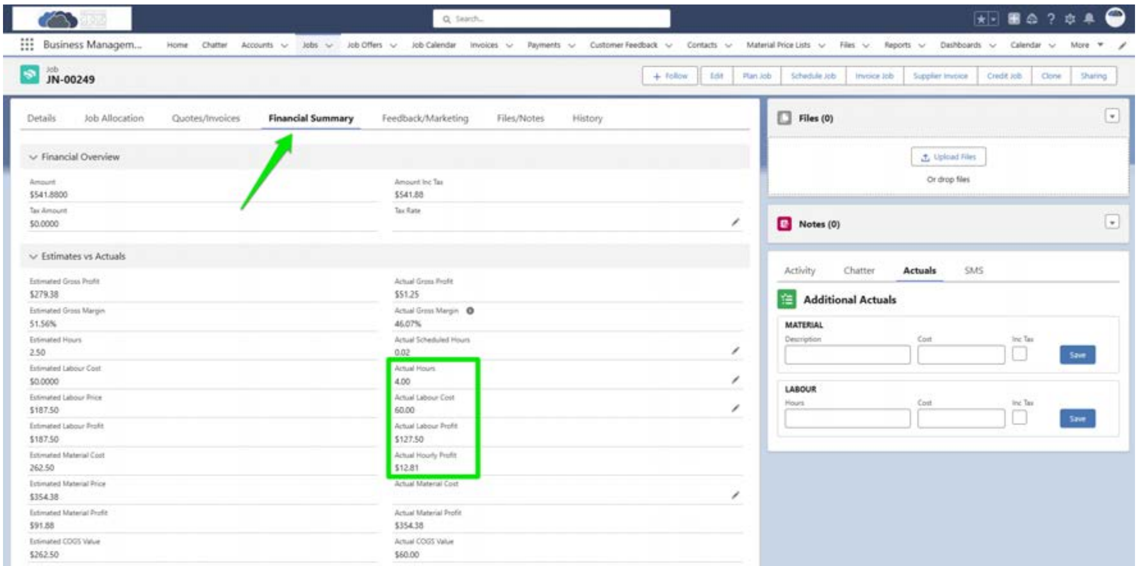
1. From the **Job**, select the **Actuals** pane.



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



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



How to log material costs against a job

There are two methods for entering material costs against a job:

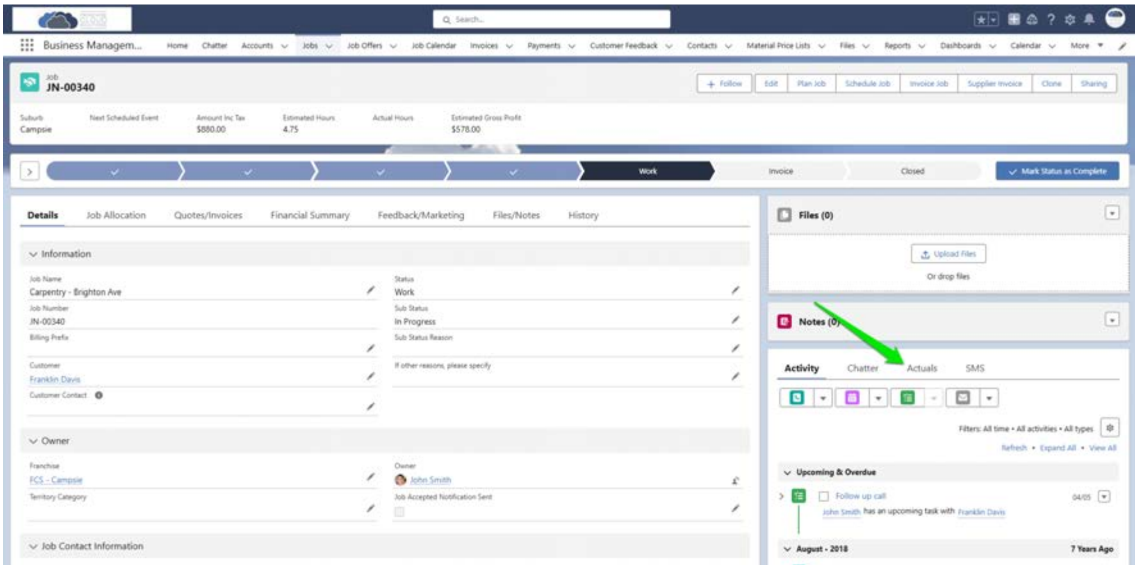
- Actual Material Costs
- Supplier Invoices

> 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.

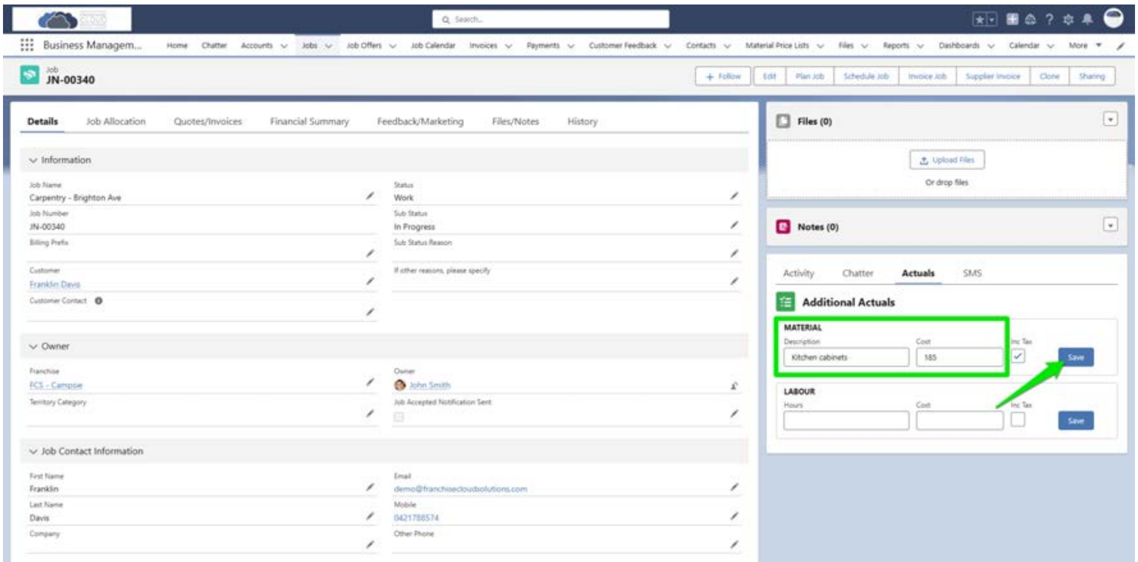
For Supplier Invoice entry, *See* "How to record purchases against a job" on page ccxxxix. This topic describes Actual Material entry.

To rapidly log materials against a job

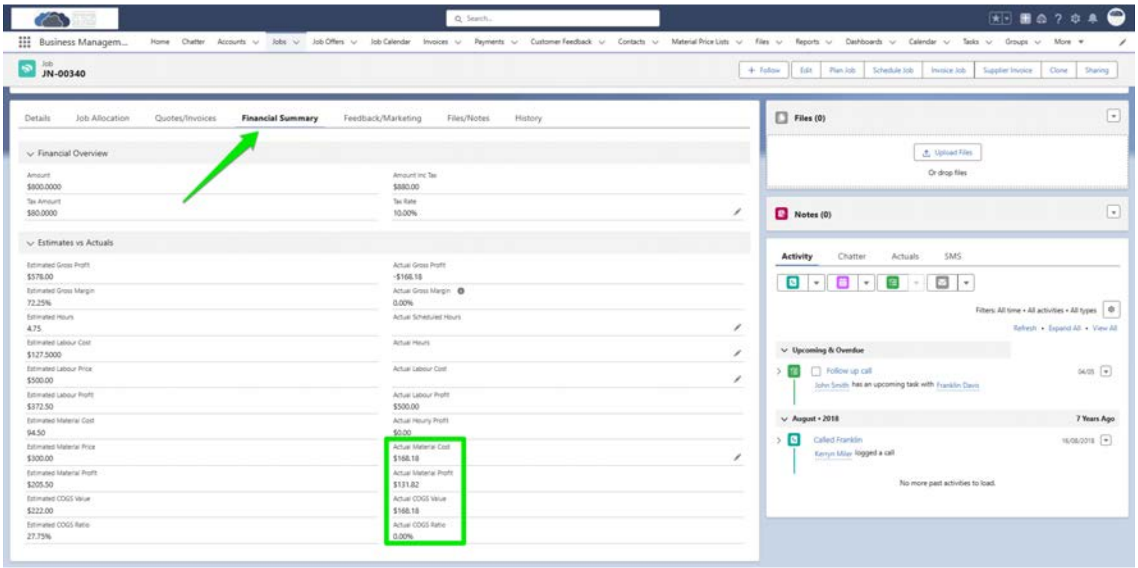
1. From the **Job**, select the **Actuals** pane.



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



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



> 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

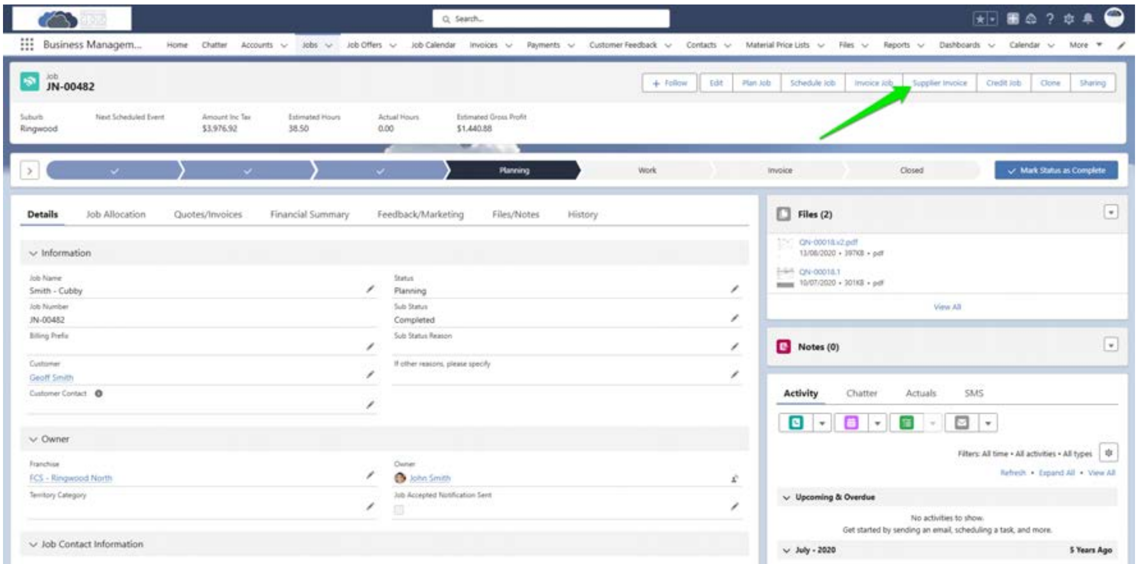
Business Management allows you to associate lines from a supplier invoice against a job. This allows you to track the expenses incurred by particular jobs.

> 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.

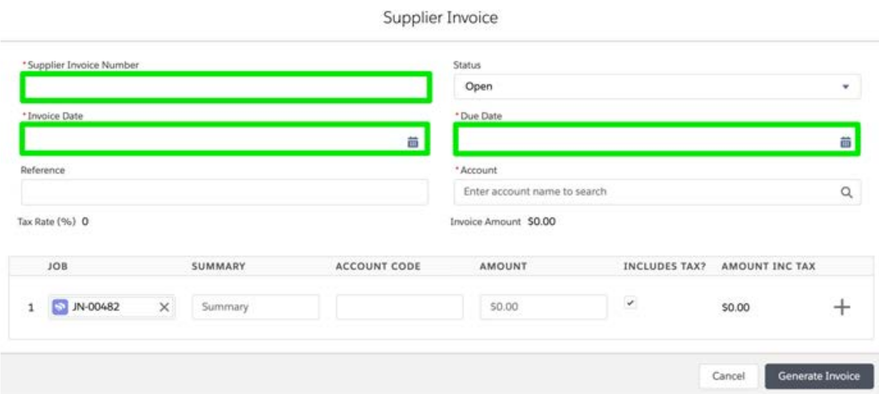
To raise a supplier invoice against a job

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

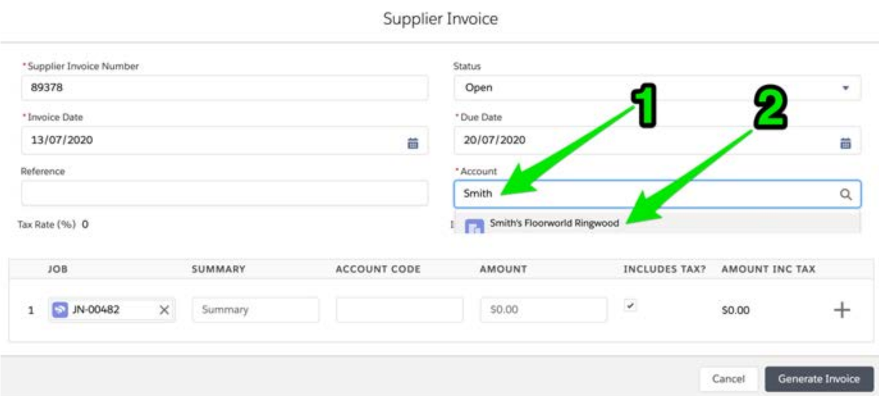


The **Supplier Invoice** dialog box appears.

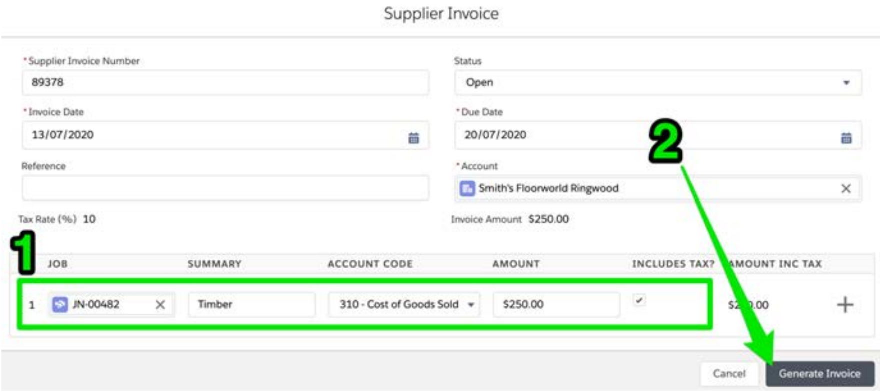
2. Enter the supplier invoice header details.



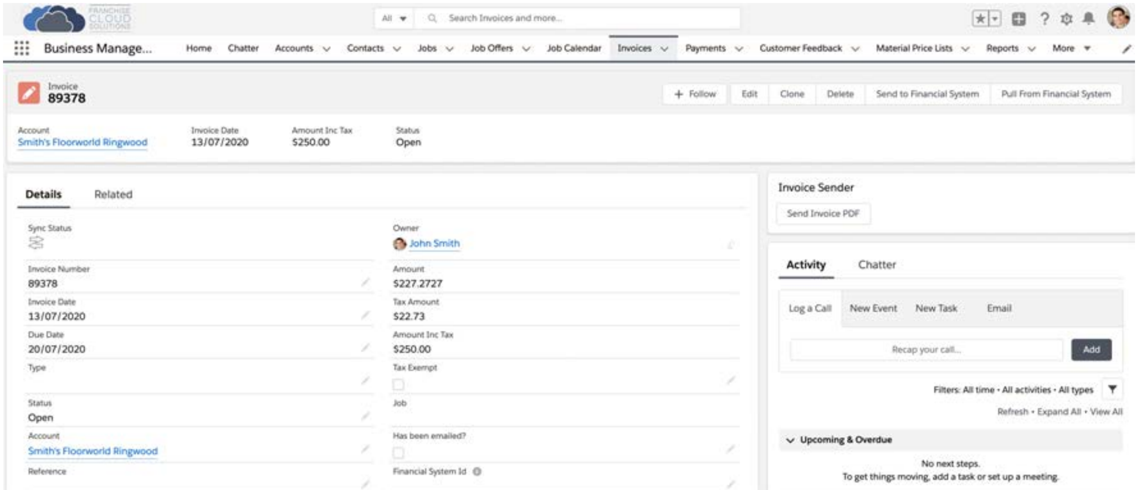
3. Enter the beginnings of the supplier name, and select the supplier from the list of search results.



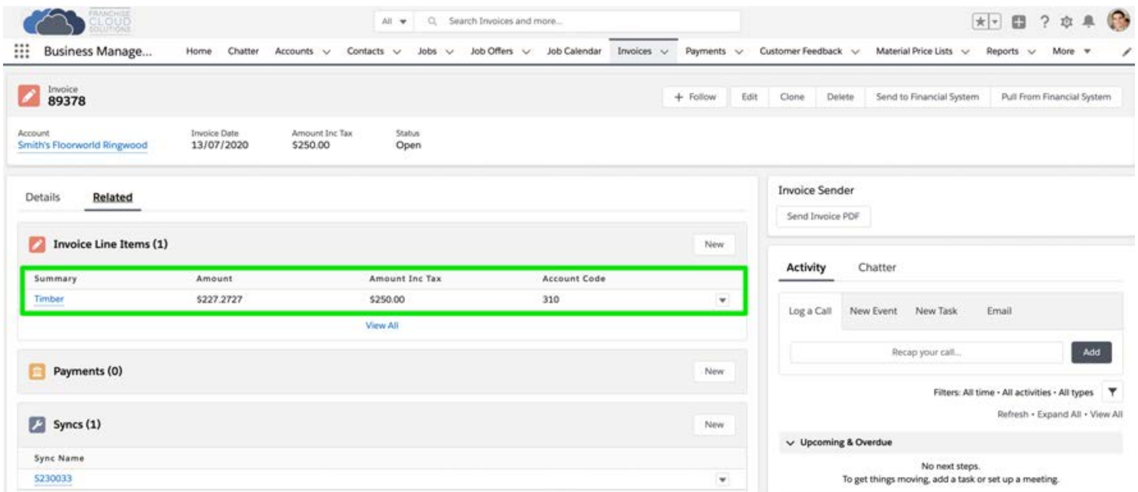
4. Now complete the first supplier invoice line. The Job is automatically selected. Enter a description of the goods in the `Summary`. Choose the `Account Code` if the default mapping is incorrect for this purchase. Enter the `Amount` and then choose whether that amount includes or excludes tax. Click the **+** button for any additional line. When complete, press **Generate Invoice**.



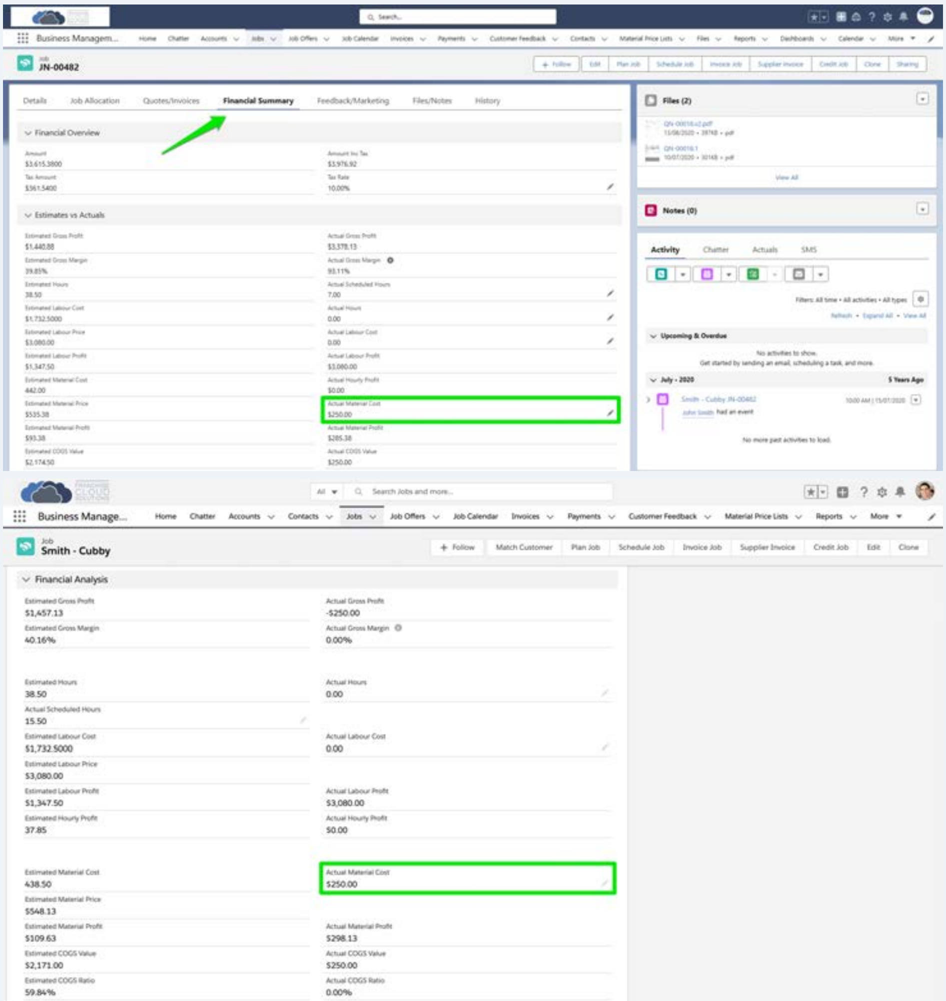
5. The system displays the generated supplier invoice.



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



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.



For a faster method of logging material purchases, *See* "How to log material costs against a job" on page ccxxxvii.

How the system calculates Actual Labour Cost

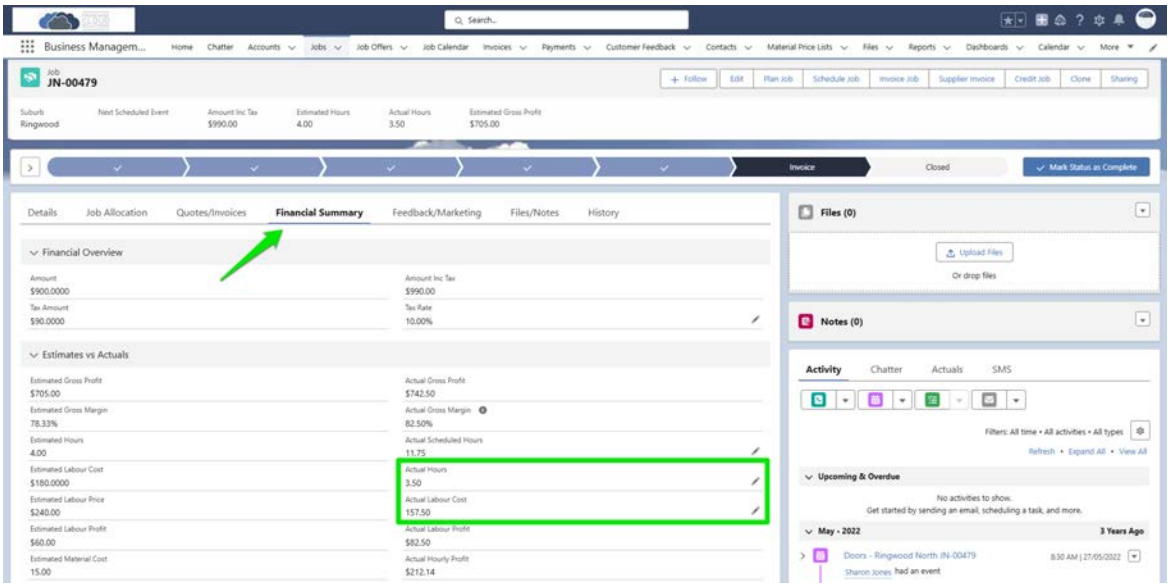
There are two sources for Actual Labour costs:

- 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`.

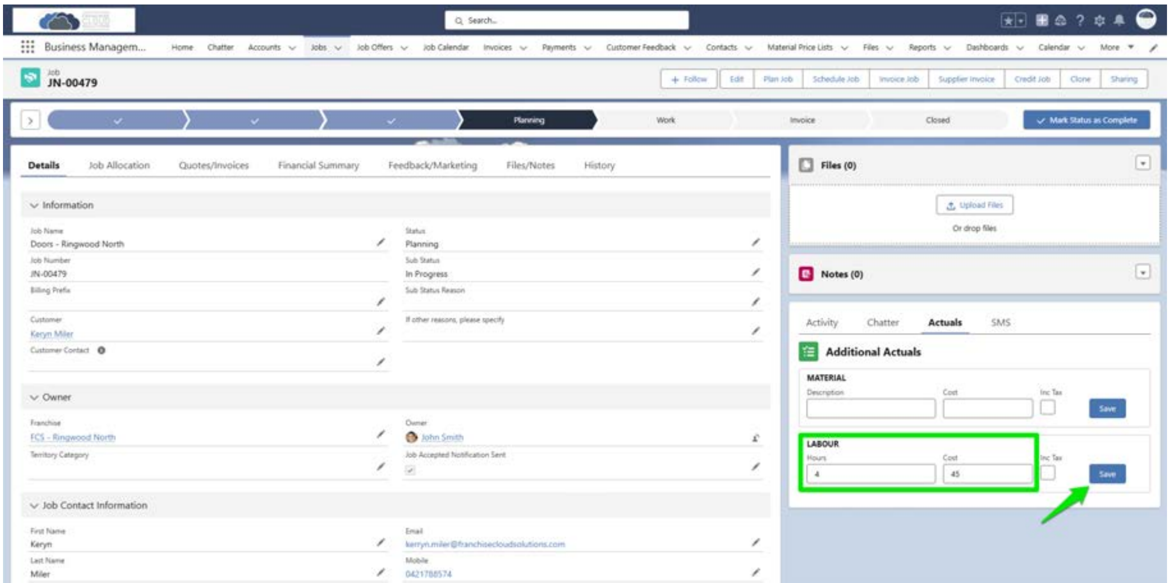


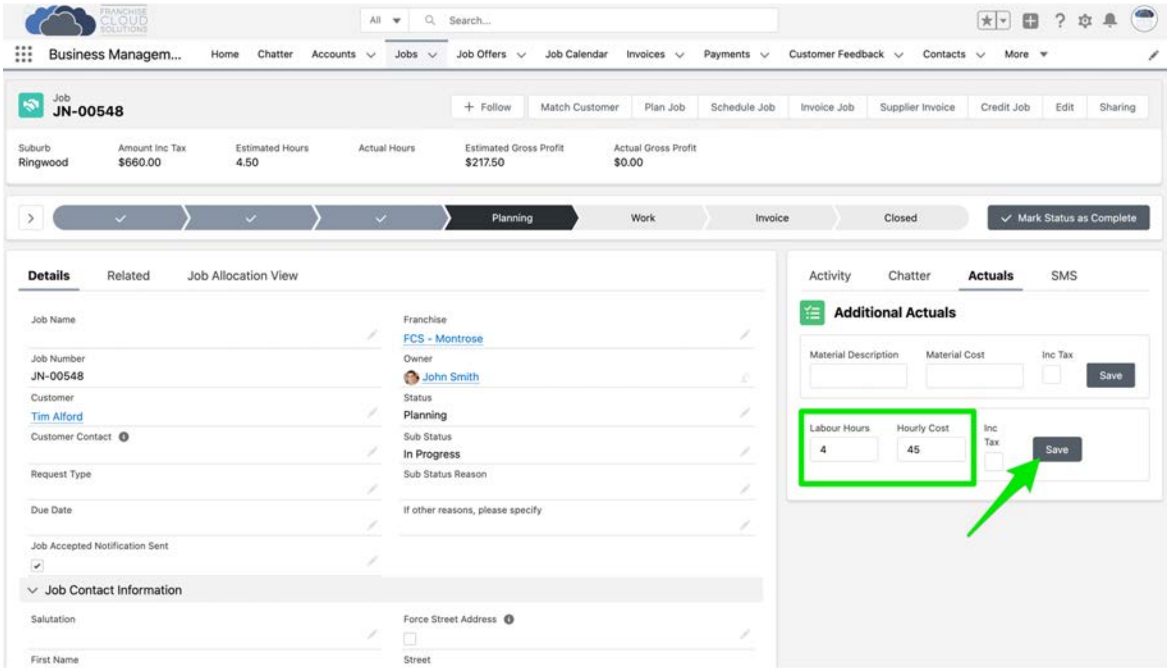
To check the Hourly Rate on a Contact:

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 Managem...
Job
JN-00479
Planning
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
Job Number
JN-00479
Status
Planning
Sub Status
In Progress
Customer
Keryn Miler
Owner
Franchise
FCS - Ringwood North
John Smith
Job Contact Information
First Name
Keryn
Last Name
Miler
Files (0)
Upload Files
Or drop files
Notes (0)
Activity
Chatter
Actuals
SMS
Additional Actuals
MATERIAL
Description
Cost
Inc Tax
Save
LABOUR
Hours
Cost
4
45
Save


Business Managem...
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
Due Date
If other reasons, please specify
Job Accepted Notification Sent
Job Contact Information
Salutation
Force Street Address
First Name
Street
Activity
Chatter
Actuals
SMS
Additional Actuals
Material Description
Material Cost
Inc Tax
Save
Labour Hours
Hourly Cost
Inc Tax
4
45
Save

CHAPTER 8

Working with Invoices, Payments & Credit Notes

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.

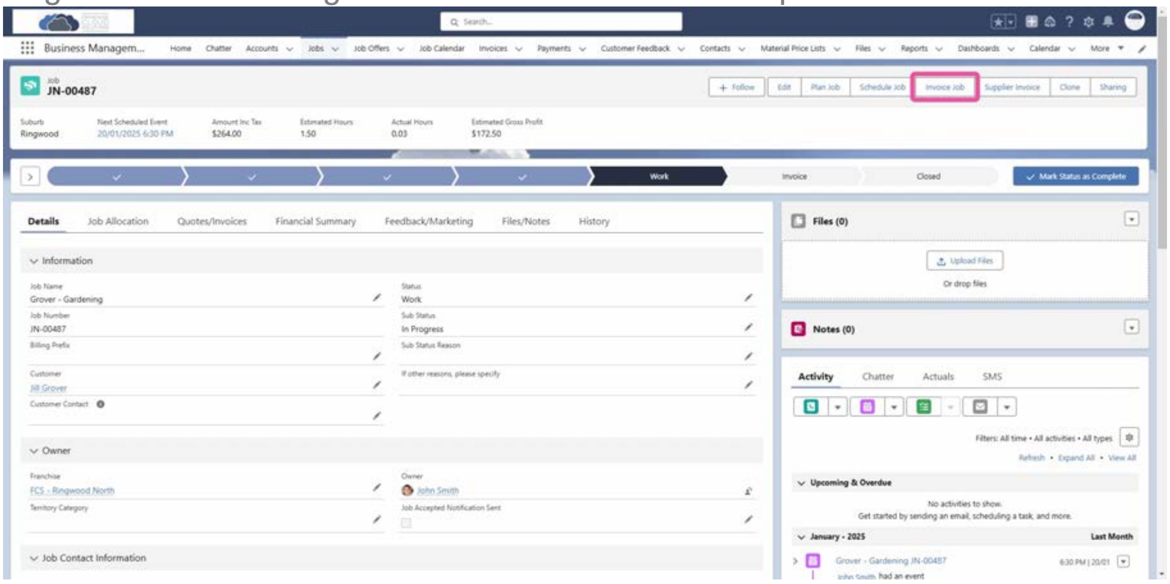
> **Defining terms**
>
> **Payments** are a record of the payments customers make against invoices. Payments are most comfortably handled in Xero.
>
> **Credit notes** represent credits you are providing to your customer. You may issue a credit in order to provide a discount on an existing invoice or 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

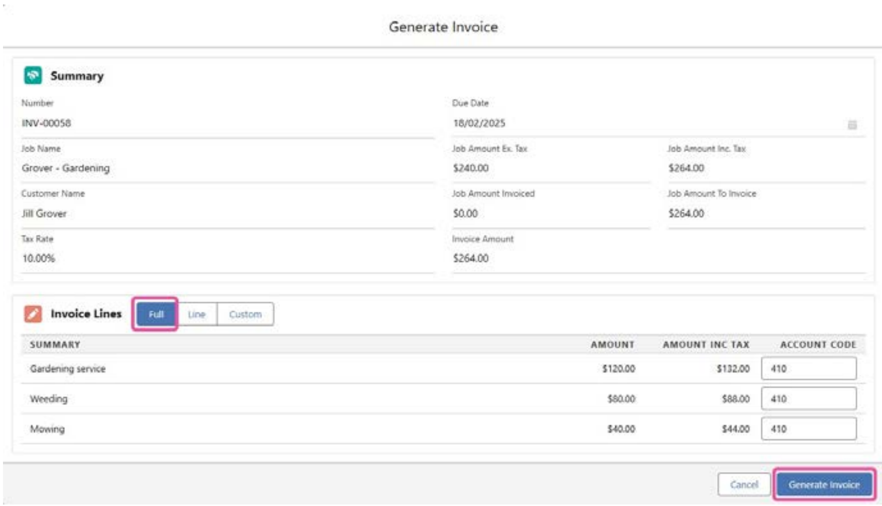
How to generate a full invoice

To generate and send an invoice to a customer

Begin from the **Job** to generate the **Invoice** record as per normal.

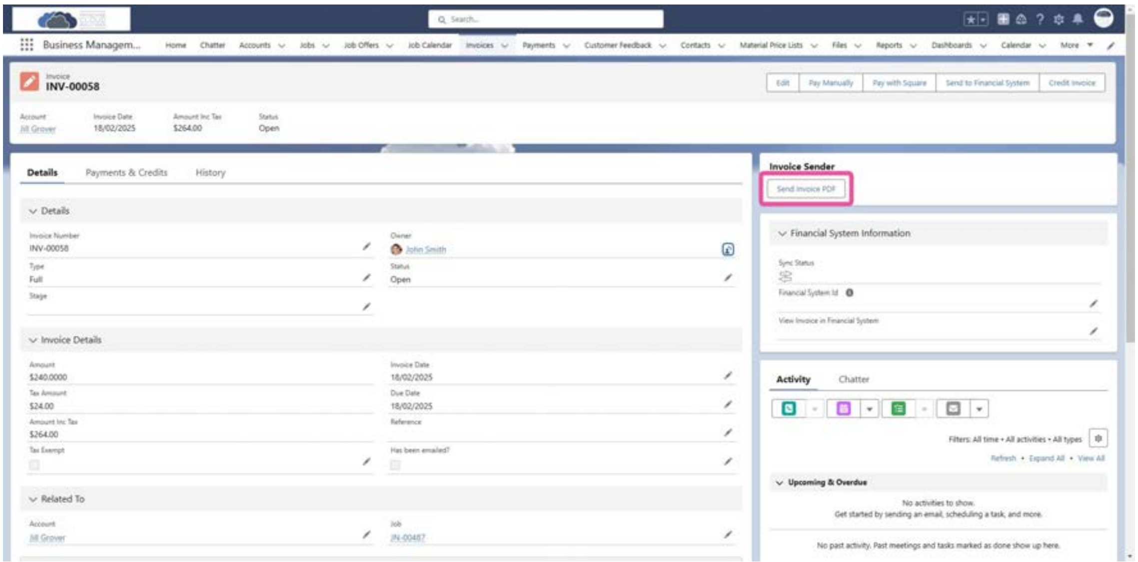


1. The Generate Invoice dialog box appears.
2. Once you have entered your chart of accounts' code for sales, press **Generate Invoice**.



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**.



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.

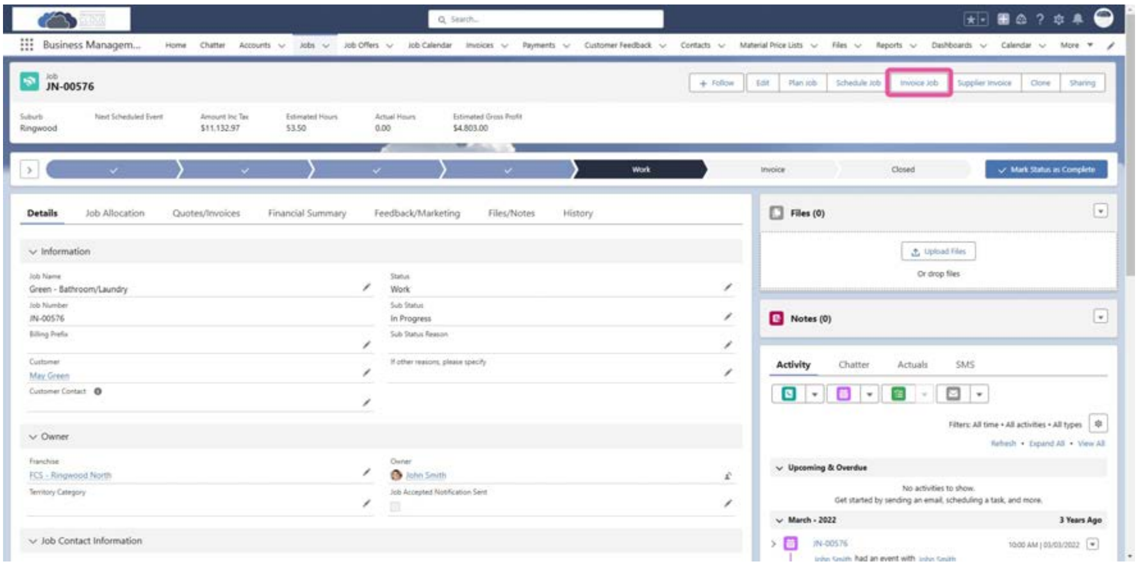
How to generate custom invoices

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.

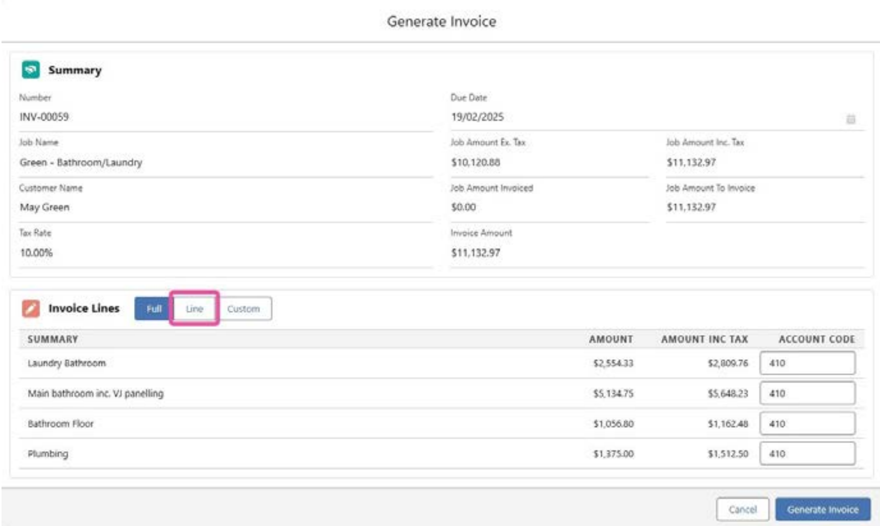
To part invoice by line item

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

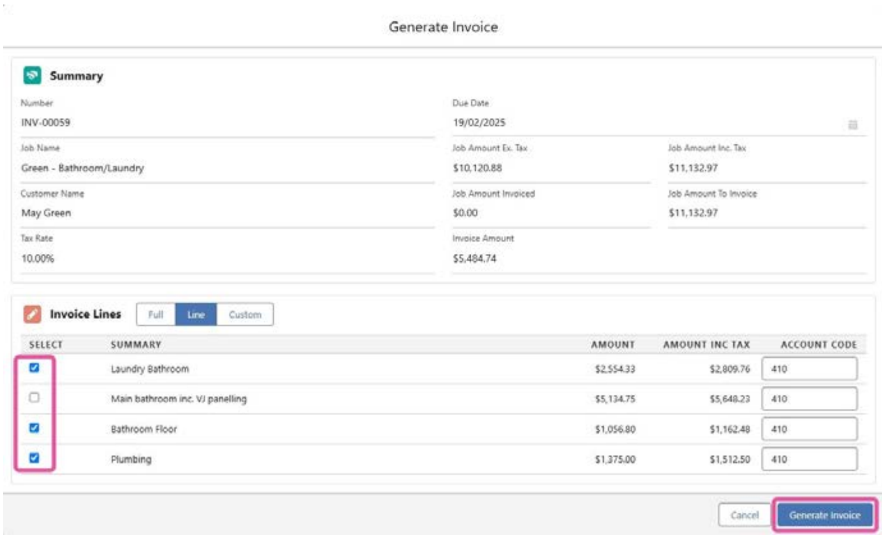


The **Generate Invoice** dialog box appears.

2. Select **Line**.

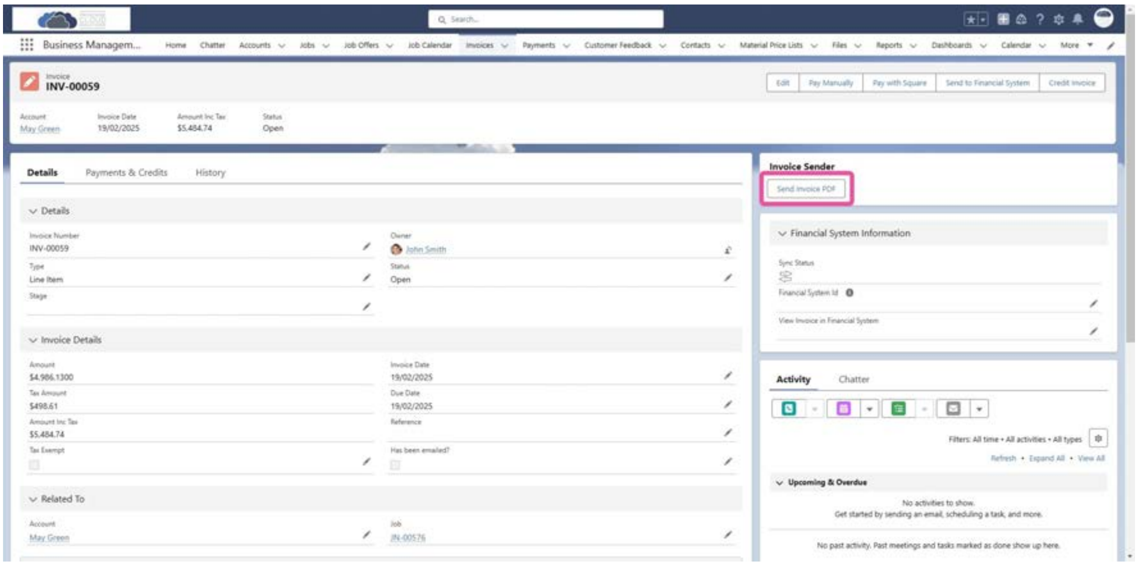


3. Now select the line(s) to be invoiced, then press **Generate Invoice**.



An **Invoice** record appears.

4. Press **Send Invoice PDF**.



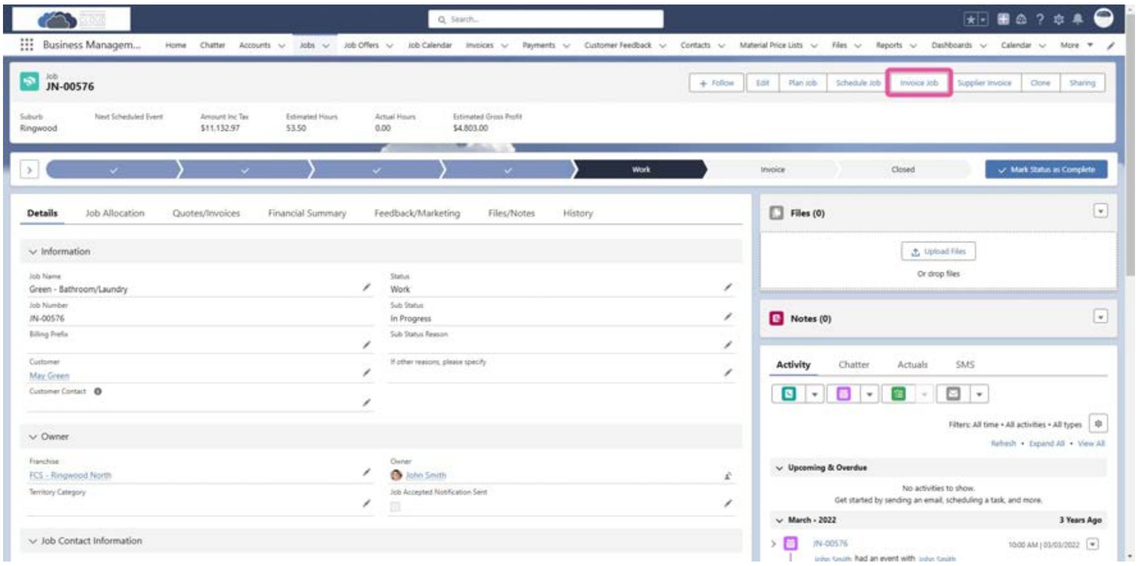
The **Compose Email** box appears.

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.

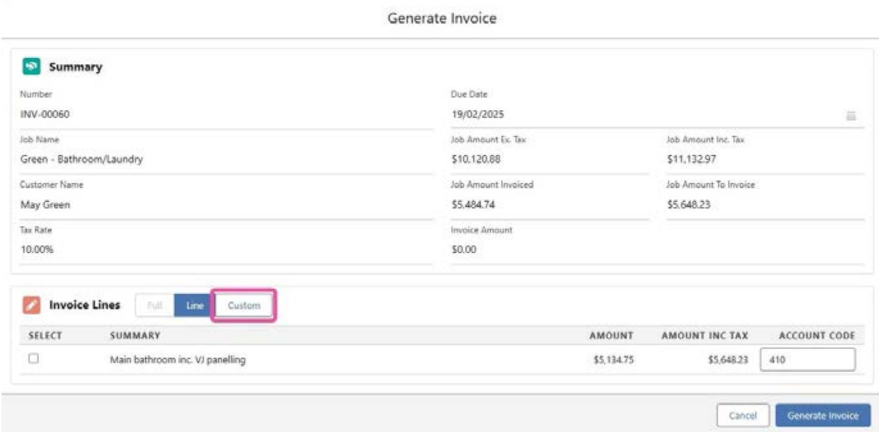
To part invoice a deposit or progress payment

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

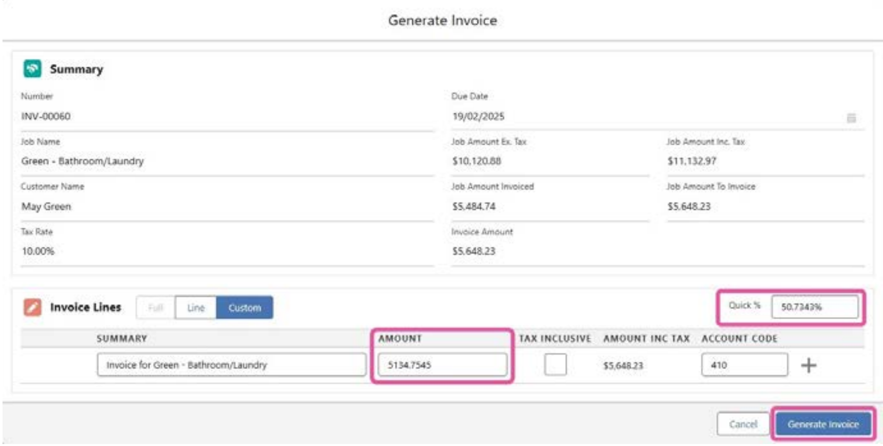


The **Invoice** dialog box appears.

2. Select **Custom**.



3. 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**.



An **Invoice** record appears.

4. Press **Send Invoice PDF**.

   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.

> 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

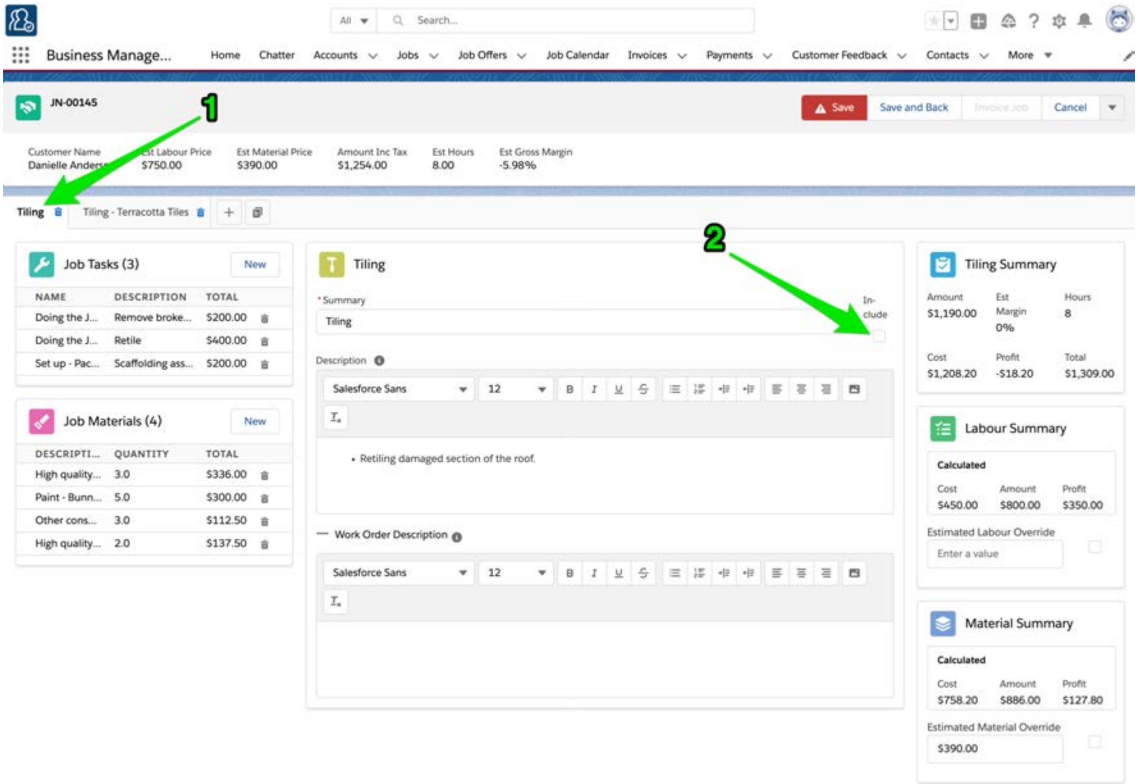
From time to time you will provide a quote with multiple line items and the customer will choose to proceed with only some of the line items.

To reflect the change in the value of the job, you will need to exclude some line items.

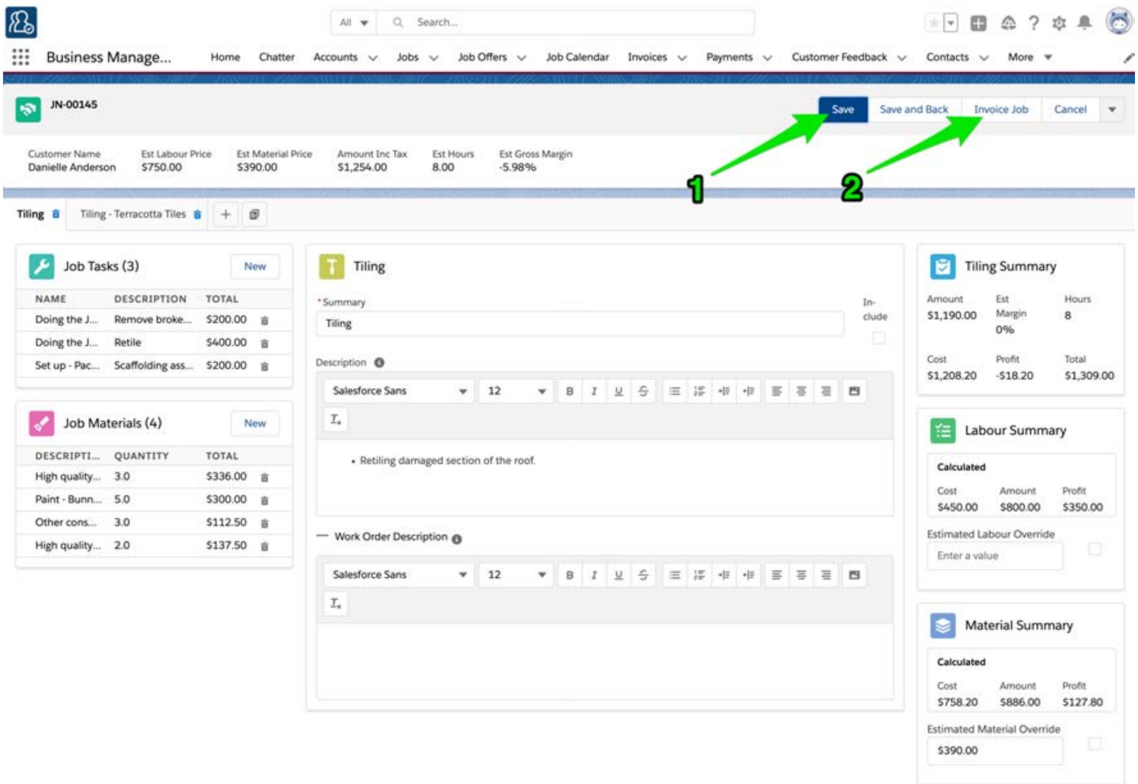
To exclude a line item from the invoice

1. In the Job, click on **Plan Job**.

2. Locate the line item you wish to exclude and uncheck the `Include` checkbox.



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



> 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:

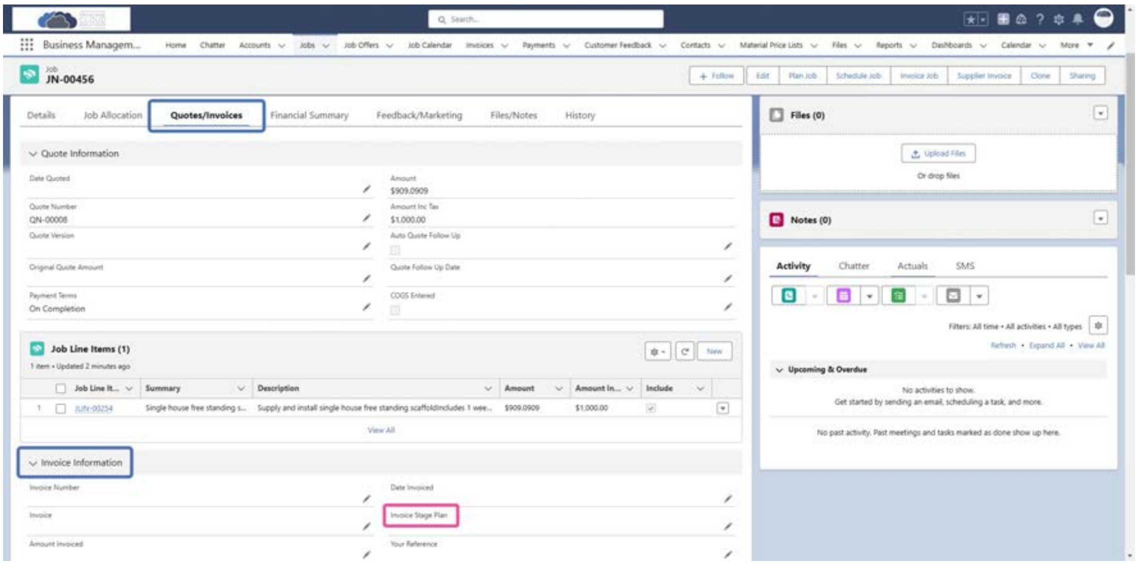
- Each stage is linked to a percentage of the total job cost
- When you complete a stage, you can create an invoice for that percentage
- Payments match your work milestones
- The process is straightforward and organized

There are three plans available:

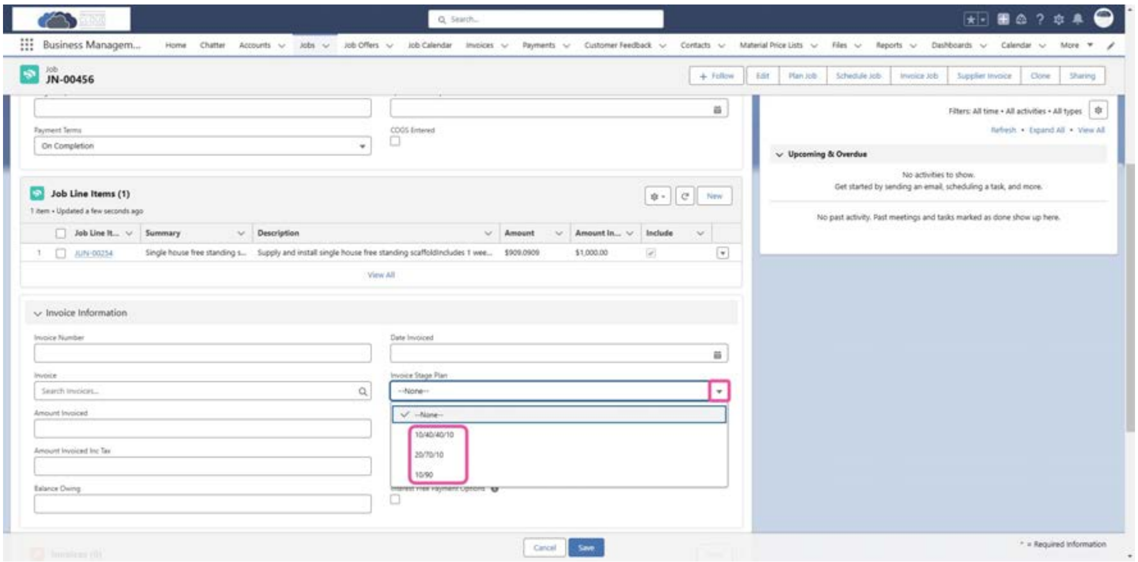
- 10/40/40/10
- 20/70/10
- 10/90

Choosing your invoice stage plan

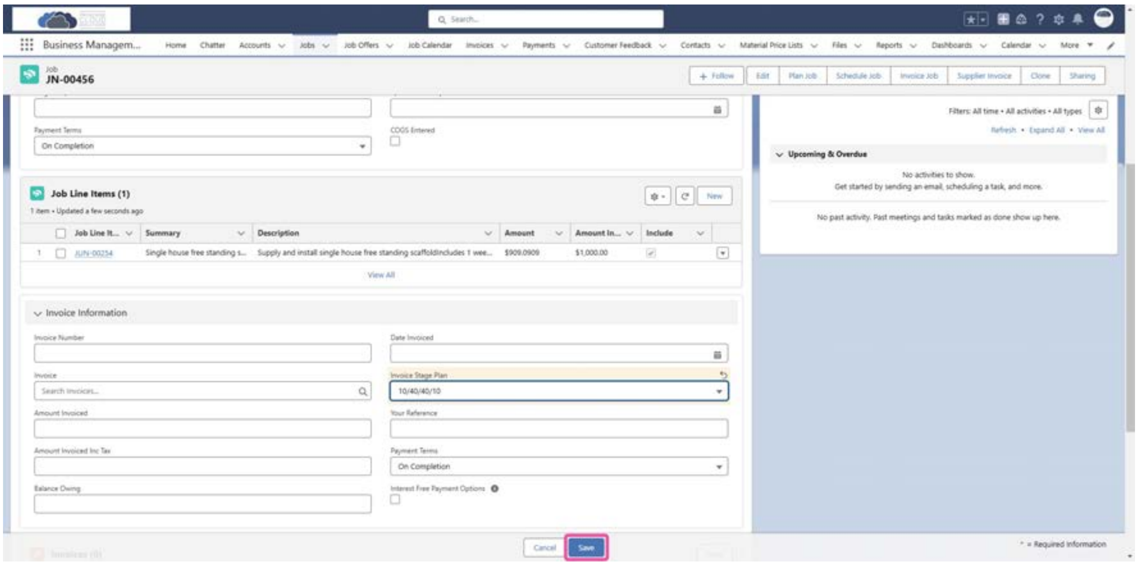
1. From the Job page, select the **Quotes/Invoices** tab and locate the **Invoice Stage Plan** field under Invoice Information.



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



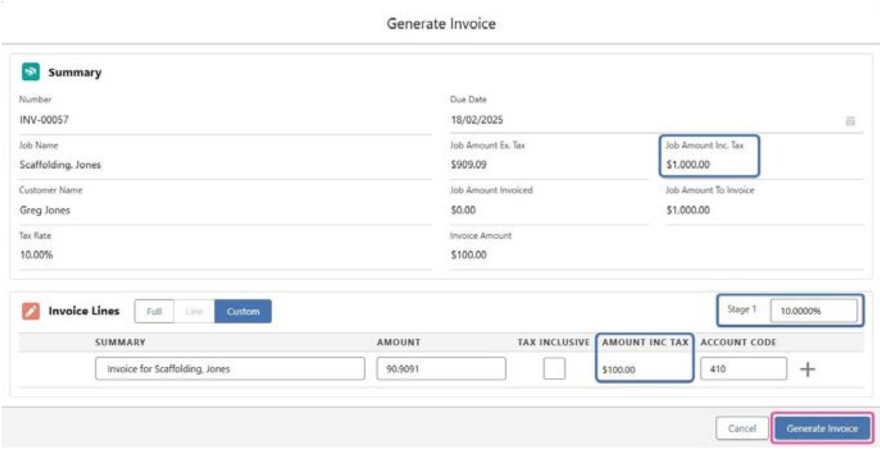
4. Click **Save**.



