FRANCHISE CLOUD SOLUTIONS

User Guide

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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.

CONTENTS

CHAPTER 4 Working with Expenses

CHAPTER 5 Working with Invoice Runs

CHAPTER 6 Working with Invoices, Payments & Credit Notes

CHAPTER 7 Xero Integration

CHAPTER 8 Working with Reports

CHAPTER 9 Accessing Help and Support

CHAPTER 1

Getting Started

Introduction

Franchise Cloud Solutions Finance Management is designed especially for the franchise industry. It provides an efficient platform for franchise finance departments to

- maintain an up-to-date schedule of fees for each franchisee
- automate the generation of franchisee invoices, including
  - fixed and royalty-based fees
  - agreed expenses over and above contract fees
- record payments against invoices
- optionally synchronize financial information with external financial systems
- obtain up-to-date reporting on the critical success factors for the business

Finance Management will help any franchisor

- increase administrative efficiency
- reduce errors and omissions
- comply with tax codes
- manage on-going relationships with your franchisees

Finance Management provides the tools you need to efficiently manage your business. Together with other Franchise Cloud Solutions products, your business will have all the IT capabilities it needs to grow and win in the marketplace.

Where to start

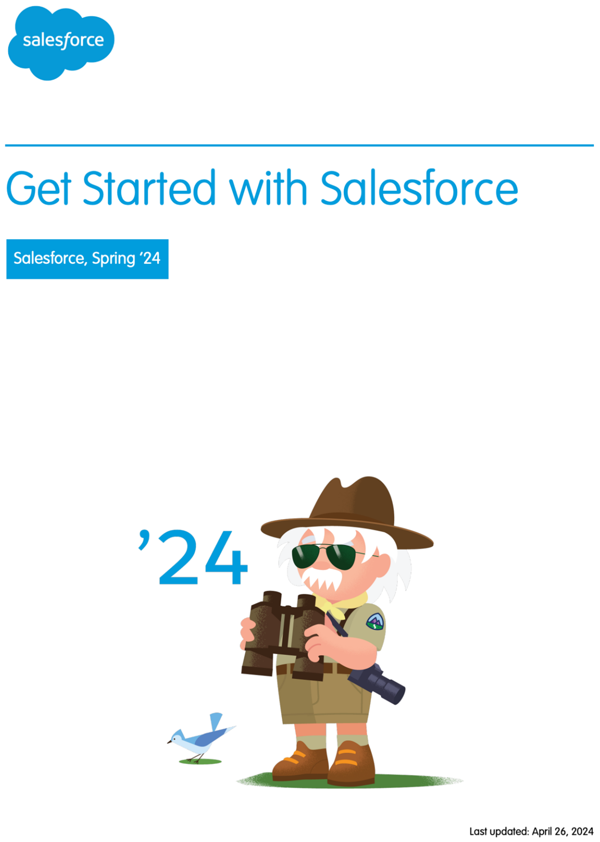
Finance Management is an application especially designed for the franchise industry running within the award-winning and market-leading Salesforce Platform.

This guide explains how to use Finance Management. You can access individual topics in this guide through

- the menu to the left of this page, or
- the search box at the top right of this page,

as shown in the following video.

If you are new to Salesforce, you may benefit from familiarizing yourself with Salesforce basic skills. Refer to the Salesforce User Guide, [Get Started with Salesforce](#).



salesforce

Get Started with Salesforce

Salesforce, Spring '24

'24

Last updated: April 26, 2024

> For more Salesforce user guides, See [Salesforce Downloadable User Guides](#).

Where to start

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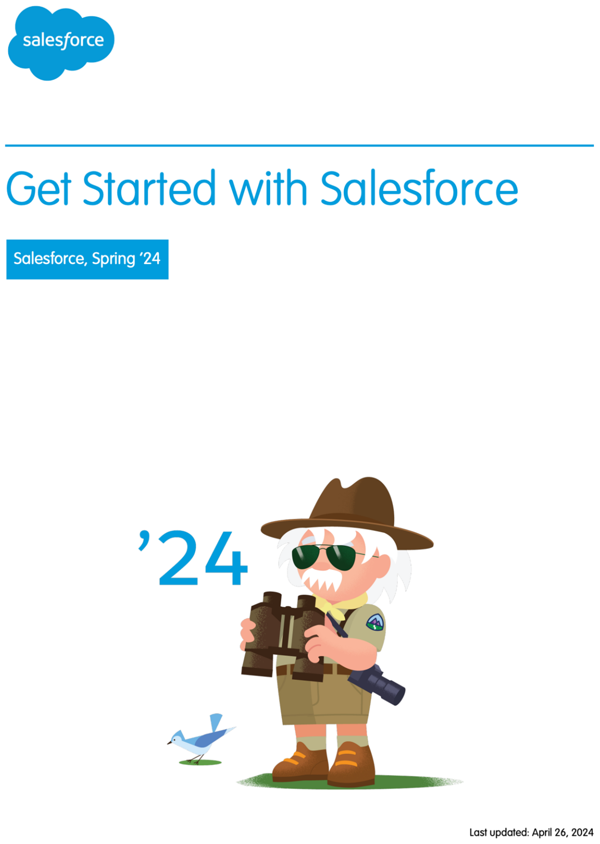

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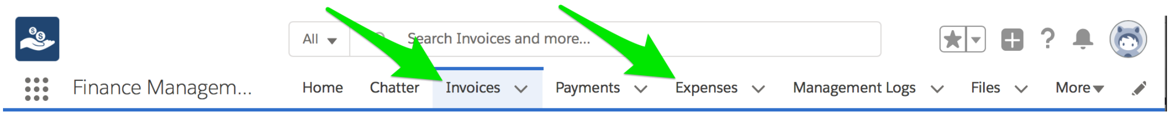
How Salesforce organizes information

Salesforce organizes data into different types of records. Each type of record is stored together.

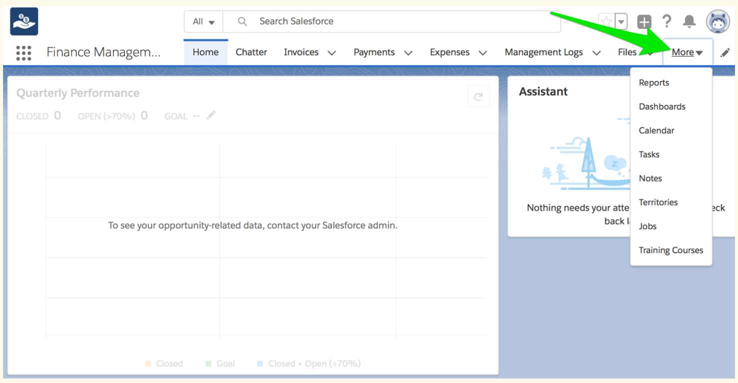
> All invoices are stored in the list of **Invoices**. All expenses are stored in the list of **Expenses**, etc.

The Salesforce menu provides you access to each different type of record.



Clicking on any of these menus shows you a list of records of this type.

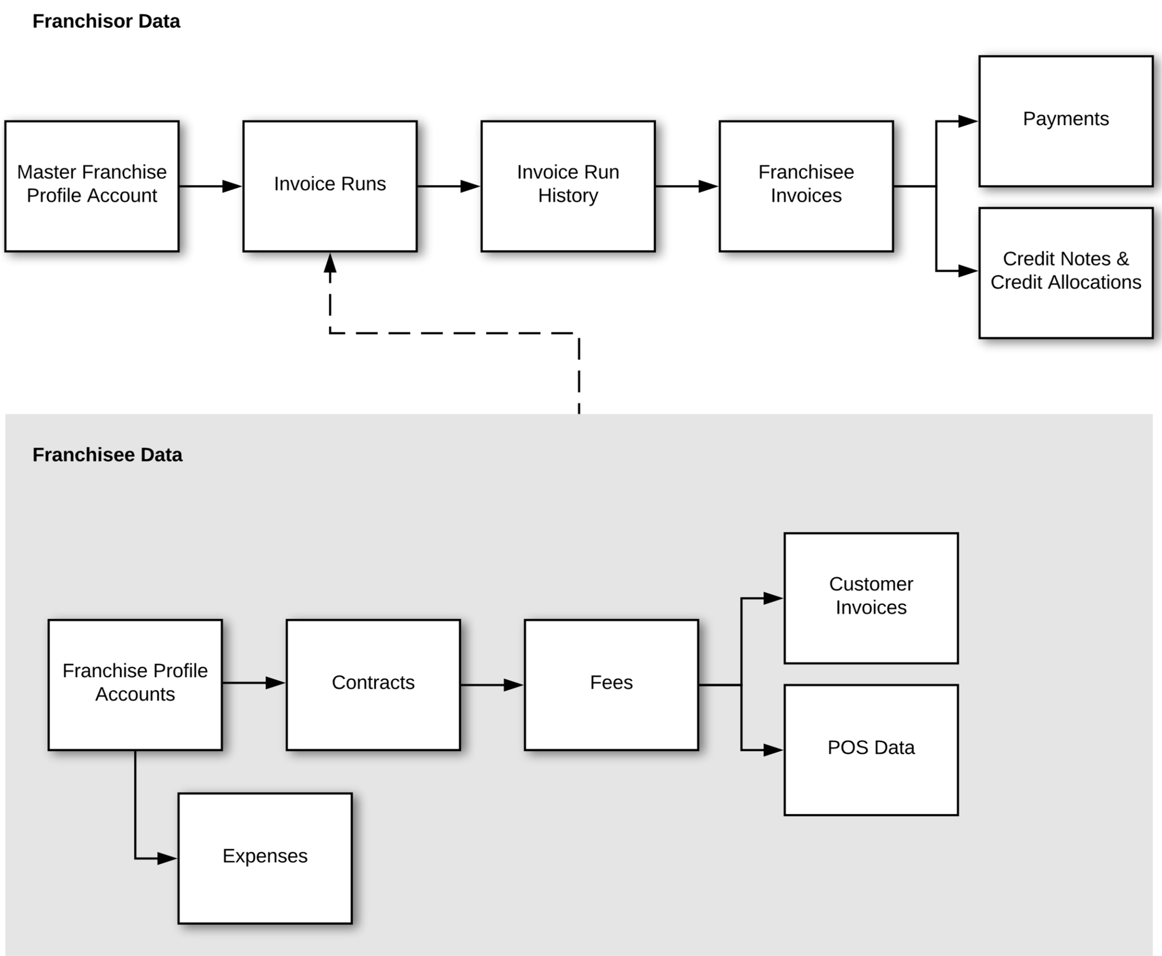
> There are likely more menus than can fit on your screen. You can find the rest of the menus under the **More** link.



Overview

Finance Management works by creating records that allow you to capture information and store statuses. Records provide access to a variety of operations, some of which create new records.

The core records within Finance Management are illustrated below, and described in the following table.



Record	Description
Master Franchise Profile Account	The core record that defines the master franchisor's business.
Invoice Runs	An Invoice Run record defines a regular, periodic invoice generation process. Invoices are generated by reading Expenses attached to the Franchise Profile Account and Fees attached to the Franchise Profile Account's Contract. Invoices and POS Data may be used for Fee calculations.

Record	Description
Invoice Run History	The list of invoices generated within a single Invoice Run, together with details such as when and who ran the Invoice Run.
Franchisee Invoices	Invoices issued by the franchisor to the franchisee. Invoices may be automatically generated through Invoice Runs or be created manually.
Payments	A record of the franchisee's payment of an invoice.
Credit Notes	You can use a Credit Note to issue a discount to a franchisee. Credit Notes work together with Credit Allocations to allocate credit to one or more invoices.
Franchisee Profile Account	The core record that defines each individual franchise business.
Contract	An active Contract represents the current contract with the franchisee. Contracts contain fee records that appear in generated contracts and are read by Invoice Runs for automated creation of periodic invoices.
Fee	Contract Fees define the on-going, periodic fixed and royalty-based fees payable by the franchisee.
Expense	Expenses are used to recover incidental business expenses such as additional local advertising campaigns. An expense can be charged to a franchise either as a once off payment or as one of a fixed series of payments. An expense is ideally inserted by the person responsible for making the agreement with the franchisee.
Customer Invoices	Invoices issued by the franchisee to their customers form an optional source for royalty-based fee payments.
POS Data	POS receipts generated by the franchisee on receipt of customer payments is an optional source for royalty-based fee payments.

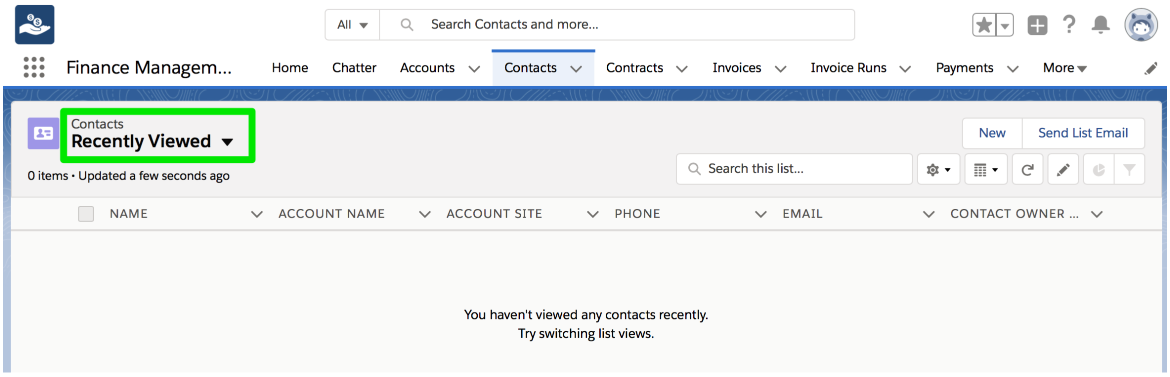
Franchise Profile Accounts, Franchisee Invoices, Payments, Credit Notes and Credit Allocations can optionally be sent to and synchronized from external financial systems.

How to browse information 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.

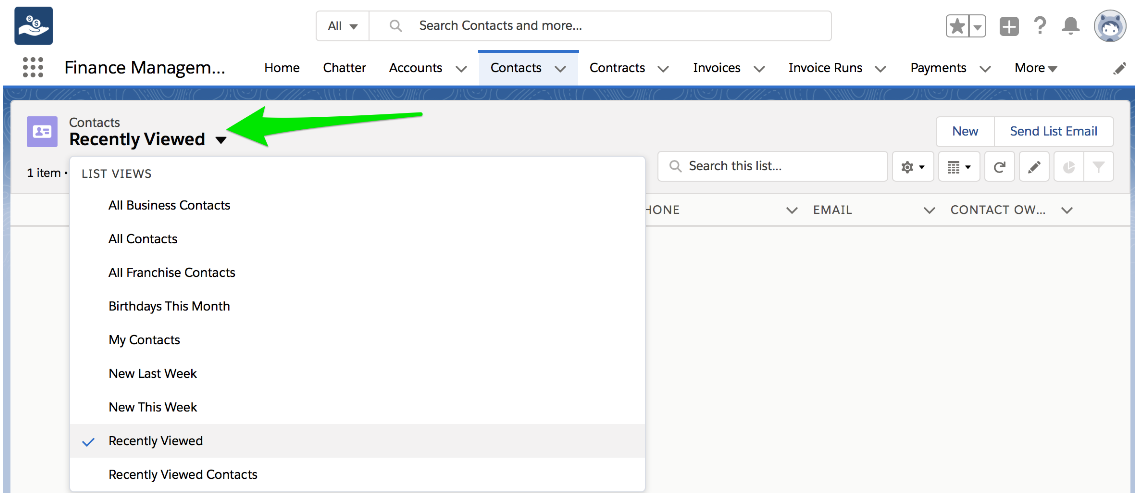
When you first open a menu, the first List View you see is likely to show you an empty list. Salesforce is showing you things you have viewed recently. This is known as the **Recently Viewed** List View.



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

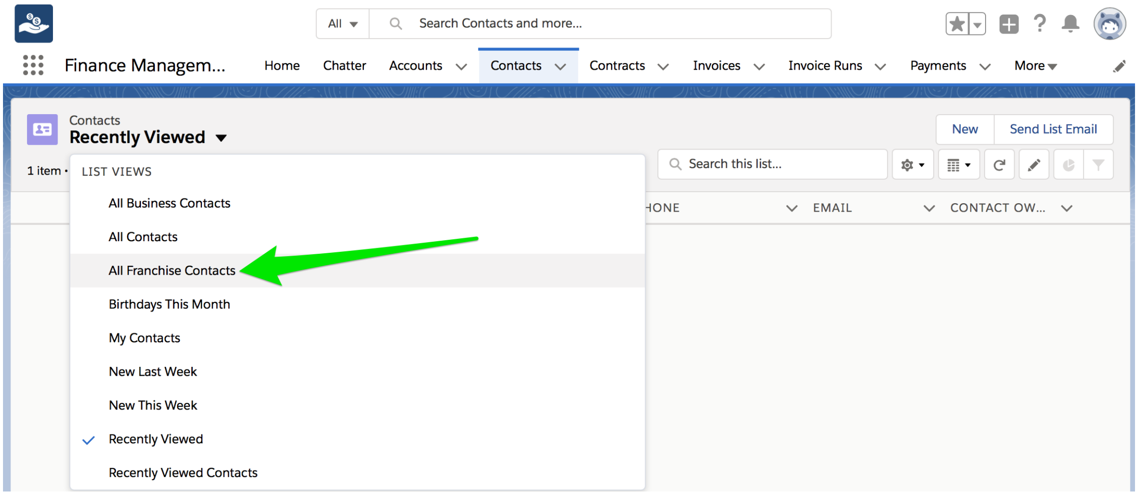
To see some data

1. Click on **Recently Viewed**.



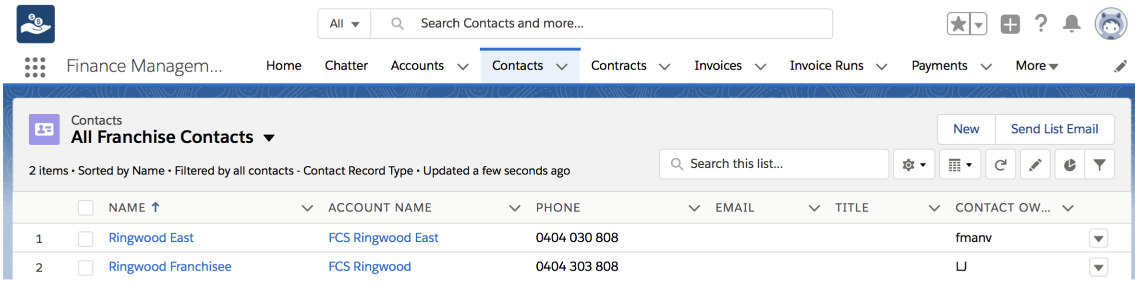
"Recently Viewed" is the name of a list that shows items you have viewed recently. Now that you have clicked on it, you can see the names of other lists.

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

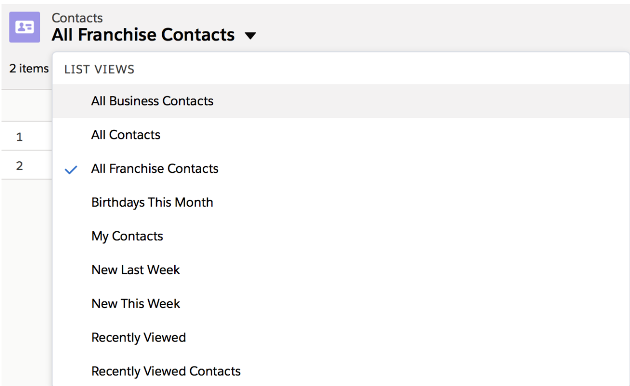


If there is data in your system, this list is likely to show it.

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

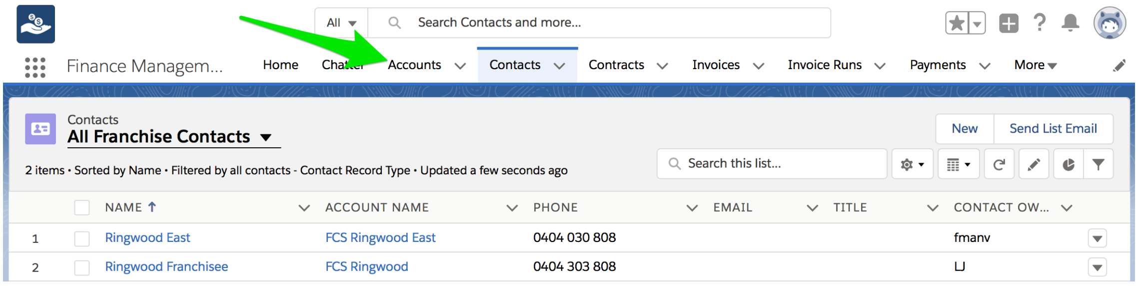


4. Now re-open the list view and notice the different types of views.



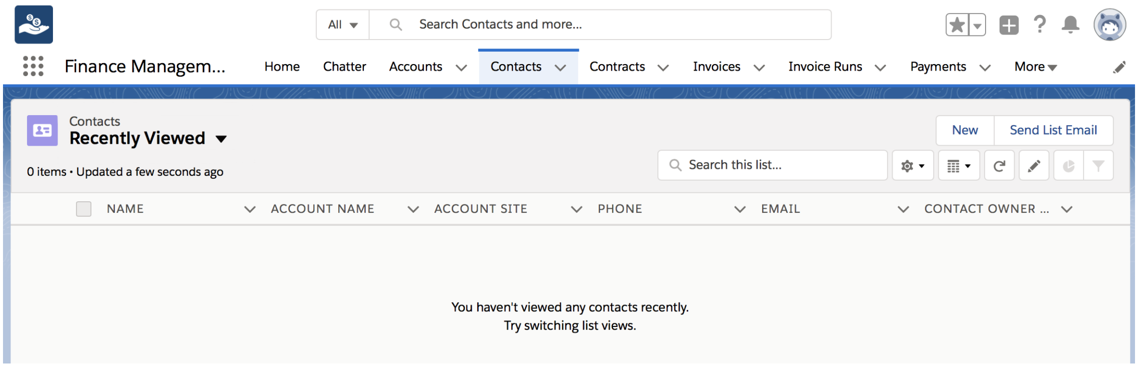
Each list potentially contains a different subset of records. Salesforce uses list views to make the amount of data you can see manageable.

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, Finance 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 business customers.
	Individual Accounts	The list of potential franchisees (related to your business entity) and individual and household customers (owned by franchisees).
	Franchise Profile Accounts	The list of Franchise Profile Accounts. These are the entities operating the licensed franchise territories. Each Franchise Profile Account belongs to a Master Franchise Profile.
	Employment Candidate Accounts	Any accounts representing potential employees.
	Master Franchise Profile Accounts	The list of accounts representing Master Franchisor entities. Each Master Franchise Profile contains a list of Franchise Profile Accounts and Territories belonging to it.
Contacts	All Business Contacts	Records representing individuals that are attached to business customers of your franchisees.
	All Franchise Contacts	Records representing individuals that are attached to Franchise Profile Accounts. These typically represent franchisees, potential franchisees, their business associates and employees.
Contracts	All Activated Contracts	Contracts that are activated.
	All Draft Contracts	Contracts that are draft.
	Expiring Contracts	Contracts that are expiring in the next seven months.
	Expiring Contracts, Notifications Pending	Contracts that are expiring in the next seven months who have been sent a notification.

Record type	List Name	Description
Invoices	Head Office Invoices - Not Sent	Generated invoices that have not yet been sent to franchisees.
	Head Office Invoices - Sent	Generated invoices that have been sent to franchisees.

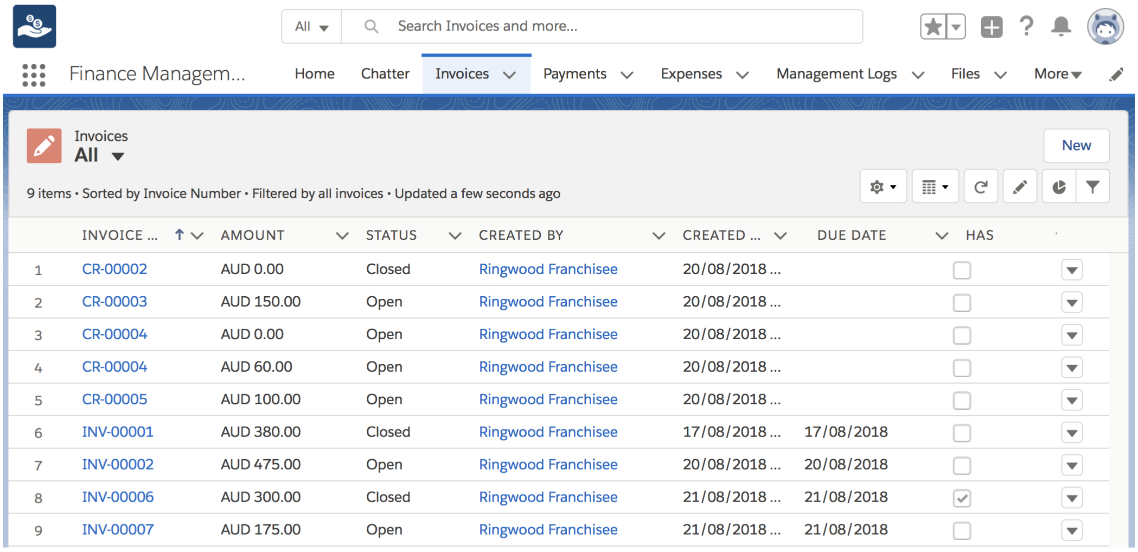
How to customize a list view

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.

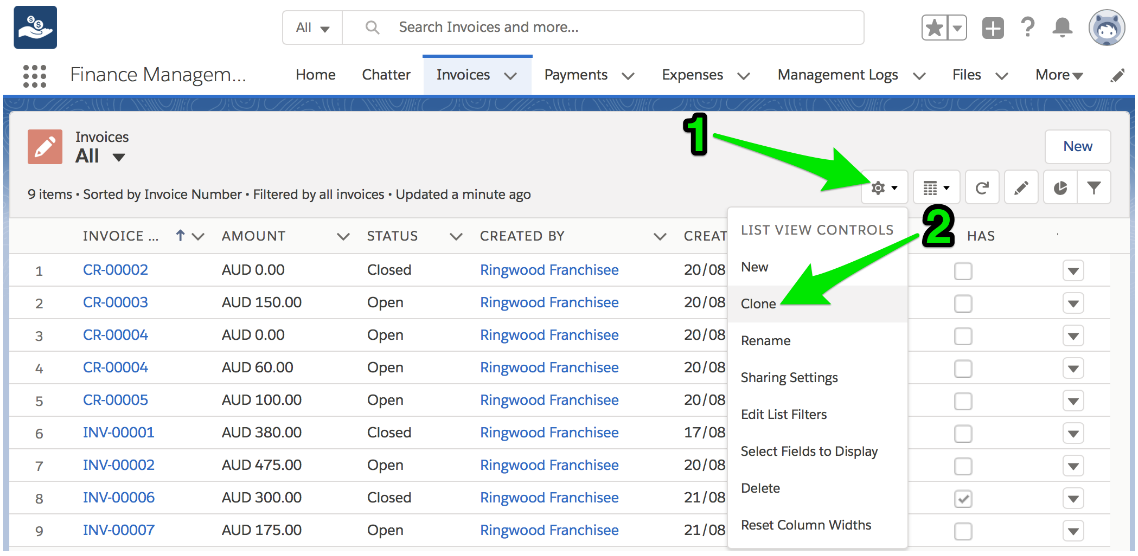
> Imagine you want to see the list of invoices with money outstanding. You could create a list view to show **Invoices with Money Owing**.

To modify an existing list view

1. Select the list view you want to copy.

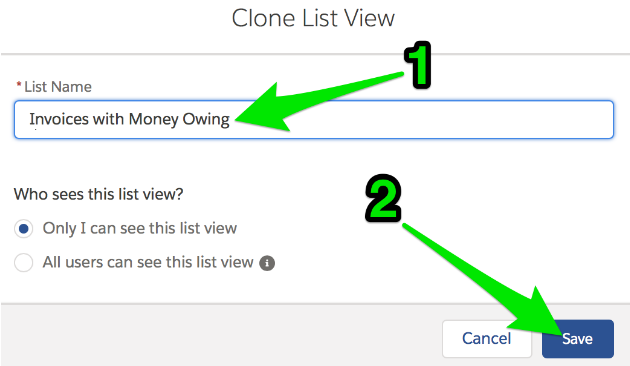


2. Open the **List View Control** and choose **Clone**.



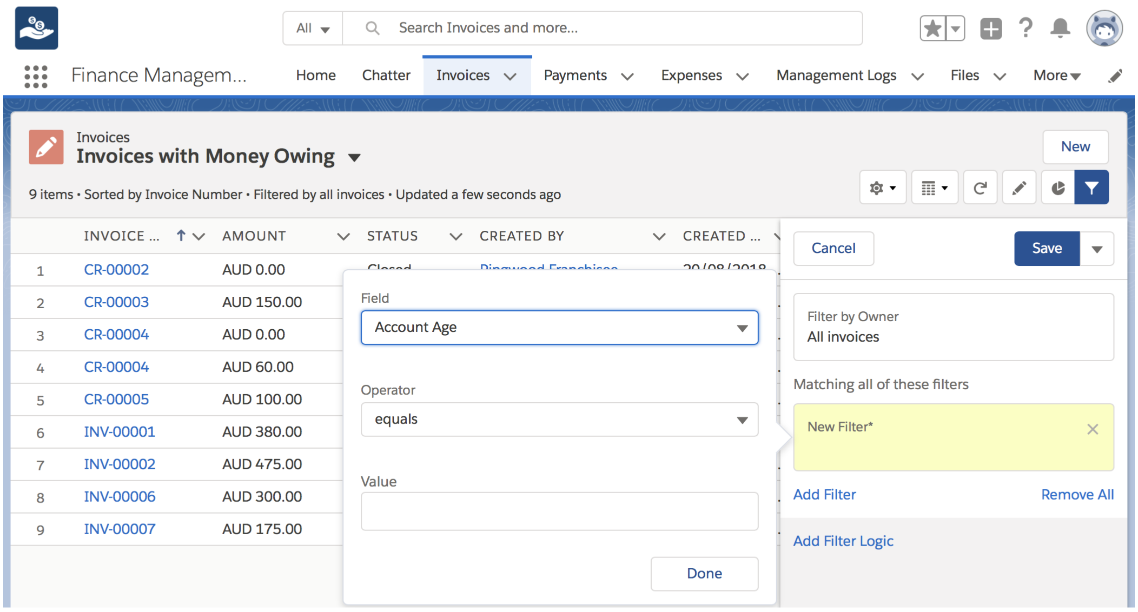
The **Clone List View** dialog box appears.

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

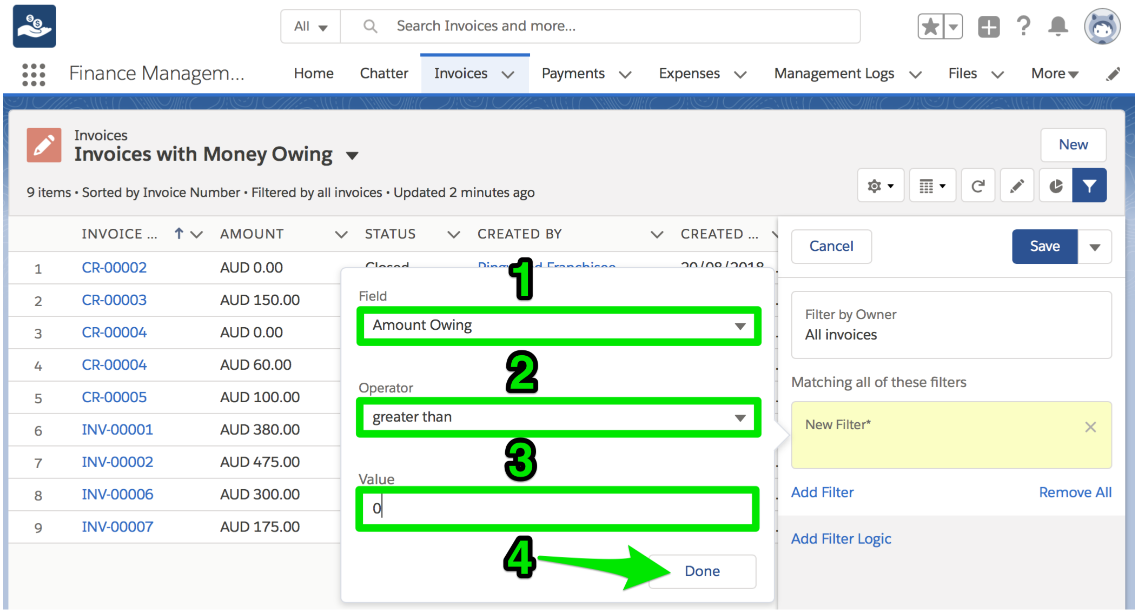


The newly named list view appears together with its filter pane.

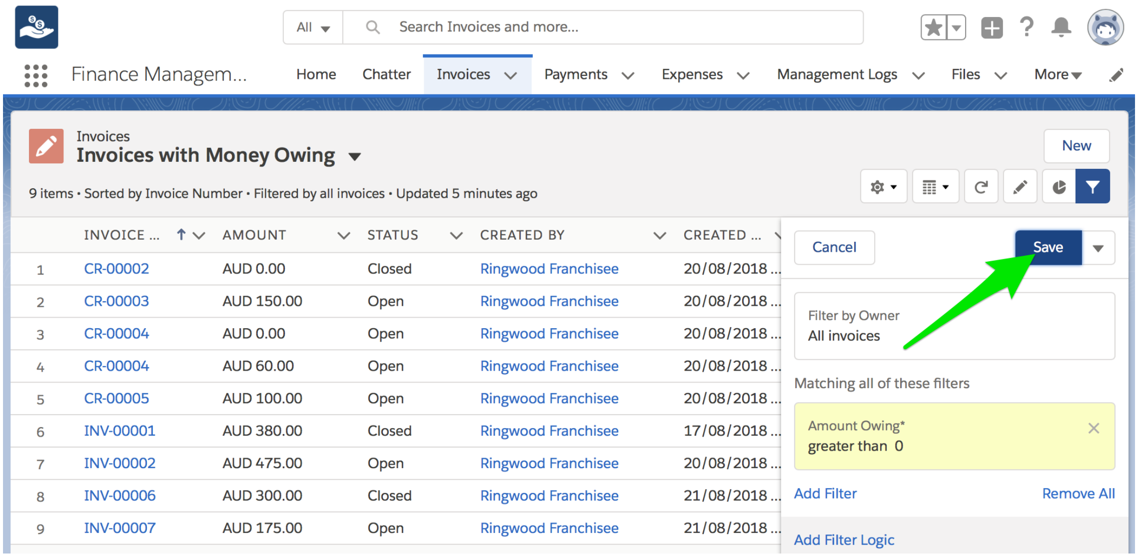
4. Choose the **Add Filter** link to add an extra filter condition.



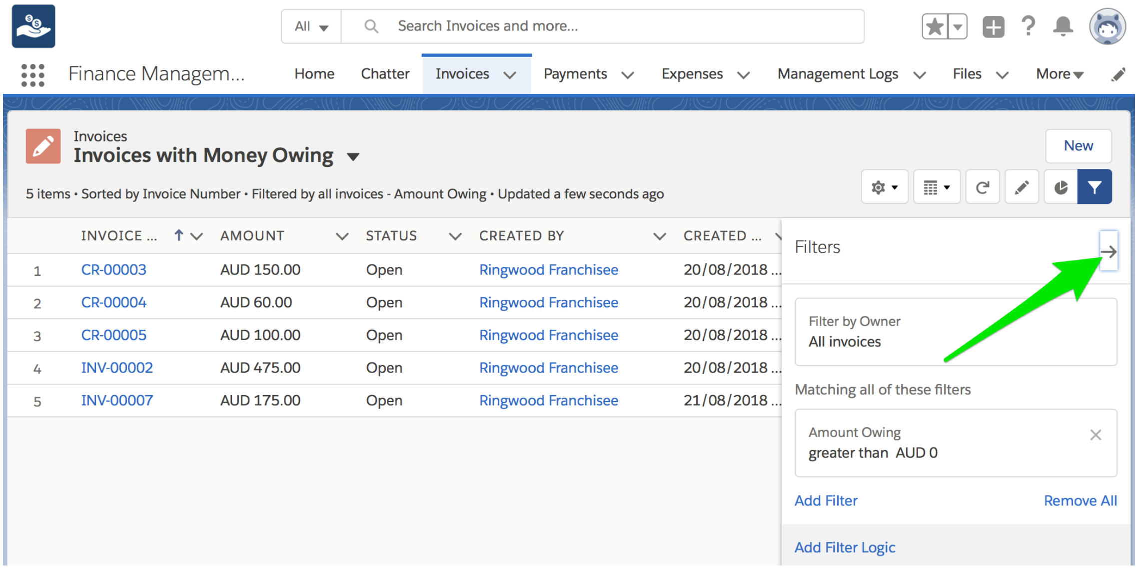
5. Use the `Field`, `Operator` and `Value` fields to set the new condition, then press **Done**.



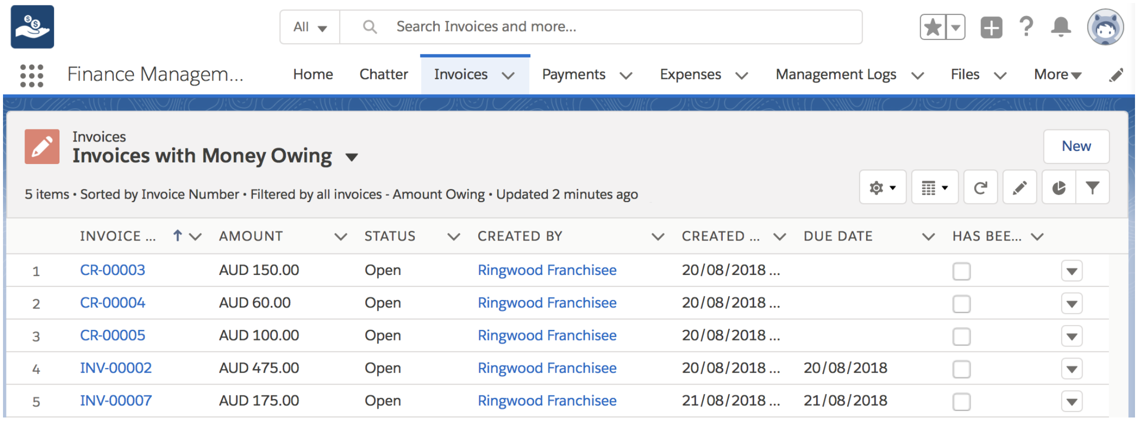
6. Now press **Save**.



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.

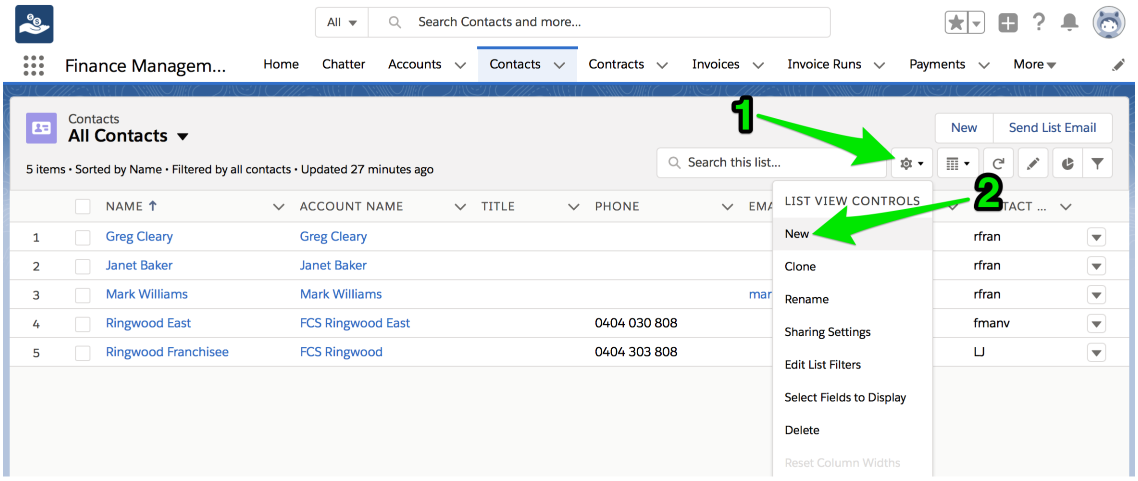
How to create your own list view

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

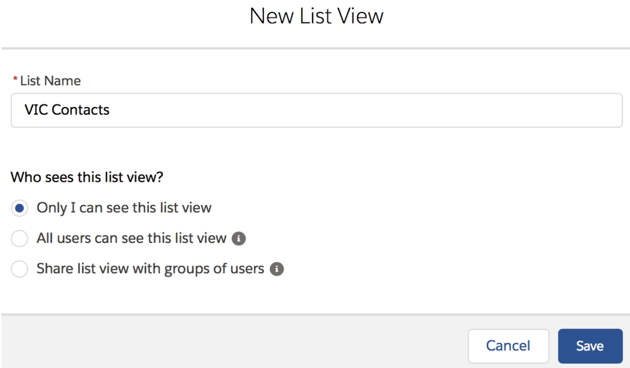
In this example, we're going to create a list view to show us contacts in our State or Territory.

To create a new list view

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

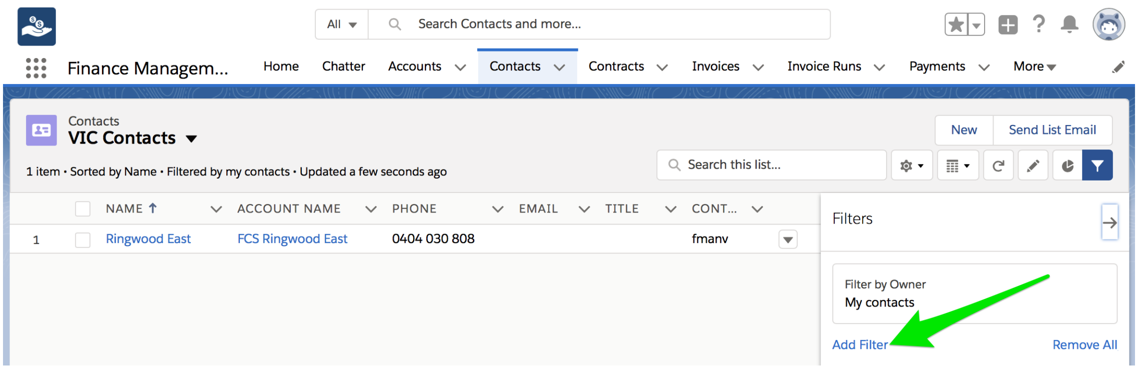


2. Enter the new `List Name` and press **Save**.

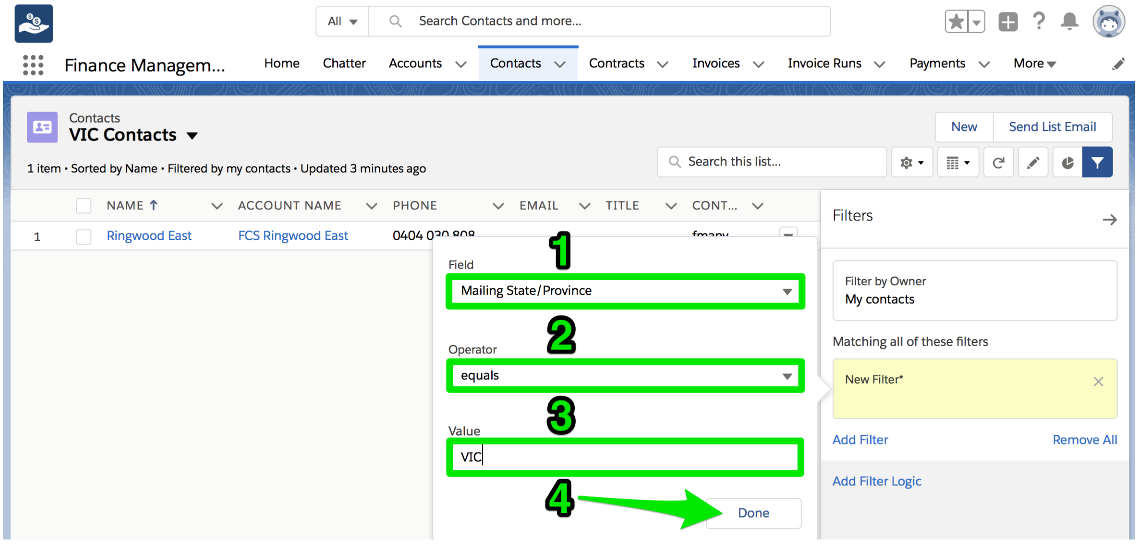


The newly named list view appears together with its filter pane.

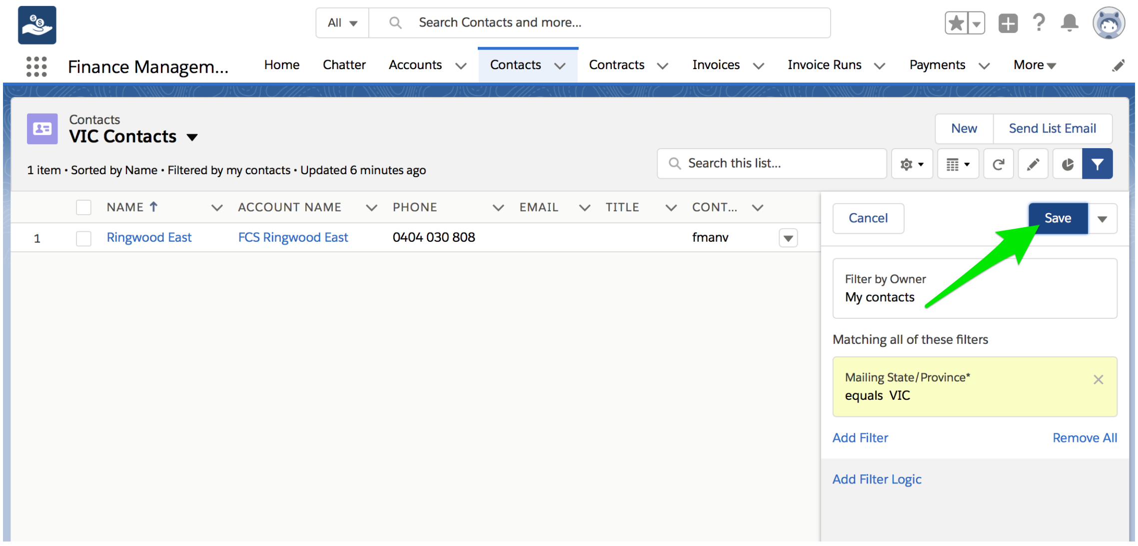
3. Choose the **Add Filter** link to add an extra filter condition.



