Franchise Recruitment
Administration Guide

version 1.11

Franchise Recruiter version 1.26

Franchise Cloud Solutions

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

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CHAPTER 1

Getting Started

Introduction

Franchise Recruitment is designed especially for the franchise industry. It provides an efficient platform for franchise sales teams to qualify and develop franchise prospects, and then manage contract generation and hand-over processes to operations.

Franchise Recruitment will help any franchise sales team:

- increase administrative efficiency
- reduce errors and omissions
- comply with jurisdictional codes of conduct
- implement a best practice sales process

Together with other Franchise Cloud Solutions products, your franchise business will have all the IT capabilities it needs to grow and win in the marketplace.

Where to start

This guide describes how to perform Administration tasks specific to Franchise Recruitment.

We recommend you consult Salesforce documentation for help configuring the Salesforce Platform.

CHAPTER 2

Administration tasks

How to create a user

You will need to create a user account for each person who uses Franchise Recruitment.

> Refer to Salesforce documentation on User Management to learn how to create a new user in Salesforce.

To add a user

1. Create a new user following Salesforce instructions.
2. Apply settings to the **User** object according to the appropriate column in the table below.

Field	User
User License	*Salesforce*
Role	Appropriate for the Master Franchise
Profile	Select from one of the following » REC Administrator » REC Sales Manager » REC Marketing Manager
Managed Packages	For all users » *Base* » *Recruitment* Then select optional components » *Docusign for Salesforce*
Permission Set Assignment	One of the following » *REC Administrator Access* » *REC Sales Manager Access* » *REC Marketing Manager Access* » *Drawloop User*

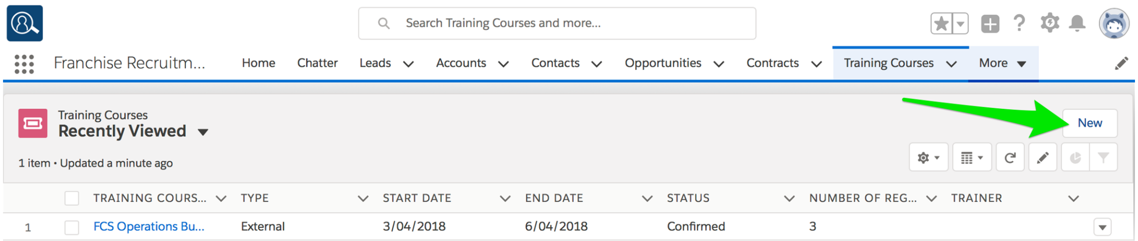
How to create a training course

Each training course record represents the running of a specific training event on a given range of days. An administrator is required to create each training course.

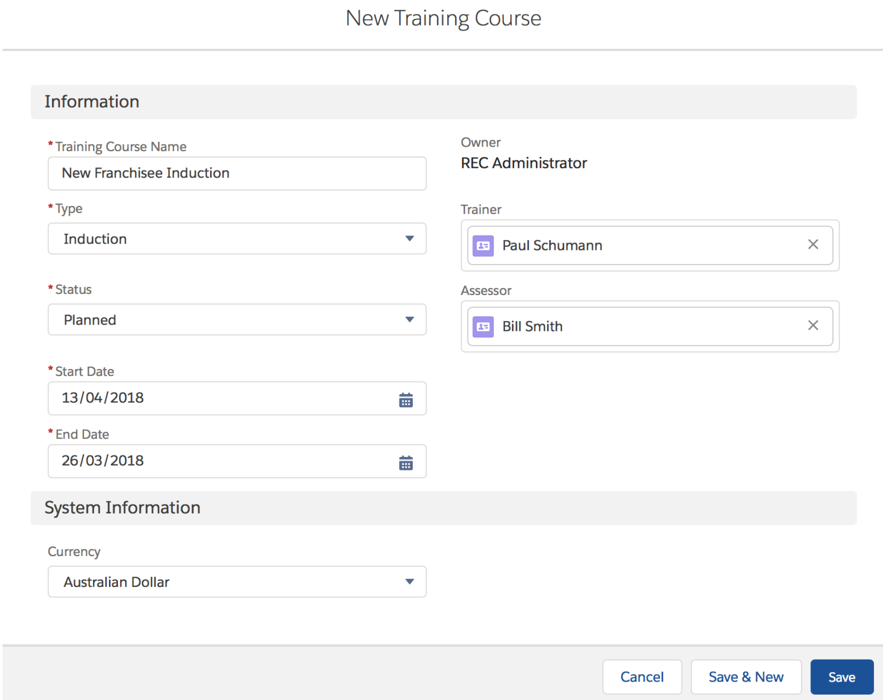
Once a course is created, sales representatives can register attendees.

To create a training event:

1. From the Salesforce menu, choose **Training Courses**.
2. To create the new course, press **New**.



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



Field Notes

» Use `Training Course Name` as the primary user identifier.

- Use `Status` to communicate the certainty of the training course occurring.
  - *`Planned`* until the course details are confirmed.
  - *`Confirmed`* when you know the course will go ahead.
  - *`Closed`* when the event is completed.
- Set `Type` so that it appears on the appropriate reports and list views.
- `Trainer` and `Assessor` represent the people who are responsible for the running of this course.
- `Start Date` and `End Date` represent the first and last dates of the running of this instance of the course.

> It is best practice to relate all contacts to a business account. If you need to add contacts for external Trainers or Assessors, add them as contacts to the business they work for, then add them as a contact in this dialog box.

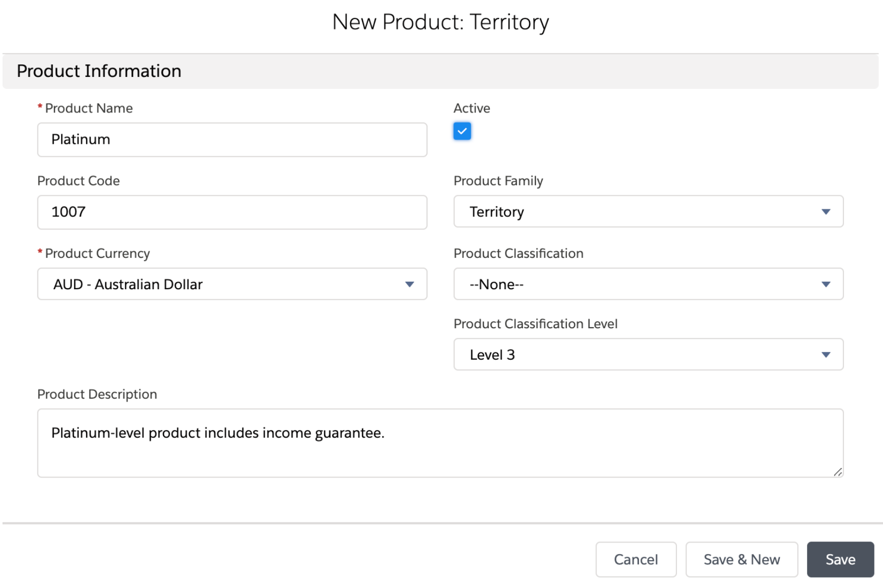
How to create a product

Products are used to classify a territory and set the default sale price.