Invoicing in Stages

1. When you are ready, click **Invoice Job** on the Job page.

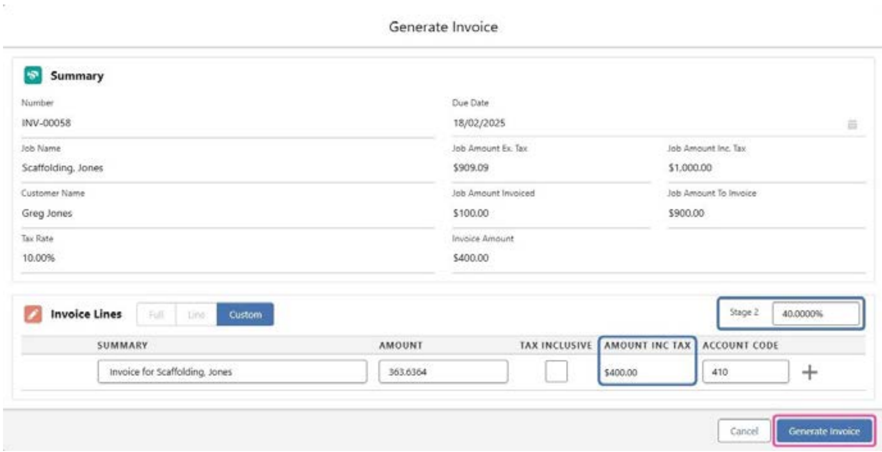
   The system defaults to 'Stage 1' and will show the first percentage from your stage plan. For example, using 10/40/40/10, the first stage is 10% of the job amount.



> At any time before issuing the first invoice, you could change your mind and generate a full invoice. *See* "How to generate a full invoice" on page ccxlix. Once you have generated the first invoice in a stage plan, you can continue invoicing using the stage plan or switch to using a custom invoice.

2. Click **Generate Invoice**.
3. Once you have made progress on the job and are ready for the next invoice, click **Invoice Job**.

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



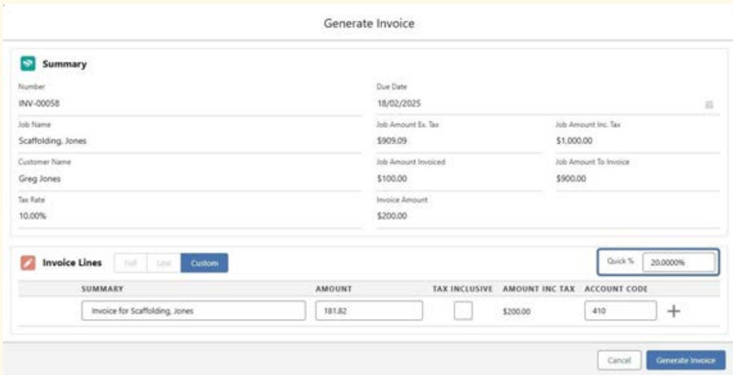
Full invoice is no longer available as there is already a custom invoice for the job.

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. .



Changes to the invoice amount

When Job Costs Change After Stage 1

If you need to increase the total job cost after sending the stage 1 invoice:

- The system will move to the next planned stage as usual
- The percentage on your next invoice will be higher than originally planned
- This higher percentage accounts for the price increase
- The system automatically adjusts to keep your cumulative invoiced amount in line with completed stages

> **Example using a 10/40/40/10 Stage Plan**
>
> You have an Invoice with a Job Amount of $1,000 with the 10/40/40/10 Invoice Stage Plan. You have already invoiced Stage 1 and Stage 2, which is 50% of the Job Amount or $500.
>
> You then increase the amount on the Invoice by $200. There is now $700 remaining to invoice.
>
> After Stage 3 you will have invoiced 90% of the job (10 + 40 + 40), so the system prepares an invoice with the percentage required to have 90% invoiced. In this case, Stage 3 will be 48.3333%.
>
> After Stage 3 is invoiced (90%), Stage 4 will be the default percentage (10%).

How to create and send customer invoices in bulk

Bulk invoicing lets you process multiple jobs from different customers all at once. How it works:

- Select jobs from multiple customer accounts
- Generate all invoices in a single operation
- Send all invoices simultaneously

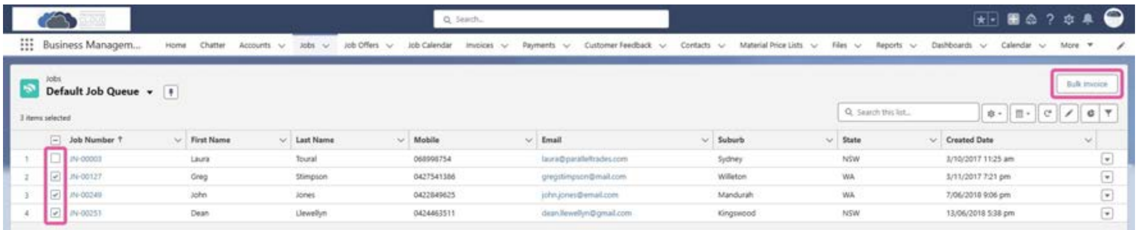
This feature saves time when you need to invoice many jobs at once.

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

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

To create and send customer invoices in bulk

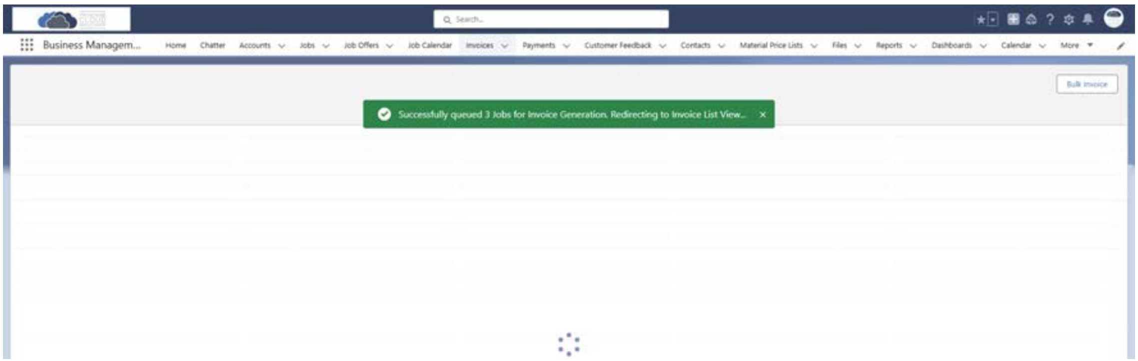
1. Starting from a Jobs list view, select the checkbox of the jobs you want to invoice, then select **Bulk Invoice**.



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

2. Confirm the number of Jobs you selected is correct and select **Yes, Generate Invoices**.

A success message will display: **Successfully queued x Jobs for Invoice Generation**.



You will now find the generated invoices in the selected jobs **Quotes/Invoices** tab. A copy of the email sent to the customer containing the Invoice is logged in the Activity panel of the Invoice record.

How to invoice based on an Account

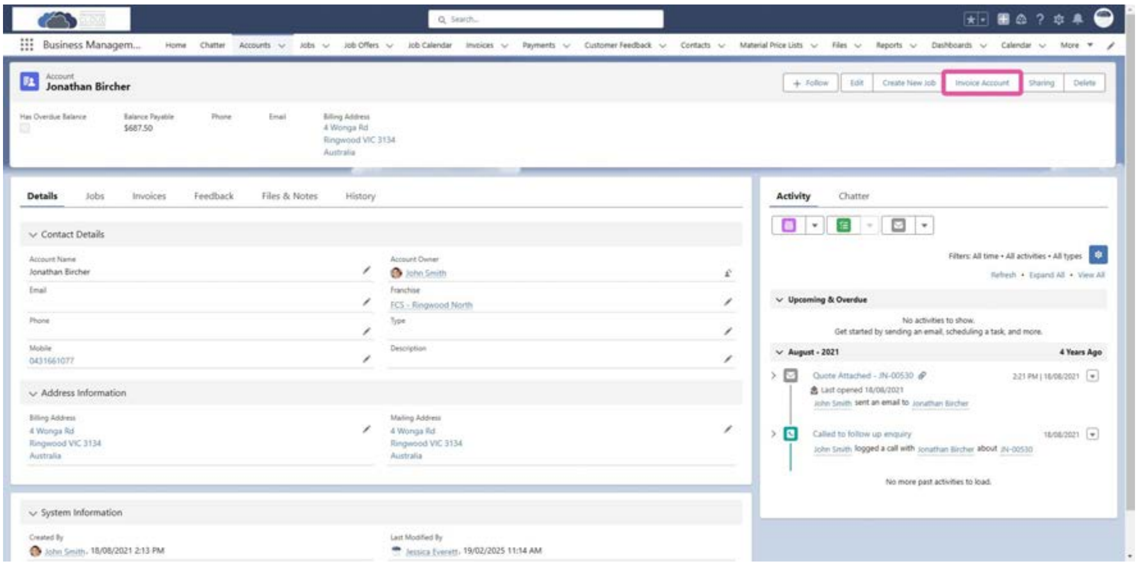
Account-based invoicing lets you invoice multiple jobs from one customer onto a single invoice. The benefits to this are:

- Fewer invoices to create and track
- Simpler and more regular billing process for you and your customers
- All related work appears on one document
- Easier for customers to manage payments

To invoice a job based on an Account, it must have a Status of **Invoice** with a Sub Status of **Pending**.

To invoice based on an Account

1. Begin from the page of the Account you wish to invoice and select **Invoice Account**.

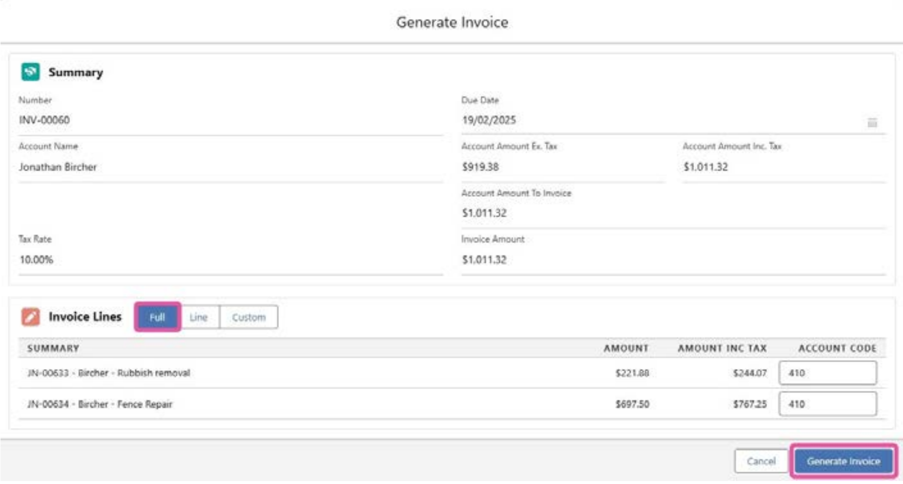


   The **Generate Invoice** dialog box appears.

2. Before you generate the invoice you can select:
   - Invoice all jobs with invoices pending from the account (Full)
   - Invoice select jobs (Line)
   - Enter an amount for a part payment or deposit (Custom)

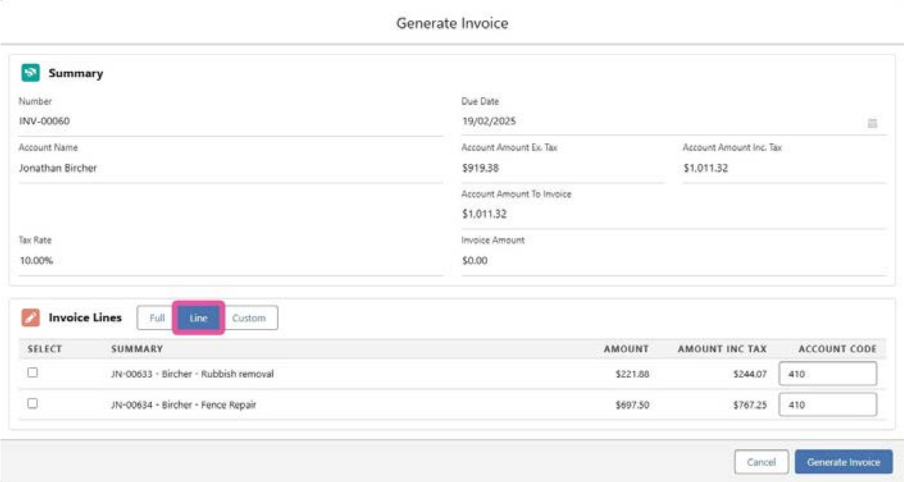
To invoice all pending jobs

Ensure the Invoice Lines option is **Full**, then select **Generate Invoice**.

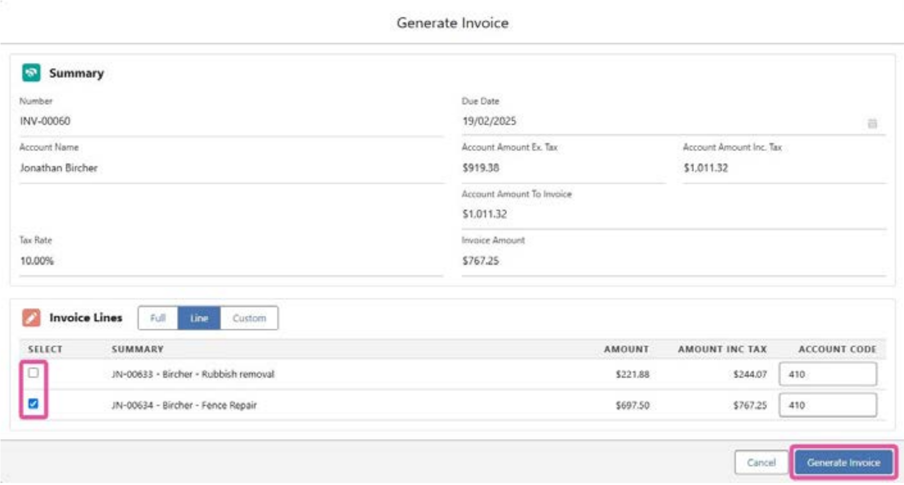


To invoice some of the pending jobs

Select **Line**.

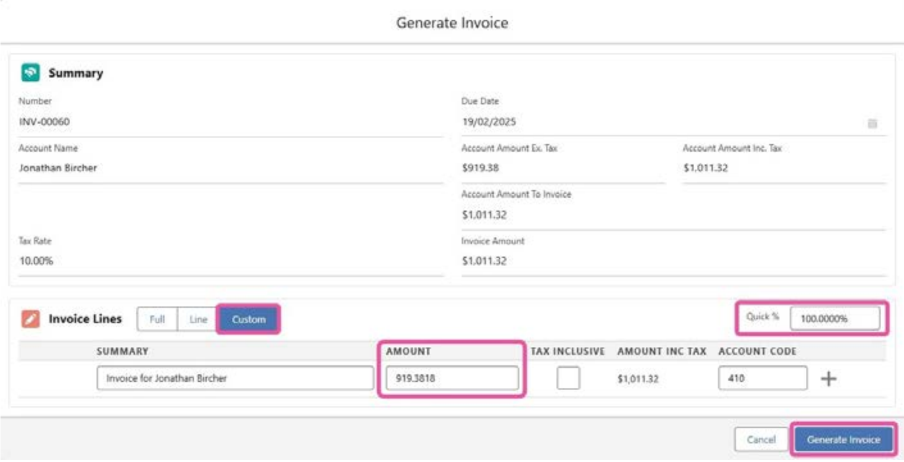


Now select the jobs to be invoiced, then select **Generate Invoice**.

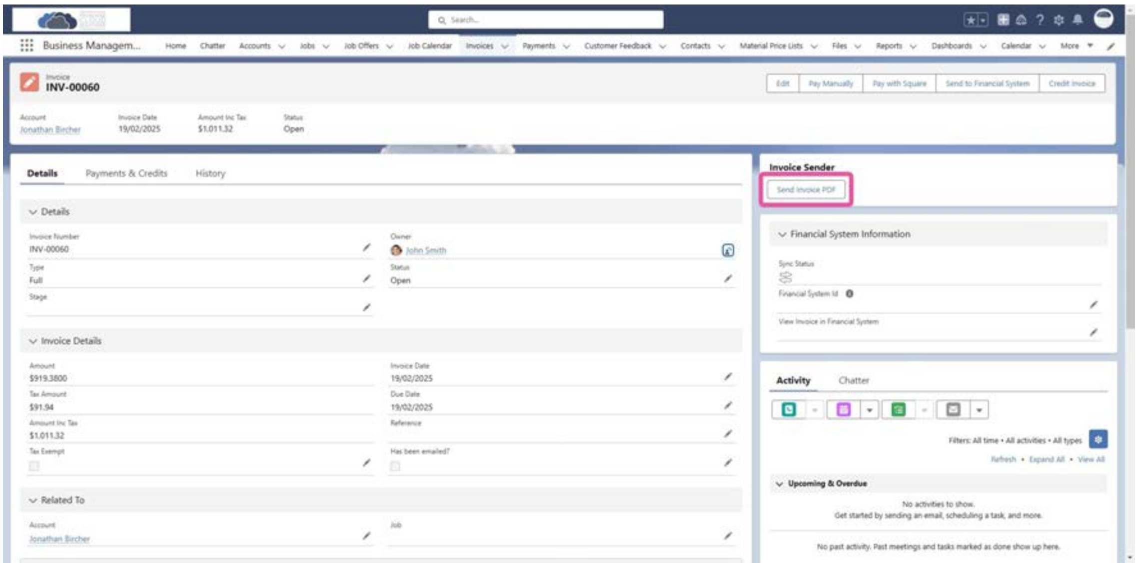


To enter a part payment or deposit amount

Select **Custom** and enter the value or percentage needed for this part payment, then select **Generate Invoice**.



3. A new invoice is now ready to send to your customer. To send it , select **Send Invoice PDF**.



   The **Compose Email** dialog box appears.

4. Use Compose Email to set the recipients, content, and attachments. When complete, select **Send**.

How to Include All Jobs on Your Invoice

Match Your Job Schedule to Your Invoice Schedule

The repeating job schedule must match or be less frequent than your invoice schedule. For example:

- If you invoice monthly, you can set up daily, weekly, or monthly repeating jobs
- If you invoice weekly, you can set up daily or weekly repeating jobs, but not monthly

What Happens If Schedules Don't Match

If your job repeats more often than you invoice, some jobs might not appear on the invoice.

> ✔ If you mow a lawn twice a month but invoice monthly, the job might only appear once.

Solution: Create Separate Named Jobs

To ensure all jobs appear on your invoice:

- Create multiple jobs with slightly different names

- Set each job to repeat at the invoice frequency

> **Example for fortnightly lawn mowing with monthly invoicing:**
>
> - Create "Mow front lawn (Week 1)" - repeats monthly
> - Create "Mow front lawn (Week 3)" - repeats monthly
>
> This way, both lawn mowing jobs will appear as separate line items on your monthly invoice.

> **Example for three weekly lawn mowing with monthly invoicing:**
>
> - Create "Mow front lawn (Seq 1)" - repeats three weekly
> - Create "Mow front lawn (Seq 2)" - repeats three weekly
>
> This way, when both sequences happen to fall in the same month, both lawn mowing jobs will appear as separate line items on the monthly invoice.

How to adjust the value of an invoice

You may want to adjust the value or update the details of a generated invoice.

> You may have allowed for certain materials within your Job Plan and generated an invoice for the job on that basis. But if you used more materials, you may choose to adjust the invoice.

There are multiple ways of achieving this, depending on the type of **Job** or the status of the **Invoice**. Here are the options.

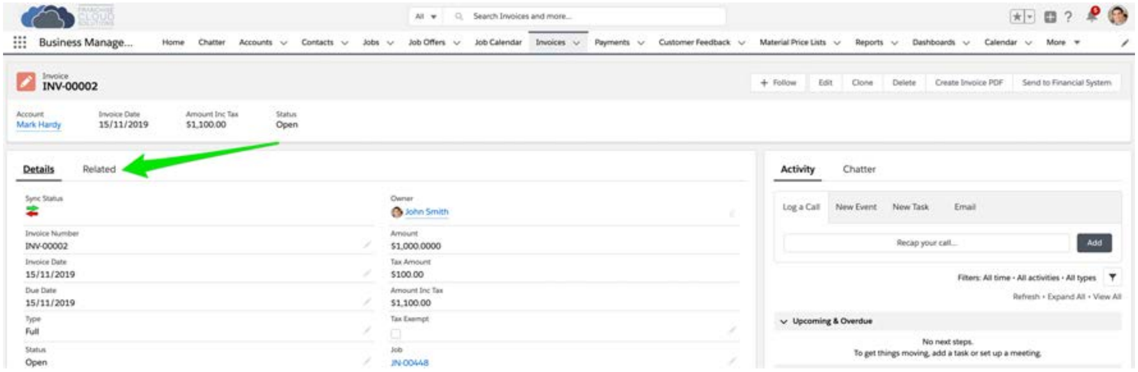
Job	Invoice	Procedure
Standard Job	Invoice not yet sent	"How to overwrite an invoice" below
Standard or Repeating Job	Invoice is sent but has no payments	"How to void an issued invoice" on page cclxviii
Standard or Repeating Job	Invoice has at least one payment	"Issuing & allocating credit notes" on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

How to overwrite an invoice

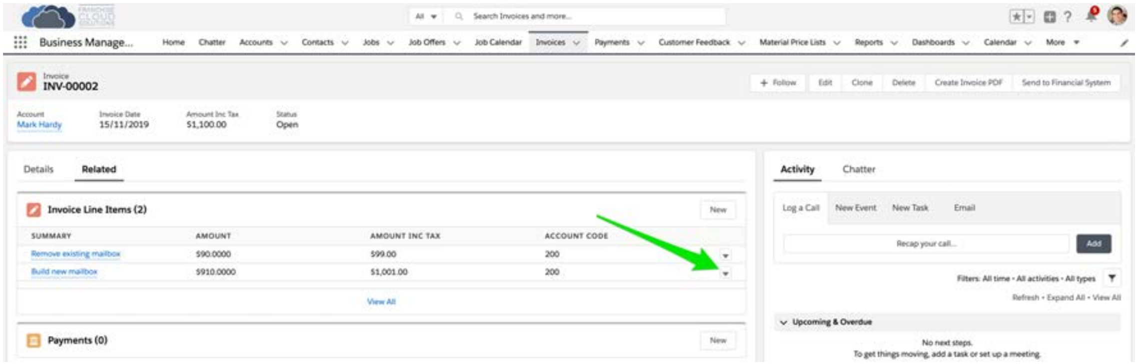
For jobs that are not marked as repeating, you can overwrite an invoice if it is not yet sent to the customer.

To overwrite an invoice

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

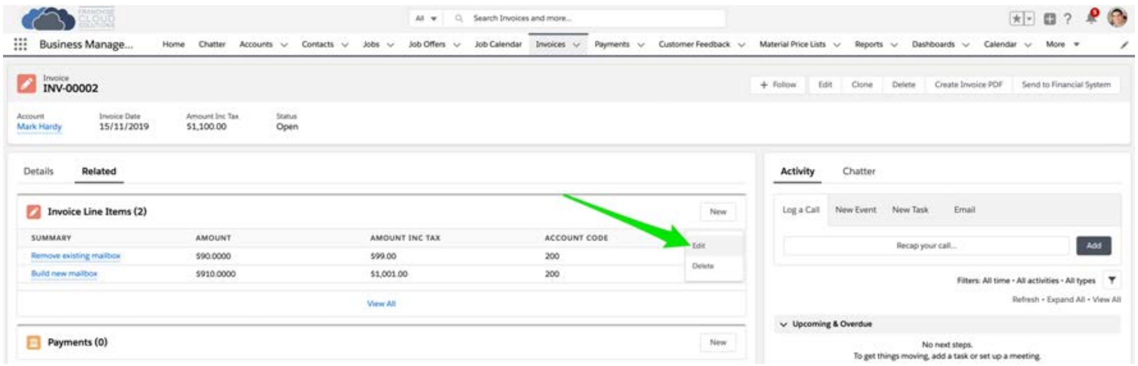


2. From the **Related** tab, located the **Invoice Line Items** section, and select the **more actions** drop-down.

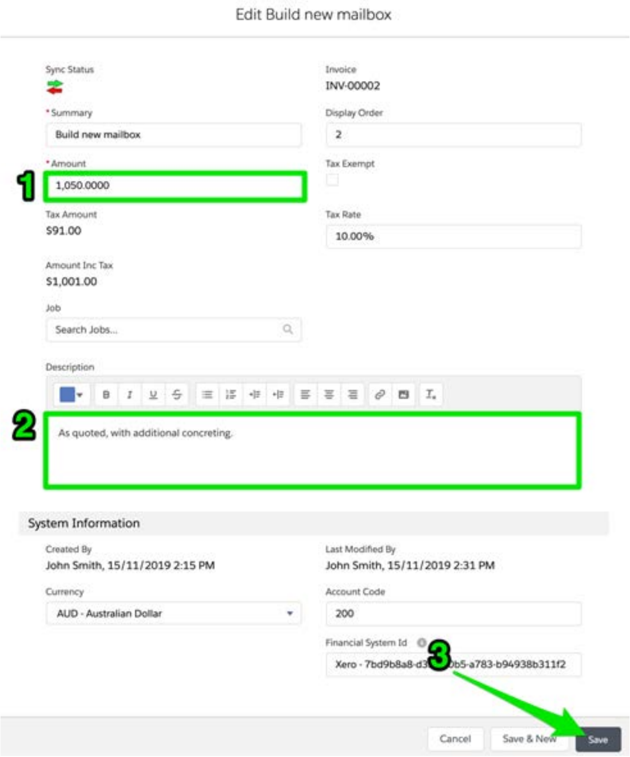


> Alternatively, you may want to add a new Line item. You can do this by choosing **View All** and then **New** .

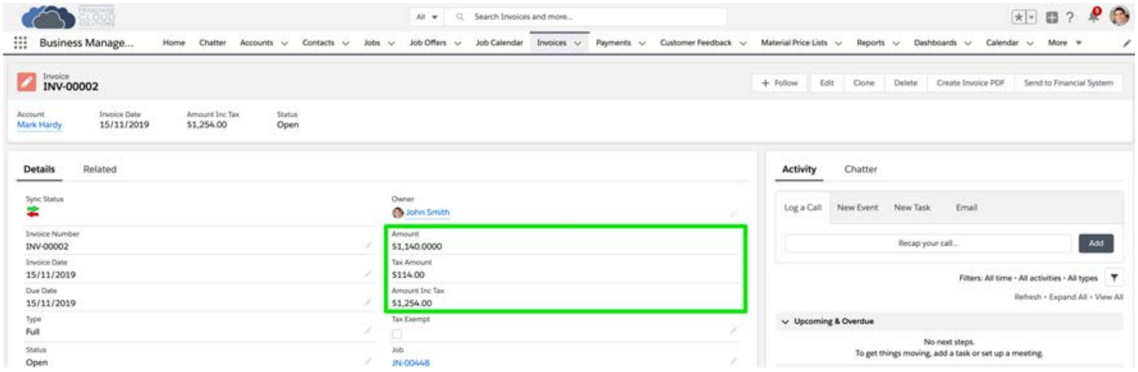
3. Then choose to **Edit** the Line Item.



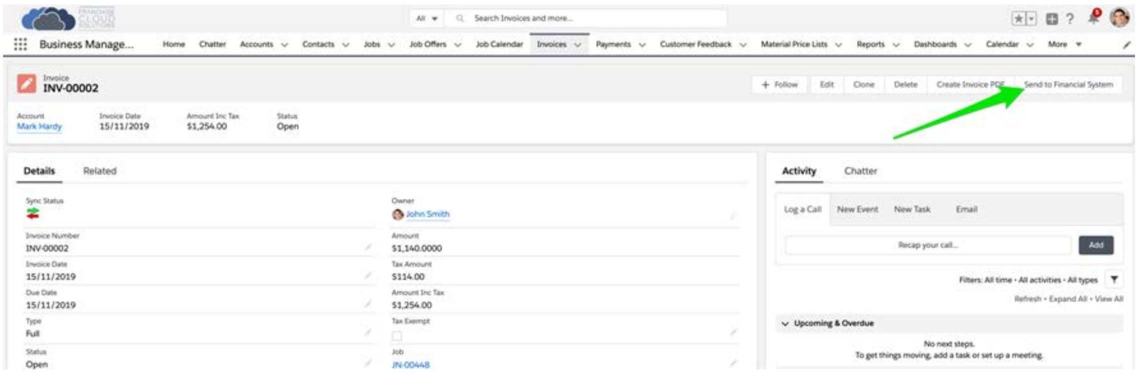
4. The line item dialog box appears. Adjust the value and insert a comment to explain the change in the `Description` field., then press **Save**.



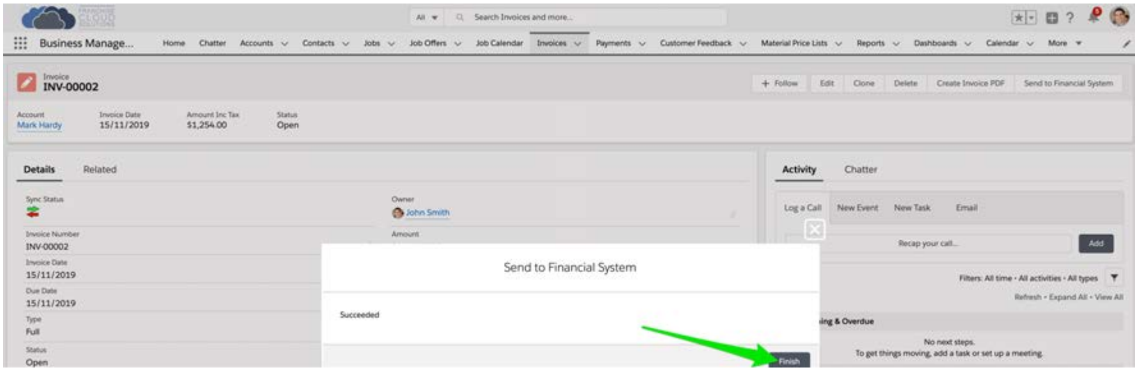
5. Having modified the invoice line item, note the change reflected on the Invoice header.

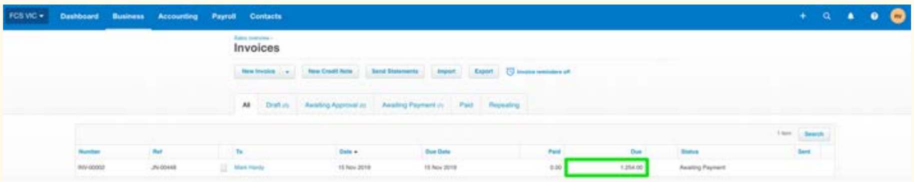


6. Now ensure the change is updated into Xero by pressing **Send to Financial System**.



7. When the sync is complete, the system shows a success message.



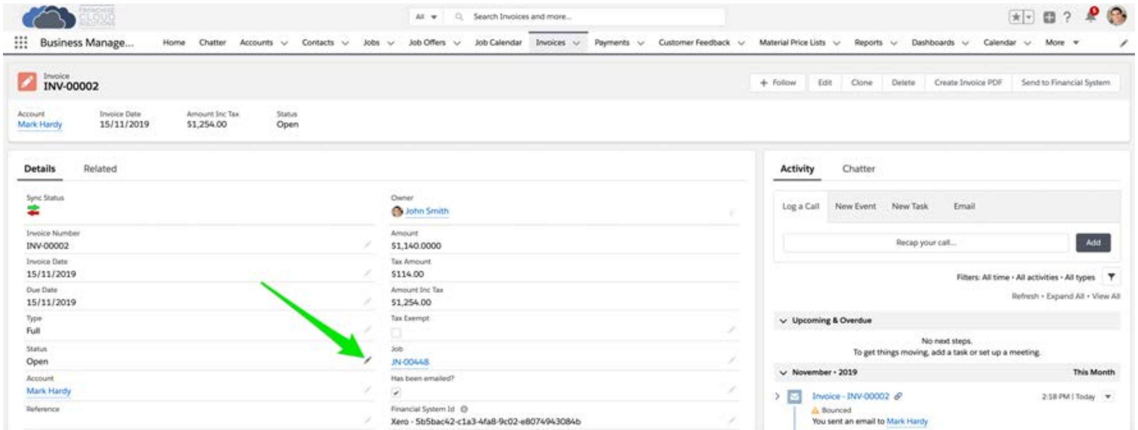
> The change is replicated to the external financial system.
>
> 

How to void an issued invoice

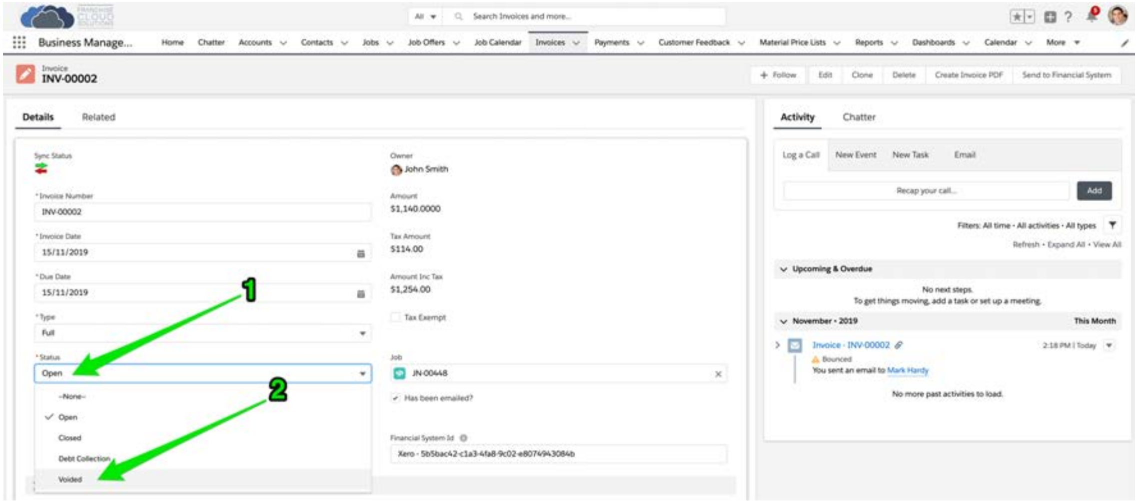
When you have issued an invoice and need to alter it, you can void the invoice and then re-generate it.

To void an invoice

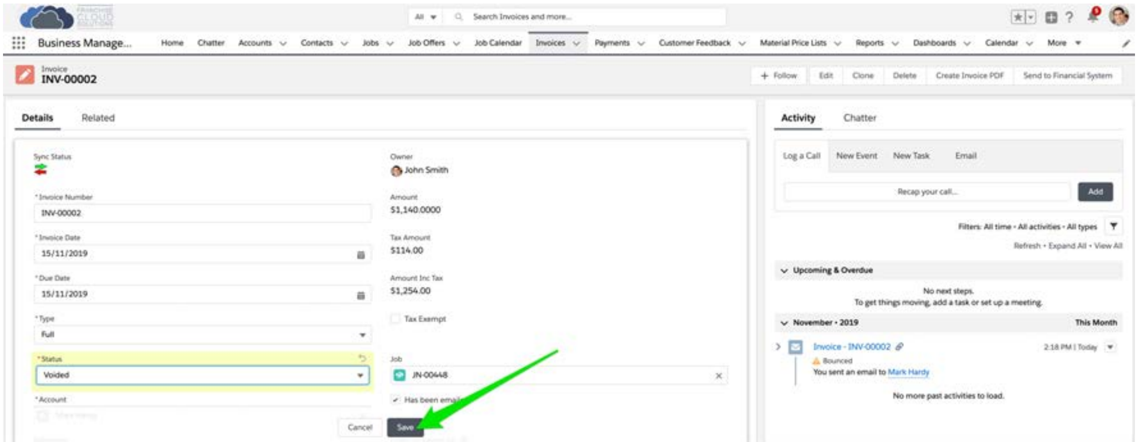
1. From the **Invoice**, switch the `Status` field into edit mode.



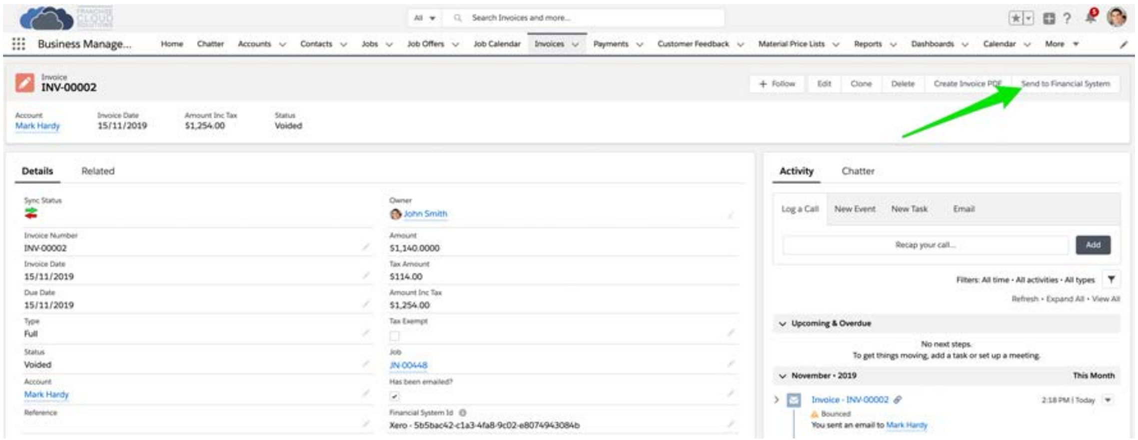
2. Open the `Status` drop-down, and select *`Voided`*.



3. Now press **Save**.



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



The effect of syncing a voided invoice to Xero will differ depending on how the mapping is configured.

- When you have the mapping set to `AUTHORISED`, voiding an invoice in Salesforce will cause the invoice to be voided in Xero.
- When you have the mapping set to `DRAFT`, voiding an invoice in Salesforce will cause the invoice to be deleted from Xero.

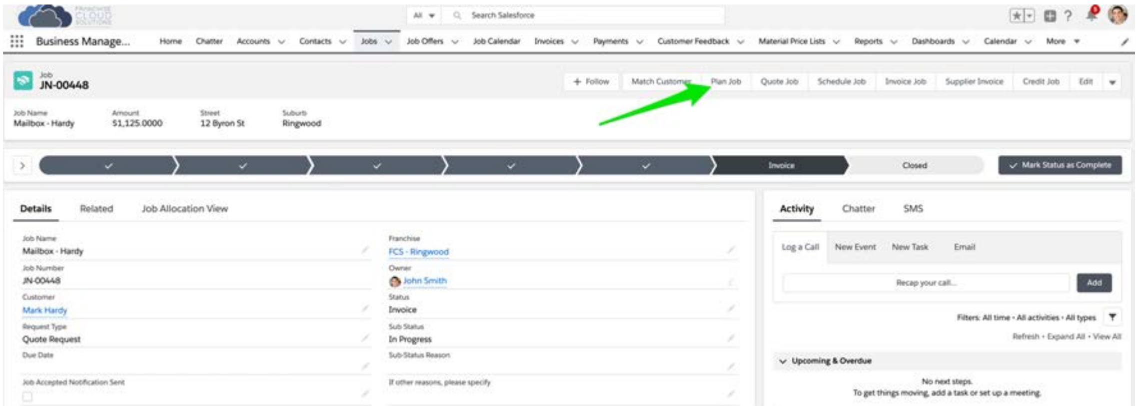
After voiding an invoice, you will most likely want to generate a new invoice. *See* "How to re-invoice after voiding an invoice" below

How to re-invoice after voiding an invoice

When you have voided an invoice against a job, you will most likely want to regenerate the invoice.

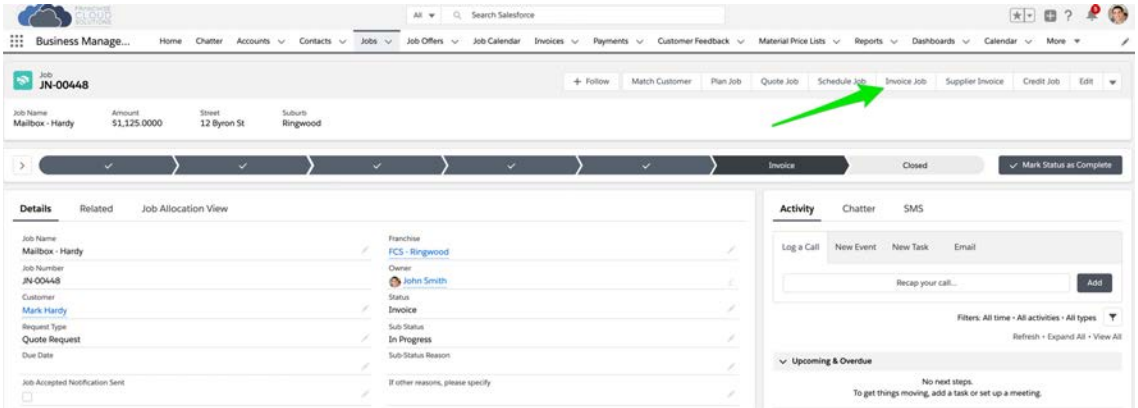
To regenerate an invoice

1. From the **Job**, make any necessary changes to **Plan Job**.

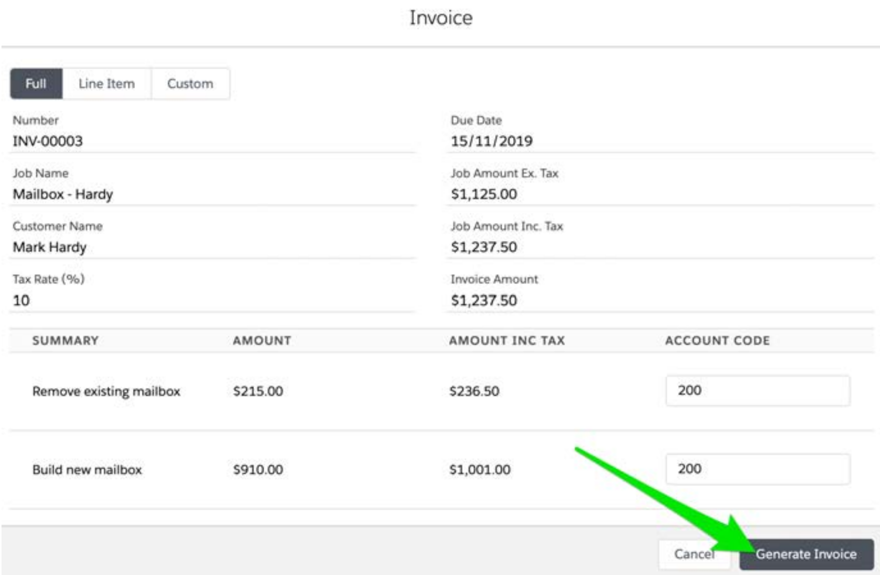


To understand how to make changes to the job plan, *See* "Job planning and estimation" on page cxxv.

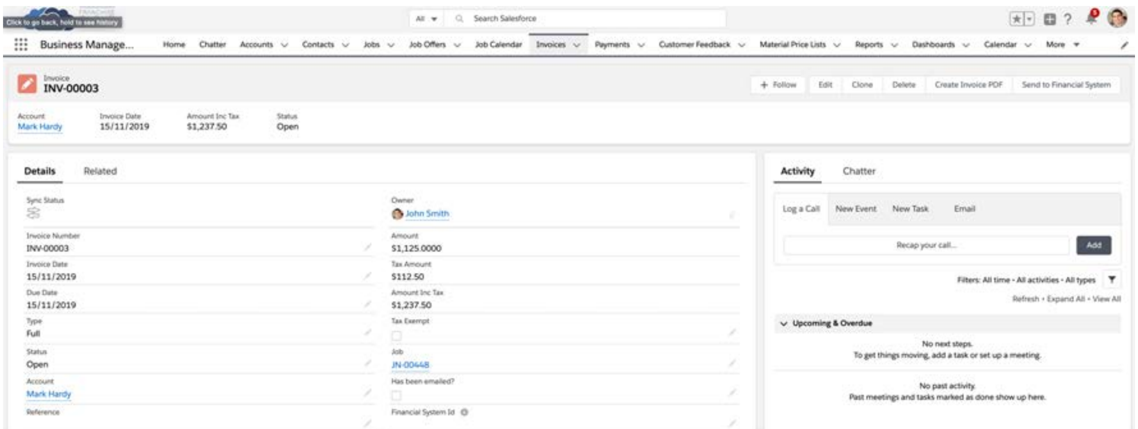
2. Once you're ready to generate the Invoice, press **Invoice Job**.



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



4. The newly generated invoice displays.



Recording payments against an invoice

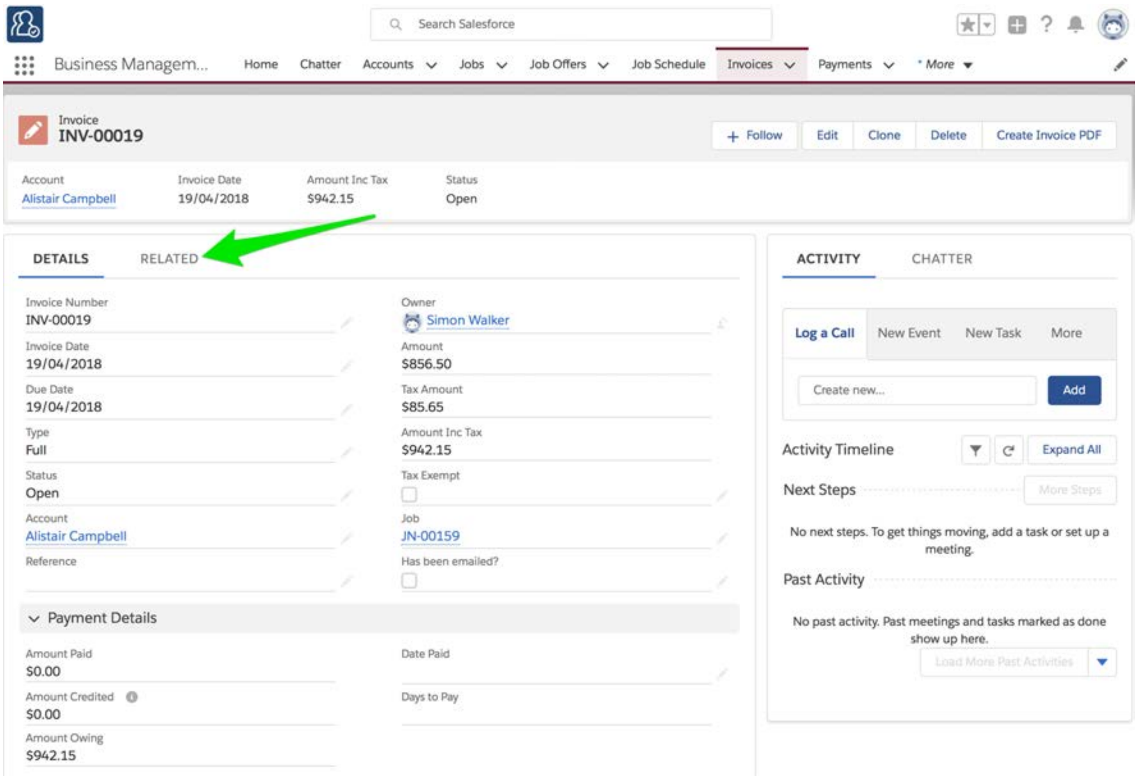
How to record a payment

It is preferable to record your payments in Xero if you are using financial integration. Any payments recorded in Xero will be pulled back to Salesforce (generally within 15 minutes). You can immediately retrieve changes to payment by manually choosing the **Pull from Financial System** button.

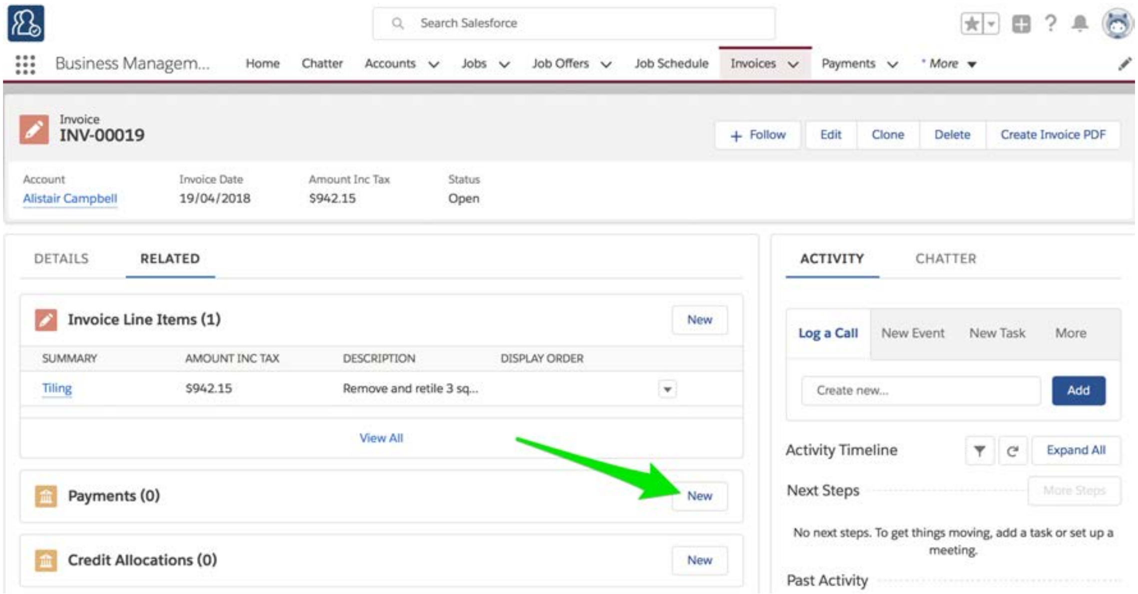
If you are not using financial integration with Xero, you can record payments within FranchiseOps. You record payments against an invoice. You first locate the invoice generated for a particular job, then you record the payment against the invoice.

To record a payment against an invoice using FranchiseOps

1. From the **Invoice**, select the **Related** tab.

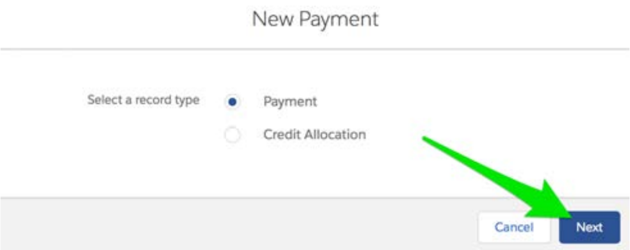


2. From the **Payments** section, press **New**.



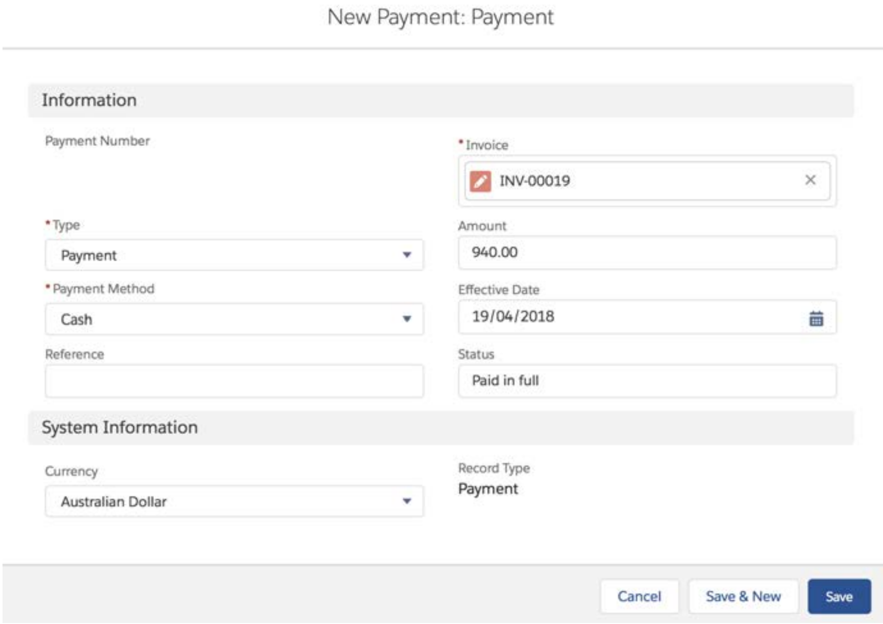
The **New Payment** dialog box appears.

3. Press **Next**.

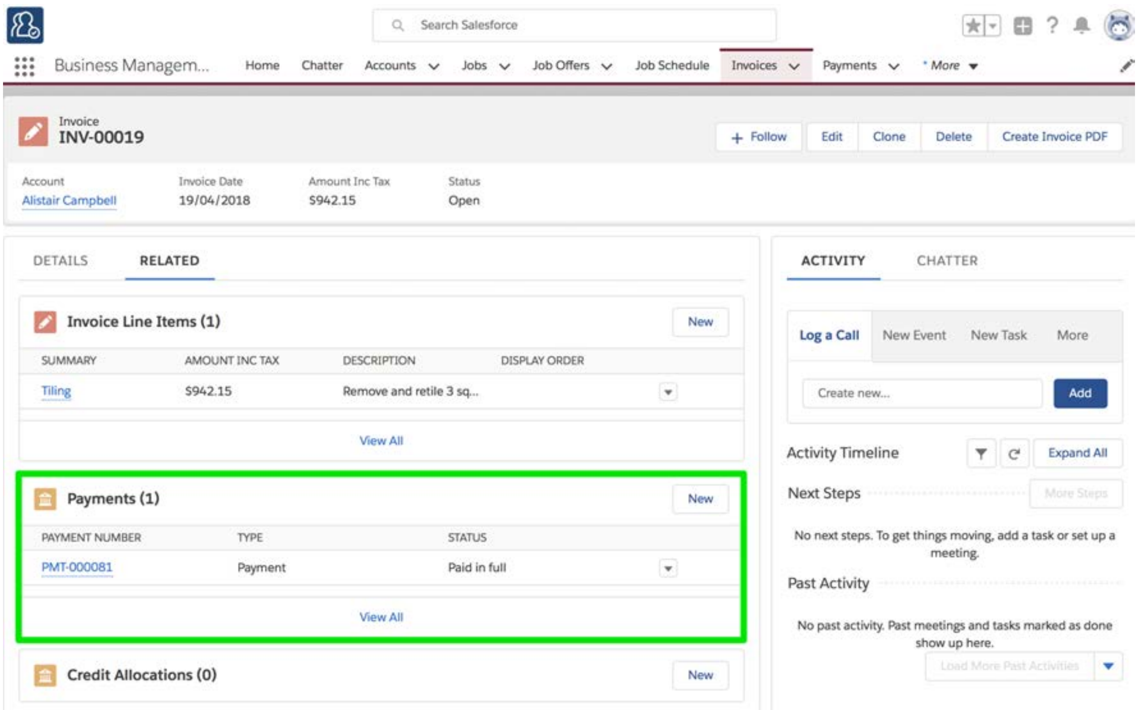


The **New Payment** dialog box appears with `Invoice` automatically selected.

4. Complete the payment information, then press **Save**.



5. The New Payment dialog box is saved and the payment appears on the Invoice.



How to allocate a payment to multiple invoices

Xero provides direct support for allocating a single payment to multiple invoices. If you are using financial integration with Xero, do the payment allocation in Xero.

For those who are using FranchiseOps only, you can create multiple payments, each with a common reference number.

You may find it useful for the reference number to be the bank transaction number.

How to write off a bad debt

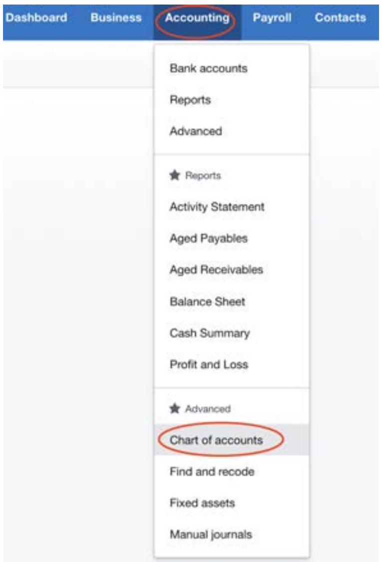
Sometimes we are unable to collect income from an invoice we generated, resulting in a bad debt. Here’s how to write off a bad debt if you’re using Xero.

What you need

To implement this solution, your chart-of-accounts is going to need a Bad Debt expense account. You then need to ensure it allows payments (described below).

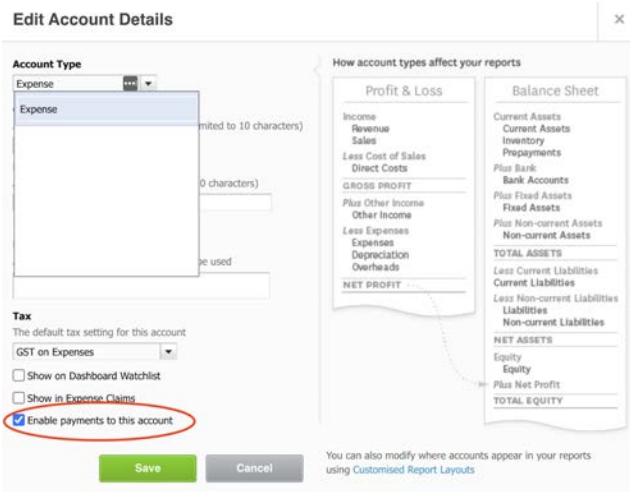
To ensure the Bad Debt account can accept payments

1. In Xero, go to **Accounting** > **Chart of Accounts**.



2. Scroll down to the Bad Debt account and select it.

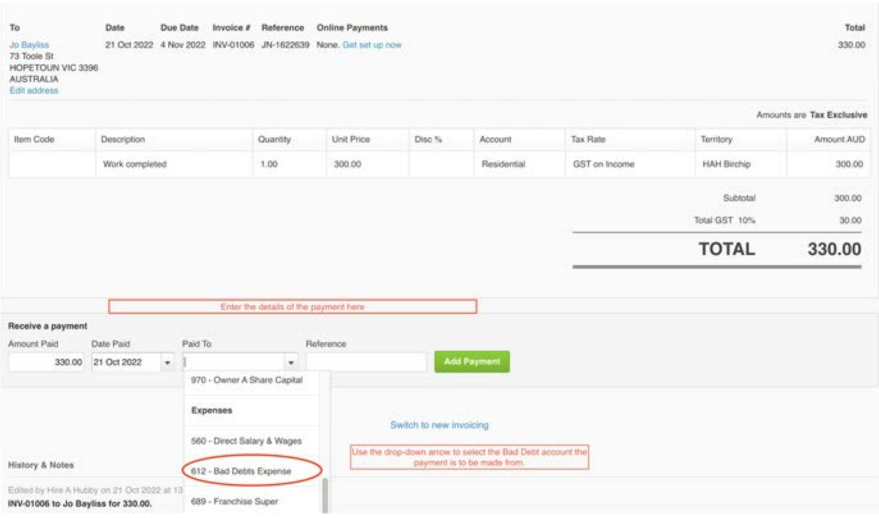
3. Ensure **Enable payments to this account** is checked. If it isn't, check it and then press **Save**.



Now that you've set up your Bad Debt account, you're ready to write off your invoice.

To write off your invoice as a bad debt

1. Locate the invoice, open it and find the **Receive a payment** section.
2. In the `Amount Paid` field, enter the amount of money you want to write off (inc. GST). Within `Date Paid`, record the current date. In the `Paid To` drop down, select the *`Bad Debt`* account.



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

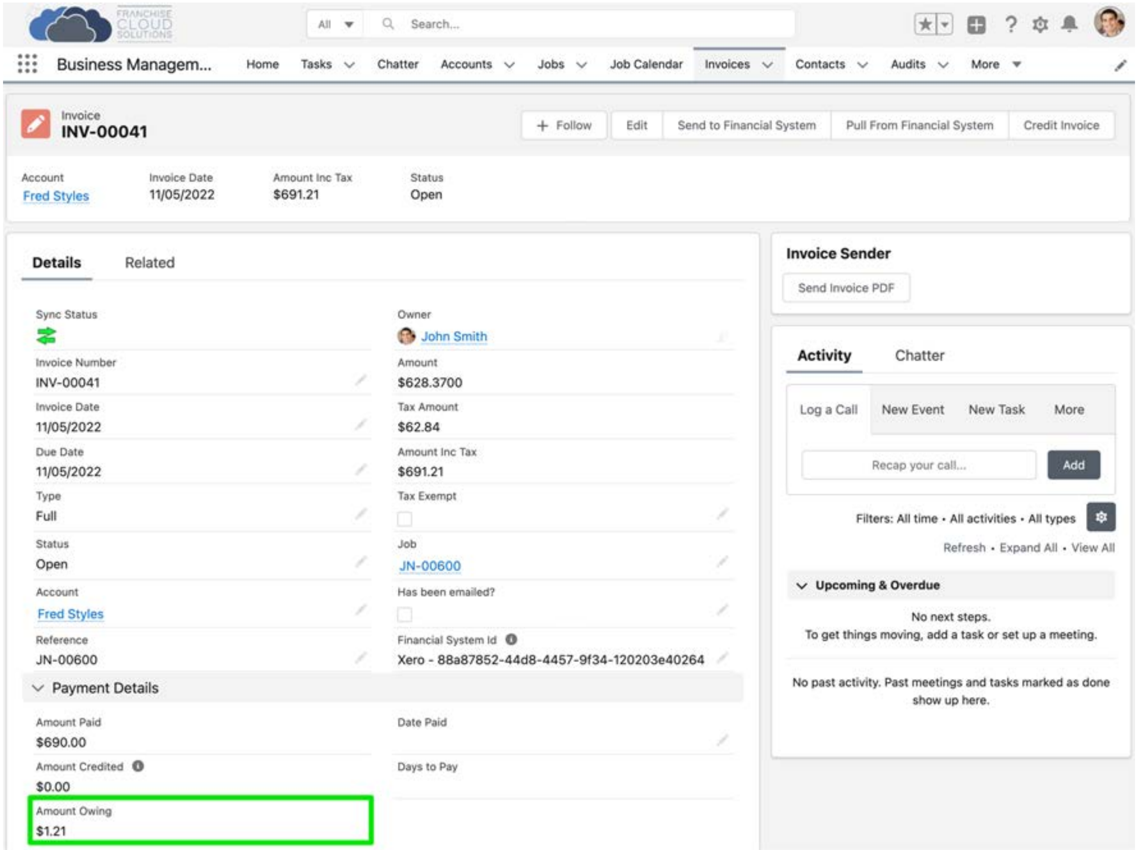
Sometimes you need to discount an issued invoice. There are a variety of reasons you may choose to do this:

- 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.