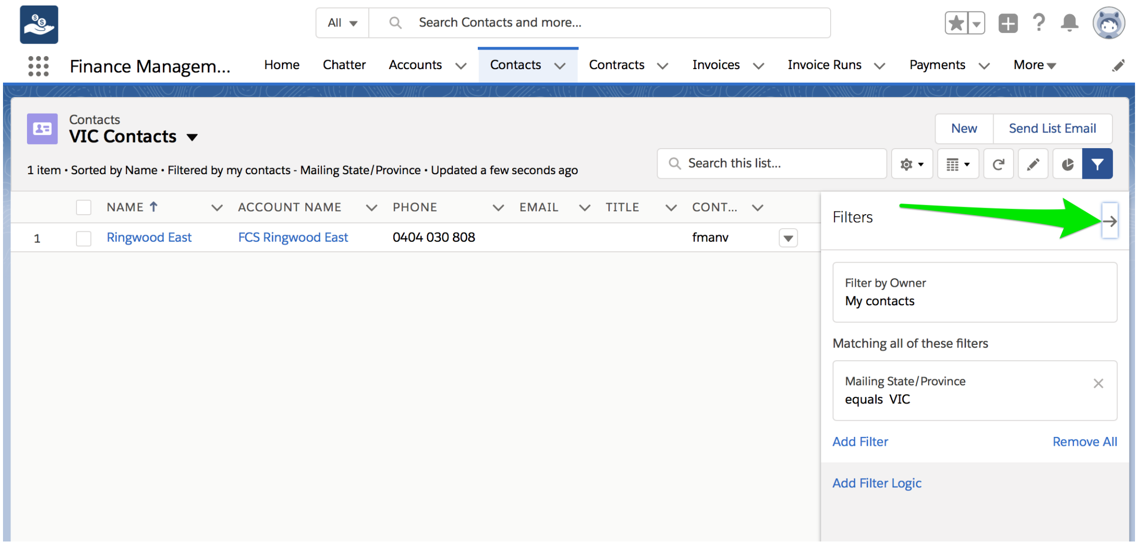
4. Use the `Field`, `Operator` and `Value` fields to set the new condition, then press **Done**.



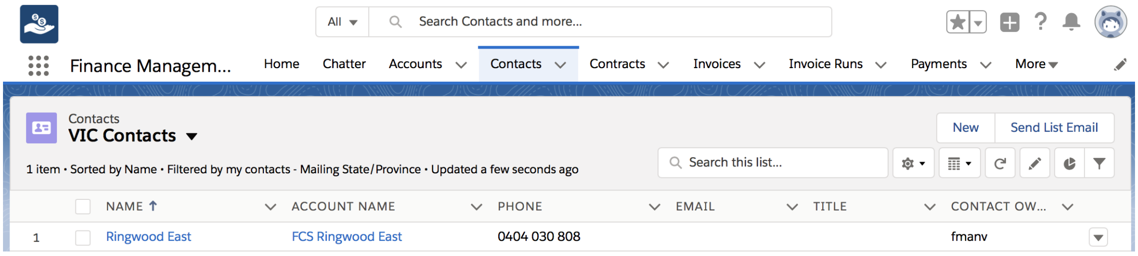
5. Press **Save**.



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



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

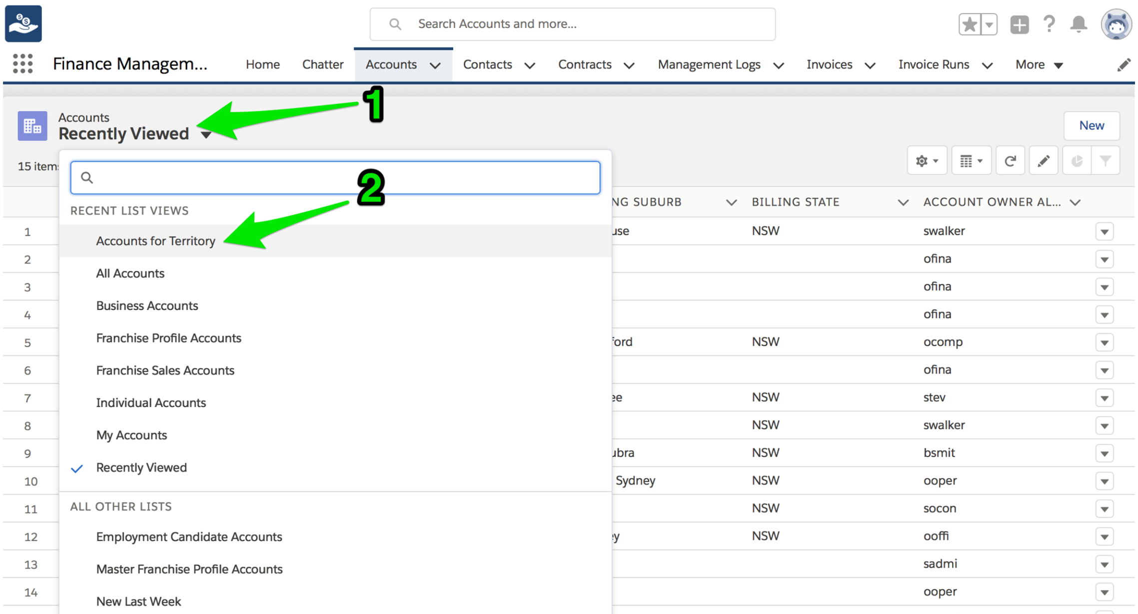


How to add columns to a list view

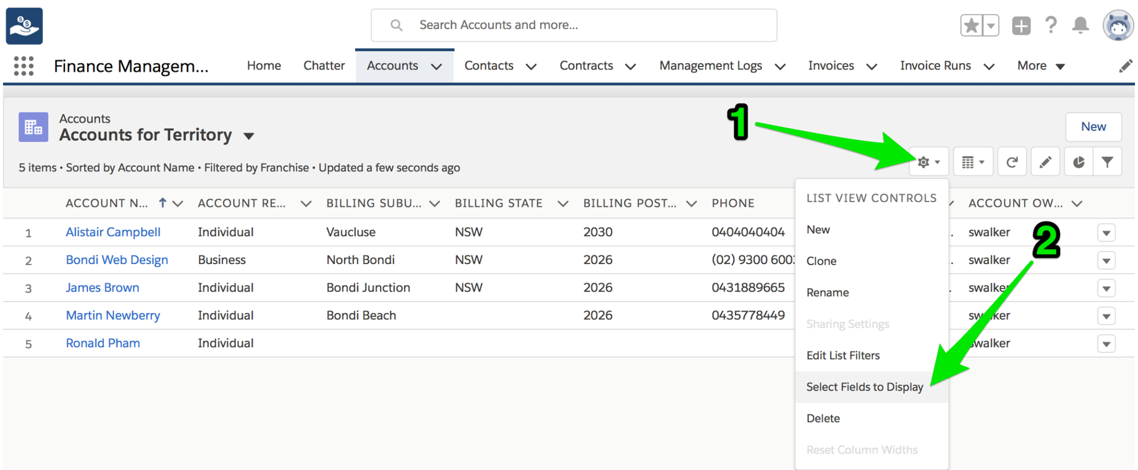
You can add columns to any custom list view.

To add columns to a custom list view

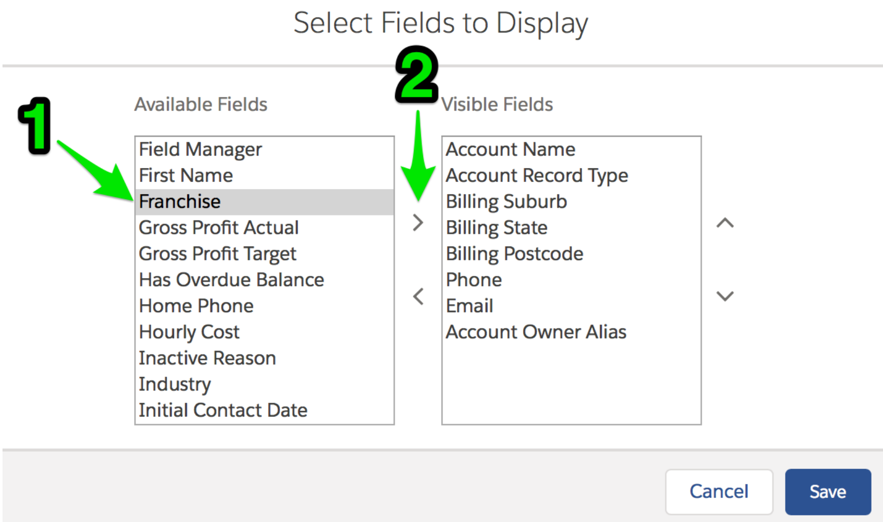
1. From **Recently Viewed**, select a custom list.



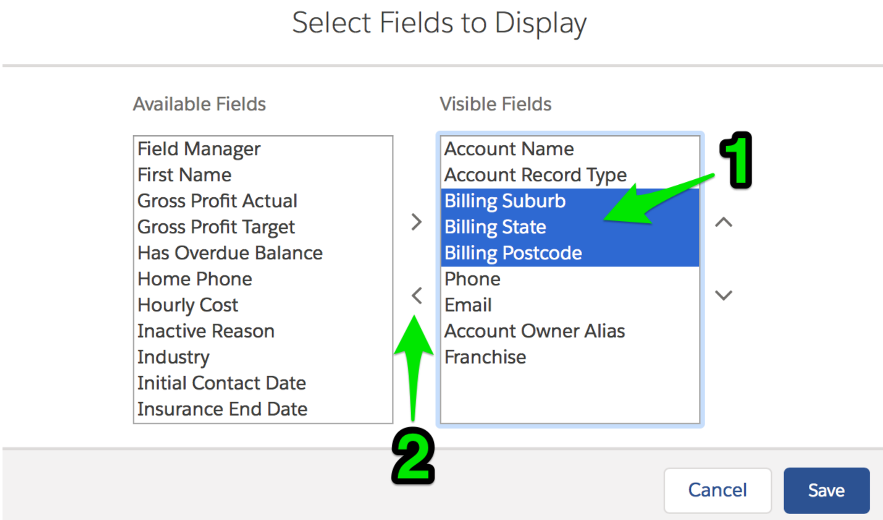
2. Open the **List View Control** and choose **Select Fields to Display**.



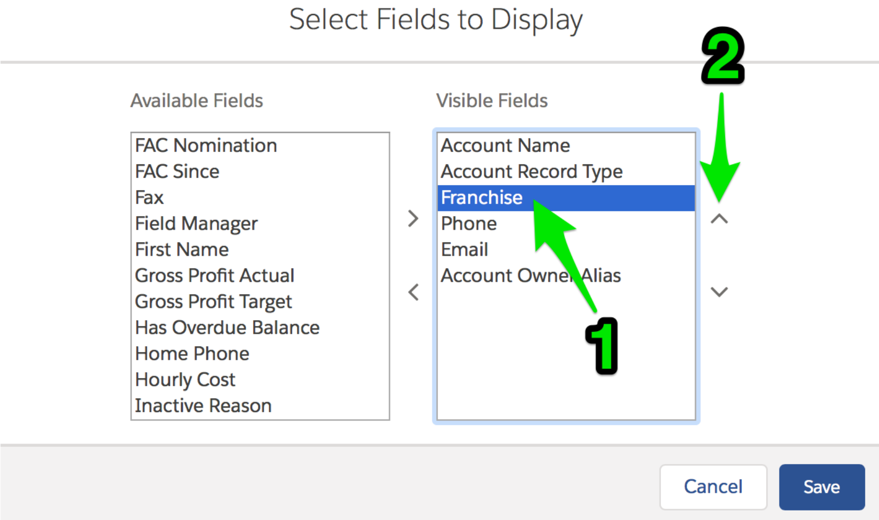
3. From `Available Fields`, select the fields you want to make visible.



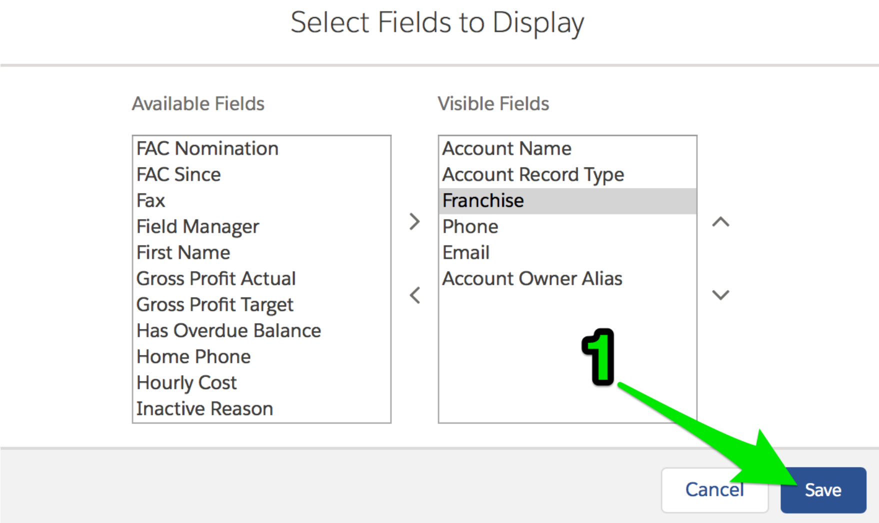
4. Now remove any fields you want not to display.



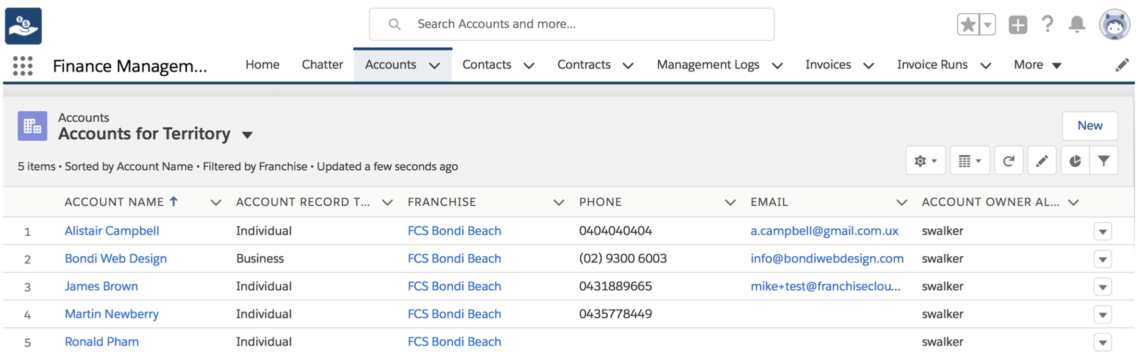
5. Sort the fields into the order you want to see.



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



Now you can see the updated list.

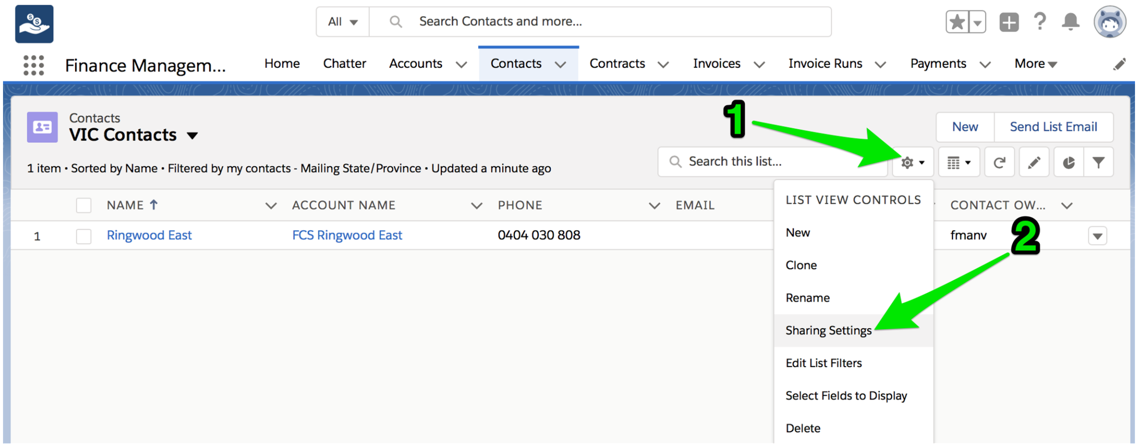


How to share list views

You can share your list views with your colleagues.

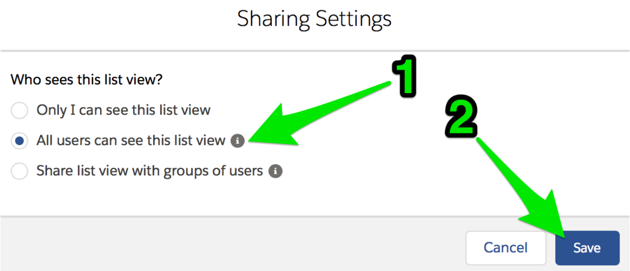
To share a list view

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 2

Working with Contracts

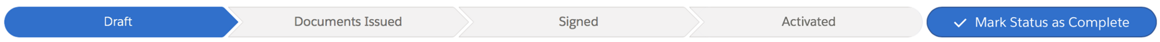
Understanding contracts

Contracts record current and historical fees. They are stored so that they are machine-readable, and are used for invoice calculation. Machine-readable fee records make invoicing a highly efficient and reliable way of generating invoices that are guaranteed to conform to the contract.

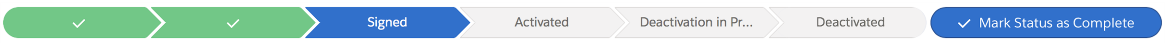
Contract Statuses

Contract statuses provide a convenient way to keep track of the status of each contract. By managing contracts through each status, Finance Management helps you focus on efficiently growing your business.

You can see the status of each contract by looking at the contract status indicator.



Two more statuses become available after signing.



Here is a summary of each contract status.

Draft

When a contract is first created it is placed in the Draft status. The Draft status is where all the relevant details of the contract are entered and edited. The Draft status is complete when it matches the contract you have (or will) provide to the franchisee for consideration.

Documents issued

Documents issued status represents the period when the contract is issued to the franchisee for review and signing. Documents will be generated and sent to the franchisee for consideration during this status.

Signed

Contract signed records the date at which the contract is signed by the franchisee.

> In compliance with the Australian Competition & Consumer Commission Franchising Code of Conduct, there must be fourteen days between the `Documents Issued Date` and the `Customer Signed Date`.

Activated

Signed contracts will automatically activate when the commencement date is reached.

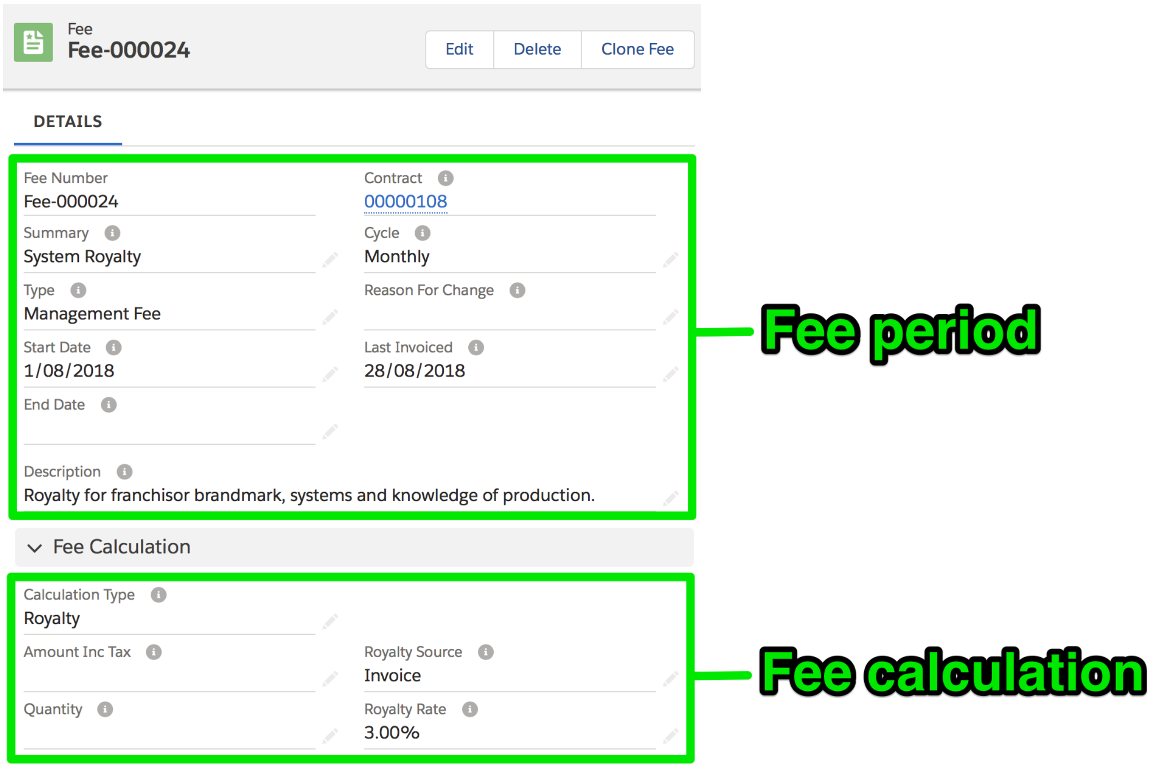
Contract fees

Understanding contract fees

In Finance Management, contracts contain fee records. Fee records are used to document financial aspects of the contractual agreement with a franchisee. They are also used to calculate fees for inclusion on periodic invoices. Generating invoices using contract fees saves labor, increases accuracy and allows Finance Management to maintain records of all invoiced fees for compliance purposes.

Each fee record specifies two types of information

- Fee period– the start date, end date and cycle at which the fee is charged
- Fee calculation – how a fee is calculated each time it is invoiced

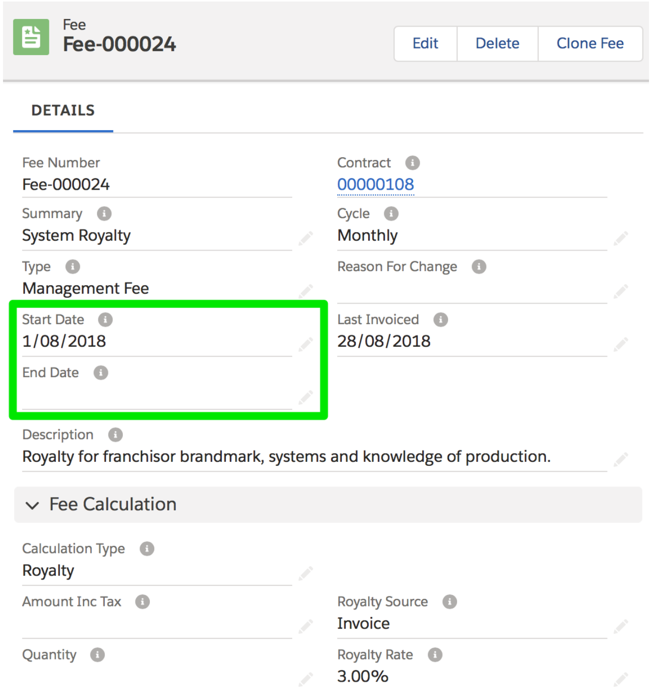


Fee periods

Fee periods define how often a fee is collected within the given duration. The duration is defined by the start and end dates, and the frequency is defined by the selected cycle.

Start and End Dates

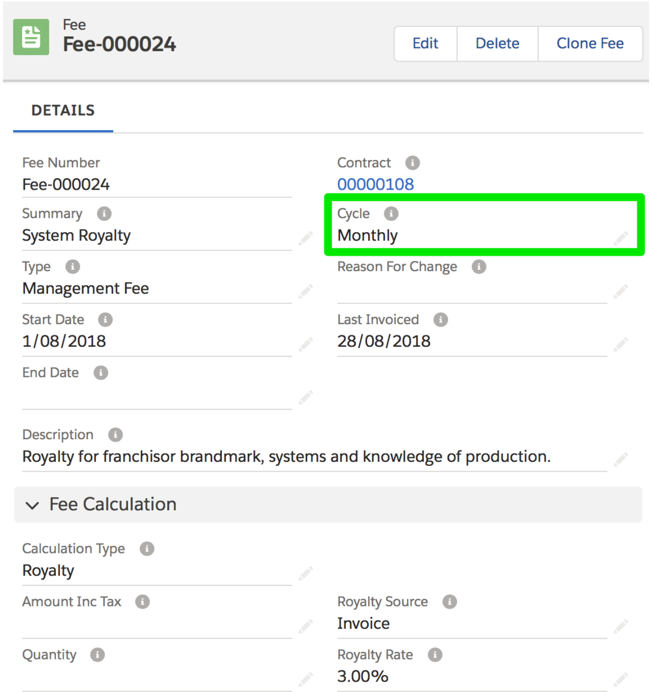
The period over which fees are charged begin at the date specified by `Start Date`. Setting an `End Date` is optional. When there is no `End Date`, the fee will be charged in every successive cycle until the contract is deactivated. When you do set `End Date`, this fee will not be charged after the specified date.



> When you perform annual fee adjustments for CPI increases, it is useful to set the expiring fee's `End Date` and to create a new fee record to represent the adjusted fee value. That way you maintain a record of the value of all fees that have been charged under that contract.

Cycles

Each fee has a specified cycle.



Available cycles are

- Daily
- Weekly
- Fortnightly (every second week)
- Monthly
- Quarterly
- Annually

Using different cycles for different fees allows you the flexibility of charging fees at different frequencies.

For example, a contract may use a fixed annual fee, a monthly fee based on invoices, and a weekly fee based on POS receipts.

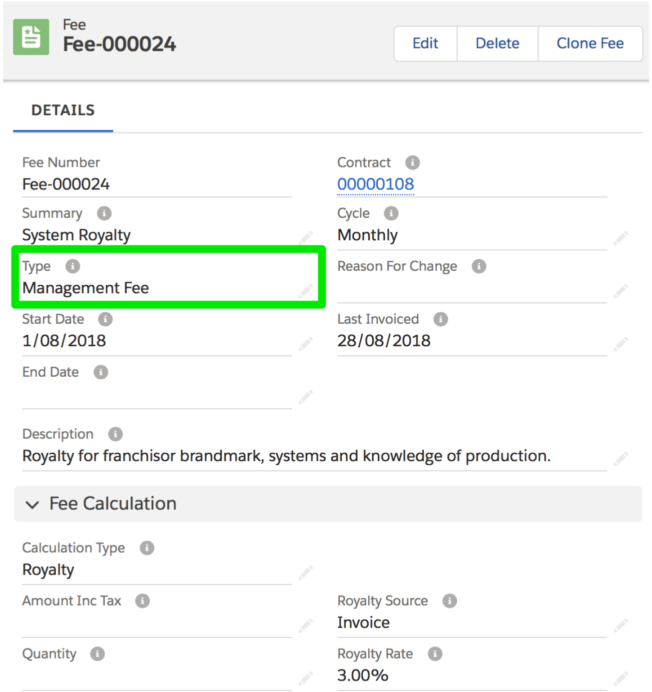
You will need at least one Invoice Run for each different cycle set on the fees. *See* "Working with Invoice Runs" on page 63.

Fee types

Some franchisors issue multiple monthly invoices.

For example, they may issue management fees on the first of the month and POS-based royalties on the fifteenth day of the month.

To enable multiple invoices to be issued using the same cycle, Finance Management allows you distinguish fees of one type from another.



When you are constructing an Invoice Run, you can choose to select specific types of fees into the run. Typical examples of fee types are management fees, software subscriptions, advertising and communications levies.

The fee type will often also appear on the generated invoice beside the fee name in order to help franchisees understand what the fee is for.

Fee calculations

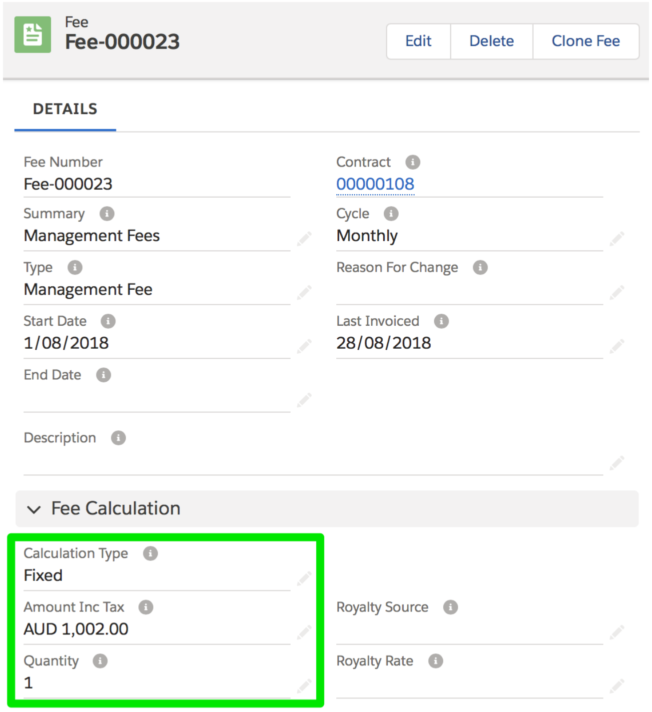
Fee calculations describe the way in which fees are calculated every invoice cycle. There are two types of fee calculations

» Fixed fees – fees that levy specific dollar amounts

» Royalties – fees that are levied in proportion to invoice or POS values

Fixed fees

Fixed fees represent concrete dollar amounts. When you complete a fixed fee, you need to specify that the `Calculation Type` is *Fixed*, the value of the `Amount Inc Tax`, and the `Quantity`.



`Quantity` allows you to treat the `Amount Inc Tax` as if it represents a package.

> For example, you might offer your franchisees “advertising packages,” where the franchisee may select additional packages. Where a franchisee selects two package units, you can enter the `Quantity` as *2* in order to double the amount charged for this particular fee.

> The per unit `Amount Inc Tax`, `Quantity` and calculated sub-total usually all display on the franchisee invoice, depending on the configuration of your invoice template.

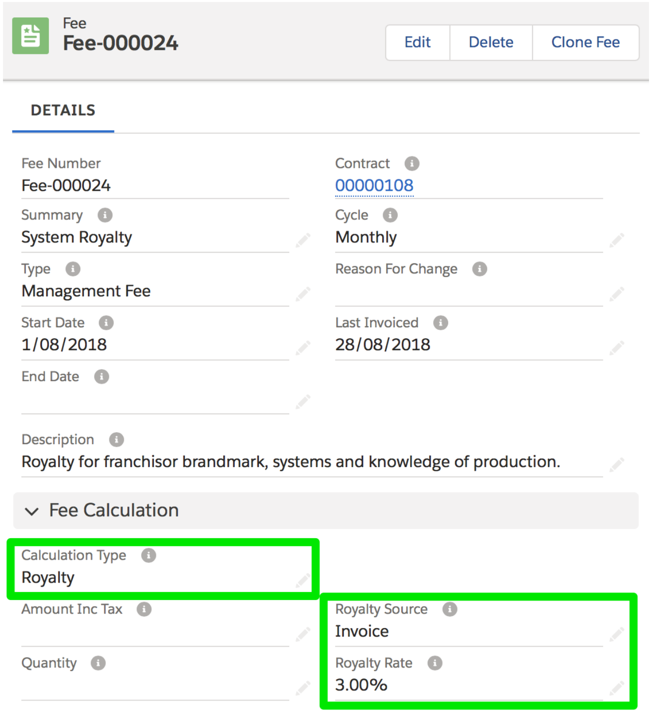
Royalty fees

Royalty fees represent fees that vary in proportion to a measure of business activity. Available measures include

- Invoice – the value of invoices issued in the given period
- POS – the value of POS transactions in the given period

> POS data is imported into Finance Management from a POS data provider.

When you complete a royalty fee, you need to specify that the `Calculation Type` is *Royalty*, the `Royalty Source` is either *Invoice* or *POS*, and the `Rate` is set to a percentage value.

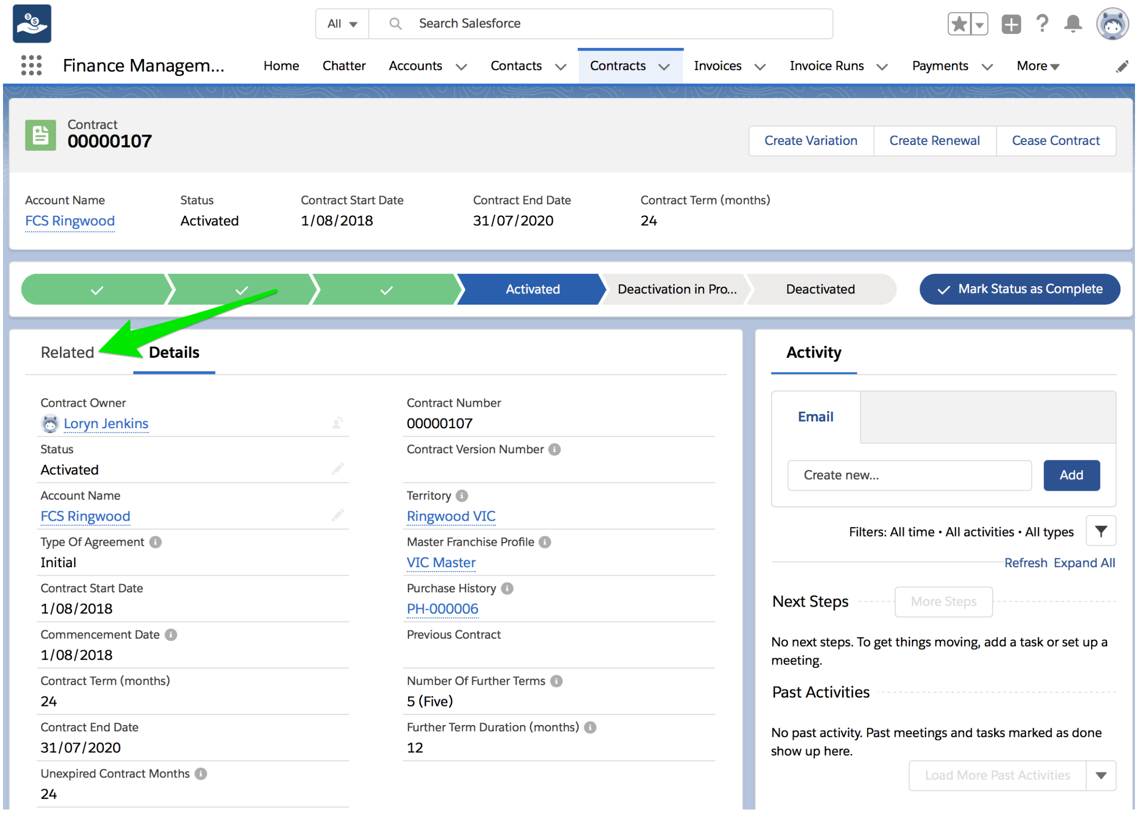

Fee
Fee-000024
Edit
Delete
Clone Fee
DETAILS
Fee Number
Fee-000024
Contract
00000108
Summary
System Royalty
Cycle
Monthly
Type
Management Fee
Reason For Change
Start Date
1/08/2018
Last Invoiced
28/08/2018
End Date
Description
Royalty for franchisor brandmark, systems and knowledge of production.
Fee Calculation
Calculation Type
Royalty
Amount Inc Tax
Royalty Source
Invoice
Quantity
Royalty Rate
3.00%

How to view all fees on a contract

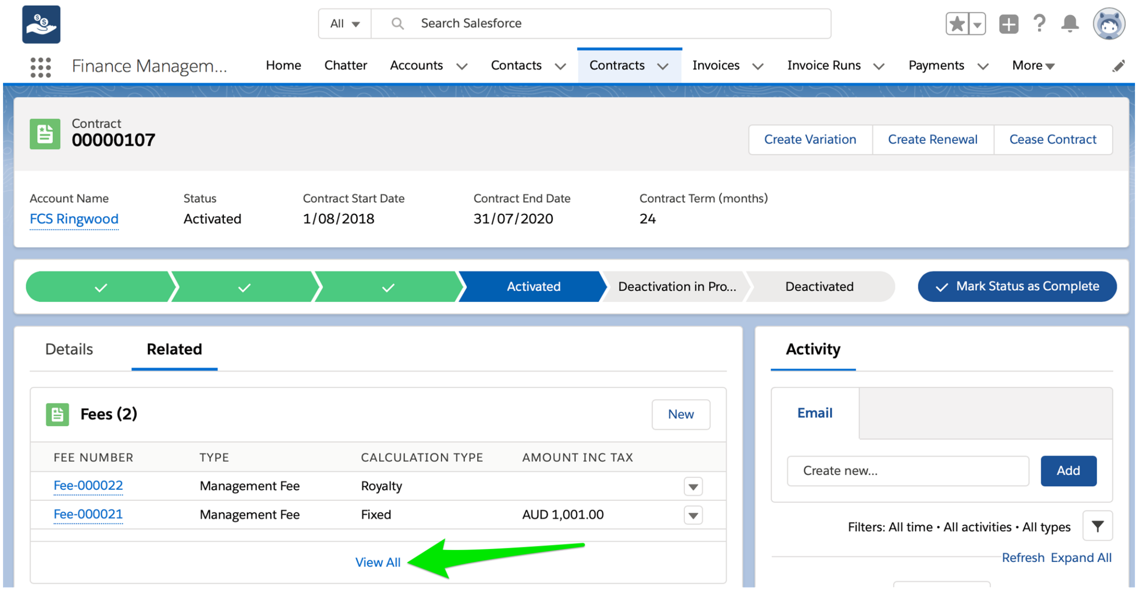
Here is the best way to see all the fees on a contract.

To view all fees on a contract

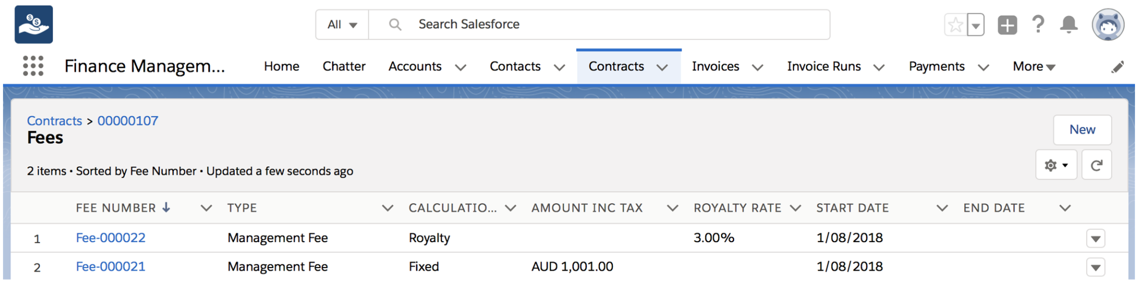
1. From the **Contract**, select the **Related** tab.



2. From the **Fees** section, press **View All**.



The **Fees** list appears with a summary of fee details.



How to add a contract fee

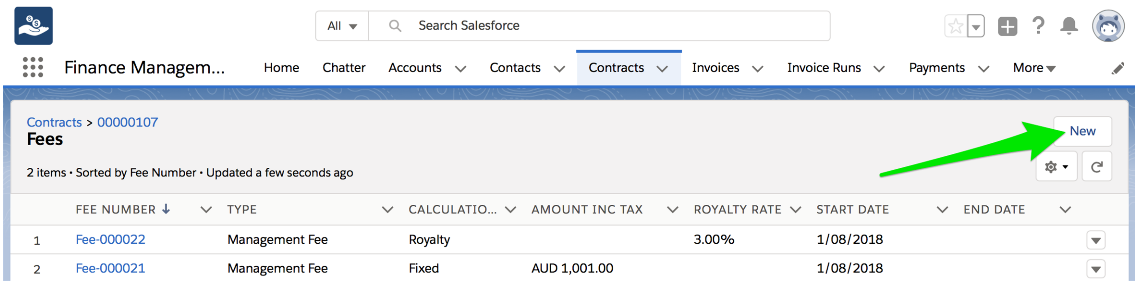
Contract fees are typically added:

- during contract negotiation
- at the conclusion of contract negotiation
- during the operation of the contract as allowed for within the contract terms

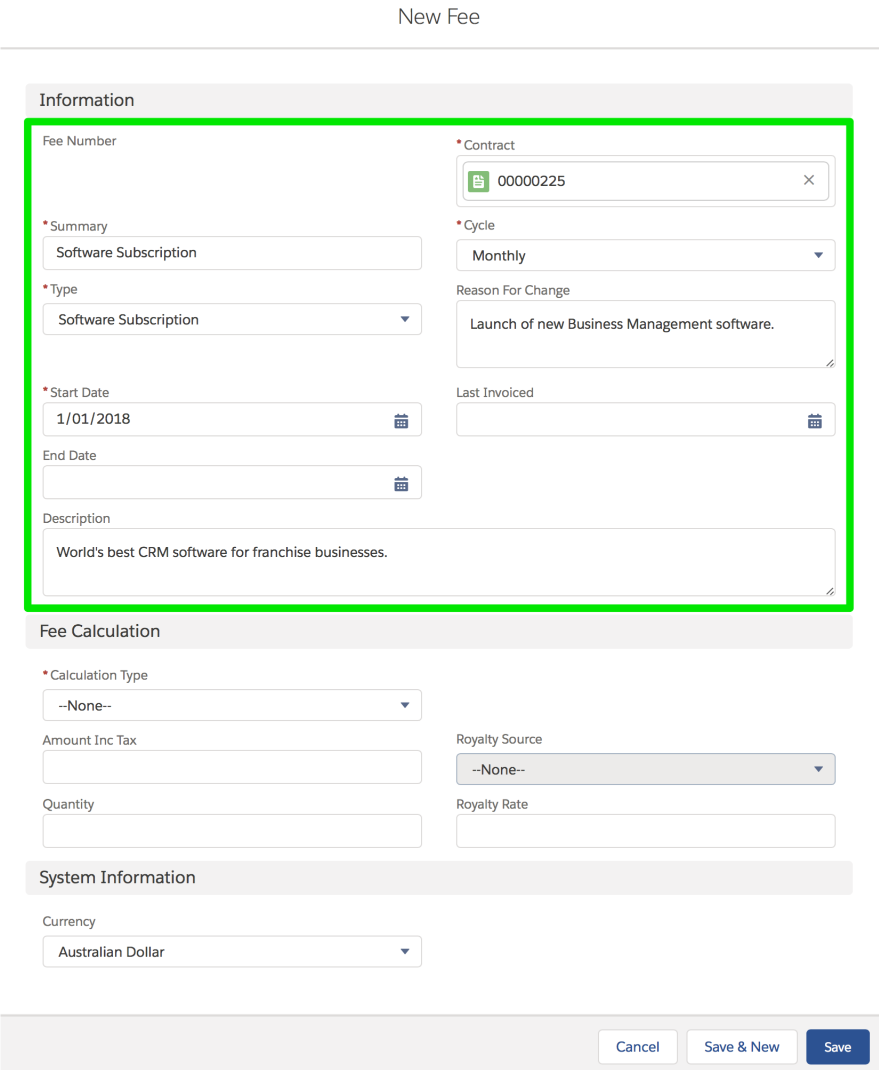
While the system does not monitor changes in the contract fee schedule, any changes after signing not already provided for by the terms of the contract requires signing a variation to the contract. The system does not monitor or flag the need for variations based on fee changes. Contract variations can be issued using Operations Management. Refer to the Operations Management User Guide for more information.

To add a new fee

1. View all fees on a contract. *See* "How to view all fees on a contract" on page 34.
2. From the **Fees** list, press **New**.



3. In the **New Fee** dialog box, configure the fee information.



> `Cycle` and `Type` can affect which invoice run includes this fee. *See* "Understanding invoice runs" on page 64.

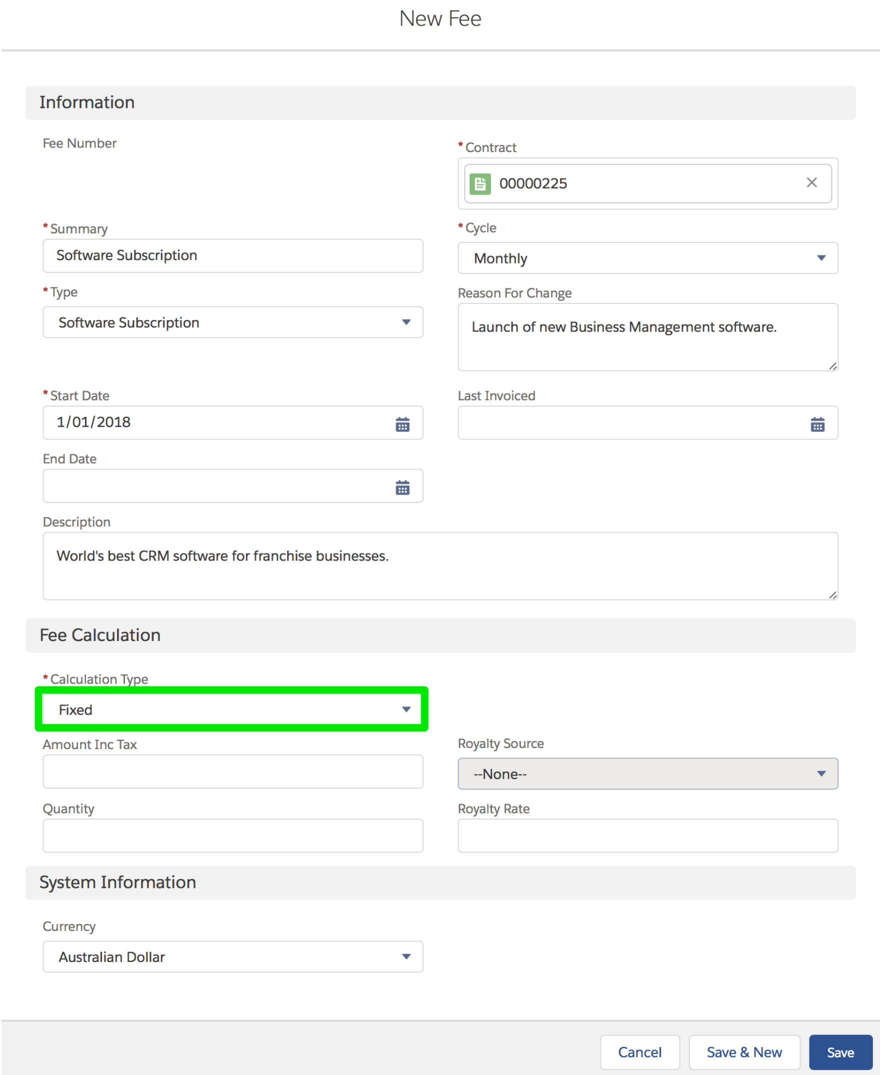
4. Complete the **Fee Calculation**.
   - For a fixed fee, How to configure a fixed fee.
   - For a royalty, How to configure a royalty.
5. When complete, press **Save**.