> During implementation your Franchise Cloud Solutions consultant will configure your price book according to your needs. Your administrator will need to maintain the price book to set default prices and apply different prices per region as required. Refer to Salesforce documentation, Manage Price Books.

To add a new product:

1. Open a **Territory** record.
2. In the `Product` field, choose *`New Product`*.
3. In the **New Product: Territory** dialog box, complete the details.



The new product is now available for use within territories.

> When you add a new product, one or more Price Books may need to be updated.

How to create a master territory

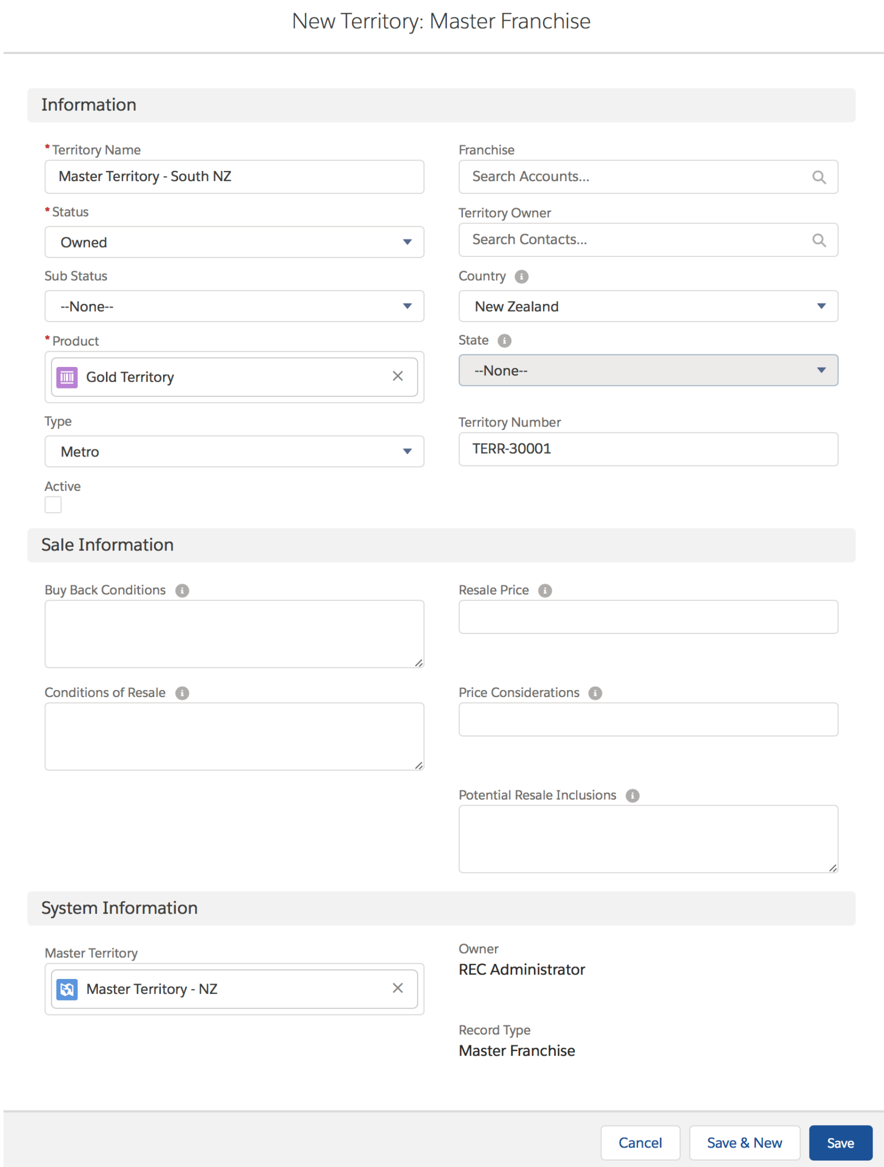
Master territories function as a parent to which franchises are attached as children.

To create a new master territory

1. From the **Territories** list, press **New**.

   The **New Territory** dialog box appears.

2. Select the **Master Franchise** record type, and press **Next**.
3. Complete the details and press **Save**.



Field Notes

- Enter the `Territory Name` as the primary user identifier for this record.
- Set `Status` to *`Owned`* or *`Unowned`* as appropriate.
- The `Product` field is required but irrelevant to a Master Territory. Set it to an arbitrary product.
- Set the `Country` (and `State`, if appropriate).
- Enter a `Territory Number` as a territory reference.
- If this territory is the child of another territory, select the parent territory in the `Master Territory` field.