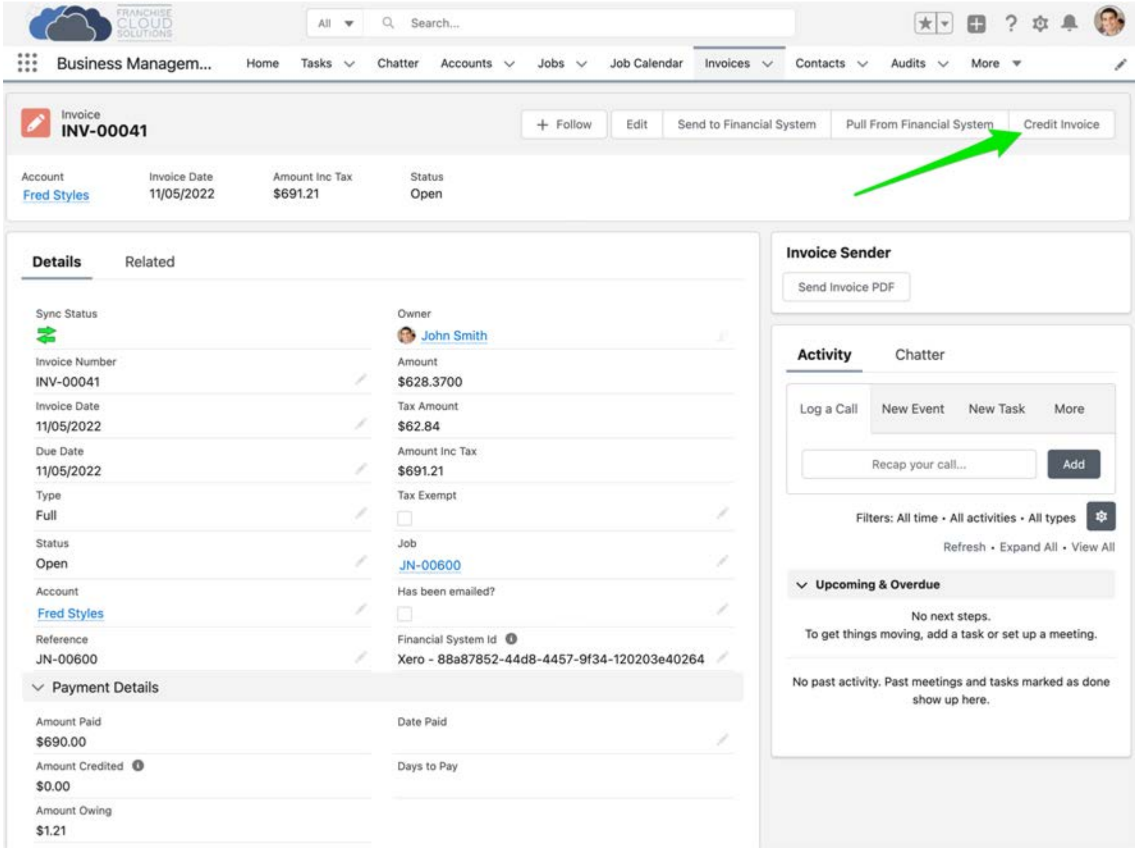
> In the example below, we are providing a “rounding discount.” A rounding discount is paid when the invoice is generated in dollars and cents and the customer pays in whole dollars.

To provide a discount on an invoice

1. From the **Invoice**, note the value of `Amount Owing`.

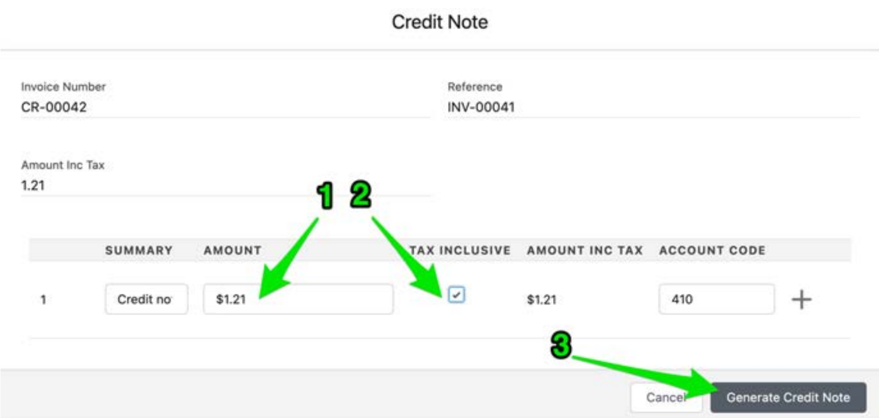


2. Press **Credit Invoice**.



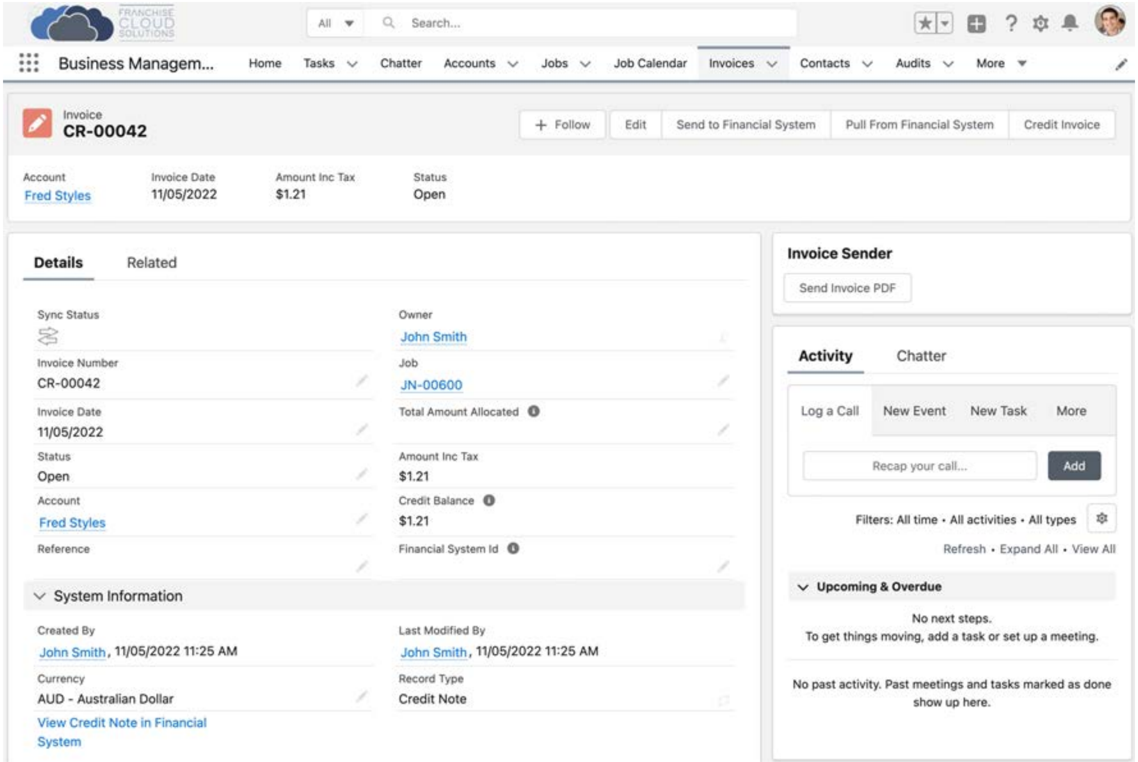
The **Credit Note** dialog box opens.

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



4. Press **Generate Credit Note**.

   The **Credit Note** invoice displays.



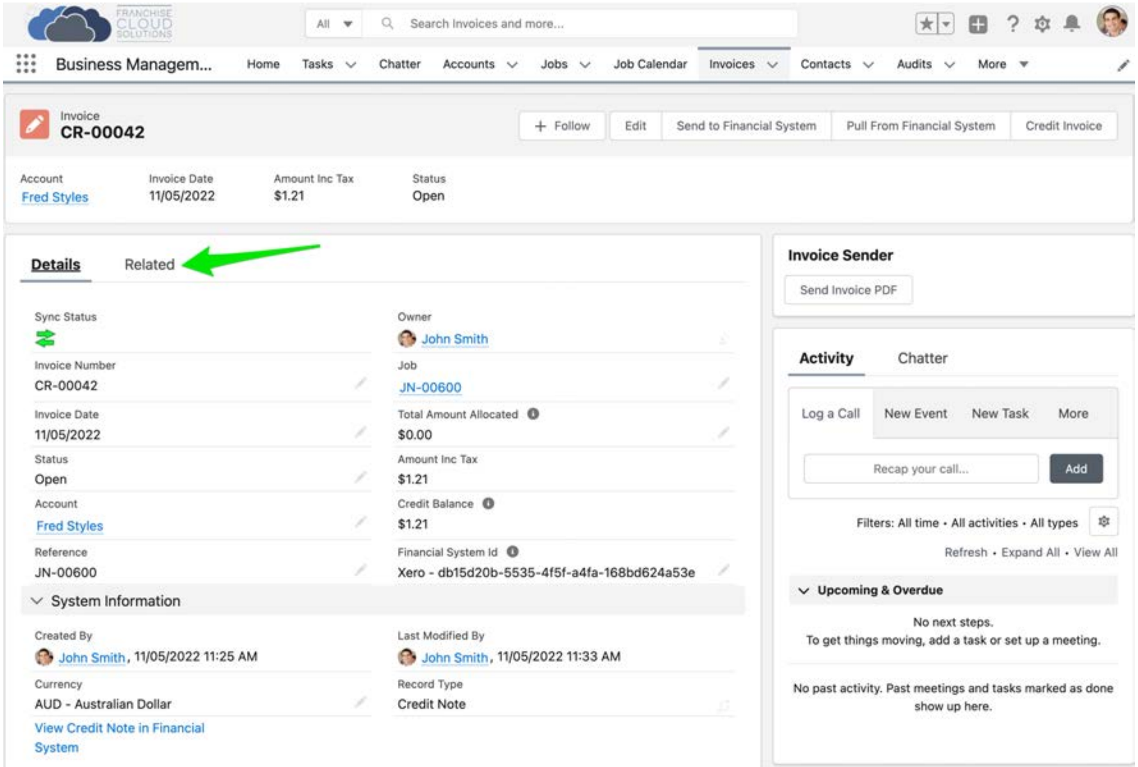
> Now you need to allocate the Credit Note to the invoice. *See* “How to allocate credit to an invoice” below.

How to allocate credit to an invoice

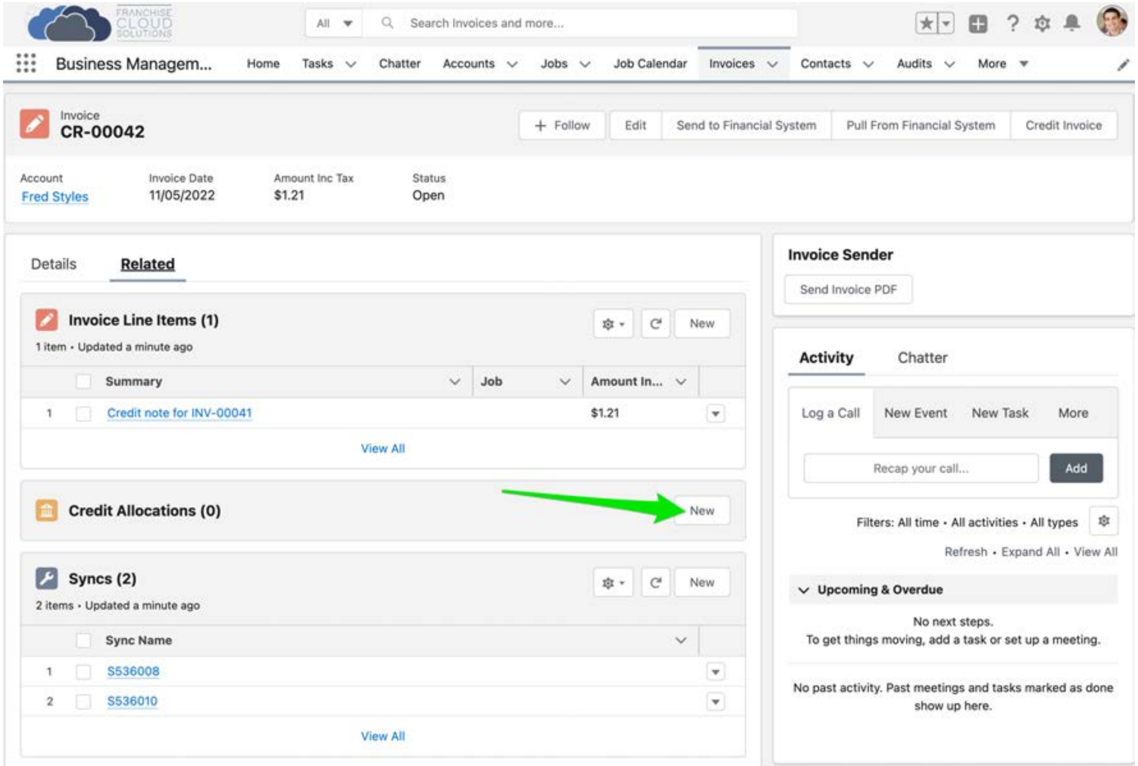
When you issue a credit note, you generally need to allocate it to an invoice.

To allocate a credit note to an invoice

1. From the **Credit Note**, press the **Related** tab.

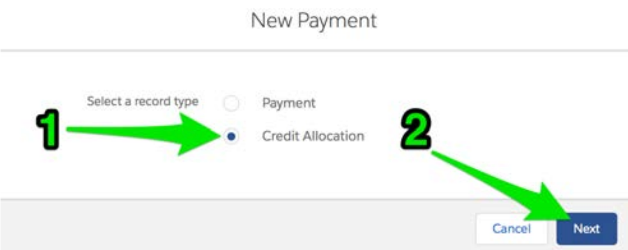


2. From the **Credit Allocations** section, press **New**.



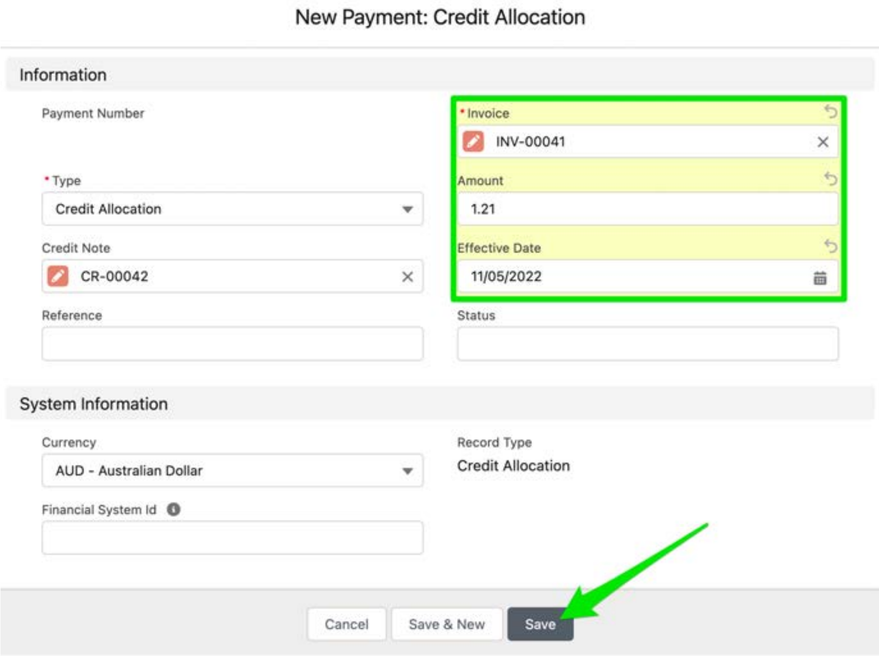
The New Payment dialog box opens.

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



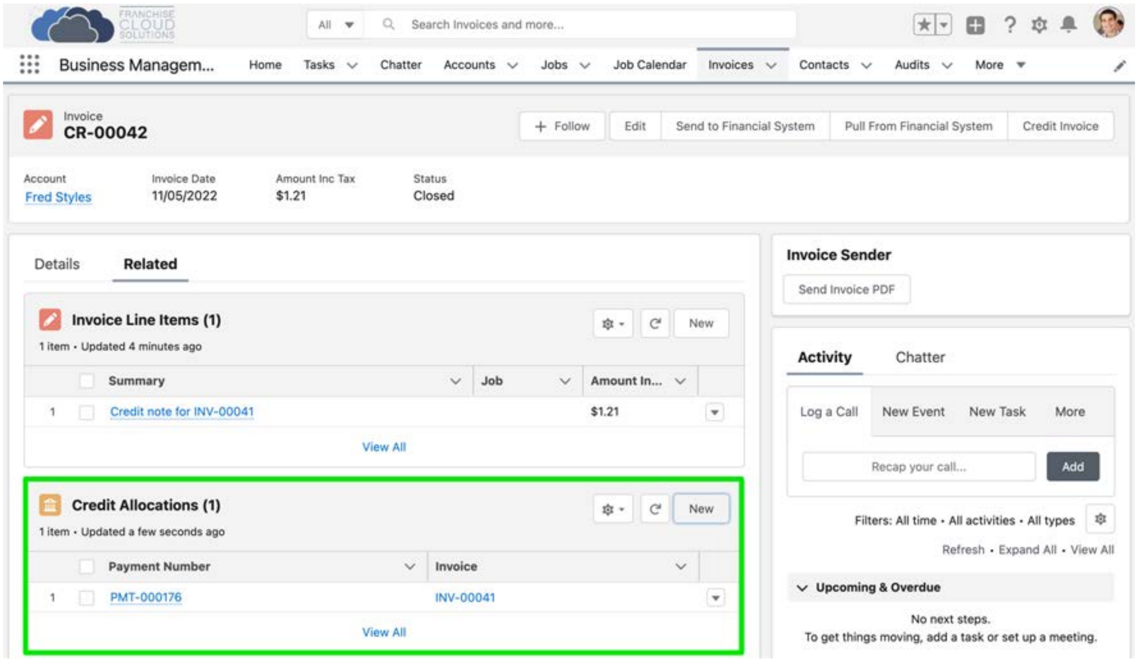
The **New Payment: Credit Allocation** dialog box opens.

4. Select the `Invoice`, enter the `Amount` and `Effective Date` and then press **Save**.

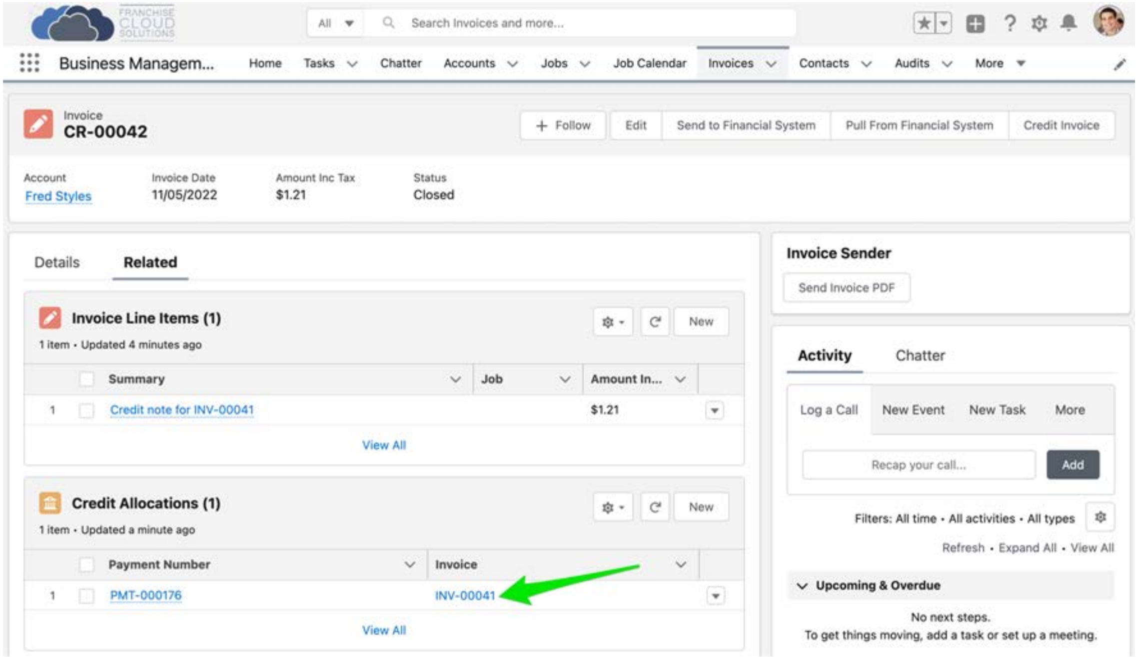


> Depending on the underlying payment method, you may find it useful to include a transaction number in the `Reference` field or to assign a `Status`.

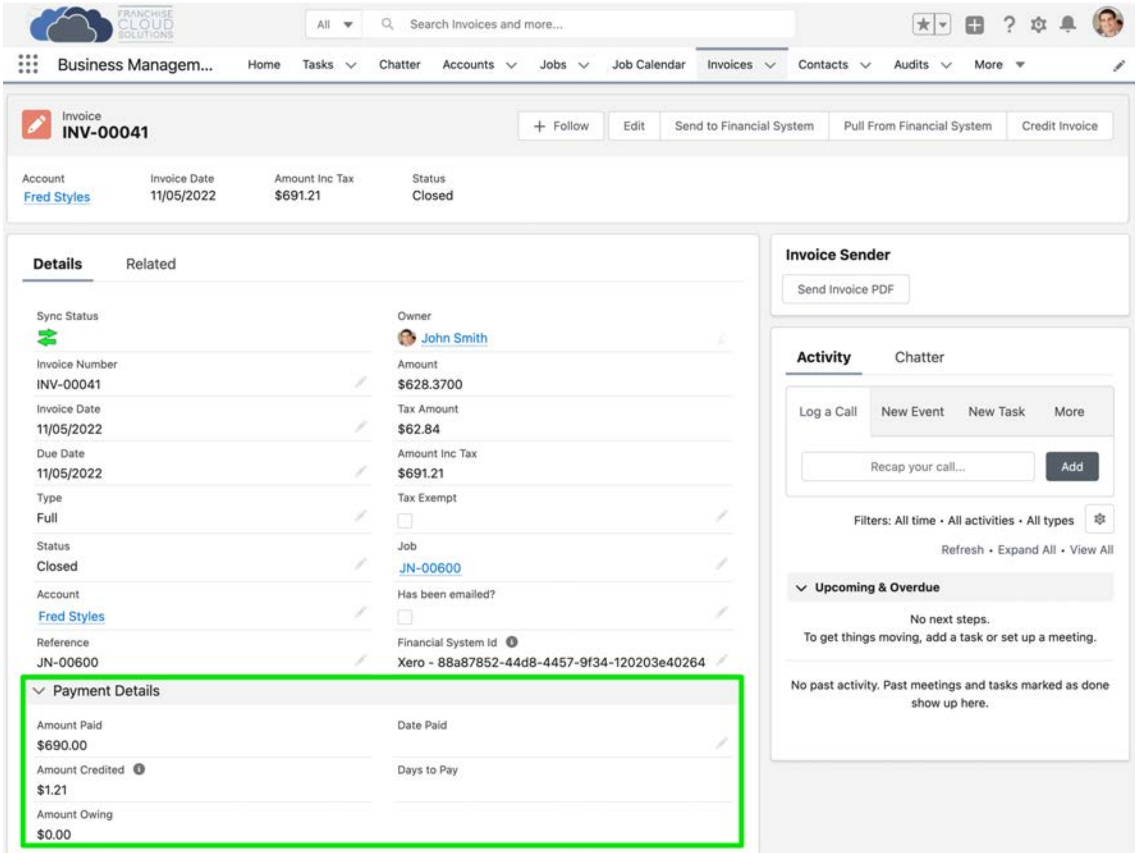
5. The credit invoice is now allocated as a payment against the customer invoice.



6. You can check that this is correct by selecting the `Invoice`.



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



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

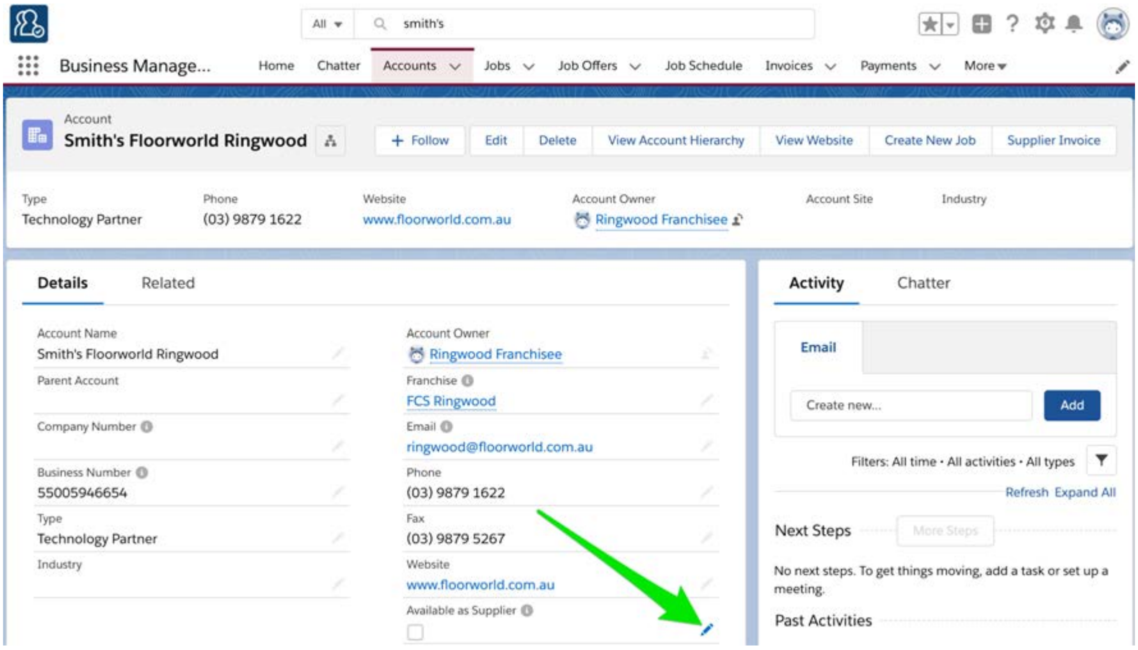
Working with Suppliers & Supplier Invoices

Adding a supplier

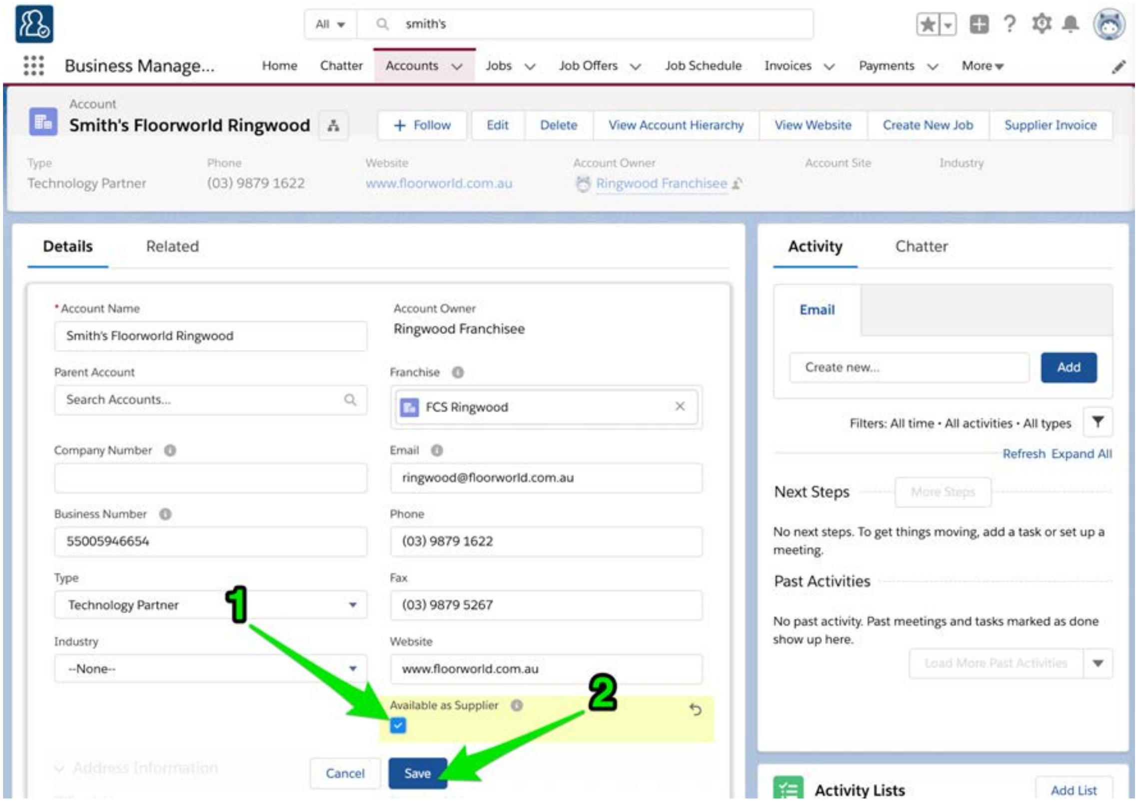
Business Management represent suppliers as a special type of Business Account.

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.



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



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

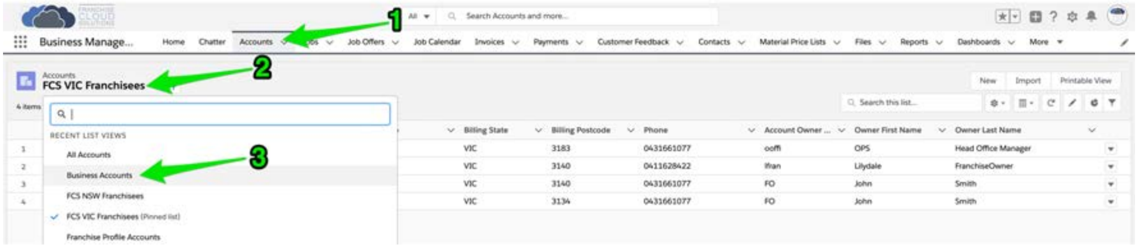
Creating a supplier invoice

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.

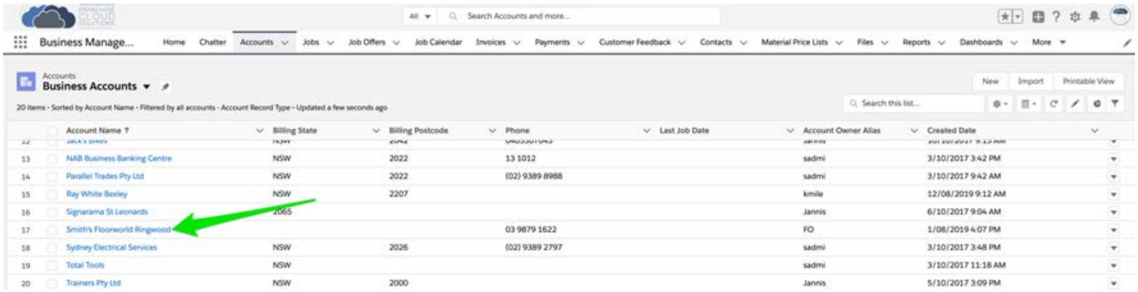
> You can also record purchases not intended for a job (i.e. purchases for stock). To do this, ensure the Job on the invoice line is blank.

To record a supplier invoice

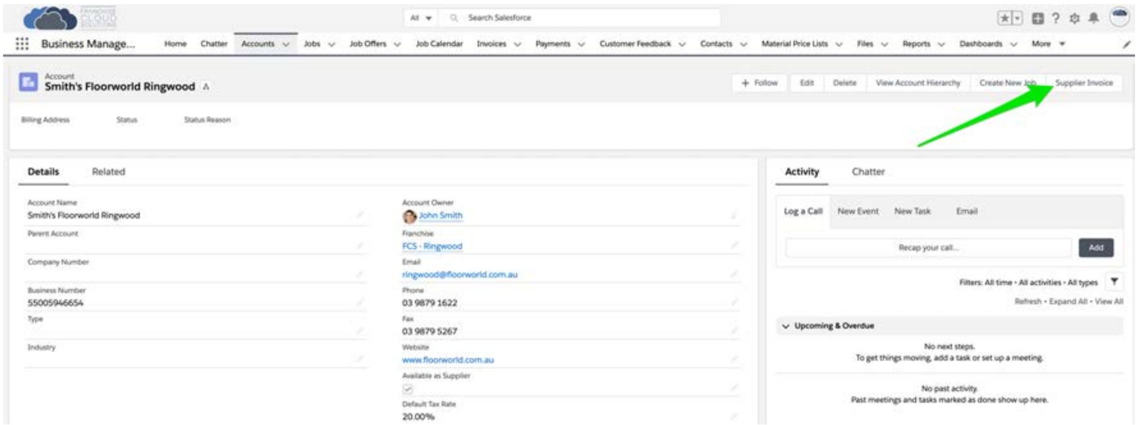
1. From the Salesforce **Accounts** list, select the **Business Accounts** list view.



2. Select the target supplier account.

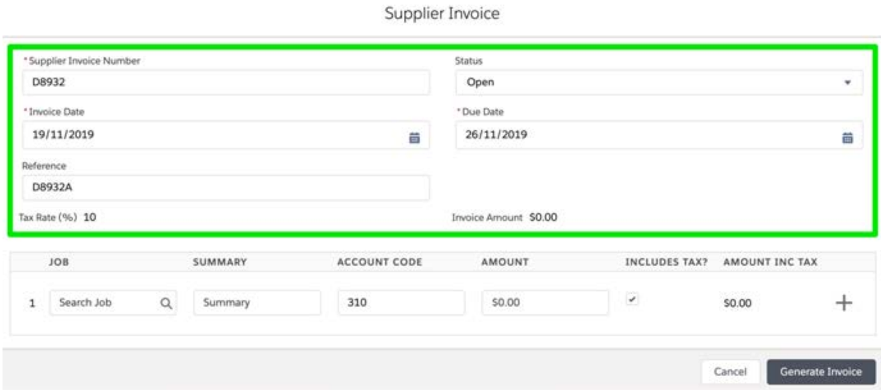


3. From the **Account** page, press **Supplier Invoice**.

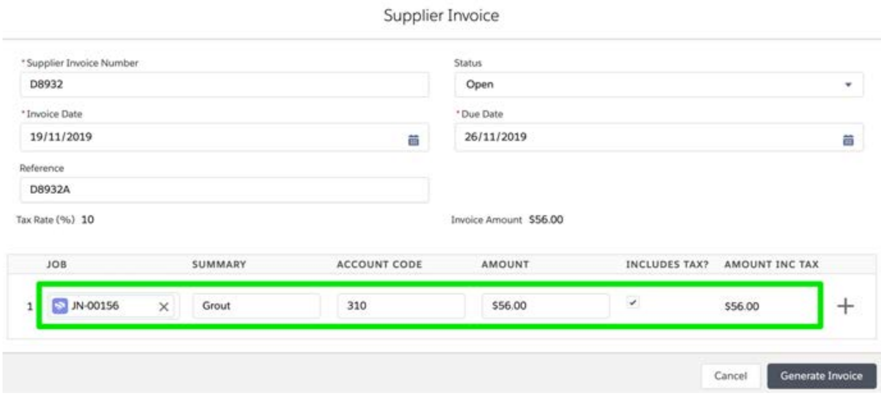


The **Supplier Invoice** dialog box appears.

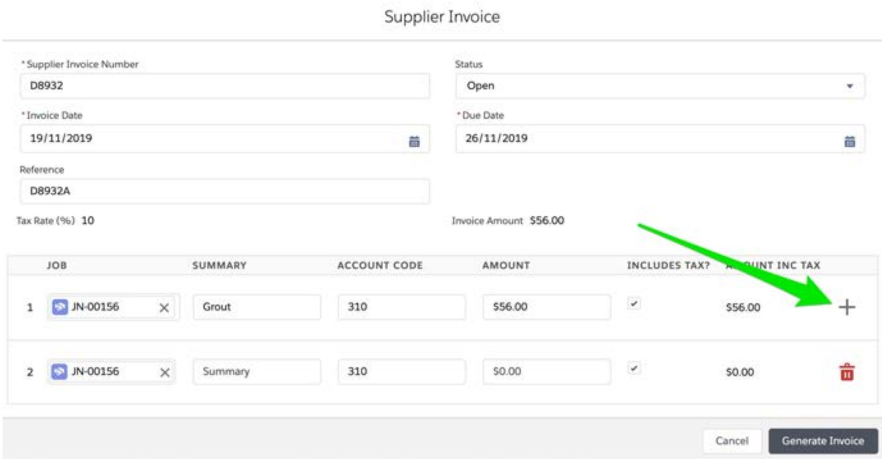
4. Enter the supplier invoice header details.



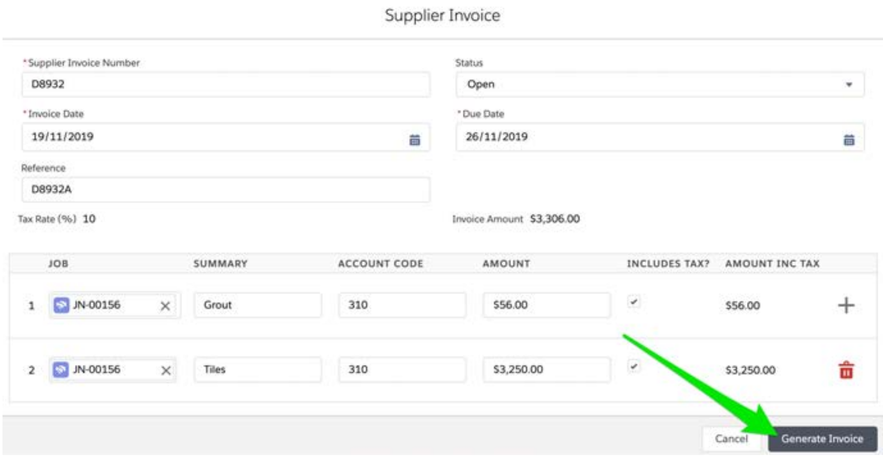
5. Now enter the first line, attributing the line to a job in the system.



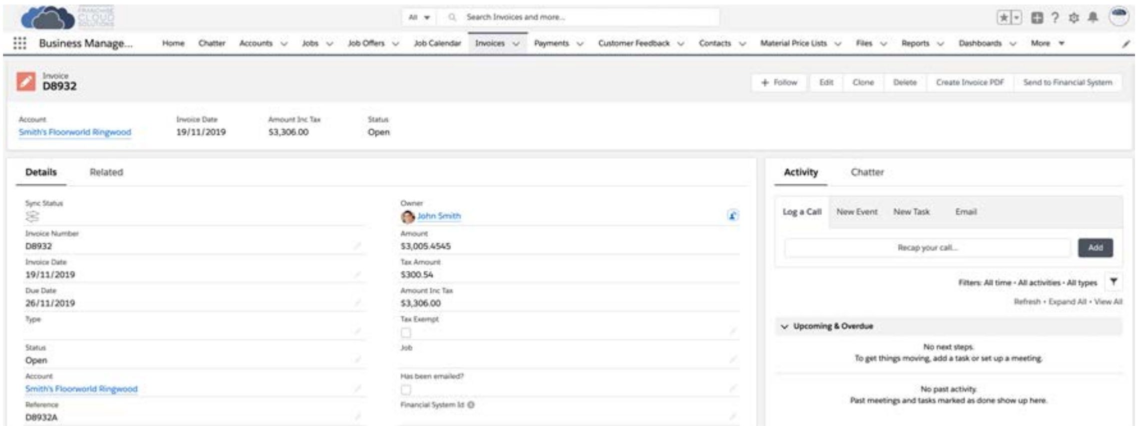
6. Press the + button to add a second line.



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



8. The supplier invoice is now generated.



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

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

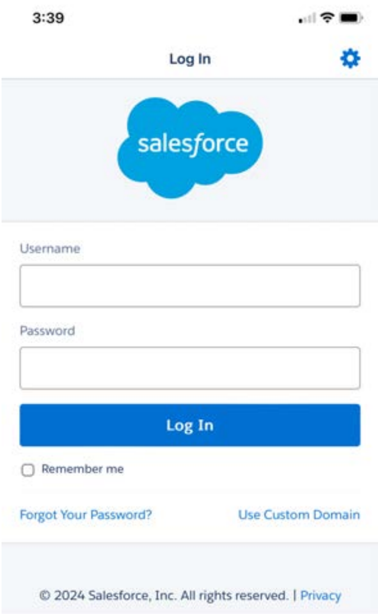
Salesforce produces the Salesforce Mobile app for iOS or Android. You will need to install Salesforce Mobile, and then to log into Salesforce Mobile using the same account you use to log onto Salesforce in the browser.

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` checkbox, then press **Log In**.

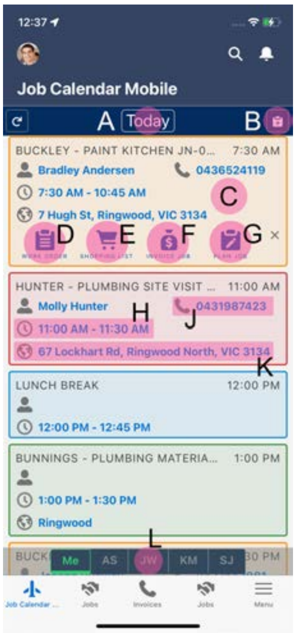


Viewing today's appointments

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

FInvoice 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

KMap 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.

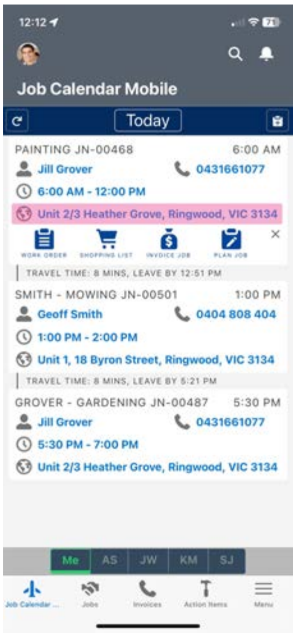
By default, the system shows your appointments for today.

- » 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.

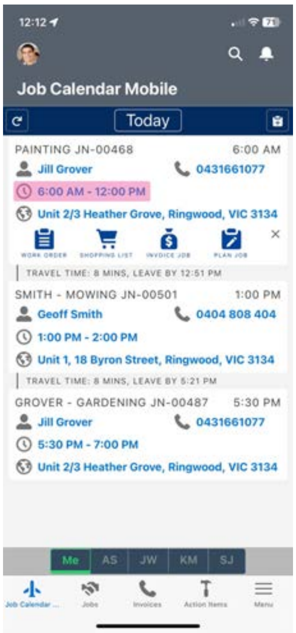
Tapping on the address will open the default map for your operating system:

- 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.

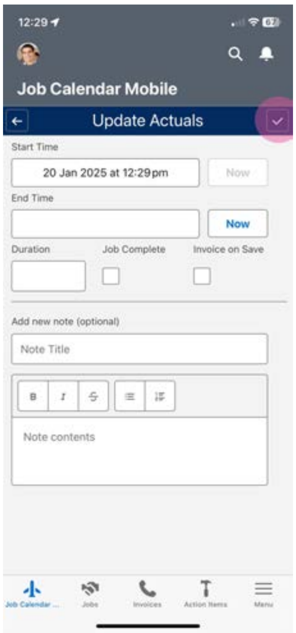
Time logging



Tap the clock or the time to:

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

Clock-on

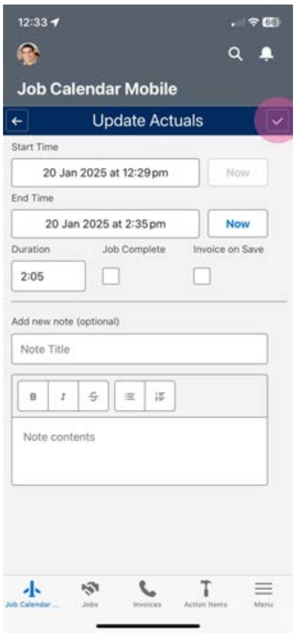


Press the **Tick** button to clock on with the current time.

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

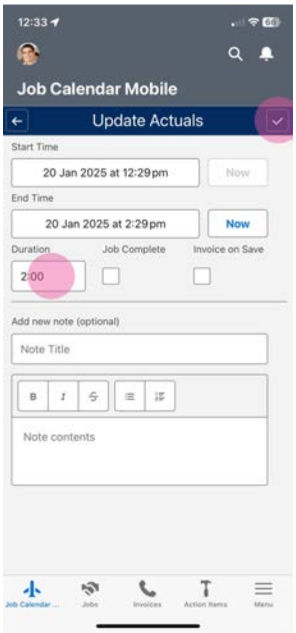


After you have finished the Job, press the **Tick** button to clock off with the current time.

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

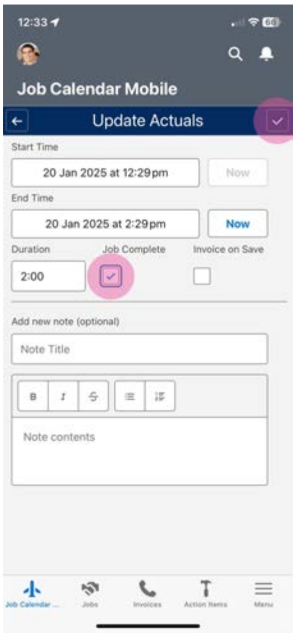


Instead of recording start and end times, you can choose to simply record duration.

To do this, enter into `Duration` either hh:mm or decimal values.

Press **Tick** when complete.

Job complete



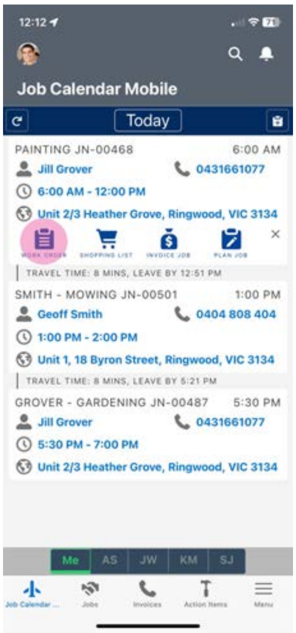
When the Job is finished, you can then mark the job as complete.

> 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



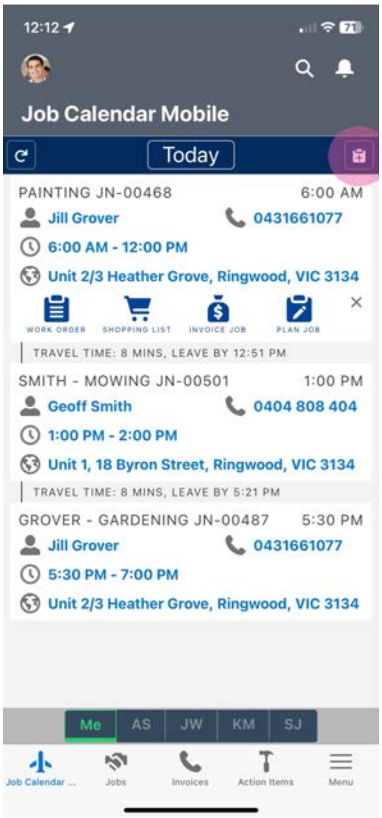
Tap to view the work order.

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 system will check for a duplicate account, and, on not finding one, create the account, job (including job line) and appointment.

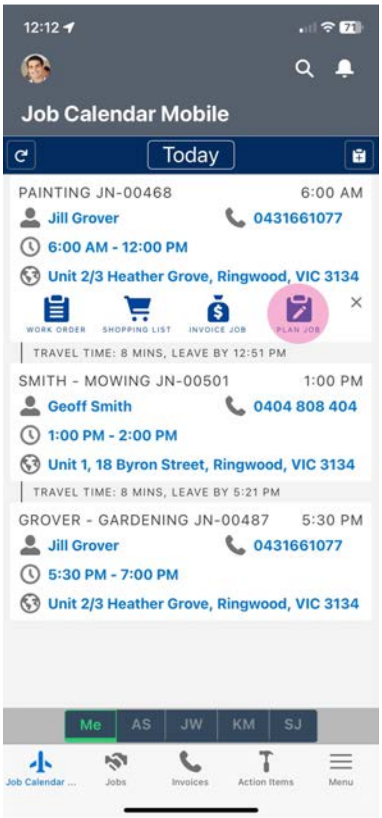
On record creation, the system presents the Quick Quote page to you. You can optionally generate and then send the quote to your new customer, *See* “Creating a quick quote” on the next page.

Creating a quick quote

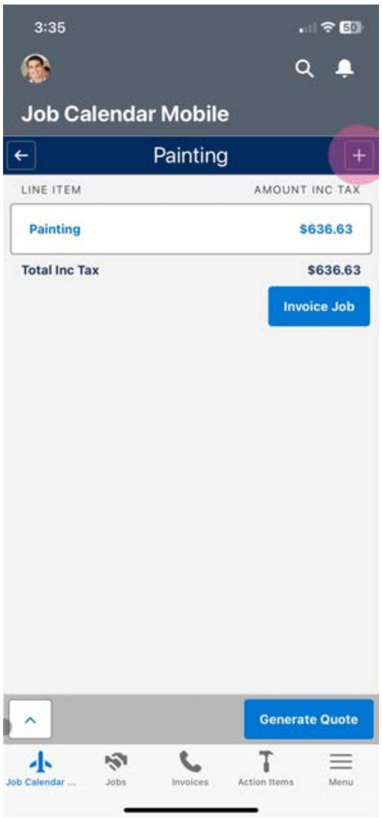
You can rapidly create and send a quick quote while on a job. This will allow you to provide a quote to a customer with the potential to have it accepted instantly.

To create a quick quote

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



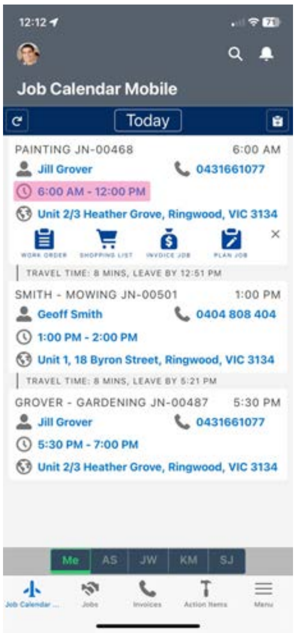
2. Press the **Plus** button to add a new line.



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.

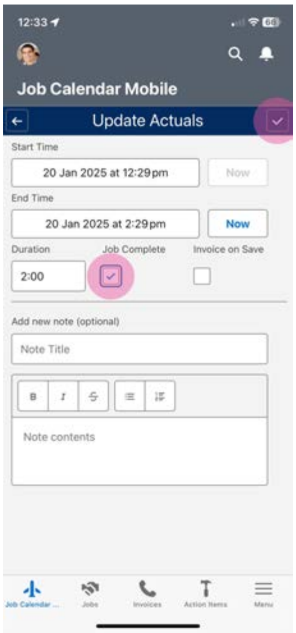
Marking a job as complete

Time logging



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

Job complete



Check the **Job complete** checkbox.

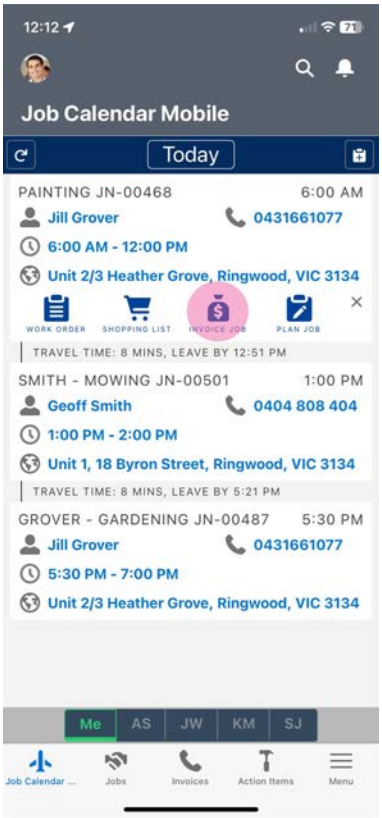
When a job is marked as complete, it will cause the job to transition to a new **Status** (e.g. Invoice) and will show as complete on all events linked to the job.

Invoicing a job

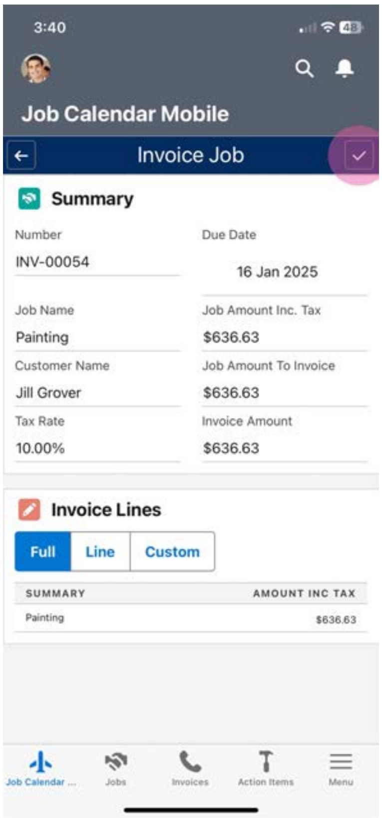
When you have completed a job you can generate the invoice right on your mobile device.

To generate an invoice on a mobile

1. From the appointment in Job Calendar Mobile, tap Invoice Job.



2. From the Invoice Job page, tap the tick.



Congratulations

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

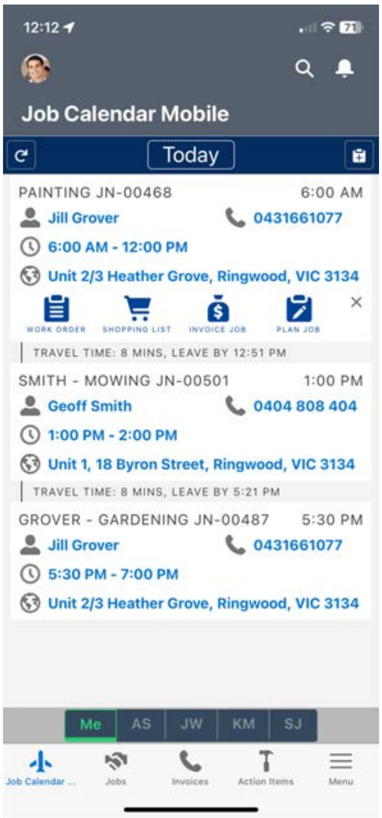
- Take payment by card or cash.
- Send the customer an email with an attached invoice PDF.

Changing an appointment

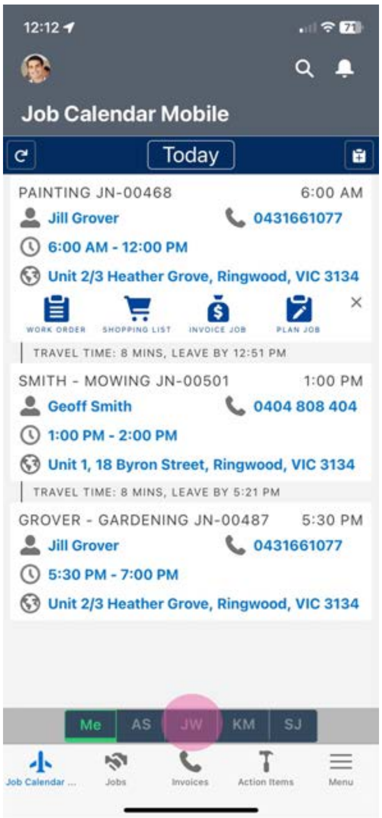
When you're on the road, you will often need to tweak your schedule. You can always modify the expected start times of appointments.

To change an appointment

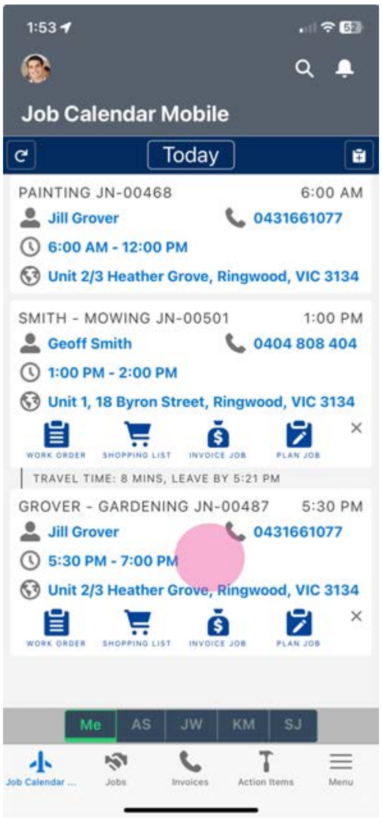
1. The first page of Salesforce Mobile shows your current day's Schedule.



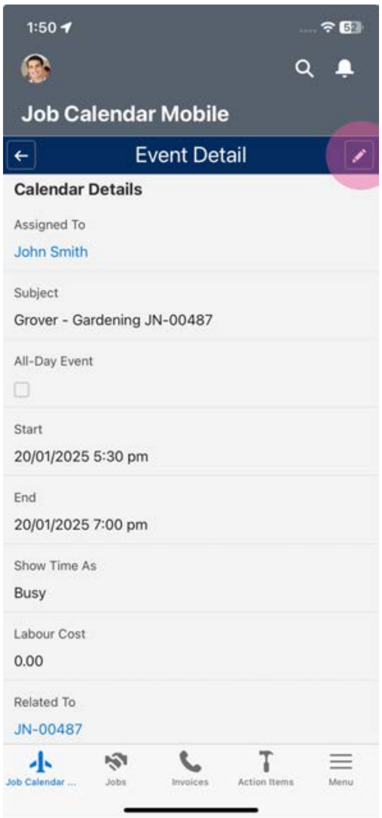
2. You can see the daily schedule of any of your resources by pressing their resource alias.



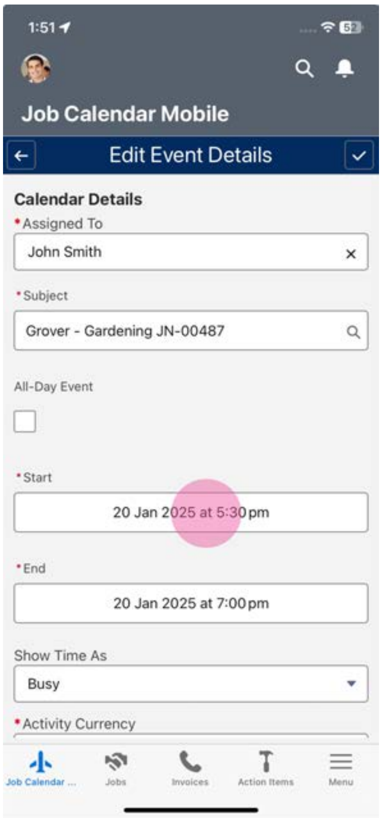
3. To modify an appointment tap the white space on the event.



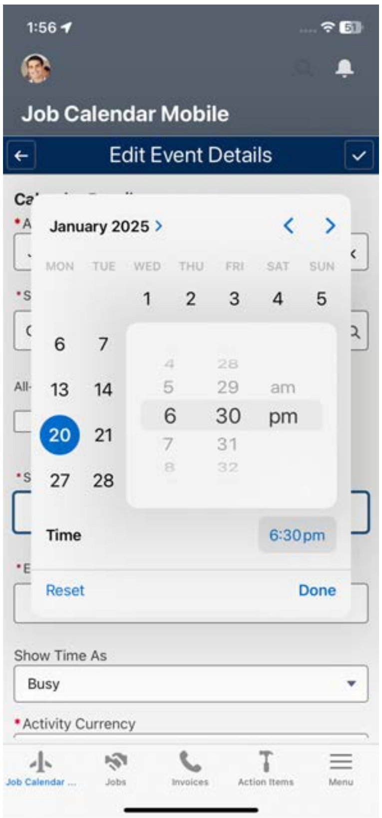
4. The **Event Detail** page appears. Click the **Edit** button.



5. Now press the `Start` field.

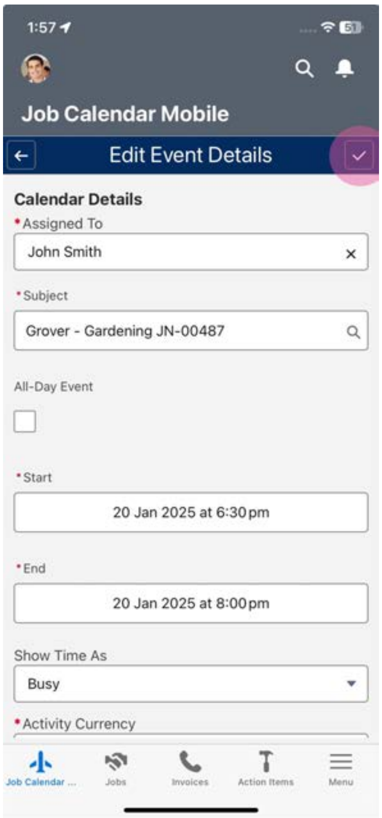


6. Change the appointment start to your desired time.

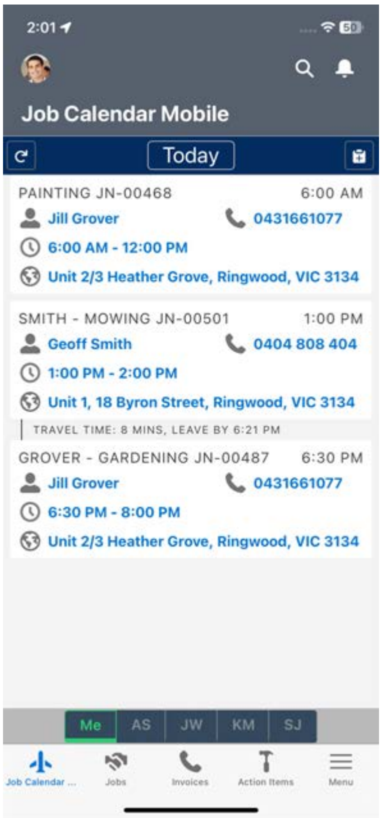


> Changing the start time will move the entire appointment.
>
> This is really handy because the most common action is simply to delay the start of an appointment while on the road. To actually change the length of the appointment, you will need to change both the `Start` and the `End` time.