How to configure a fixed fee

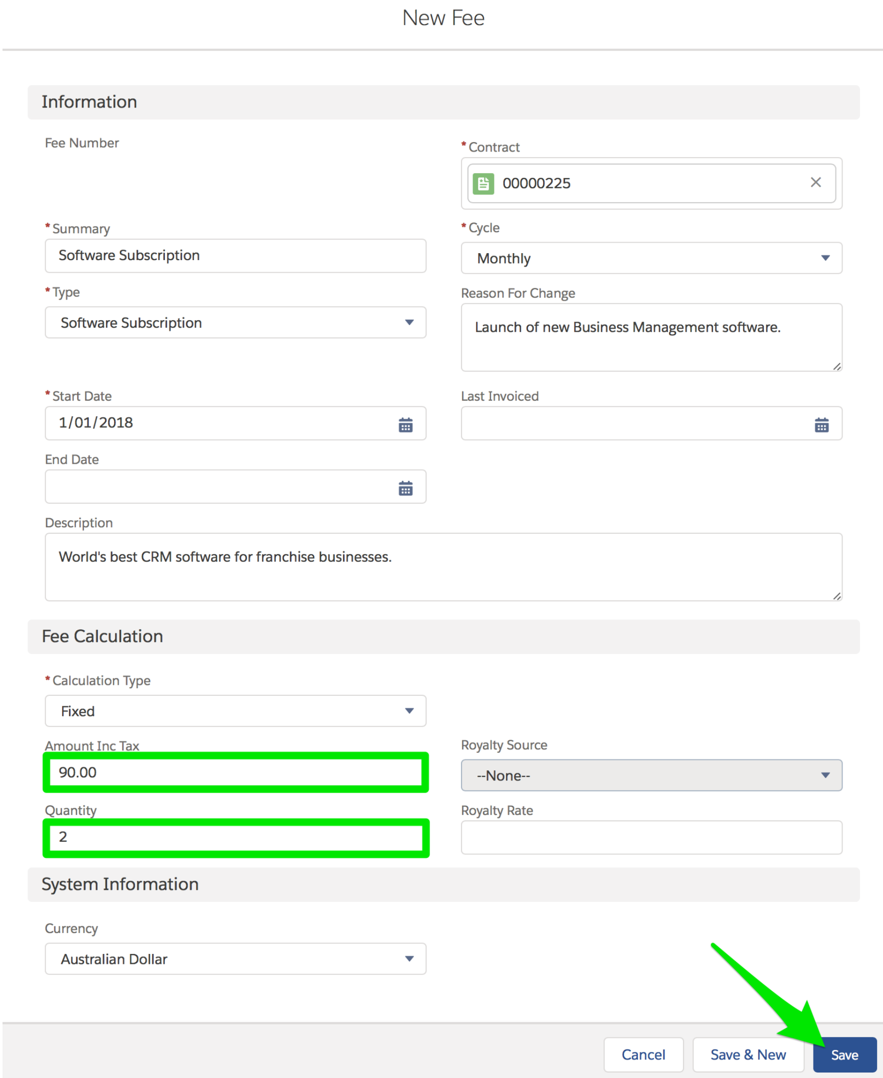
Fixed fees enable you to charge a specified amount per contract cycle.

To configure a fixed fee

1. From the `Calculation Type` field, select *`Fixed`*.



2. Enter the value and quantity of the item.

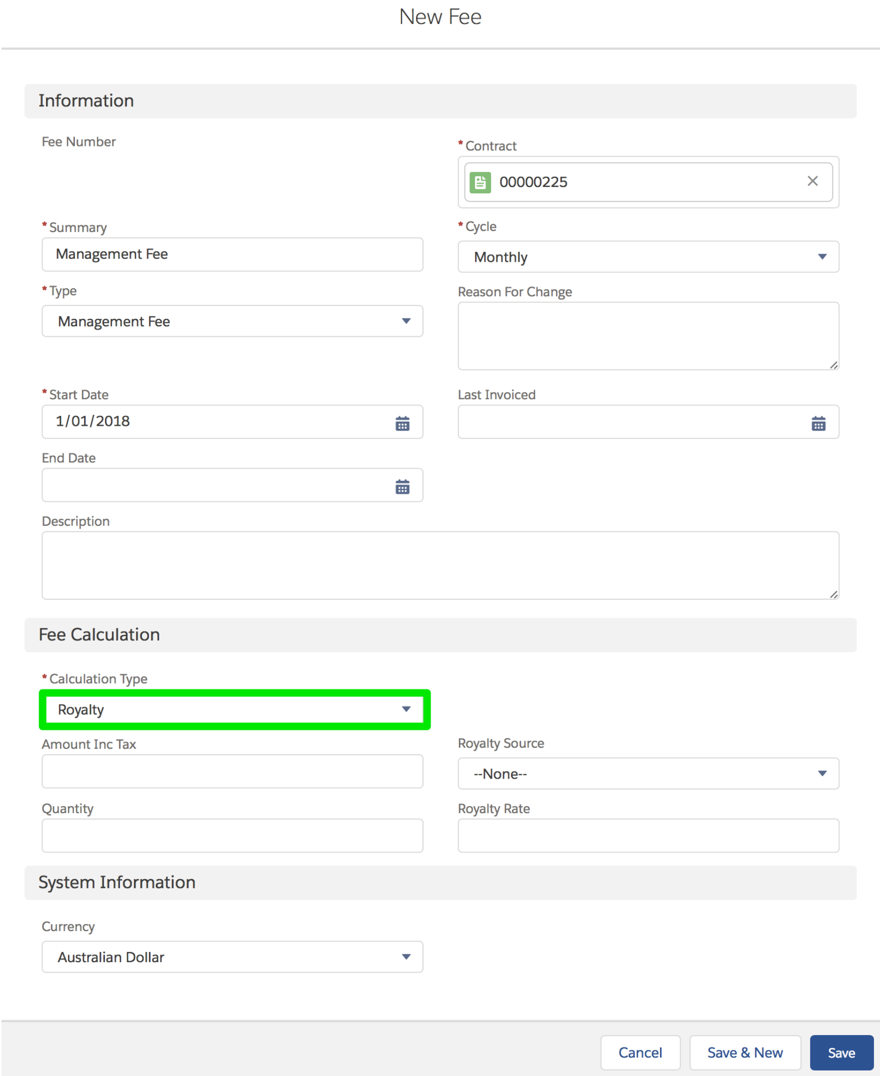


How to configure a royalty

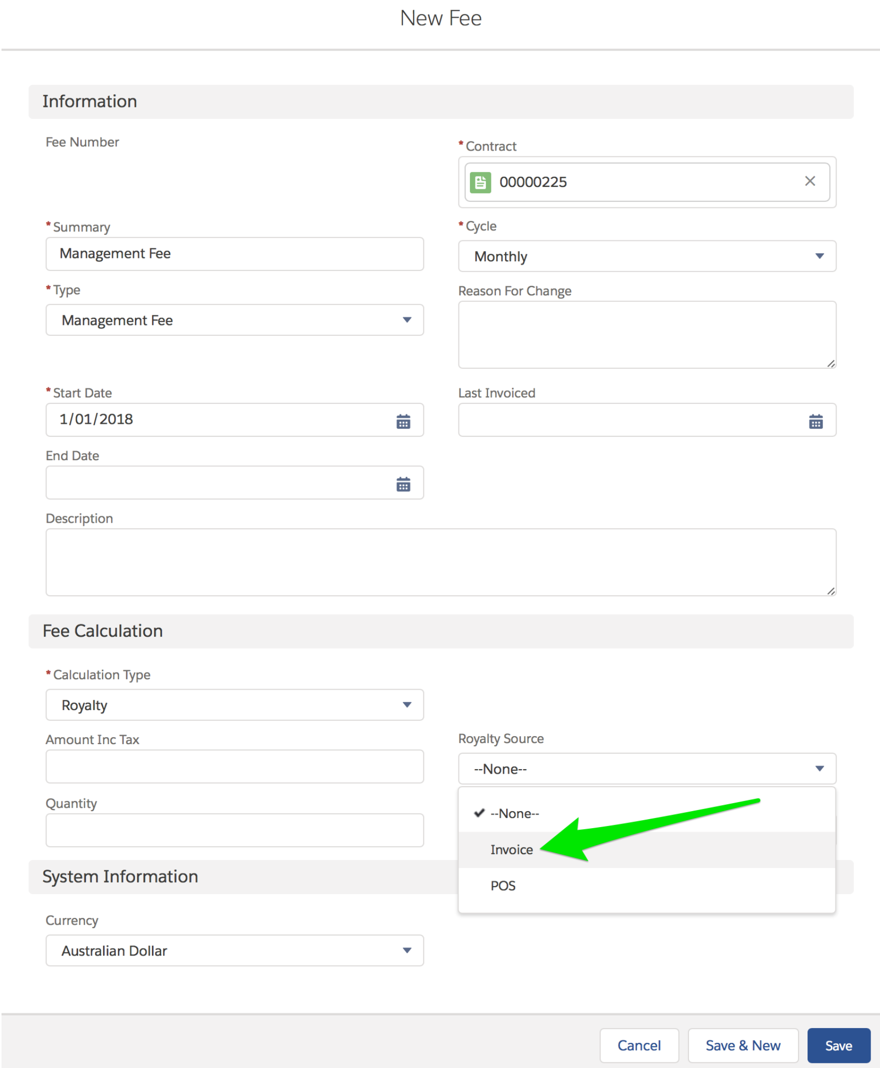
Royalties allow you to charge a percentage of revenue. You can calculate a royalty based on invoices or on data imported from POS records.

To configure a royalty

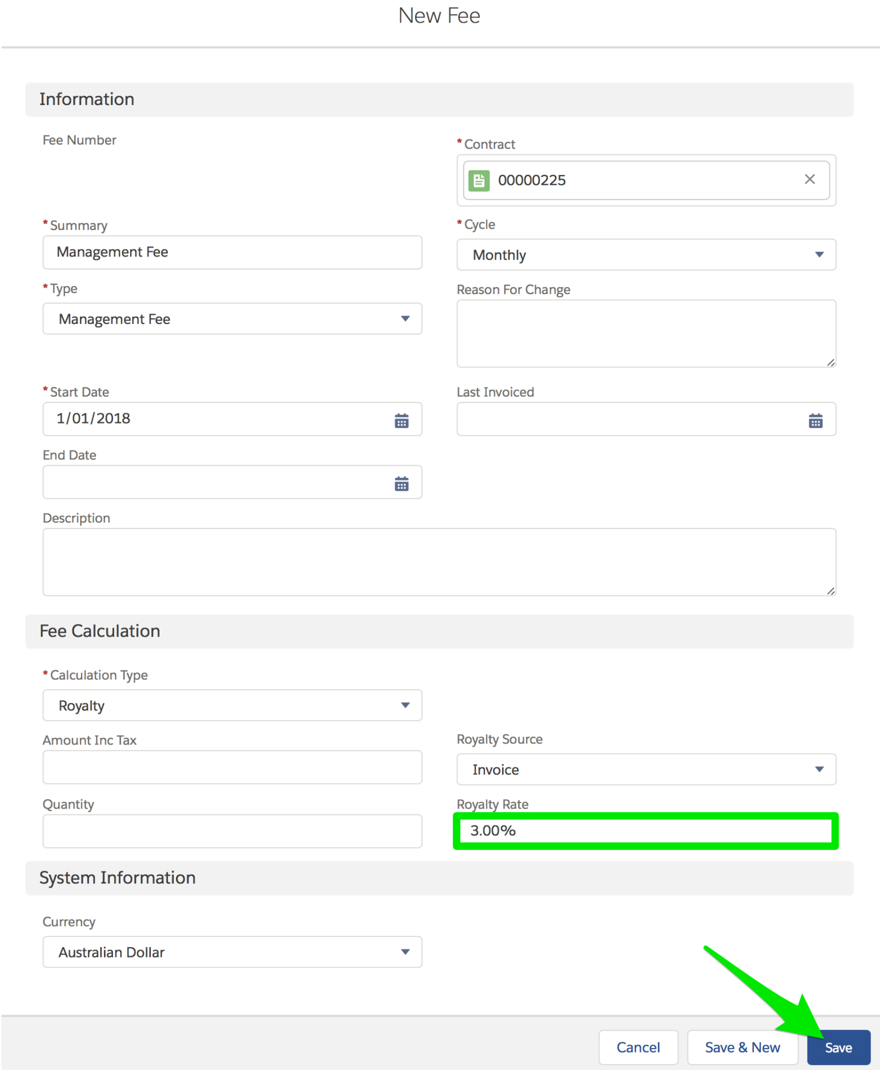
1. From the `Calculation Type` field, select *`Royalty`*.



2. From `Royalty Source`, choose which revenue record will be used to calculate the fee.



3. In **Royalty Rate**, enter the percentage value, then press **Save**.



How to adjust a contract fee

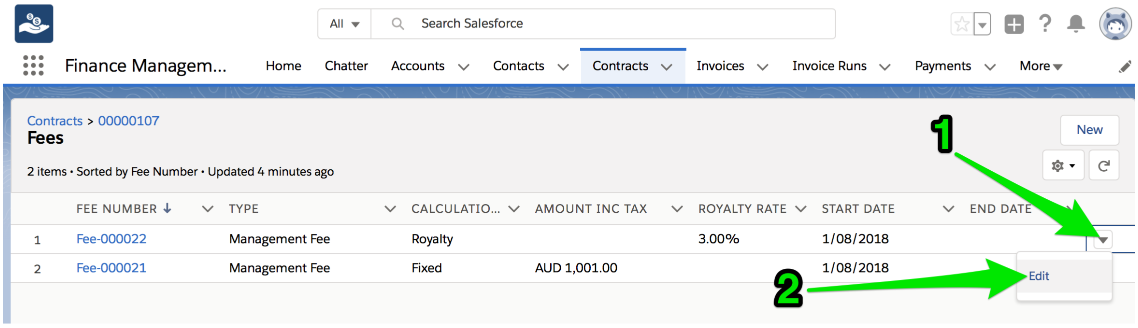
There are times when you need to change a contract fee.

> Annual CPI adjustments routinely require you to change fixed fees.

When you change a contract fee, you need to expire the current fee and then add a new fee. This is necessary to enable any further trailing fees at the current rate to be charged before switching to the new rate. It also maintains a record as to the fees historically charged on a contract.

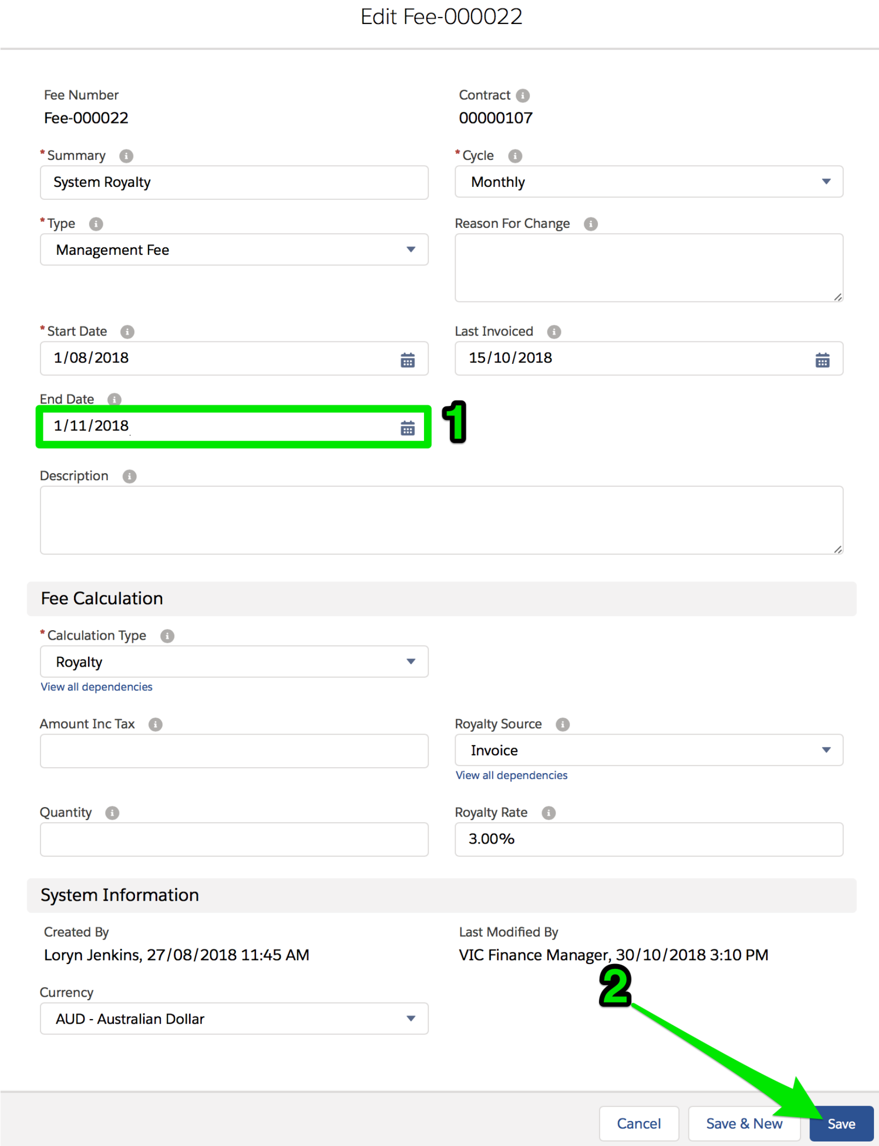
To expire a contract fee

1. View all fees on a contract. *See* "How to view all fees on a contract" on page 34.
2. From the **Fees** list, locate the fee and select the **Edit** button.

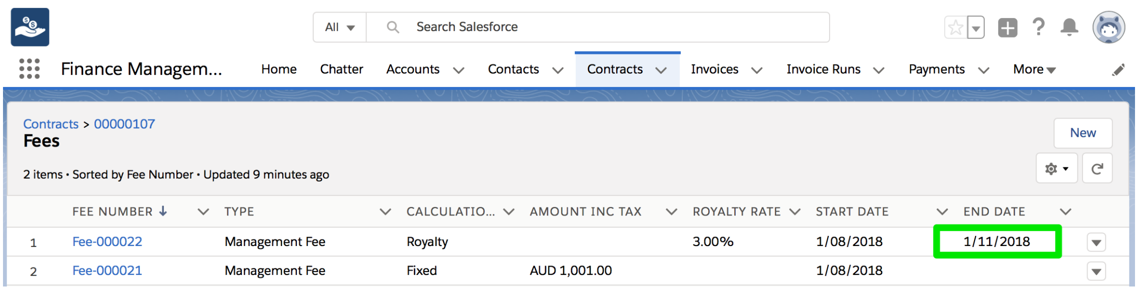


The **Edit Fee** dialog box opens.

3. From the **Edit Fee** dialog box, Enter an `End Date`, then press **Save**.



The fee is now listed as having an **End Date**.



This is the last date at which this fee will be charged.

4. Now that you have ended the previous fee, add a new fee to the contract. This new fee will serve as the "adjusted fee." *See* "How to add a contract fee" on page 36.

CHAPTER 3

Franchise Profile Accounts

Understanding franchise profile accounts

Franchise Profile Accounts represents the franchise operating entity. Settings on the Franchise Profile Account are used to control:

- Job Allocation
- Contact details
- Trading hours
- Defaults used on quotes and invoices

Beyond the franchise settings, the Franchise Profile Account ties together:

- the franchise owner
- the contract
- the territory
- the mastery territory to which this territory belongs

Visibility of the franchise profile account

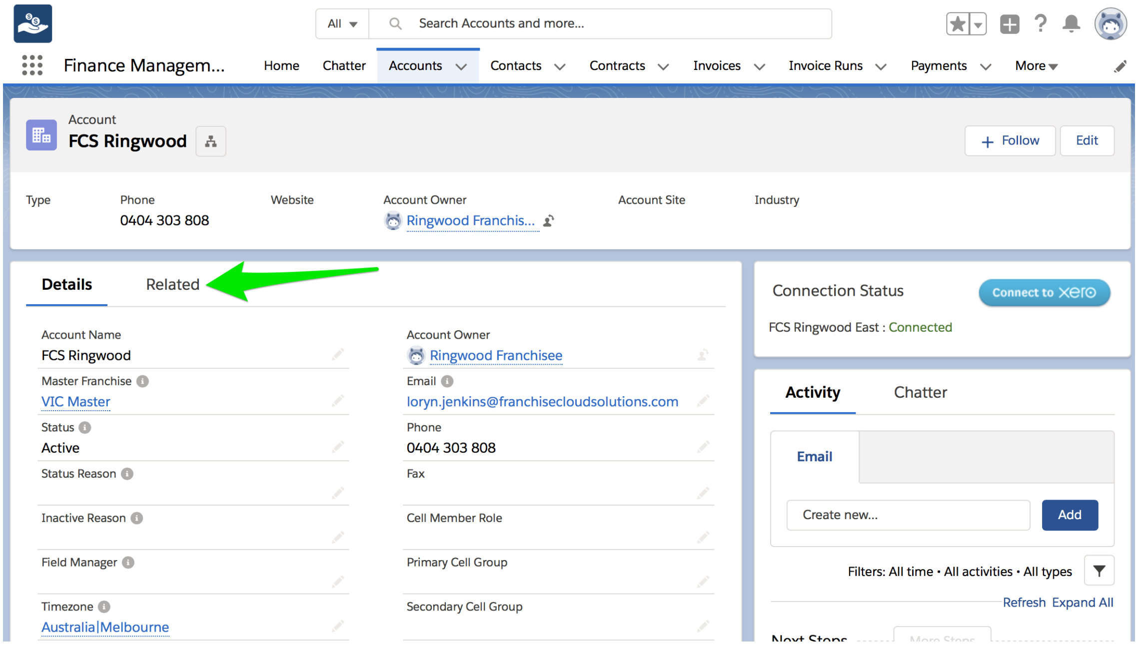
The Franchise Profile Account (together with Jobs, Accounts, Contacts, Territories and Territory Locations) is shared between the franchisor and the franchisee. Any information stored on, or attached to, the Franchise Profile Account is visible to the franchisee.

When franchisors wish to record private information relating to a franchisee, a Management Log must be used. *See* Understanding management logs.

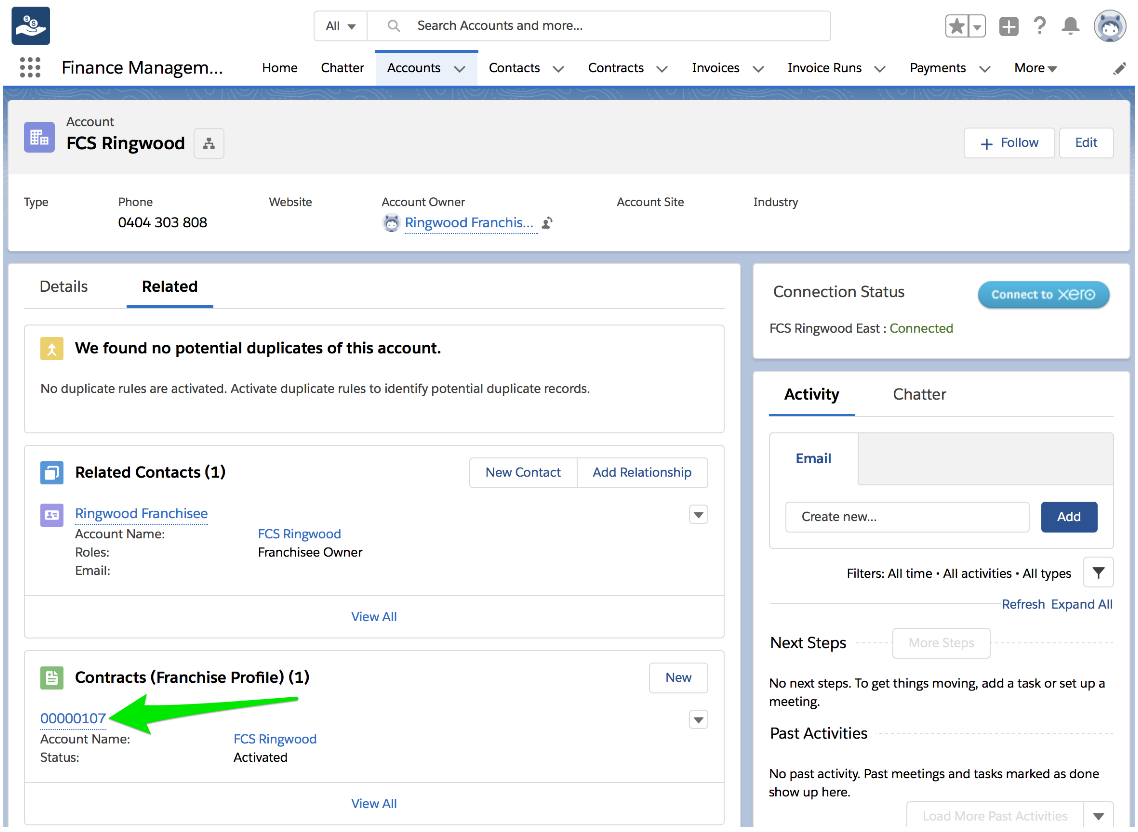
How to find contract fees for a franchise

To view all fees on a contract

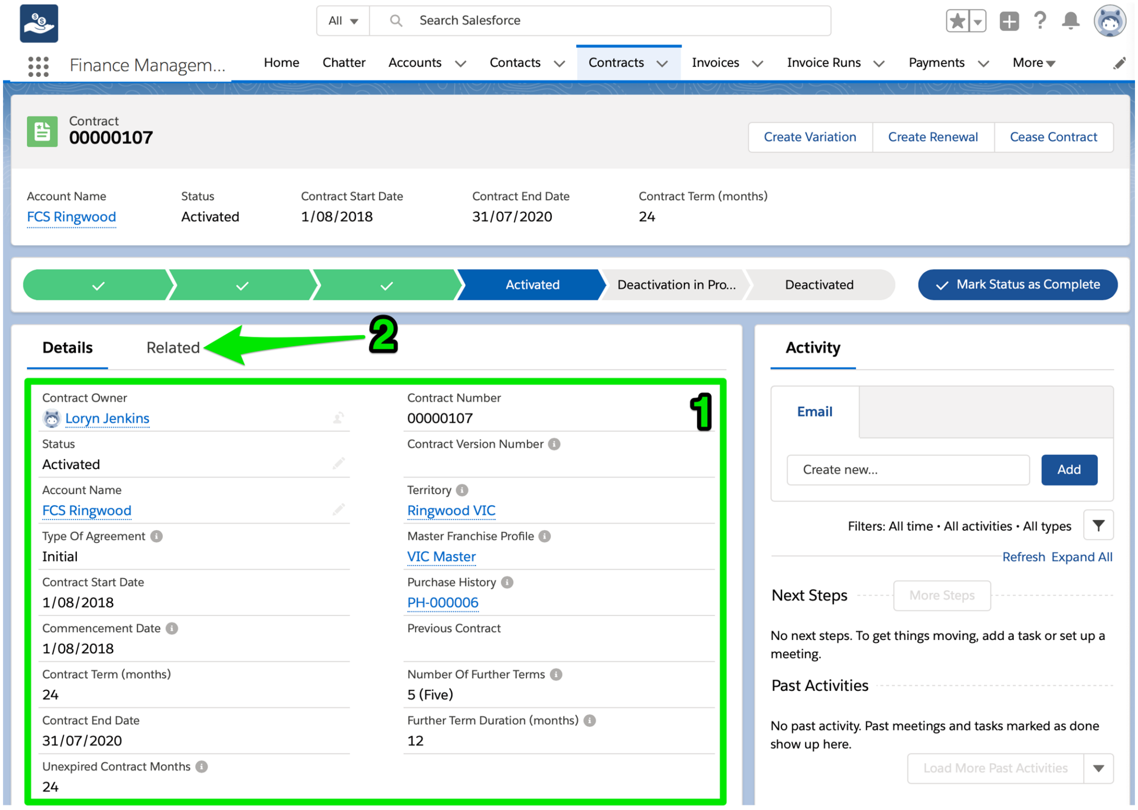
1. From the **Account**, select the **Related** tab.



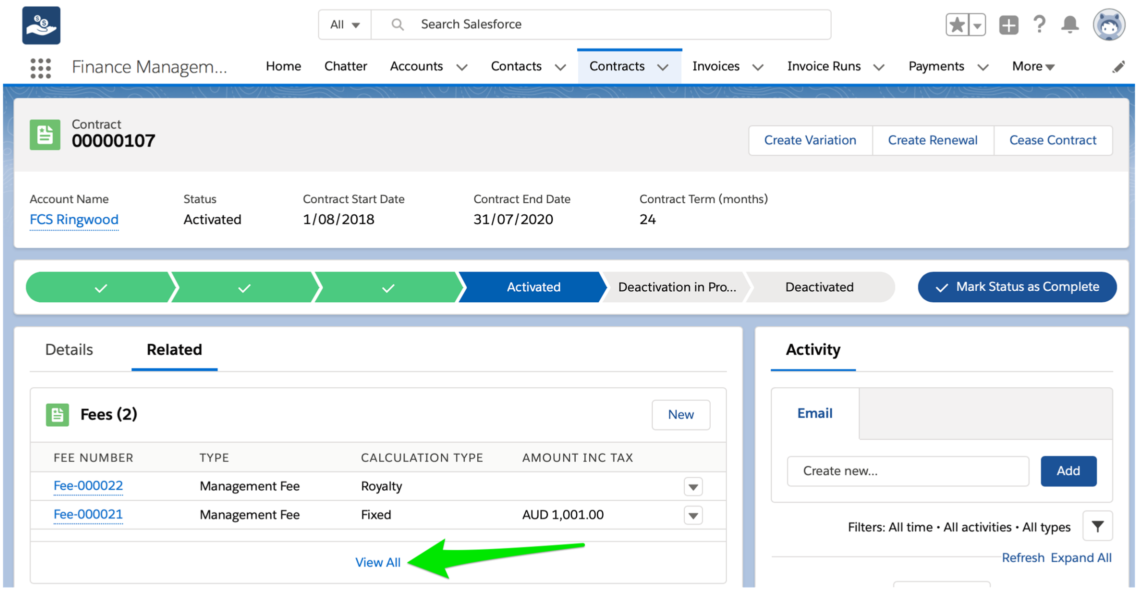
2. Locate the **Contracts** section, and select the contract whose `Status` is `Activated`.



3. Note the contract's current details. When ready, select the **Related** tab.



4. From the **Fees** section, press **View All**.



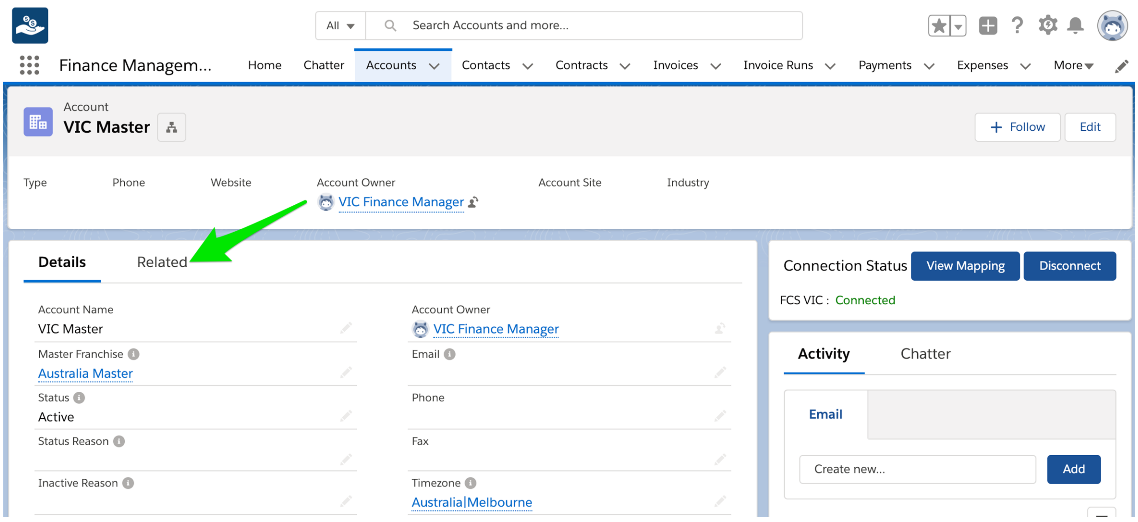
The **Fees** list shows all past and present fees associated with the **Contract**.

How to add a company asset

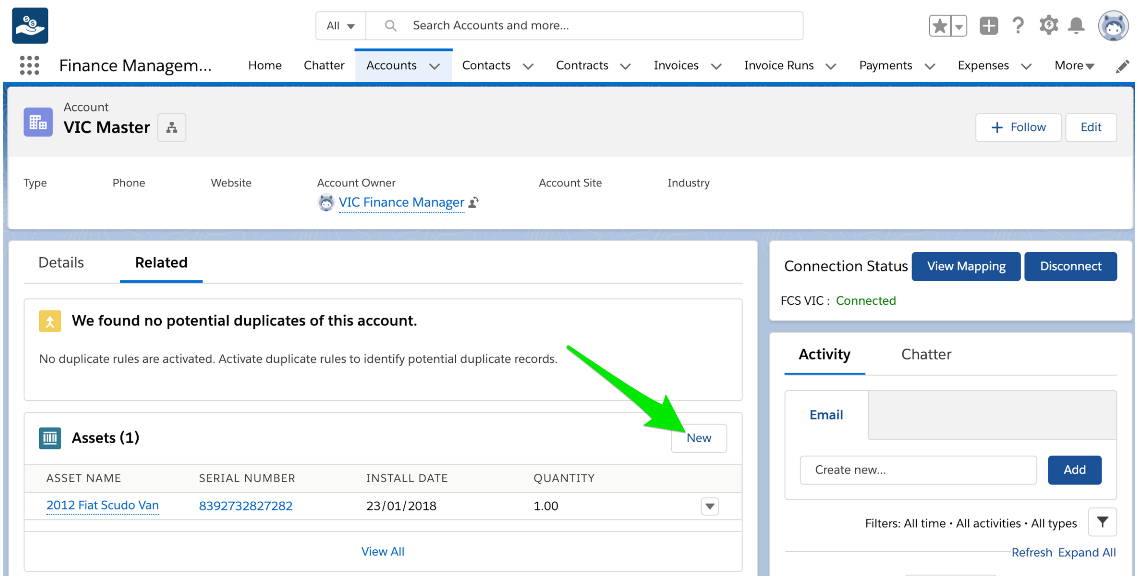
Company owned assets can be registered against the Master Franchise Profile Account.

To add an asset to the register

1. From the Franchise Profile Account, select **Related**.

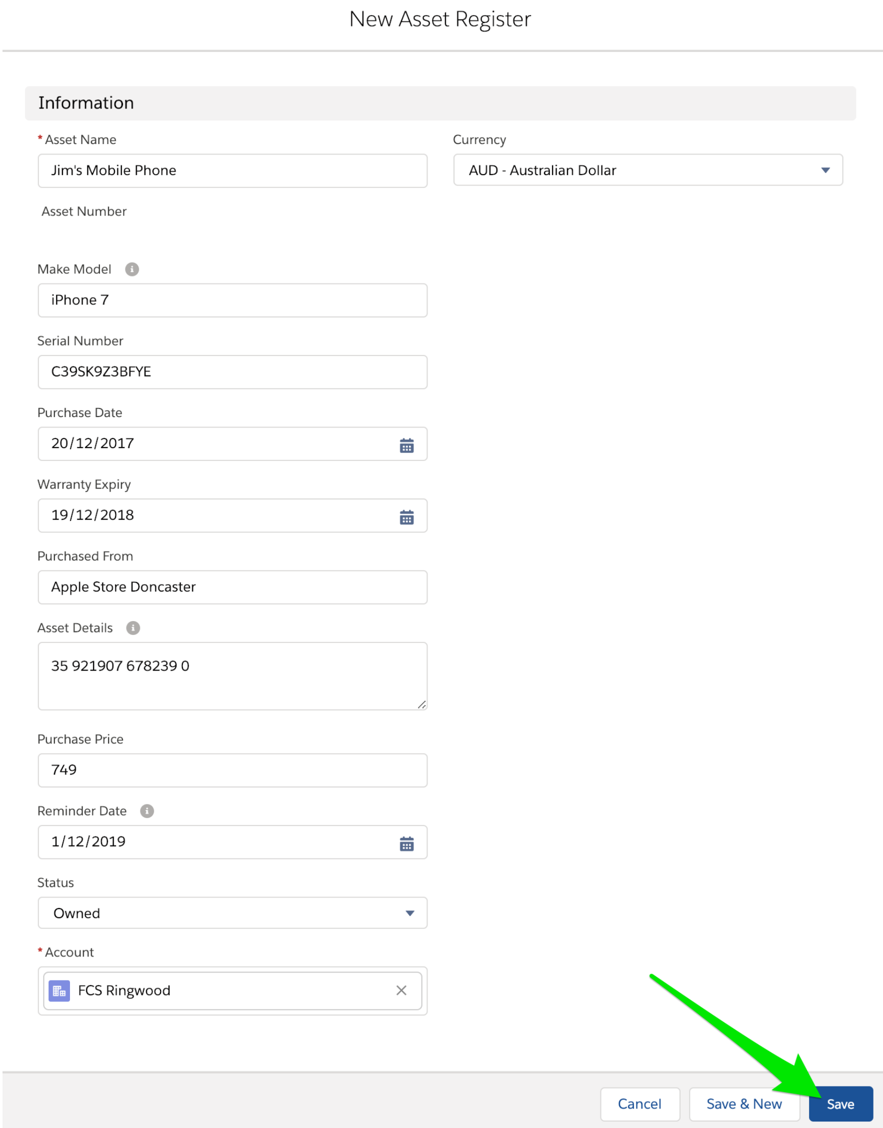


2. On the **Related** tab, locate the **Assets Register** and press **New**.

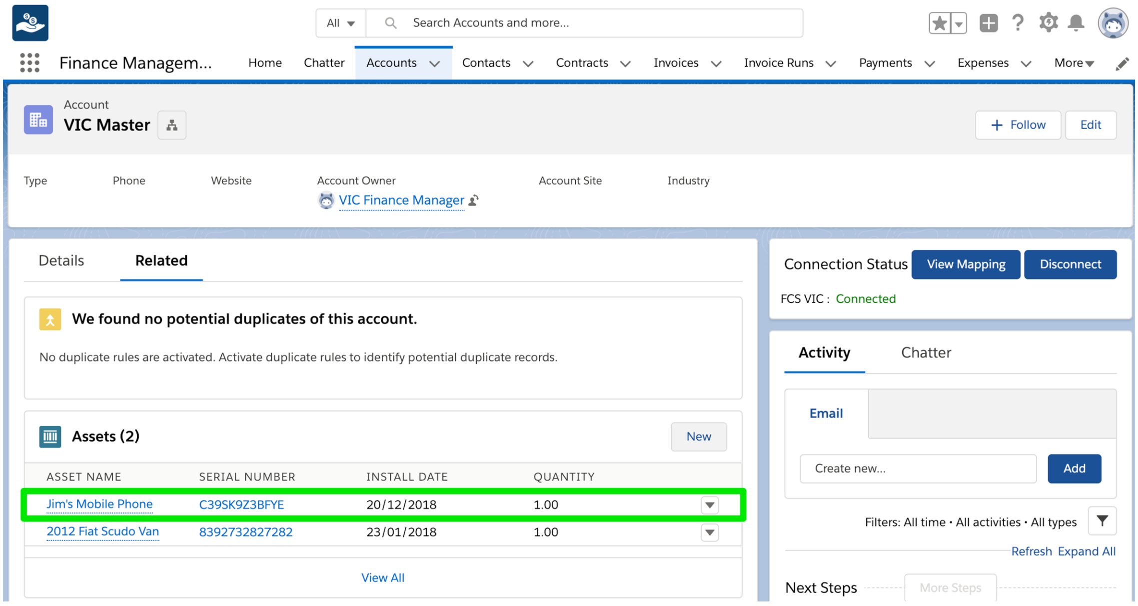


The **New Asset Register** dialog box appears.

3. Complete the details for the new asset then press **Save**.



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.

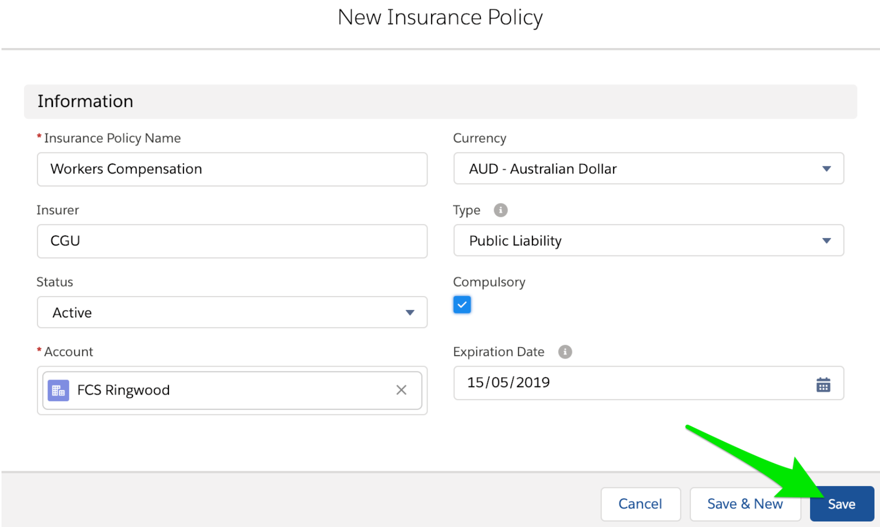
How to add an insurance policy

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

To add an insurance policy

1. From the Master Franchise Profile Account, select **Related**.
2. On the **Related** tab, locate **Insurance Policies** and press **New**.

   The **New Insurance Policy** dialog box appears.
3. Complete the details for the new policy then press **Save**.



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

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

CHAPTER 4

Working with Expenses

Understanding expenses

Expenses enable you to include charges on franchisee invoices that are additional to standard contract fees. You can include one off charges or have a charge be invoiced in a series of installments.

When you enter an expense, the expense is converted into one or more expense lines.

- When you enter an expense with a single installment, it is converted into a single expense line.
- When you enter an expense with multiple installments, it is converted into one expense line per installment. The effective date of the installments are spread across subsequent months.

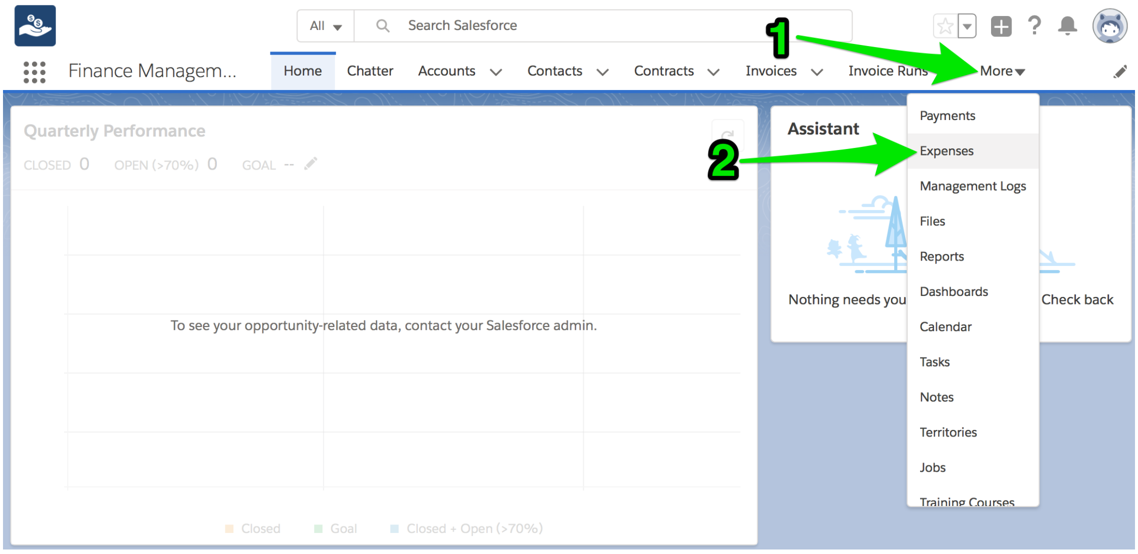
Expense lines are invoiced in the first invoice run configured to charge expenses and whose period includes the expense line's `Due Date`.

> Expenses can really lower the communications overhead between the management team and the finance team.
>
> For example, if the management team agrees to run additional advertising in a territory, they can enter the expense as a series of installments. These expenses will automatically be picked up by the invoice run. It avoids having to communicate special payment information to the finance team via email at the beginning or the end of the installments.