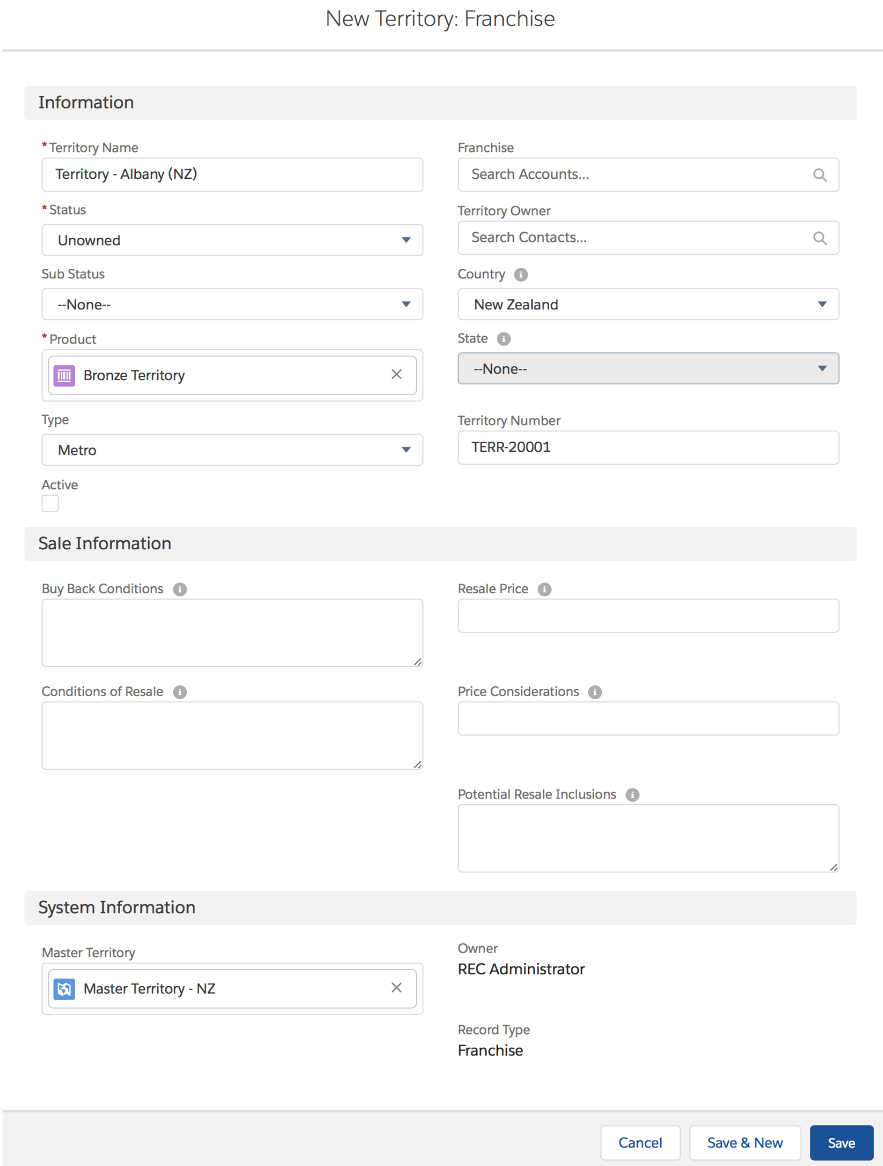
How to create a franchise territory

A franchise territory is bought and sold within Franchise Recruitment. A franchise territory is the child of a master territory and has its locations defined by a combination of suburb names and postcodes.

To create a franchise territory ready for sale

1. From the **Territories** list, press **New**.

   The **New Territory** dialog box appears.
2. Select the **Franchise** record type, and press **Next**.
3. Complete the details and press **Save**.



Field Notes

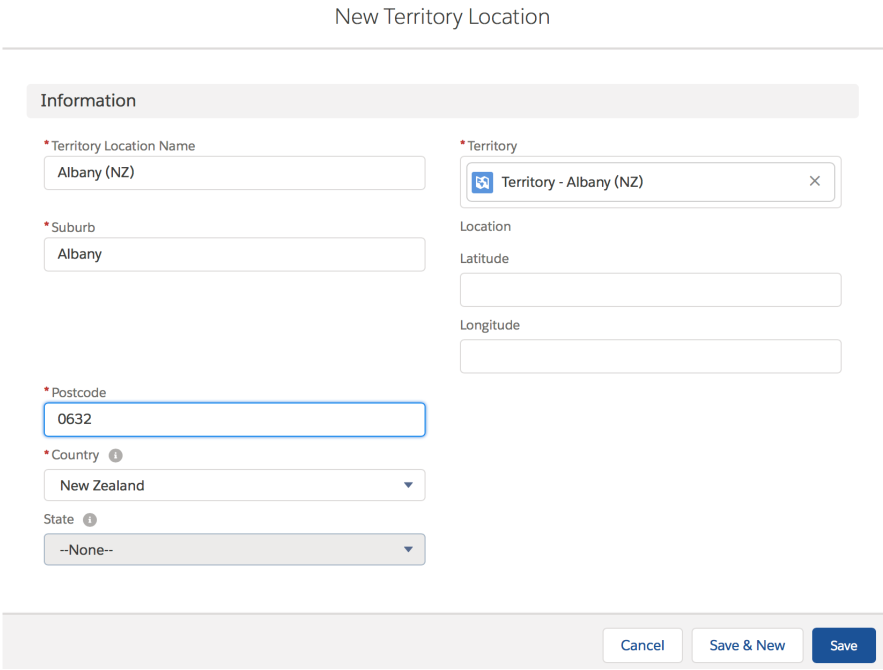
- Enter the `Territory Name` as the primary user identifier for this record.
- Set `Status` to *`Unowned`* as when first configuring the territory for sale.
- Generally leave Substatus as *`--None--`* when first configuring the territory for sale.
- Select the appropriate `Product` based on the territory's classification.
- Select the appropriate `Type` for this territory. Type is used to assist sales representatives in searching for and identifying appropriate territories for customers.
- Leave the `Franchise` and `Territory Owner` fields empty when configuring the territory for sale.
- Set the `Country` (and `State`, if appropriate).
- Enter a `Territory Number` as a territory reference.
- Use the fields within **Sale Information** as described in the on-screen field help.
- Select the `Master Territory` to which this territory belongs.
- Check the `Active` field. Active indicates that the territory record is complete and ready for use. (Inactive indicates the territory is still being set up or has been superseded.)

To set the franchise location

1. From the **Territory**, select the **Related** tab.
2. From **Territory Locations**, press **New**.

   The **New Territory Location** dialog box appears.

3. Complete the details as appropriate.



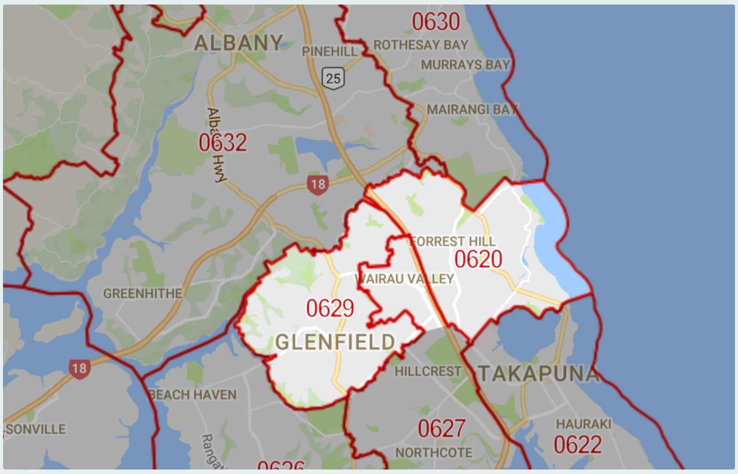
Field Notes

- Enter a `Territory Location Name` that will identify this territory.
- Enter a `Suburb` name that describes this location.
- Enter a `Postcode` that describes this location.
- Select the `Country` (and `State`, if appropriate).
- Optionally enter `Latitude` or `Longitude` identifiers.

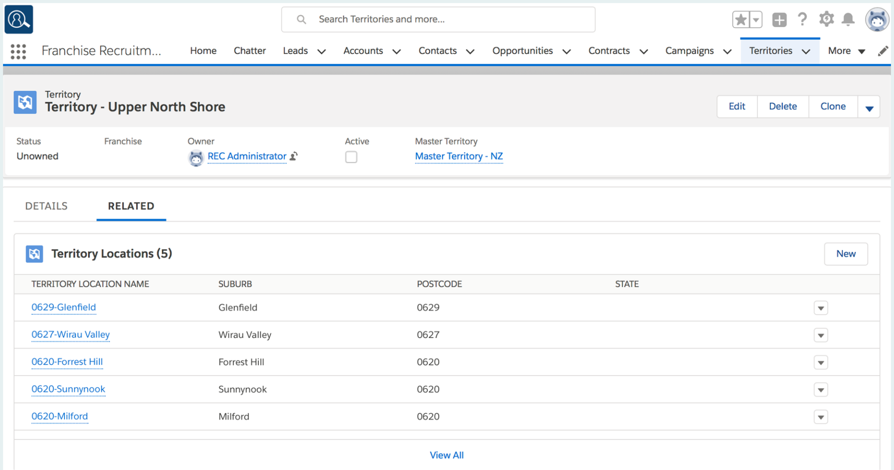
How to split or merge franchise territories

Sometimes the business within a territory grows, making the territory unwieldy or too expensive. One solution is to split the territory by moving one or more territory location records to another territory.