7. When you are finished editing the appointment, press the **Tick** button.



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

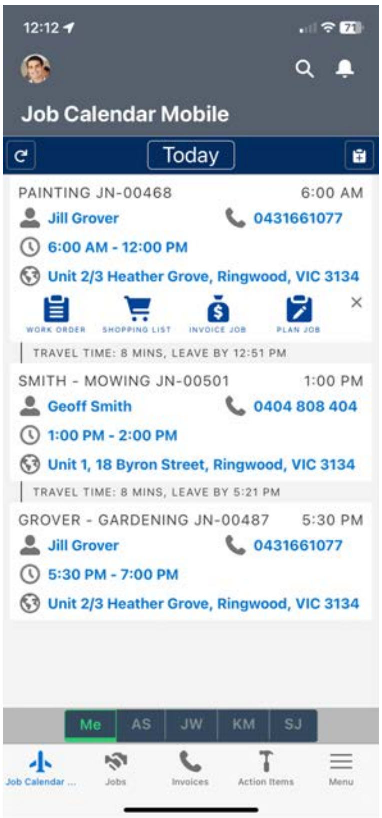


Scheduling a job

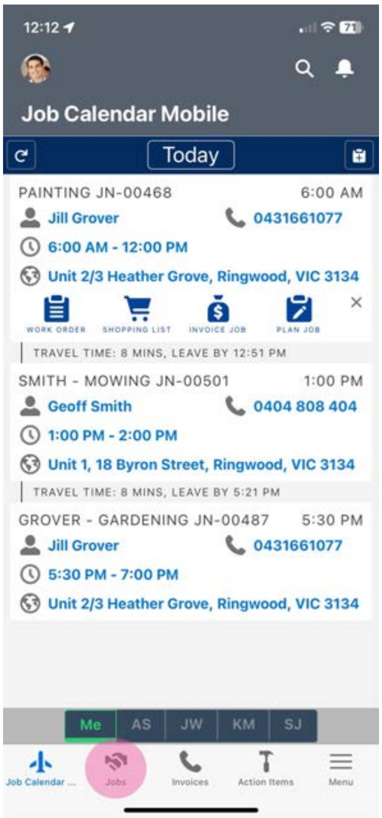
During the day you will sometimes need to squeeze in another appointment. To do this, you can schedule an appointment from the Job directly in Salesforce Mobile.

To schedule an appointment

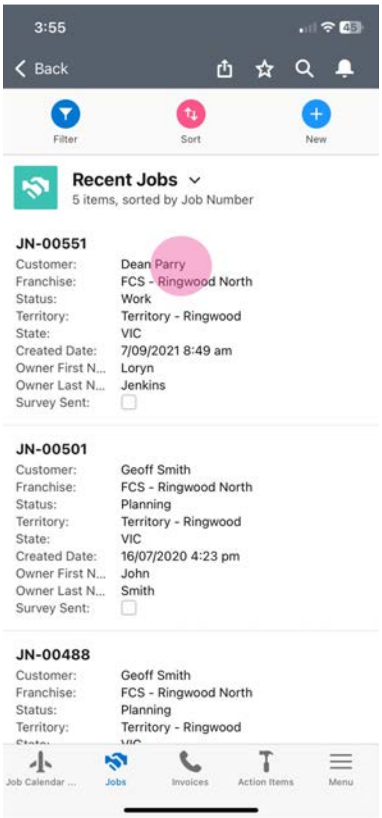
1. The first page of Salesforce Mobile shows your current day's Schedule.



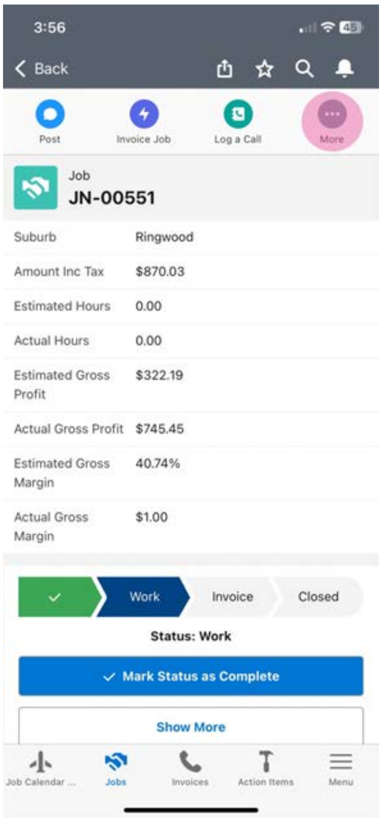
2. Choose **Jobs**.



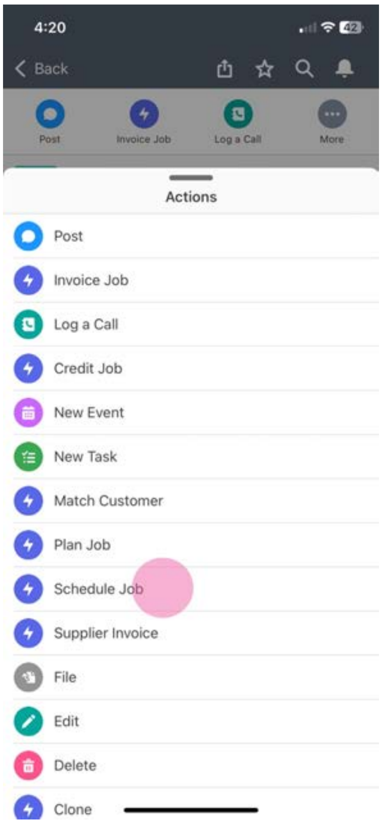
3. From the **Jobs** list page, select the desired **Job**.



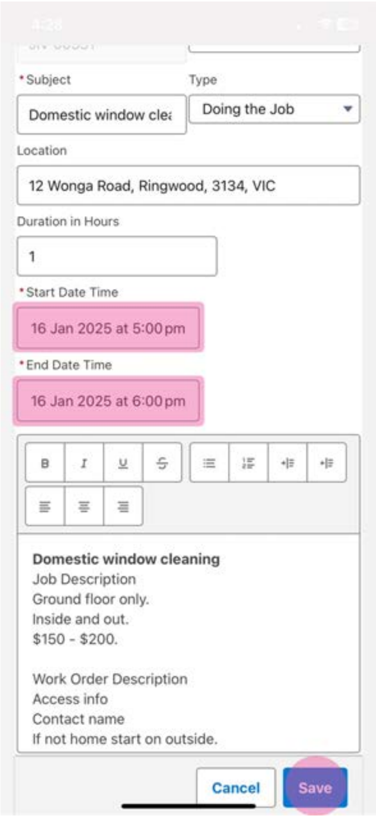
4. From the menu buttons at the top of the page, choose **More**.



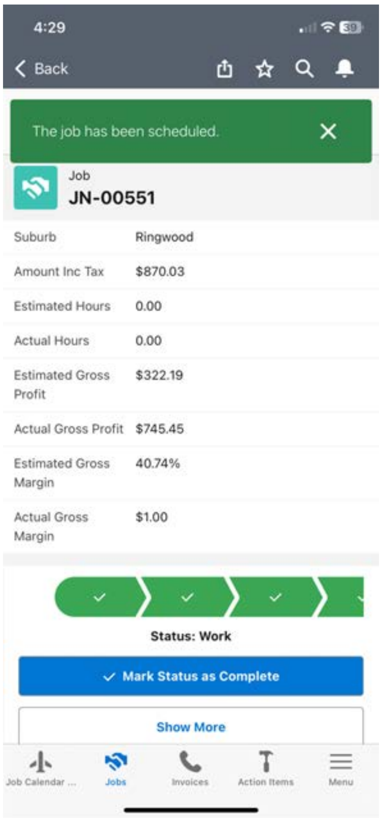
5. Select **Schedule Job**.



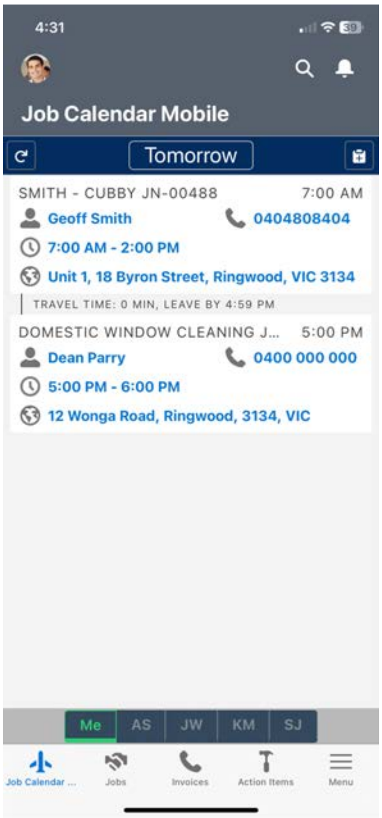
6. From the **Schedule Job** page, set the `Start Date Time` and `End Date Time`, then press **Save**.



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.



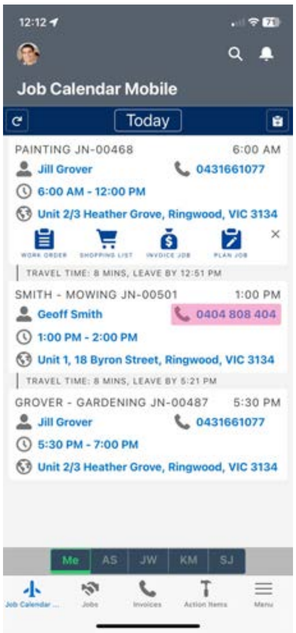
8. The system shows you your updated daily schedule.



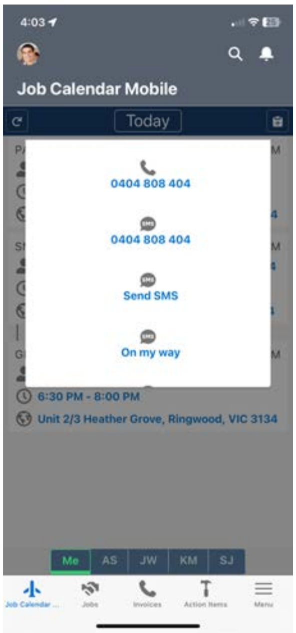
Contacting the customer

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

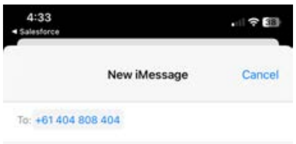


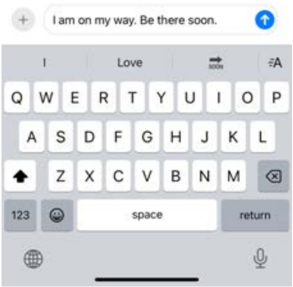
Tap on the customer's mobile phone number.



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

Tap the most useful link.



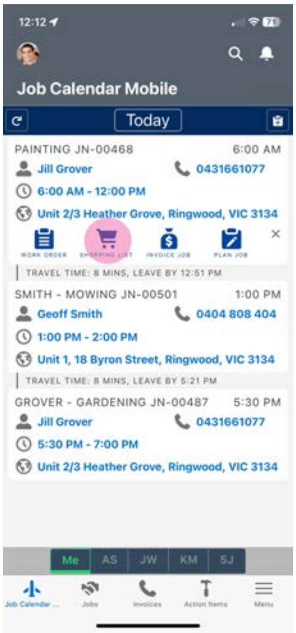


Once you have made your choice, the system transfers you to your phone or SMS app to complete the communication.

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

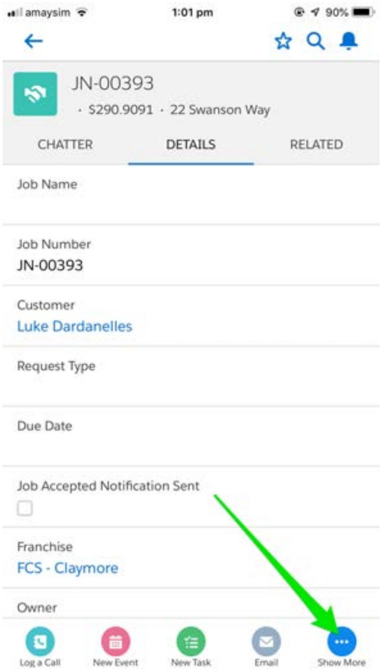
To log a call

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

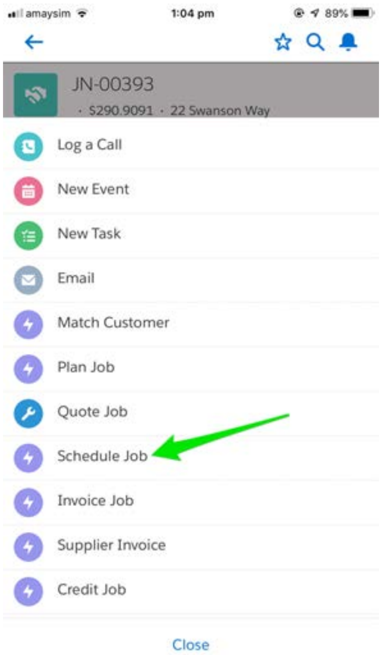
Rapid job scheduling

To schedule a job using Salesforce mobile

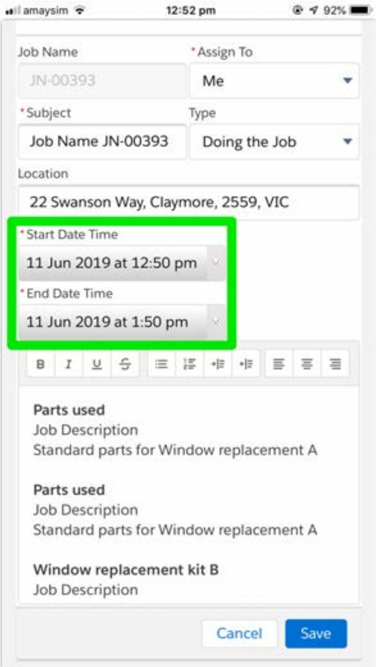
1. From the Job page, press **Show more**.



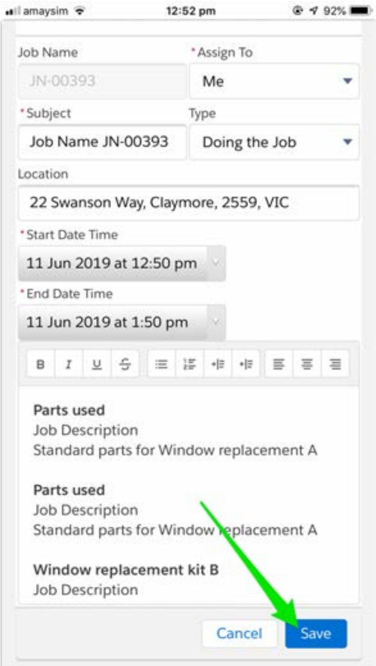
2. From the menu, select **Schedule Job**.



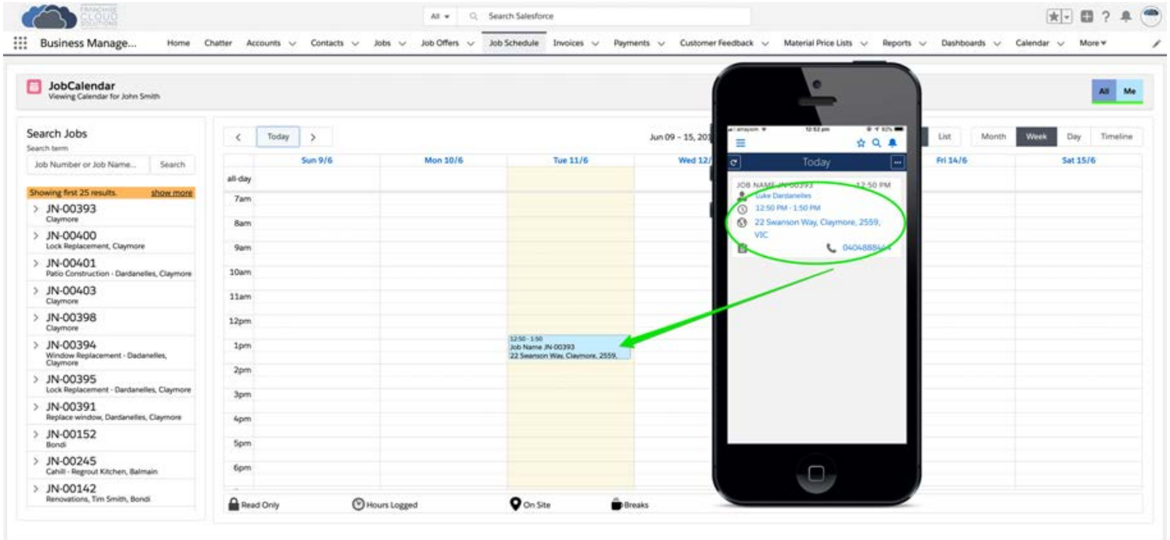
3. From the Schedule Job page, enter the **Start Date Time** and **End Date Time**.



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



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



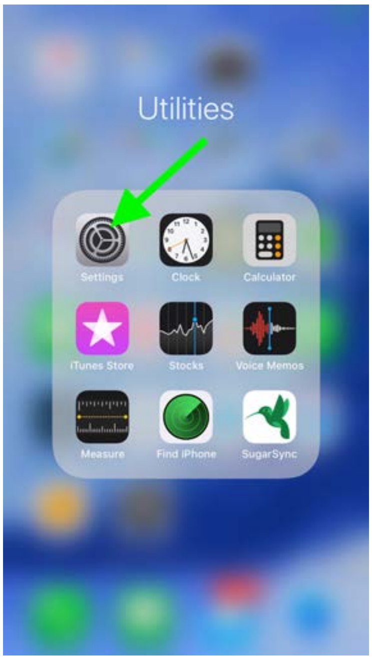
Taking notes, photos and videos in the field

You can take notes in the field through

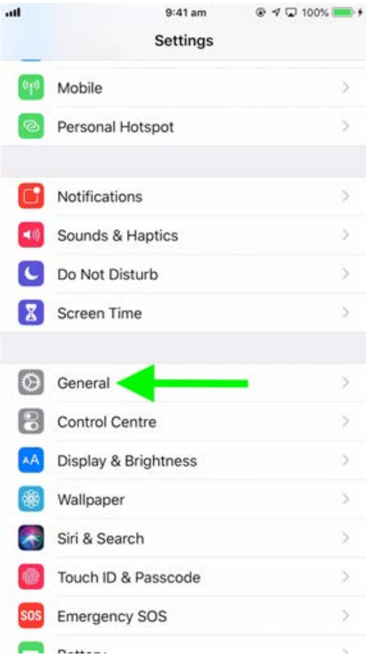
- entering text on your phone
- dictation (with automatic conversion to text)
- filming video with verbal commentary

To take notes in the field

1. Set up your iOS device for automatic dictation.
    a. Select **Settings**.

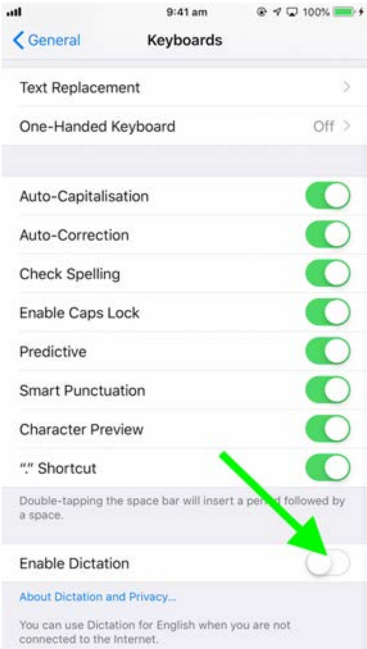


    b. Select **General**.

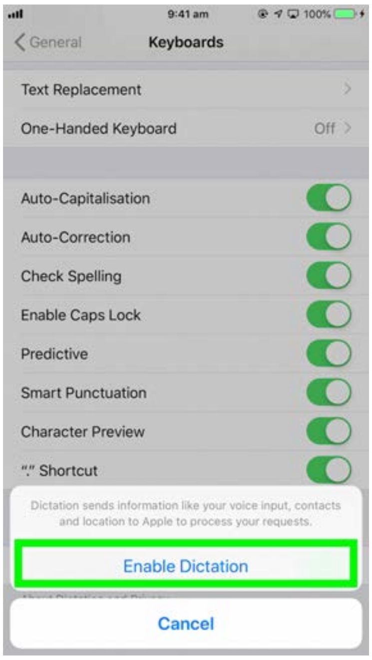


c. Select **Keyboard**.

d. Press **Enable Dictation**.

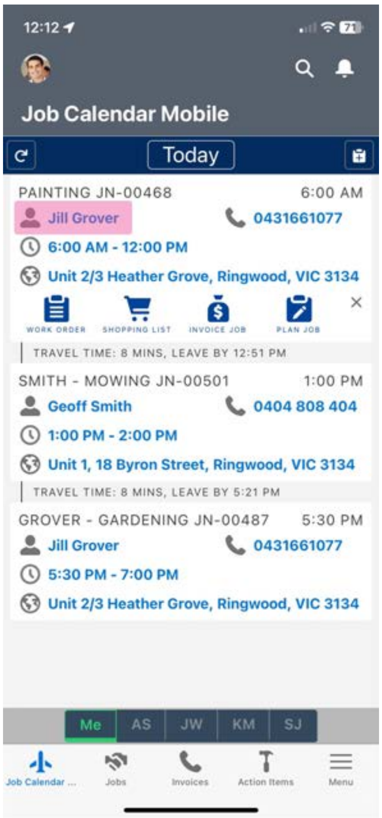


e. Confirm **Enable Dictation**.

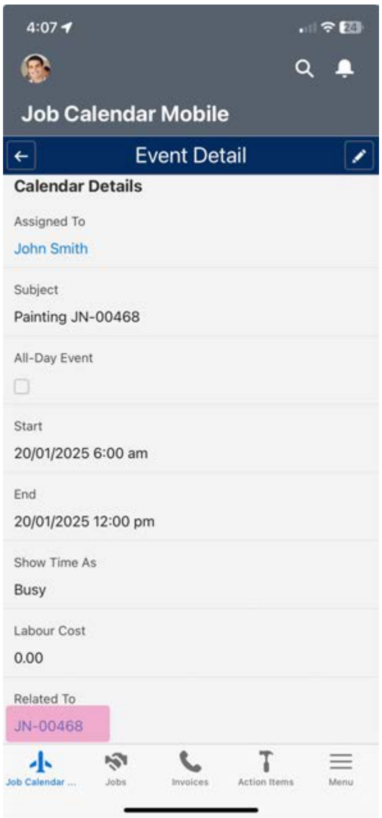


f. You are now ready to use your system as a dictation device.

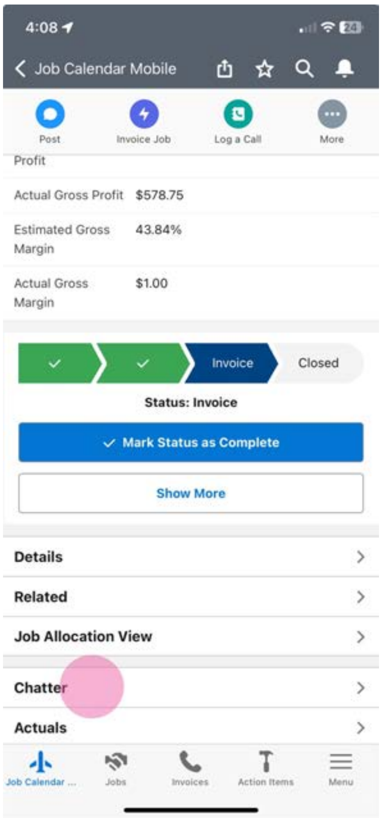
2. From the event summary, tap on the person's name.



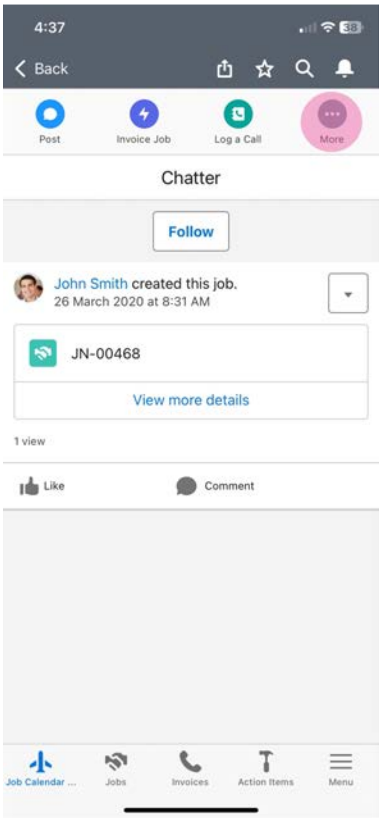
3. From the **Event Detail** screen, tap the Job number.



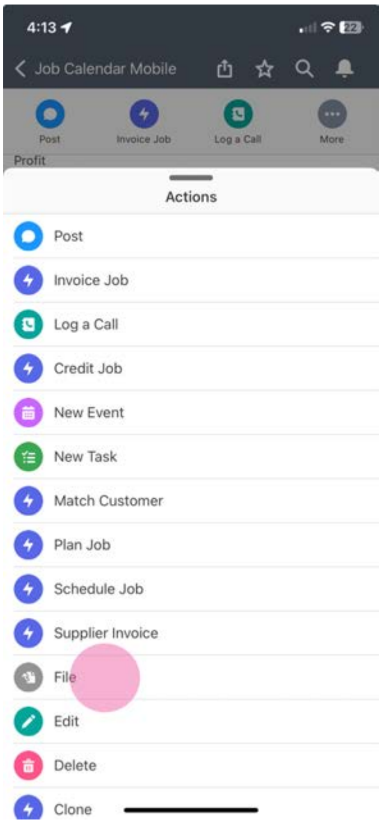
4. From the **Job**, tap the **Chatter** tab.



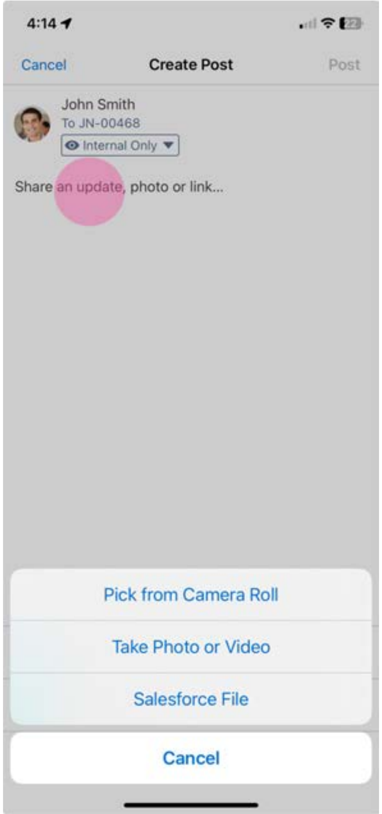
5. From the **Chatter** page, click the **More** button.



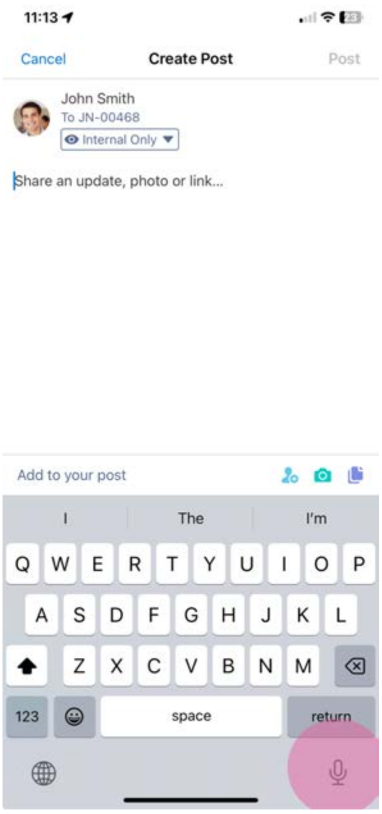
6. Tap **File**.


4:13
Job Calendar Mobile
Post
Invoice Job
Log a Call
More
Profit
Actions
Post
Invoice Job
Log a Call
Credit Job
New Event
New Task
Match Customer
Plan Job
Schedule Job
Supplier Invoice
File
Edit
Delete
Clone

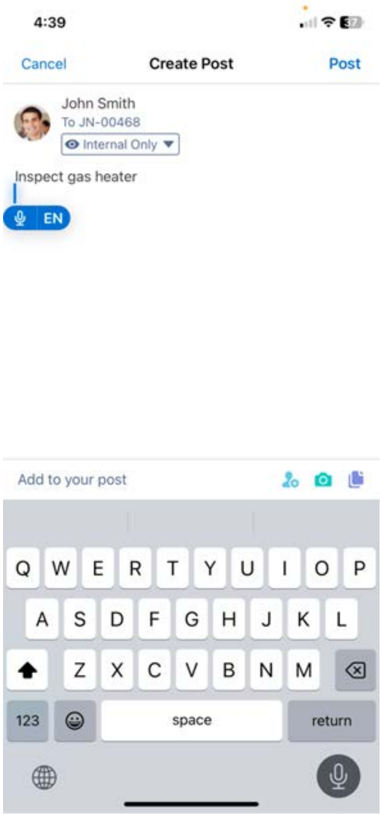
7. From the **Chatter** page, click on the default text in the Post.



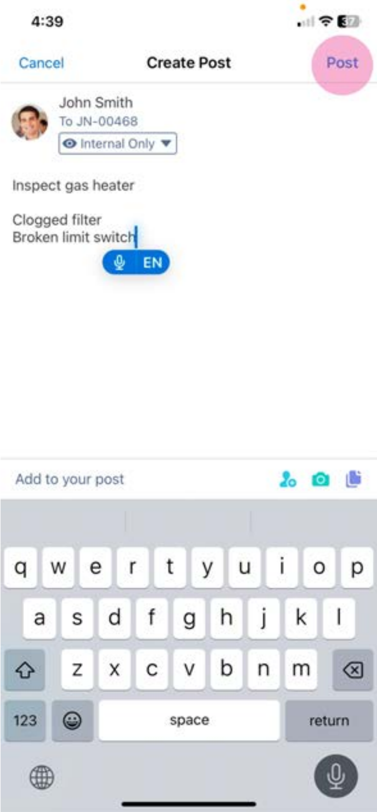
8. From the on-screen keyboard, tap the **Microphone** button.



9. Now dictate your note.



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

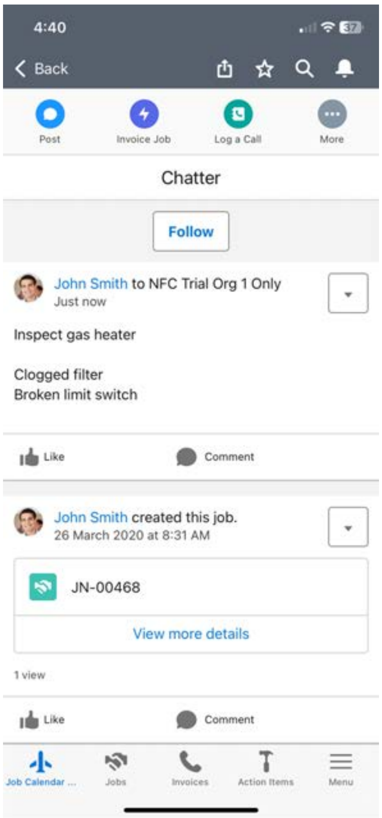


To end a sentence, say “Period”

For a new line, say “New line”

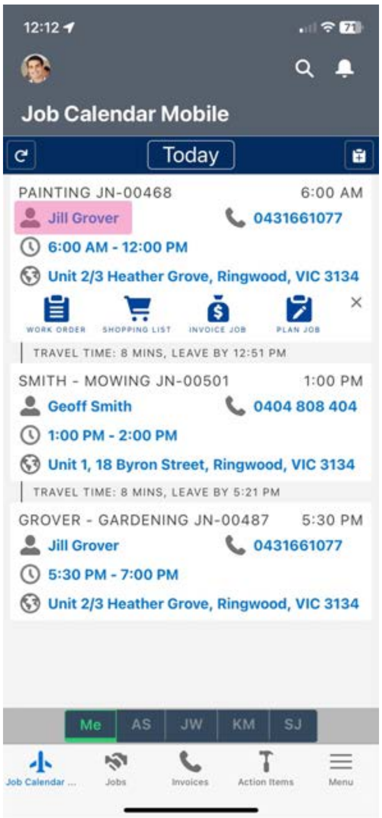
For a new paragraph, say “New paragraph”

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

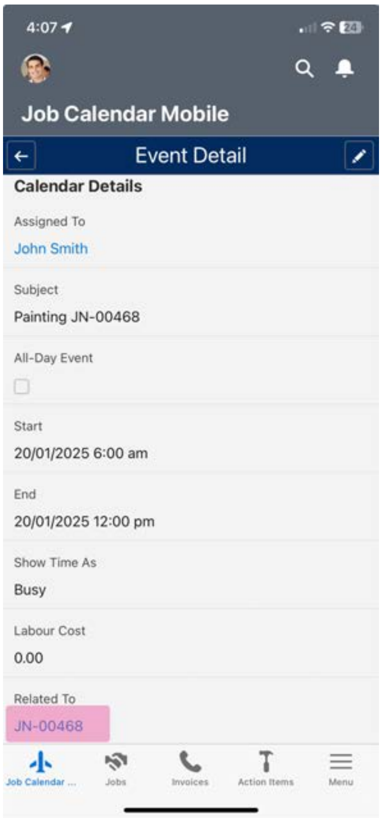


To record a video note

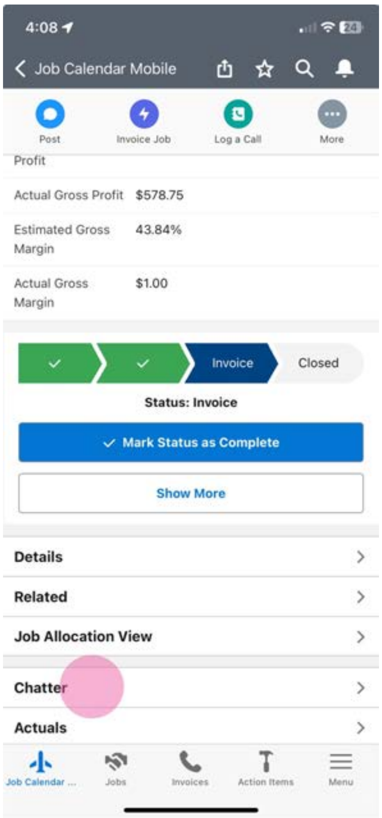
1. From the event summary, tap on the person's name.



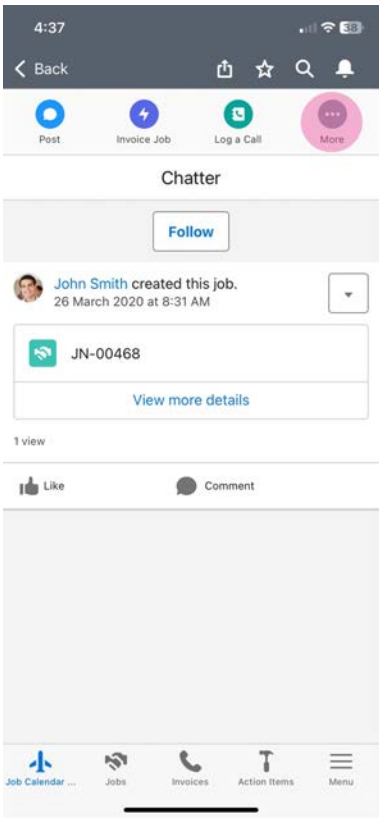
2. From the **Event Detail** screen, tap the Job number.



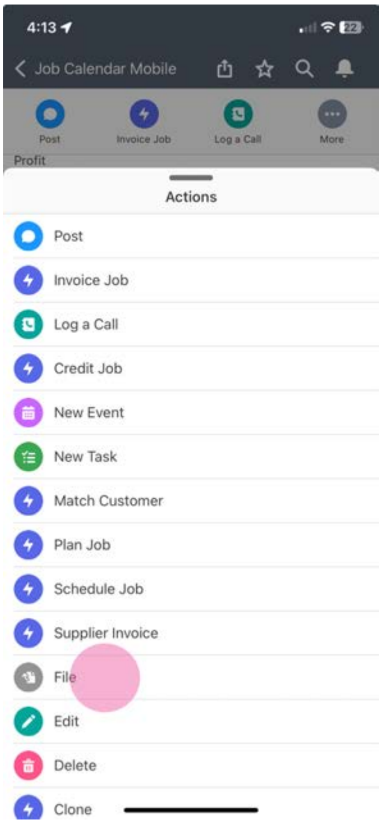
3. From the **Job**, tap the **Chatter** tab.



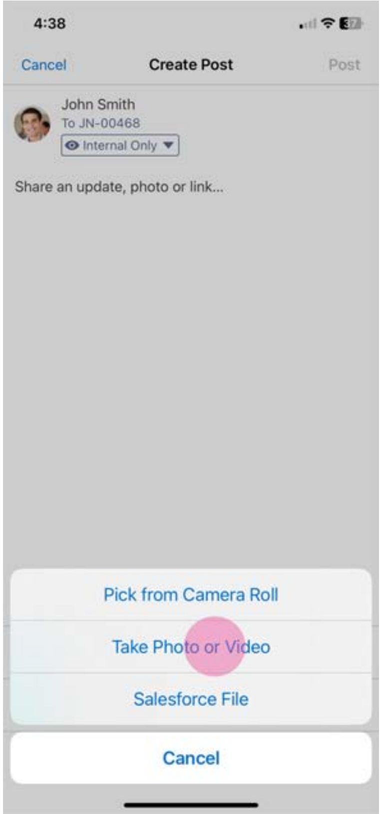
4. From the **Chatter** page, click the **More** button.



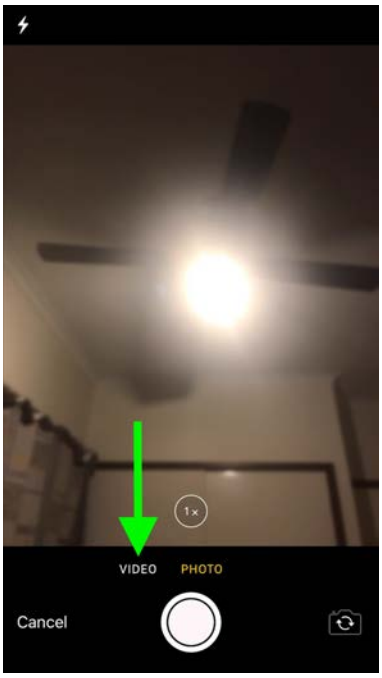
5. From the **Chatter** page, click the **File** button.



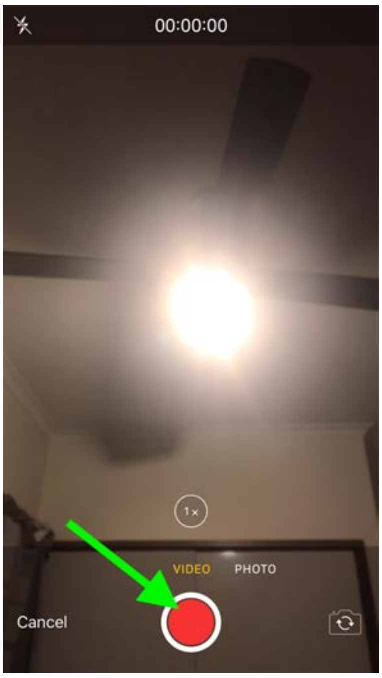
6. From the menu, select **Photo / Video**.



7. From the camera, select **Video**.



8. Press the **Start Record** button. Record your video and narrate your note.

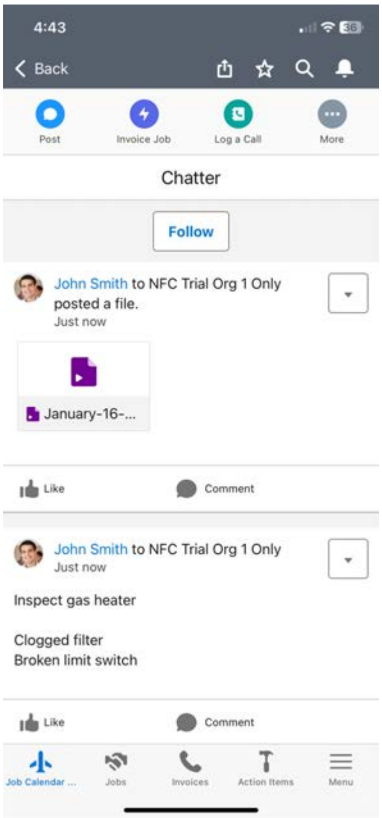


9. When finished, press the **Stop Record** button.

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.



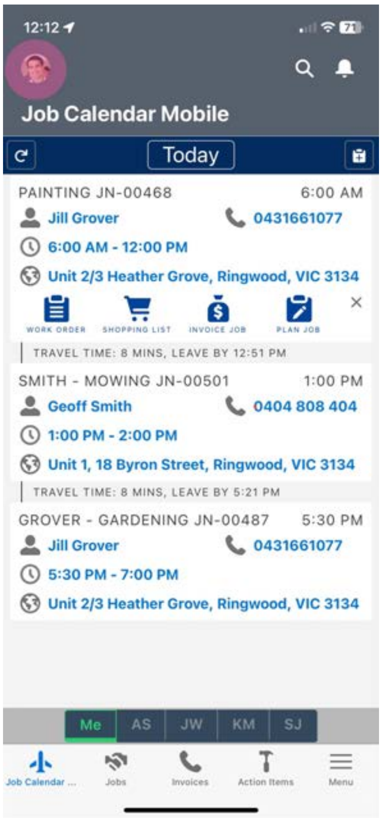
Clearing cached screens and data

To minimize downloads, the Salesforce mobile app aggressively caches screens and data. This works really well but can delay seeing changes around software updates.

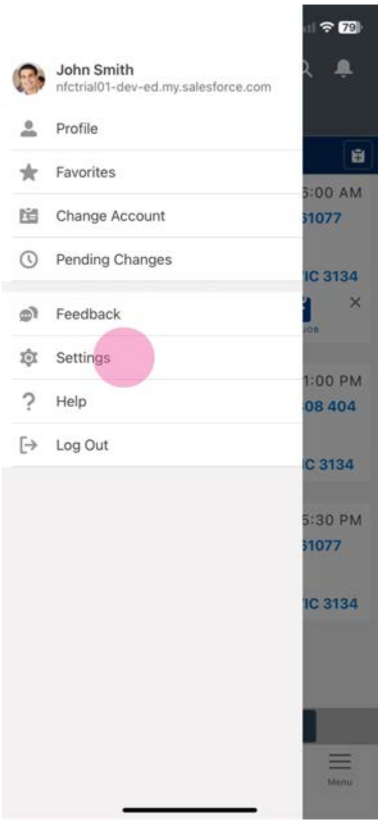
If you know there has been a software update, you may want to clear the cache to see the updated screens.

To clear cached screens and data

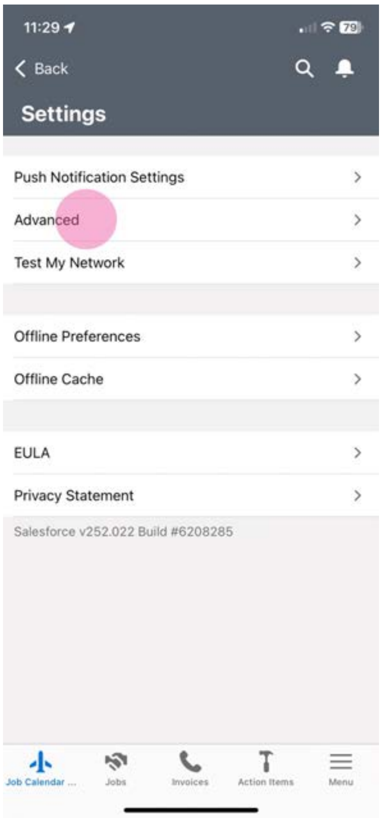
1. From Job Calendar Mobile, tap the user icon.



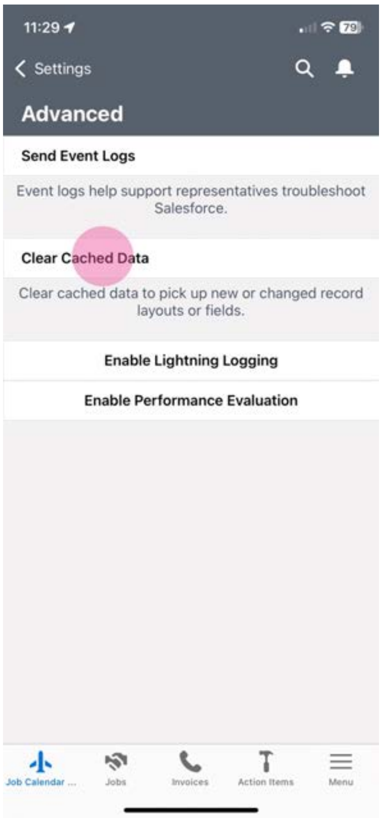
2. Then tap **Settings**.



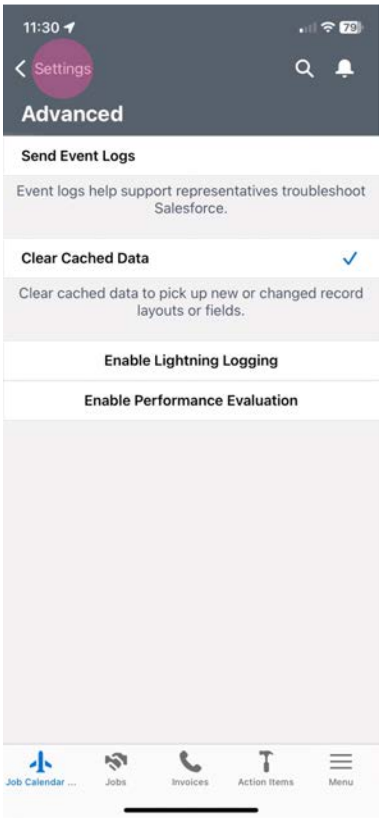
3. Now tap **Advanced**.



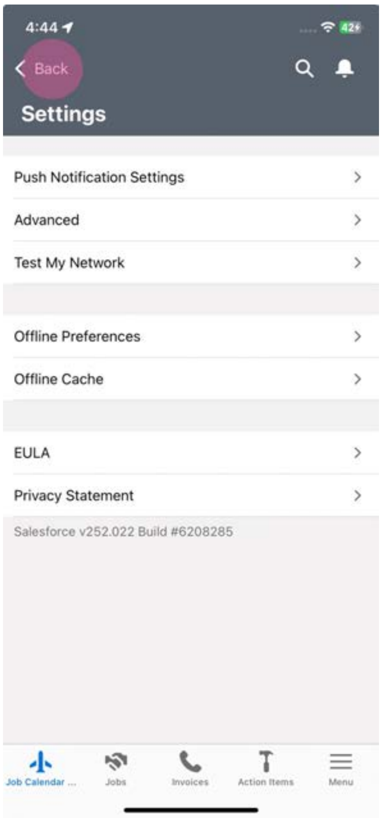
4. Tap the **Clear Cached Data** button.



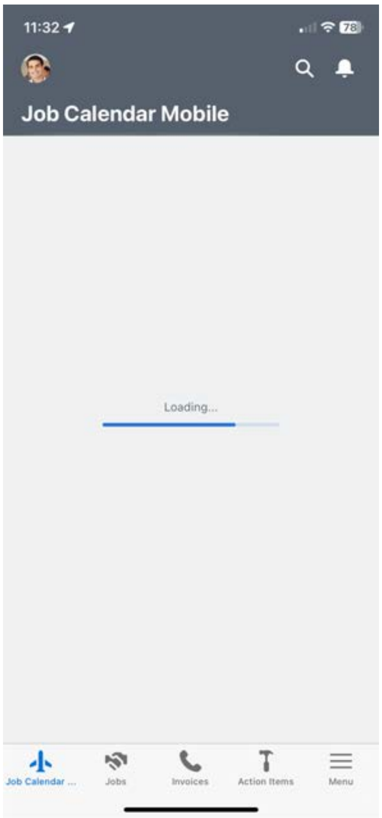
5. Now you can return to the home screen. Tap **Settings**.



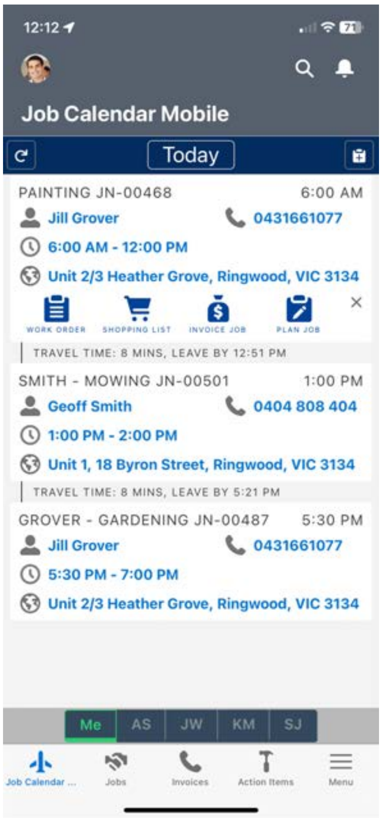
6. Now tap **Back** or **Job Cal Mobile**.



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

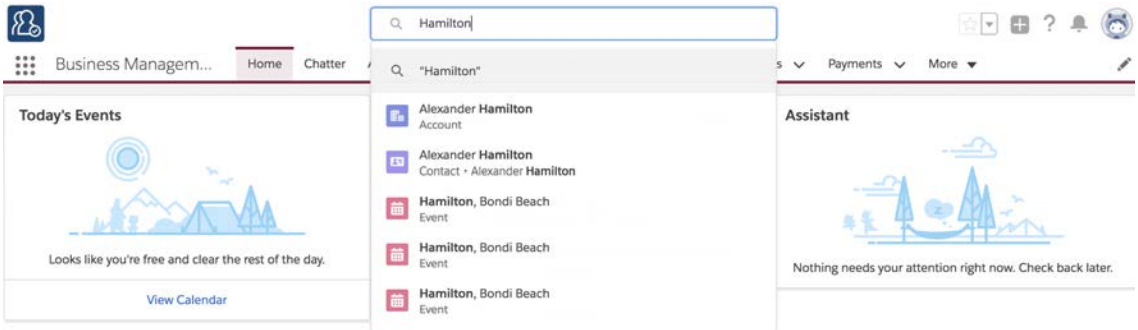
Business Management provides a range of tools for franchisees to be able to quickly and easily field customer requests. The following topics deal with a range of tasks common to Job, Account or Contact records, encompassing taking notes, creating follow up tasks, sending emails, and scheduling meetings.

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.

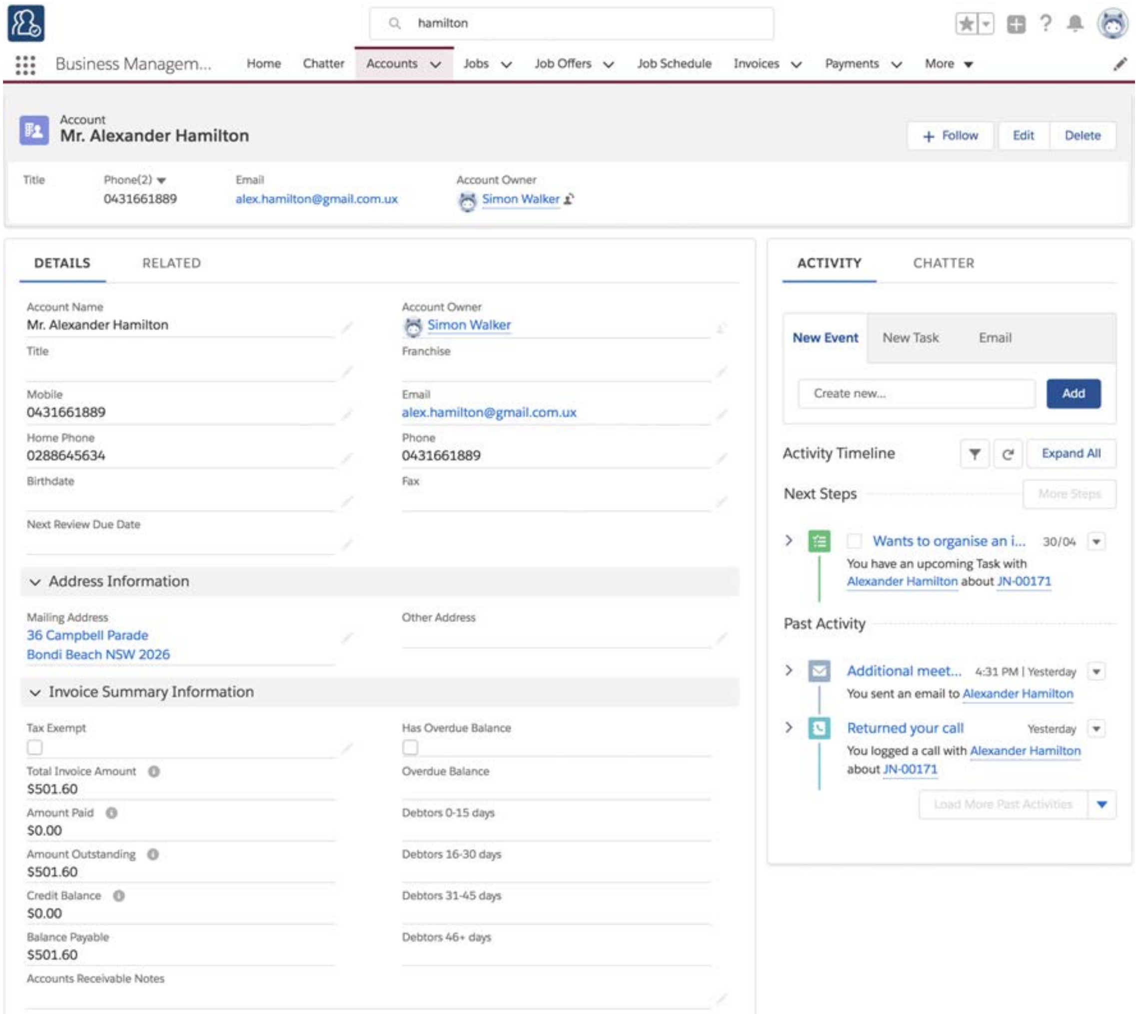


   Salesforce displays a list of records that match the name you entered. The type of each record is displayed.

2. If you see a corresponding **Account**, select the account.

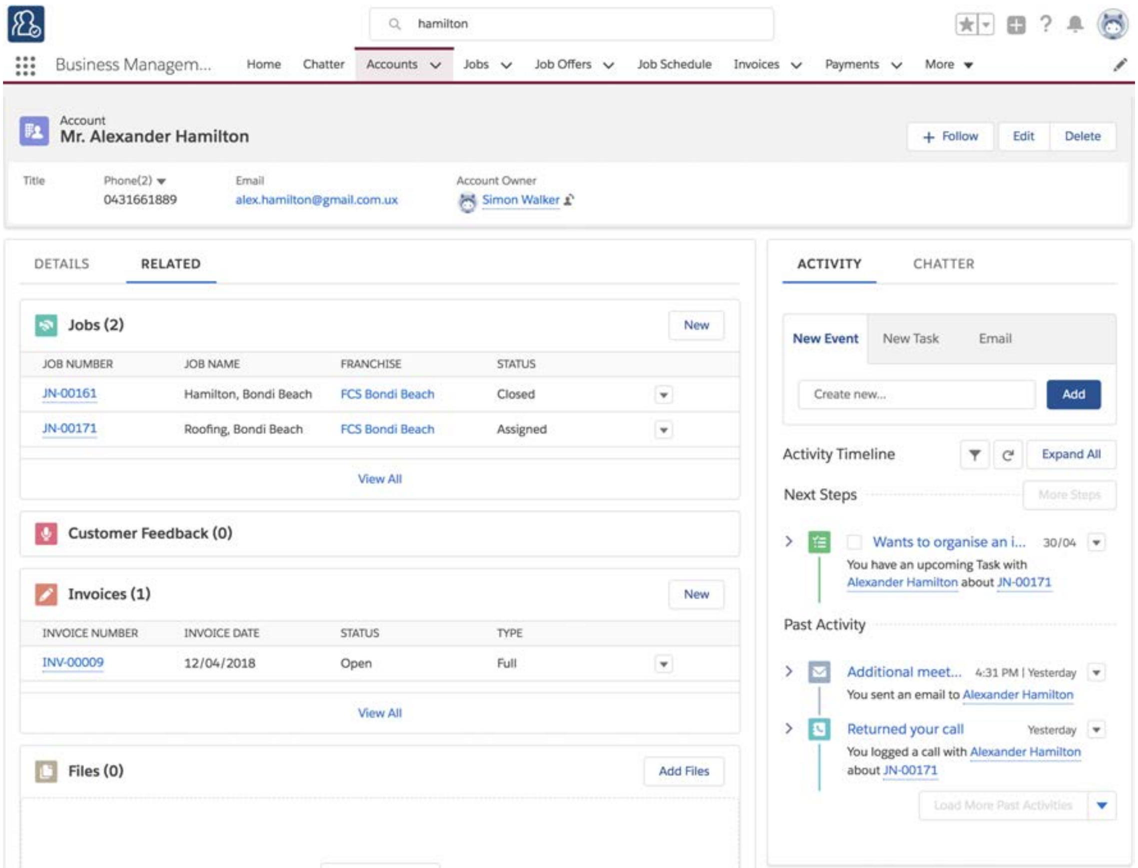
> If you do not see the person's account, go to step 5.

Within the **Account**, you have access to all their recent details and preferences.

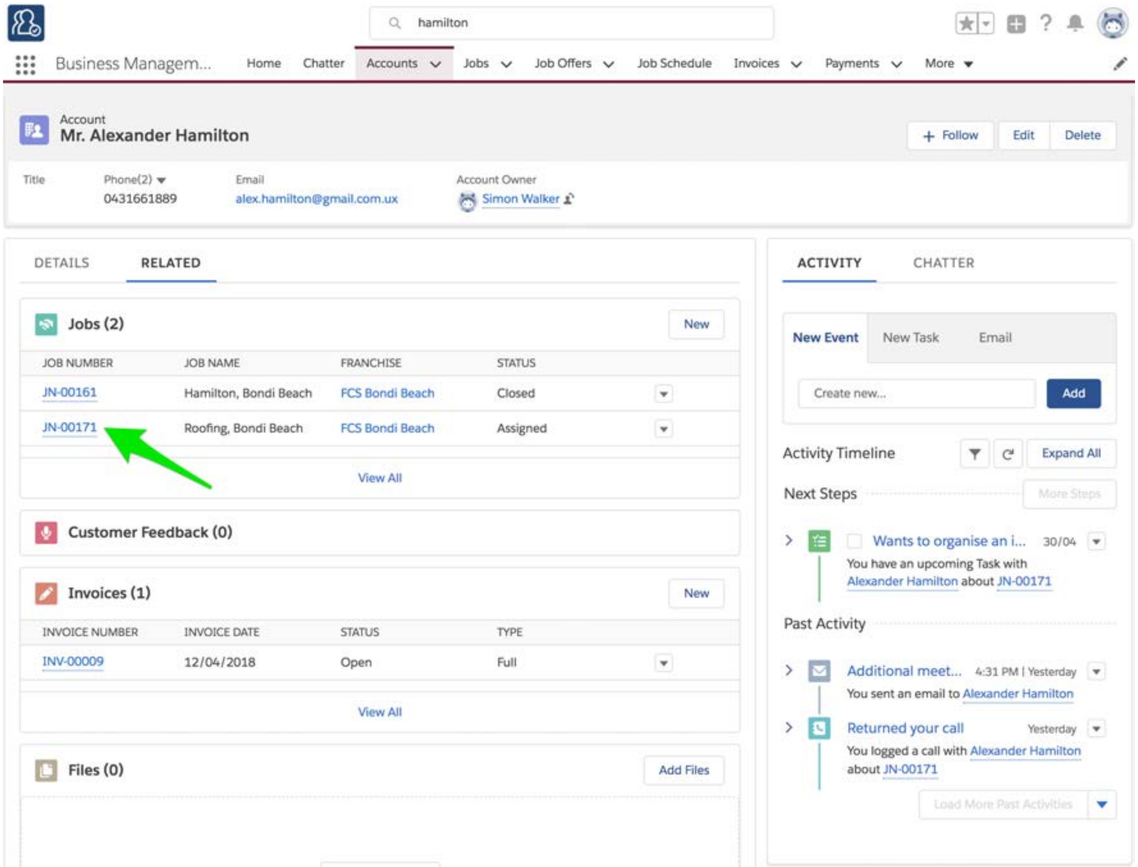


- Name and contact details
- Address information
- Summary of invoices and payments owing
- Marketing information and communication preferences

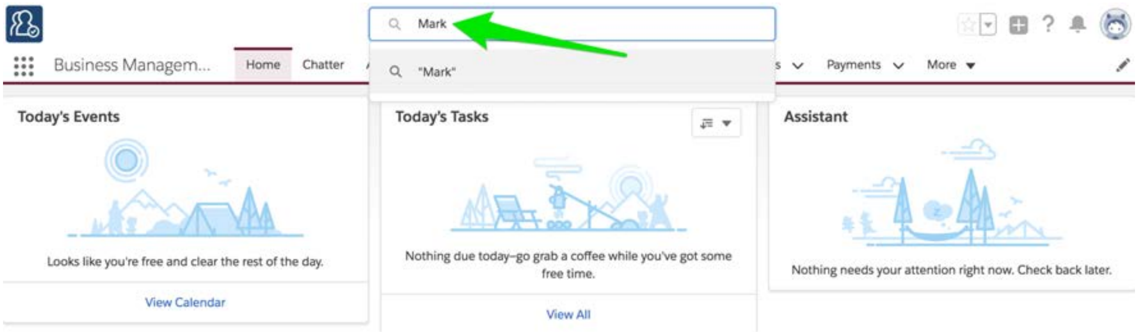
3. To see current and historical jobs, select the **Related** tab.