How to enter an expense

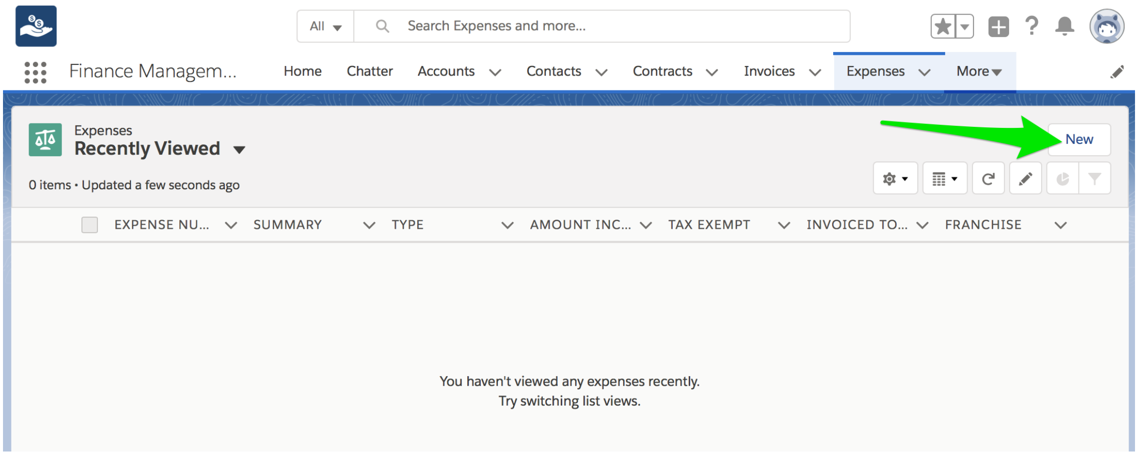
To create a new expense

1. Using the Salesforce menu, locate the **Expenses** tab.



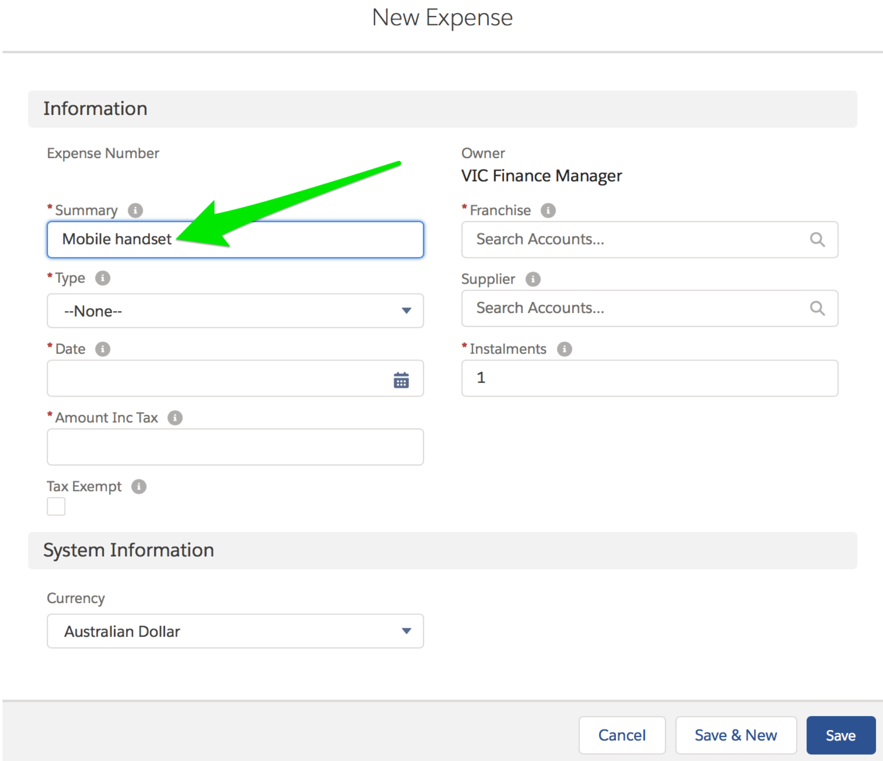
Recently Viewed expenses are displayed.

2. Press **New**.

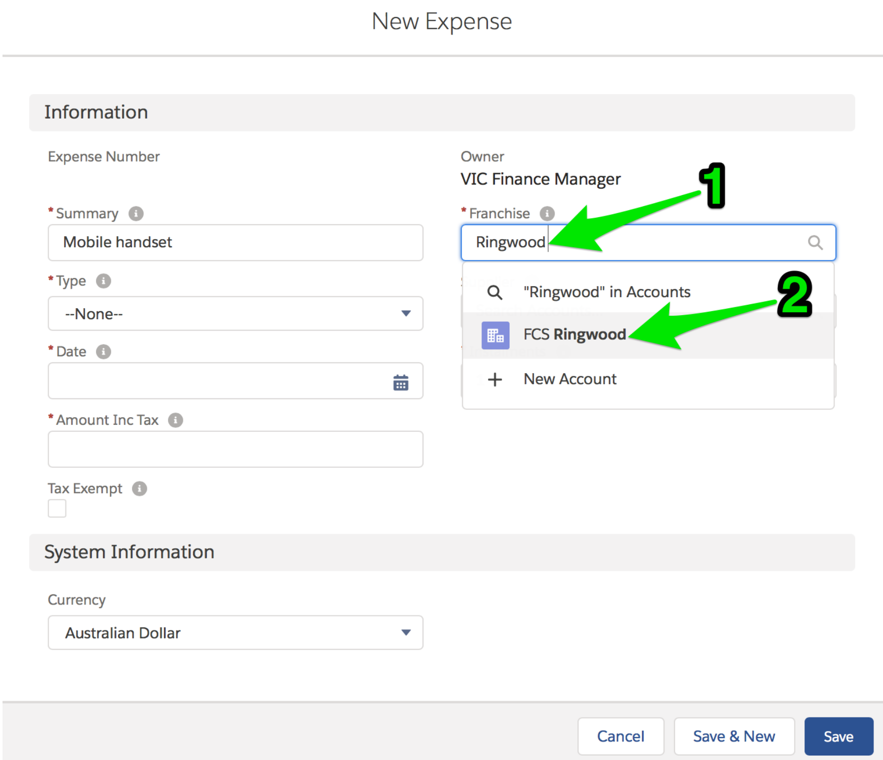


The **New Expense** dialog box appears.

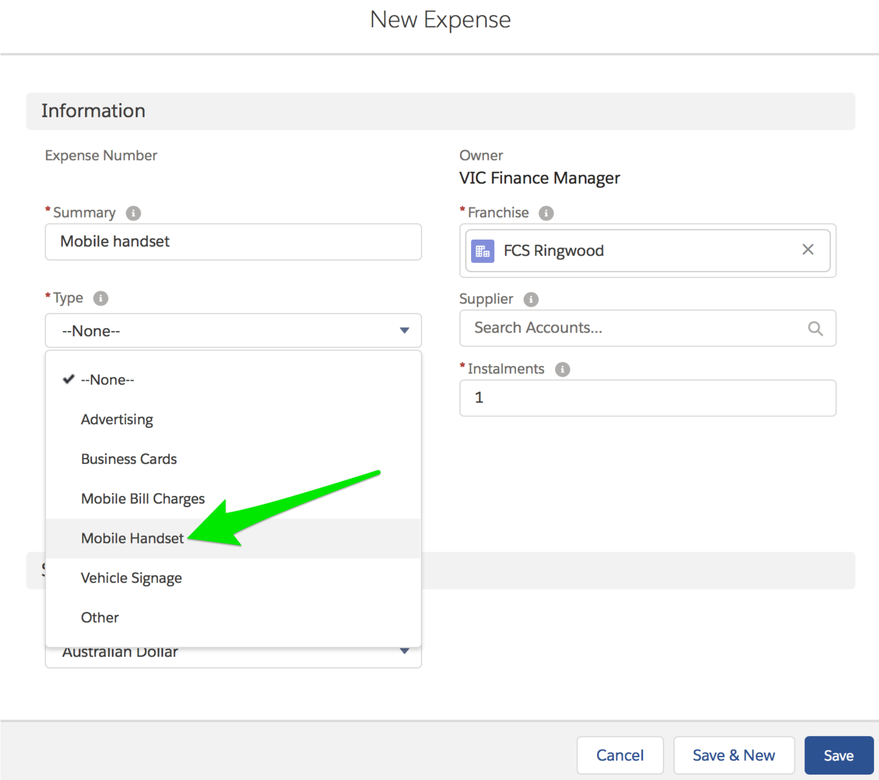
3. Enter the expense description into the `Summary` field. This will appear on the franchisee invoice.



4. Select the `Franchise` to which the expense will be invoiced.



5. Select the expense `Type`.

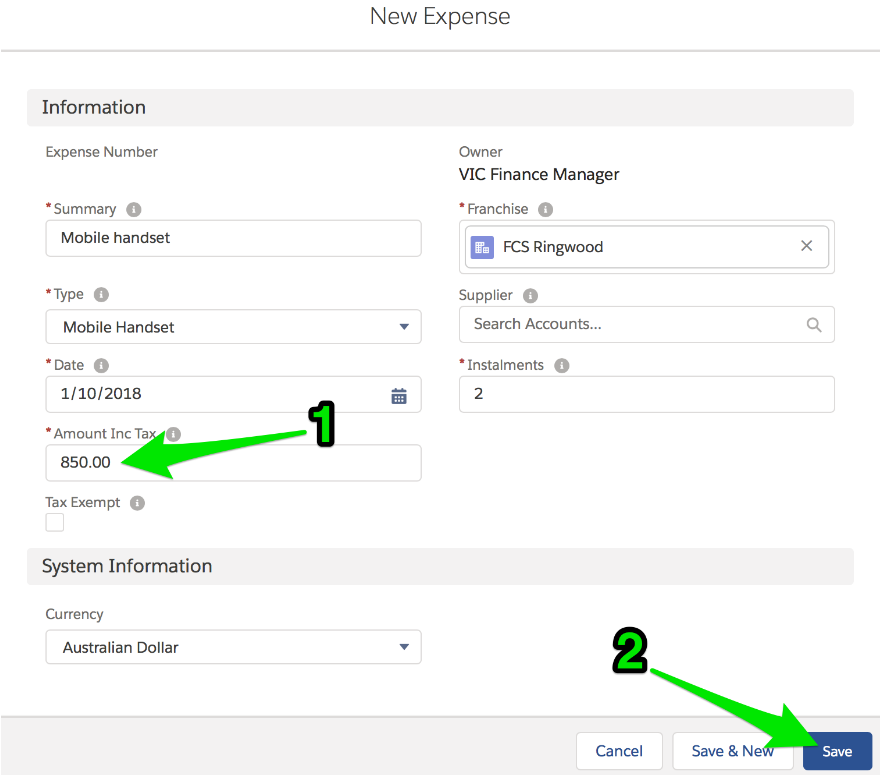


> The expense `Type` can be used to determine which invoice run includes this particular expense. *See* "Understanding invoice runs" on page 64.

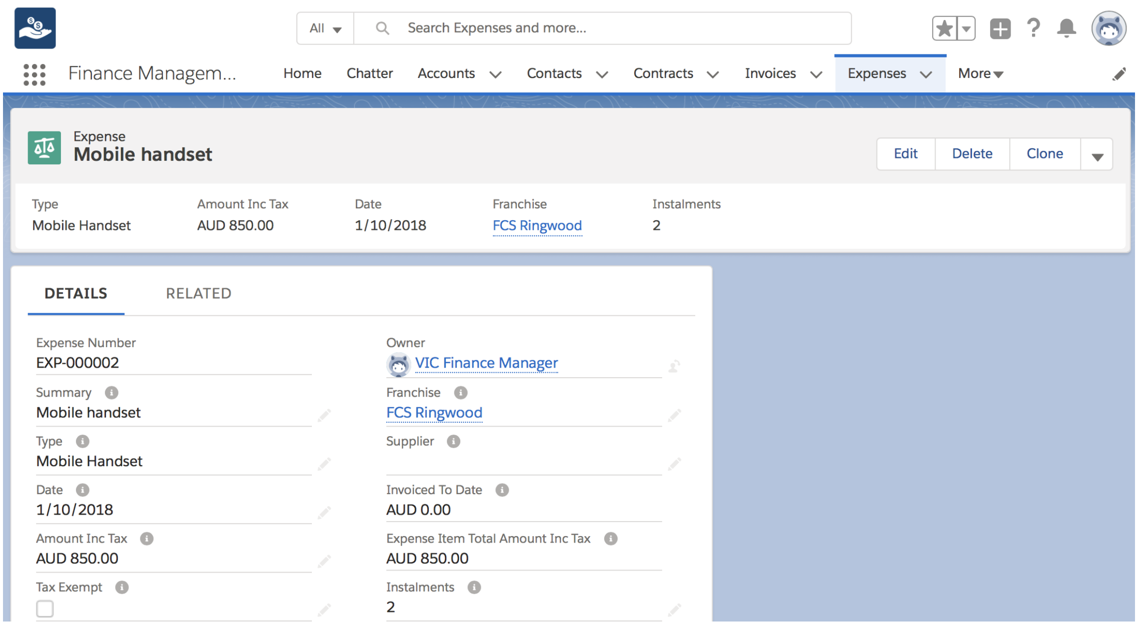
6. Enter the `Date` the expense was incurred.
7. Choose the number of installments in which this expense will be paid.

> Installments are payable on subsequent months.

8. Enter the **Amount Inc Tax**, then press **Save**.

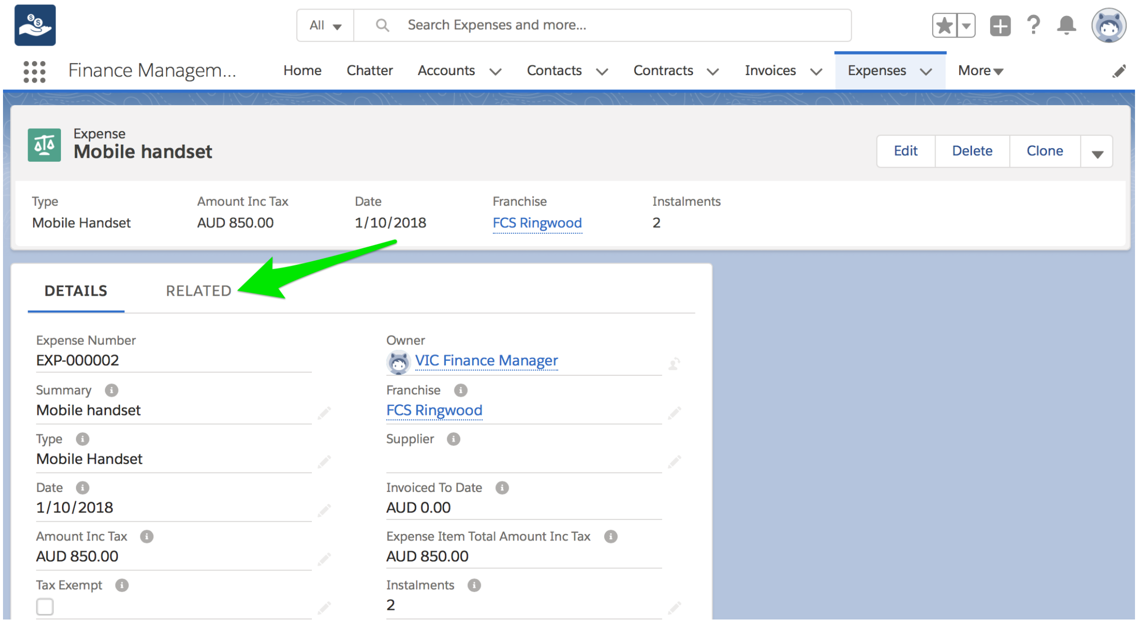


Finance Management displays the newly created **Expense** record.

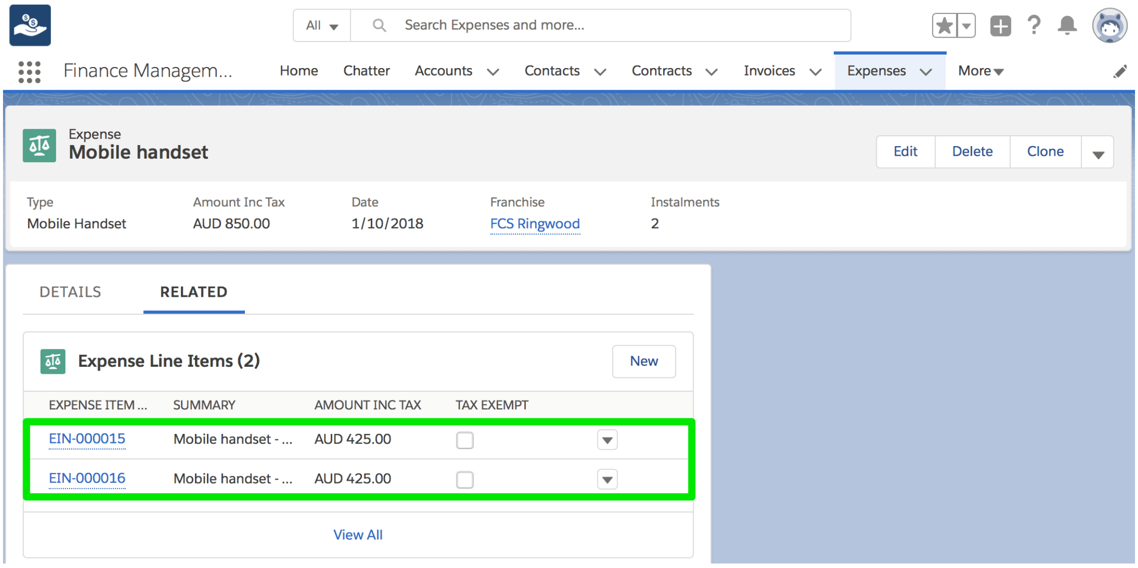


To see when an expense will become payable

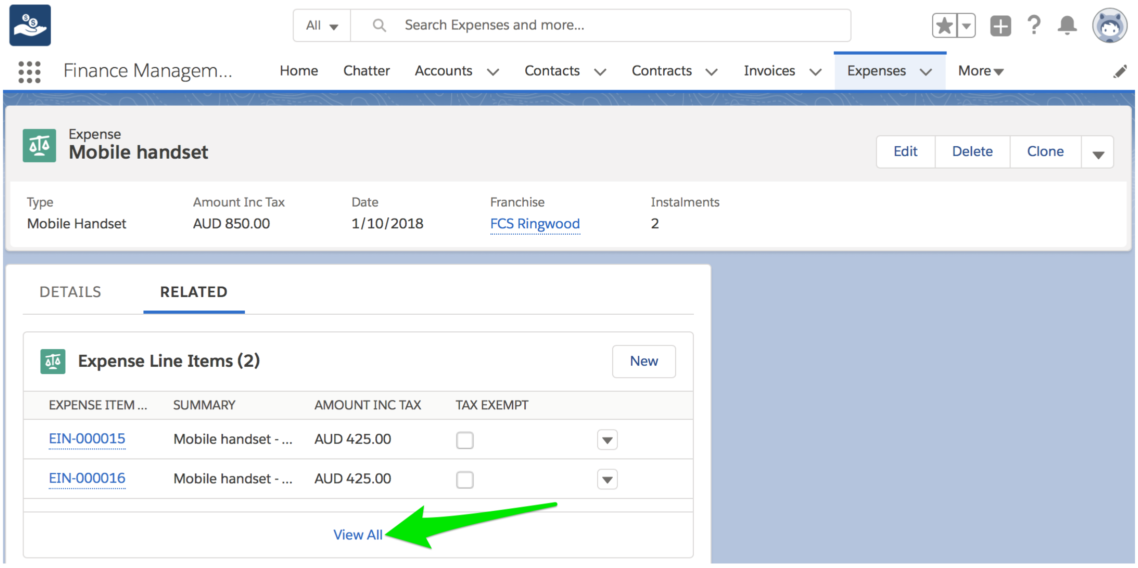
1. From the **Expense**, select the **Related** tab.



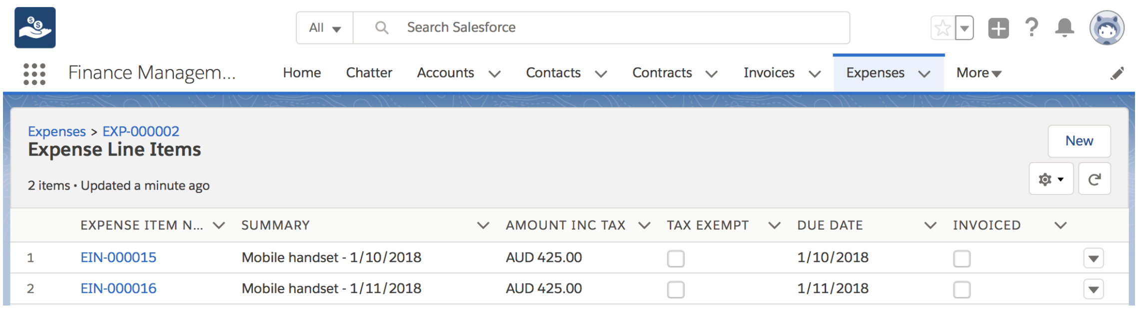
2. Review the expense lines.



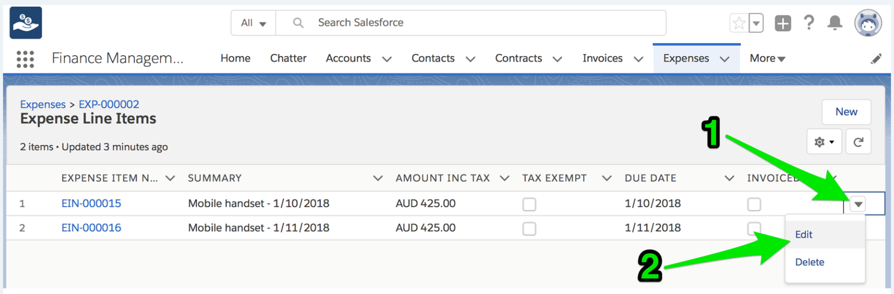
3. To see more detail, press **View All**.



All **Expense Line Items** display.



If you need to manually edit any of the expense lines, select **Edit**.



CHAPTER 5

Working with Invoice Runs

Understanding invoice runs

Finance Management automates mass generation of periodic invoices for all franchisees on behalf of a particular Master Franchise. Invoices are generated by reading the contract fees from each franchisee's contract. Expenses whose type and due date match an invoice run are also charged.

Automatic generation of invoice runs provides significant benefits to your business, by:

- Increasing the reliability of producing periodic invoices
- Minimizing the communications over head between the management team and the finance team
- Increasing the efficiency of producing invoices compared with manual invoice generation

Understanding invoice sources

An invoice run is constructed by gathering certain fee types from the available fee sources.

Fee Sources	Fee Classes	Explanation
Contract Fees	Fixed Fees	Contract fees expressed as fixed dollar value per period.
	Percentage of Invoice value	Contract fees expressed as a percentage of invoiced value per period.
	Percentage of POS value	Contract fees expressed as a percentage of POS data (which is loaded into Salesforce from an external data source) per period.
Expenses	One off expenses	Any one-off expense to be paid by the franchisee.
	Expenses paid in installments	Any expense paid in installments over a series of months.

Understanding invoice cycles

Each invoice run defines its own periodic cycle. Each invoice cycle is capable of collecting fees that are configured for the matching cycle.

For example, an invoice run with a monthly cycle will only contain contract fees that are configured with a monthly cycle, ignoring all fees with a weekly cycle.

- A monthly invoice run can only charge contract fees on a monthly cycle.
- A weekly invoice run can only charge contract fees on a weekly cycle.

If you are wanting to issue a single invoice to your franchisees each period, it is important to configure all fees to have a single cycle. If you are wanting to issue multiple invoices each period, you can filter the fees charged on each invoice cycle by

- invoice source
- cycle length
- category

Understanding when expenses are invoiced

Every expense is assigned a date when it becomes capable of being invoiced. When you enter an expense, it is saved into an expense line. The date an expense can be invoiced is taken from the expense detail line's `Due Date` field.

An expense will be made part of the first invoice generated by an invoice run that:

1. Has an invoice source that collects expenses matching the expense `Type`, and
2. Whose period includes the `Due Date` specified by the expense line.

If you have multiple invoice runs that charge expenses for a particular `Type`, whichever invoice run covers the period that includes the `Due Date` and is run first will generate the invoice containing the expense.

No expense line is charged twice.

How to prepare a master franchise to generate invoice runs

A Master Franchise Profile must be set up correctly in order to generate invoice runs.

To check that a Master Franchise Profile will support invoice run generation

1. Ensure the `Billing Address` is set. If not, enter the `Billing Address`.
2. Ensure the `Default Tax Rate` is set. If not, set the `Default Tax Rate`.
3. Ensure the `Configuration Set` is not empty. If it is empty, ask your system administrator to add a `Configuration Set` for this Master Franchise Profile Account.

> Your implementation may also use fields within the **Payment Method Information** section.

> Check your site implementation notes to understand how your system has been configured.

How to ready franchisee account names for Xero sync

When an invoice from a franchise invoice run is synced to Xero, the invoice is linked to a "customer account." By default, the account name is given the value of the **Franchise Profile Account**'s (FPAs) `Account Name` field.

> If the Xero account name differs from the Salesforce **FPA** `Account Name` field, the sync process will update the Xero account name to make it match.

Sometimes, the name of the **FPA** `Account Name` is not a suitable name for the Xero account name. When this is the case, you can control the name of the Xero account through using

- `Financial System Name Type`
- `Trading Name` and
- `Legal Entity Name` fields.

How to use the Legal Entity Name field

- Use this to record the legal entity that operates this franchisee.
- The `Legal Entity Name` field is a simple text entry field. You can open if for edit and enter whatever name you need. Press **Save** to commit the change.

How to use the Trading Name field

- Use this to record the trading name under which this franchise is operated.
- The `Trading Name` field is a simple text entry field. You can open if for edit and enter whatever name you need. Press **Save** to commit the change.

How to use the Financial System Name Type field

- The Financial System Name Type field provides a drop-down list allowing you to select the style of name to be used for the Xero account name.
  - *--None--*
  - *Record Name*
  - *Legal Name T/as Record Name*
  - *Legal Name T/as Trading Name*

> **Record Name** will set the `Financial System Name` field from the **FPA** `Account Name` field.
>
> **Legal Name T/as Record Name** uses the `Legal Entity Name` followed by "`T/as`" then the `Account Name`.
>
> **Legal Name T/as Trading Name** uses the `Legal Entity Name` followed by "`T/as`" then the `Trading Name`.

- When you made a selection and saved it, the name that will be pushed to the Xero account is shown in the `Financial System Name` field.

> Any changes you might make to a **Franchise Profile Account** name in Xero will not be reflected back into Salesforce.
>
> When you begin syncing to a Xero account, the sync process controls the Xero customer account name field. This means that any changes you want made to a Xero account name must be done from Salesforce.

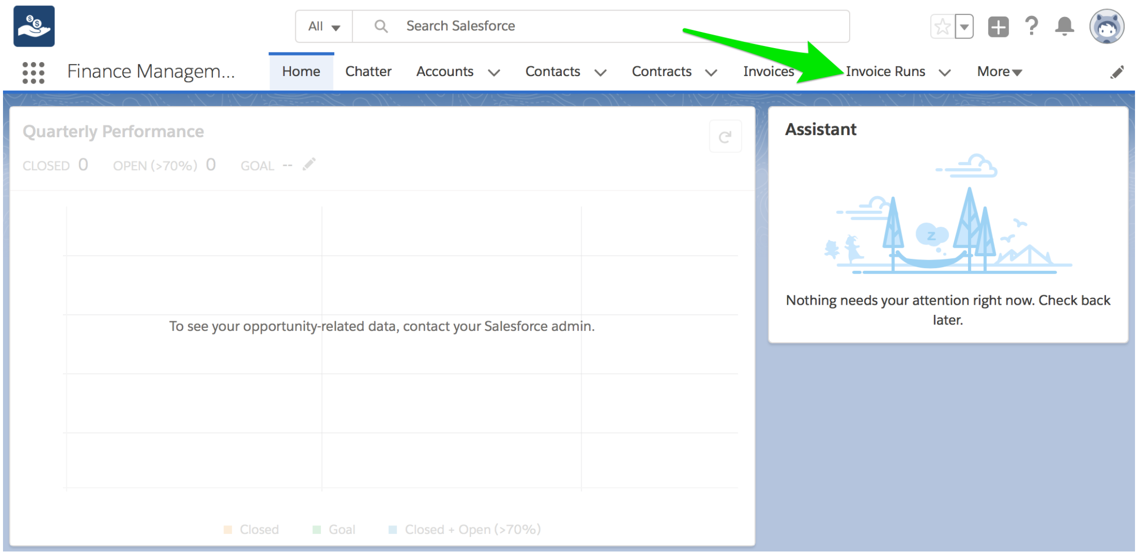
How to configure an invoice run

The simplest possible way to invoice franchisees is to charge all contract fees and expenses on a single cycle. The most commonly used cycle is monthly.

The following procedure builds an invoice run set for a monthly cycle that collects all contract fees and expenses.

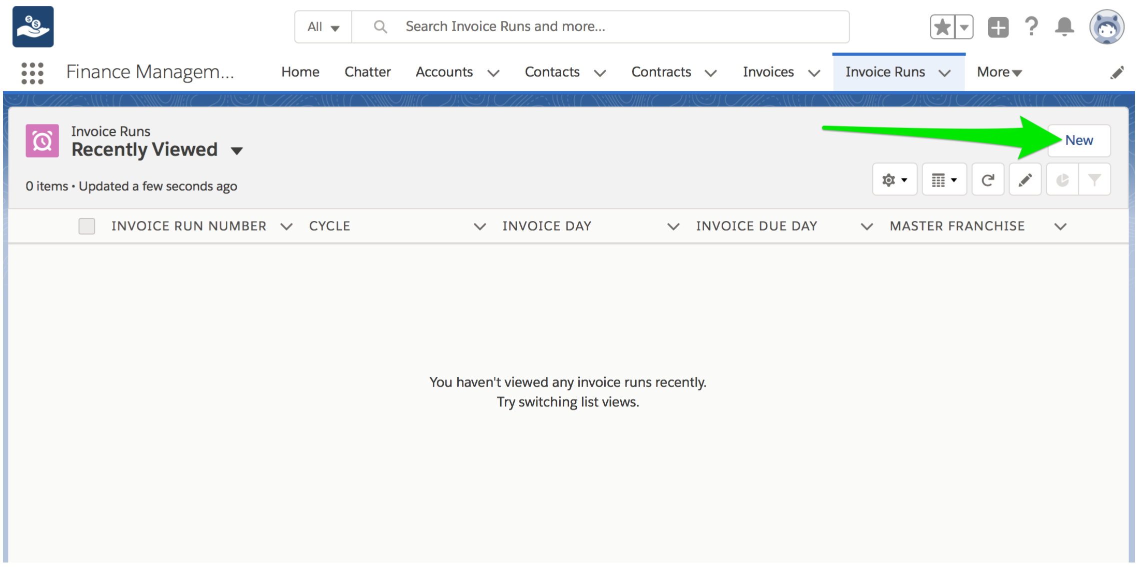
How to configure an invoice run

1. From the Salesforce menu, select **Invoice Runs**.



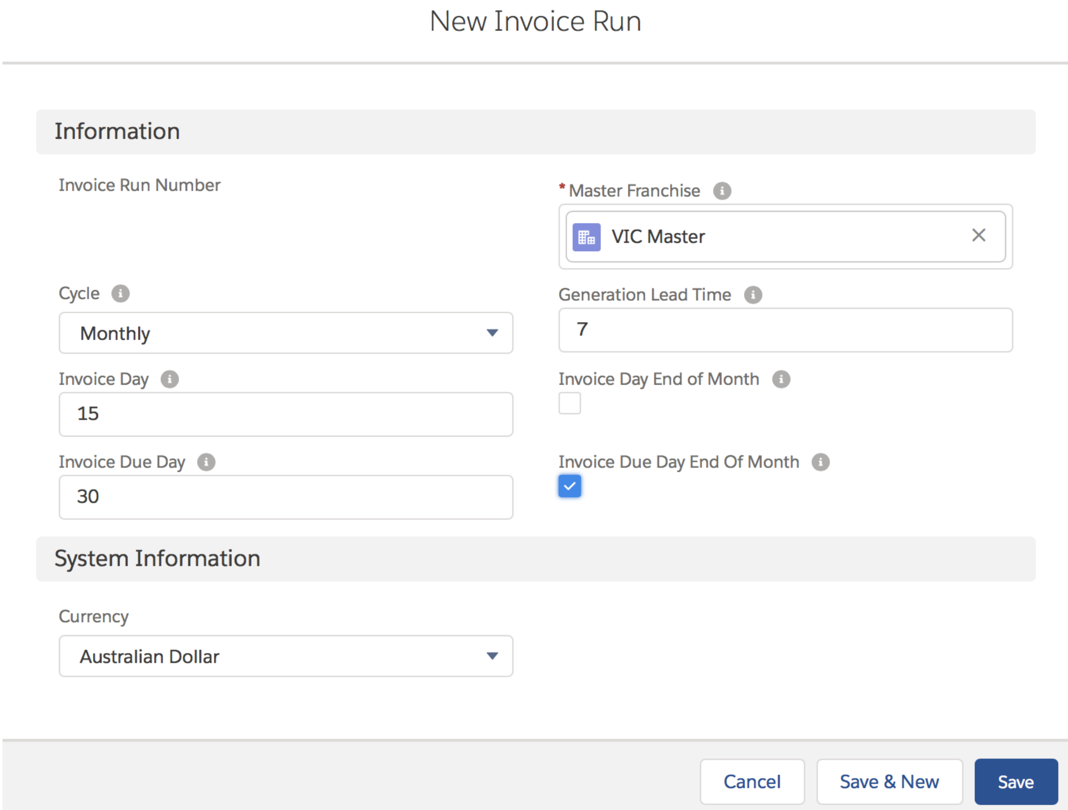
Recently Viewed invoice runs display. This list may be empty.

2. Press **New**.



The **New Invoice Run** dialog box appears.

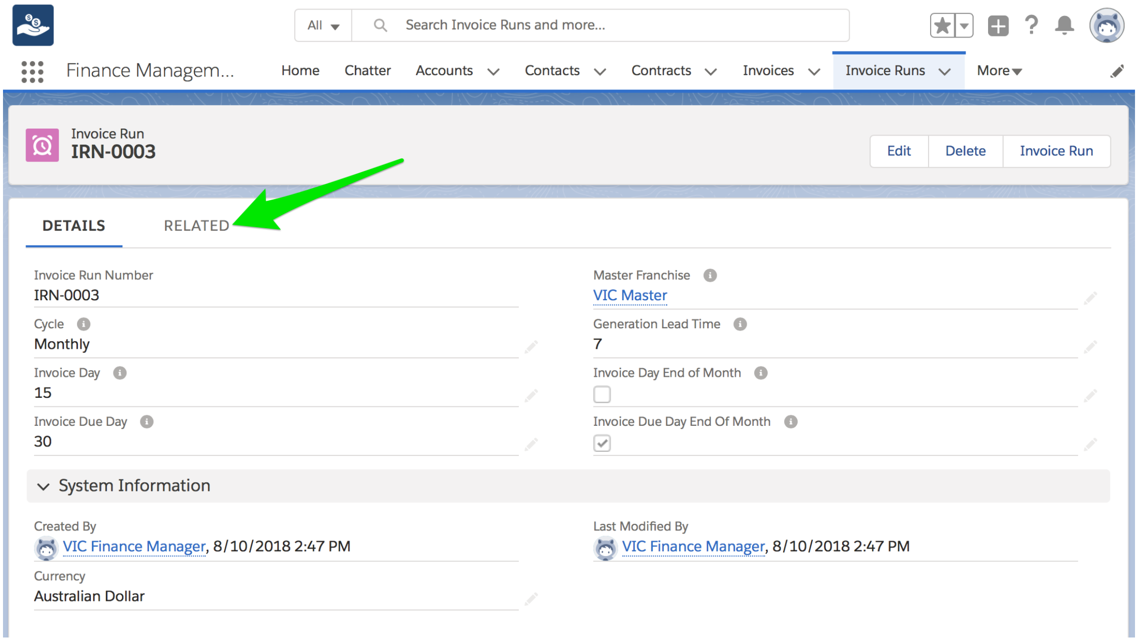
3. Enter the invoice run details, then press **Save**.



> Invoice run details are described in detail, How to specify invoice run cycles.

The **Invoice Run Details** page appears.

4. To configure the invoice run sources, select **Related**.

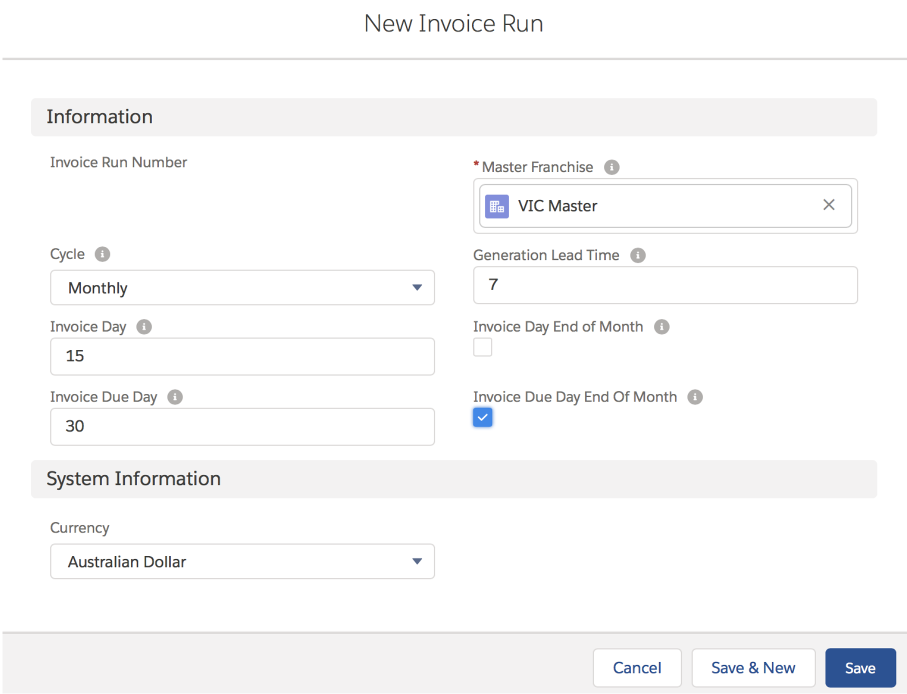


5. Now add two Invoice Run Sources:
   a. A contract fee invoice run source.
   b. An expense invoice run source.

> How to add an invoice run source.

How to specify invoice run cycles

Each invoice run is designed to operate on a particular cycle. You specify the cycle using the **New Invoice Run** dialog box.



What Invoice Day means on first generation

The first time you generate a run, `Invoice Day` specifies which day of the current month is the date displayed on the generated invoice.

> `Invoice Day` means "the day of the current month" regardless of the cycle selected.

How invoice runs work after first generation

Every subsequent time you generate an invoice run, the run will generate for the cycle after the most recently run cycle.

> If you last generated a monthly invoice run on 15/12/2017, and it is now 15/02/2018, the next time invoices are generated, it will be for 15/01/2018.

For every invoice cycle, Finance Management finds the most recently generated cycle, calculates the next cycle and generates that.

> This allows you to "catch up" if you happen to miss invoicing during any period.

> For daily, weekly and fortnightly cycles, `Invoice Day` only controls the invoice date for the first generation. Subsequent generations will calculate Invoice

Day as being one day, seven days or fourteen days after the most recently generated invoice.

What Invoice Due Day means

What `Invoice Due Day` means varies by cycle type.

Cycle	What Invoice Due Day means
Daily, Weekly, Fortnightly	Payment is due this number of days after the `Invoice Day`.
Monthly, Quarterly, Annually	Payment is due on this date of the current month (unless Invoice Day is set as the last day of the month). If `Invoice Day` is set to be the last day of the month, payment is due on this date of the next month.

What Invoice Due Day End of Month and Invoice Day End of Month check boxes mean

When `Invoice Day` or `Invoice Due Day` values are 28, 29, 30 or 31, checking either of these check boxes will cause the value to be “last day in the month”, no matter how many days there are in the month.

With either of these check boxes set, in February the invoice date or due date would be on the 28th, while in March it would be on the 31st.

These two check boxes affect only Monthly, Quarterly or Annual cycles, they do not apply to Daily, Weekly or Fortnightly cycles.

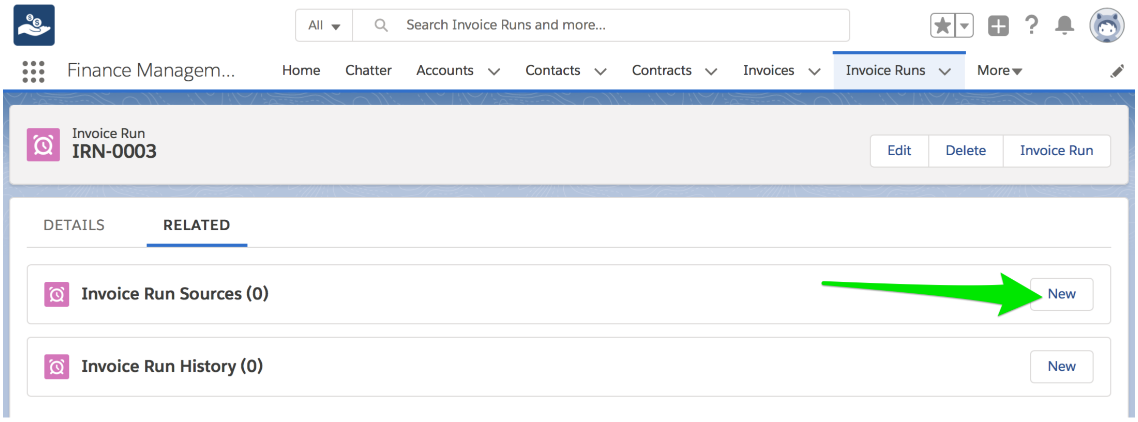
How to add an invoice run source

An invoice run source can be configured with a `Source Type` of either Contract Fees or Expenses. They can also be filtered by type (returning a single fee type) or unfiltered (returning all fee types).

An invoice source using Contract Fee will only return fees that have a cycle that matches the invoice run's cycle.

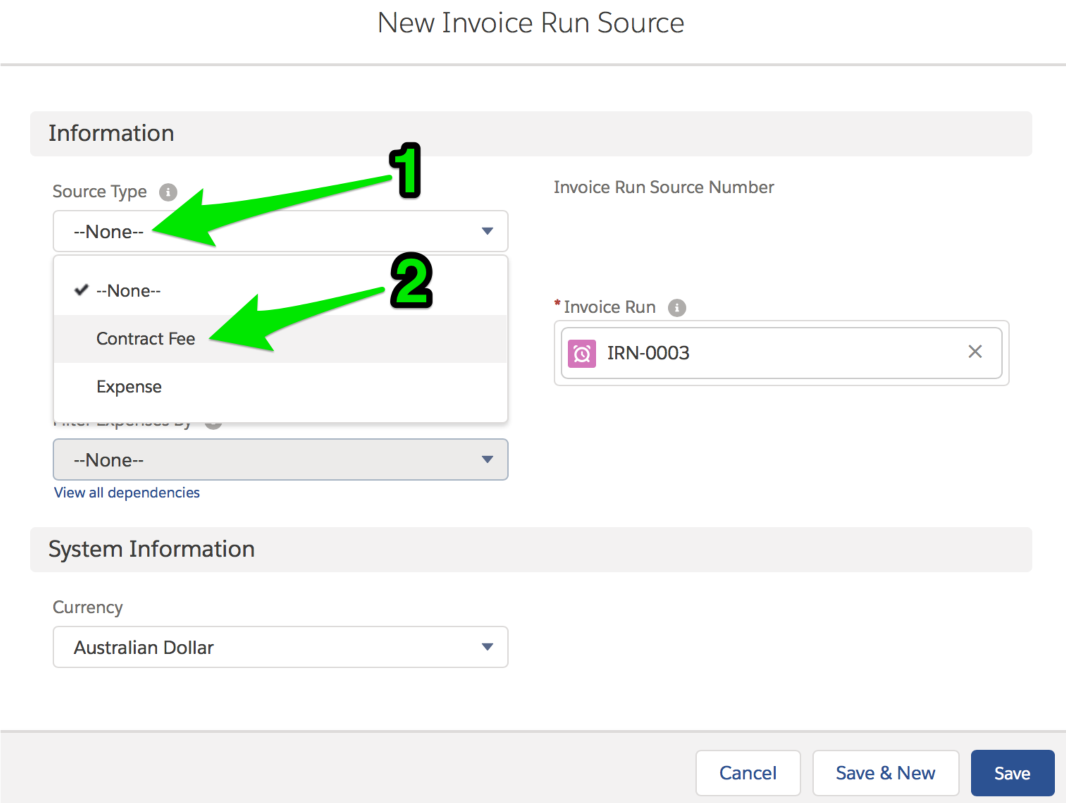
To add an invoice run source

1. From the **Invoice Run Related** tab, locate the **Invoice Run Source** section and press **New**.



The **New Invoice Run Source** dialog box appears.

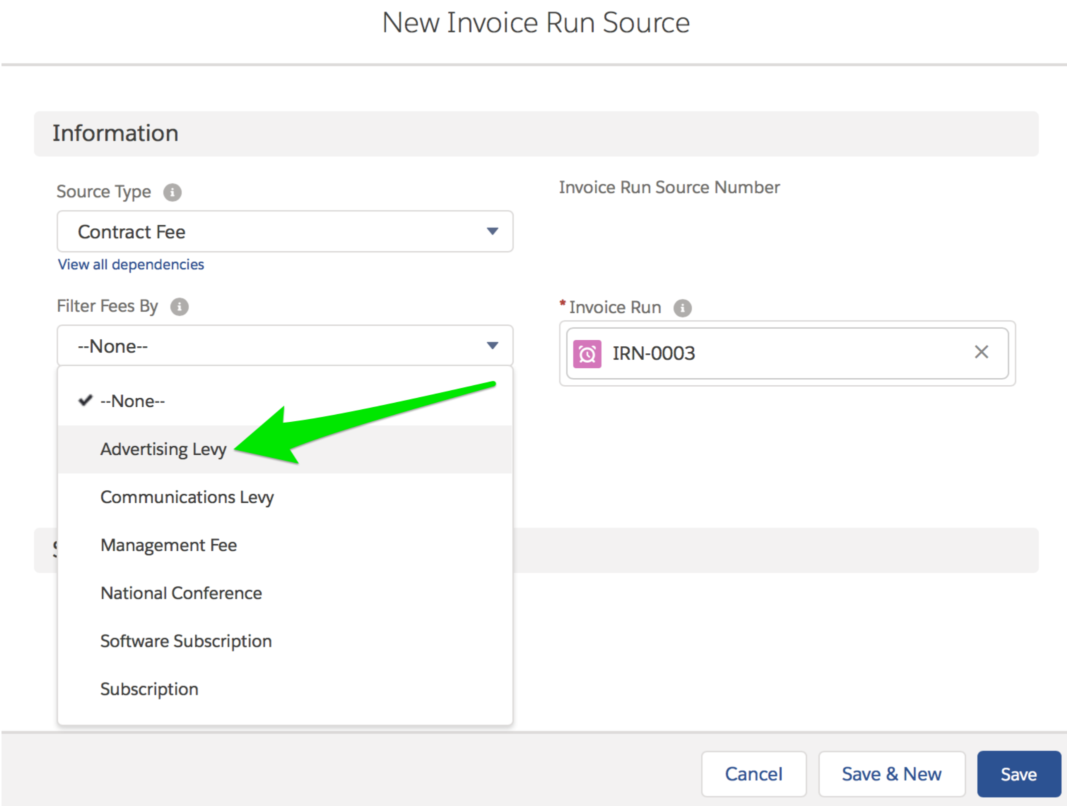
2. Choose the `Source Type`.