Here is an example territory based on Auckland's North Shore.



Here is how the territory is defined in Franchise Recruitment



Now let's say we want to split this territory into two new territories. Here's how we do it.

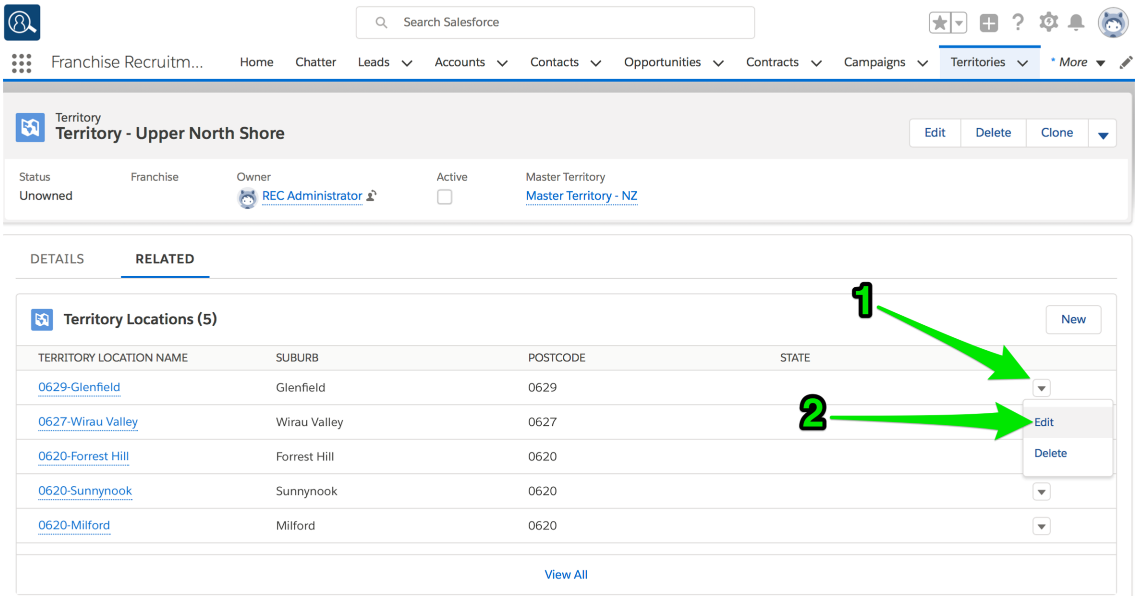
To split a territory

1. Create the new territory or territories. *See* "How to create a franchise territory" on page 12.
2. Move each **Territory Location** record from the current territory to its new territory. *See* "To move a Territory Location record" on the next page.

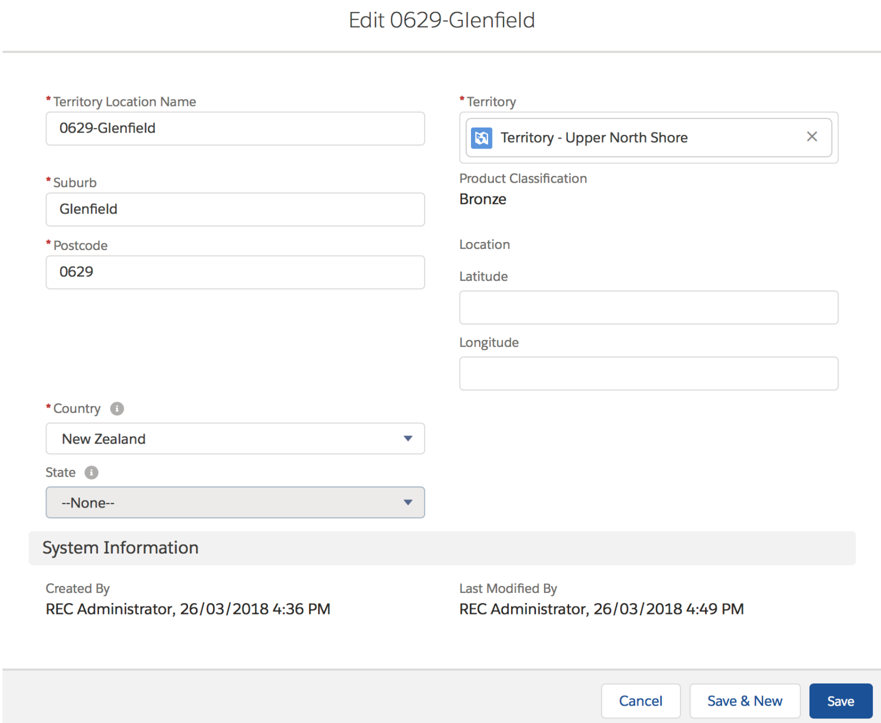
3. Add a **New Territory Relationship**. *See* “To add a split Territory Relationship record” on the facing page.

To move a Territory Location record

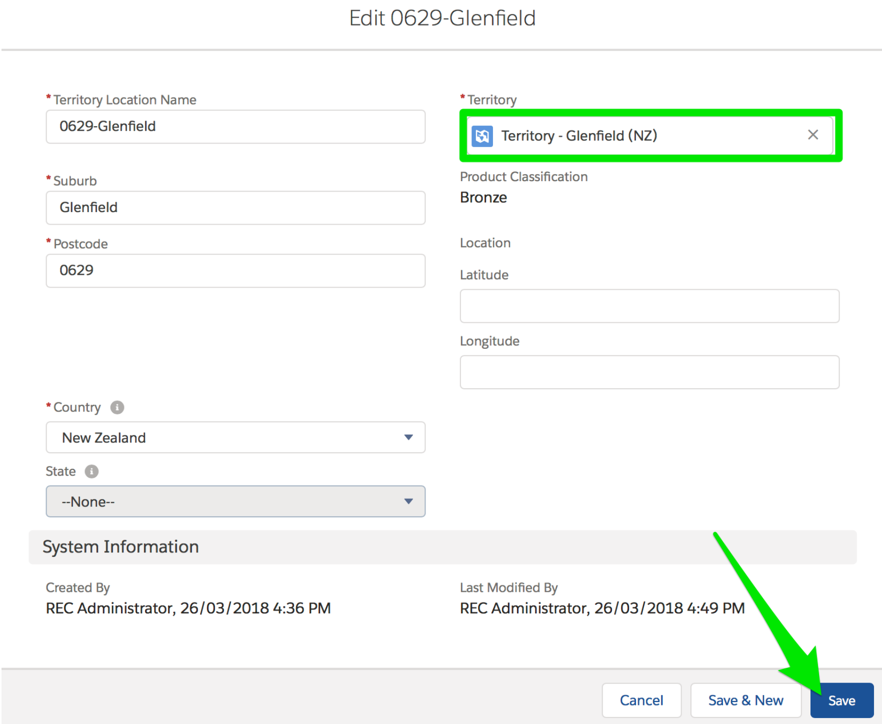
1. From **Territory Locations**, select **Edit**.