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

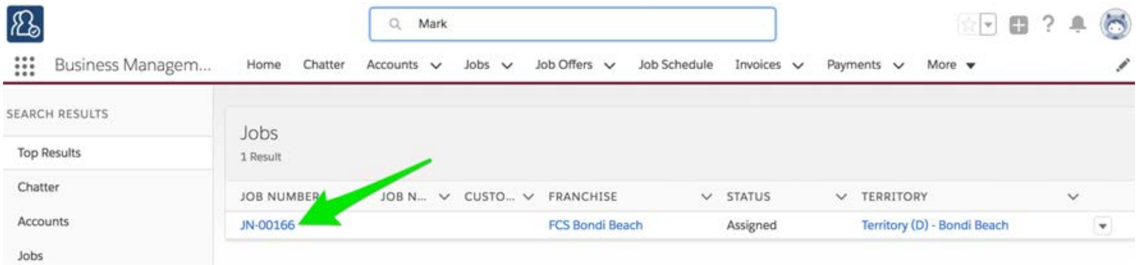


5. If you have searched for a person’s name and do not find them ...



... 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.

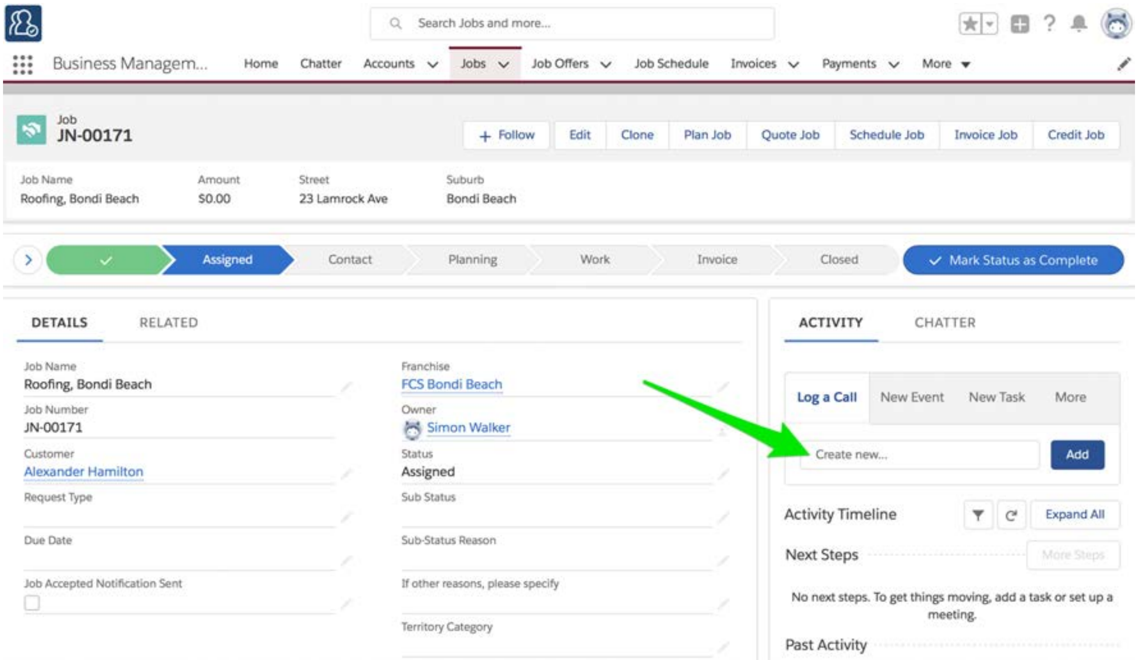
> To enter new customers, *See* “How to create an account for an individual customer” on page lxxix or *See* “How to create an account for a business” on page lxxx.

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.

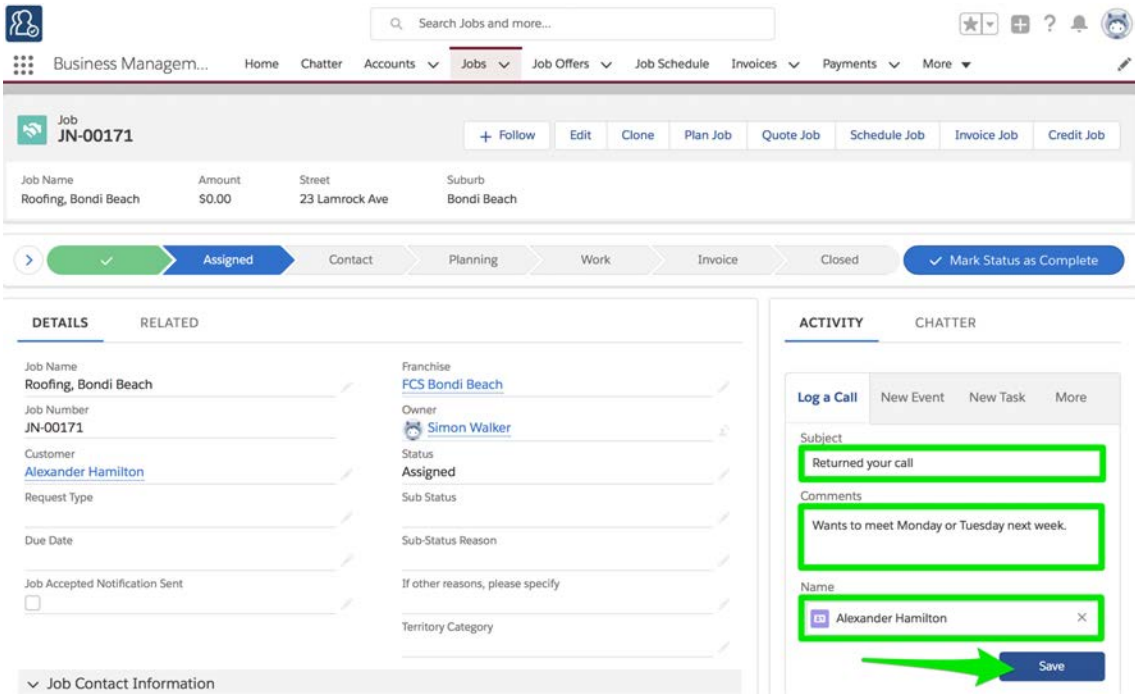
To record information

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…**

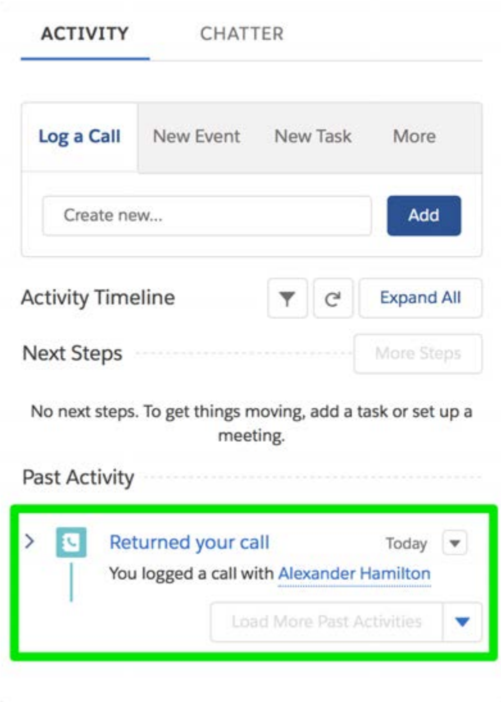


The **Log a Call** activity pane displays.

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



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

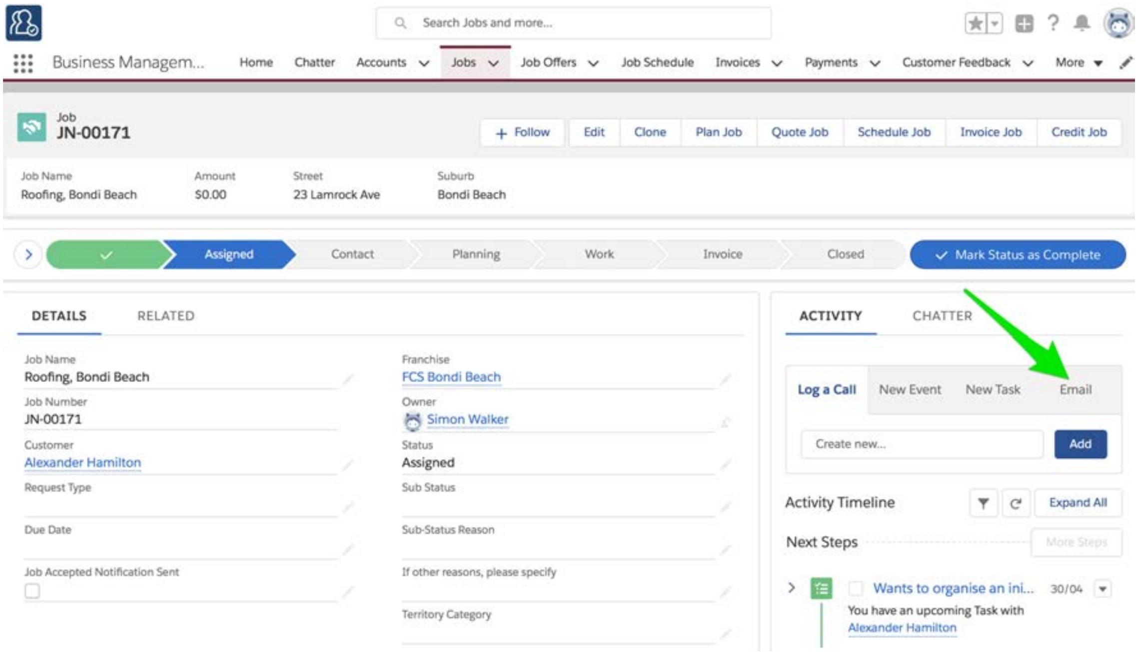


How to send an email

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.

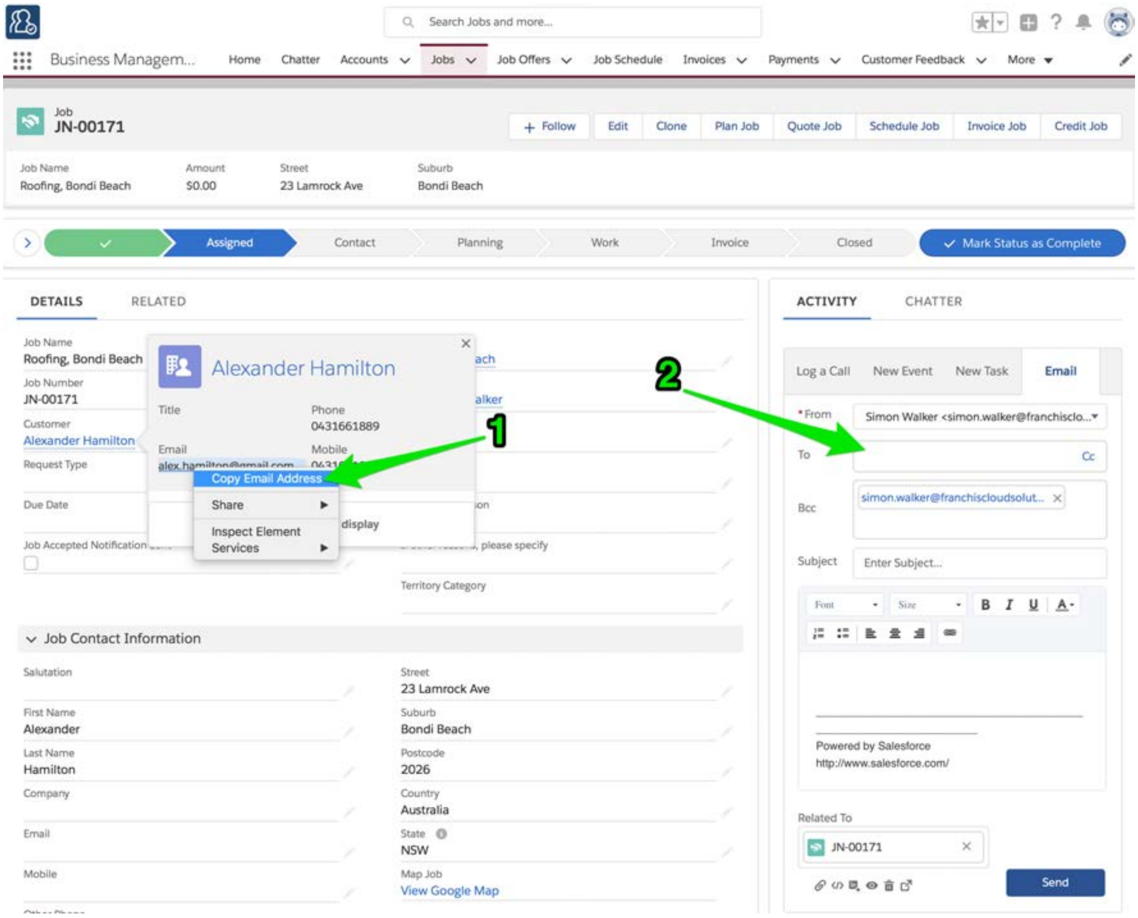
To send an email

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.

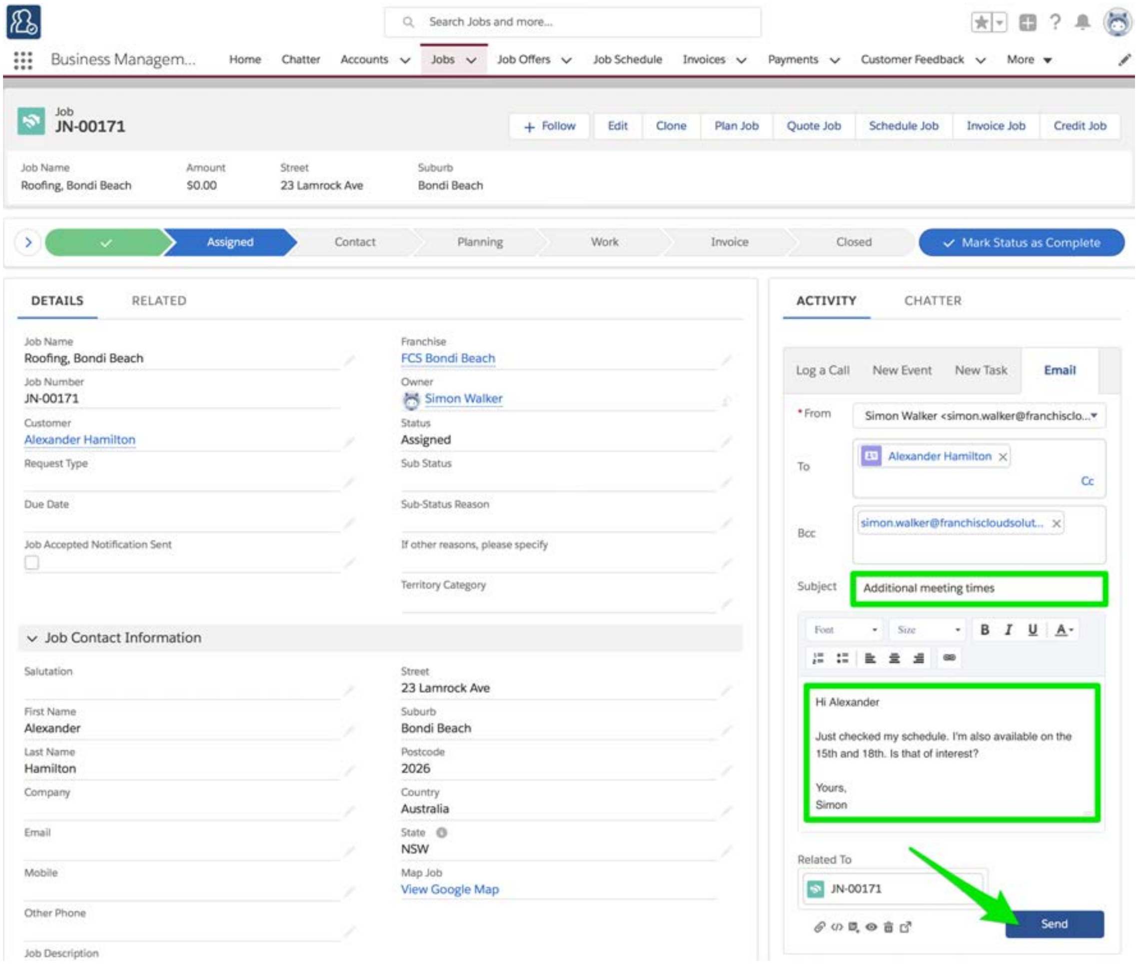


The **Email** tab displays, and shows the owner of the record in the `From` address.

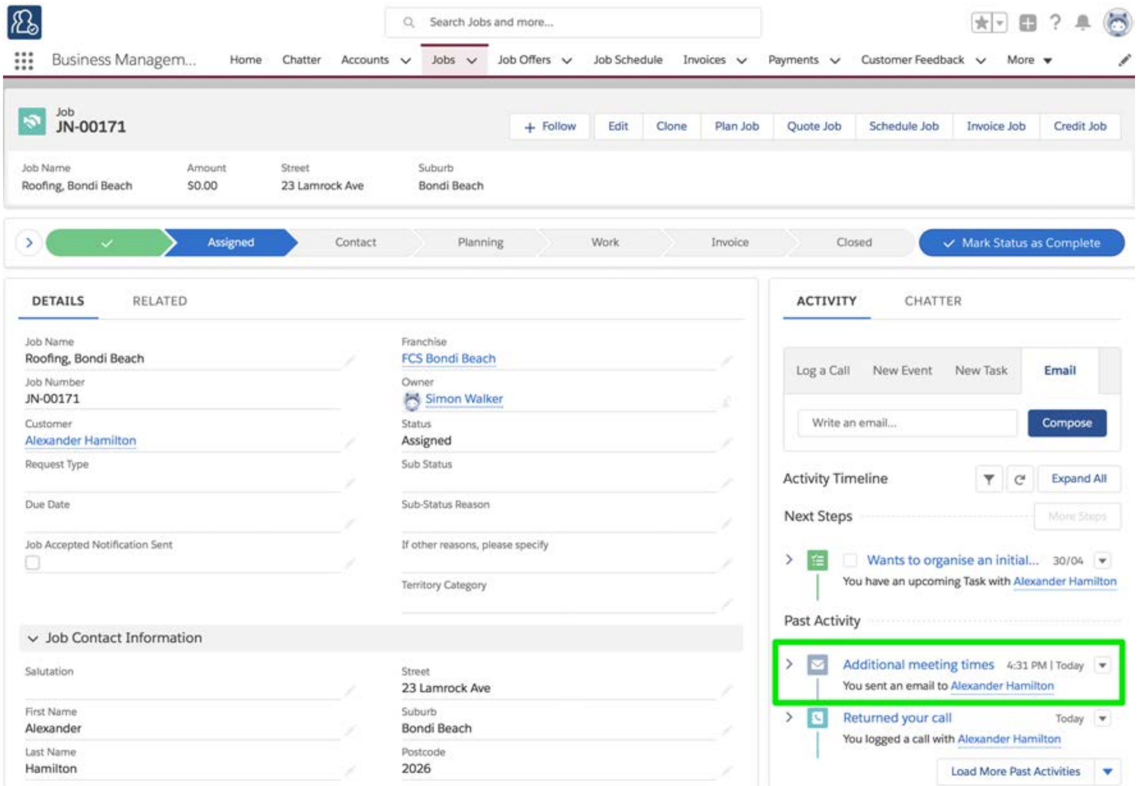
3. Copy the email address from `Account Name` and paste it into the `To` field.



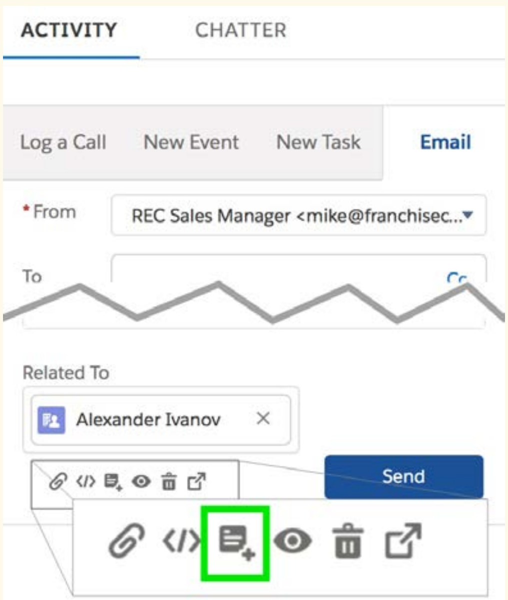
4. Complete `Subject` and `Details` then press **Send**.



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



You can easily streamline the emails you send by creating standardized templates. For more information refer to the Salesforce documentation, Create a Template.



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

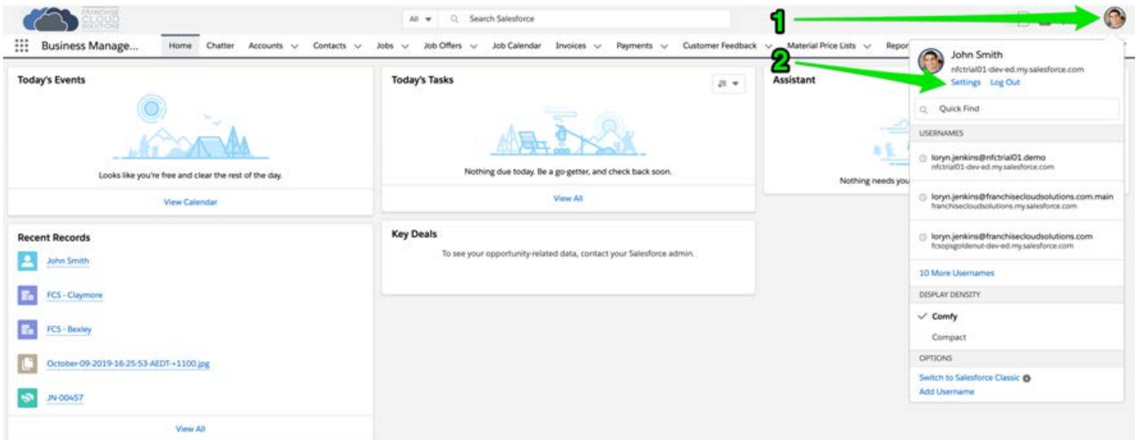
Setting up a signature block is something almost everyone does when they first set up their personal settings within Salesforce.

> **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.

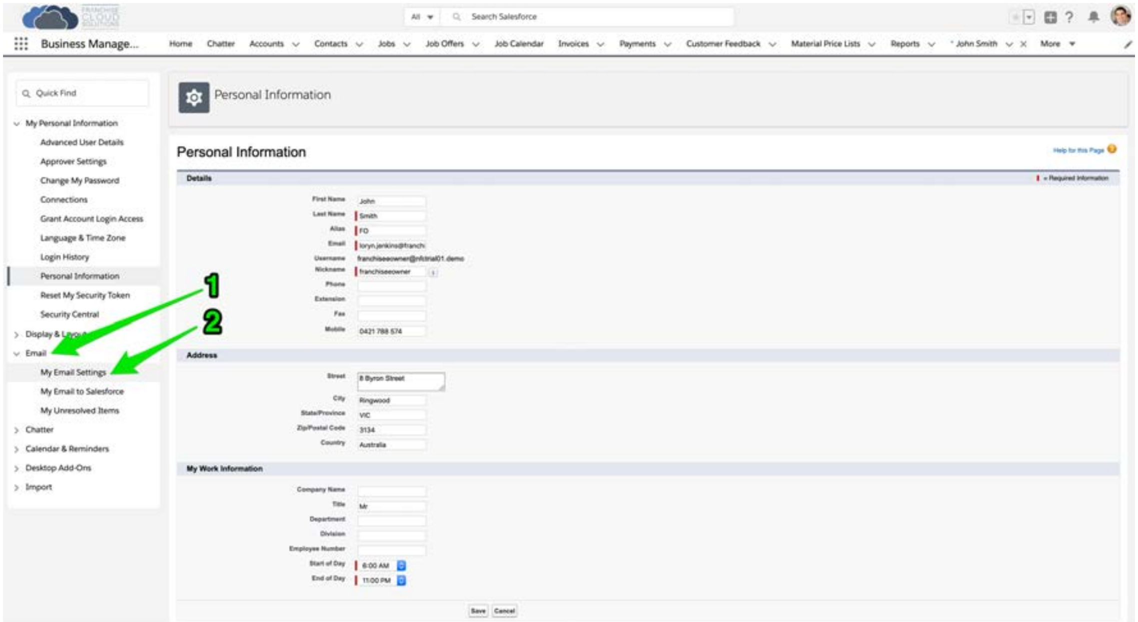
> Ask your system administrator to upload the image or images you need for your signature block. Your system administrator will hand back to you the code to include in your image block that will make your image or images appear in your signature block.

To set up a signature block

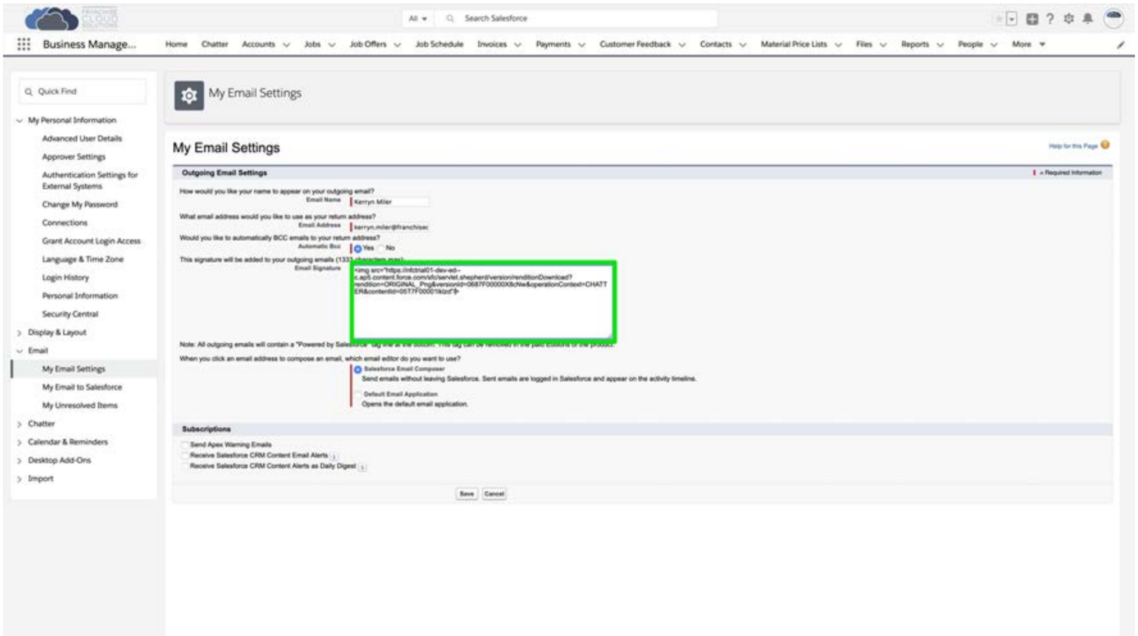
1. Obtain the signature block URL from your system administrator.
2. Go to your personal **Settings**.



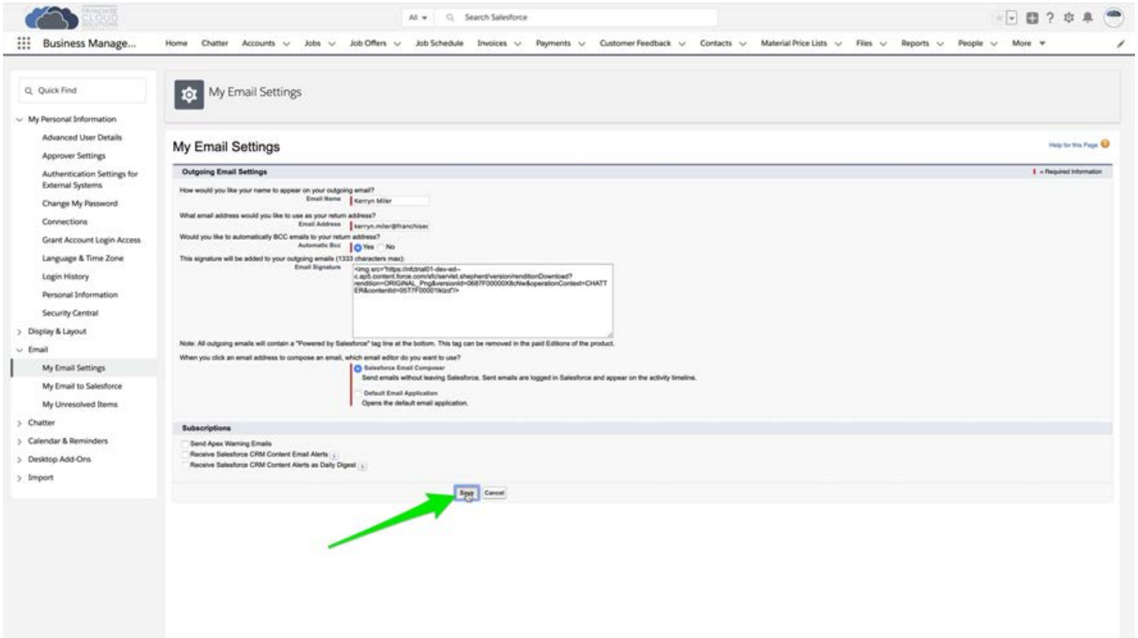
3. Go to **My Email Settings**.



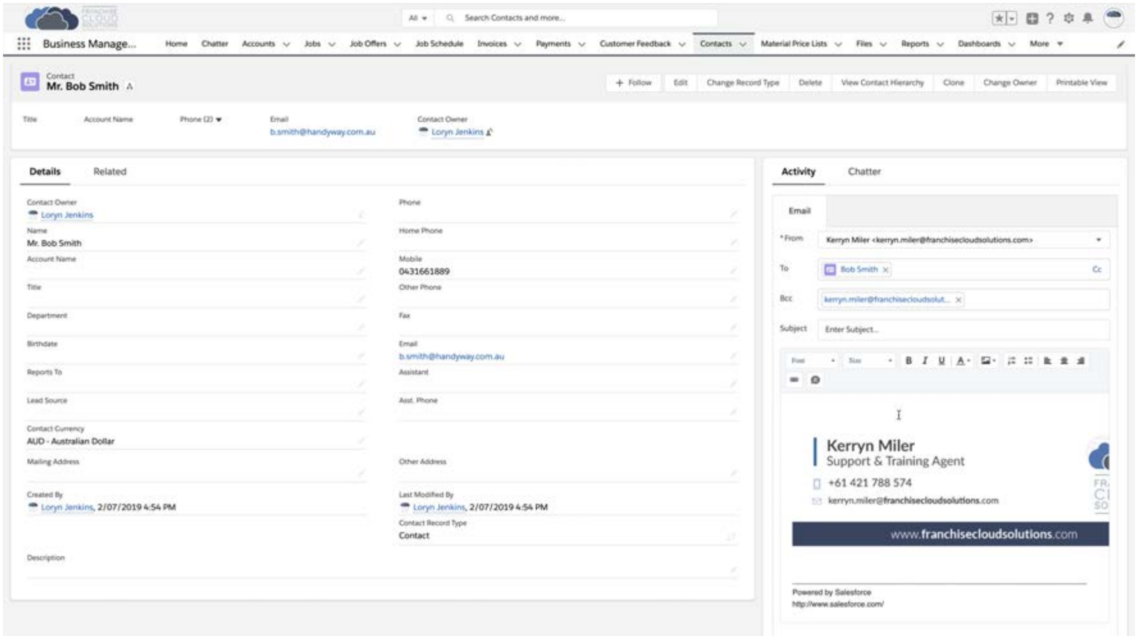
4. Paste the URL provided by your system administrator.



5. Press **Save**.



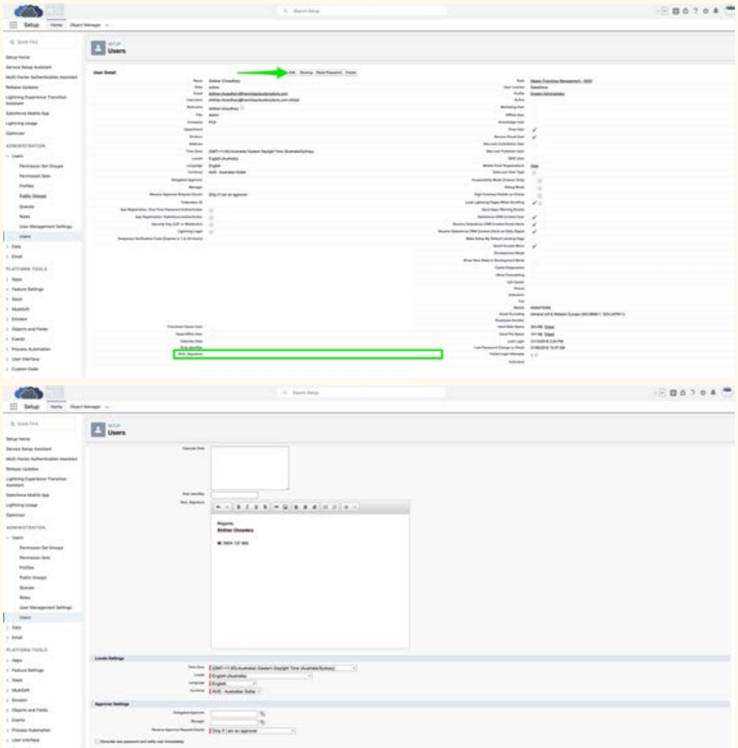
6. The email signature block will now appear within your emails.



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

Rich Text Signatures

System administrators can set up Rich Text Signatures from the User Details record. On pressing Edit, you can construct a rich text email signature consisting of fonts, colors, and images having publicly-accessible URLs.

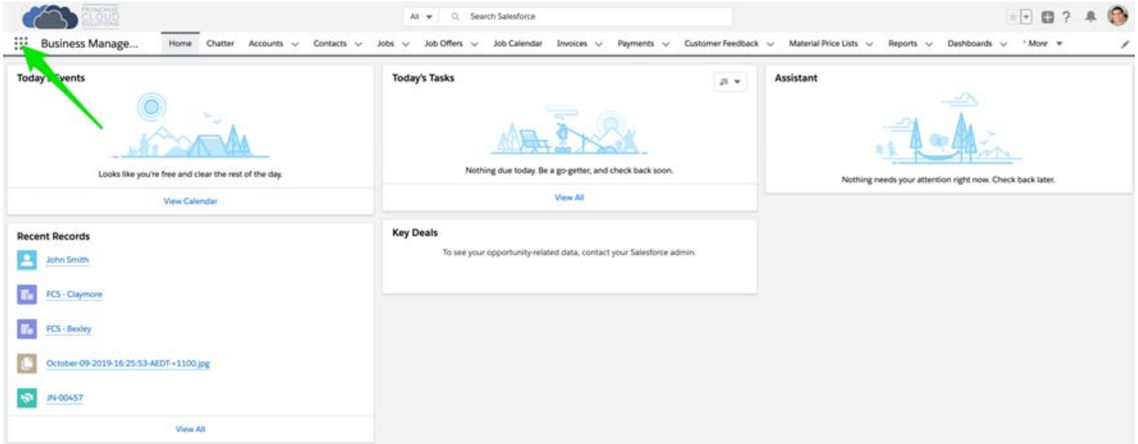


How to review email template headers and footers

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

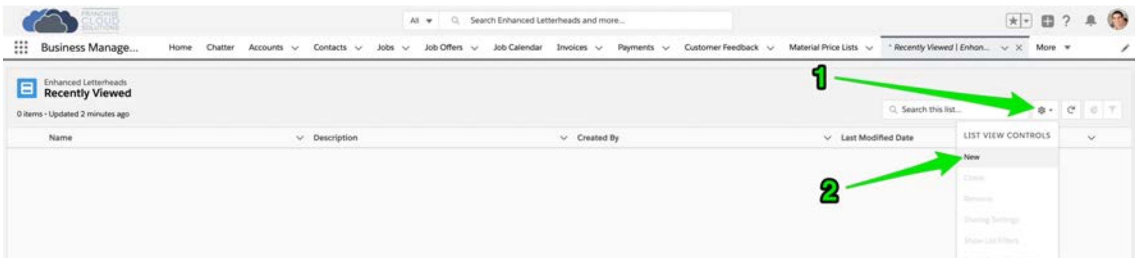
To review the branded email headers and footers

1. Open the **App Launcher**.

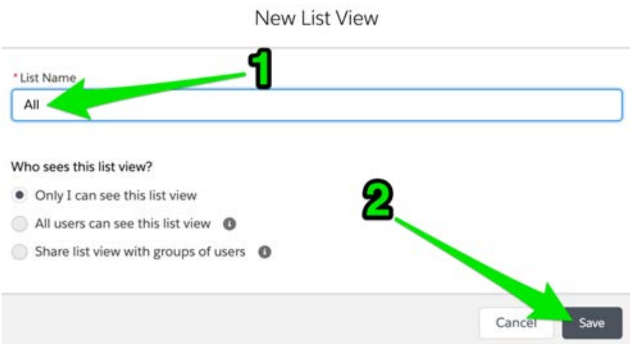


2. In the **App Launcher** `Search` box, enter *`enhanced letterheads`* and select the **Enhanced Letterheads** link.

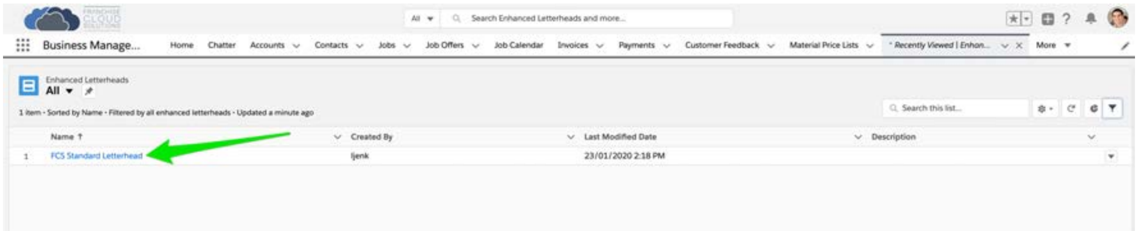
3. You may see an empty **Enhanced Letterheads** list. To see any of the letterheads, create a **New** list view.



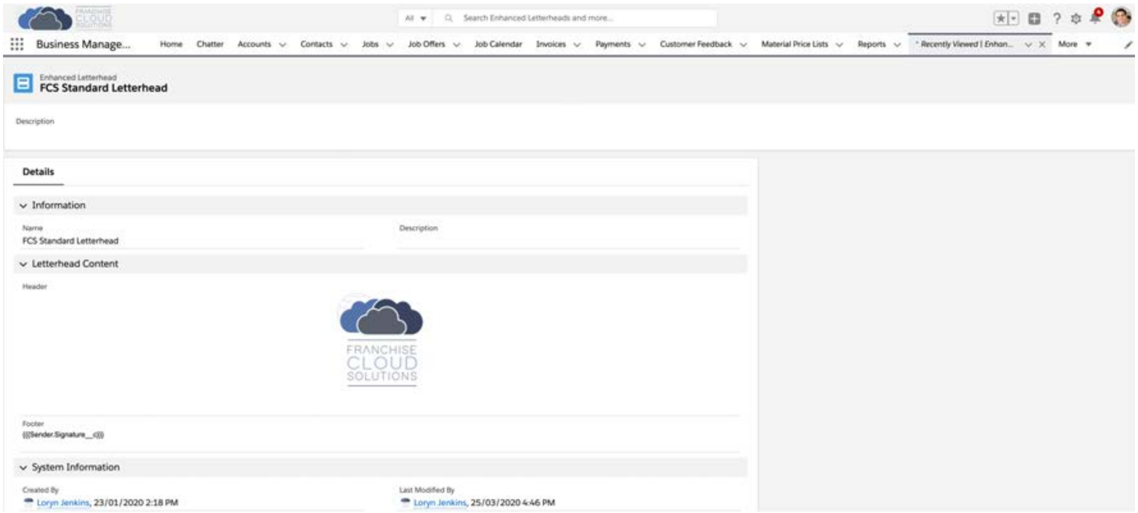
4. Name the list view and press **Save**.



5. Now select the Standard Letterhead.



6. You will be able to view but not edit the Standard Letterhead.



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

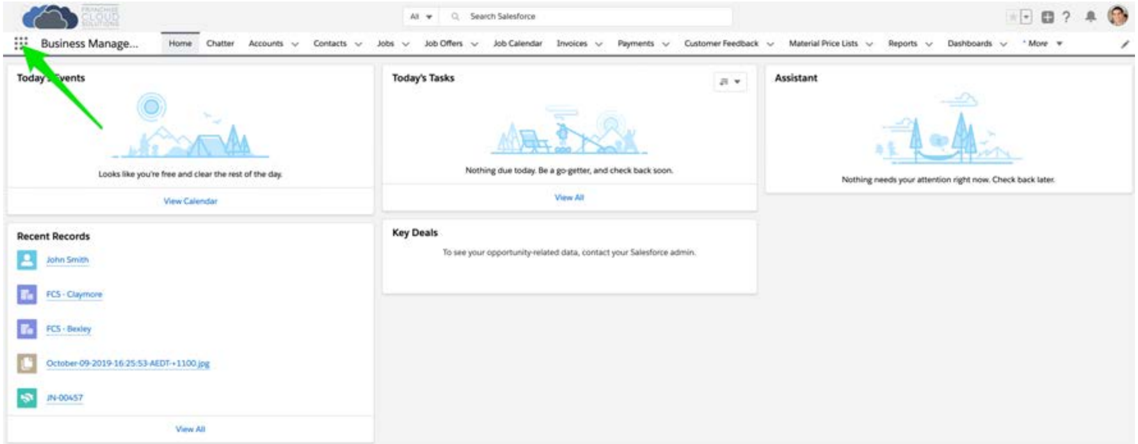
- customized header and footers
- boilerplate text
- variables that draw information from the Job, Account, Contact or Invoice.

Email templates that are frequently created by our clients include

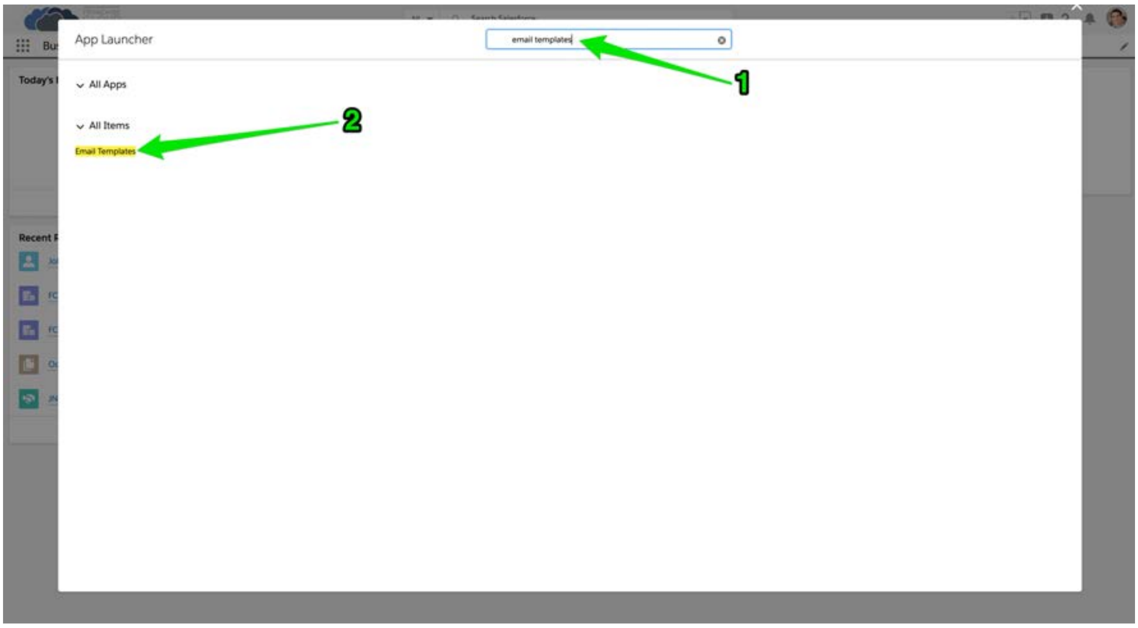
- New customer initial contact
- Returning customer initial contact
- New Quote Job request
- New Do & Charge Job request
- Scheduled appointment notification
- Quote email
- Invoice email
- Invoice overdue

To create a custom email template

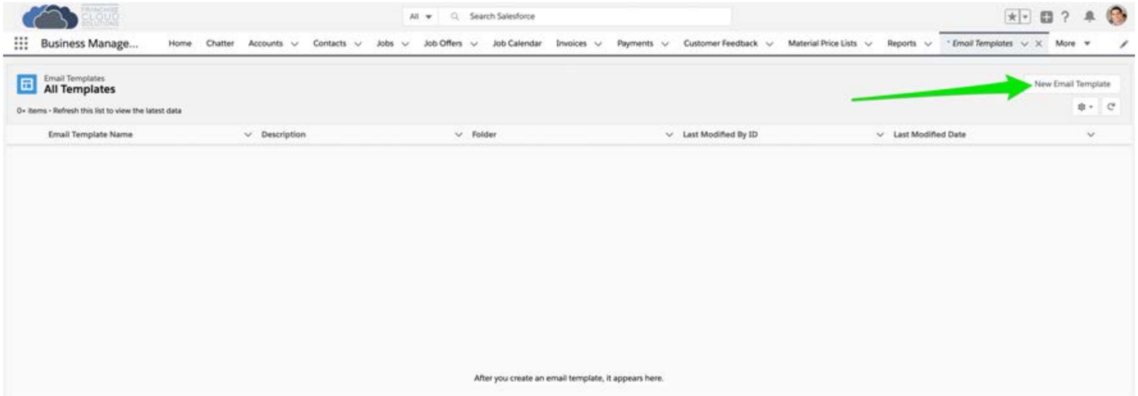
1. Open the **App Launcher**.



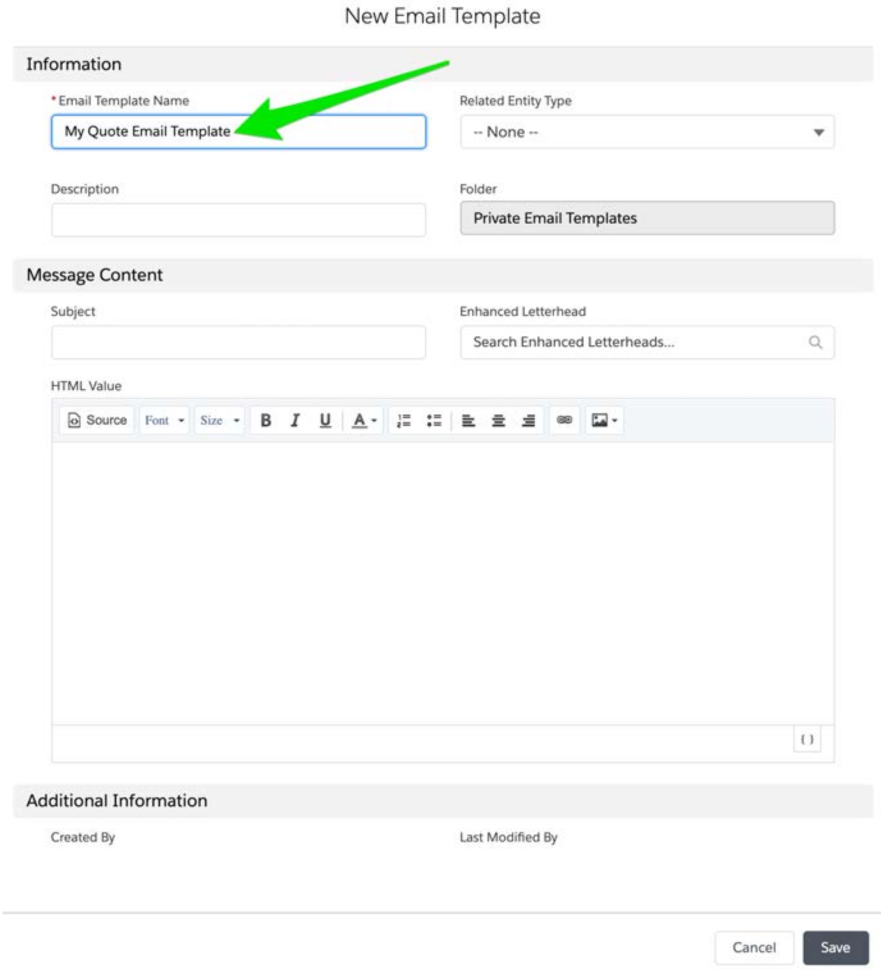
2. In the **App Launcher** `Search` box, enter *`email templates`* and select the **Email Templates** link.



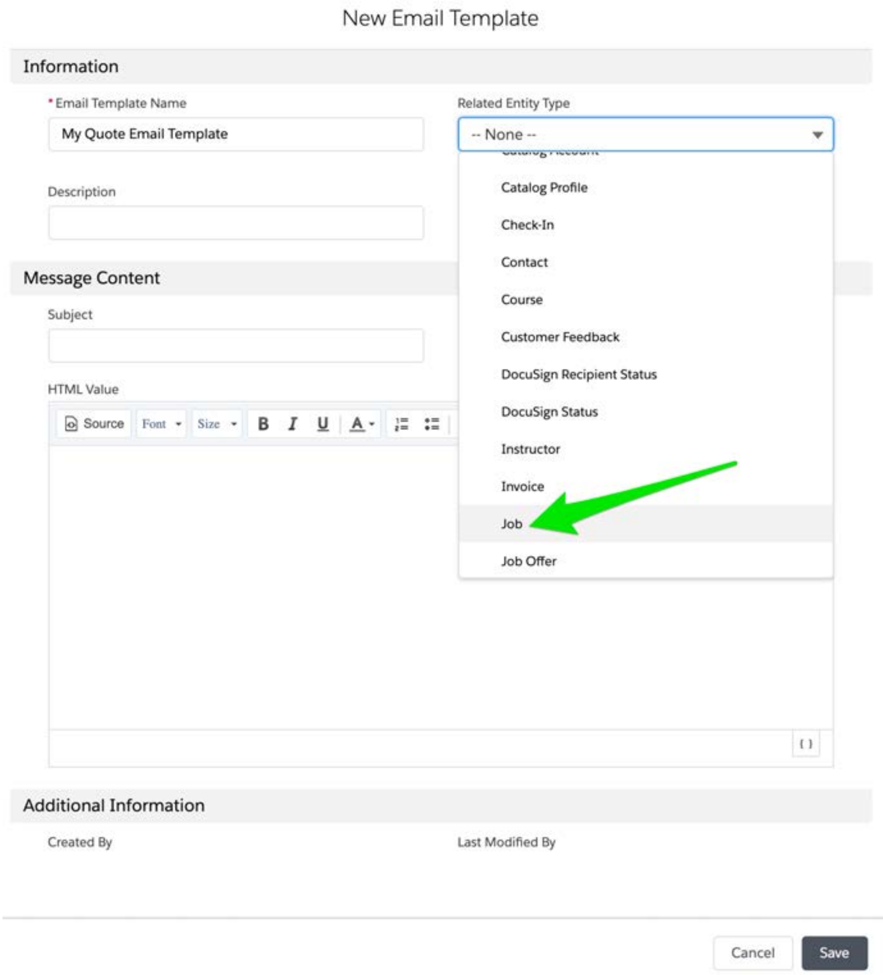
3. You may see an empty **Email Templates** list. Press **New Email Template**.



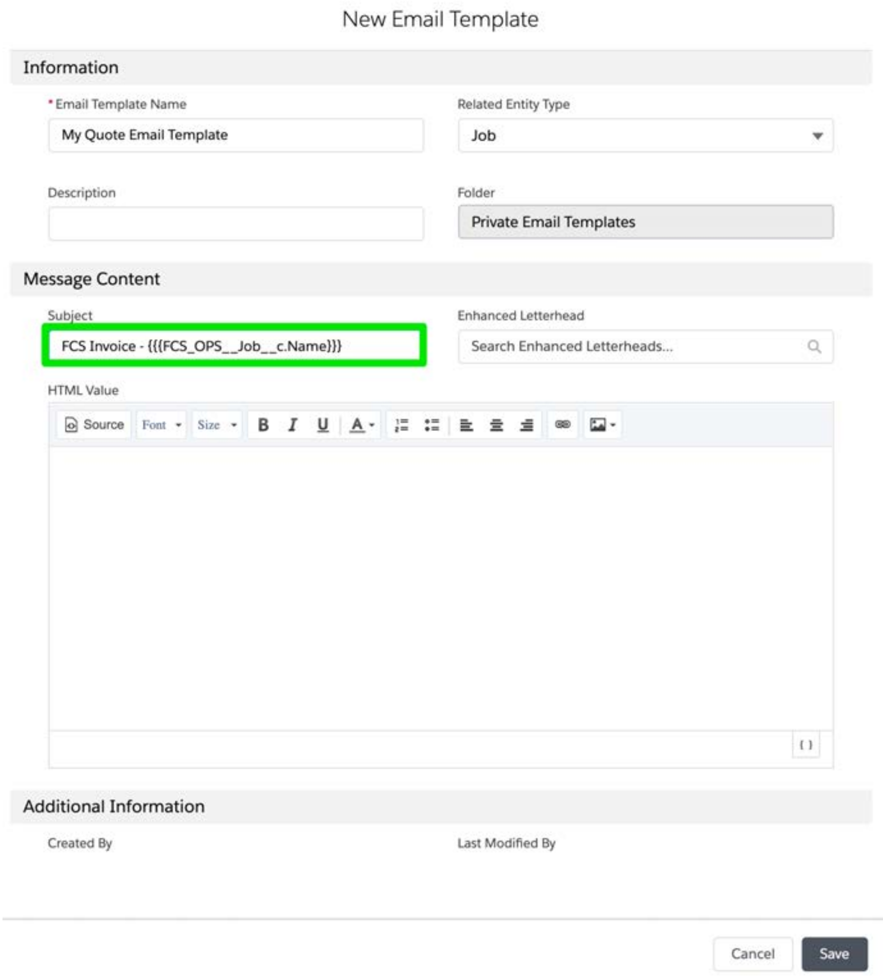
4. Insert an email template name that will help you identify it.



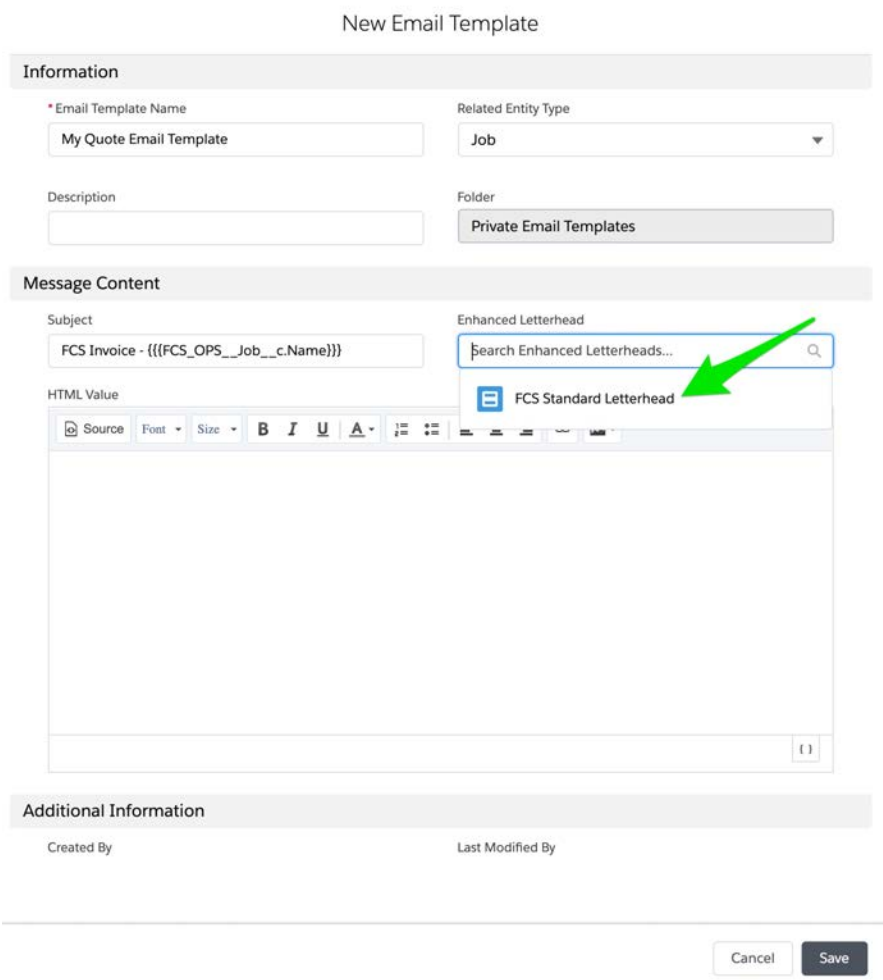
5. If you are going to use merge fields, you must base the email template off a particular entity type. Quotes should be based on Jobs. Invoices should be based on Invoice. The related entity type you choose will determine which fields are available for merging and where this template will be visible within Salesforce.



6. Enter an email subject line.

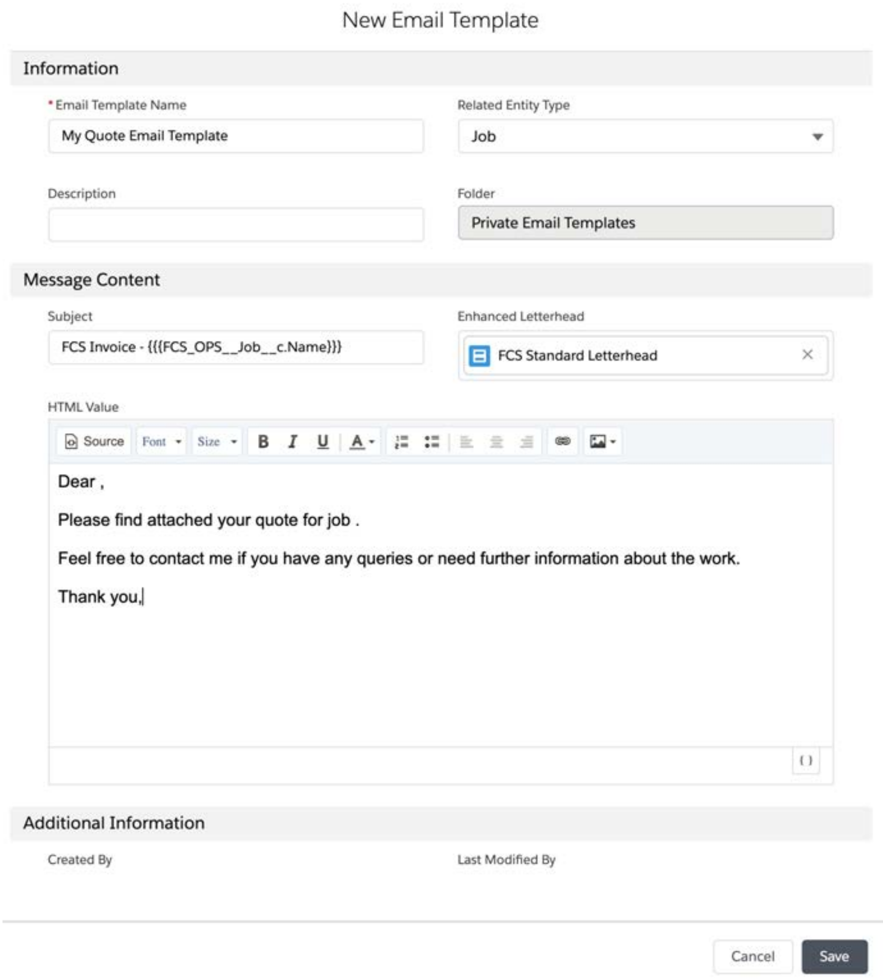


7. Select an appropriate letterhead.

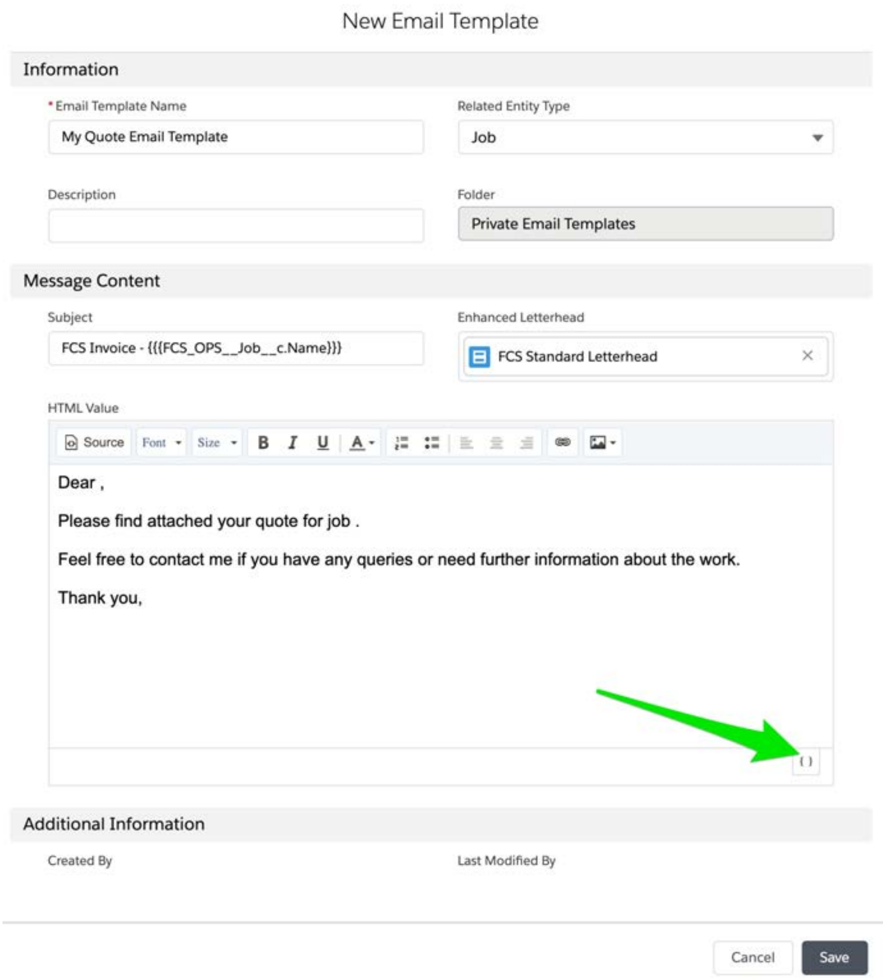


> You can review the available letterheads. *See* “How to review email template headers and footers” on page ccclxxxii.