> For a listing as to what each `Source Type` can capture, Understanding invoice sources.

3. To capture all fees within a source, leave the source unfiltered.

4. To capture only one type of fees within a source, select a value from `Filter Fees By`.



5. Now press **Save**.

> To add another invoice run source, or to filter by additional categories, continue adding **Invoice Run Sources** until you are finished.

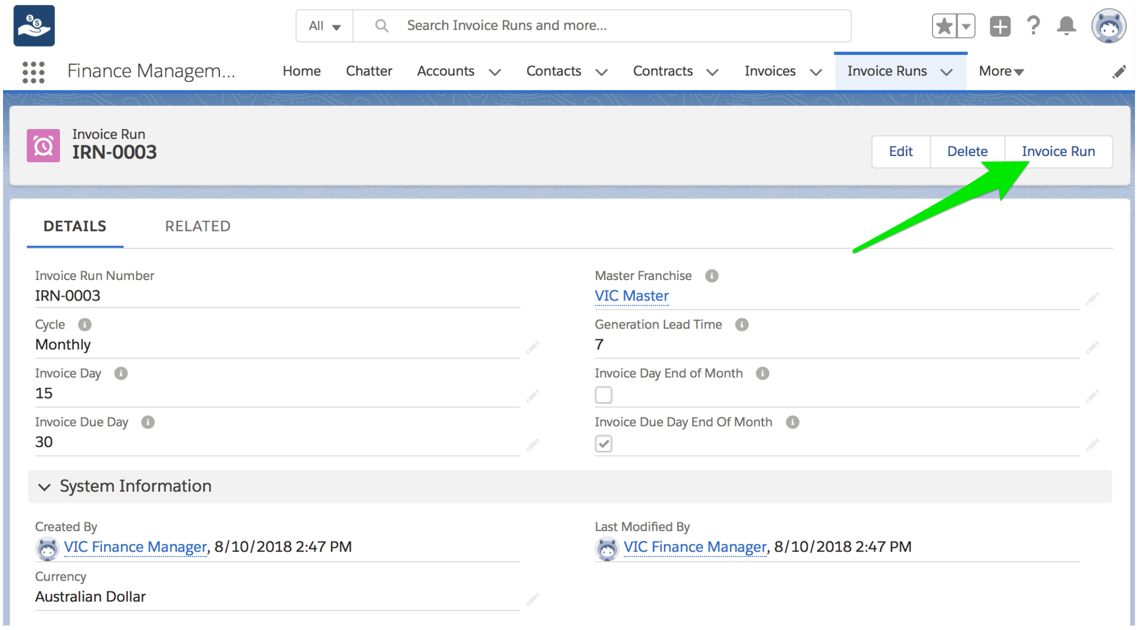
How to generate an invoice run

To generate invoices, the day's date must be either after the preceding cycle's `Invoice Day`, or after this cycle's `Invoice Day – Generation Lead Time` date.

> If `Cycle` is *`Monthly`*, `Invoice Day` is set to *`15`*, and `Generation Lead Time` is set to *`7`*, the earliest date you can generate this cycle's invoice run is the 8th.

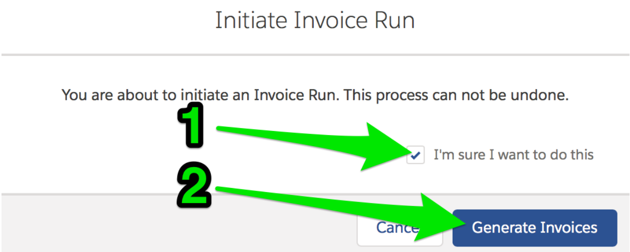
To generate an invoice run

1. From an **Invoice Run**, press the **Invoice Run** button.

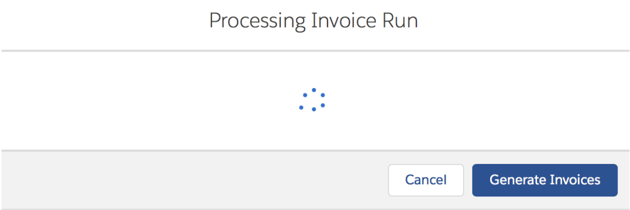


The **Initiate Invoice Run** dialog box appears.

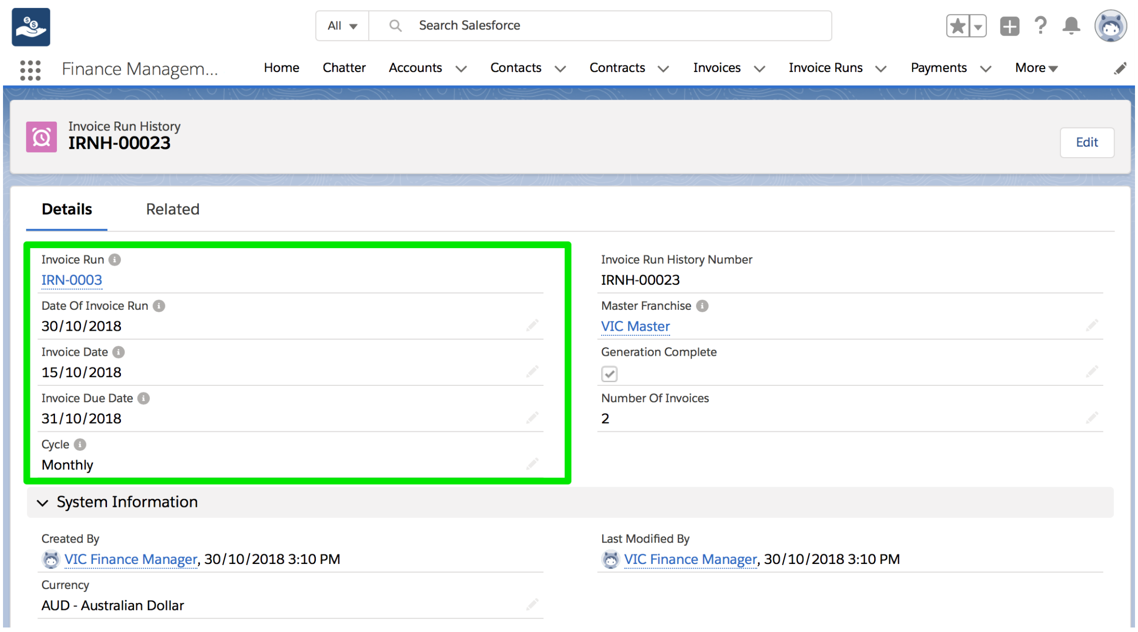
2. Check `I'm sure I want to do this`, then press **Generate Invoices**.



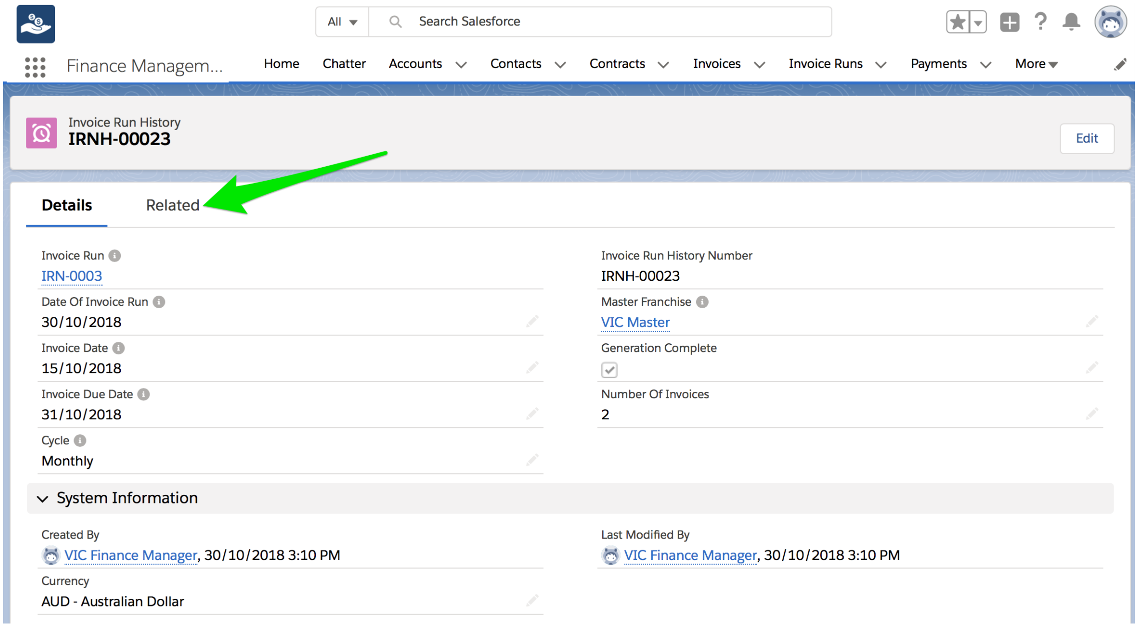
The **Processing Invoice Run** dialog appears. Wait until it completes processing.



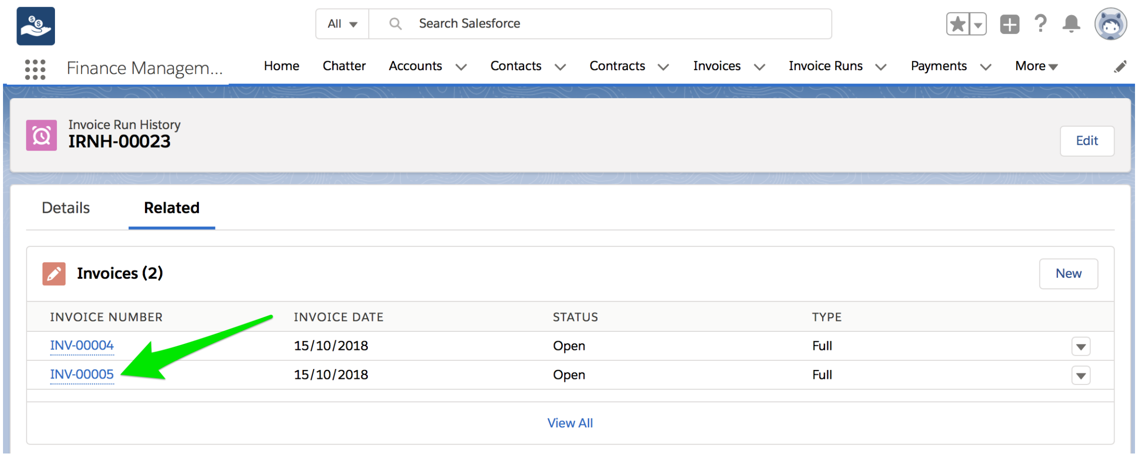
When completed, it displays the **Invoice Run History** record. You can see the summary of the invoice run details.



3. To see the list of invoices that have been generated, select the **Related** tab.



4. To view the details on any invoice, click on the **Invoice Number**.

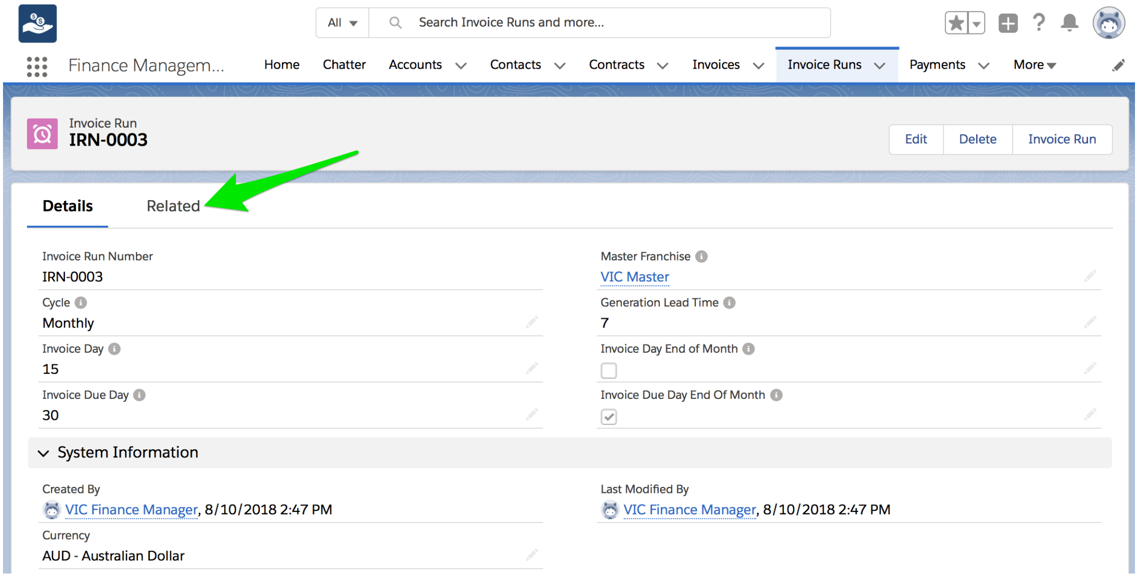


How to review generated invoices

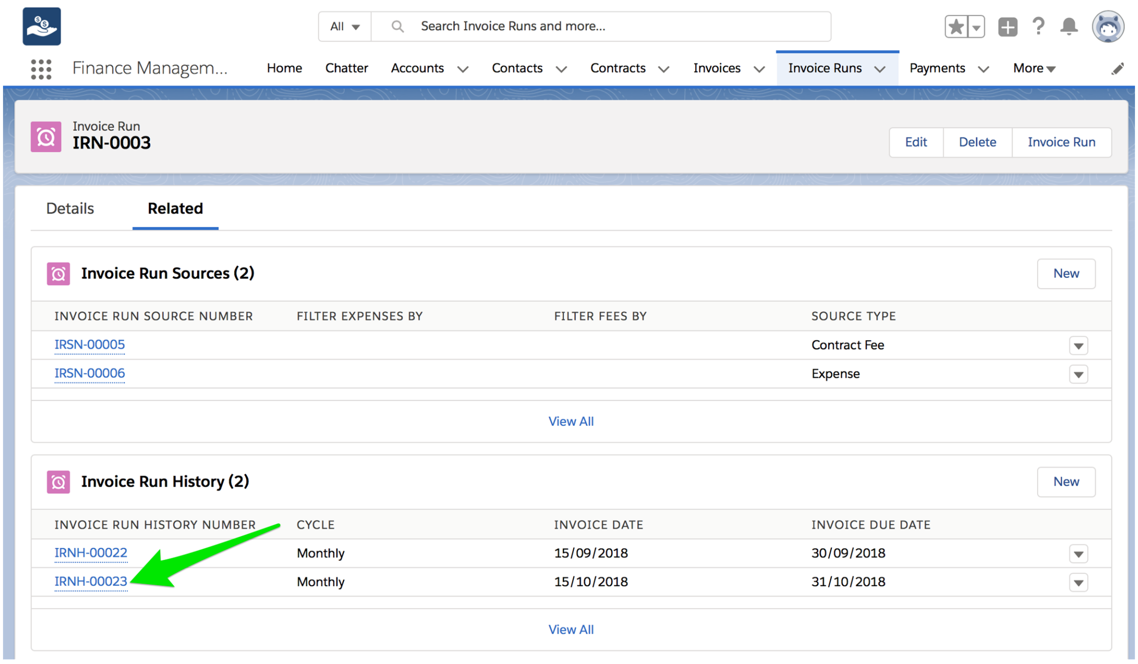
After generating an invoice run, you can inspect each invoice generated by the run.

To view invoices generated by an invoice run

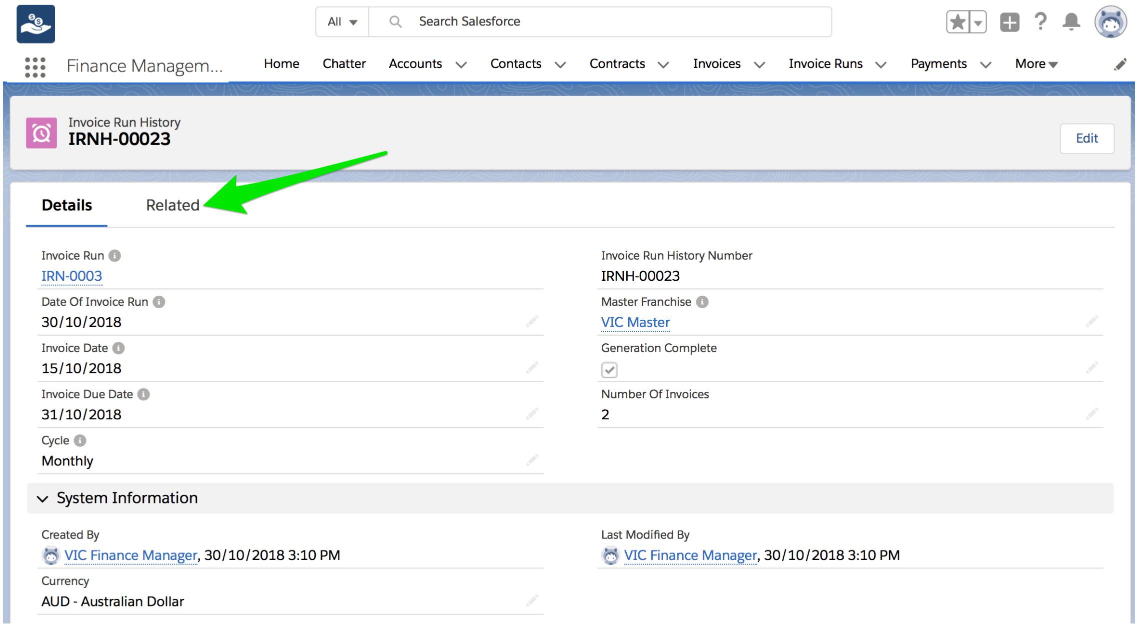
1. From an **Invoice Run**, select the **Related** tab.



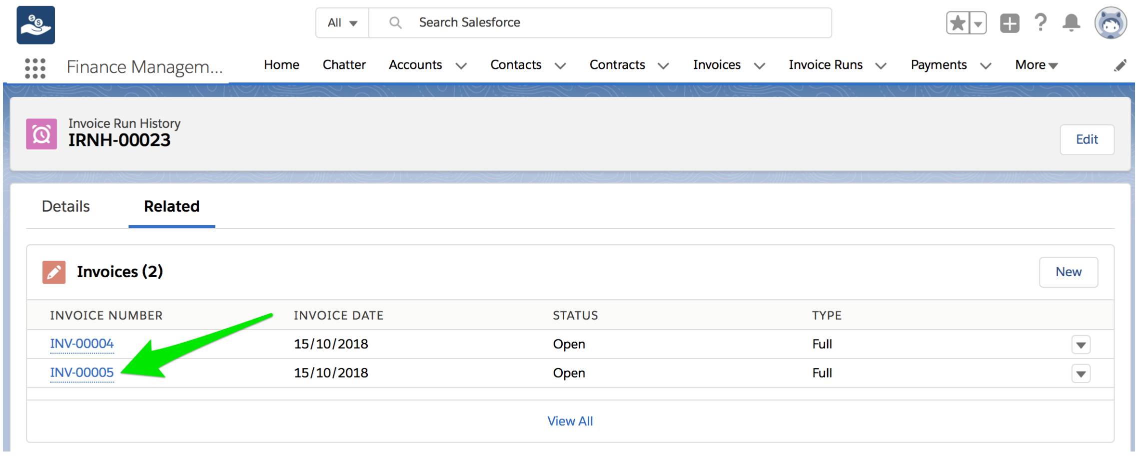
2. From the **Invoice Run History** section, select the **Invoice Run History Number**.



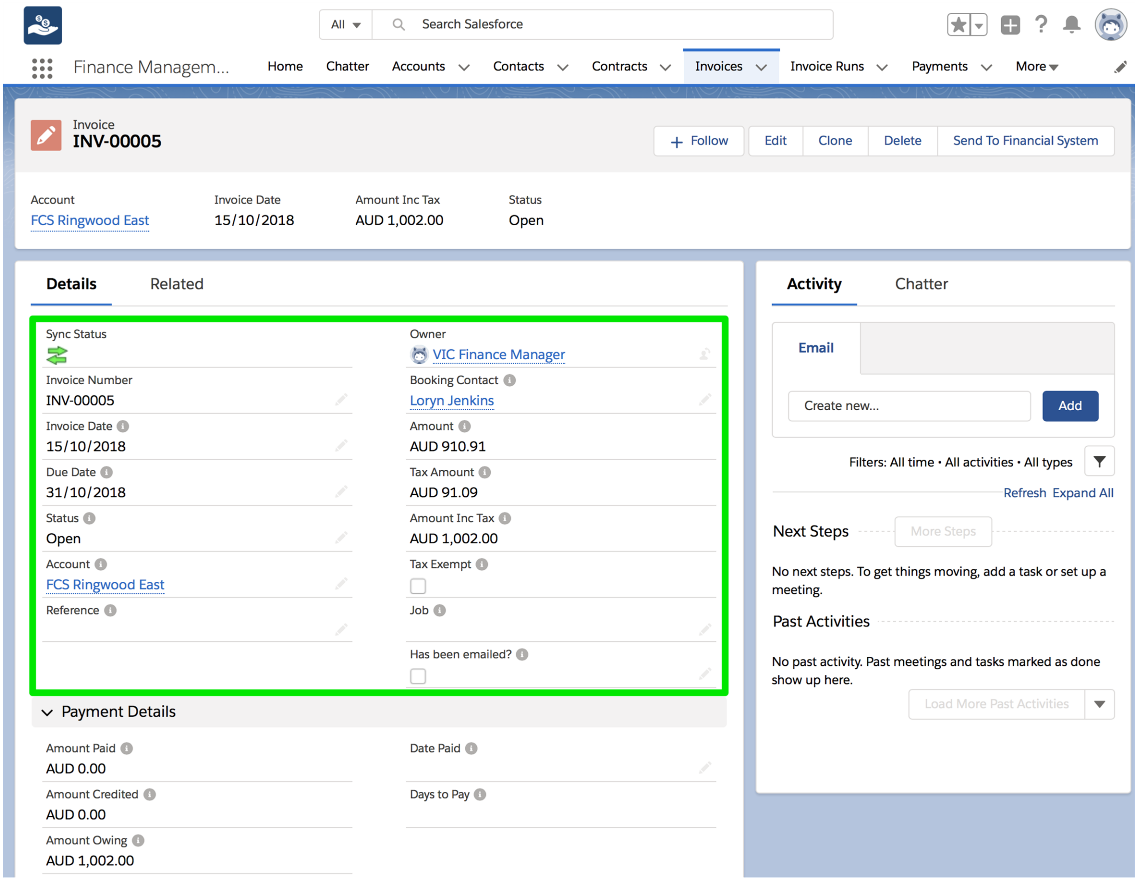
3. From the **Invoice Run History** record, select the **Related** tab.



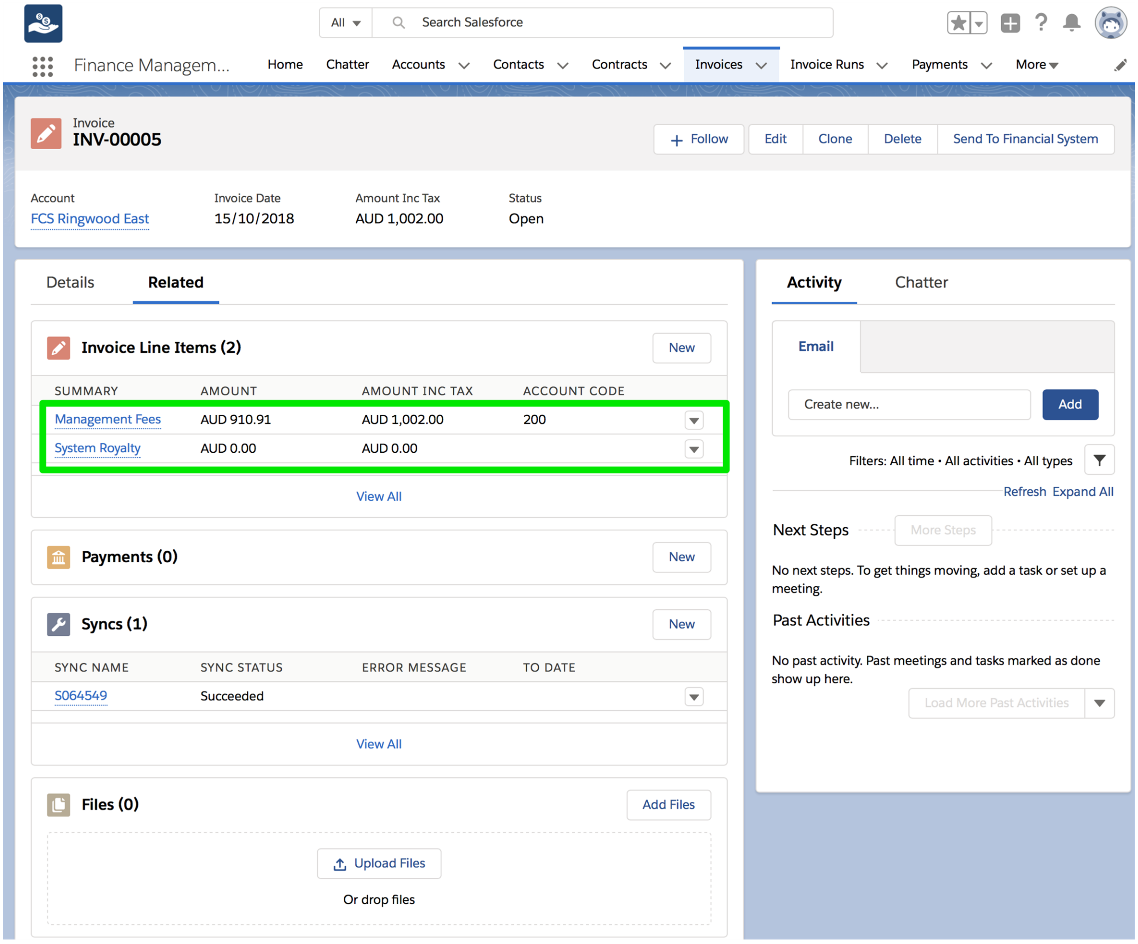
4. To view the details on any invoice, click on the **Invoice Number**.



5. The invoice summary is available from the **Invoice Details** tab.



6. Each individual **Invoice Line Item** is available from the **Related** tab.

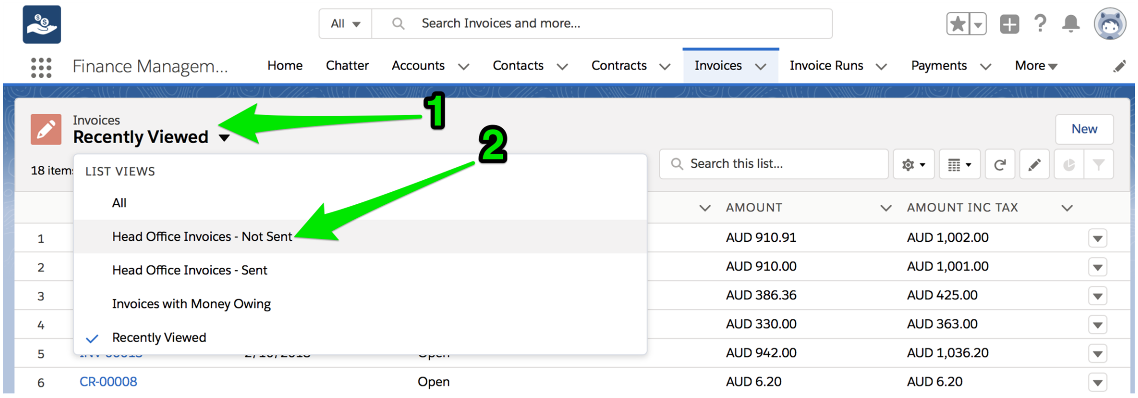


How to mass email invoices

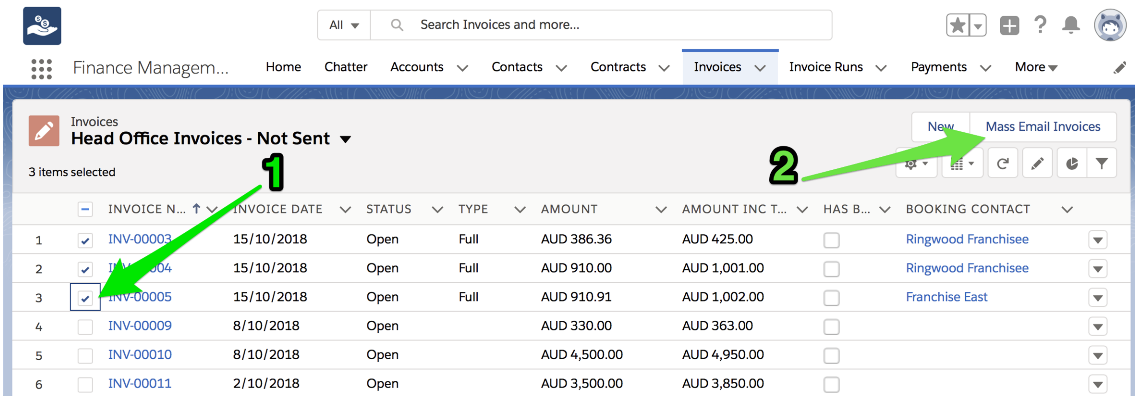
Finance Management can send an entire batch of emails to franchisees simultaneously.

To mass email invoices

1. From the **Invoices** tab, select the **Head Office Invoices - Not Sent** list view.

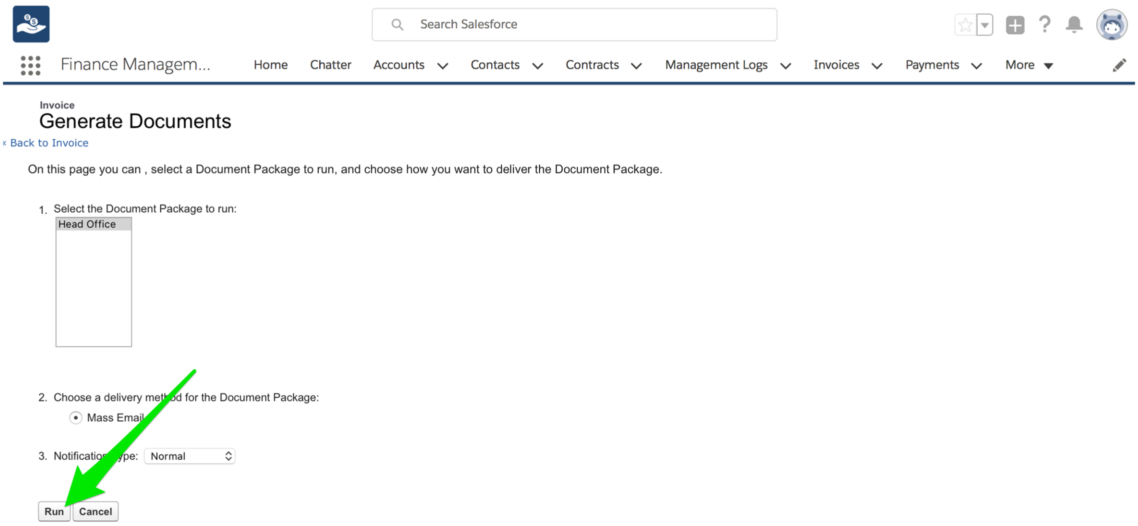


2. Now select each invoice that you want to send, then press **Mass Email Invoices**.



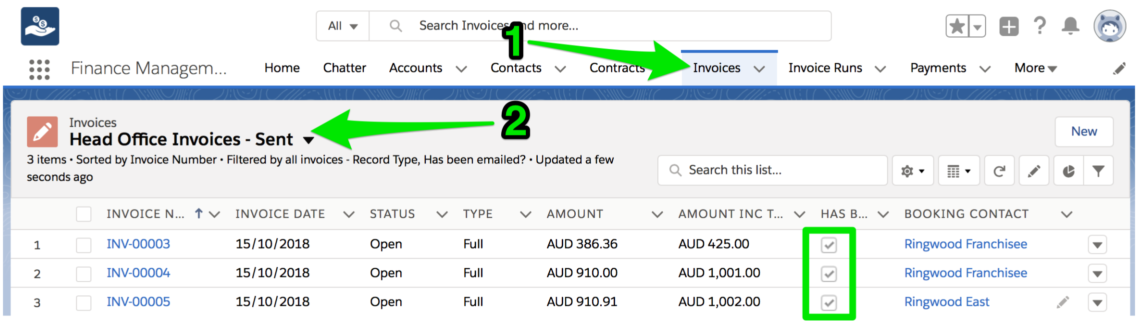
The **Invoice Generate Document** page appears.

3. Press **Run**.



Finance Management indicates that it is processing the requests. It displays a dialog box, then displays the Home page.

4. You can confirm that the emails have been sent by going back to **Invoices** and selecting the **Head Office Invoices - Sent** list view.



How to manage multiple invoice cycles

Here are some common recipes for configuring contract fees and invoice runs.

To create a single invoice run per month

You create a monthly invoice run with two invoice sources:

- An expense source
- A contract fee source

You set up both sources so they are unfiltered. That way all contract fees and expenses are captured, assuming that every contract fee is in fact set up for a monthly cycle.

This recipe requires all fees in the franchisee contracts to have a monthly cycle.

To create invoice runs with multiple cycles

You may have a weekly invoice and a monthly invoice.

In this case, you create two invoice runs. One invoice run is set to a weekly cycle, and the other to a monthly cycle.

You can configure one or both of the invoice runs to collect expenses. If you want to filter by expense category, you can choose to do so. Without filtering, expenses that are due will be charged on the first available cycle configured to collect expenses. An expense is never invoiced twice.

Both invoice cycles will be configured with contract fee sources. If the cycle is sufficient to distinguish the fees, then you can leave the contract fee source unfiltered. Otherwise, filter them to ensure the correct fee category is picked up by each invoice run. Where either of the invoice runs draw from multiple categories, you must add one invoice source per category.

To create invoice runs with the same cycle that are issued at different times in the month

Sometimes you might have a monthly invoice in the first week of the month, with another monthly invoice mid-month.

In this case, you create two invoice runs, both of which are set to monthly cycles.

Either one or both of the invoice runs can be configured with an expense source type.

Both of the invoice runs should be configured with a contract fee source filtered by the appropriate category. For example, the early-in-month invoice might be filtered for software subscriptions, while the mid-month invoice may collect management fees, royalties and expenses.

How to generate an invoice run ahead of time

You can generate invoice runs several days ahead of when you distribute the invoices. This allows you to check the invoice generation and perform any other necessary accounting procedures prior to sending the invoices.

To generate an invoice run ahead of time, ensure the `Generation Lead Time` is set correctly. *See* "How to configure an invoice run" on page 69. When you are ready to invoice the run, *See* "How to generate an invoice run" on page 76.

CHAPTER 6

Working with Invoices, Payments & Credit Notes

Understanding payments and credit notes

Finance Management allows you to record franchisee payments against invoices. You can also offer discounts and allocate payments using Credit Notes and Credit Allocations.

> Finance Management can optionally integrate with the Xero accounting software.

Using Credit Notes with Financial Integration

If you have chosen to use financial integration with Xero (and have created an active connection to Xero) we recommend:

Do what	Where	Next action
Create invoice	Finance Management	Invoices created in Finance Management are automatically and instantly sent to Xero.
Create credit note	Finance Management	Credit notes created in Finance Management are automatically and instantly sent to Xero.
Allocate credit to invoice	Xero	Allocations will be pulled back to Finance Management within 15 minutes, OR For instant update, from the invoice in Finance Management, press **Pull from Financial System**.

Using Credit Notes in Finance Management

If you elect to not use Financial Integration, you can enter create invoices, enter payments, create credit notes and allocate credit to invoices all in Finance Management.

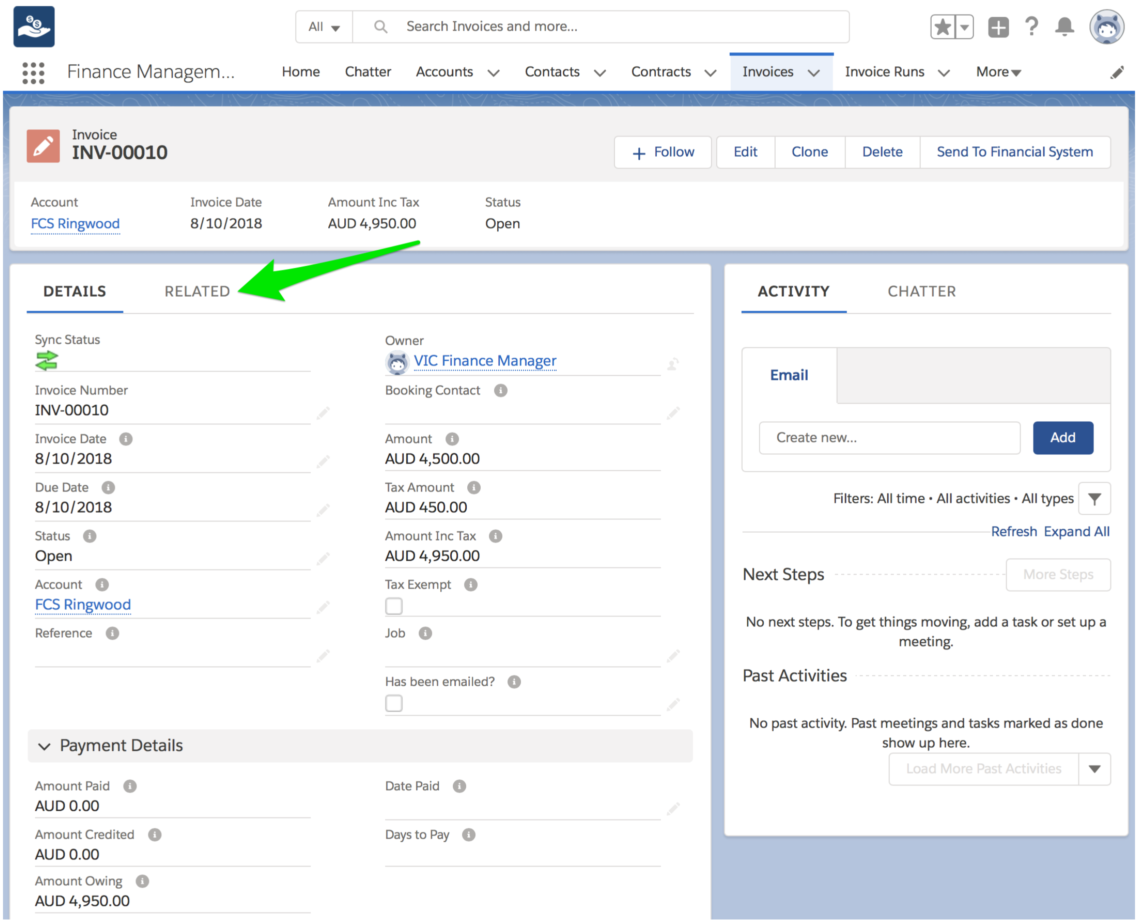
Payments

How to record a payment

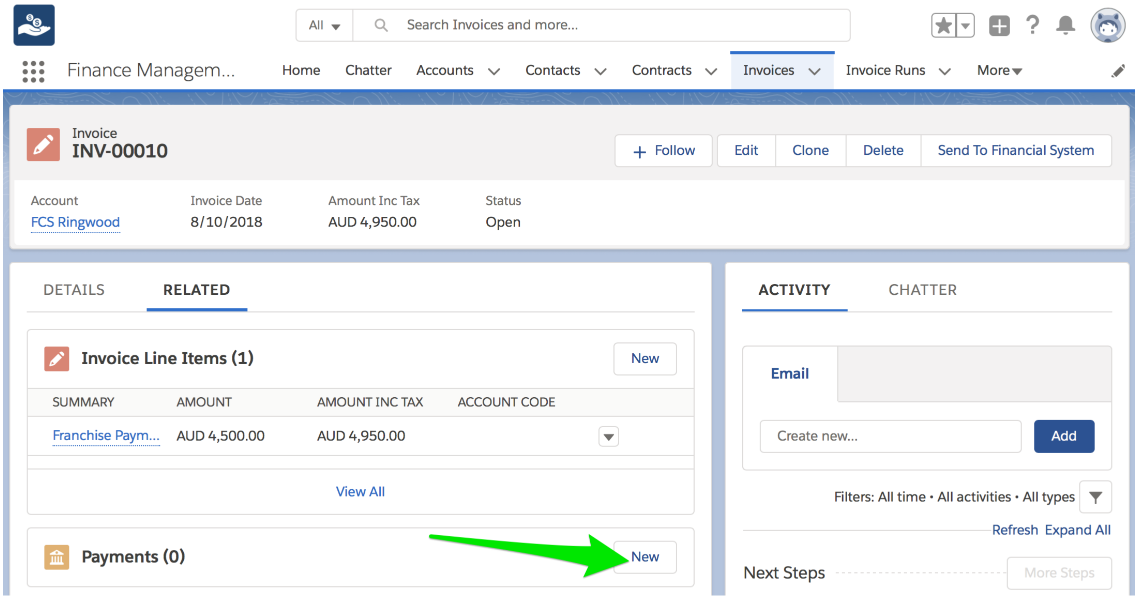
It is preferable to record your payments in Xero if you are using financial integration. Any payments recorded in Xero will be pulled back to Salesforce (generally within 15 minutes). You can immediately retrieve changes to payment by manually choosing the **Pull from Financial System** button.

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 franchise, then you record the payment against the invoice.

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

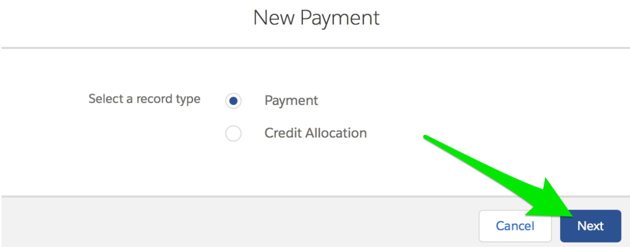


2. From the **Payments** section, press **New**.



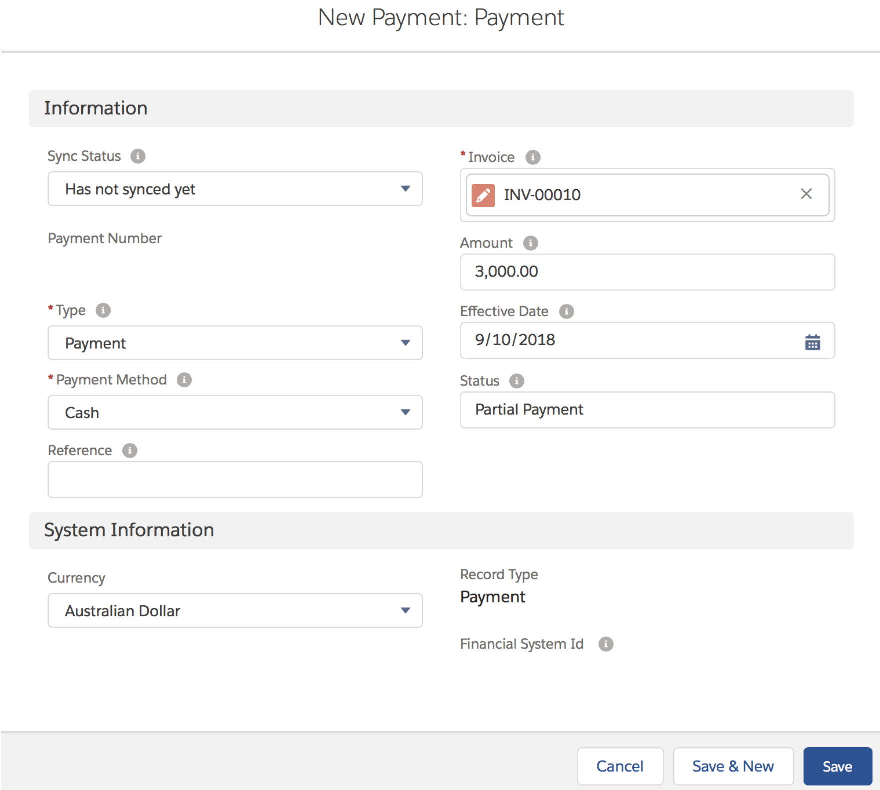
The **New Payment** dialog box appears.

3. Press **Next**.

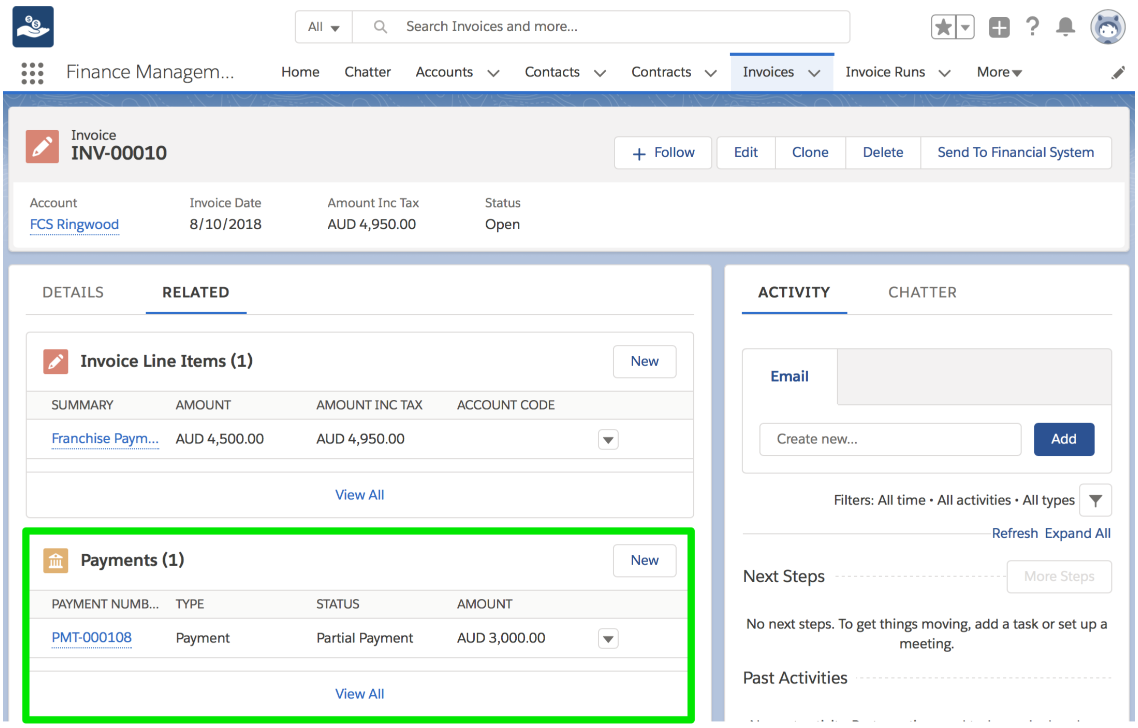


The **New Payment** dialog box appears with `Invoice` automatically selected.