The **Edit** dialog box appears.



2. From the **Edit** dialog box, replace the `Territory` value, then press **Save**.

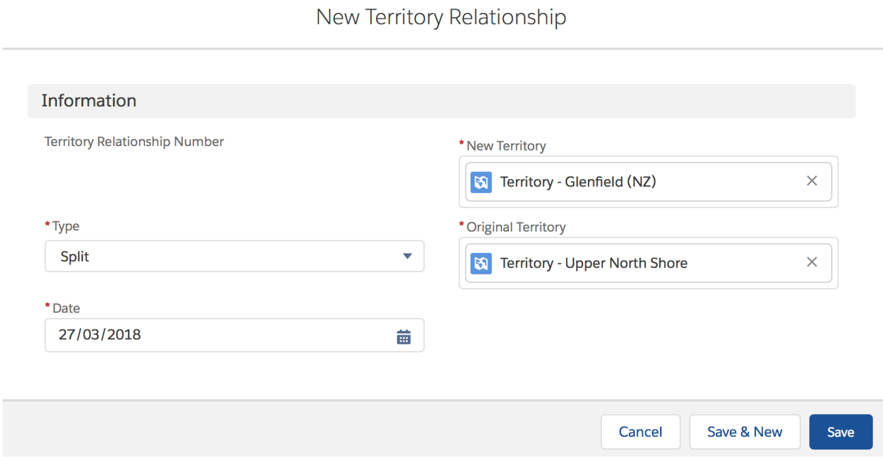


> When you go to the new territory, you may not immediately see the moved Territory Location records. If this happens, select the **Territory Location**'s **View All** link. You will see all the **Territory Locations** attached to the territory, and they will now all display on the **Territory**'s **Related** tab.

To add a split Territory Relationship record

1. From the current **Territory**, on the **Related** tab, go to the **Replaced By** section and press **New**.
2. Set the **Type** to *`Split`*.
3. Set `Date` to when the split becomes effective.

4. Under `New Territory`, select the territory to which the **Territory Location** record was moved.



5. Now press **Save**.

> The territory relationship record now appears on the current territory's **Replaced By** section. The same territory relationship record appears in the new territory's **Historical Territories** section.

To merge territories

1. Note the territory that is the merge target. Create it if necessary.
2. Go to the territory containing the Territory Location record.
3. Move the Territory Location record. *See* "To move a Territory Location record" on page 16.
4. Record the merge using the **Replaced By** relationship section.

> The detailed merge procedure is performed similarly to the detailed split procedure.

5. Now uncheck the old territory's `Active` field.

How to import leads from an external source

Many times you have existing databases, lists purchased from outside vendors, or data created using external tools that need to be imported into Salesforce. Salesforce allows you to import them.

Refer to Salesforce documentation for:

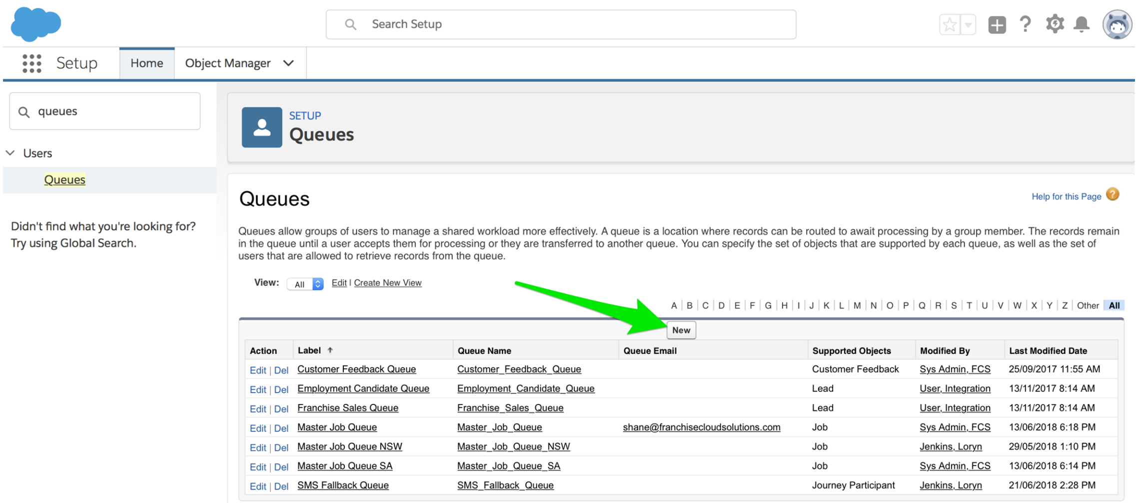
- Import Lead Data into Salesforce
- Prepare Lead Data for import into Salesforce