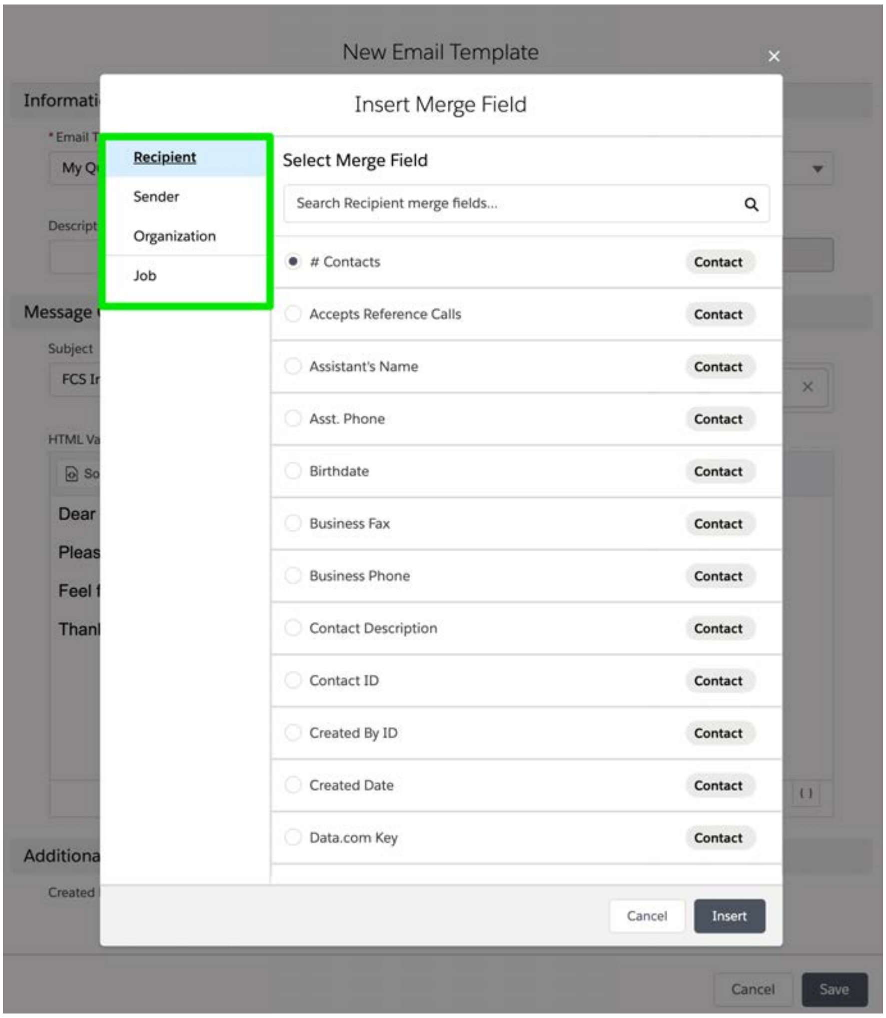
8. Enter boilerplate text into the `HTML Value` field.



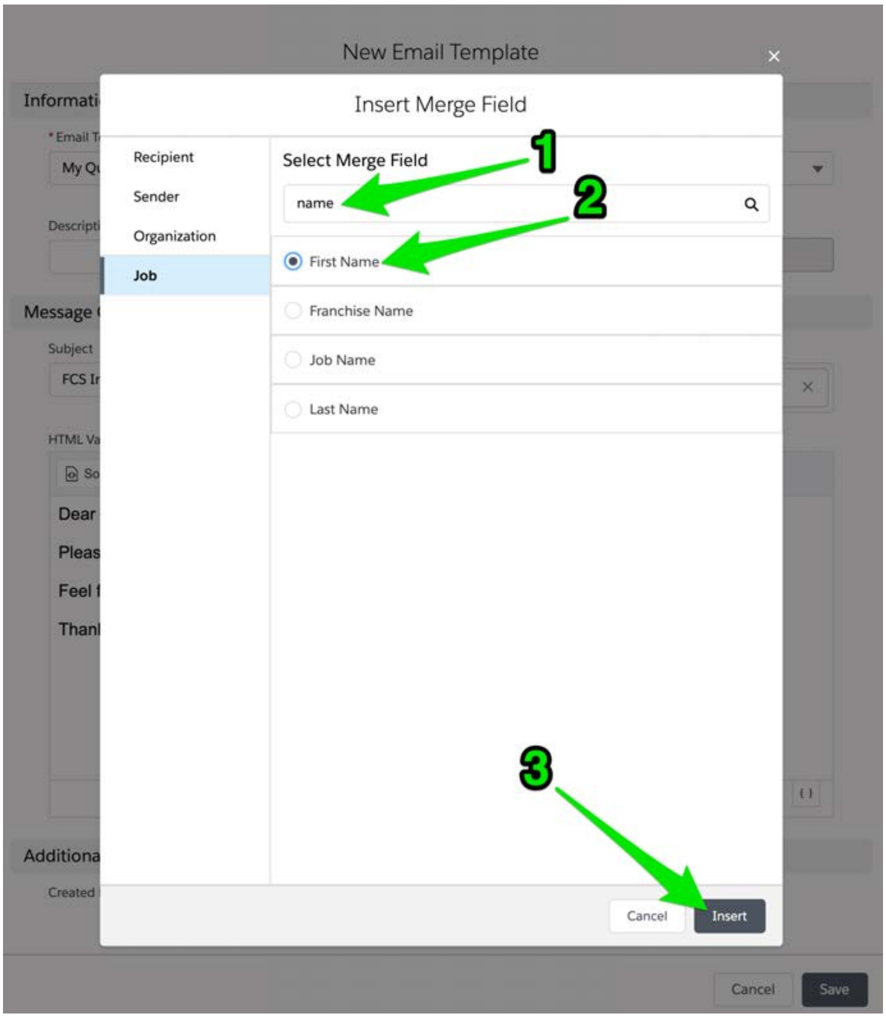
9. To insert variables into the email template body, press the **Insert Merge Field** button (i.e. the brace button { }).



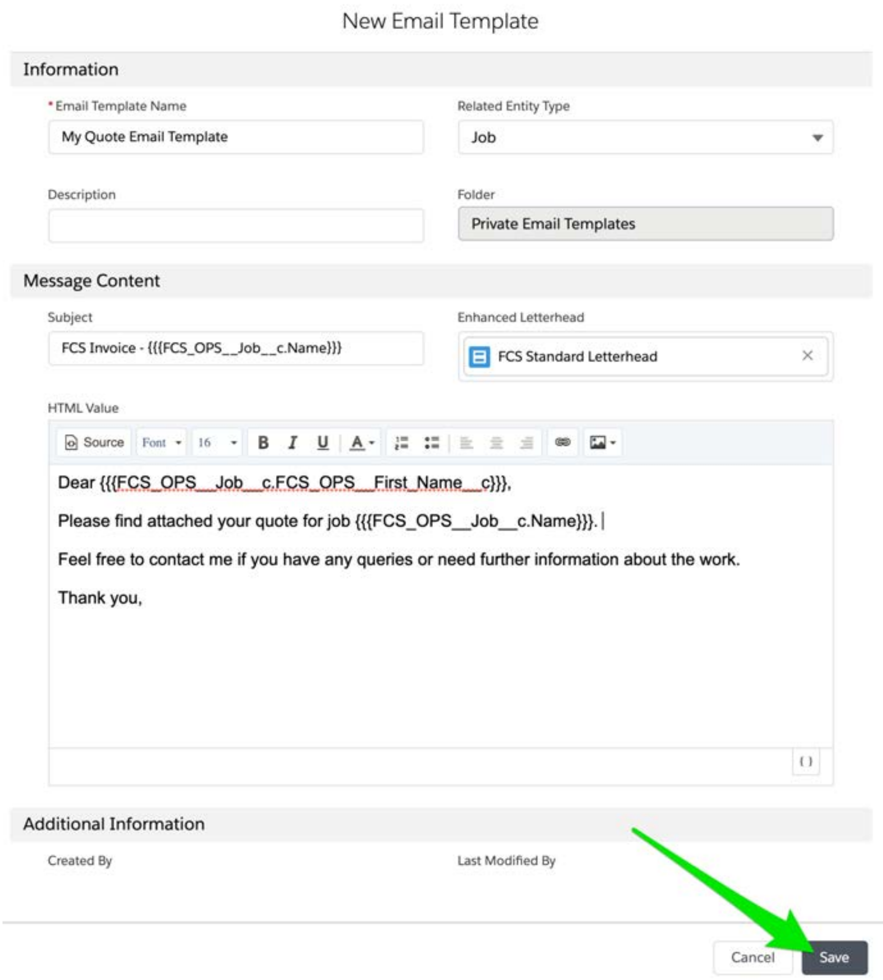
10. Select the Object Reference. Most of the time you will be referring to the Job or Invoice. Sometimes you might reference yourself (Sender) or your organization (Organization).



11. Now search for and then select the appropriate Merge Field. Press **Insert** when complete.



12. Enter as many merge fields as are appropriate to your template. Press **Save** when the template is complete.



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

Tips

- To insert a merge field into a subject line, press the Insert Merge Field button (i.e. the brace button { }) attached to the HTML Value field. Once the variable is inserted into the HTML Value field, you can copy and paste it into the Subject line.
- To allow the template to display the user's own signature block, select one of the following merge fields:
  - {{{Sender.Signature}}}
  - {{{Sender.Rich_Signature__c}}}
- To ensure the font appearing in your email is controlled by the template (and not by the user's own browser settings) specify a suitable HTML format and enter it into the editor while in HTML source mode. The following provides a reasonable example of how to ensure the HTML styling and not the browser font settings determine the look of the text.

```
<html style="overflow-y: hidden;">
<head>
      <title></title>
</head>
<body style="height: auto; min-height: auto;">
<div style="text-align: left;"><span style="font-size:14px;"><span style="font-family:Helvetica,Arial,sans-serif;">Dear {{{Recipient.FirstName}}},<br />
<br />
First para goes here.<br />
<br />
<u><strong>Bolded Heading</strong></u><br />
Next para goes here.<br />
<br />
{{{Sender.Rich_Email_Signature__c}}}</span></span></div>
</body>
</html>
```

How to create a Quote email template

When you are using the Nextdoc for document generation, you need to use an email template for any Quotes you send to customers. You can use the standard Quote email template or you can create your own custom Quote email template.

To create a custom quote email template

1. Follow the instructions in "How to create a custom email template" on page 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.

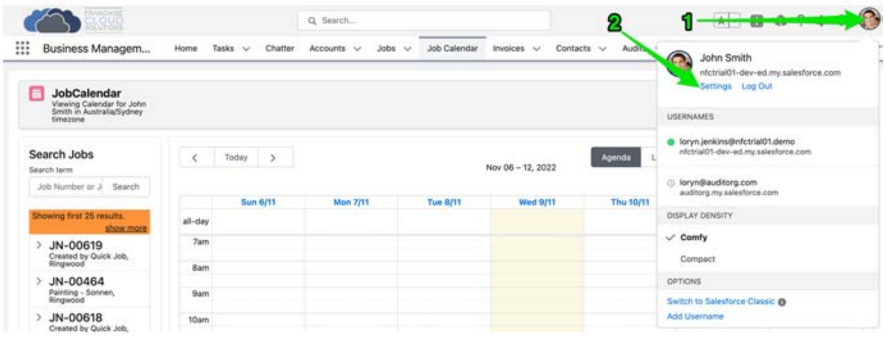
- "Installing the Salesforce extension for Office 365" on the next page
- "Installing the Chrome Salesforce extension for GSuite" on page cdvii
- "Logging email using Salesforce extensions" on page cdxi
- "Logging events using Salesforce extensions" on page cdxiii

How to send all emails to my inbox

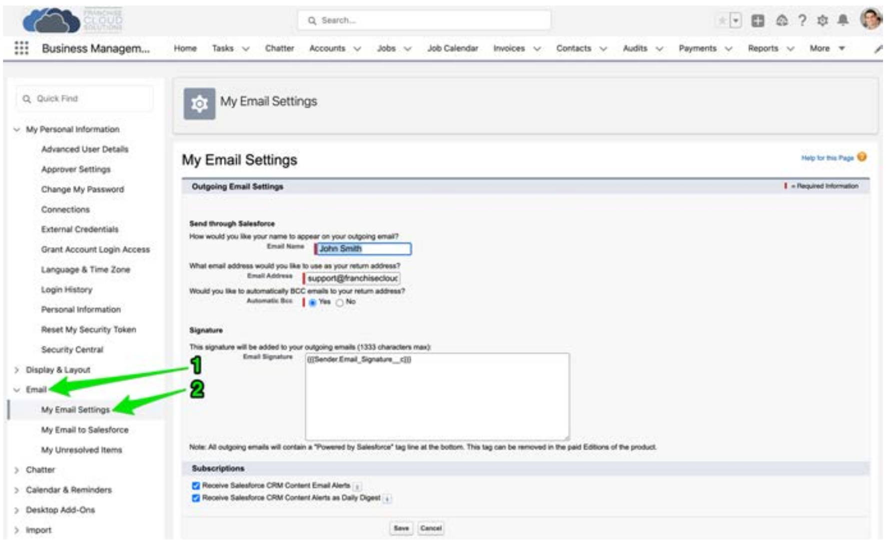
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

To blind copy all emails to your email address

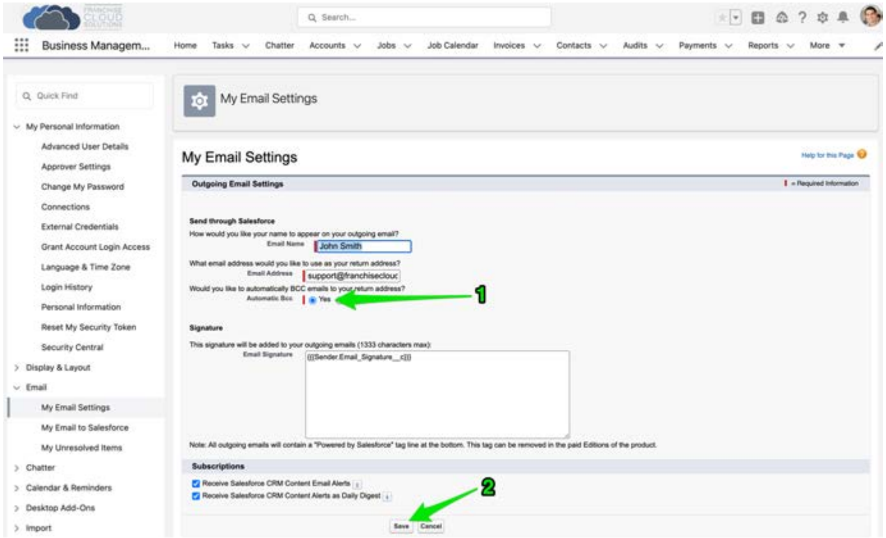
1. Go to **View Profile** and choose **Settings**.



2. Open the **Email** option and choose **My Email Settings**.



3. Set `Automatic Bcc` to *Yes*, then press **Save**.



> If you need to send a copy of your email to an address that is not yours, follow the above procedure and then set up a forwarding rule within your personal email to forward to the secondary address.

Granting EAC sync permission

If your system administrator has enabled Einstein Activity Capture (EAC) sync for your profile, you must personally agree to using EAC. Salesforce will ask for your agreement to use EAC by displaying a banner at the top of the Salesforce page.

> Before you agree, you should understand whether your administrator
> - is syncing emails, events, and contacts, or
> - is syncing events and contacts only

> If you agree to using EAC, you can choose whether captured records are visible to
> - only you, or
> - a defined group of users (i.e. users who belong to specific groups), or
> - everyone who can view the records you have access to

Installing the Salesforce extension for Office 365

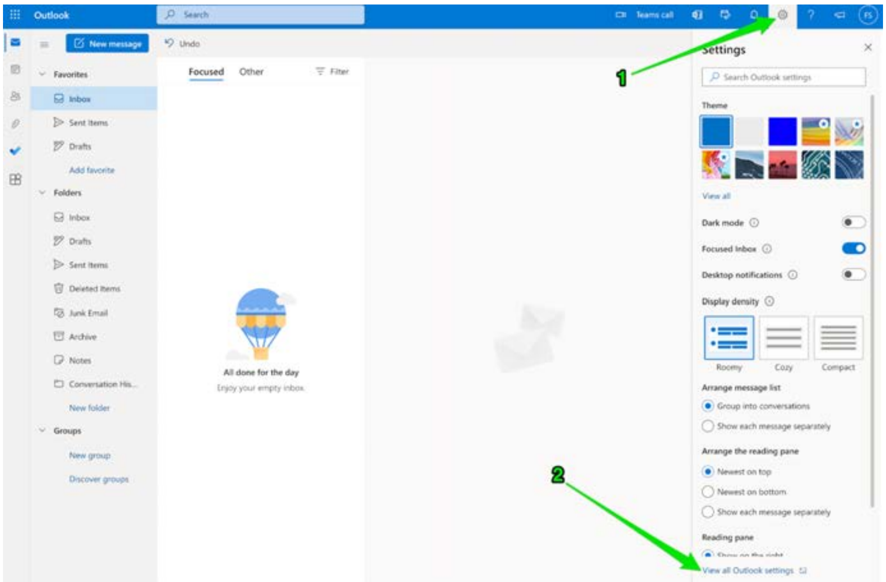
The Salesforce extension for Office 365 provides you control as to

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

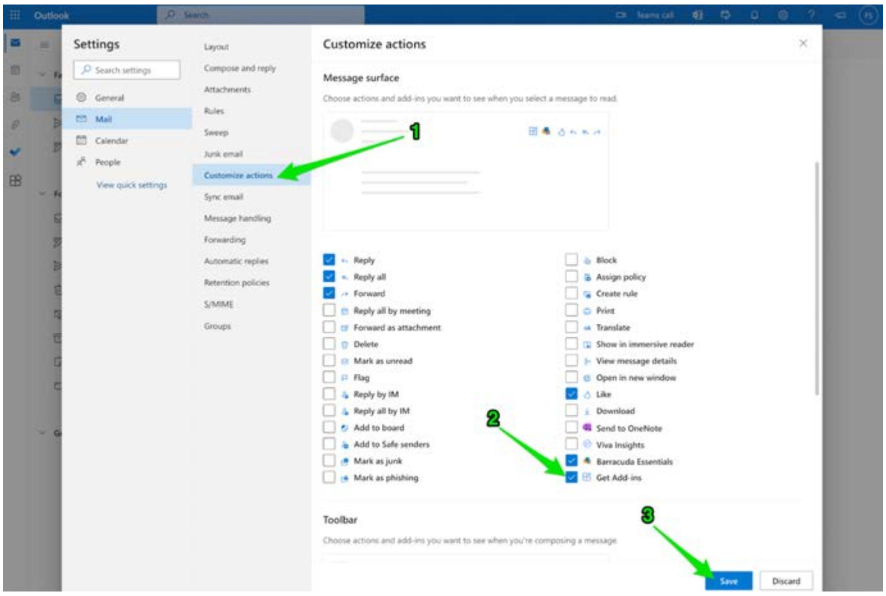
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

To install the Salesforce extension for Office 365

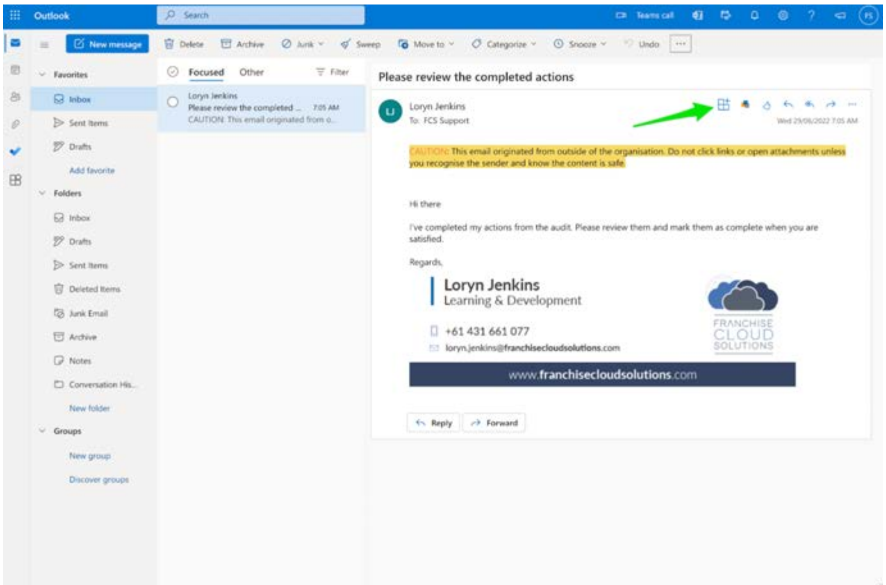
1. From **Outlook 365**, select the **Settings** menu and choose to **View all Outlook Settings**.



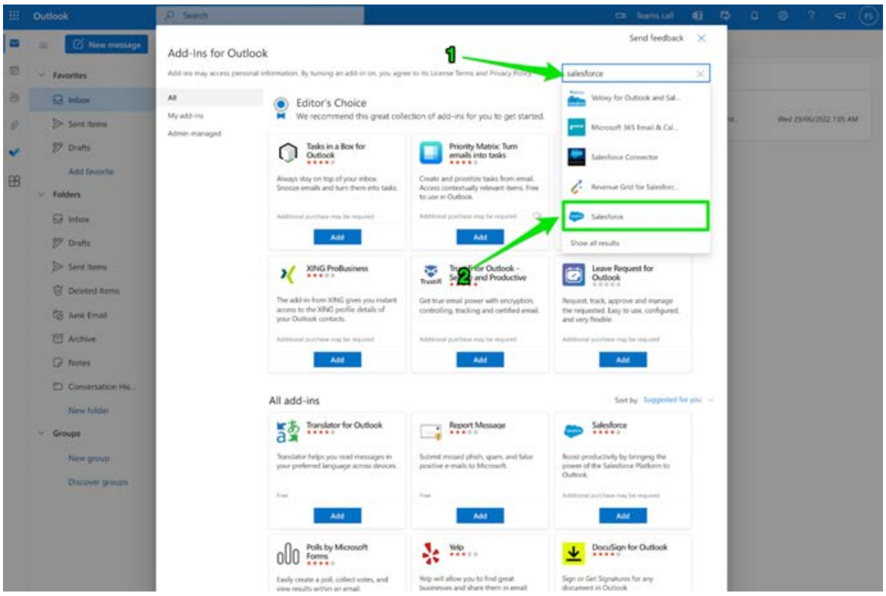
2. Choose **Customize Actions**, scroll to the section named **Message Surface**. Check **Get Add-ins** and press **Save**.



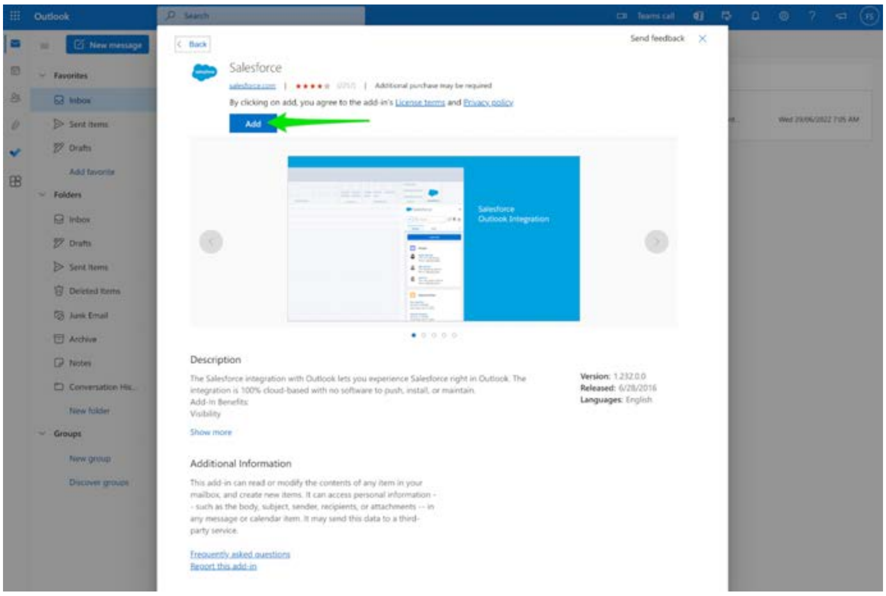
3. Within any message, click the **Get Add-ins** button.



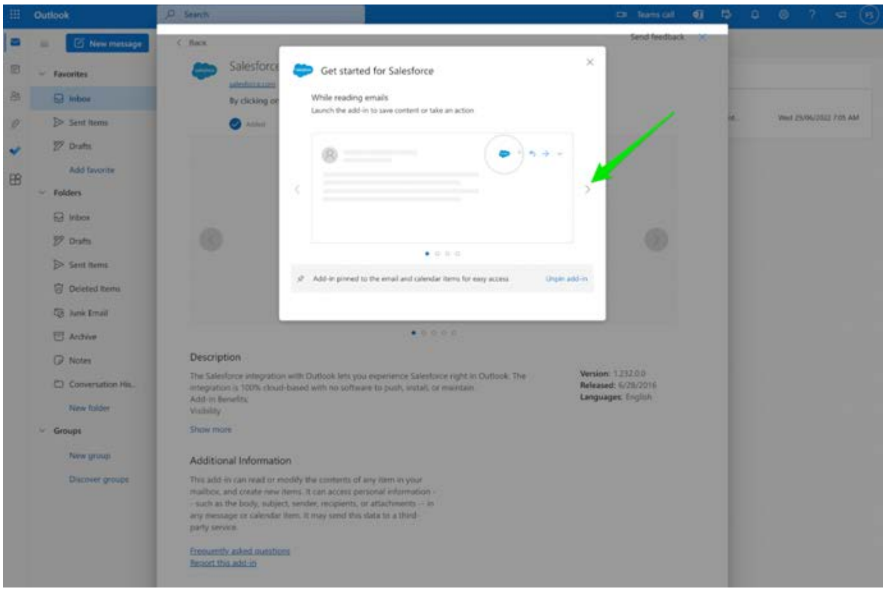
4. Within the Add-ins for Outlook box, search for `Salesforce`. A number of different salesforce add-ins will appear. Select the one shown in the following image or choose **Show all results**.



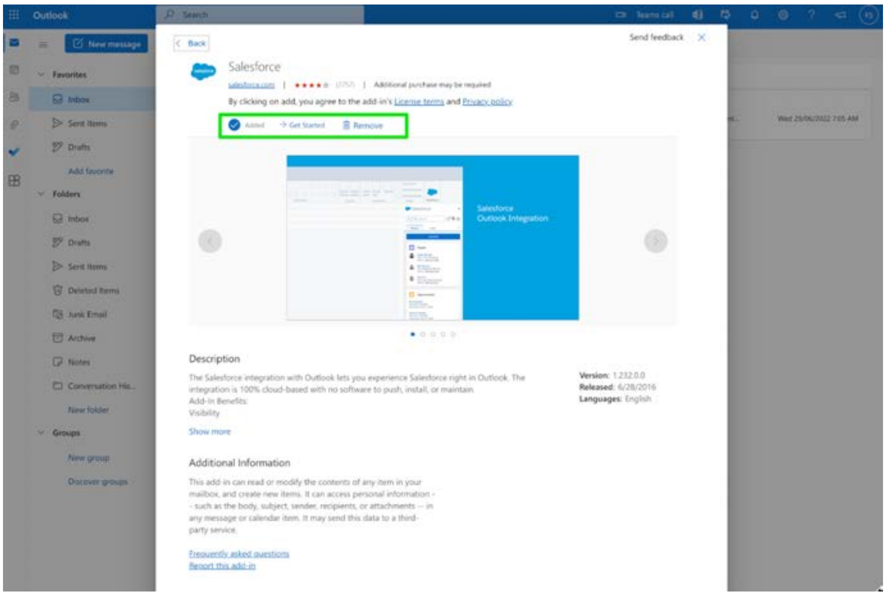
5. From the **Salesforce Connector** page, press the **Add** button.



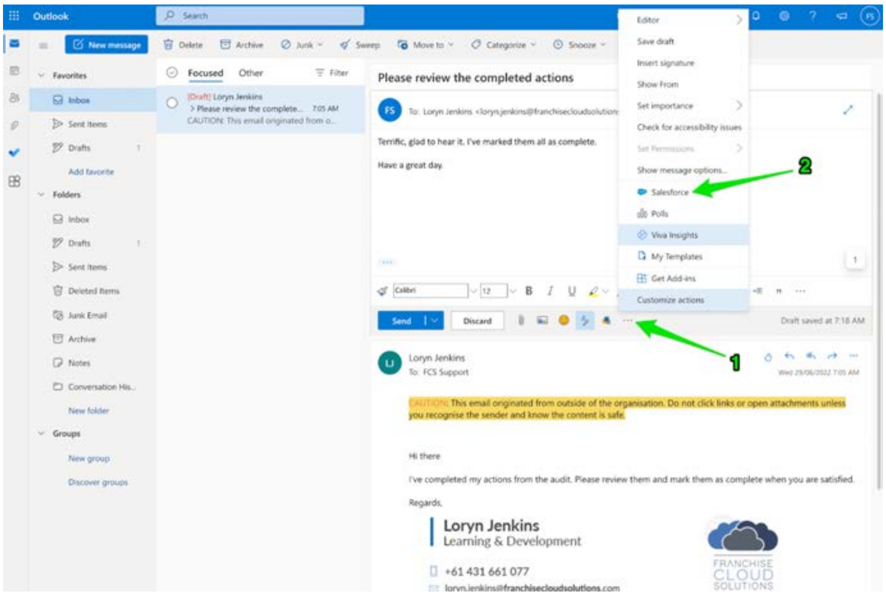
6. We recommend you browse through each of the instructions in the **Get started for Salesforce** box, so you know where to find it and how to use it.



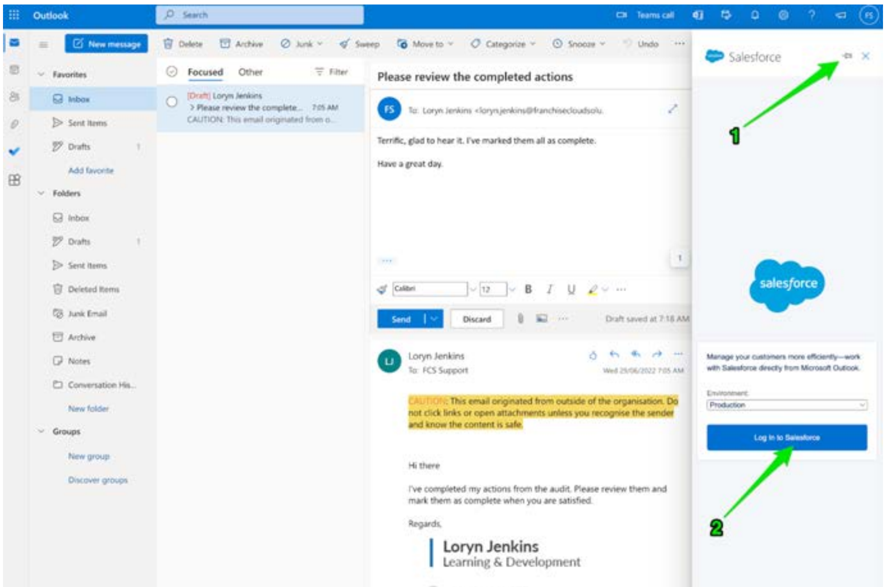
7. Dismiss the **Get started for Salesforce** box and note that the add-in has been added.



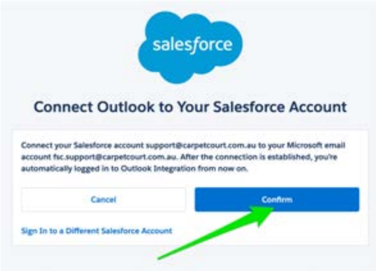
8. Now when you're in any message you're composing, on the **Send** bar, press the **…** button to reveal the menu. Select the **Salesforce** add-in.



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

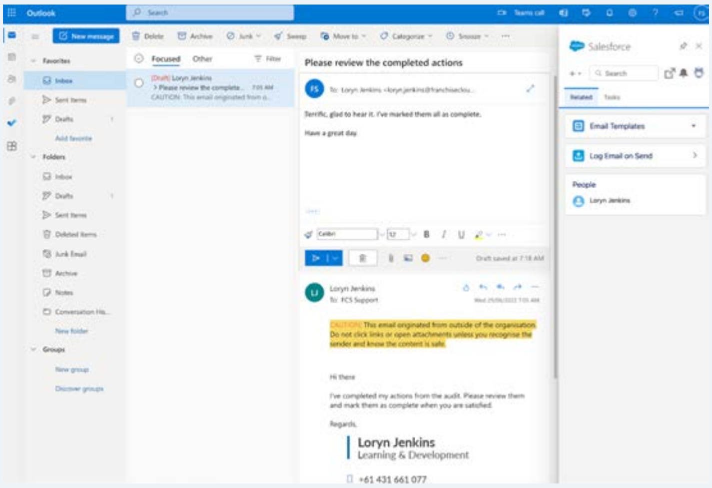


10. At the login prompt, enter your Salesforce **Username** and **Password**. Once logged in, ensure you **Allow** the connection between **Outlook** and your **Salesforce** account.



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

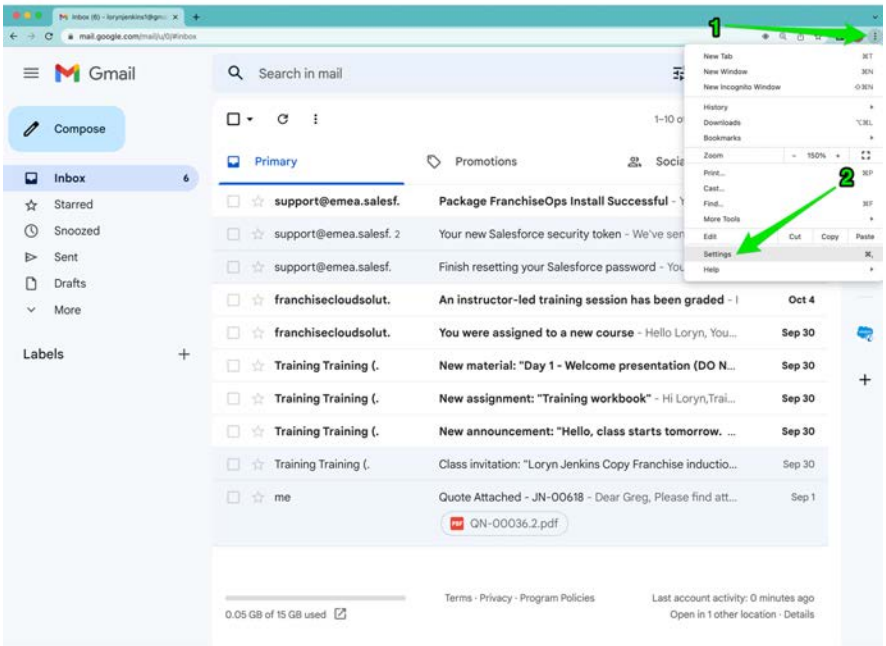
The Salesforce extension for Chrome provides you control as to

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

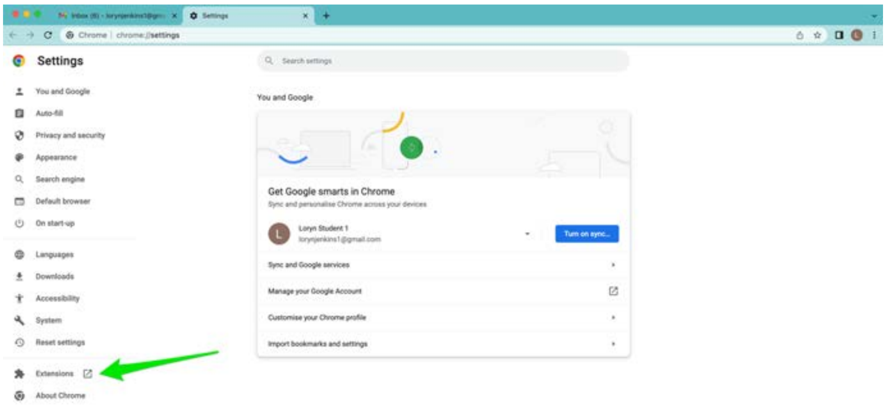
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

To install the Salesforce extension for GSuite

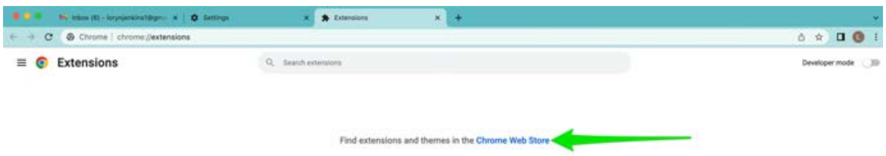
1. Using the **Chrome** browser, open **GMail**. Select the **Customize** ⋮ menu, and choose **Settings**.



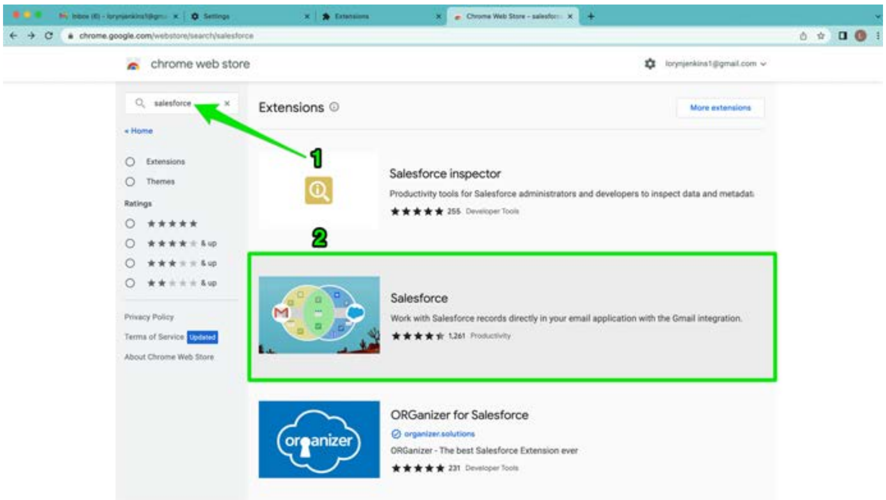
2. Chrome opens a tab in which it displays the **Settings** menu. Select the **Extensions** link.



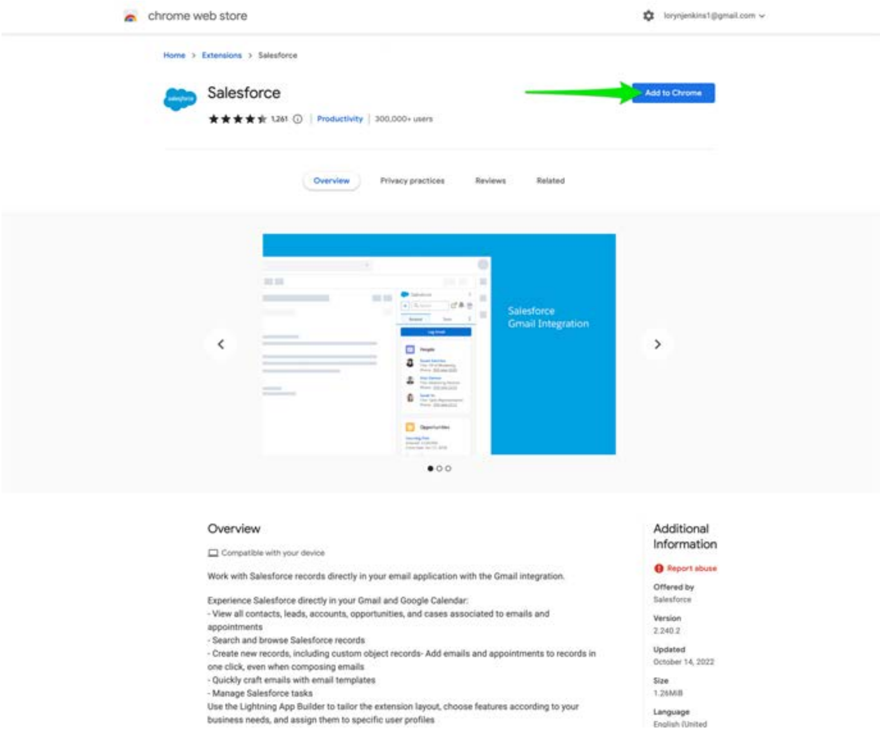
3. **Extensions** opens in yet another tab. Select the link to the **Chrome Web Store**.



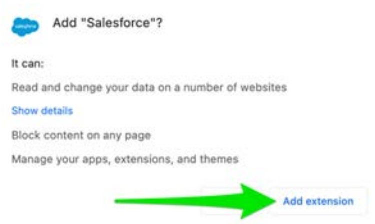
4. A fourth tab opens and displays the **Chrome Web Store**. In the search box, search for `Salesforce`. Select the **Salesforce** extension.



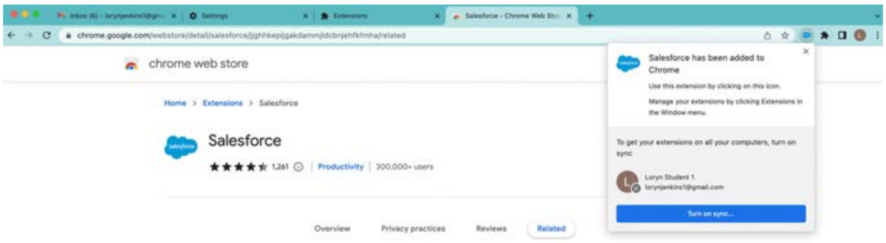
5. From the **Salesforce** entry, select the **Add to Chrome** button.



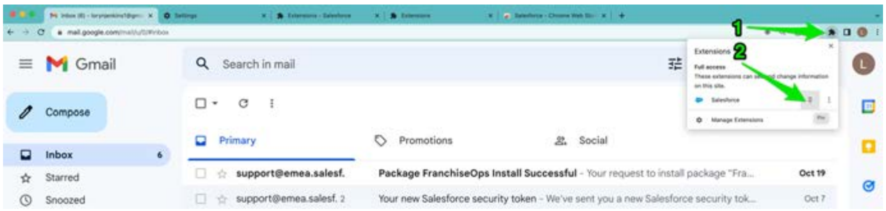
6. From the **Add "Salesforce"** box, select **Add Extension**.



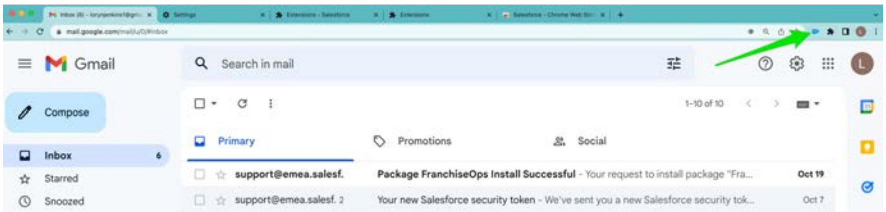
7. Salesforce adds the extension to Chrome then provides a popup to confirm that the extension has been added.



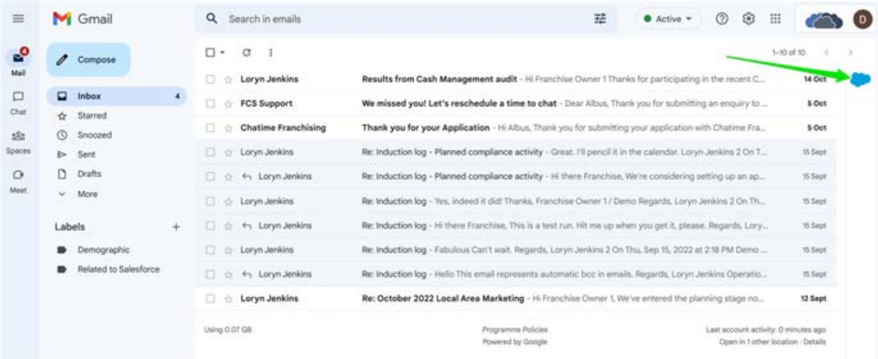
8. Now go back to the tab containing **GMail** and click on the Extensions button, then click the **Pin** button beside the Salesforce label.

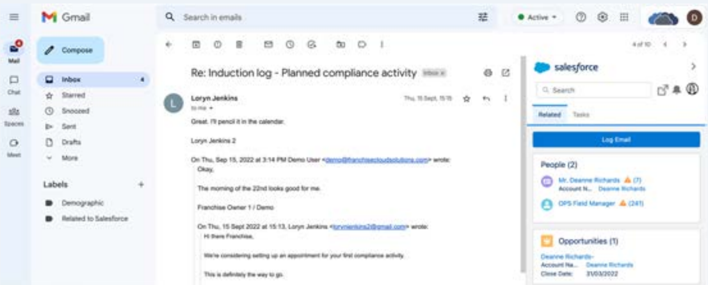


9. On pinning the **Salesforce** extension, the **Salesforce** button becomes visible in the Chrome extensions tray. Click the **Salesforce** button to show the **Salesforce** pane.



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.
>
> 
>

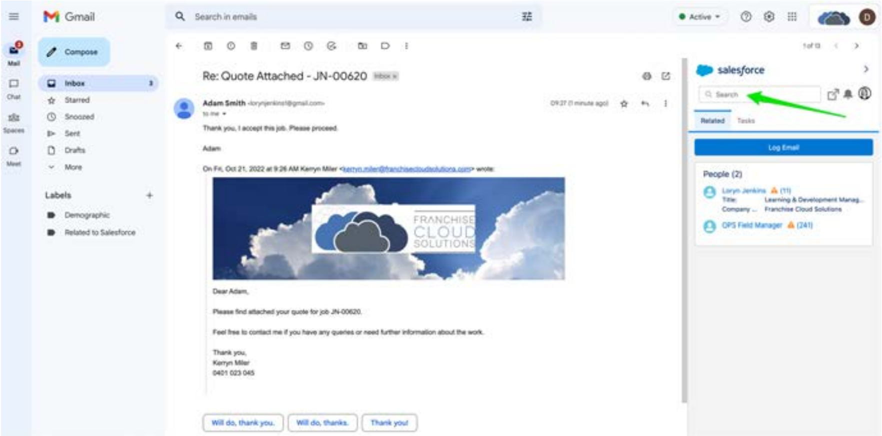
Logging email using Salesforce extensions

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.

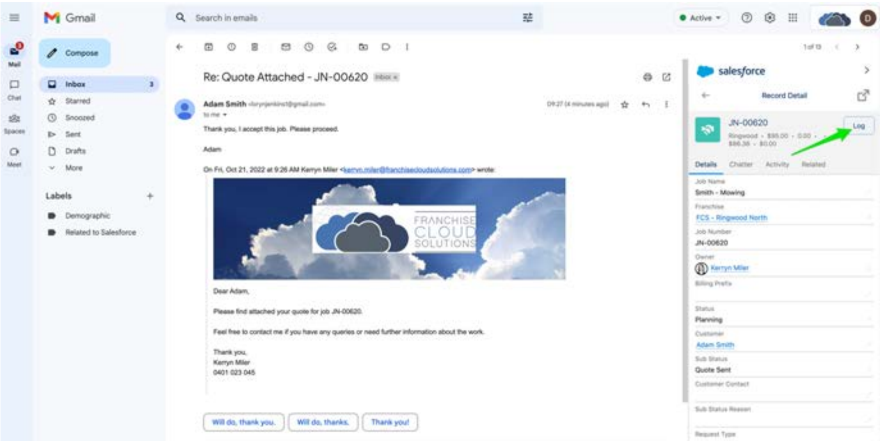
> All screen shots below show the Chrome extension. The extension for Office 365 is used similarly.

To log an email against a job (or account)

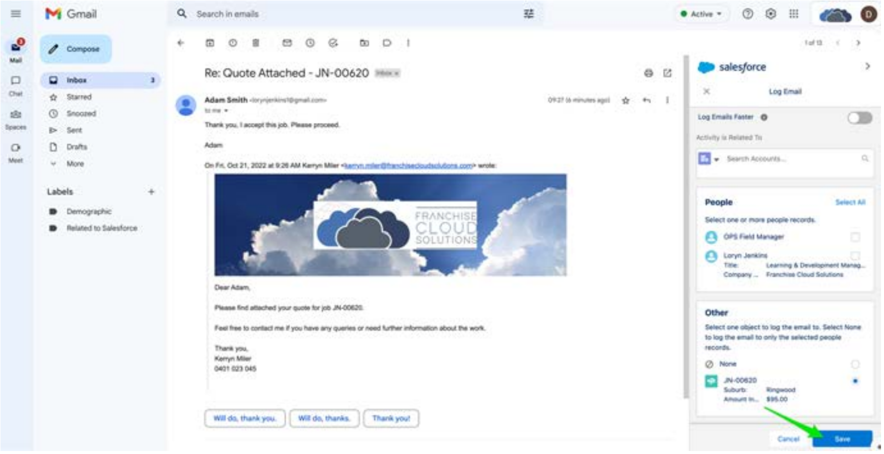
1. With your email open and the Salesforce pane opened, search for the **Job** record in the search field.

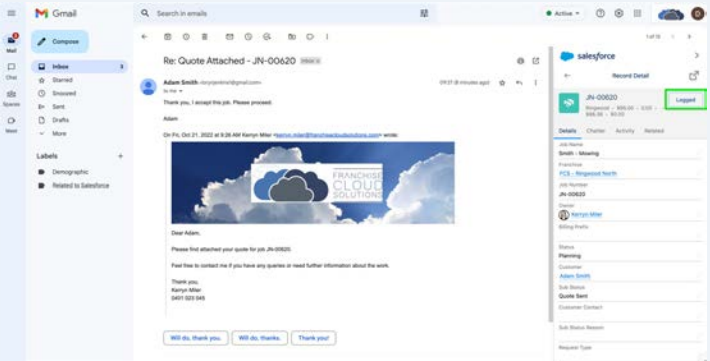


2. The system will display the **Job** record. When you're satisfied it is the right record, press **Log**.



3. Press **Save**.



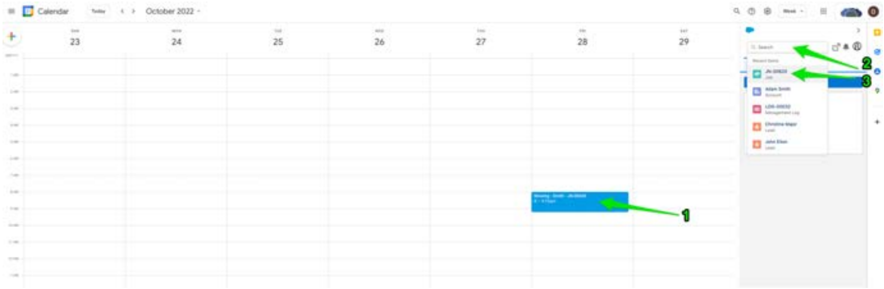
> **Congratulations**
>
> The record is now logged against the selected Salesforce record. You can find the email in the record's Activity History.
>
> 

Logging events using Salesforce extensions

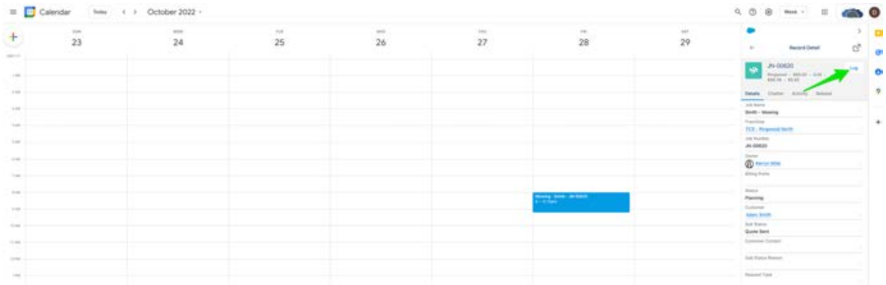
If automatic event syncing is not configured from your personal calendar back to the Salesforce calendar (check with your system administrator) you may still be able to manually log events using the Salesforce extension.

To log an event to a Salesforce record

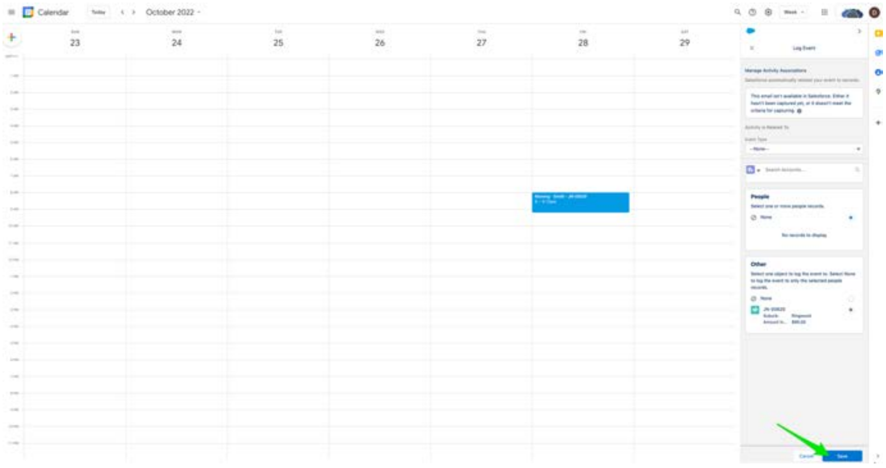
1. In your personal calendar select the event, then search for the appropriate record within the Salesforce search pane.



2. With the correct record in view, press the **Log** button.

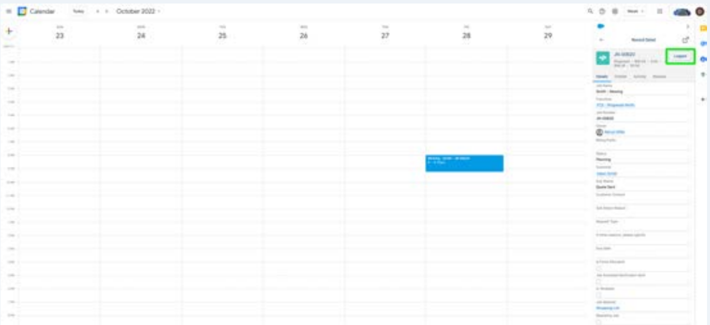


3. Now press **Save**.



Congratulations

The event is logged to Salesforce.



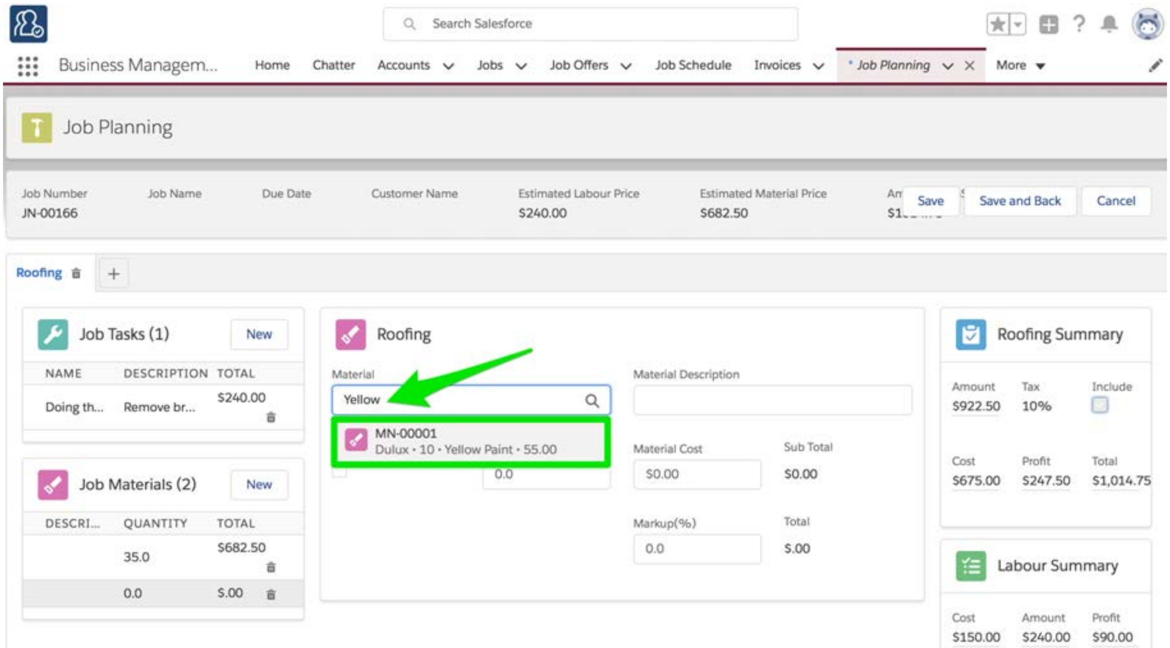
CHAPTER 12

Working with Material Price Lists

Understanding material price lists

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.



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.

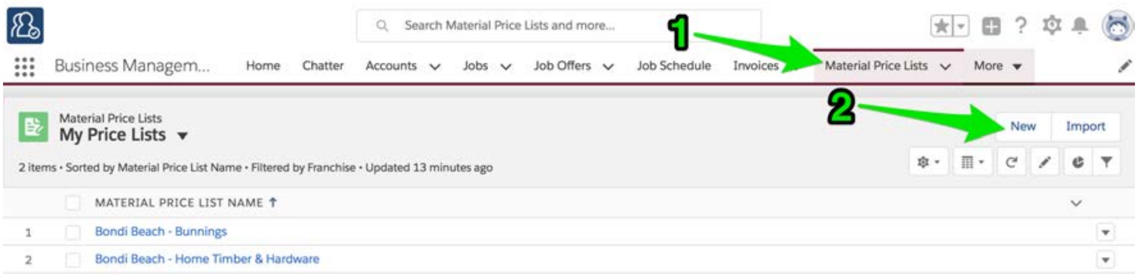
Creating a material price list

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.

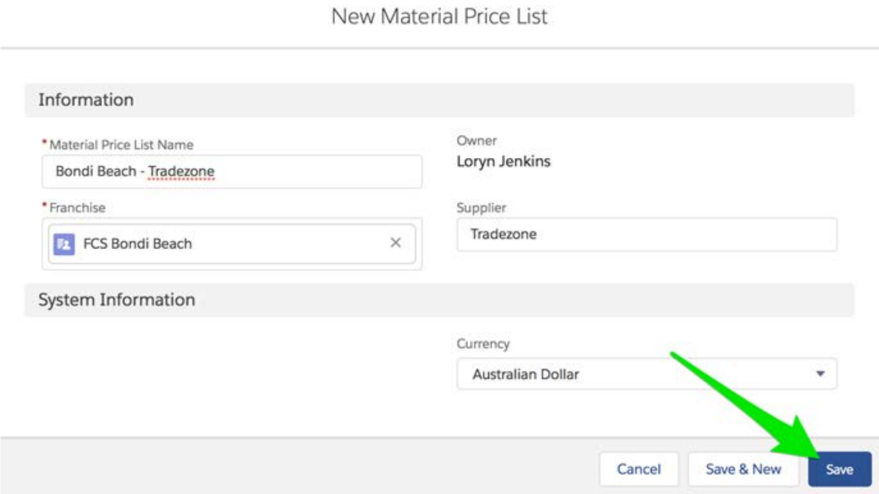
To create a price list

1. From the **Material Price Lists** tab, press **New**.

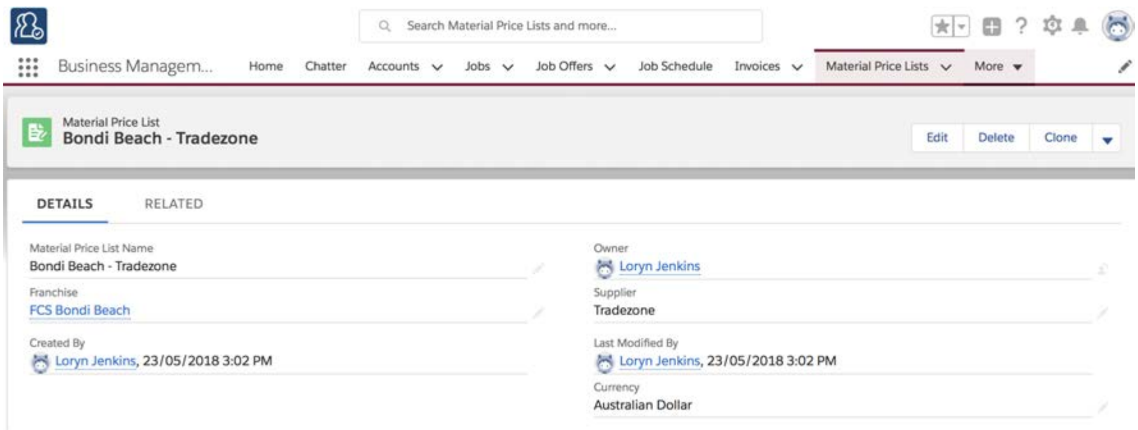


The **New Material Price** list dialog box displays.