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



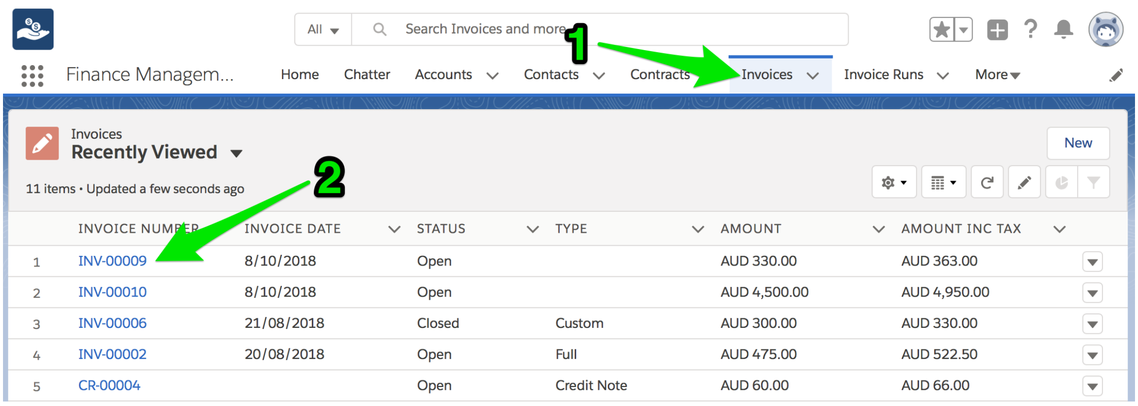
5. The New Payment dialog box is saved and the payment appears on the Invoice.



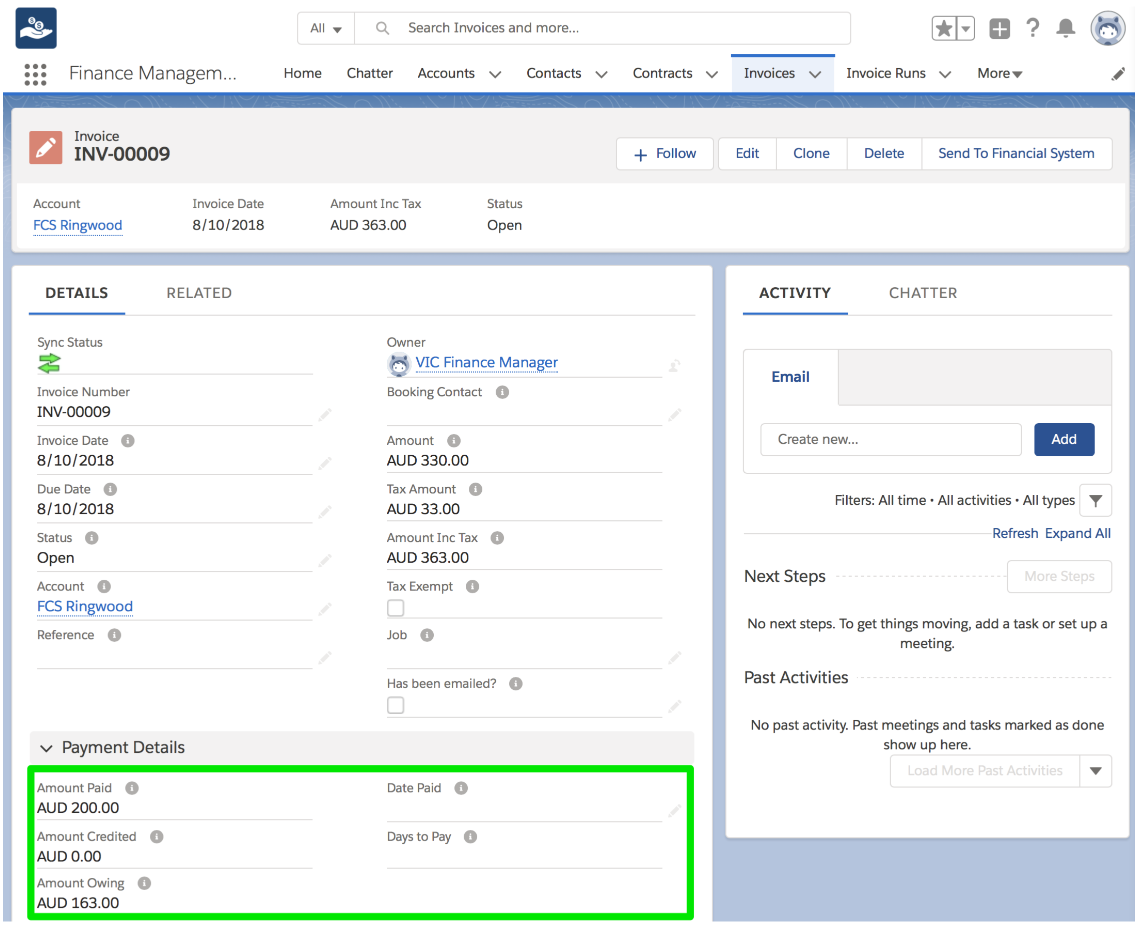
How to review payments for an invoice

To understand the status of payments on an invoice

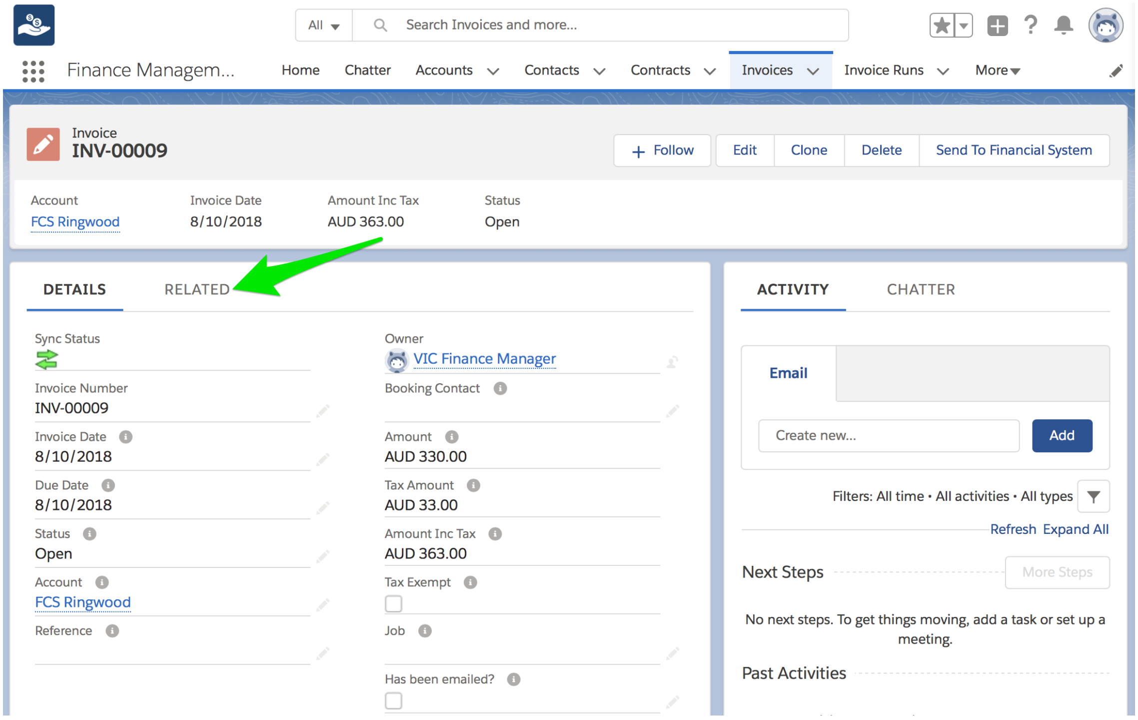
1. From the **Invoices** tab, open an **Invoice**.



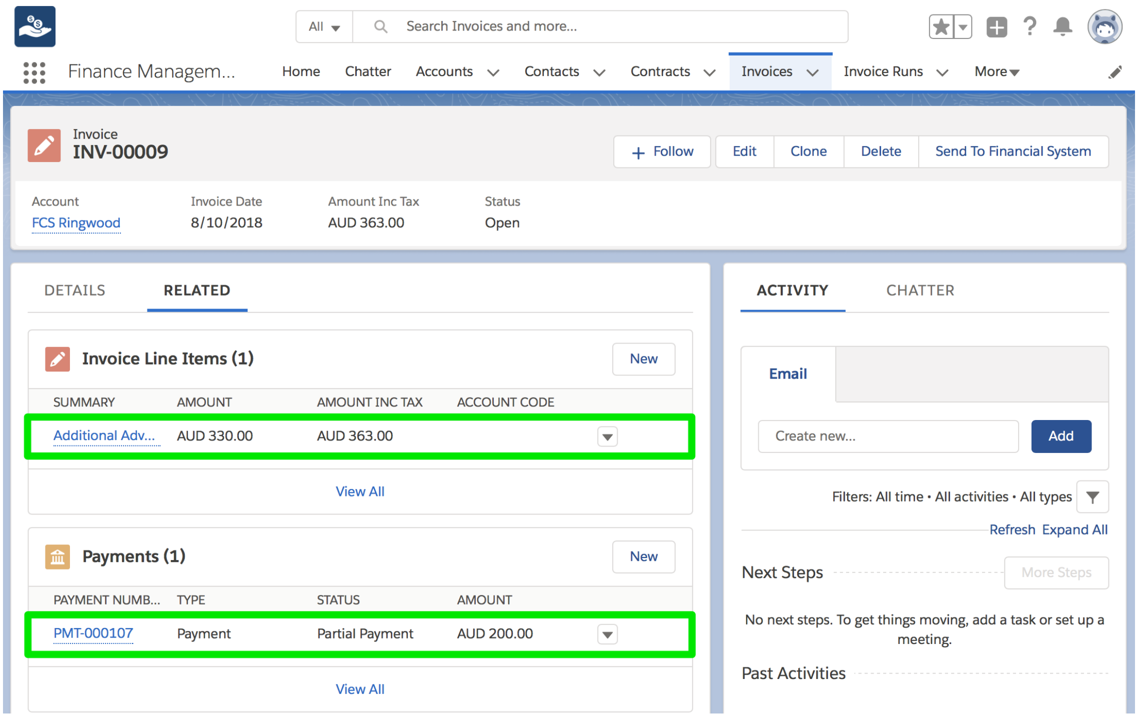
2. For a summary of the current payment status, from the Invoice review **Payment Details**.



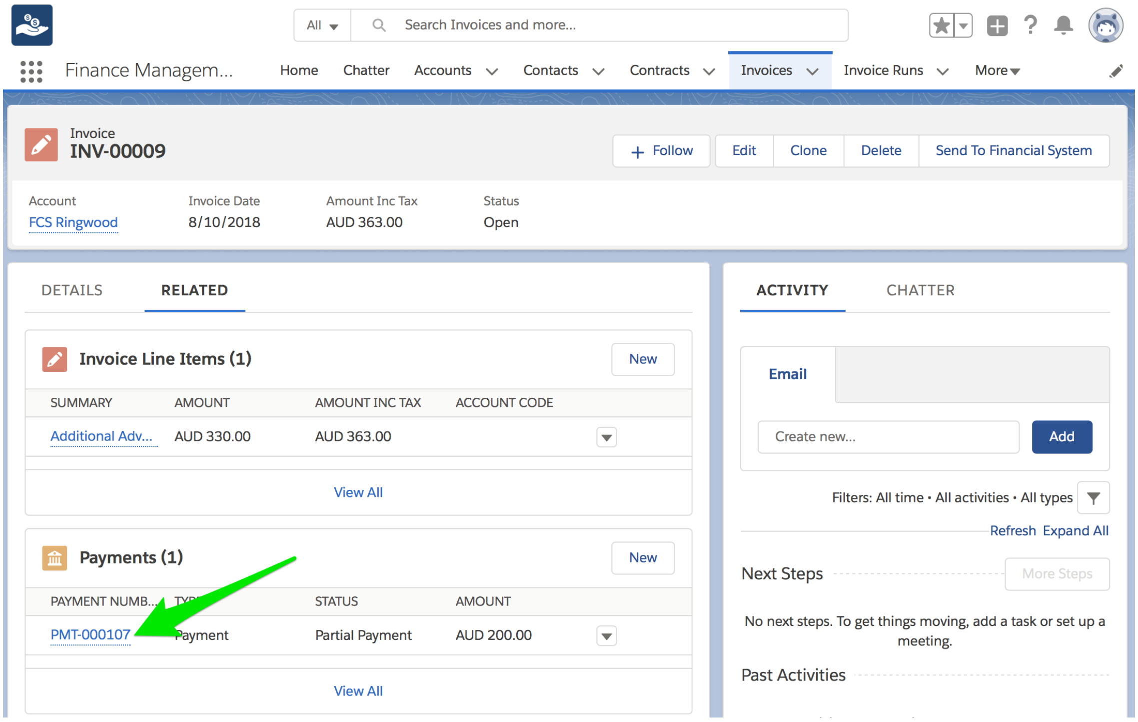
3. To check the detail behind the current status, select the **Related** tab.



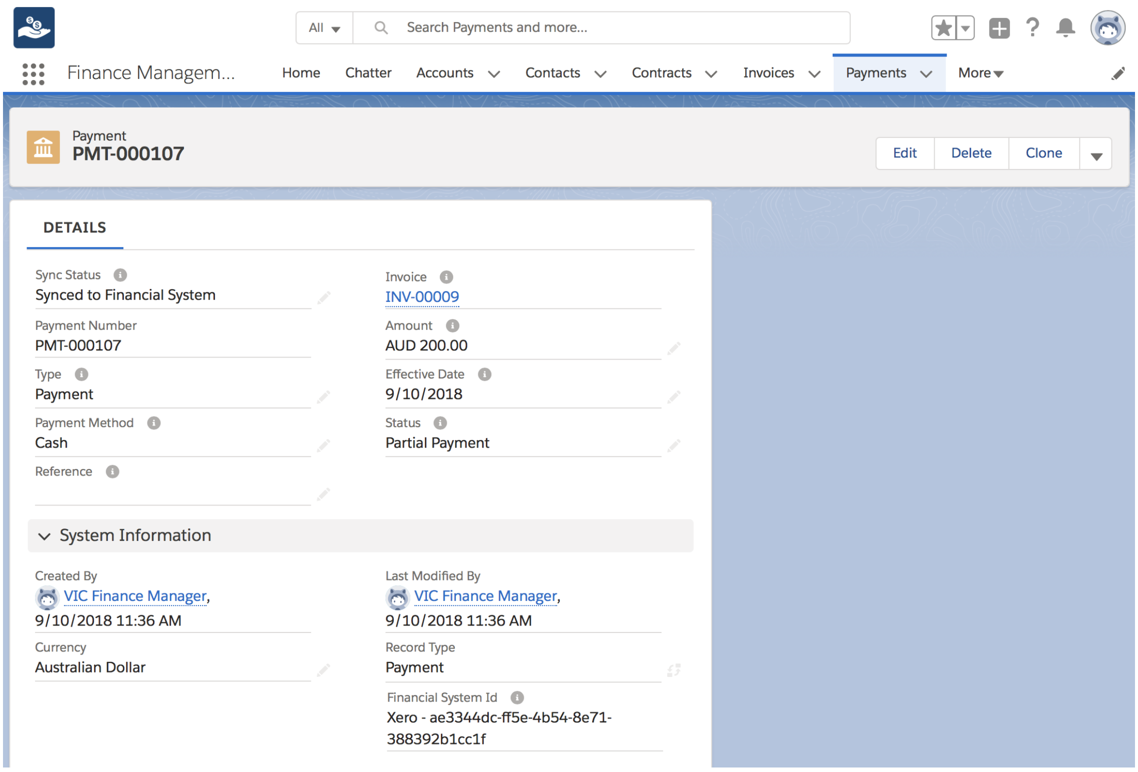
Now you can see both the **Invoice Line Items** comprising the invoice, and the **Payments** allocated towards it.



4. To check further payment details, select the **Payment Number**.



The **Payment Details** display.



Credit Notes

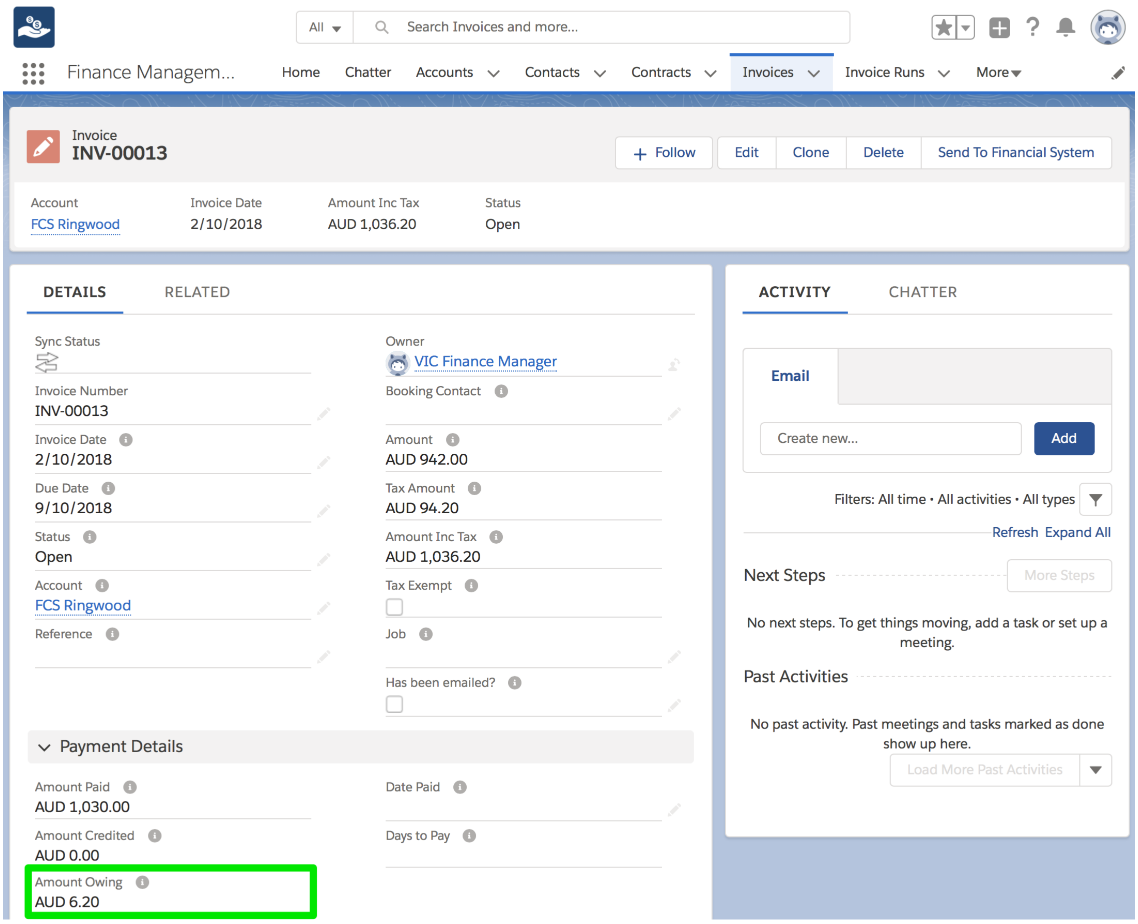
How to discount an invoice using a credit note

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 franchisee pays in cash
- You may choose to use this feature in the case of incentives for rapid payment, or
- You may use this to correct errors in previous billing cycles.

To provide a discount on an invoice

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



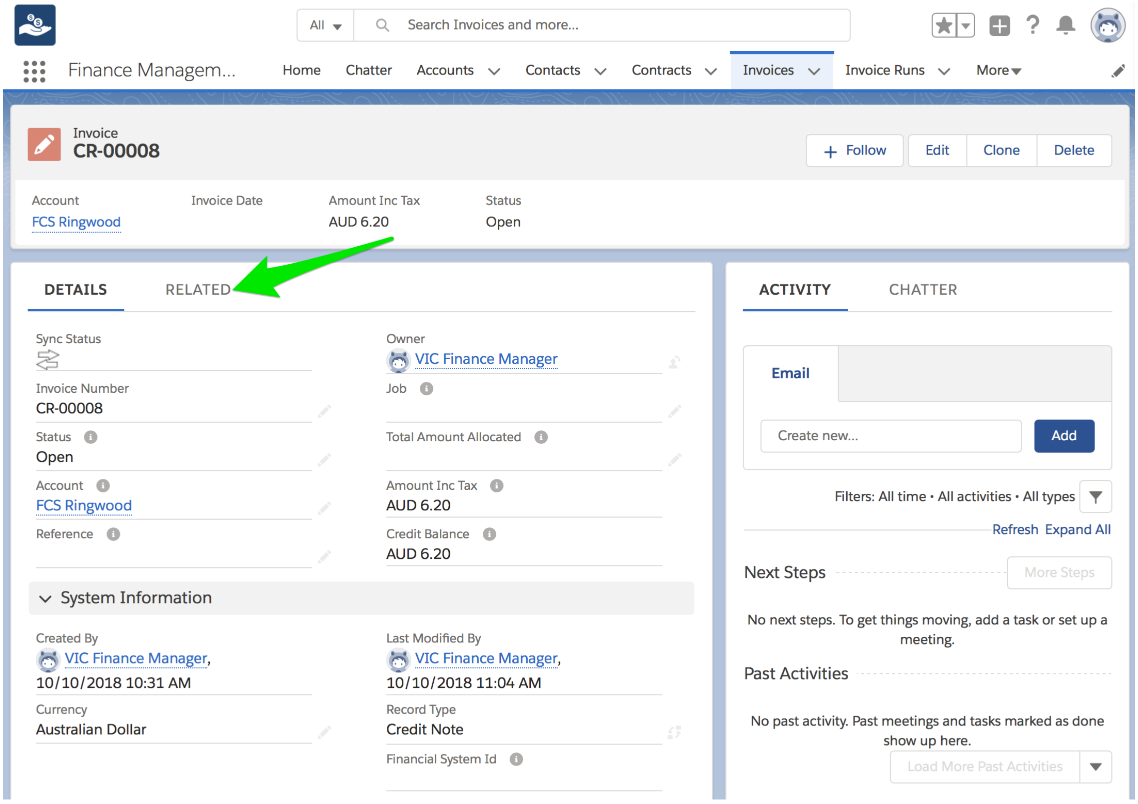
You now need to create a new invoice as a **Credit Note**.

How to allocate credit to an invoice

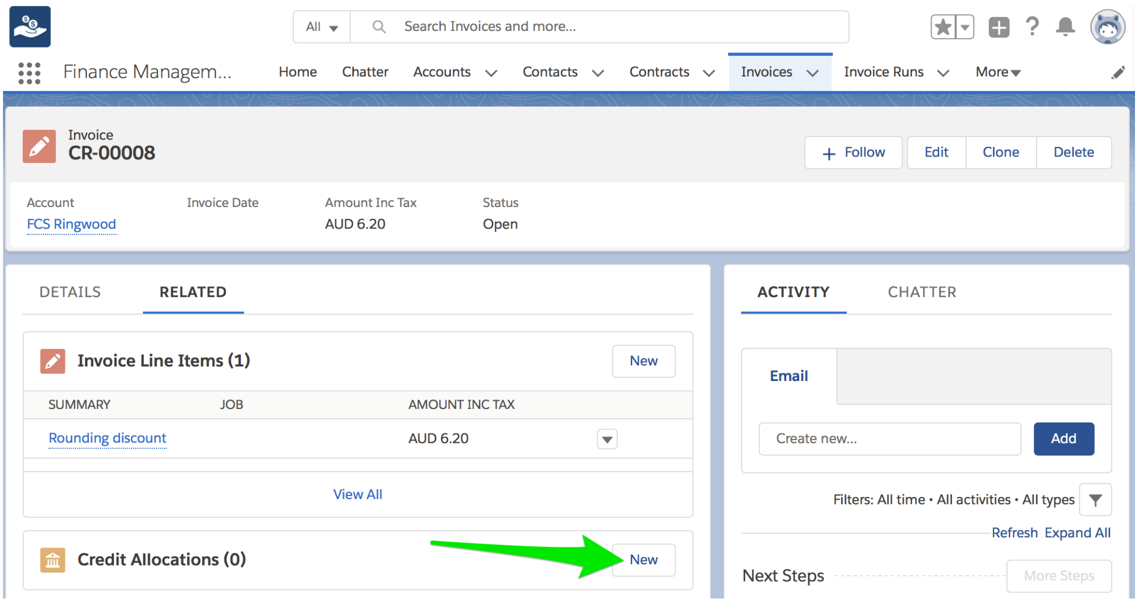
When you issue a credit note, you generally need to allocate it to an invoice.

To allocate a credit note to an invoice

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

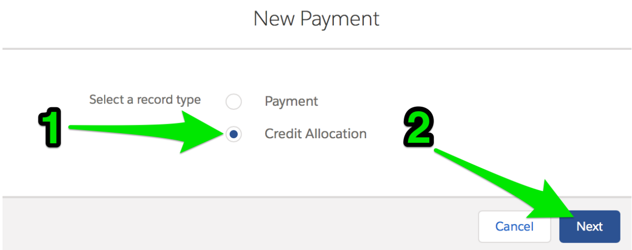


2. From the **Credit Allocations** section, press **New**.



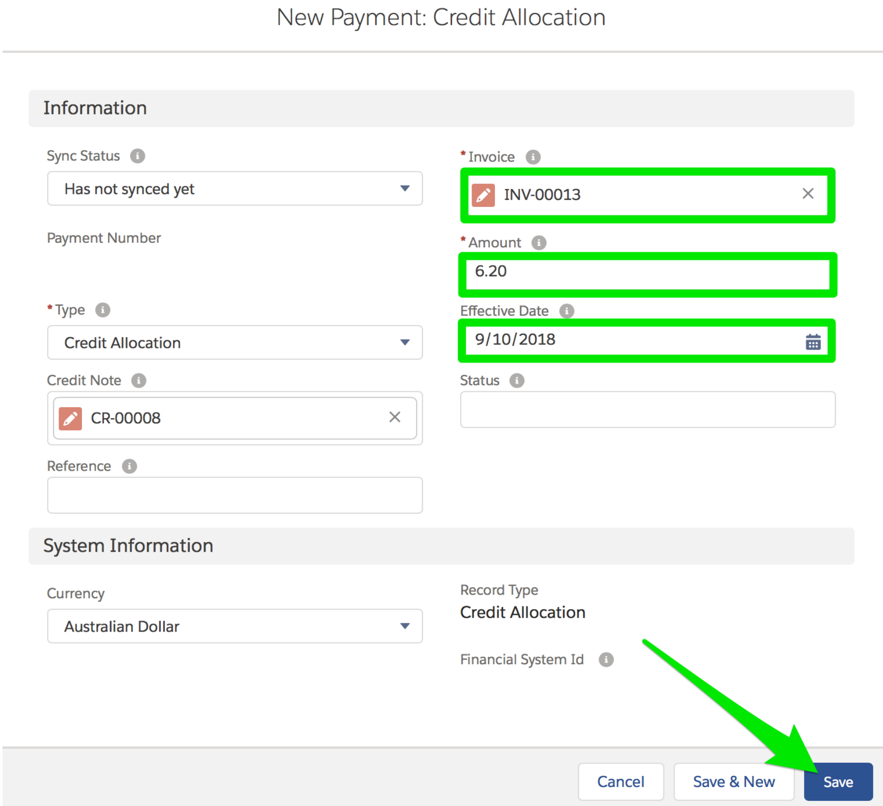
The New Payment dialog box opens.

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



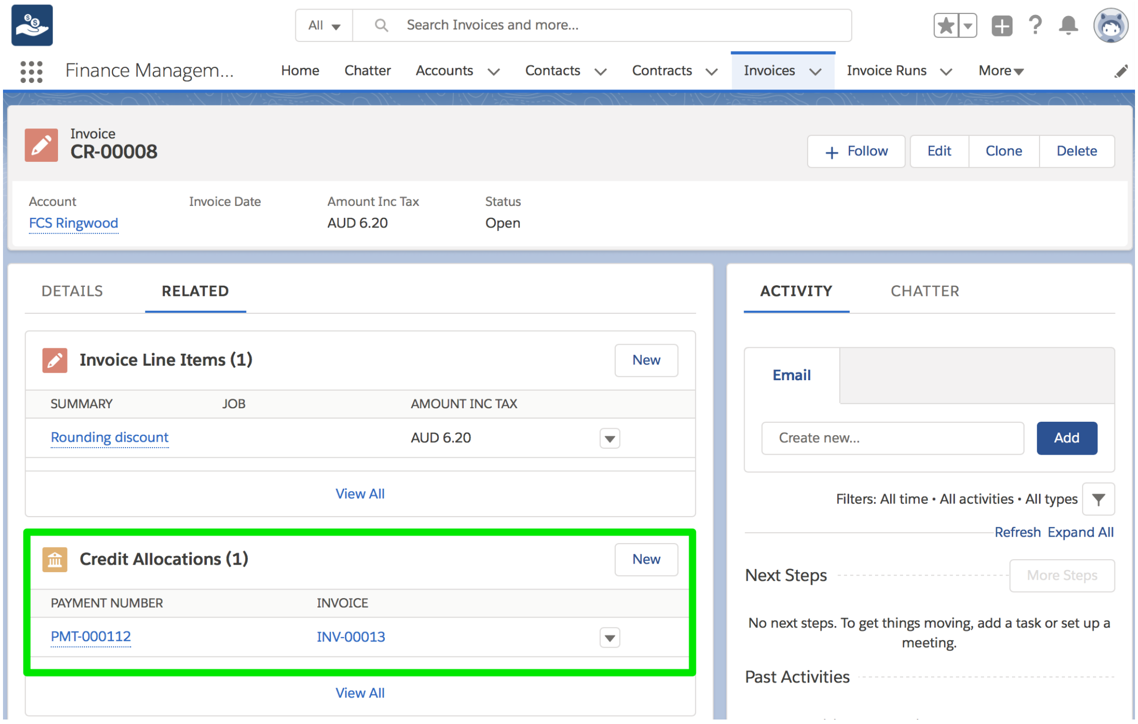
The **New Payment: Credit Allocation** dialog box opens.

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

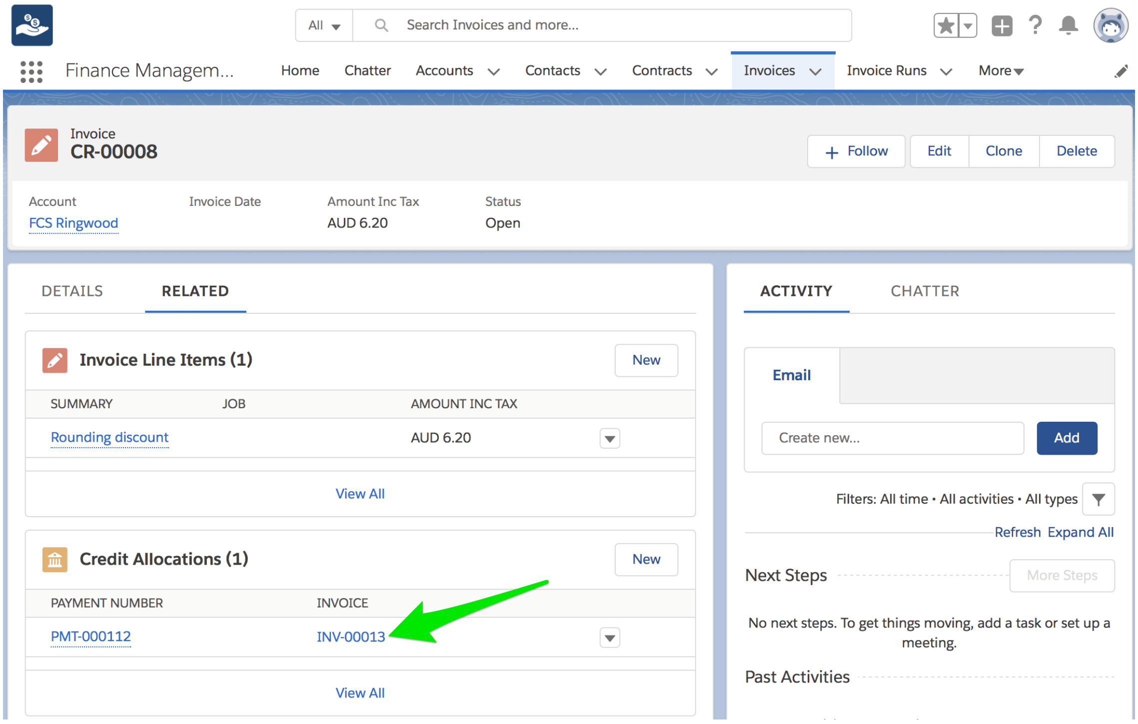


> Depending on the underlying payment method, you may find it useful to include a transaction number in the `Reference` field or to assign a `Status`.

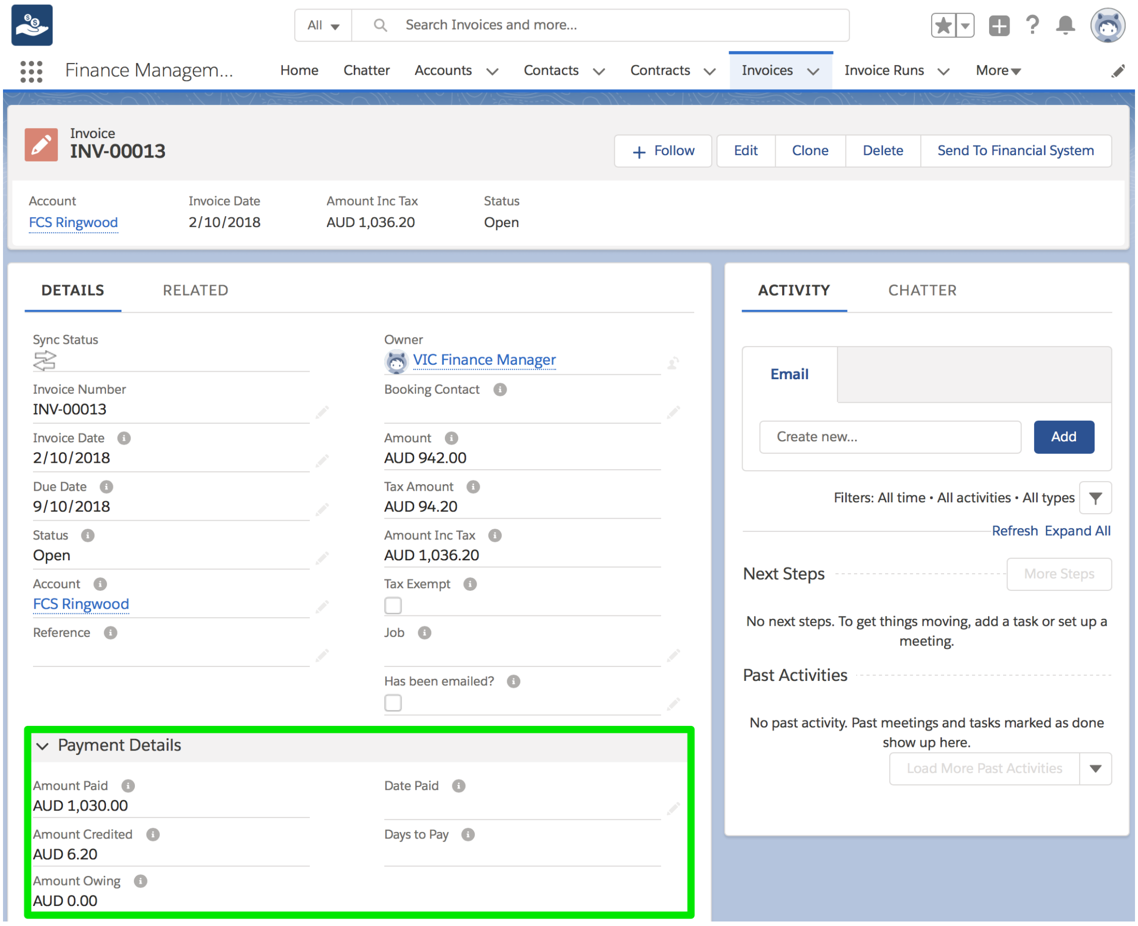
5. The credit invoice is now allocated as a payment against the customer invoice.



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.

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 95.
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 95.
3. Repeat allocation steps 2 through 4 until you have allocated the entire value of the credit note.

CHAPTER 7

Xero Integration

Understanding Xero integration

Finance Management's Financial Integration provides the ability to connect Salesforce financial information with Xero. This allows franchisors to take advantage of the strengths of Salesforce and Finance Management, while also providing the financial reporting, controls and compatibility with software required by finance departments.

What data is exchanged

Finance 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 Xero account that is connected to , changes are replicated back to Finance Management in the next sync cycle. The frequency of the sync cycle is determined by the setting of the Master Franchise Profile Account's **Configuration Set**.

How to connect to Xero

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

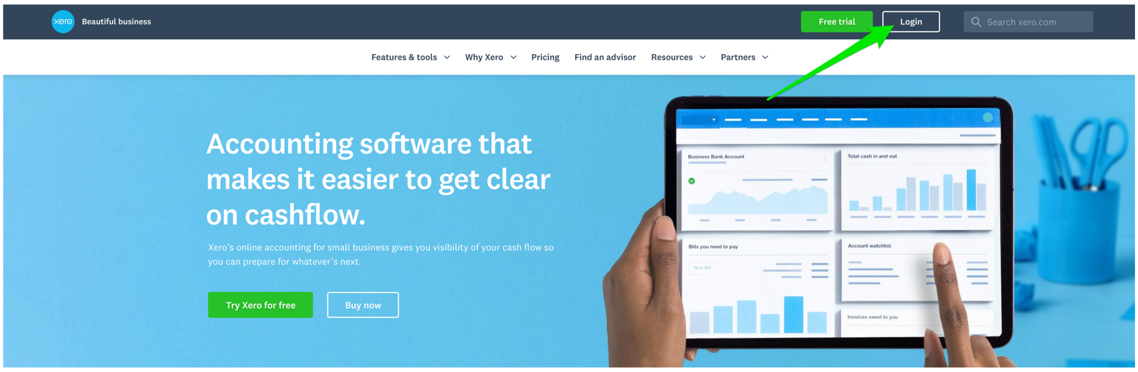
To connect your Master Franchise Profile Account to Xero

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

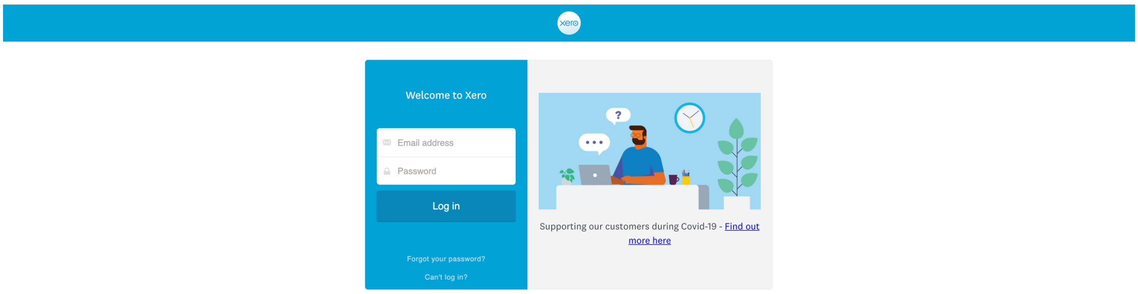
How to do this is described below.

To login to Xero

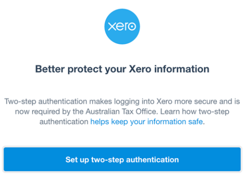
1. Go to the Xero website www.xero.com.au and click the **Login** button.



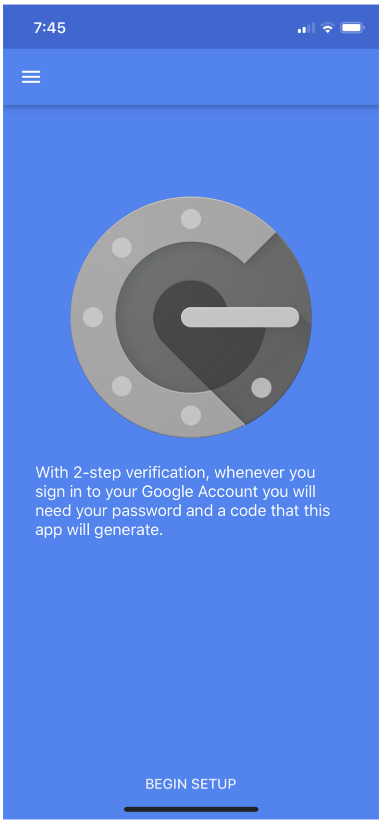
2. Now enter your `Email address` and `Password` then press **Log in**.



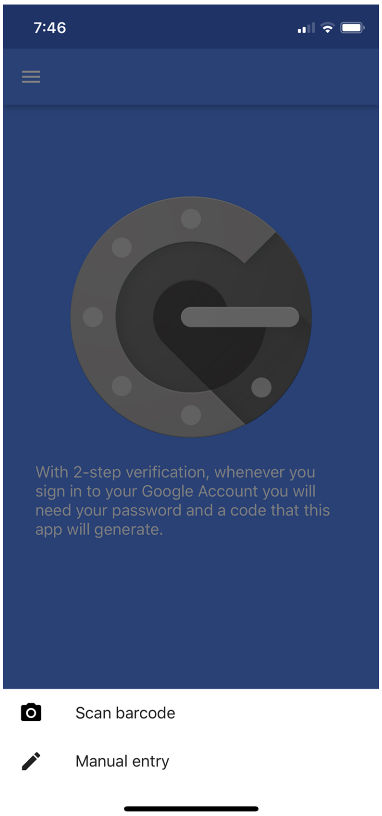
3. Xero may prompt you to set up two-step authentication. Press **Set up two-step authentication** to continue.



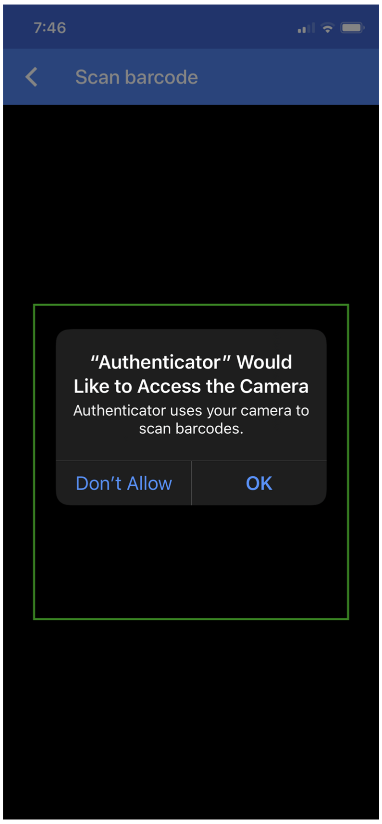
4. If you don't already have the Google Authenticator app on your mobile phone, go to the App Store (for iPhone) or Google Play (for Android) and download the Google Authenticator app.



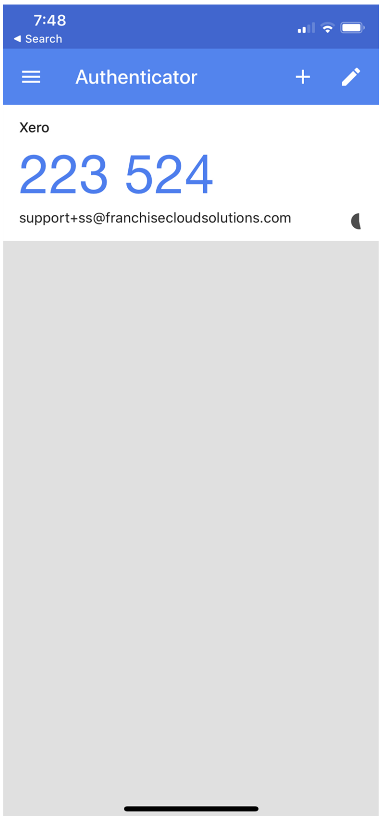
5. If this the first time you've used Google Authenticator, tap **Begin Setup** (otherwise, tap the **+** button) then tab **Scan barcode**.



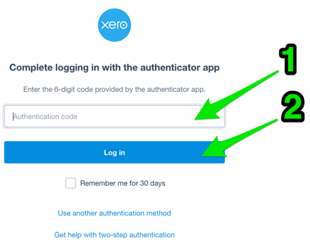
6. If this is the first time you've used Google Authenticator, you may need to grant permission to use your camera. Press **OK**.



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.



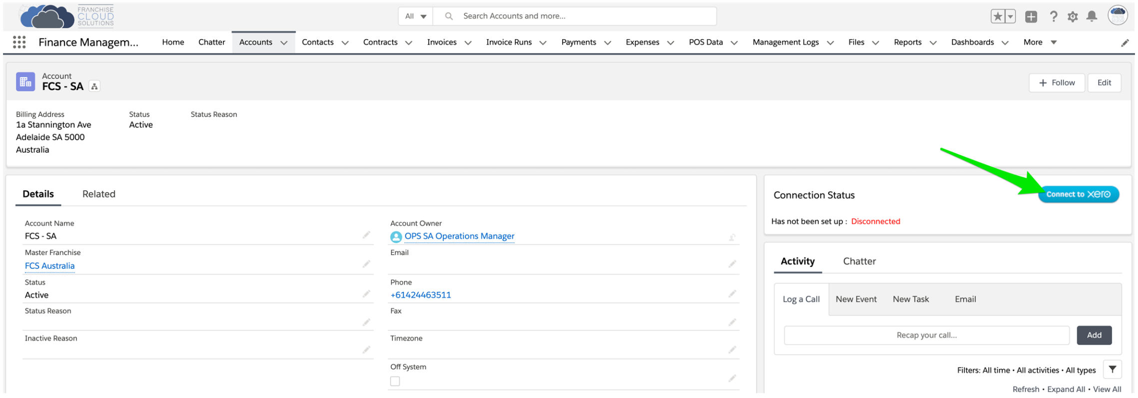
8. Enter the six digit code and press **Log in**.