How to create a Salesforce queue

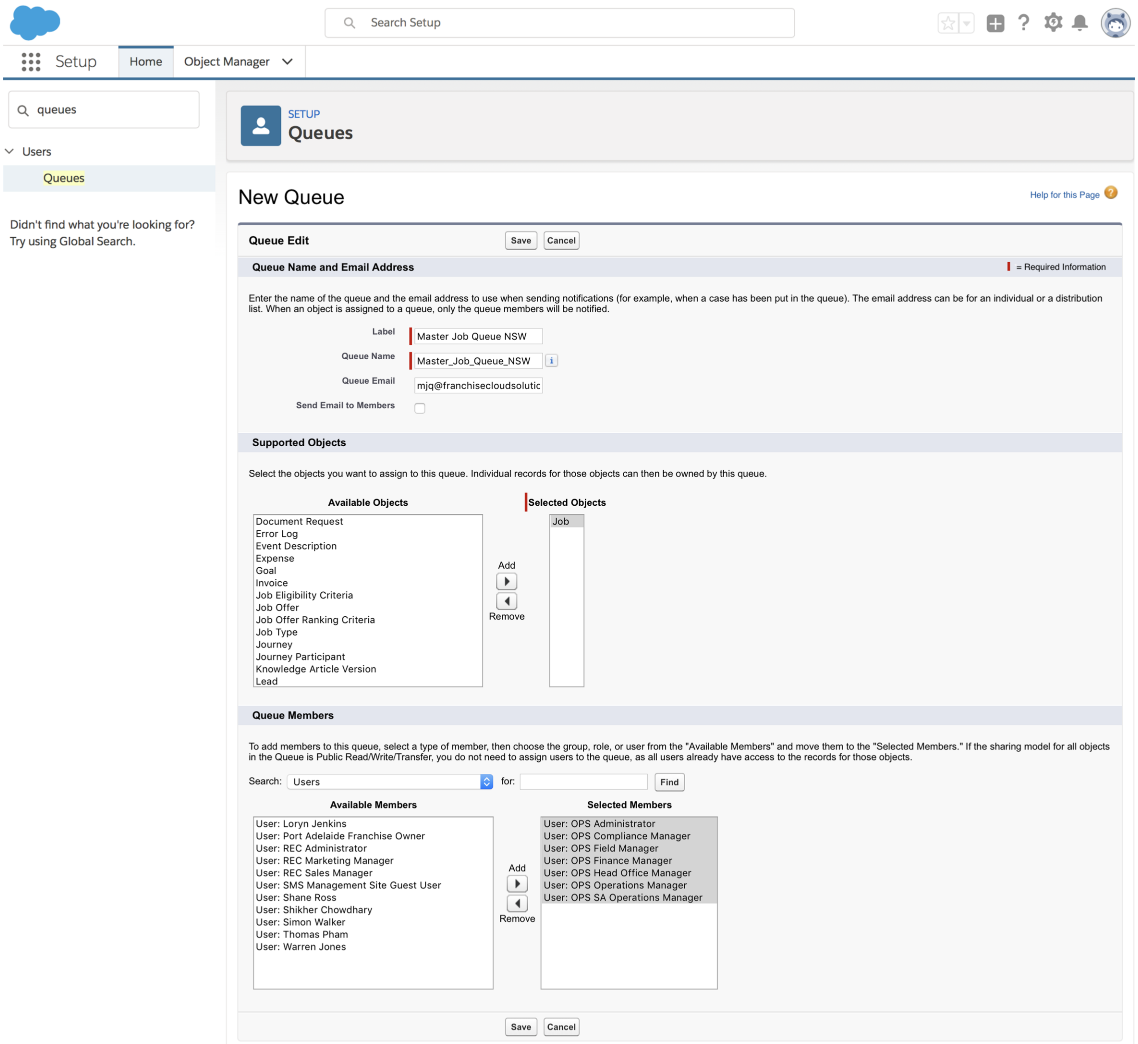
In Salesforce, records must be owned by either a User or a Queue. When a record is created by a process outside of Salesforce, or needs to be worked on by any of a group of people, it makes sense for that record to be owned by a queue.

To create a queue

1. From **Setup**, select **Users** then **Queues**.
2. From the **Queues** page, press **New**.



3. Complete the queue details, then press **Save**.



a. Enter the public name of this queue in the `Label` field. The value in `Label` will be visible as the name of the List View attached to this queue.

b. Optionally enter a `Queue Email`.

c. Optionally select `Send Email to Members`. Members are specified in the **Queue Members** section of the form.

d. Select the Object types that will be stored in this queue. This will determine the record types that are placed in this queue.

e. Select the users who will comprise the **Queue Members**.

f. Press **Save**.

How to identify record ids

Some configuration tasks require the use of Salesforce record IDs. Record IDs uniquely identify a data record.

To obtain a record ID

1. Use the downloadable application Salesforce Data Loader. *See* “How to import, export and update data in Salesforce” on the facing page.
2. Export the record type that contains the record whose ID you are seeking to identify.
3. Open the exported dataset and locate the target record. The record ID is in the field named ‘Id’.

How to import, export and update data in Salesforce

Salesforce provides the ability to import, export and update data using a downloadable Java-based application named Data Loader. Data Loader is used within Franchise Cloud Solutions applications to

- load data during system setup
- obtain record ids for configuration purposes
- migrate customers from one franchise to another

To download Data Loader from Salesforce

1. From **Setup**, search for `Data Loader`.
2. Click the **Data Loader** page.
3. Follow the on-screen prompts.

To learn how to use Data Loader

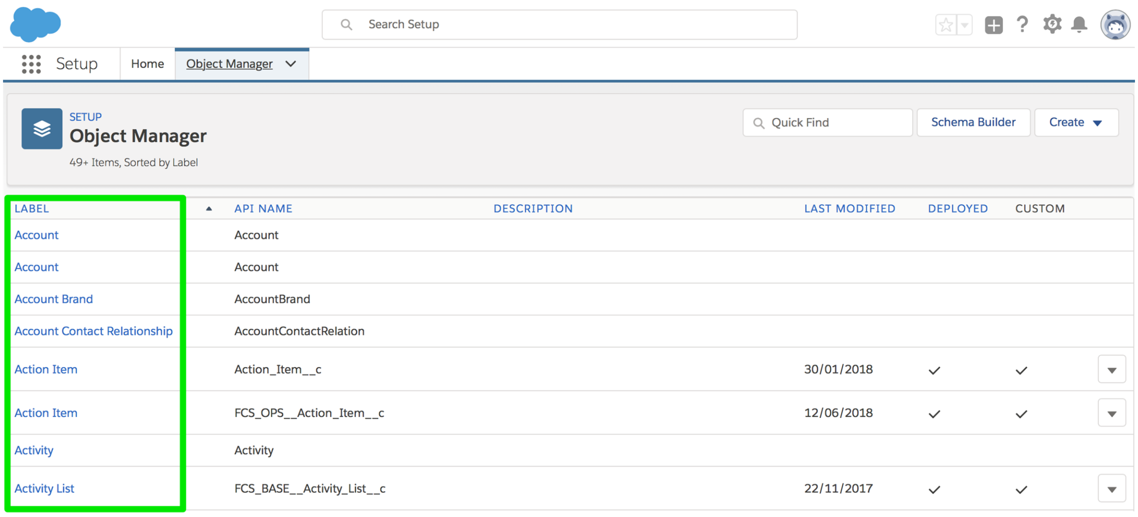
- Refer to Salesforce documentation on Data Loader.

How to identify a Field API Name

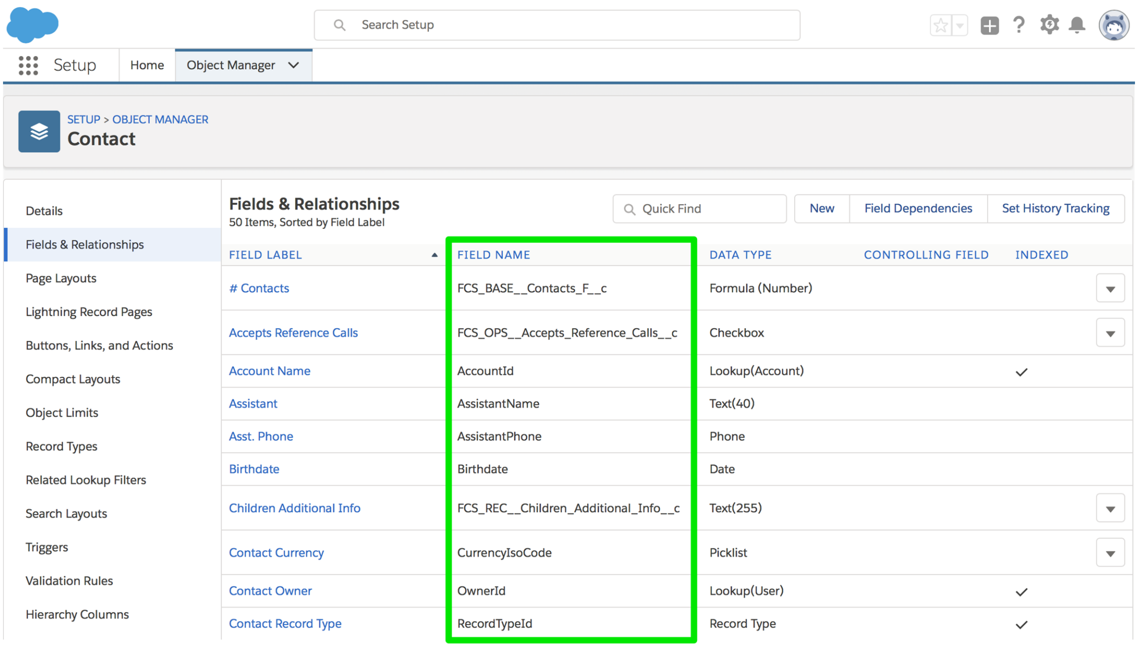
The Field API Name is a unique name that identifies a field.