2. Enter the `Material Price List Name`, the `Franchise`, and the `Supplier`, then press **Save**.



The new price list displays.



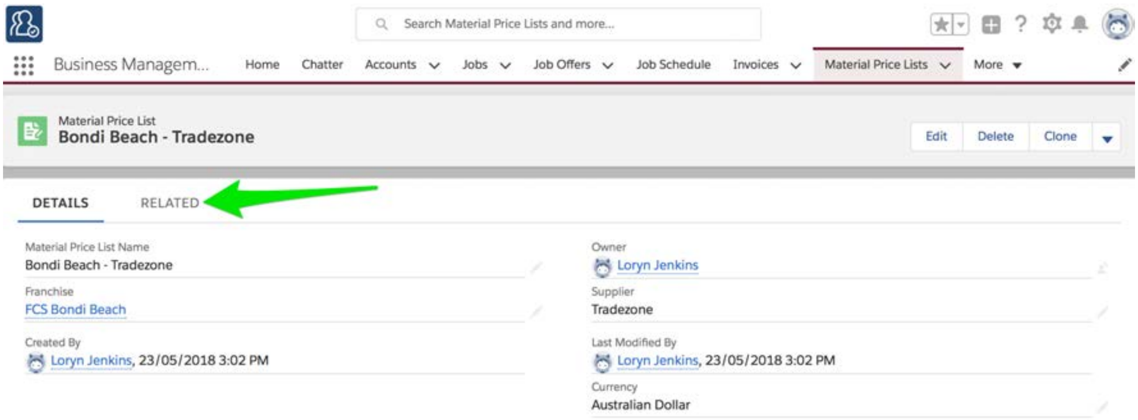
Adding a material

Once you have created a price list, you will want to add the most commonly purchased items from that supplier to the price list.

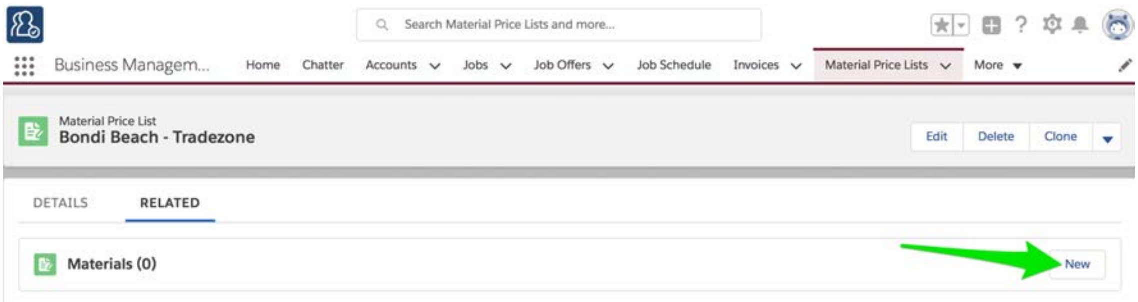
> Infrequently used items can be added when they are first used. You can add any item as needed while creating a Job Plan. *See* "How to add a new material to a price list" on page cxlviii.

To add a material to a price list

1. From the **Material Price List**, select the **Related** tab.

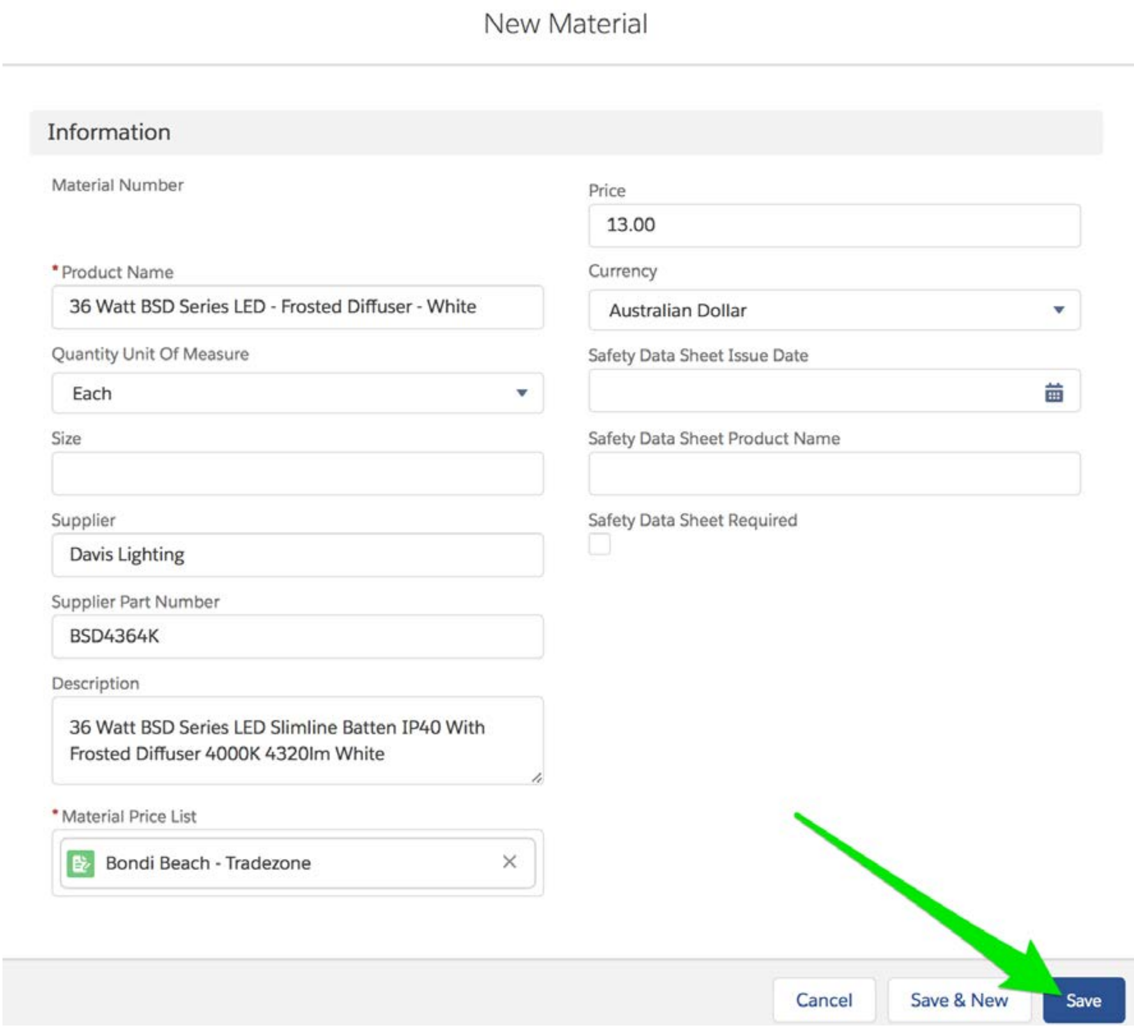


2. From the **Materials** section, press **New**.

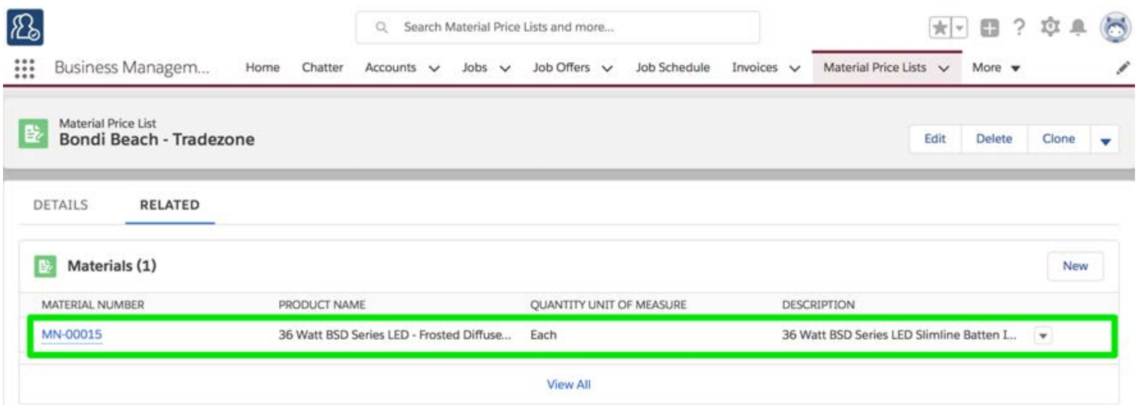


The **New Material** dialog box displays.

3. Enter all the relevant material details.



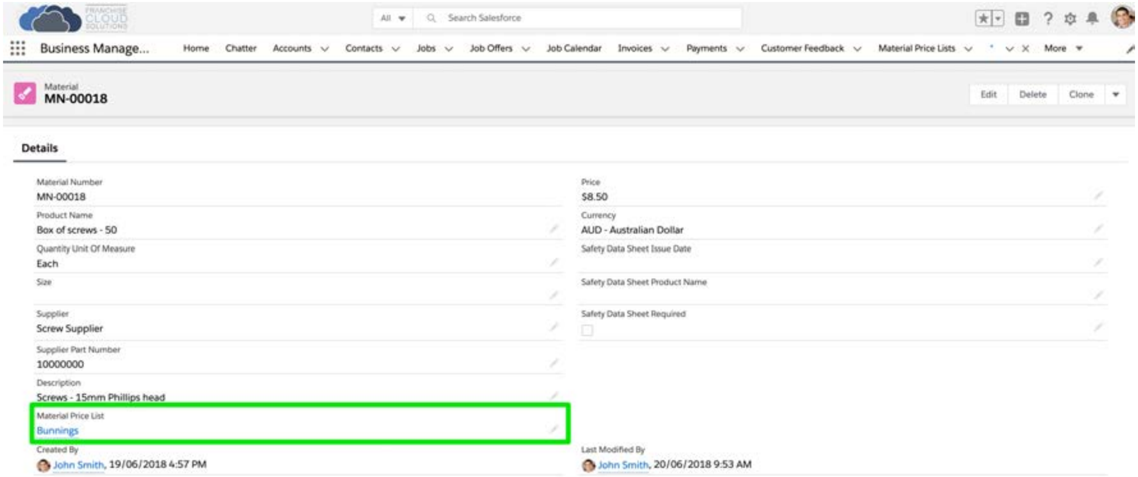
The new material record is added to the price list.



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.



CHAPTER 13

Xero Integration

Understanding Xero integration

Business Management's Financial Integration provides the ability to connect Salesforce financial information with Xero. This allows franchisees to take advantage of the strengths of Salesforce and Business Management, while also providing the financial reporting, controls and compatibility with software required by book keepers and accountants.

What data is exchanged

Business Management exchanges the following financial records

- Accounts
- Invoices
- Payments
- Credit Notes
- Credit Allocations

This data is replicated from Salesforce to Xero. Changes made in Xero are synchronized back to Salesforce.

> Supplier Invoices can optionally be sent to Xero. Supplier Invoices don't sync back from Xero to Salesforce.

When data is exchanged

When you create a new invoice, payment, credit note or credit allocation in a Job owned by a Franchise Profile Account that is connected to Xero, the sync to Xero occurs almost immediately. Customer Accounts are transferred to Xero with the account's first invoice.

When you create a new invoice, payment, credit note or credit allocation in a Xero account that is connected to Business Management , changes are replicated back to Business Management in the next sync cycle. The frequency of the sync cycle is determined by the configuration set by your franchisor.

How to connect to Xero

You will need your own Xero account and have on hand your Xero username and password to connect Business Management to Xero.

> If you manage more than one franchise, you may wish to connect each Franchise Profile Account to a single Xero account. This will allow you to consolidate your accounting. To do this, simply perform the following procedure for each Franchise Profile Account.

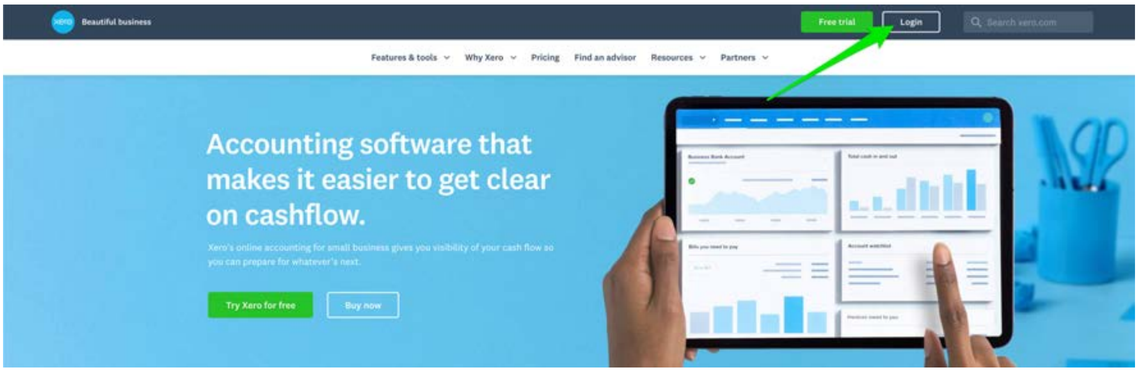
To connect your Master Franchise Profile Account to Xero

1. In your browser, login to Xero.
2. From Salesforce, connect your Franchise Profile Account to Xero.

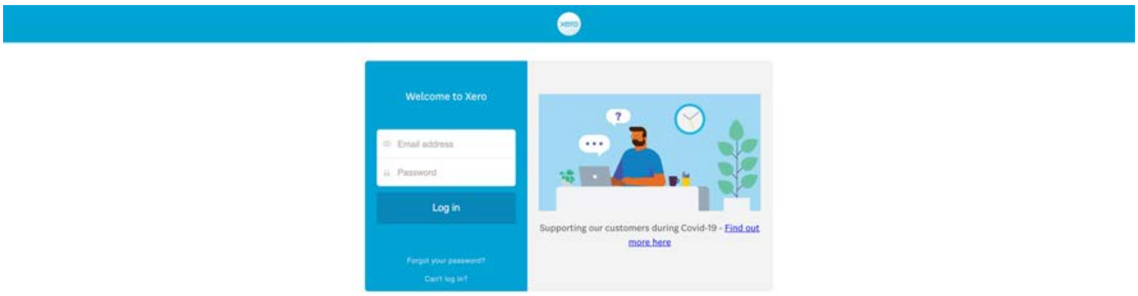
How to do this is described below.

To login to Xero

1. Go to the Xero website www.xero.com.au and click the **Login** button.

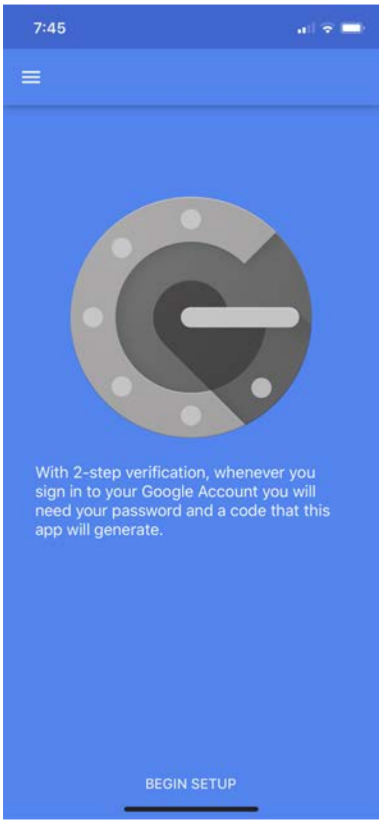


2. Now enter your `Email address` and `Password` then press **Log in**.

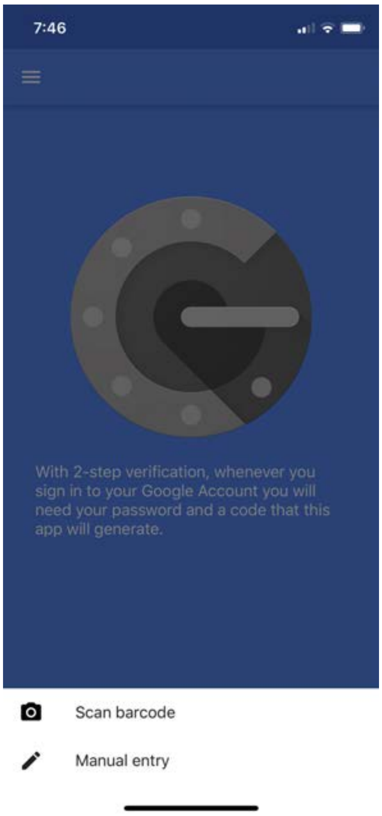


3. Xero may prompt you to set up two-step authentication. Press **Set up two-step authentication** to continue.

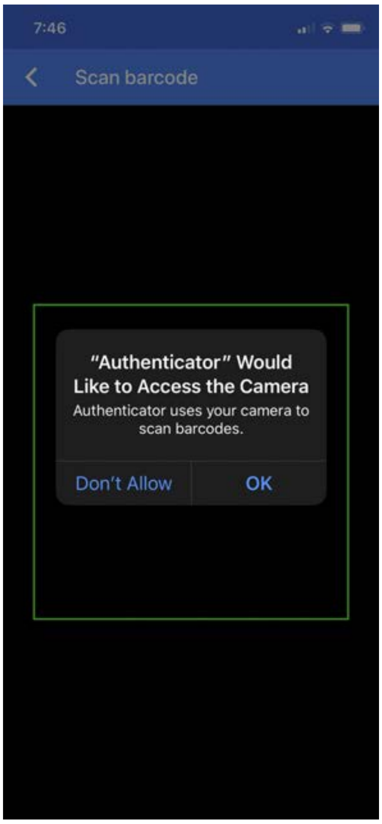
4. If you don't already have the Google Authenticator app on your mobile phone, go to the App Store (for iPhone) or Google Play (for Android) and download the Google Authenticator app.



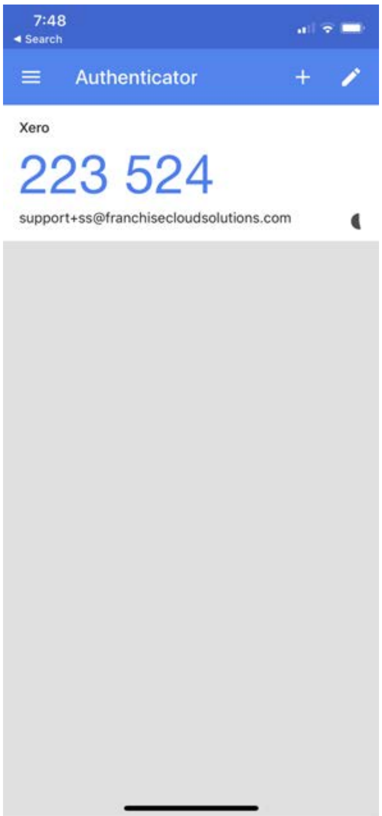
5. If this the first time you've used Google Authenticator, tap **Begin Setup** (otherwise, tap the **+** button) then tab **Scan barcode**.



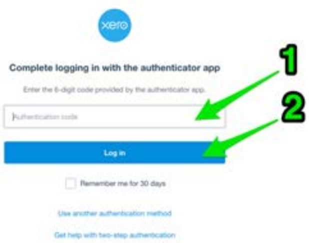
6. If this is the first time you've used Google Authenticator, you may need to grant permission to use your camera. Press **OK**.



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.



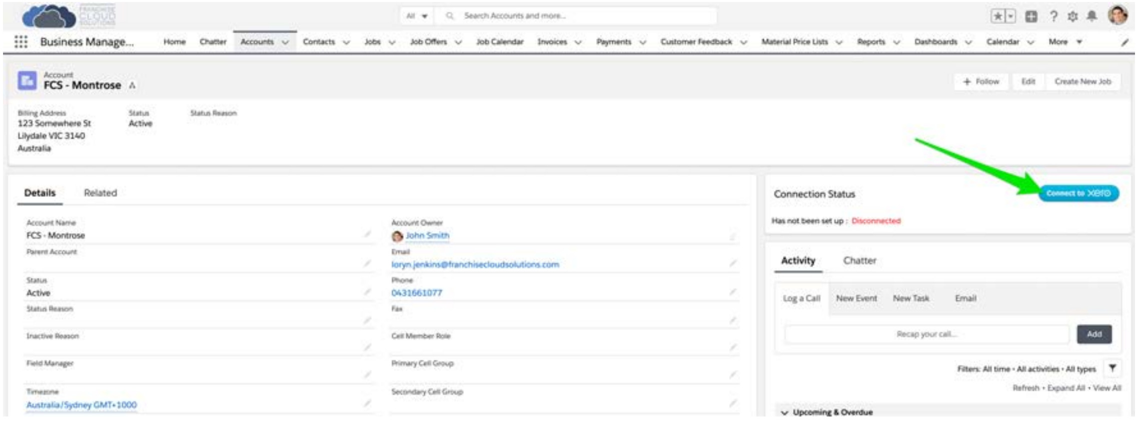
8. Enter the six digit code and press **Log in**.



9. Having logged into your Xero account, you're now ready to connect your Franchise Profile Account to Xero.

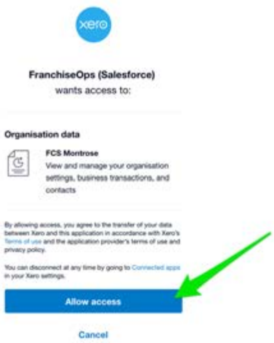
To connect to Xero

1. From your **Franchise Profile Account**, press the **Connect to Xero** button.



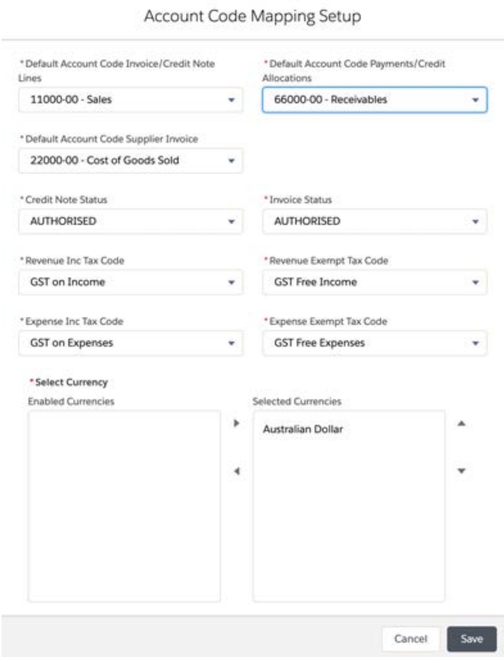
The **Welcome to Xero** login page appears.

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.



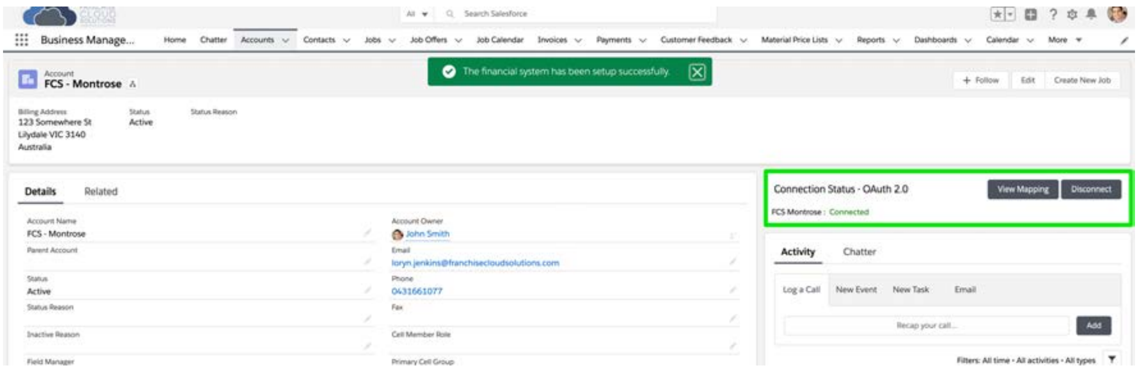
Your **Franchise Profile Account** displays and the **Account Code Mapping Setup** dialog box appears.

3. Select appropriate values for the **Account Code Mapping Setup** and press **Save**.



> 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.



> Now that your Xero account is connected, financial data you enter into Business Management is automatically transferred to your Xero account. Information you enter into Xero is synchronized back to Business Management periodically. How frequently this occurs depends on your franchisor's chosen synchronization schedule. Check with your franchisor for more information on how they have configured synchronization between Business Management and Xero.

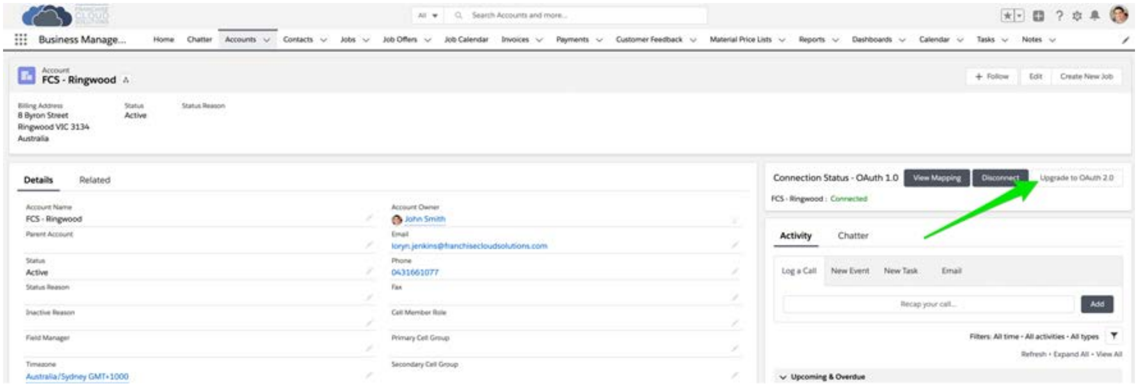
If at any time you need to revise the mapping for a connected account, simply press **View Mapping**. You will be able to edit and save the mapping while it is still connected.

How to upgrade to OAuth 2.0

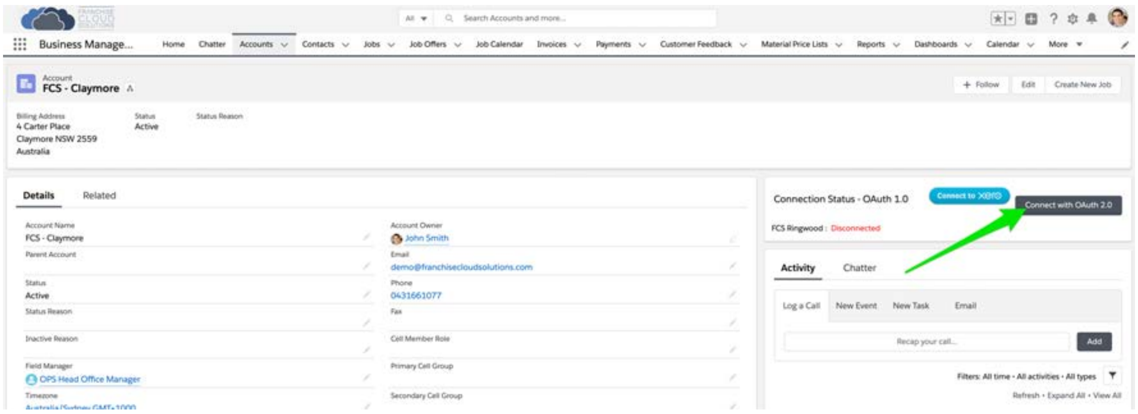
> OAuth 2.0 is a new and improved way to connect to Xero.
>
> For those whose account has already been connected to Xero, you need to perform a one-time upgrade to begin using OAuth 2.0. Follow the instructions below.
>
> For those who have never connected to Xero, *See* “How to connect to Xero” on page cdxxvi.

To upgrade an existing connection to OAuth 2.0

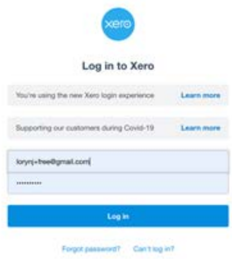
1. When your Franchise Profile Account is currently connected to Xero, press the **Upgrade to OAuth 2.0** button.



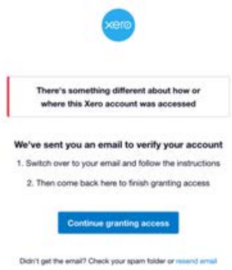
2. Alternatively, when your connection is `Disconnected`, press the **Connect with OAuth 2.0** button.



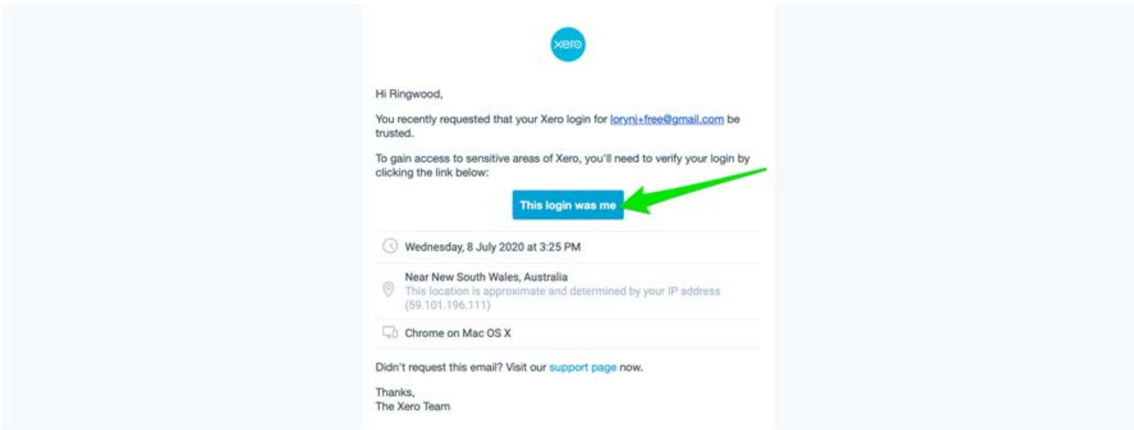
3. Now you are shown a login prompt. Enter your username and password (or accept the suggested username and password), then press **Log in**.



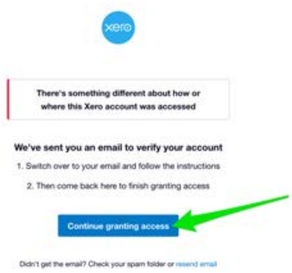
4. If there has been a change in your system (e.g. changing your browser) you may be asked to verify your identity. If you see this, go check your email.



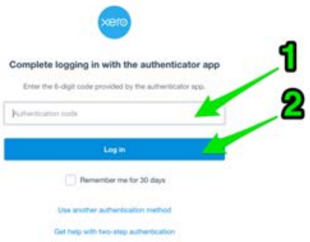
5. Open the email Xero send you and press the **This login was me** button.



6. Now go back to your browser and press the **Continue granting access** button.

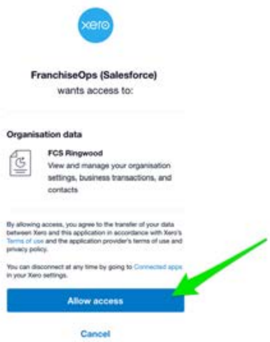


7. If you have previously set up a two-step login, open Google Authenticator on your phone and enter the six digit code, then press **Log in**.

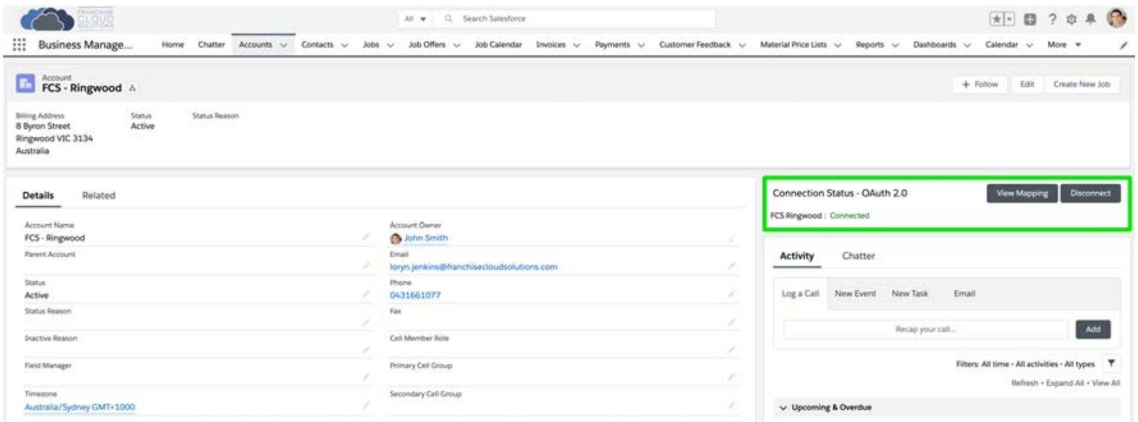


If you have never set up a two step login, you will need to set one up now. *See* “To login to Xero” on page cdxxvi.

8. You are now logged into your Xero account. Grant Salesforce access to your Xero account by pressing **Allow access**.



9. Congratulations! Your Franchise Profile Account is now connected to Xero.



Any invoices you create will now be synced to Xero. Any payments you enter into Xero will be synced back to the Salesforce invoice on a regular schedule. (The schedule is often set to every 15 minutes, but may be different in your implementation.)

Understanding syncing and sync records

Sync Statuses

When you are connected to Xero, your financial records will have an icon showing the sync status of that record. Business Management works by pushing financial information to the financial system and then pulling it back.

Changes in Business Management are immediately pushed to Xero.

Business Management checks periodically to see if data has been changed within Xero. If data has changed then it is pulled back to Business Management.

The results of each push to and pull from the financial system are tracked within the Syncs records attached to the Franchise Profile Account.

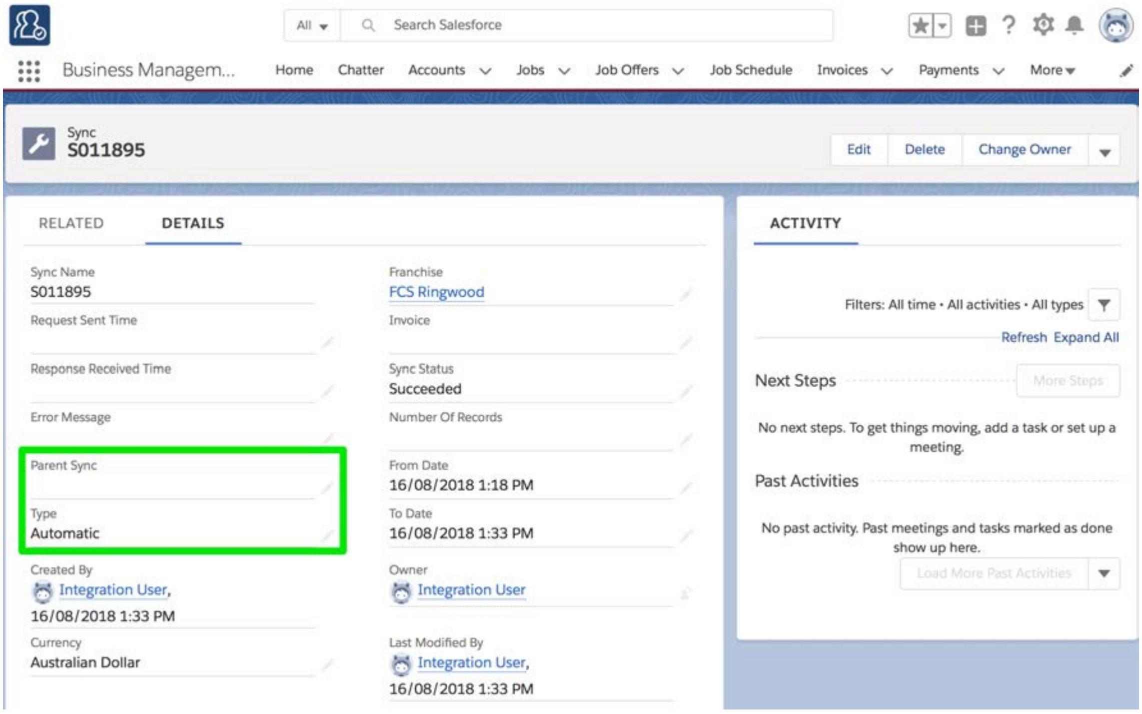
The following table describes the meaning of each sync status.

Icon	Meaning
	Sync has not been attempted.
	The record has been pushed to the financial system and pulled back successfully.
	The record has been pushed to the financial system but not yet pulled back from it.
	The record has been pulled from the financial system.
	Attempt to push the record to the financial system has failed.

Types of sync records

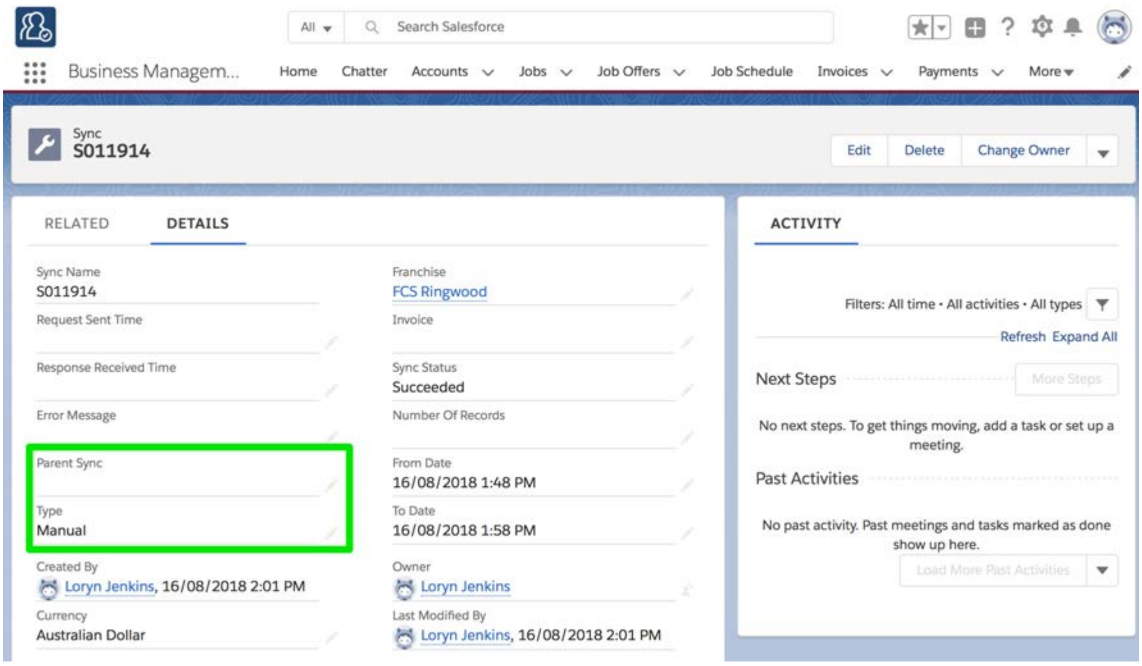
There are three types of Sync records.

» Automated Sync Request records.



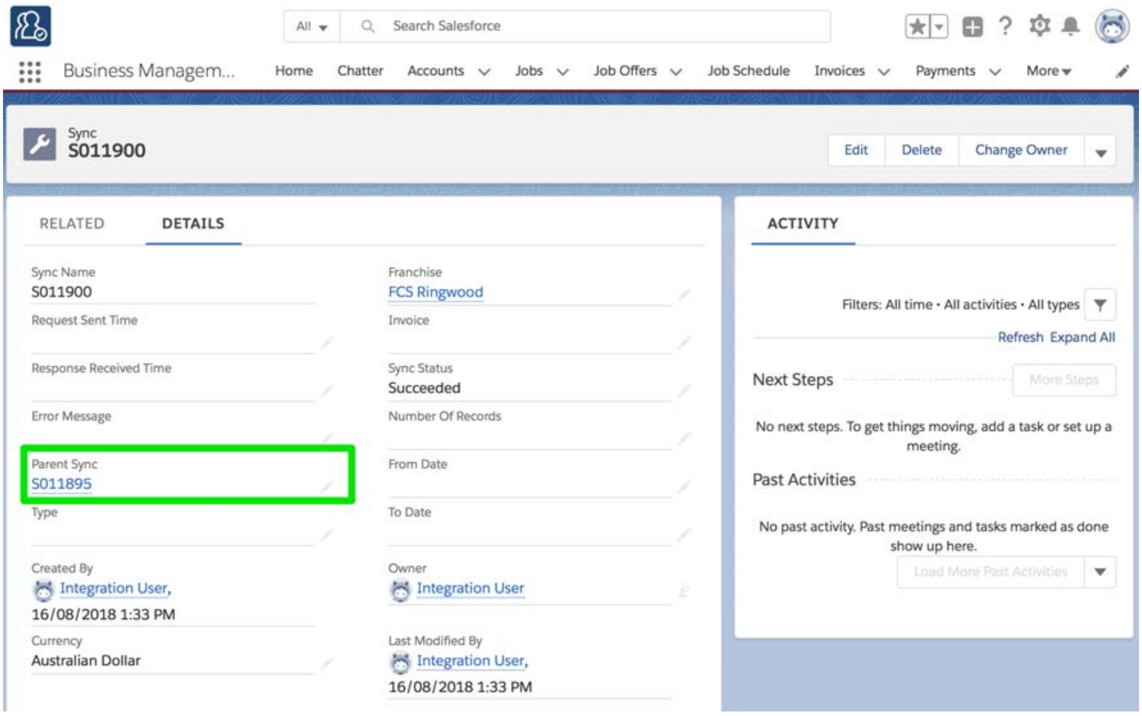
These are the automatic syncs that occur on the schedule set by the franchisor. They have no parent. You recognize an automatic Sync by looking at its `Type`. You recognize it as a Request record by observing that the `Parent Sync` field is empty.

» Manual Sync Request records.



These are Sync operations initiated by a system administrator. You can recognize them by seeing they are of `Type` *`Manual`*, and the `Parent Sync` field is empty.

» Child Sync Response records.



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.

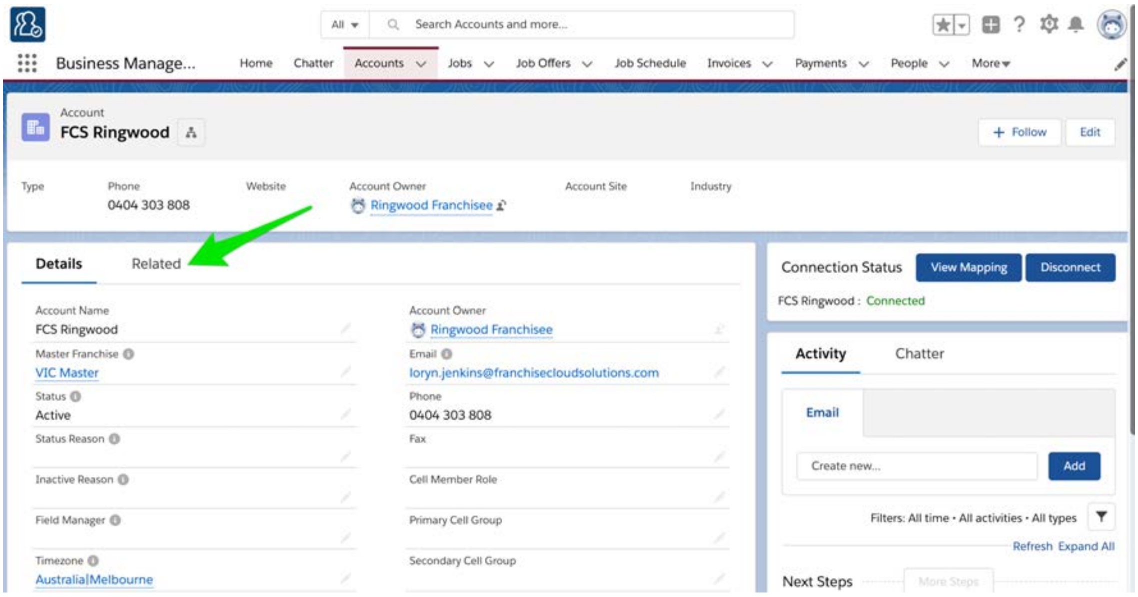
How to find the most recent sync

> This topic assumes you have connected your Xero account. *See* “How to connect to Xero” on page cdxxvi.

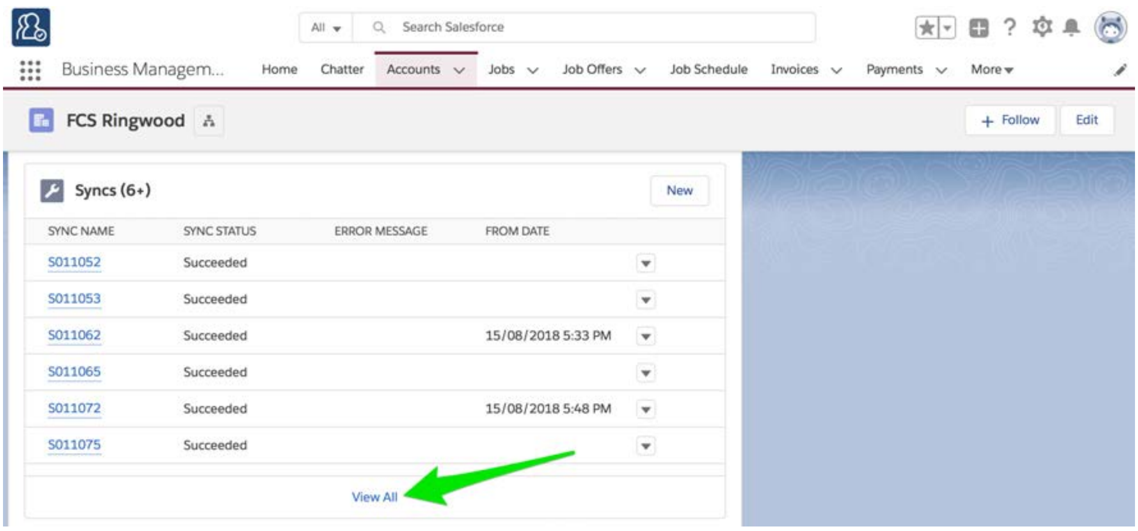
Synchronization occurs automatically based on a schedule configured by your franchisor. Syncs can also be manually initiated by system administrators. You can check the most recent sync history from your Account.

To check the most recent sync period

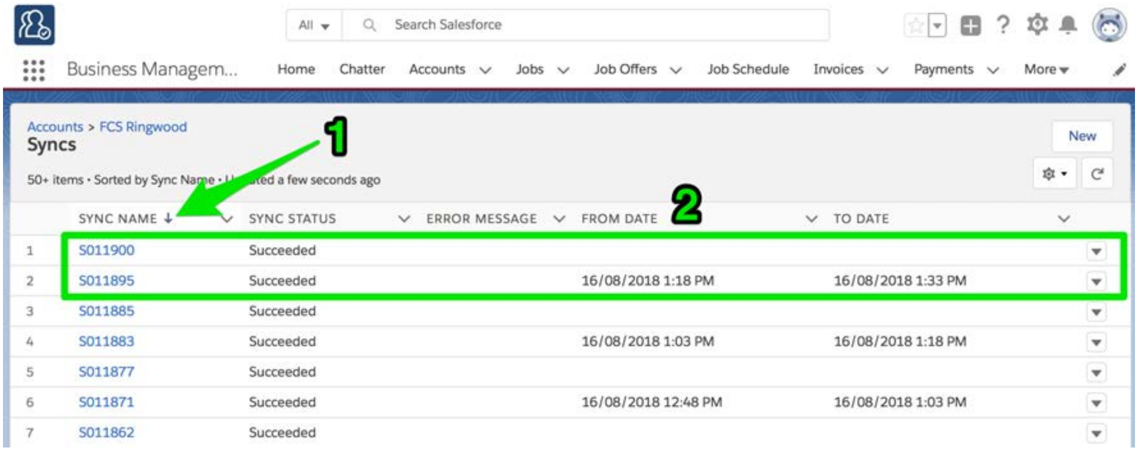
1. From your **Account**, select the **Related** tab.



2. Scroll down to the **Syncs** section, then press **View All**.



3. Click on the `Sync Name` column to order newest to oldest.



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.

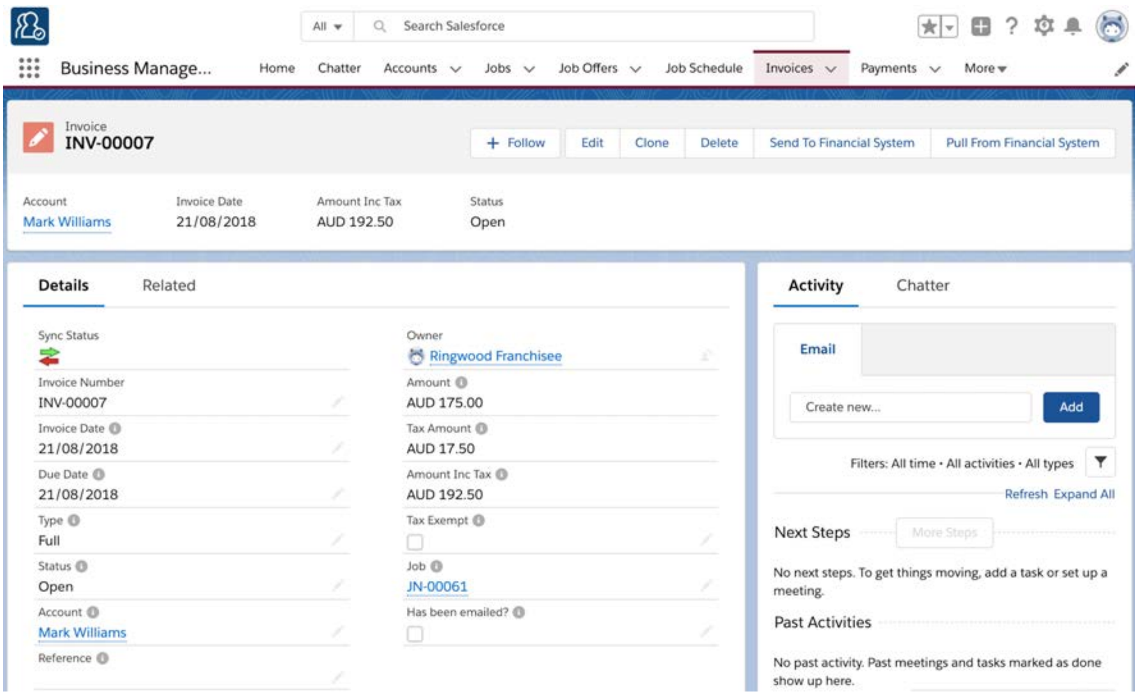
How to update an invoice after it is created

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.

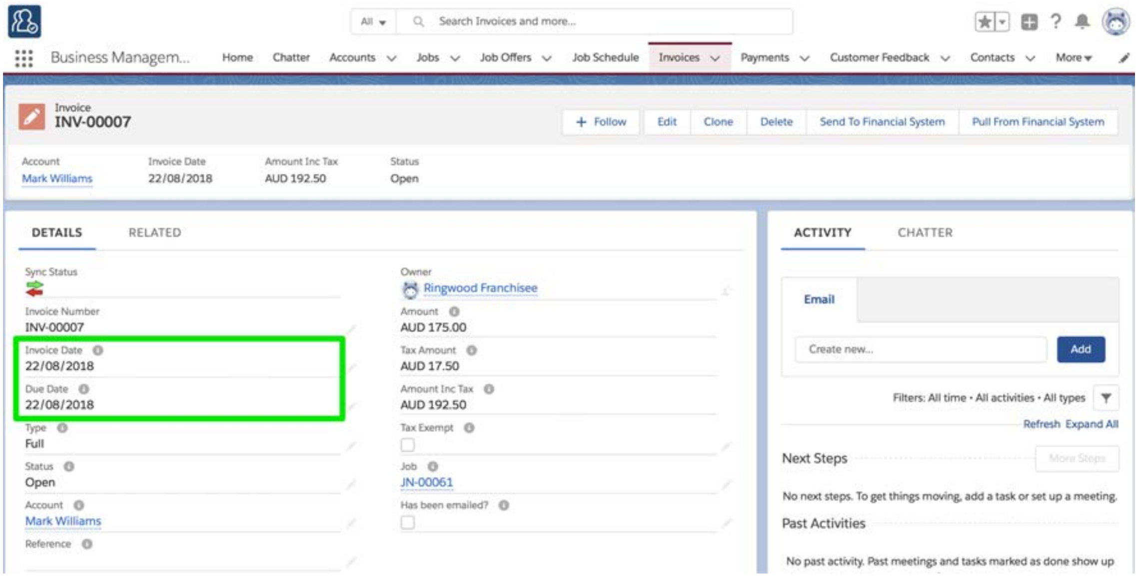
> You can update an invoice to the financial system after the first sync and before any payments are recorded.

To send changes to the financial system

1. Start with an invoice whose details you want to change.

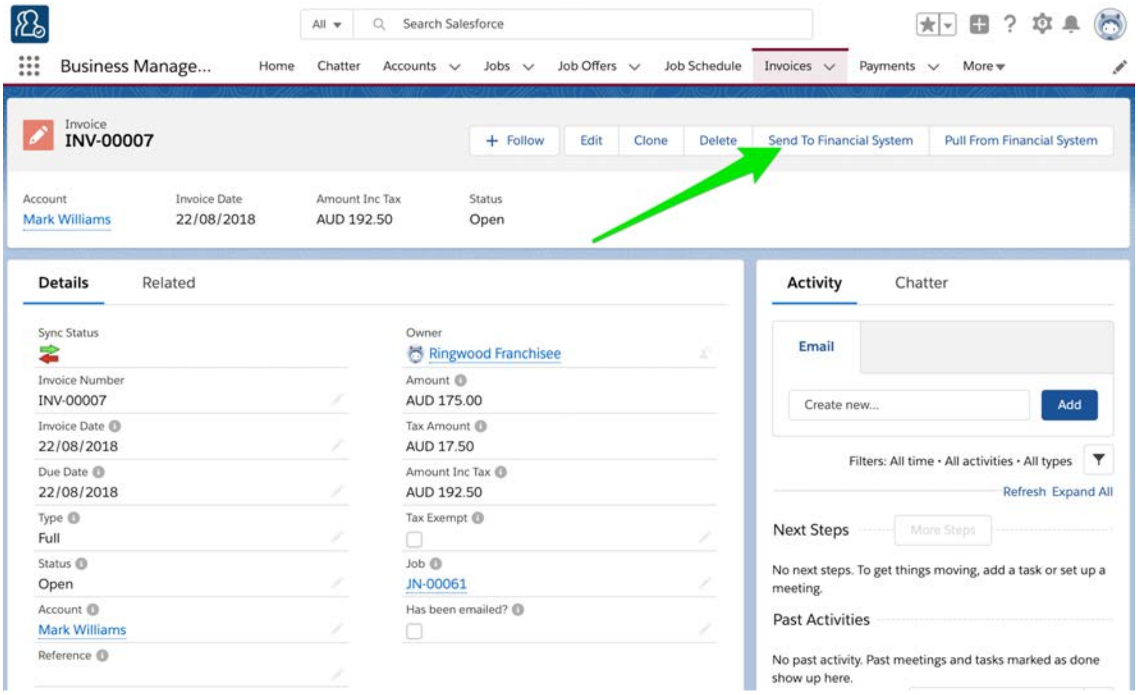


2. Now make a change to it.



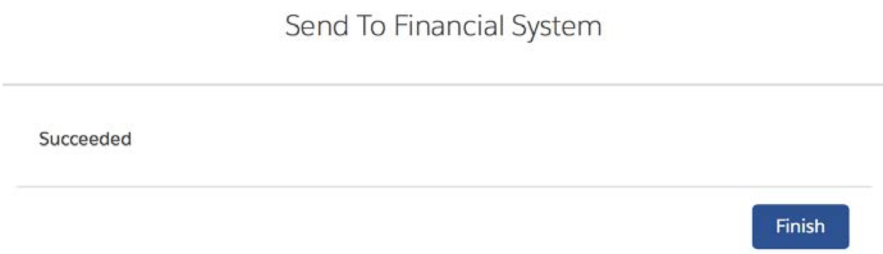
After making the change, you will want to update it in the financial system.

3. From the **Invoice**, press **Send to Financial System**.

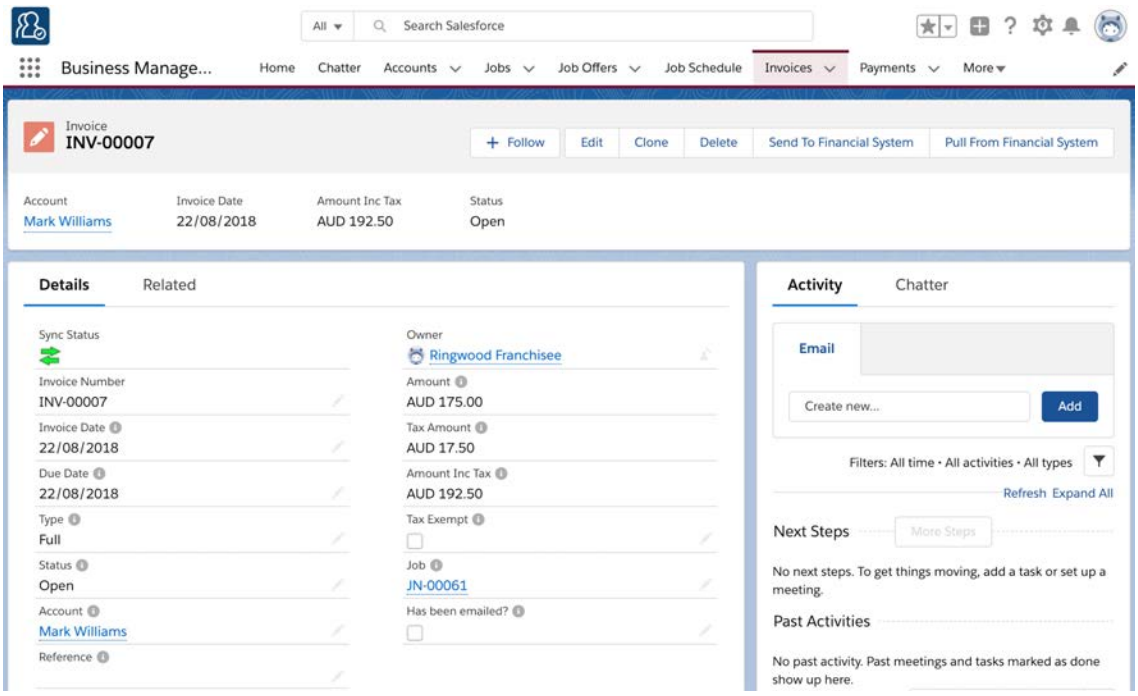


The **Send to Financial System** dialog box appears.

4. Press **Finish**.

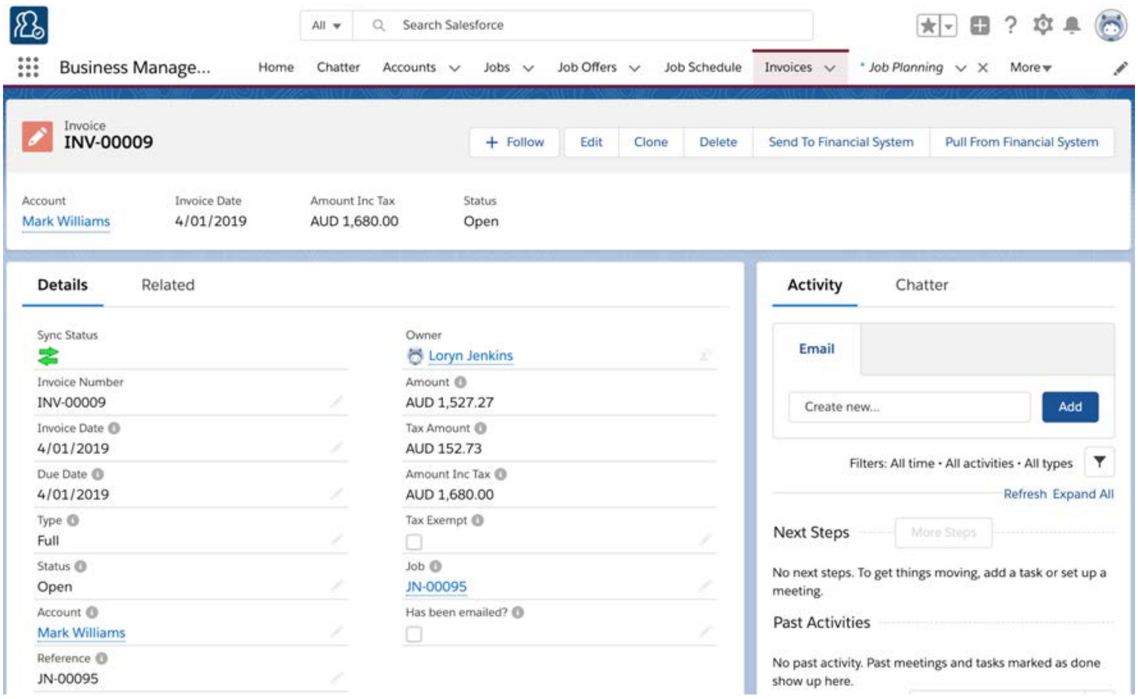


The **Invoice** has now been updated in the financial system.