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

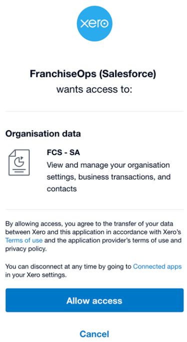
To connect to Xero

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



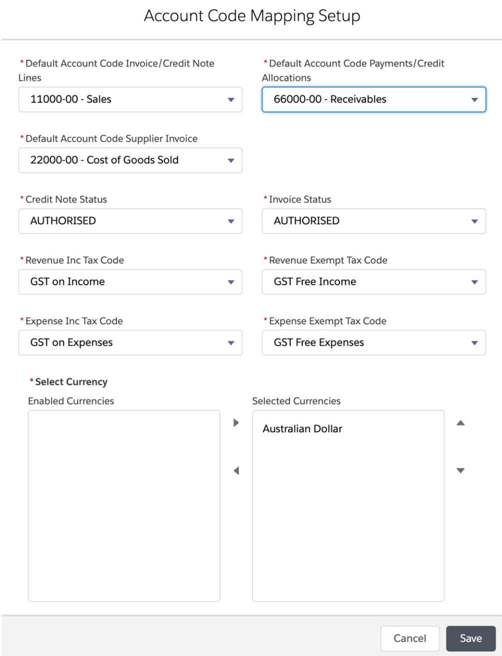
The **Welcome to Xero** login page appears.

2. Press the **Allow Access** button. Doing so gives permission for your Finance Management account to synchronize financial data with your Xero account. Changes and additions to data in Xero will be synchronized back into Salesforce.



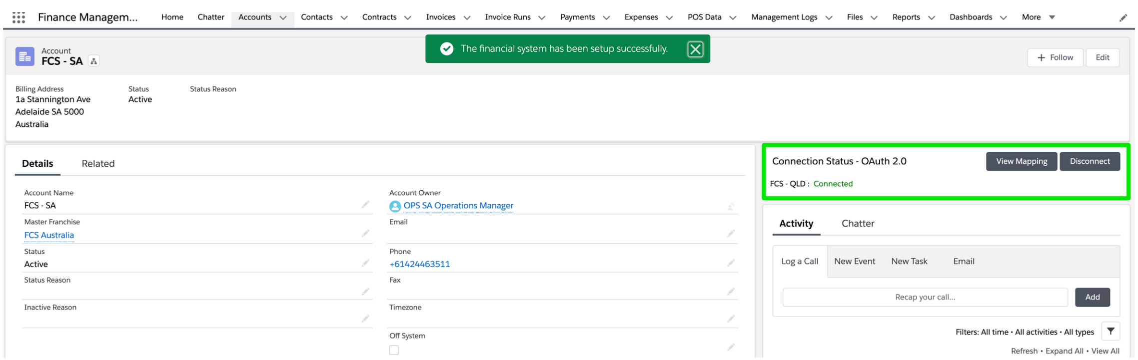
Your **Master Franchise Profile Account** displays and the **Account Code Mapping Setup** dialog box appears.

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 Finance Management is still pushing to the right accounts.

4. Your Finance Management account is now connected.



Now that your Xero account is connected, financial data you enter into Finance Management is automatically transferred to your Xero account. Information you enter into Xero is synchronized back to Finance Management periodically. How frequently this occurs depends on the sync settings configured against the Master Franchise Profile Account's **Configuration Set**. You may need to check with your system administrator to find how frequently this has been set.

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.

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. Finance Management works by pushing financial information to the financial system and then pulling it back.

Changes in Finance Management are immediately pushed to Xero.

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

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

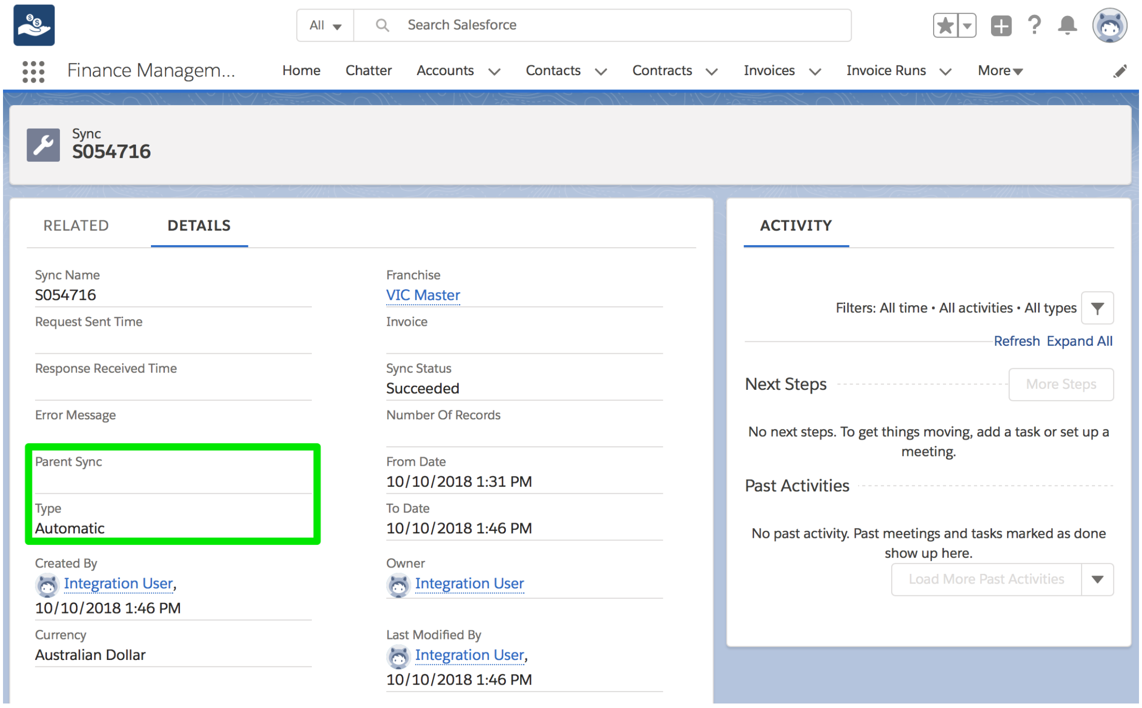
The following table describes the meaning of each sync status.

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

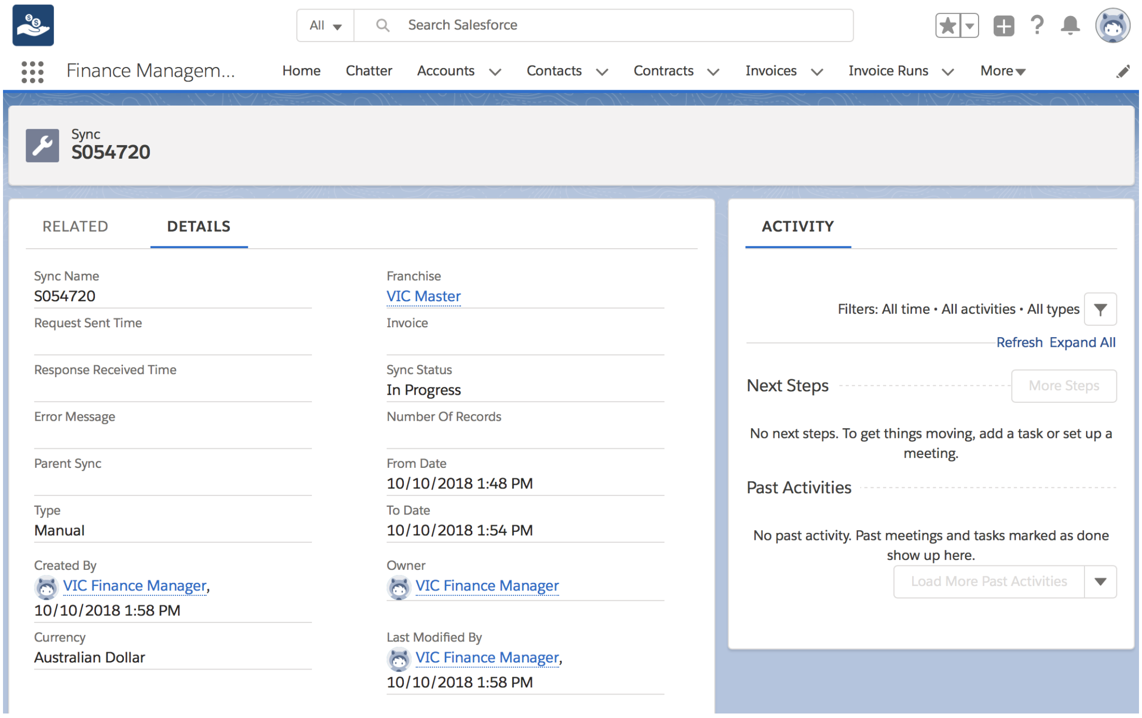
There are three types of Sync records.

» Automated Sync Request records.



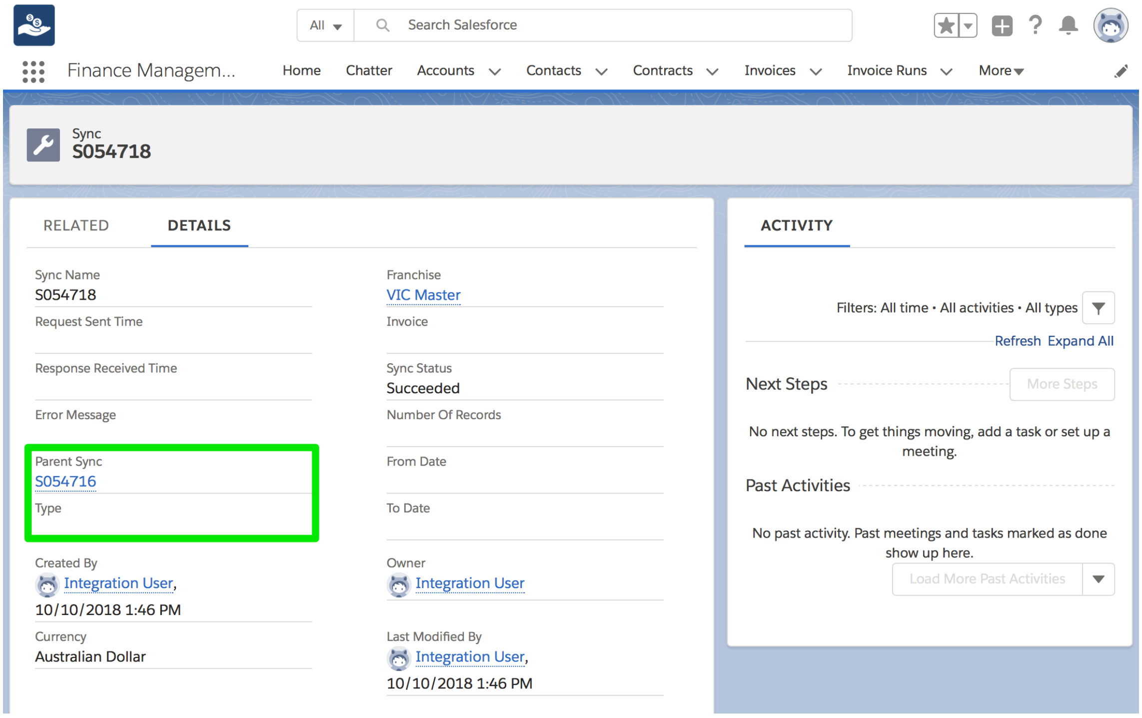
These are the automatic syncs that occur on the schedule set . They have no parent. You recognize an automatic Sync by looking at its `Type`. You recognize it as a Request record by observing that the `Parent Sync` field is empty.

- 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.

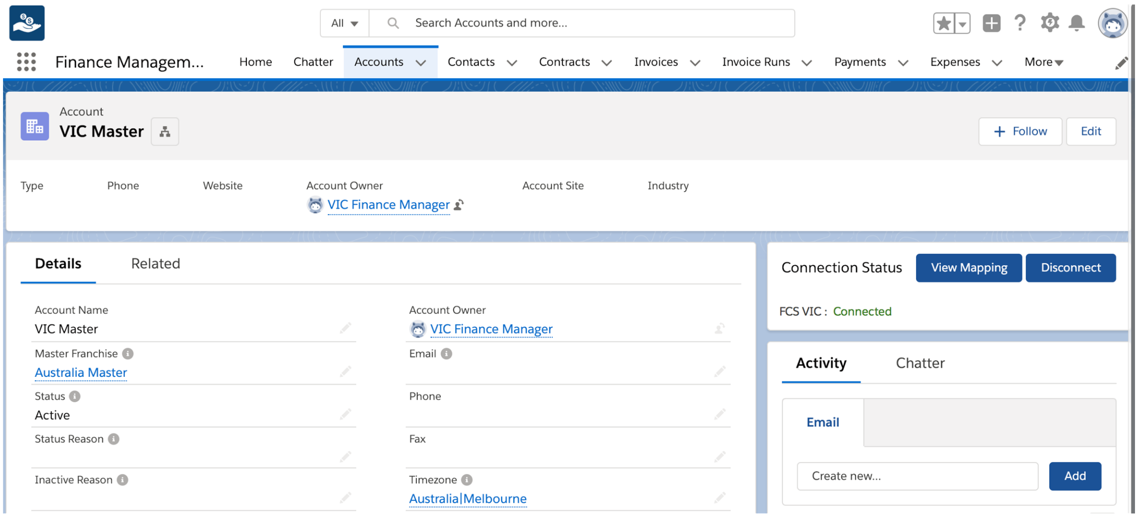
How to find the most recent sync

> This topic assumes you have connected your Xero account. *See* “How to connect to Xero” on page 103.

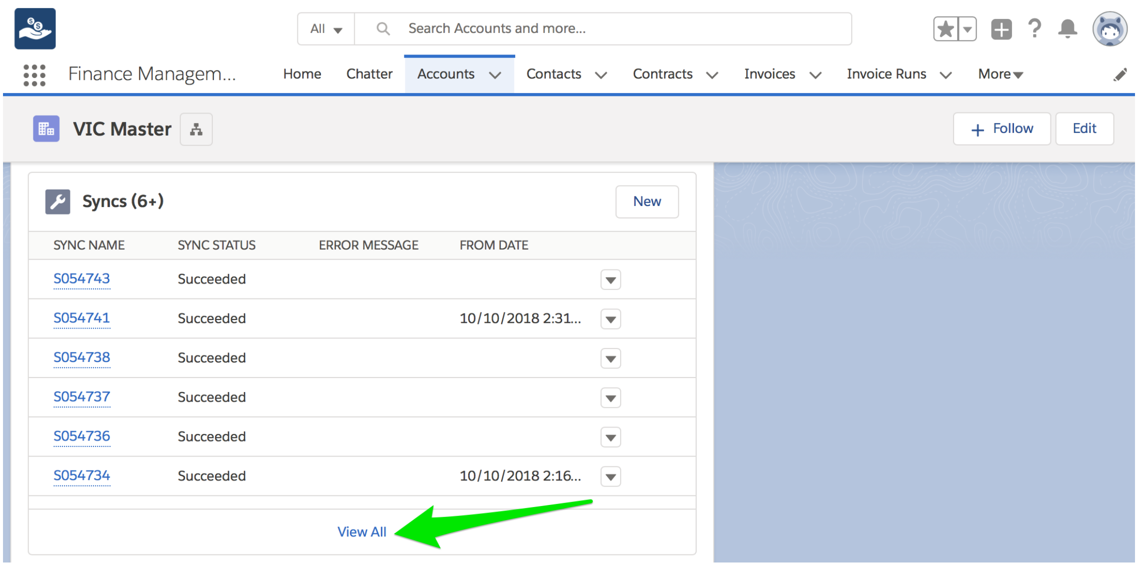
Synchronization occurs automatically based on a schedule configured by your franchisor. Syncs can also be manually initiated by system administrators. You can check the most recent sync history from your Account.

To check the most recent sync period

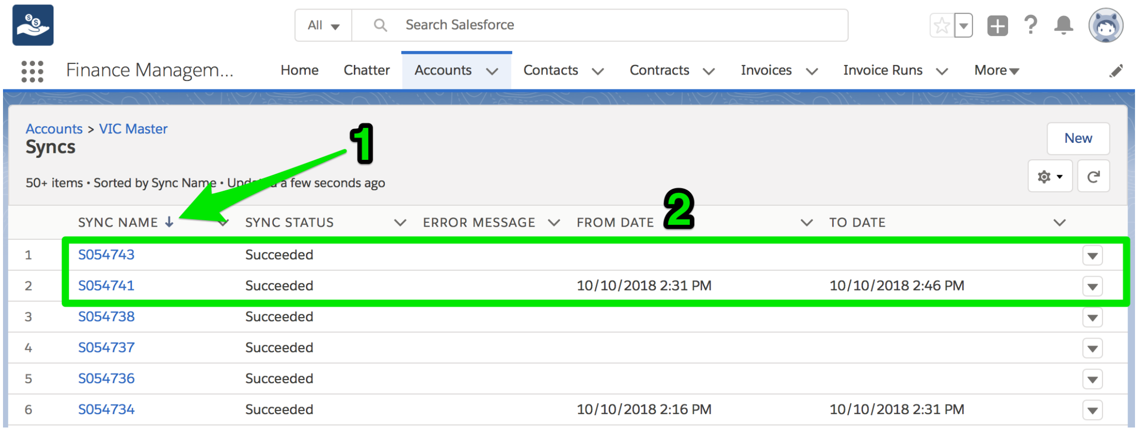
1. From your **Account**, select the **Related** tab.



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.

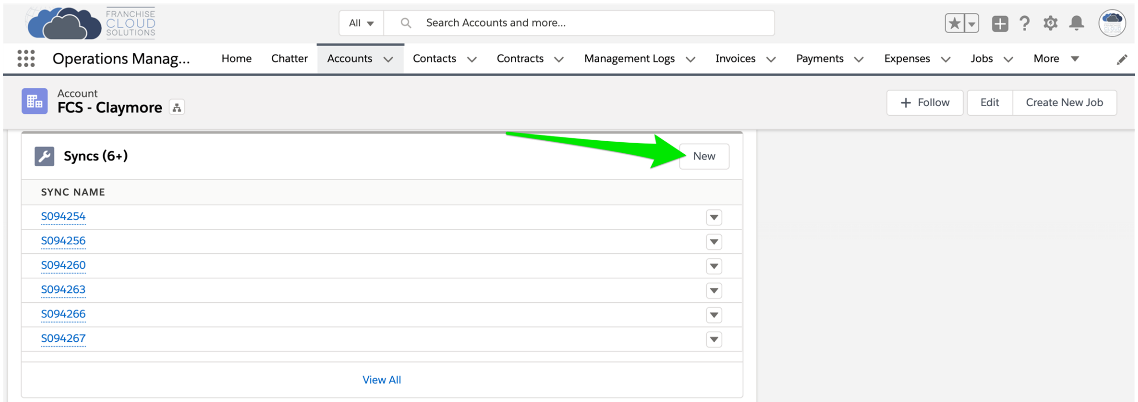
How to prevent historical syncing

When you are syncing a new Franchise Profile Account or Master Franchise Profile Account with a Xero account that has extensive history, you will often need to prevent the system from attempting to sync the entire history.

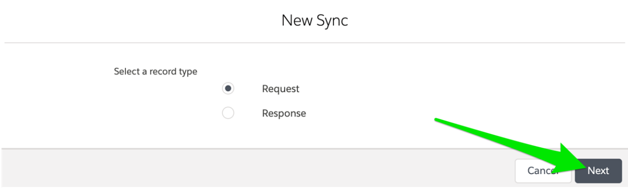
> Attempts to sync a long-lived Xero account with a newly created Franchise Profile Account will usually result in syncing errors. You need to limit the sync to the period in which the Franchise Profile Account has records relating to the Xero account.

To prevent historical syncing

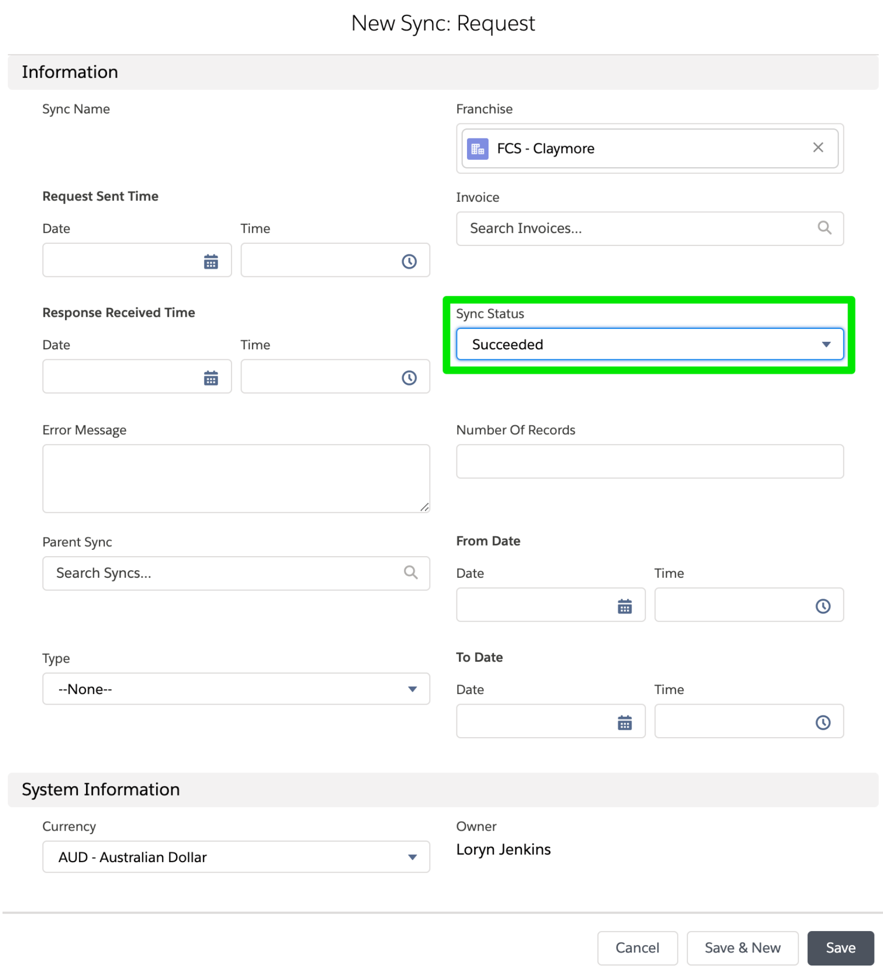
1. From the **Franchise Profile Account**, find the Syncs section and press **New** (button is on the **Related** tab).



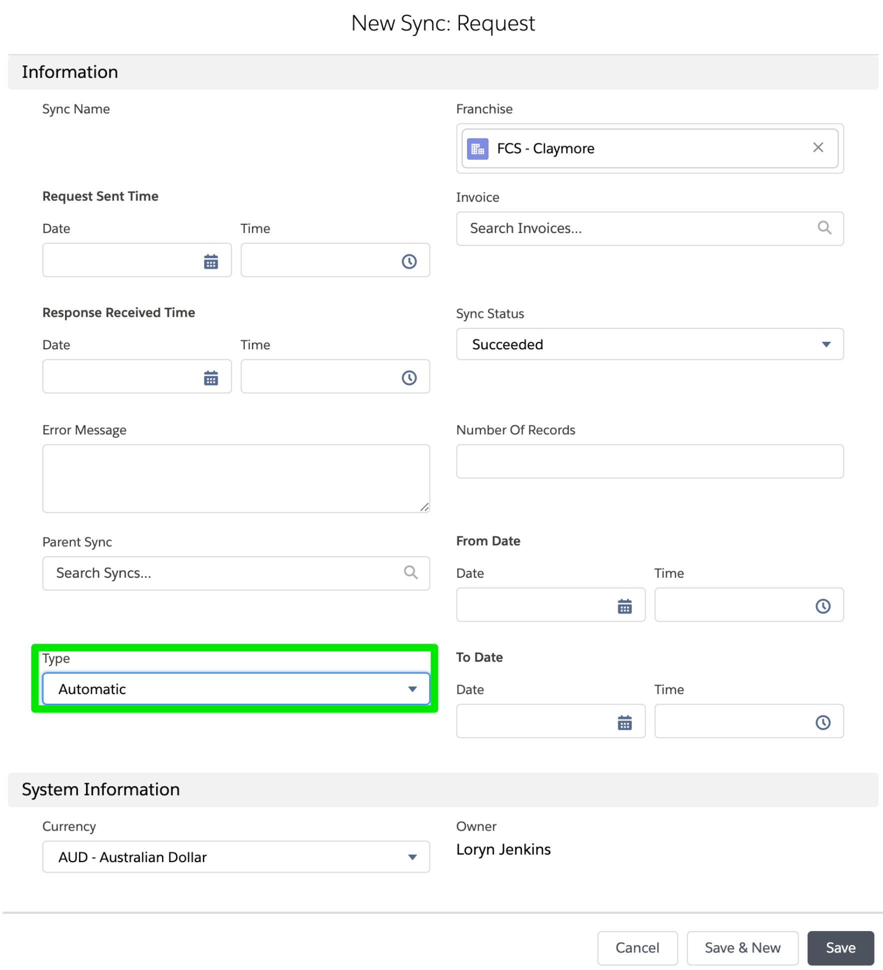
2. From the **New Syncs** dialog choose `Request`.



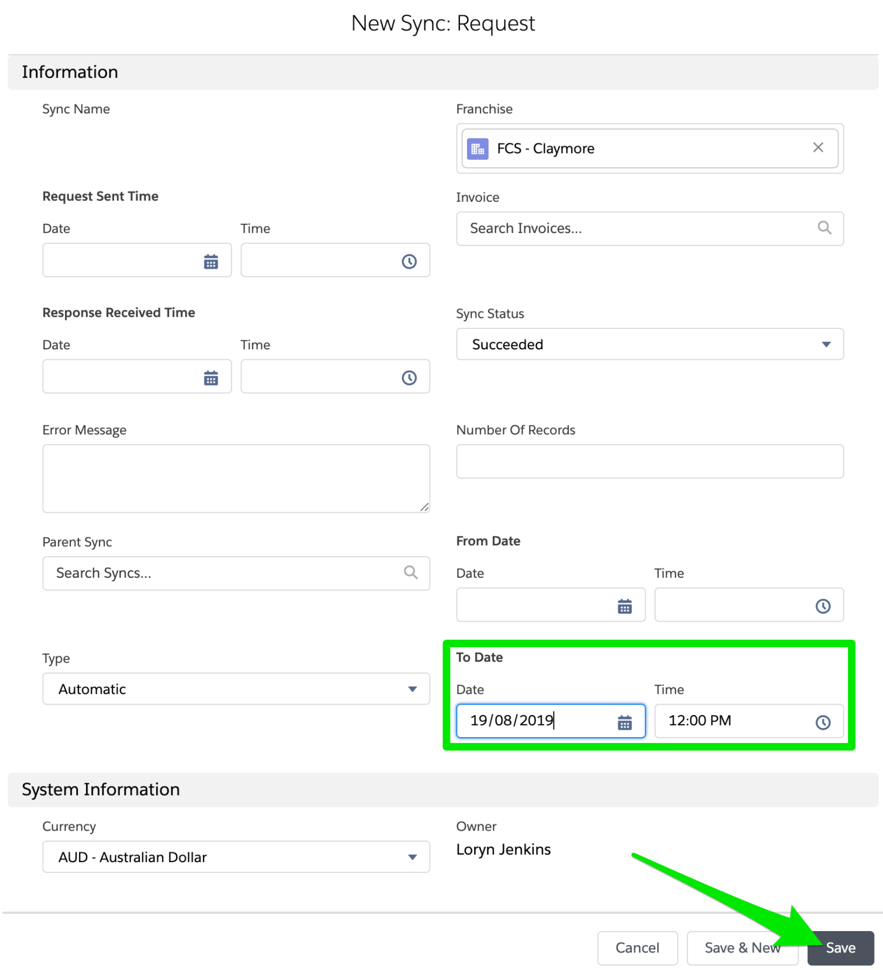
3. Set the `Sync Status` to *Succeeded*.



4. Set the `Type` to *`Automatic`*.



5. Set `To Date` to a relatively recent date (e.g. yesterday or today), then press **Save**.



This will prevent automatic syncing from attempting to sync prior to the specific `To Date`.

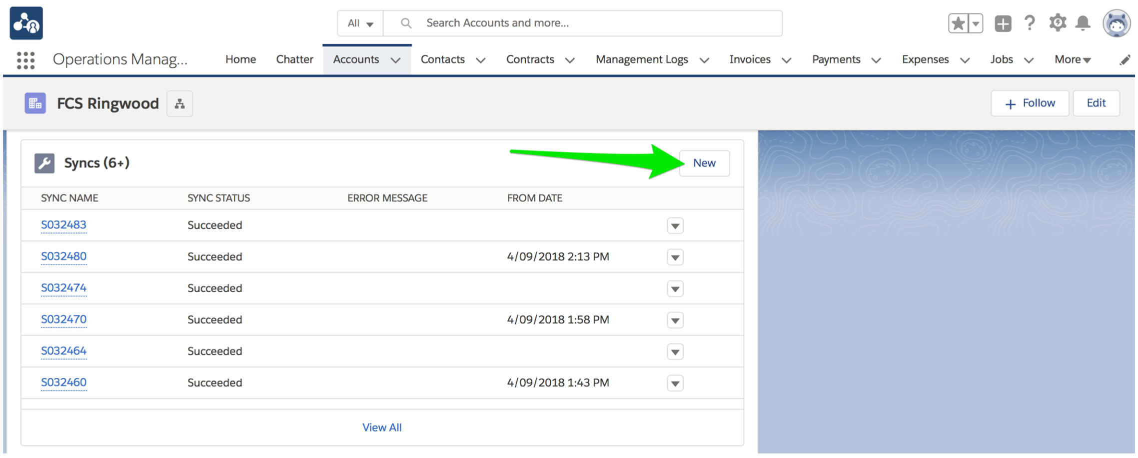
> If you need to sync historical records from a defined range prior to the specified `To Date`, create a manual sync for the desired period (*See* “How to manually sync specific records” on the facing page).

How to manually sync specific records

From time to time it may be necessary to attempt to sync specific records. You can do this by initiating a manual sync that synchronizes specific invoices or invoices from a particular date and time range. When a manual sync is specified based on a date and time range, all financial records whose create or update timestamps fall into the specified duration are synced.

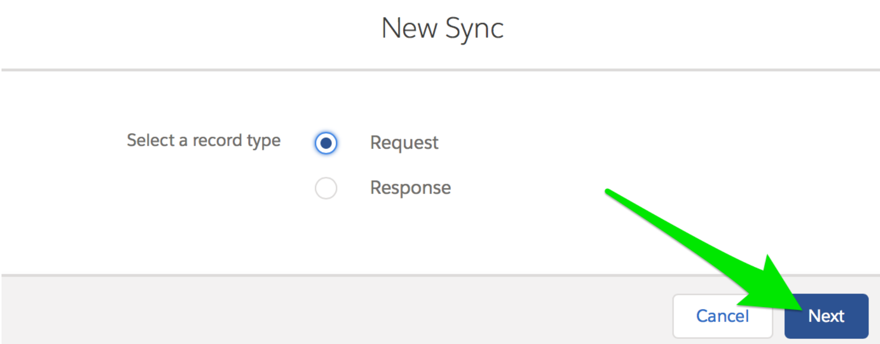
To sync specific date and time ranges for a particular account

1. From the **Syncs** section on an account's **Related** tab, press **New**.



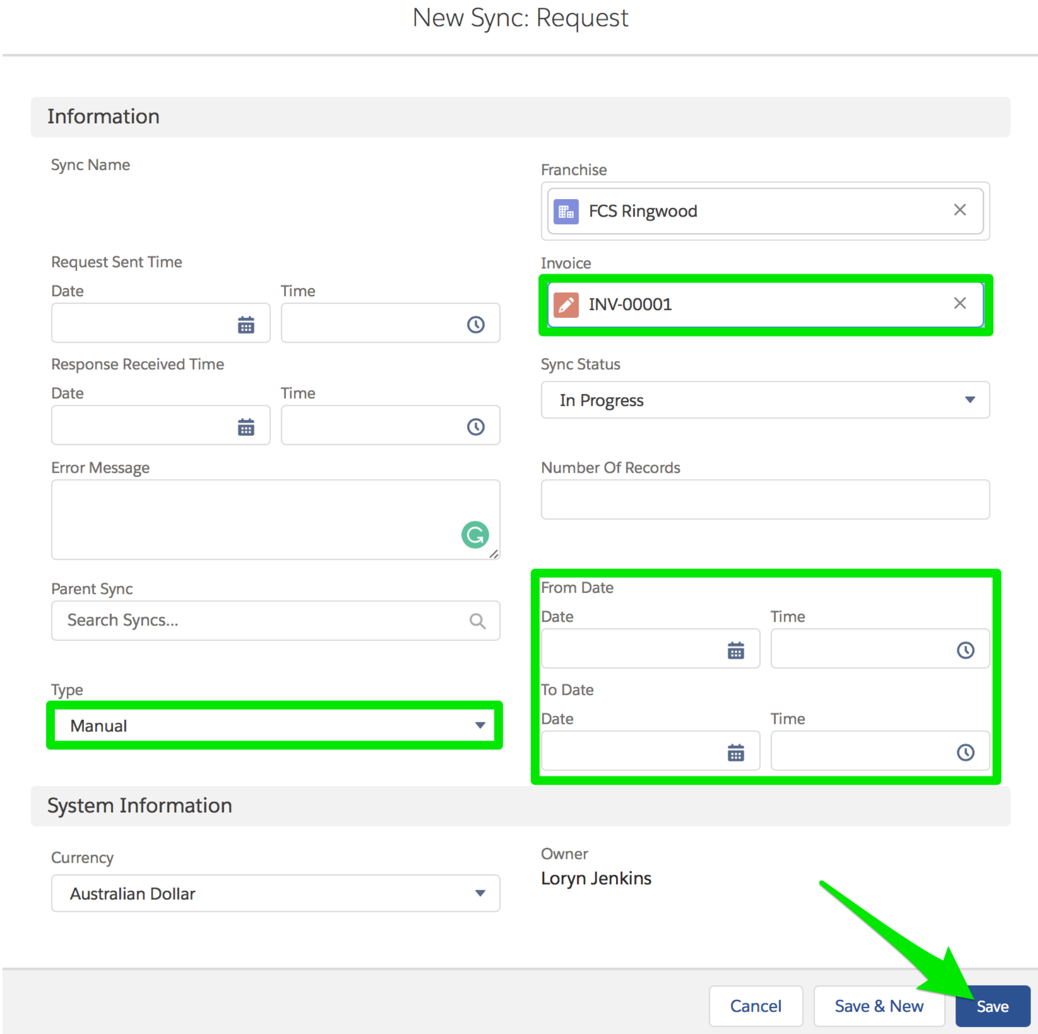
The **New Sync** dialog box appears.

2. From the **New Sync** dialog box, select `Request` then press **Next**.



The **New Sync: Request** dialog box appears.

3. From the New Sync: Request dialog box, enter:
   a. the `Type` as *`Manual`*
   b. either the **Invoice** or the **Date Range** to be manually synced.



4. When you have completed the selections, press **Save**.
5. The manual sync occurs in the background.

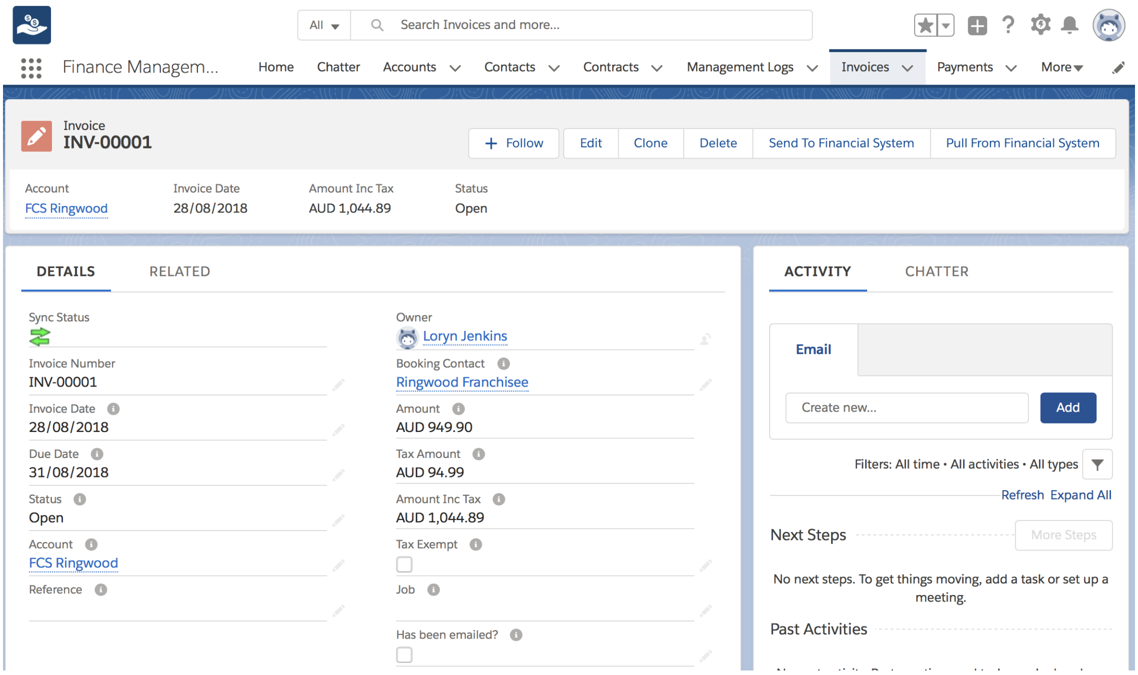
How to update an invoice after it is created

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. When this happens, it is useful to send the invoice to the financial system. This can ensure both systems have the most up-to-date detail.

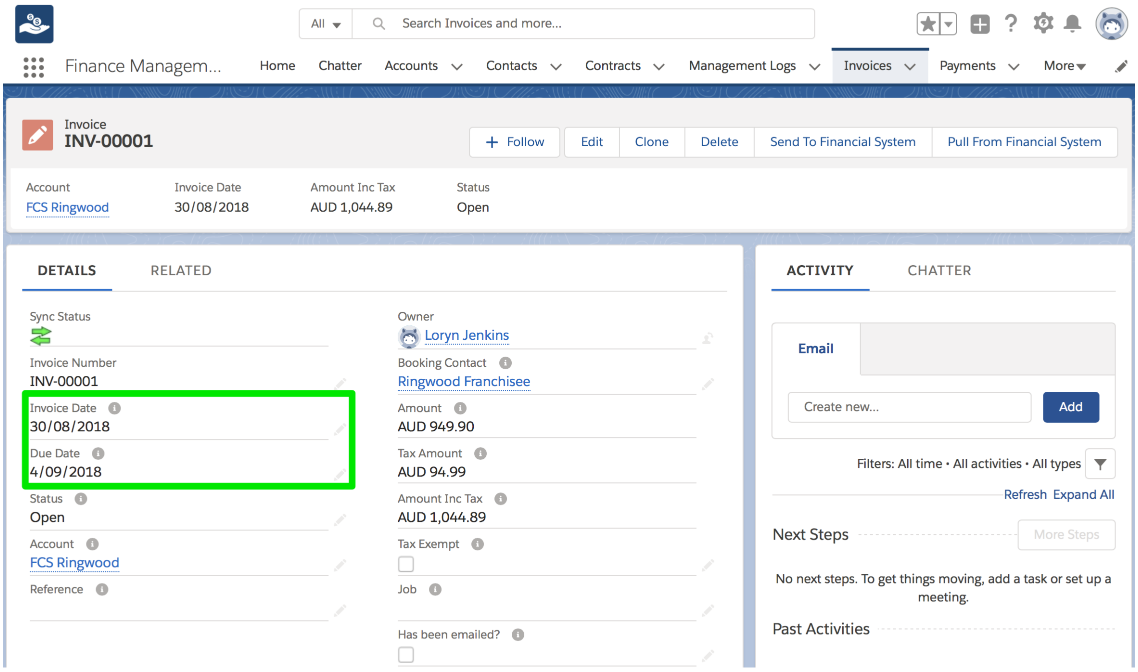
> You can update an invoice to the financial system after the first sync and before any payments are recorded.

To send changes to the financial system

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

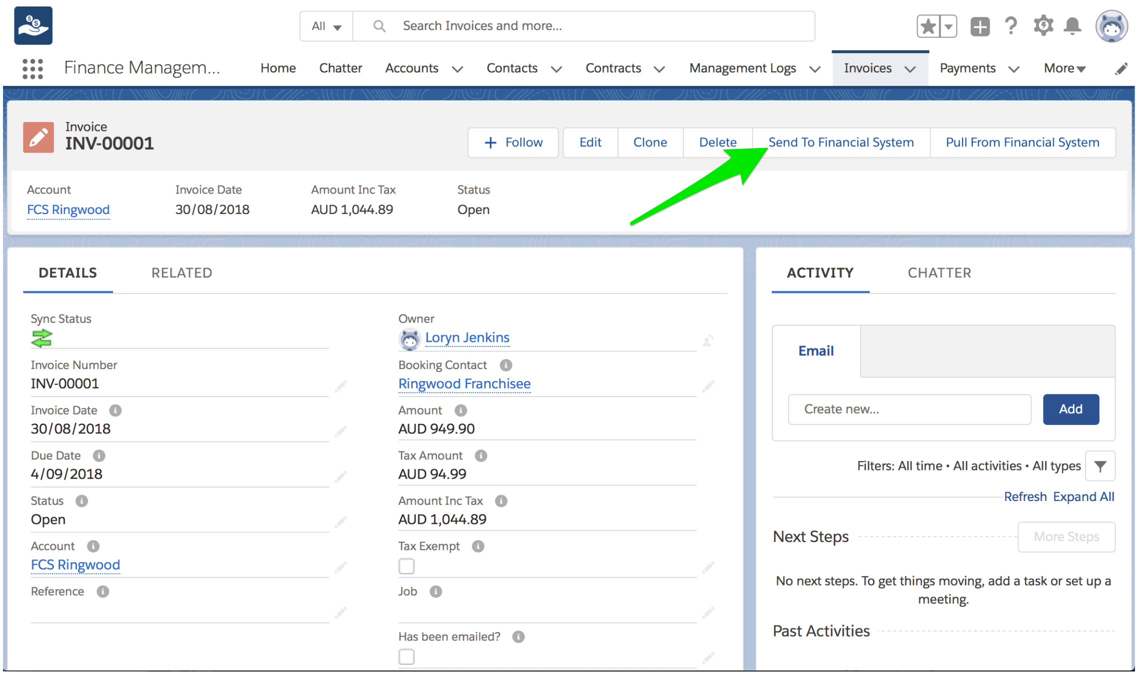


2. Now make a change to it.



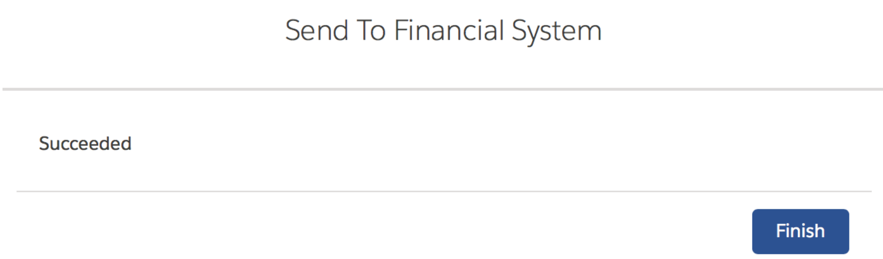
After making the change, you will want to update it in the financial system.

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

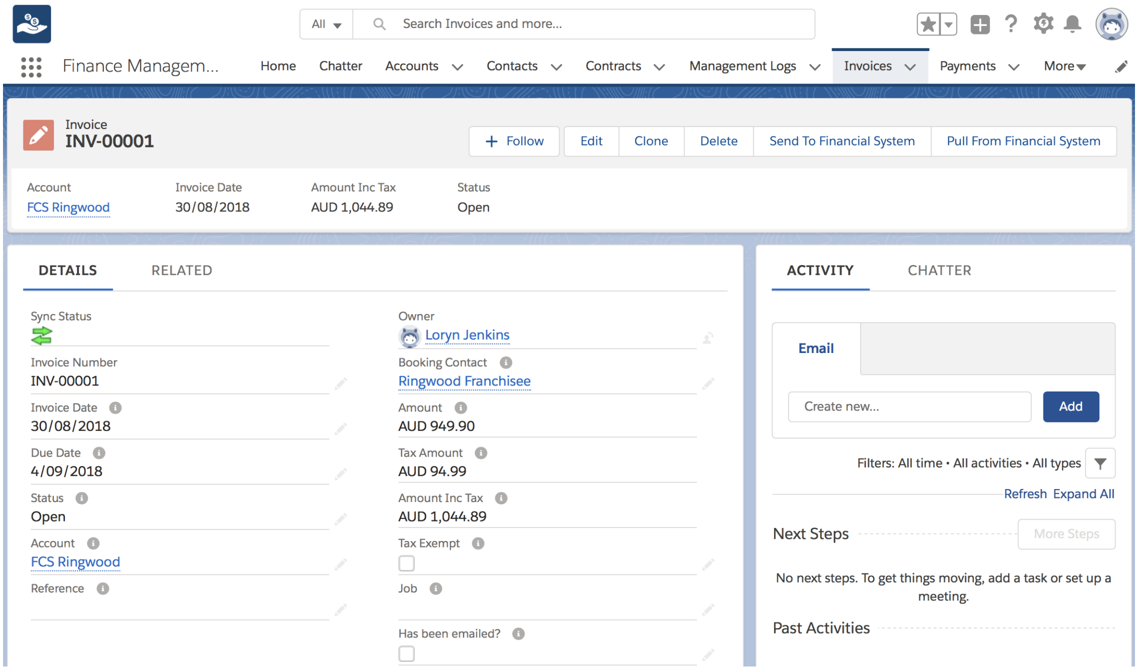


The **Send to Financial System** dialog box appears.