To determine Field API Names for custom fields

1. Go to **Setup**, and search for `Object Manager`.
2. From **Object Manager**, select the `Label` of one of the records.



3. From the **Object Manager** menu, select **Fields and Relationships**.
4. The Field API Name is listed in the **Field Name** column.



CHAPTER 2

Working with Activity Lists

Understanding activity lists

Implementing repeatable processes is essential to everything from sales processes to handover to the franchise operations team. Activity lists can be a really useful tool to help you do this.

At its heart, an activity list contains a list of tasks, some of which are generated only when a prior task is complete.

> Activity Lists can be attached to any object that:
>
> - is configured for activities (i.e. has an activity history)
> - is not a User, Lead or Contact

Each task can be automatically assigned to an individual to be completed within a certain time-frame. What's great about this is that each task can be assigned to a user dynamically, based on their relationship to the record in question, or on their role within your organization.

When a task is complete, it is noted as complete within the activity list. When there are tasks that depend on this task completing, they are created and assigned to the relevant user.

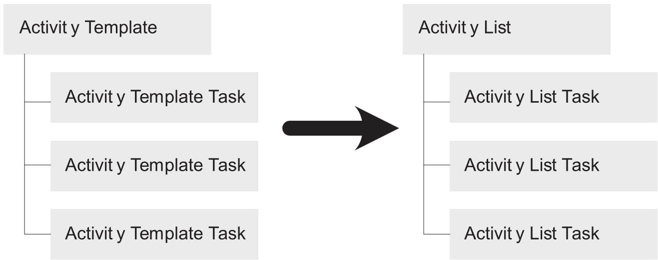
Using an activity list ensures that all the same tasks get done in the same way each and every time, and helps managers track task completion.

Activity List creation

Activity lists can be created manually or automatically.

> **Creating activity lists**
>
> To learn how to create activity lists manually, *See* "Applying an activity list" on page 29.
>
> To learn how to automate activity list creation, *See* "Automating Activity List creation" on page 33.

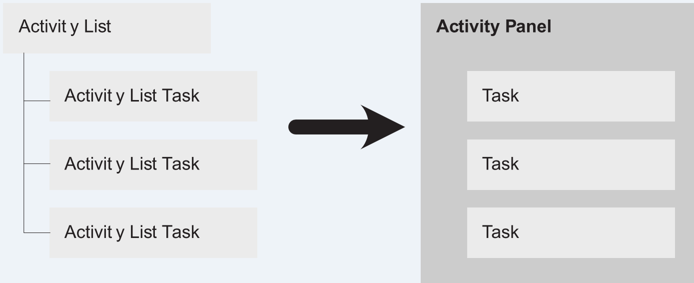
Activity lists are created by cloning an Activity Template.



Once cloned, each Activity List Task is evaluated in the context of a particular record. Any Activity List Tasks that are to be created immediately are created as Tasks. The Tasks are added to the record’s Activity Panel.

Evaluating Activity Lists

All tasks in an activity list are evaluated at the time of creation. Evaluation includes calculating who the expected assignee will be. Once evaluated, any tasks that are not dependent on other tasks completing will be created as Tasks and added to the initiating record's Activity Panel.



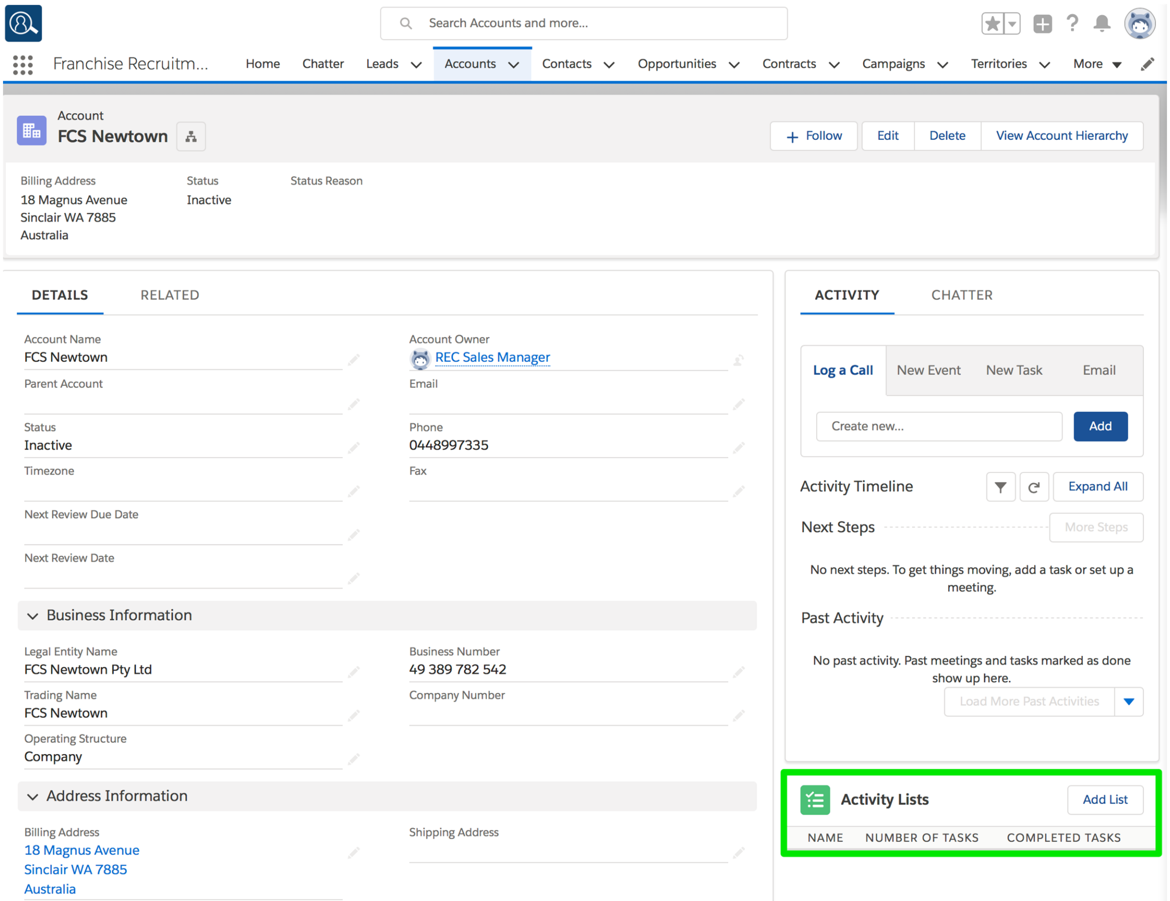
Whenever someone completes a task on which another task depends, the dependent task is re-evaluated to see whether it should now be created. When it is ready to be created, it is created as a Task and added to the initiating record's Activity Panel.