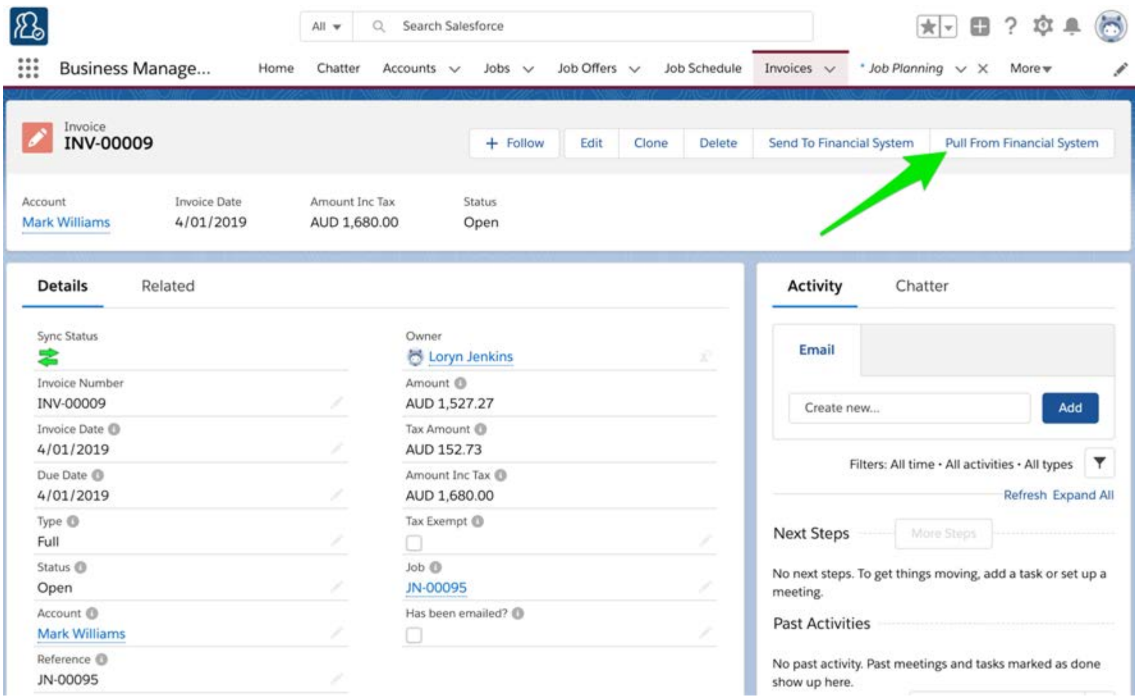


To retrieve changes from the financial system

1. Start with the invoice whose details have been changed in Xero.

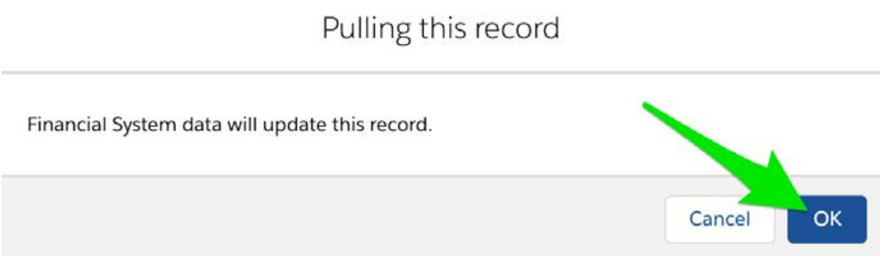


2. Press **Pull from Financial System**.

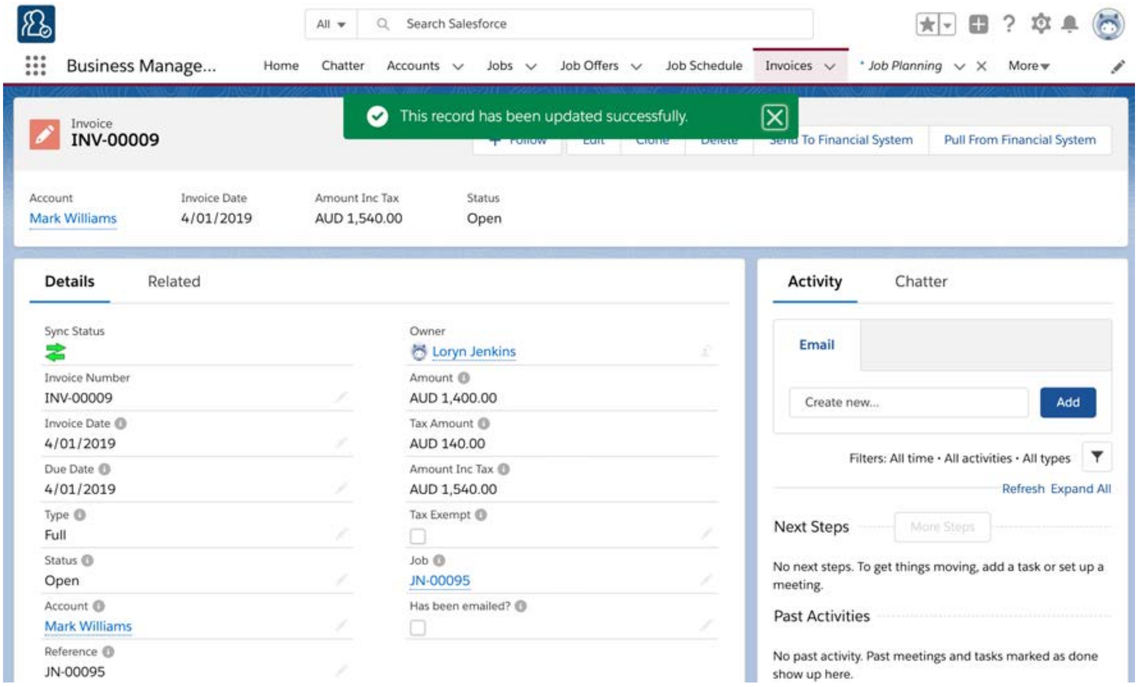


The **Pulling this record** dialog box appears.

3. Press **OK**.



4. The system retrieves and updates the invoice record.

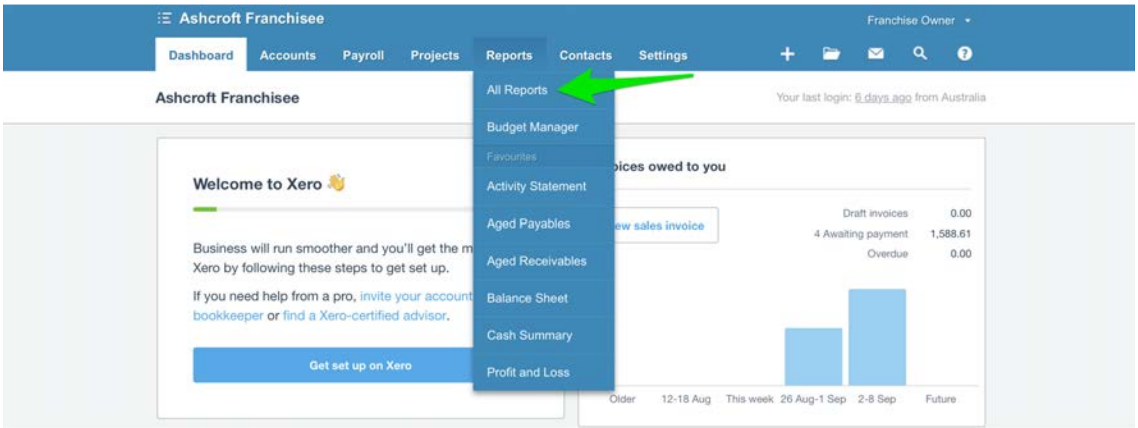


How to perform end of month reconciliation

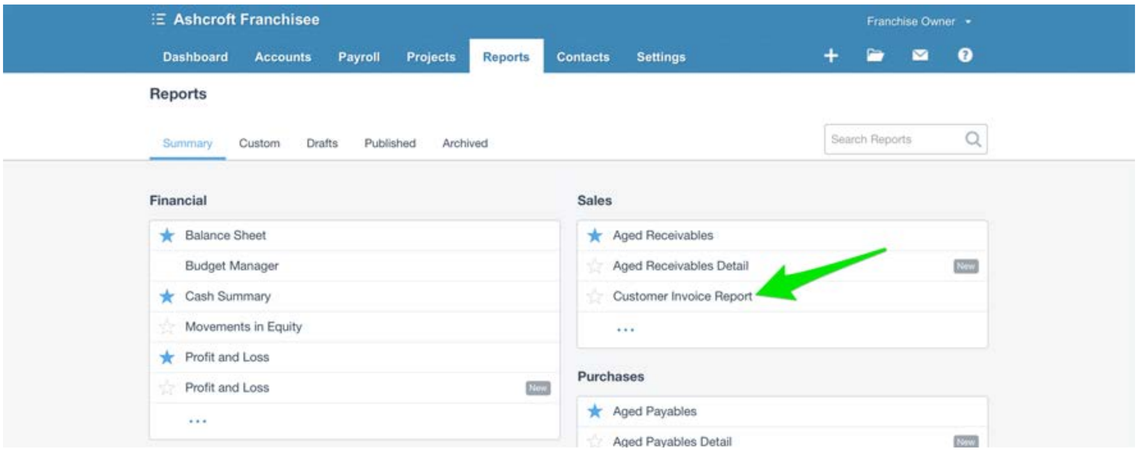
Performing an end of month reconciliation involves comparing the invoice report provided by Xero with the invoice report for Franchise Owners available within Business Management.

To obtain the Xero end of month report

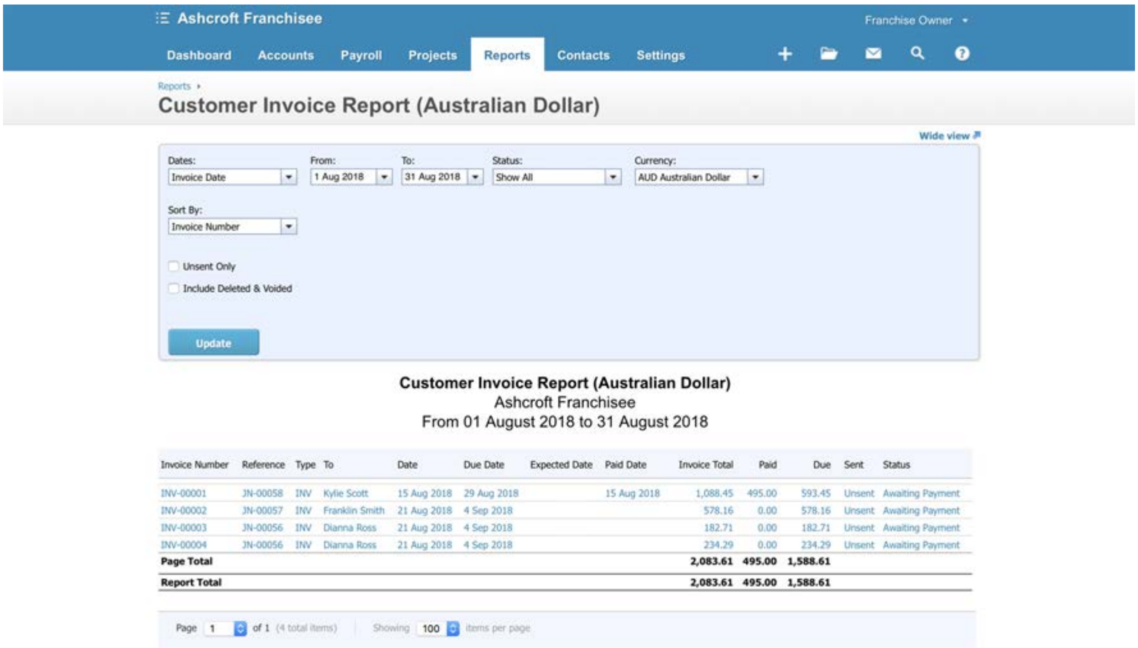
1. Log into your Xero account.
2. From the **Reports** menu, choose **All Reports**.



3. From the **Reports** dashboard, choose the **Customer Invoice Report**.

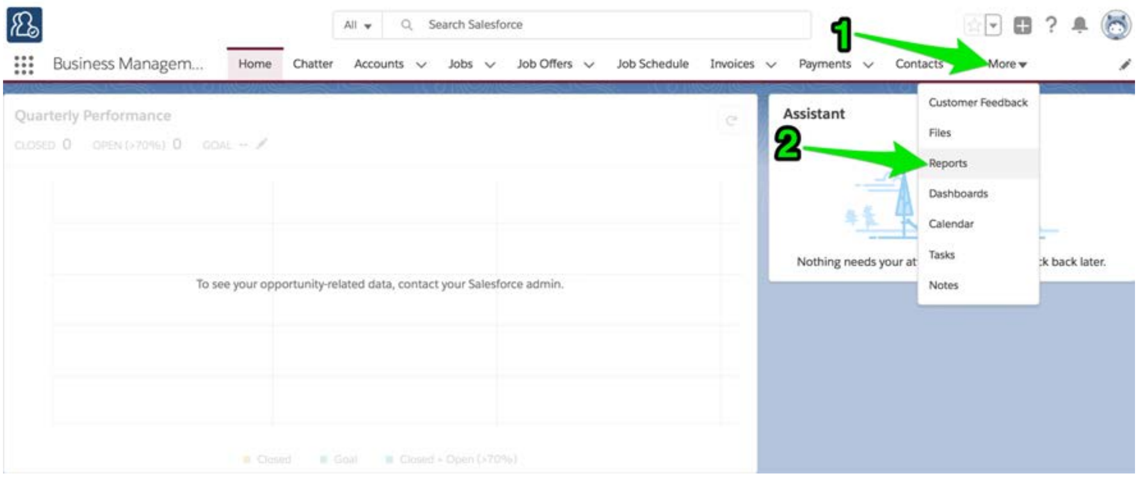


4. Modify the parameters to suit and press the **Update** button. The report appears on-screen and can be exported.

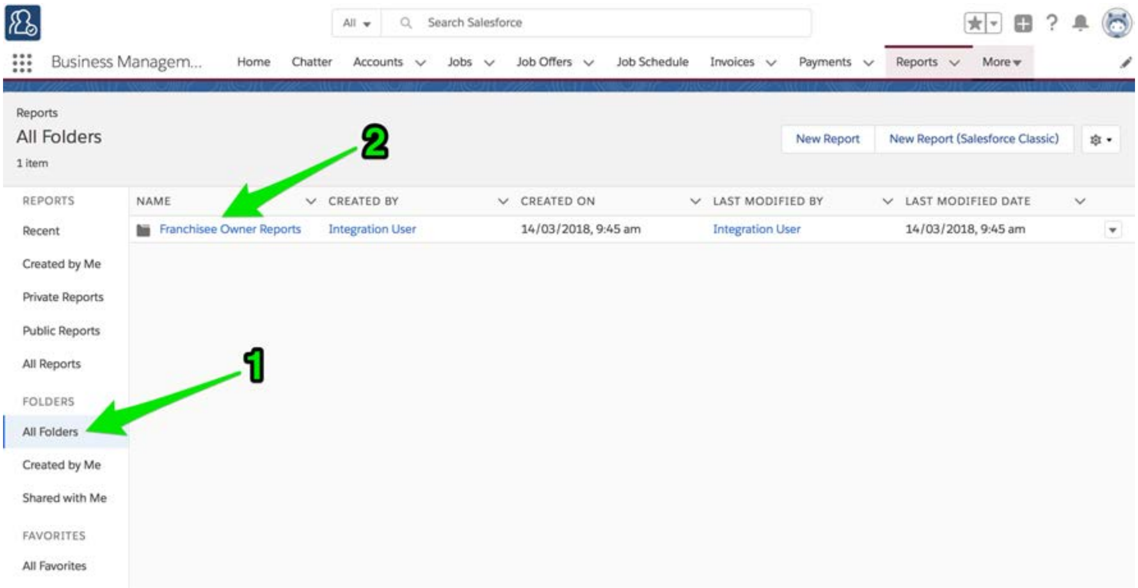


To obtain the Business Management end of month report

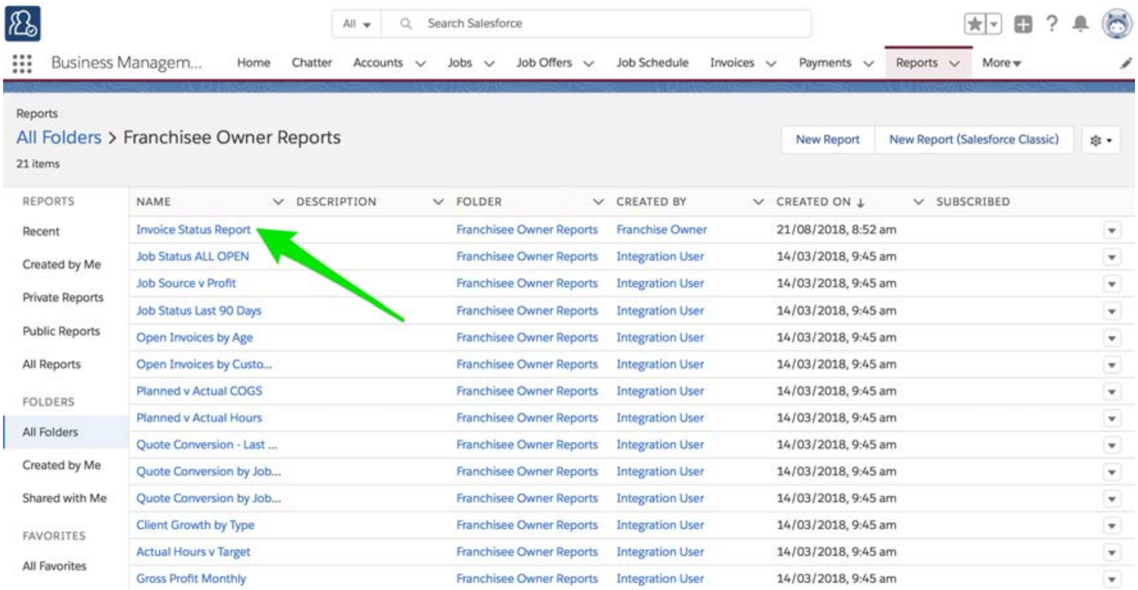
1. From the **Salesforce** menu, select **Reports**.



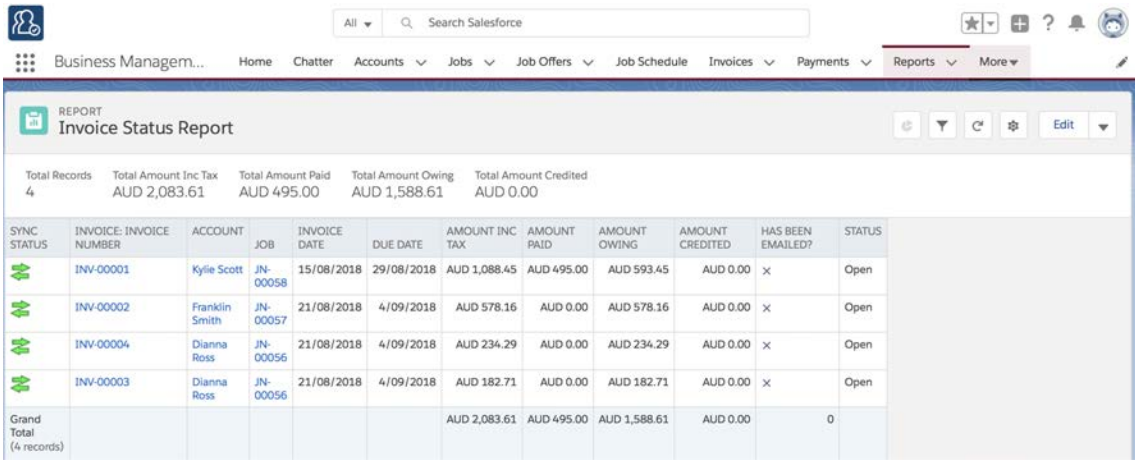
2. From the **Reports** page, go to **All Folders** and select **Franchise Owner Reports** folder.



3. Now select the **Invoice Status Report**.



4. The data for the current month appears. You can export as needed.



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

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.

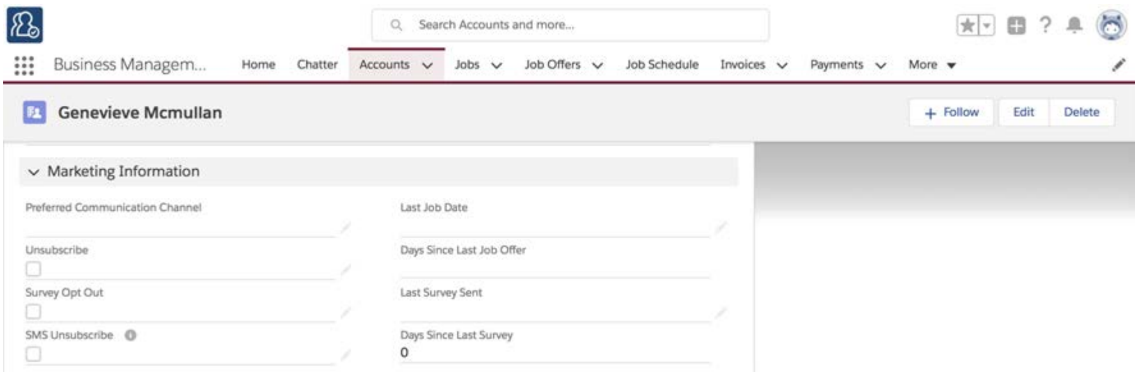
How to remove someone from job satisfaction surveys

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.

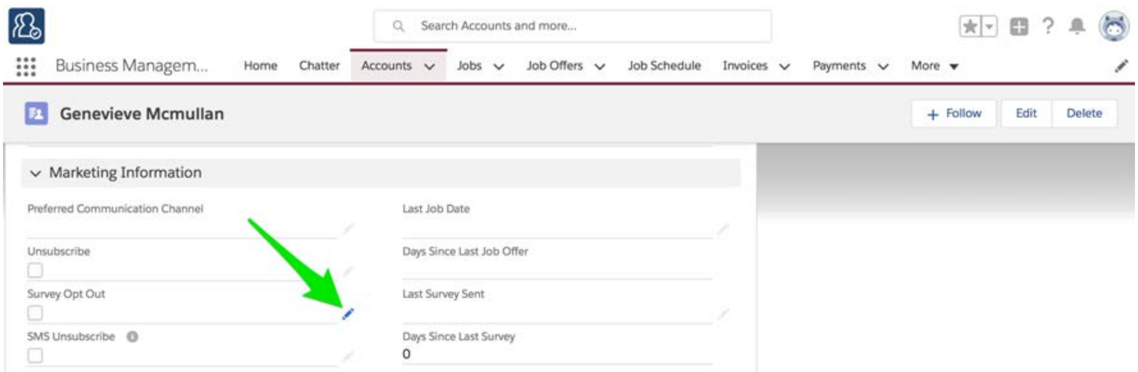
> By default **Business Accounts** and **Contacts** are excluded from customer feedback programs.

To prevent an existing customer from being included in a customer feedback survey

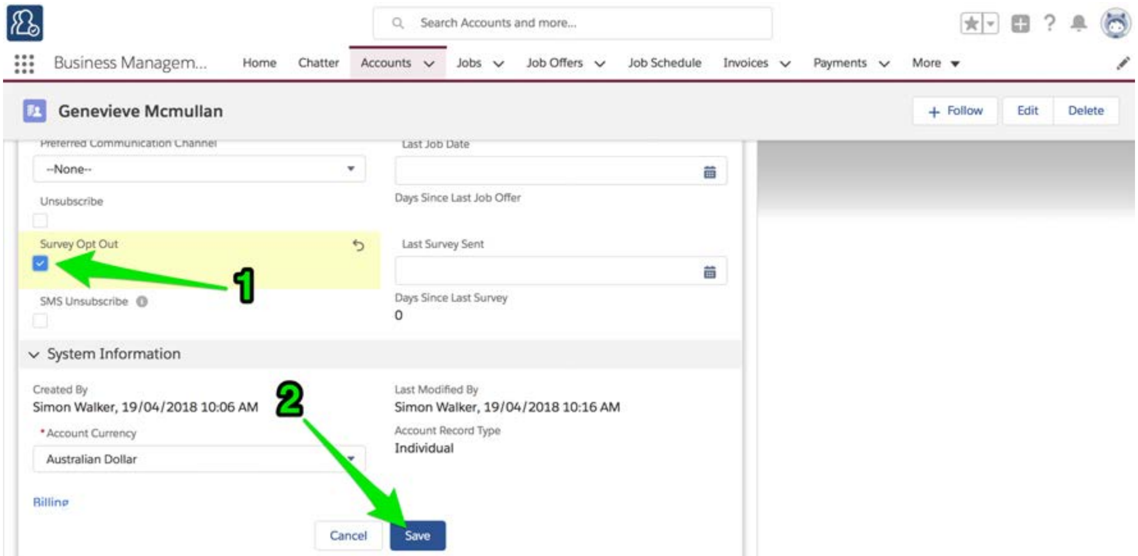
1. Find and open the customer's **Account**.
2. Scroll down to the **Marketing Information** section.



3. Place the **Account** in **Edit** mode.



4. Check `Survey Opt Out`, then press **Save**.



The customer will now be excluded from the customer feedback program.

CHAPTER 15

Working with Reports

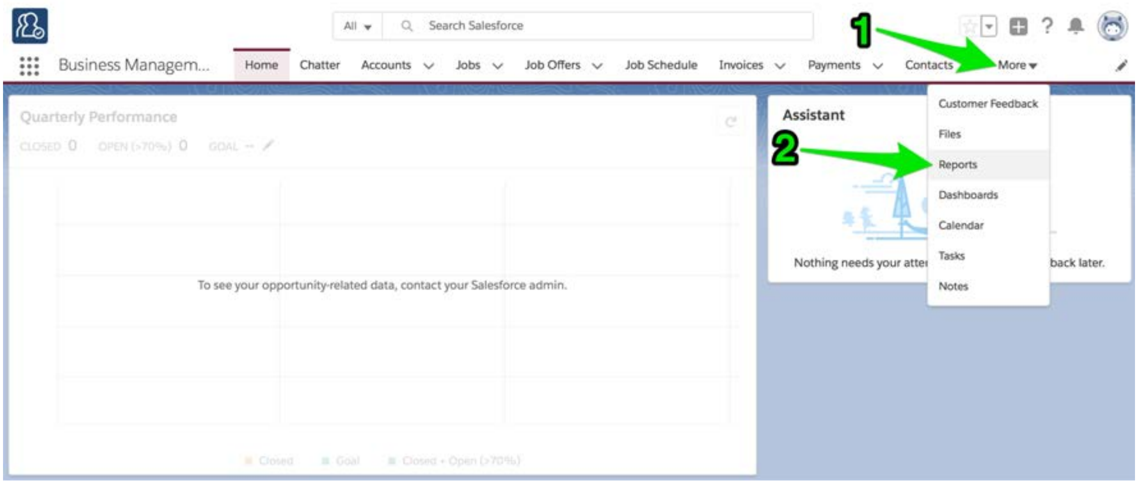
Understanding reports

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.

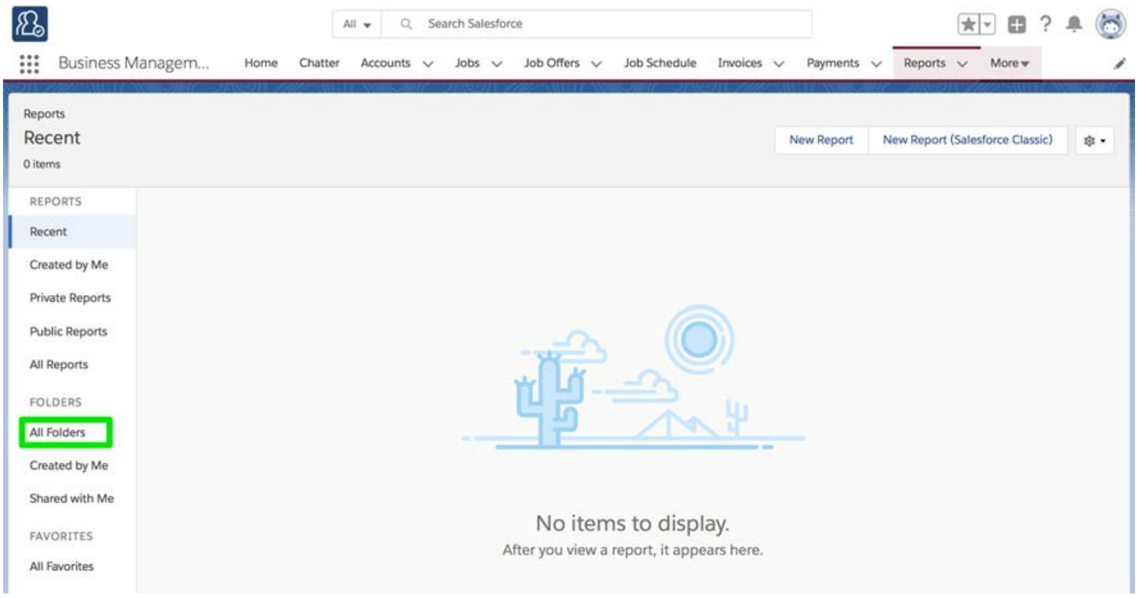
To discover available reports

1. From the Salesforce menu, choose **More**, then choose **Reports**.



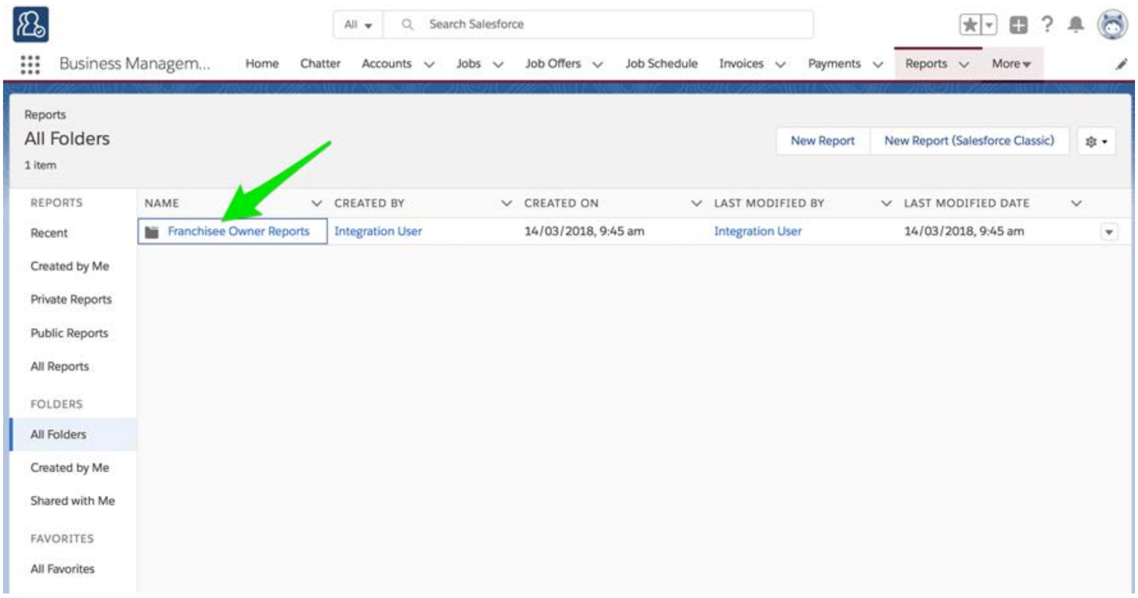
   The recent reports folder appears. If you have yet to use a report, this will be blank.

2. To see the different types of reports, go to the **All Folders** folder.

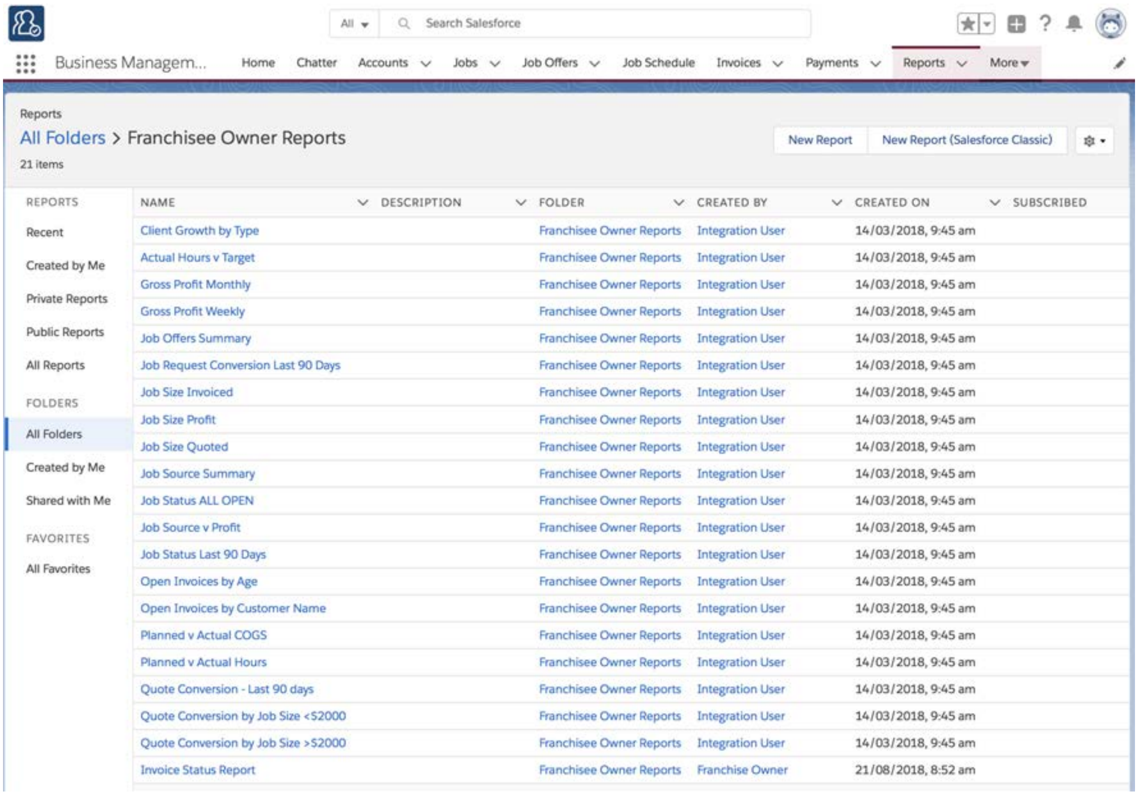


   There you will see each of the different categories of report that come with Business Management.

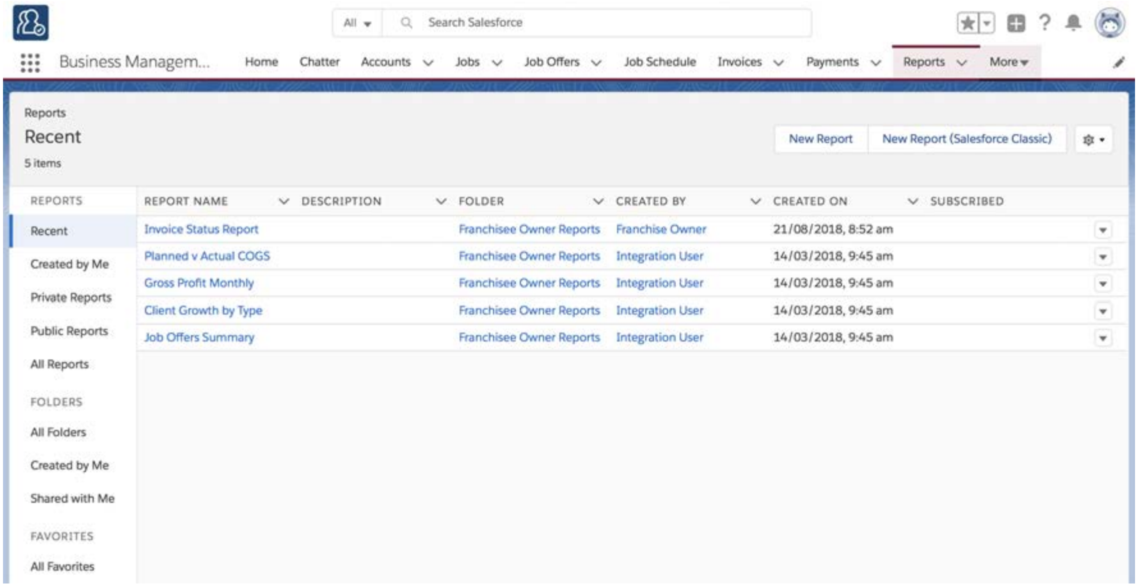
3. Select any one of the report folders.



Now you can see the reports within that folder.



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.



Standard reports

While you can always create your own reports, the reports that ship with Business Management are summarized below.

Franchise Owner Reports

Report Name	Description
Actual Hours v Target	Count of job offers by week.
Client Growth by Type	New accounts listed by month.
Gross Profit Monthly	Gross profit by month.
Gross Profit Weekly	Gross profit by week.
Invoice Status Report	Enable periodic reconciliation with external financial system.
Job Offers Summary	Count of jobs in each status by created date.
Job Request Conversion Last 90 Days	Converted leads vs job count in the last ninety days.
Job Size Invoiced	Count and sum of actual hours aggregated by job value.
Job Size Profit	Profit aggregated by job size.
Job Size Quoted	Count and sum of quoted hours aggregated by job value.
Job Source Summary	Count of jobs by month.
Job Source v Profit	Profit grouped by job source.
Job Status ALL OPEN	Count of jobs by status.
Job Status Last 90 Days	Jobs by status in the last ninety days.
Open Invoices by Age	Invoice numbers by account by age.

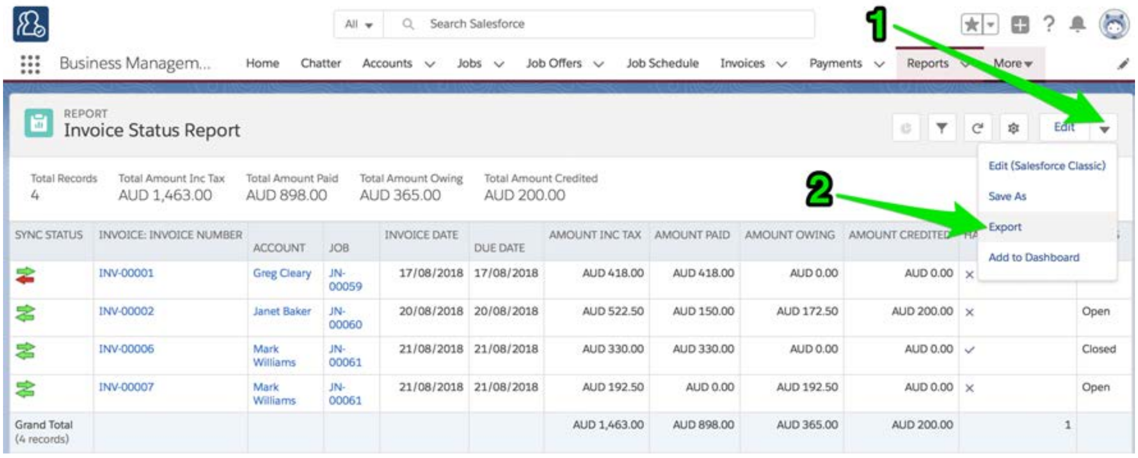
Report Name	Description
Open Invoices by Customer Name	Invoice numbers by account name.
Planned v Actual COGS	Estimated cost of goods sold (COGS) value vs actual COGS value.
Planned v Actual Hours	Estimated hours vs actual hours by month.
Quote Conversion - Last 90 Days	Job count and dollar value as a percentage of quotes issued in the last 90 days.
Quote Conversion by Job Size < $2,000	Job count and dollar value as a percentage of quotes issued where job size is less than $2,000.
Quote Conversion by Job Size > $2,000	Job count and dollar value as a percentage of quotes issued where job size is greater than $2,000.

How to export a report

You can export the results of a report to Excel or a comma delimited format.

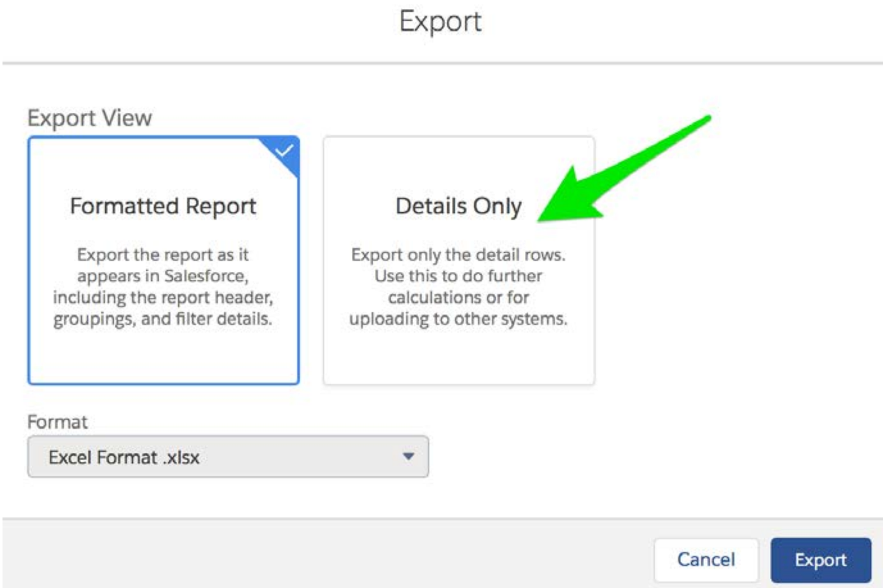
To export report results

1. From any report, press the **Show more** button then choose **Export**.



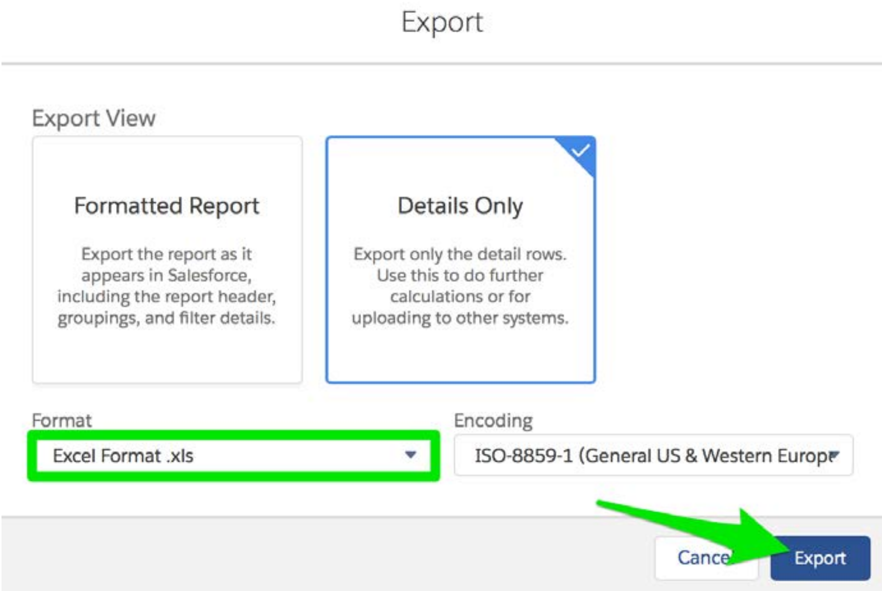
The Export dialog box appears.

2. Choose between a **Formatted Report** and a **Details Only** report.



A **Formatted Report** will appear similar to what you see on-screen and is useful for printing or pasting into emails and reports. A **Details Only** report is preferable for performing further calculations.

3. If you choose Details Only, choose the format you need (`Excel format .xls` or `Comma Delimited .csv`) then press **Export**.



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

Congratulations for starting along the pathway to accelerate your operations using Franchise Cloud Solutions products. We know you're likely to have questions and need support along the way.

The first port of call should always be our comprehensive video tutorials and user guides.

Knowledge Base

Franchise Cloud Solutions maintains a Knowledge Base covering

- Release Notes
- Tips & Tricks
- Configuration instructions
- Error messages

Customers can access the Knowledge Base at any time.

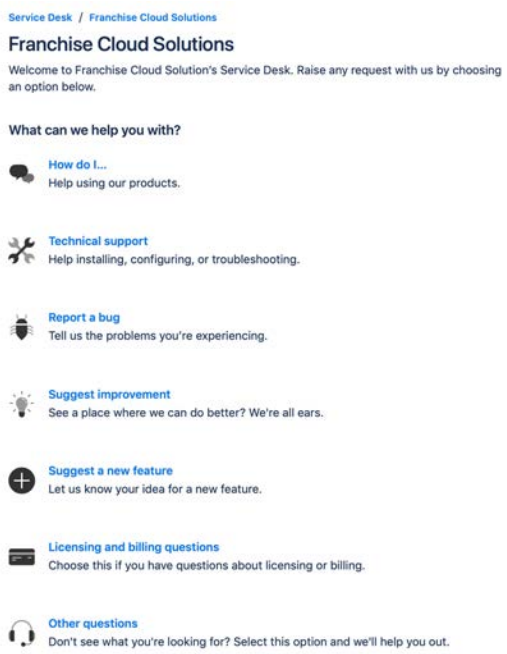
Contacting Customer Support

Customers can access our customer support team between the hours of 8:30 am and 5:30 pm Monday through Friday. Your project manager will add key personnel to our Service Desk to allow them to raise issues and request assistance.

> Customers can also reach our support team by sending email to
> » service@franchisecloudsolutions.com

Raising Service Requests

When you log into the Service Desk, you're shown a list of the types of service requests you can raise with us. We ask you to choose the most appropriate request type so that we can help you most effectively.



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 you business rules?
2. How your team members achieve the task today.
3. How you reckon the task could best be achieved in our software.

Most people only tell us #3.

We're always more able to help you if you give us all three pieces of information.

How to Report a Bug

Franchise Cloud Solutions implementations come with a suite of test cases to assist you with UAT. Each UAT case provides a set of steps that you should be able to follow to completion.

If a test fails, then congratulations!, you have just found a bug!

There may be several different reasons for bugs. It might be:

- a browser bug
- a problem with our code
- an issue with test data or templates
- a documentation bug
- an issue with the test suite
- or, perhaps, something else entirely.

Whatever the case may be, reporting it well and in a timely fashion will help us resolve the issue as soon as possible.

What is a useful bug report?

When you do find bugs that need fixing, we're keen to get them resolved as soon as possible. What really helps with this is getting all the information we need to identify the issue.

> Some of this depends on getting high quality information from you.
>
> **Here's how you can help us help you!**

Within our Help Desk, you can see all the service requests that your organization has filed. We'd appreciate it if you'd check that your bug hasn't already been raised.

When you log a bug, please remember to describe only a single bug in a service request. **Feel free to raise as many issues as you need!**

Here are some tips on writing a good bug report.

How to write a good bug report

Write a **Summary** that outlines the bug as best you can describe it.

Within the **Detail** section, we need the following information

1. What happened? What concrete things did you observe?
2. Steps to replicate? List each page, field, data value and button pressed to replicate.
3. What you expected the system to do (if there was no error).
4. The error that you observed.
5. Your browser and operating system.
6. Include a screen shot of the issue. Make sure the screen shot includes the entire window.

Optionally, we would invite you to also characterize the Business Impact according to this scale.

1. Who is affected (franchisees/who in head office)? What proportion of franchisees?
2. Visibility? Estimate of how many times per month (per franchisee/affected party) this issue will be encountered.
3. Blocks? Does this block a process? What process is blocked?

Example Bug Report (minimal)

Summary

Franchisee does not have permission to create a new job from a customer's Accounts page.

Description

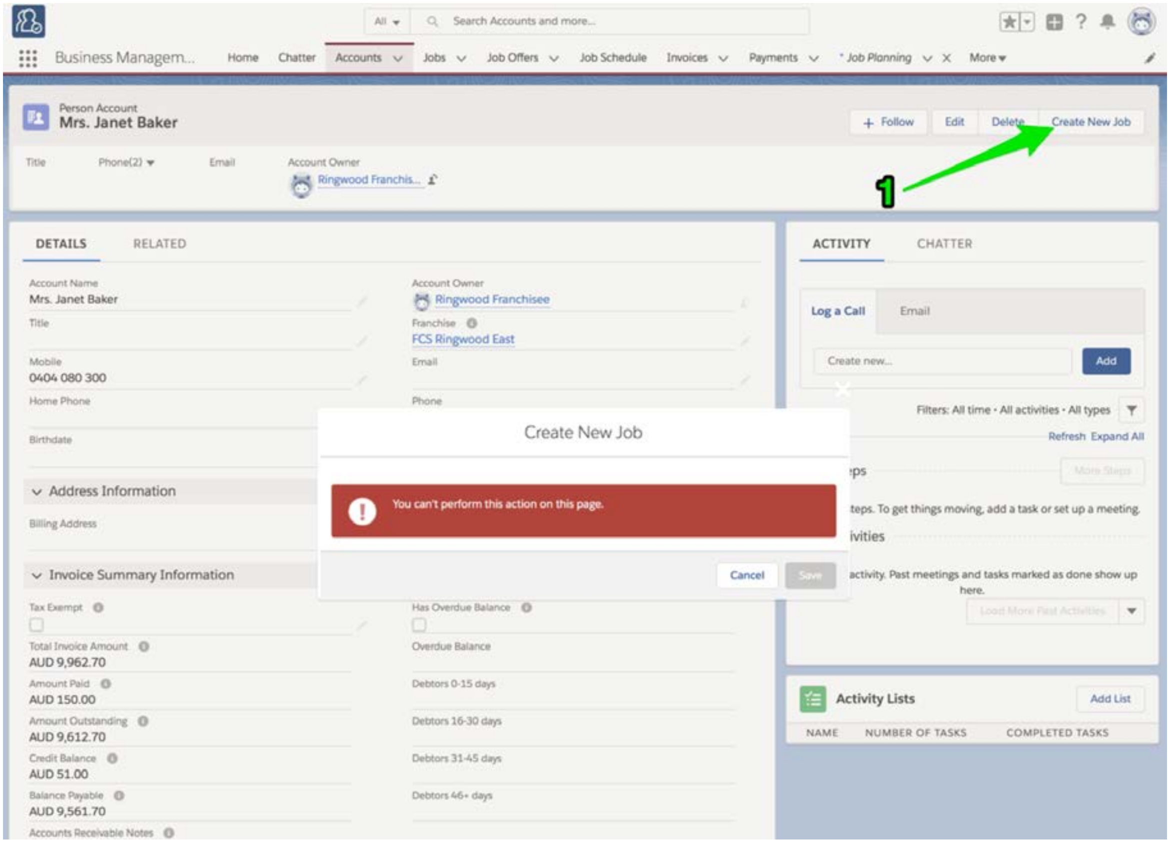
Cannot create new job from a customer's Account page.

To replicate:

1. Log into Business Management as a franchisee.
2. Go to the Accounts tab and select an account.
3. Click the Create New Job button.

EXPECT: A new job to be created.

ACTUAL: Error dialog "Create New Job" displays with the message "You can't perform this action on this page."



Environment

Sandbox.

Google Chrome.

Desktop (Windows 10).

Example Bug Report (technical details)

Summary

Accounts with Financial Integration throw component error on page load

Description

In a Franchise Account already connected to Xero (e.g. HAH Prod: Ringwood East), clicking onto the Account Details screen causes the Account Code Mapping Setup dialog to appear. When it appears, it throws A Component Error exception.

Component error throws in both Chrome and Safari.

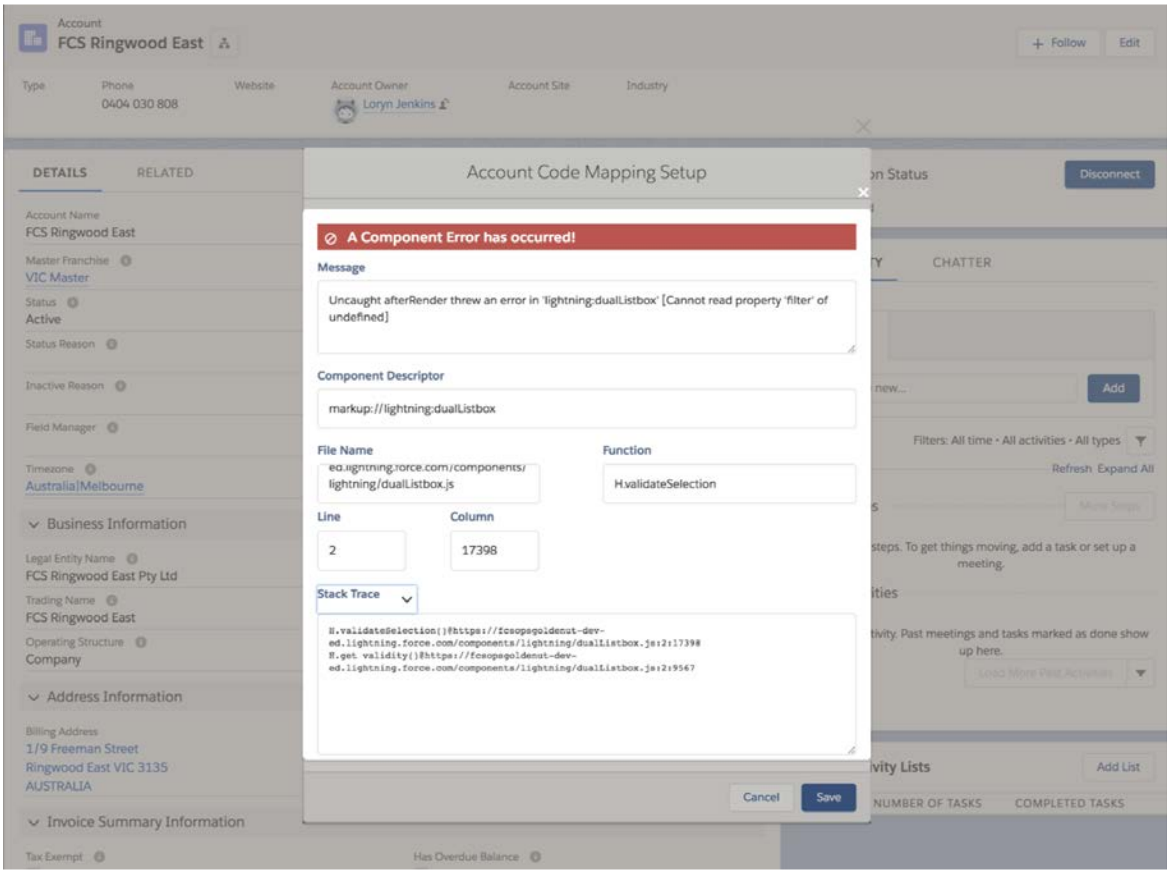
I'm logged into Golden UAT as system administrator.

To replicate

1. Go to the Accounts screen.
2. Choose the **FCS Ringwood East** account.

EXPECT: FCS Ringwood East account displays.

ACTUAL: FCS Ringwood East account displays, loads Account Code Mapping Setup dialog, and immediately throws Component Error.



Error details

`Uncaught afterRender threw an error in 'lightning:dualListbox' [Cannot read property 'filter' of undefined]`

`Message`

`markup://lightning:dualListbox`

`Component Descriptor`

`https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js`

`Function`

`H.validateSelection`

`Stack Trace`

`H.validateSelection()@https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js:2:17398`

`H.get validity()@https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js:2:9567`

Environment

Production

Google Chrome OR Safari (BUT NOT Firefox).

MacOS 10.13.

Example Bug Report (medium complexity replication)

Headline

Events on job calendar are clickable only once per instantiation.

Description

You can only cause the Event dialog to appear on an event in the calendar ONCE per instance. After you've used up your one click, you have to reload the calendar in order to cause the Event dialog to re-appear.

To replicate:

1. Open calendar.

2. Click on an event. The **Event** dialog box appears.

3. Click the **Cancel** button.

4. Click again on the same event.

EXPECT: Event dialog to re-appear.

ACTUAL: Event object is not clickable (does not show clickable mouse pointer; clicking on it elicits no response).

Further:

5. Click on another event. The **Event** dialog box appears. (So, it's only the event that was clicked that has become unclickable; not all events on calendar.)

6. Click **Cancel**.

7. Click again on the same event.

EXPECT 1: Event dialog to re-appear.

EXPECT 2: Event object unclickable.

ACTUAL: Event object is not clickable.

Environment

Safari & Chrome

Mac OS 10.12

Business Impact

» Who affected: All franchisees, Users of Job Calendar.

» Visibility: 40 times per month per franchisee.

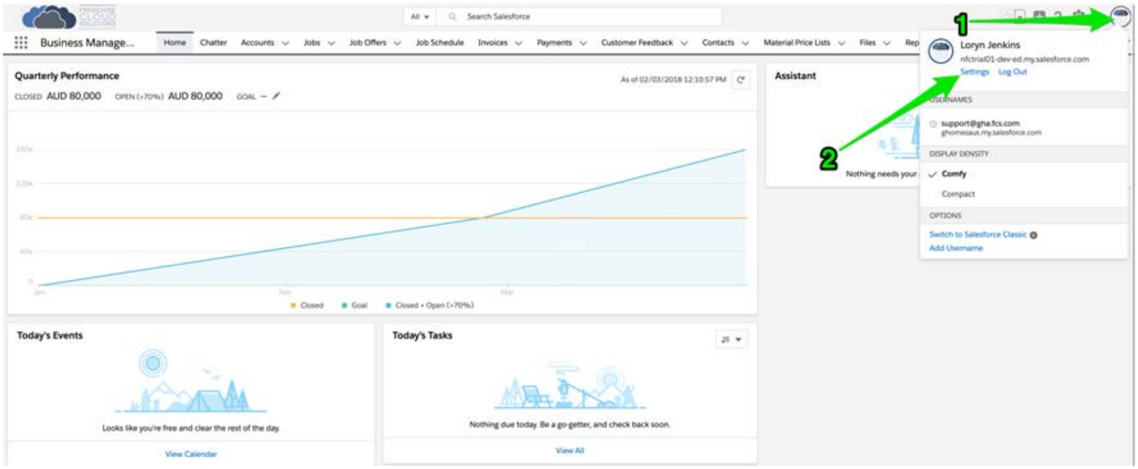
» Block: None.

Granting Account Login Access

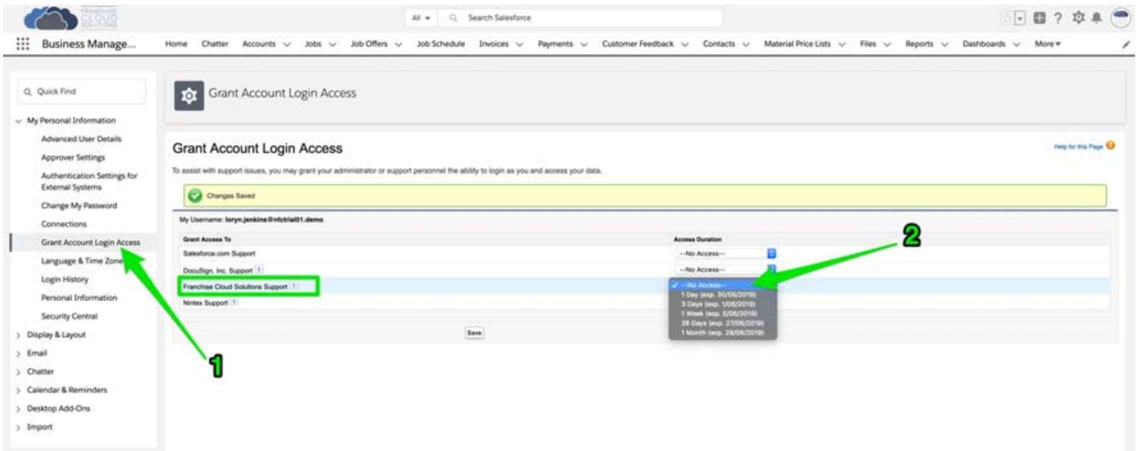
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

To provide our customer support team access to your system

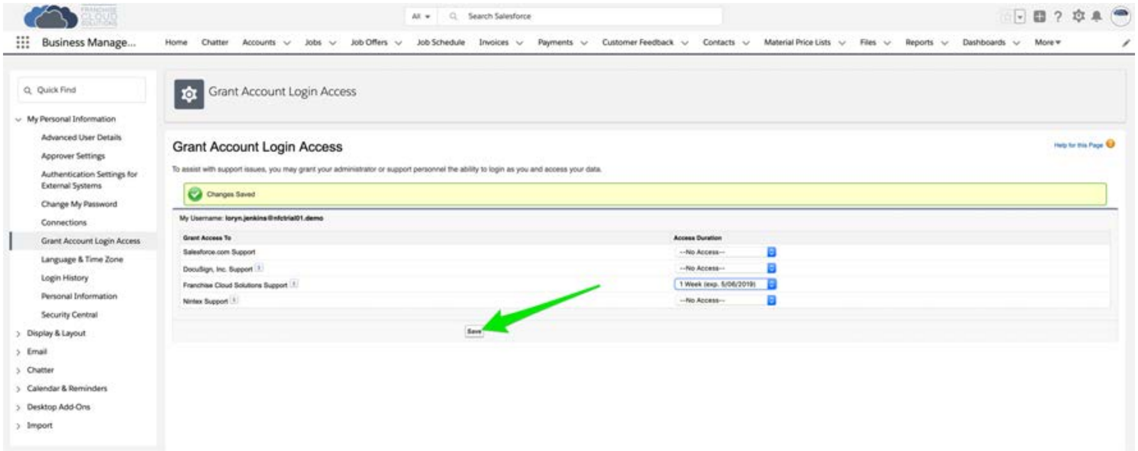
1. Select your account **Settings**.



2. Select the **Grant Account Login Access** page. Then select an appropriate **Access Duration** from the **Franchise Cloud Solutions Support** user.



3. Press **Save**. Our support team will be able to access the system during the period of time you have granted.



You can revoke access at any time.