4. Press **Finish**.



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

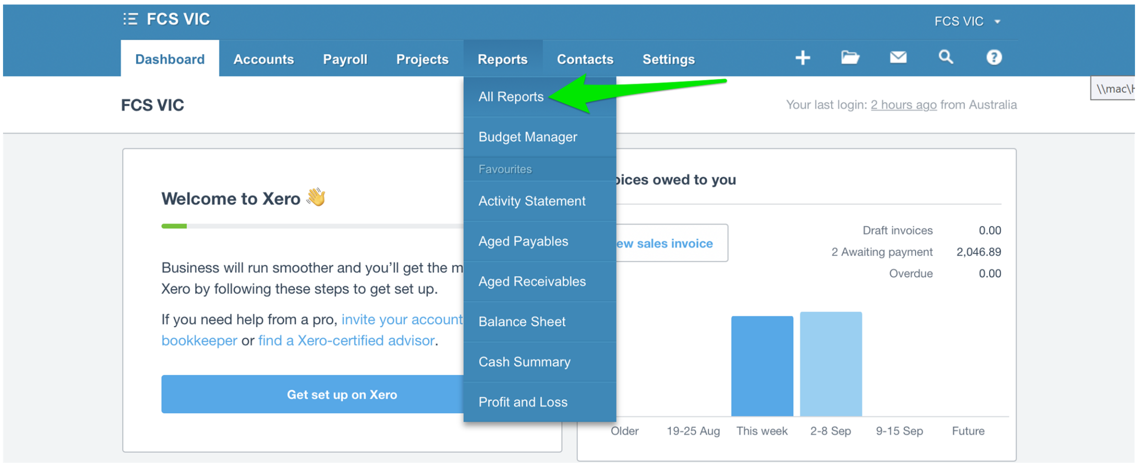


How to perform end of month reconciliation

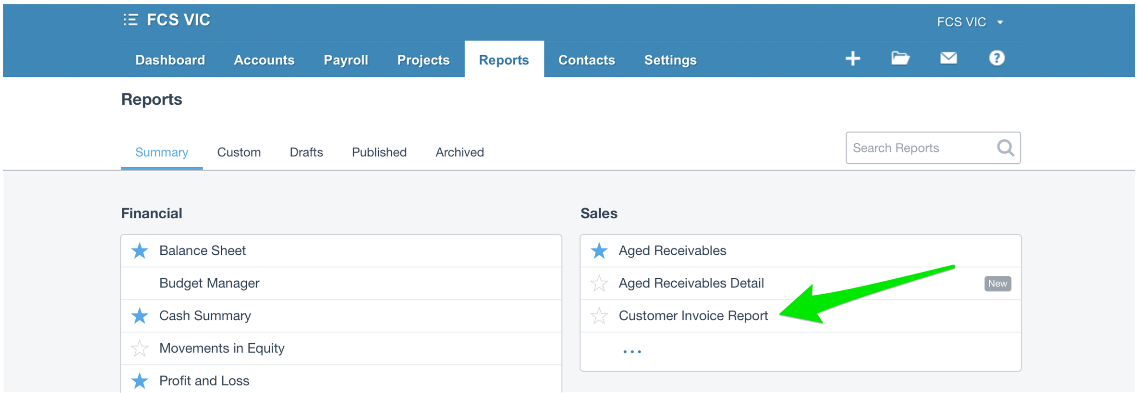
Performing an end of month reconciliation involves comparing the invoice report provided by Xero with the invoice report for Franchise Owners available within Finance Management.

To obtain the Xero end of month report

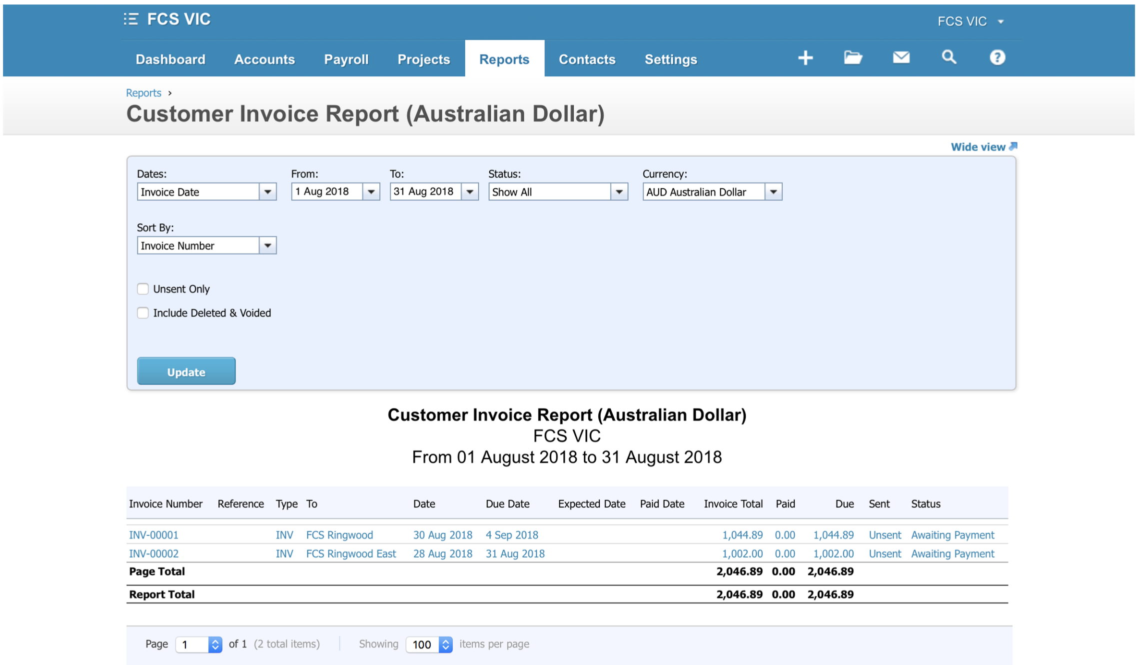
1. Log into your Xero account.
2. From the **Reports** menu, choose **All Reports**.



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

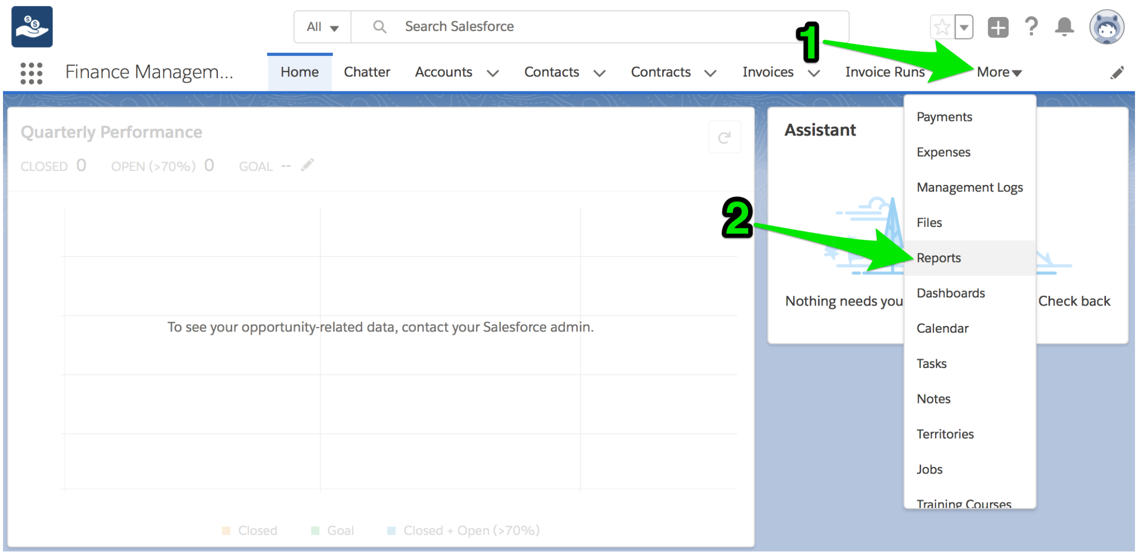


4. Modify the parameters to suit and press the **Update** button. The report appears on-screen and can be exported.

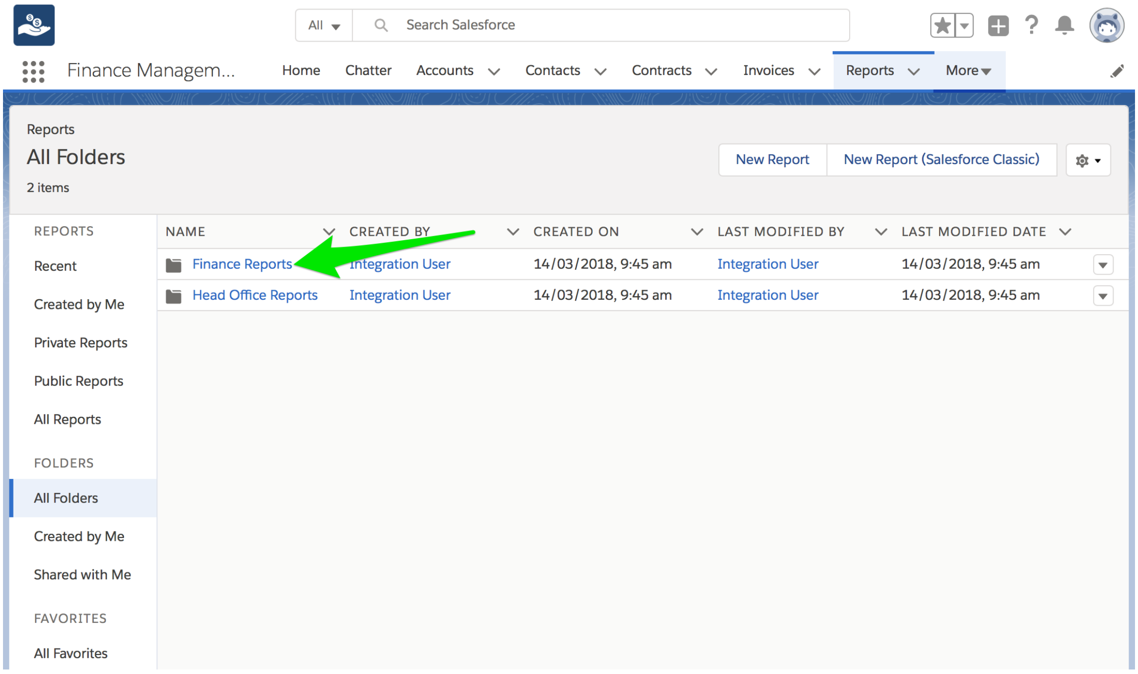


To obtain the Finance Management end of month report

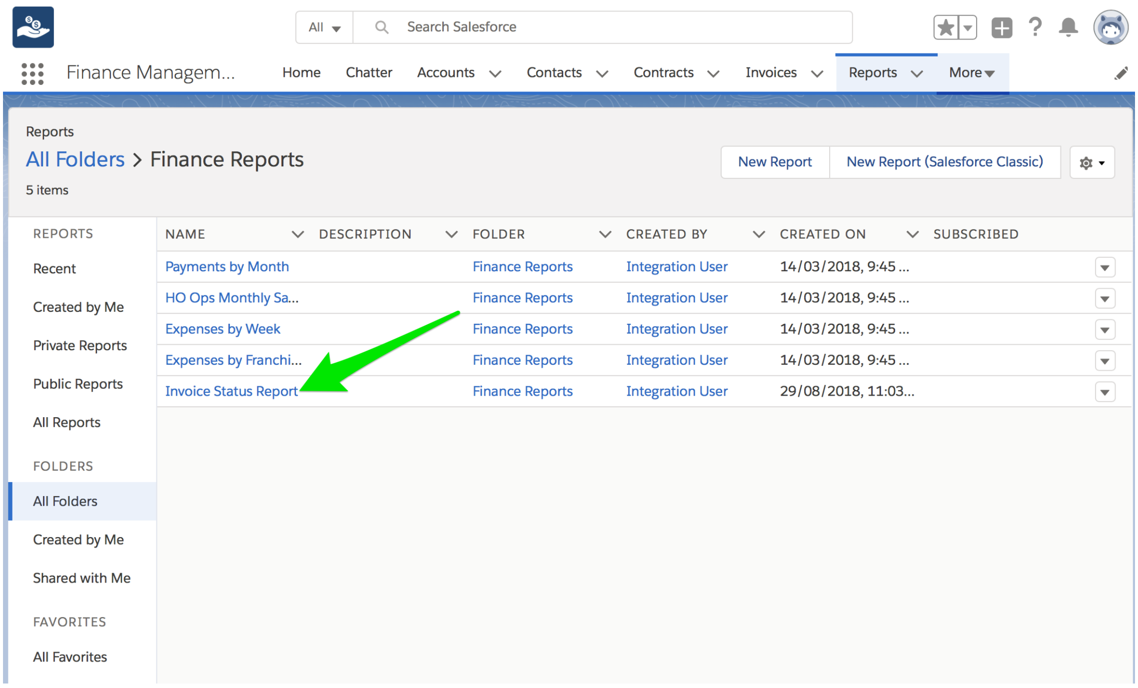
1. From the **Salesforce** menu, select **Reports**.



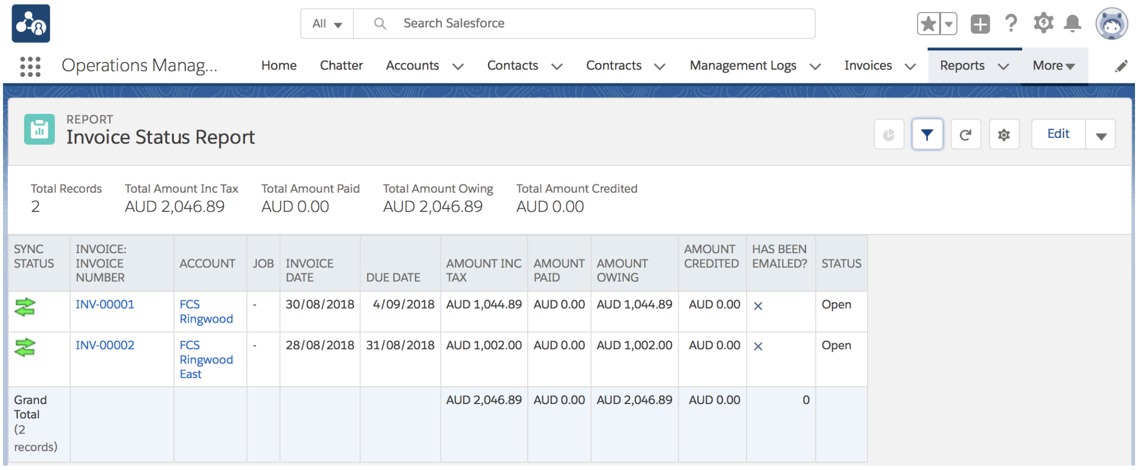
2. From the **Reports** page, go to **All Folders** and select **Finance Reports** folder.



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 8

Working with Reports

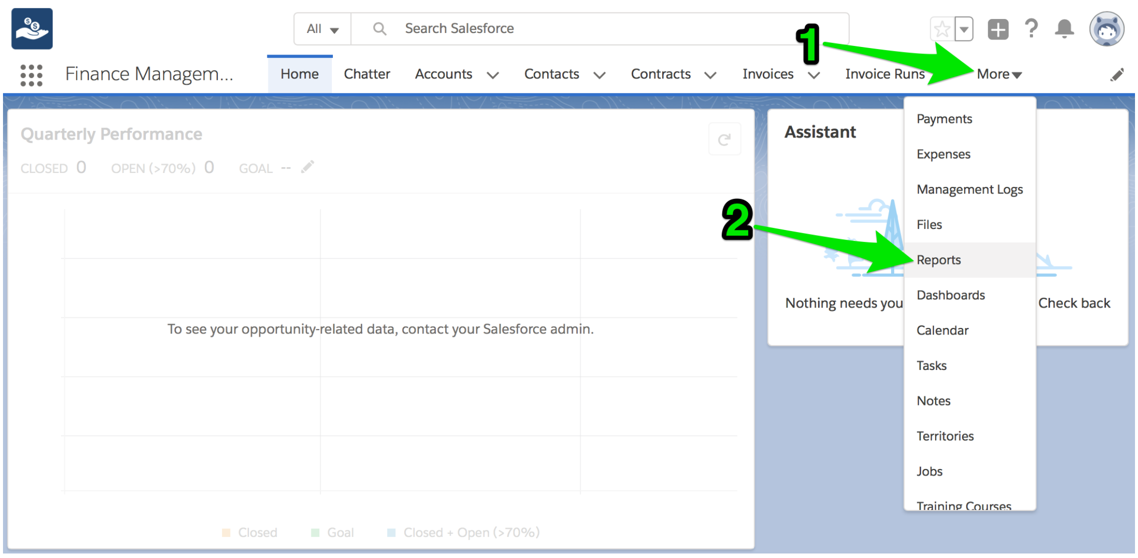
Understanding reports

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.

Finance Management ships with a range of reports tailored to operations.

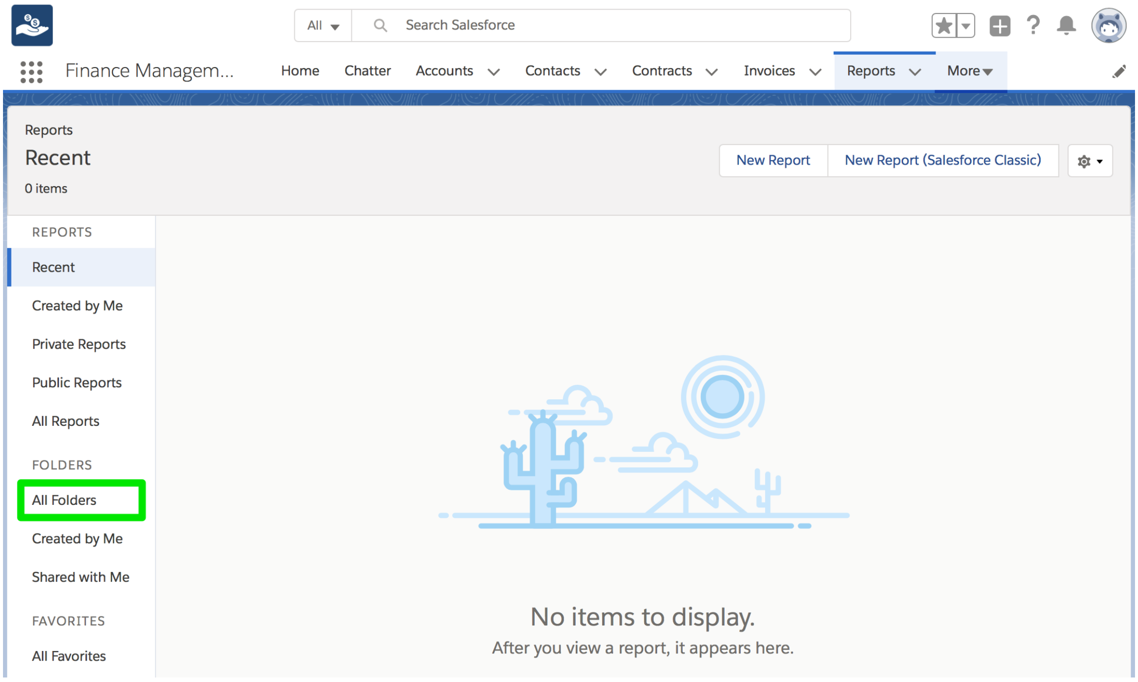
To discover available reports

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



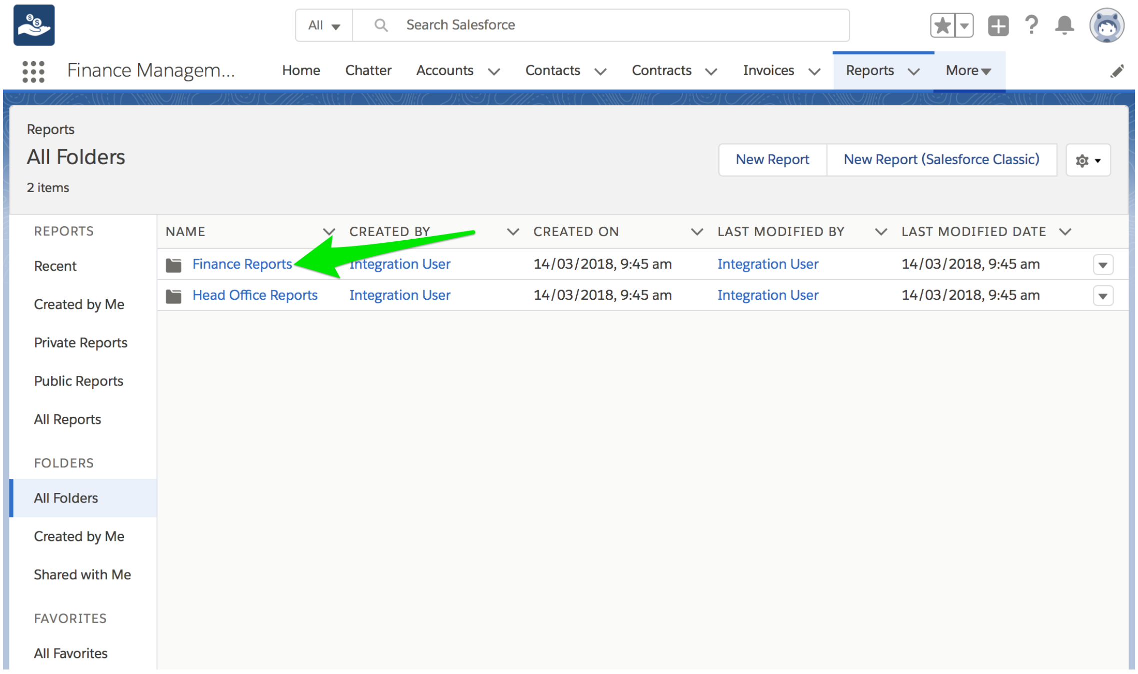
The recent reports folder appears. If you have yet to use a report, this will be blank.

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

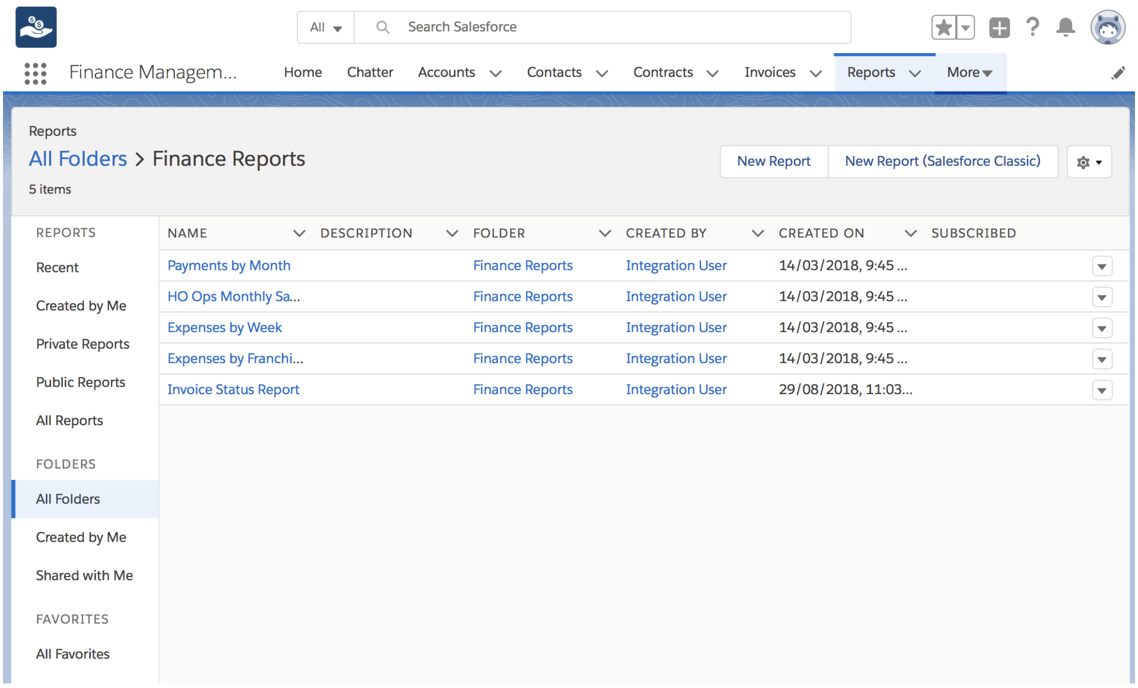


There you will see each of the different categories of report that come with Finance Management.

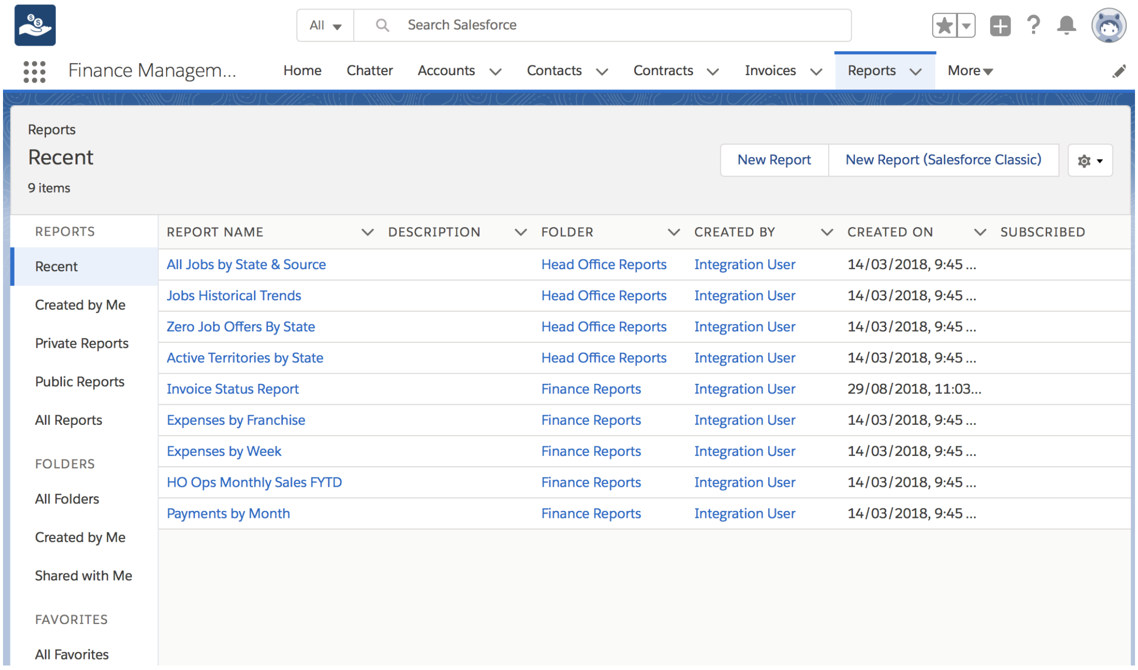
3. Select any one of the report folders.



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 Finance Management are summarized below.

Finance reports

Report Name	Description
Expenses by Franchise	Expense details grouped by period then by type.
Expenses by Week	Expense details grouped by period then by type.
HO Ops Monthly Sales FYTD	Head Office Invoices (for issue to franchisees) grouped by month.
Invoice Status Report	Enable periodic reconciliation with Xero.
Payments by Month	Franchisee payments to Head Office grouped by month.

Head Office Reports

Report Name	Description
Active Territories by State	Owned Territories by State.
All Jobs by State & Source	Listing of jobs, statuses, locations and owners by state and source.
All Jobs Last Week ESB	Listing of jobs, sources, statuses, locations and owners along the Eastern Sea Board of Australia.
Ceasing Franchisees	Franchisees whose contracts are in the process of being deactivated.
Job Offer Leaderboard by State Last Week	Listing of Job Offers by Franchisee and State in the last seven days.
Job Offers Last Week ESB	Listing of Job Offers by State in the last seven days along the Eastern Sea Board of Australia.
Jobs Historical Trends	Job details grouped by Period and State.
Self Generated Work Last Week	Jobs that did not come from the website or call center in the last seven days.

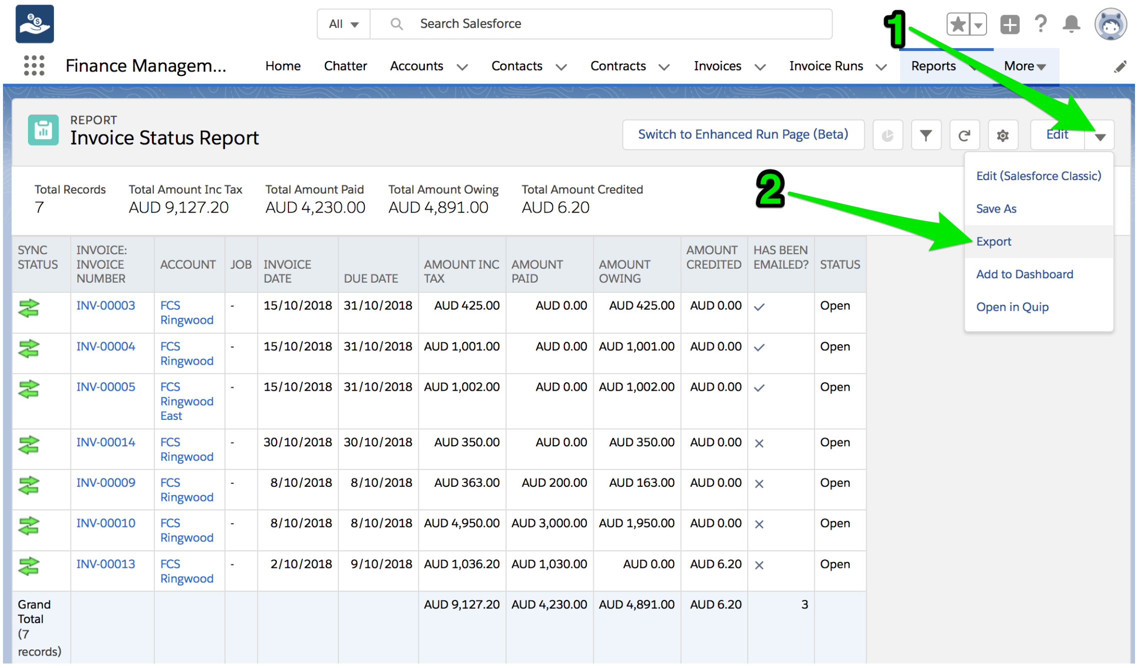
Report Name	Description
Territory Only by Billing State	Territories listed by billing state.
Zero Job Offers by State	Listing of franchises receiving no Job Offers within the last seven days.

How to export a report

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

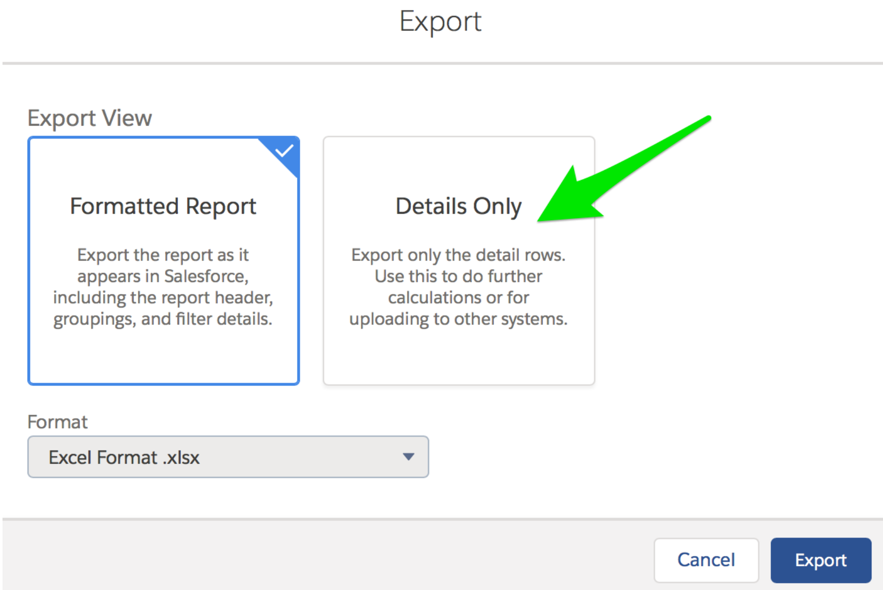
To export report results

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



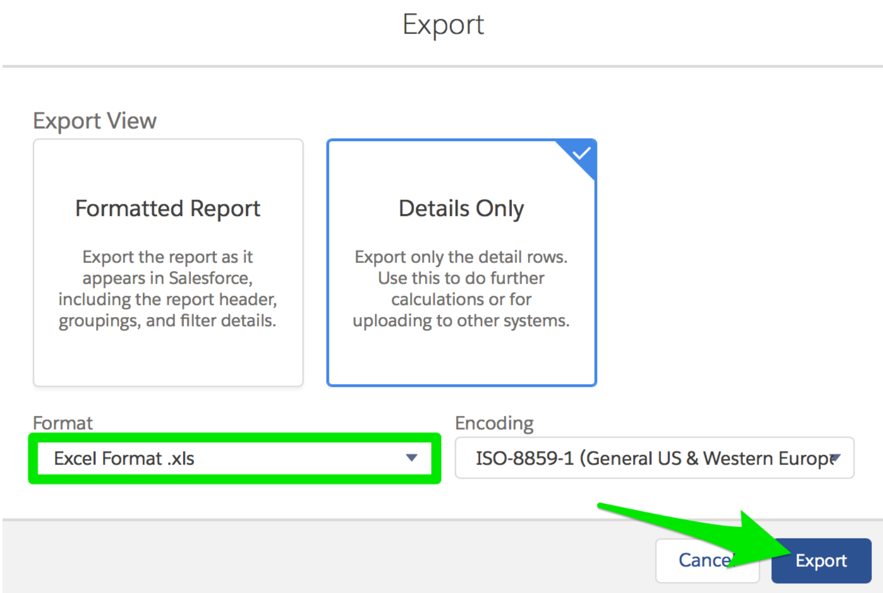
The Export dialog box appears.

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 138.
2. Print it using Excel.

CHAPTER 9

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. This guide contained a brief summary of the most commonly used features needed for V.I.P.'s Commercial divisions. For more information about V.I.P. Business Management, see the V.I.P. Business Management Suite User Guide.

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.

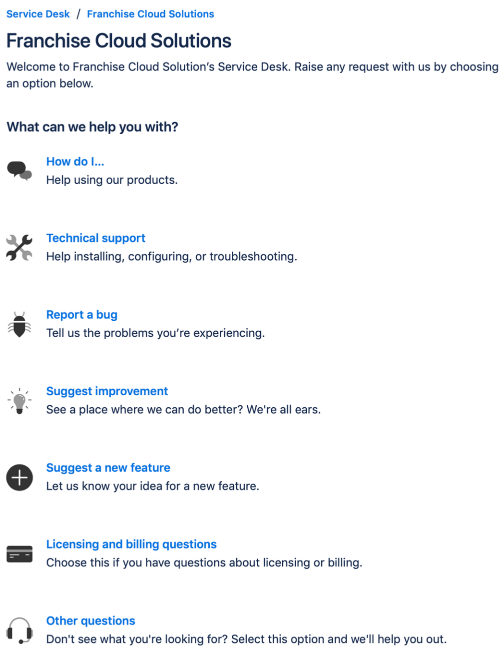
Contacting Customer Support

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

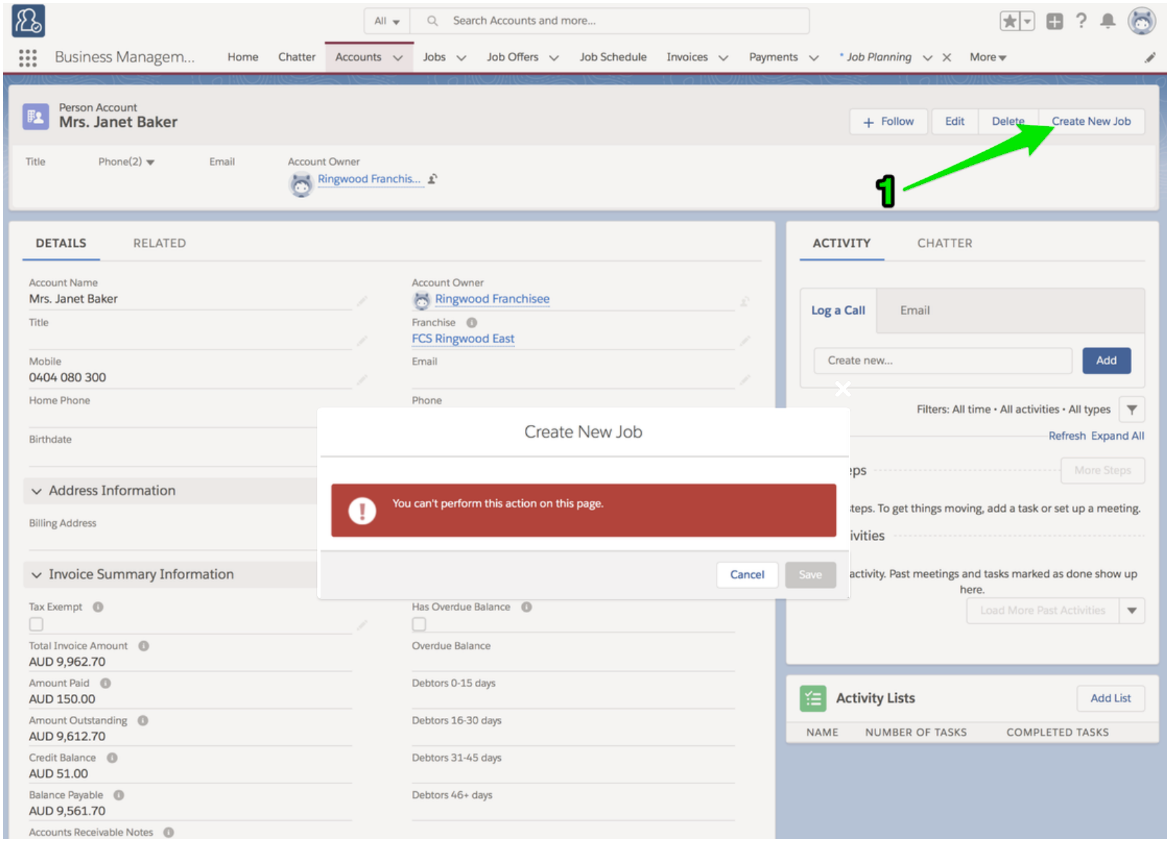
Cannot create new job from a customer's Account page.

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.

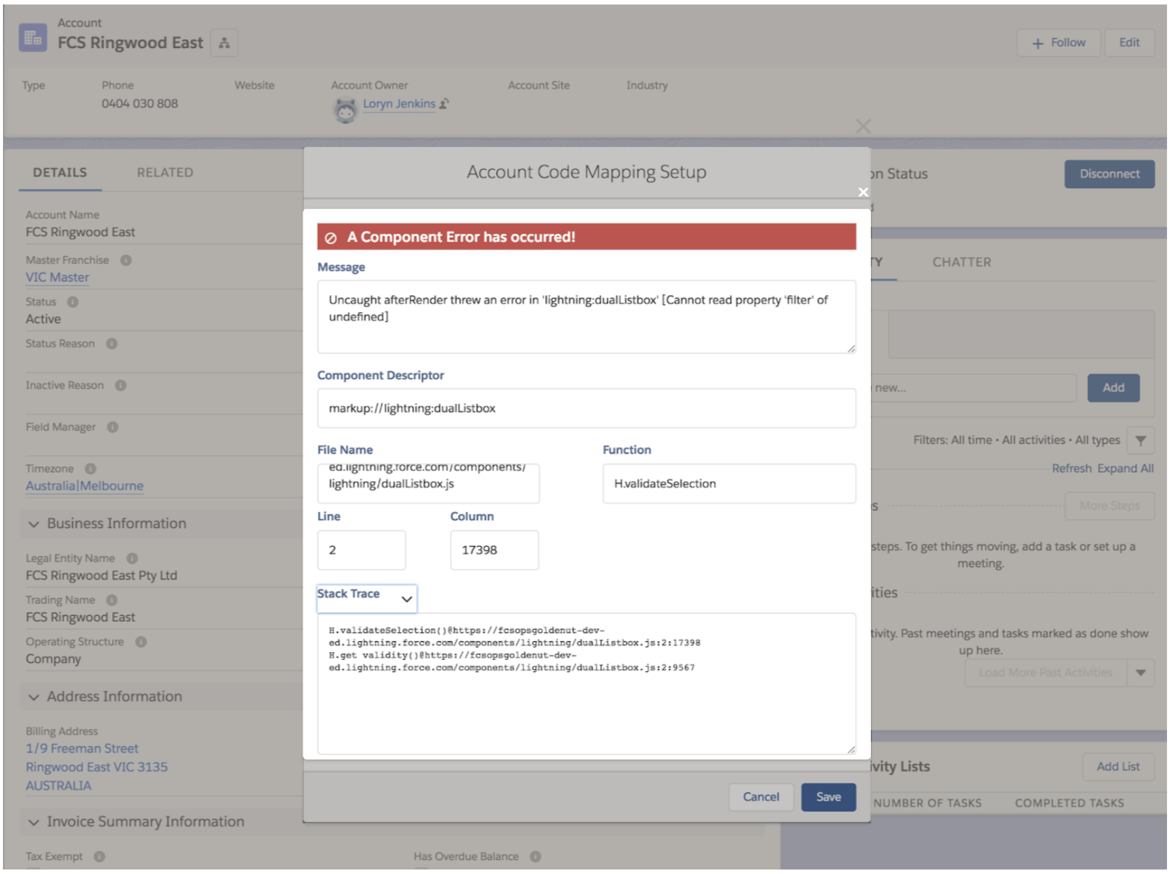
To replicate

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

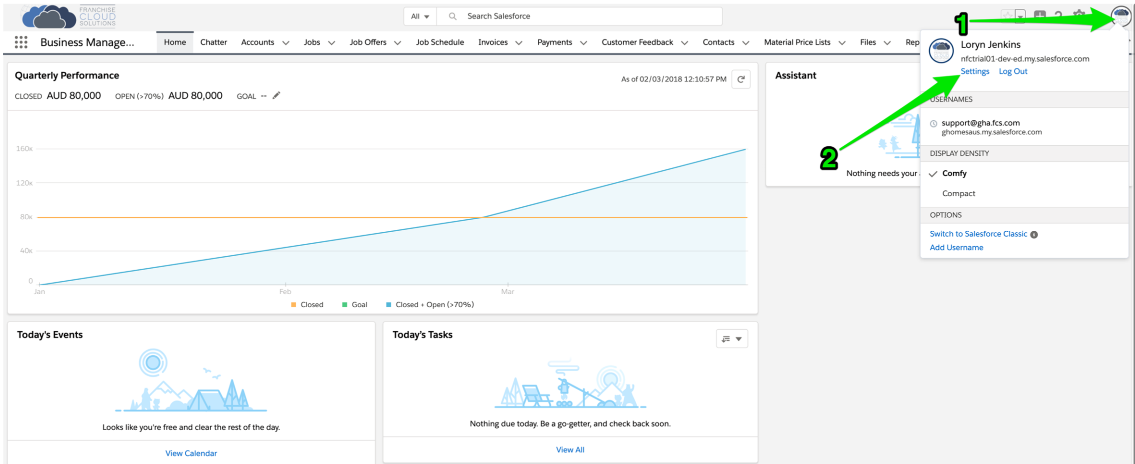
- Who affected: All franchisees, Users of Job Calendar.
- Visibility: 40 times per month per franchisee.
- Block: None.

Granting Account Login Access

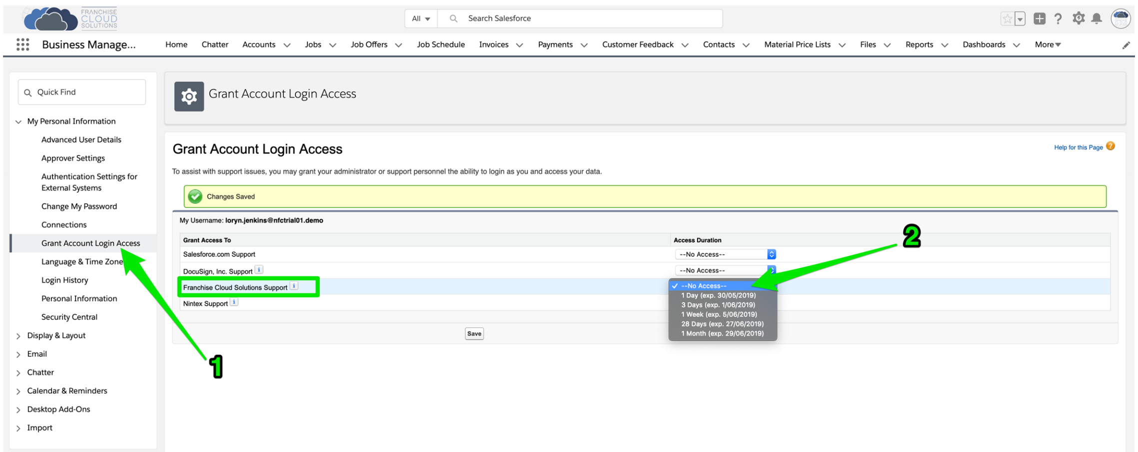
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

To provide our customer support team access to your system

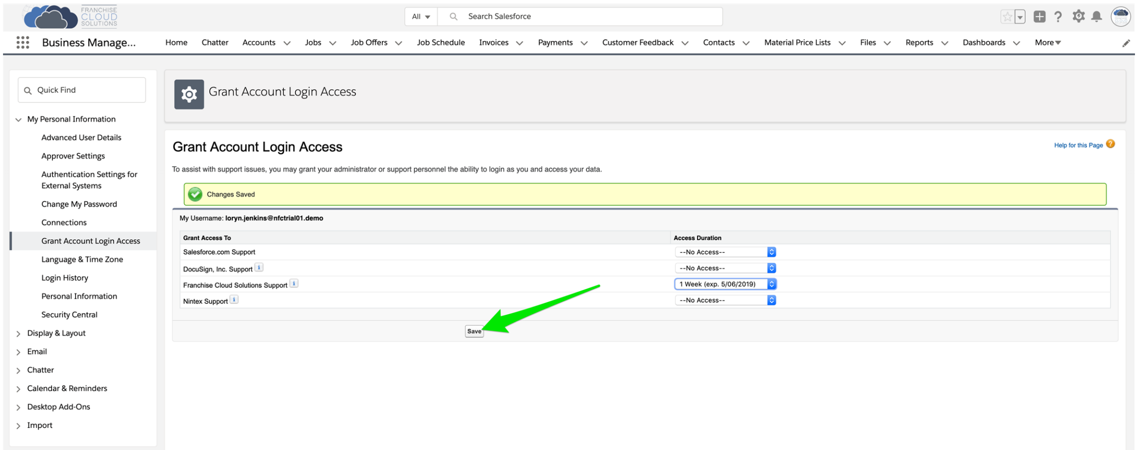
1. Select your account **Settings**.



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.