Activity List cleanup

Activity Lists and Activity List Tasks are retained until all Tasks have been completed, plus a specified number of days. Once all Tasks have been completed and the specified number of days elapses, the Activity List and its Activity List Tasks are discarded.

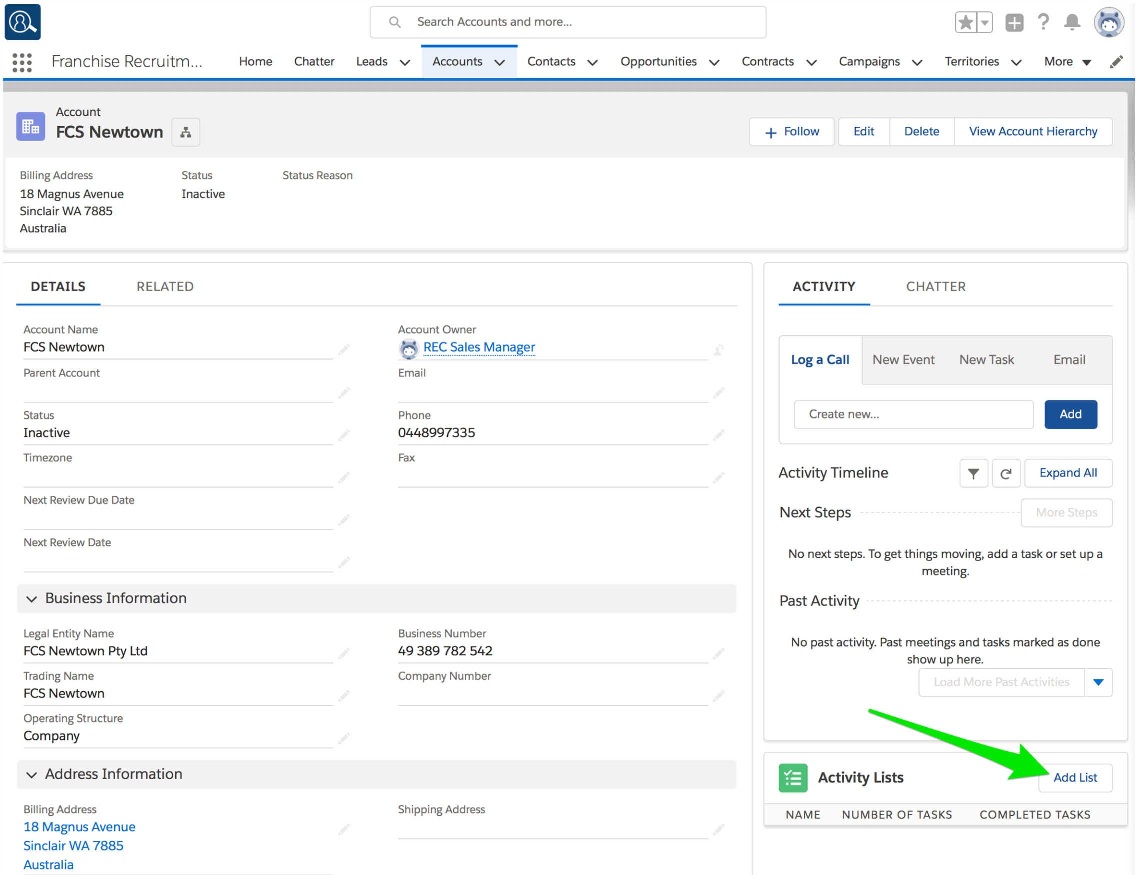
Applying an activity list

An activity list is attached to a specific type of record. When that record type has activity lists available, the **Activity Lists** component appears.



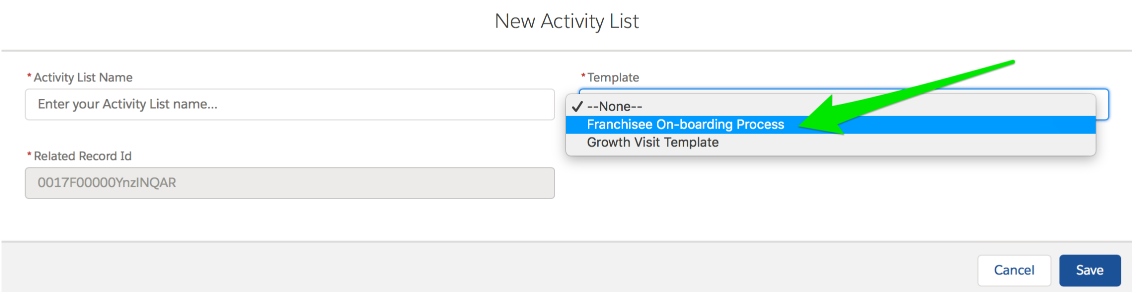
To apply an activity list:

1. From the **Activity List** component, press **Add List**.

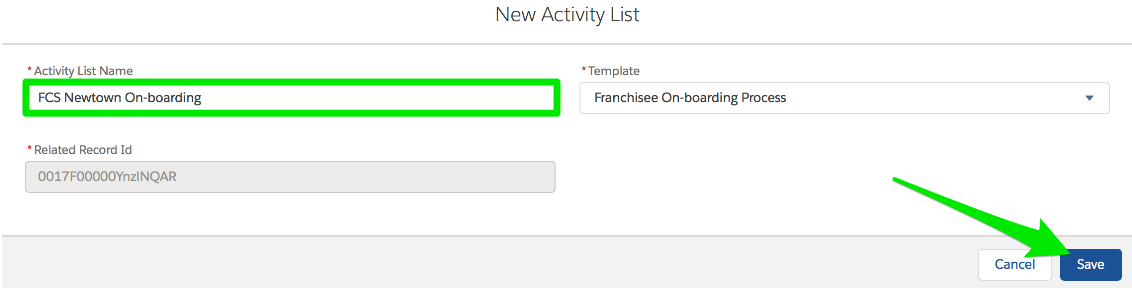


The **New Activity List** dialog box appears.

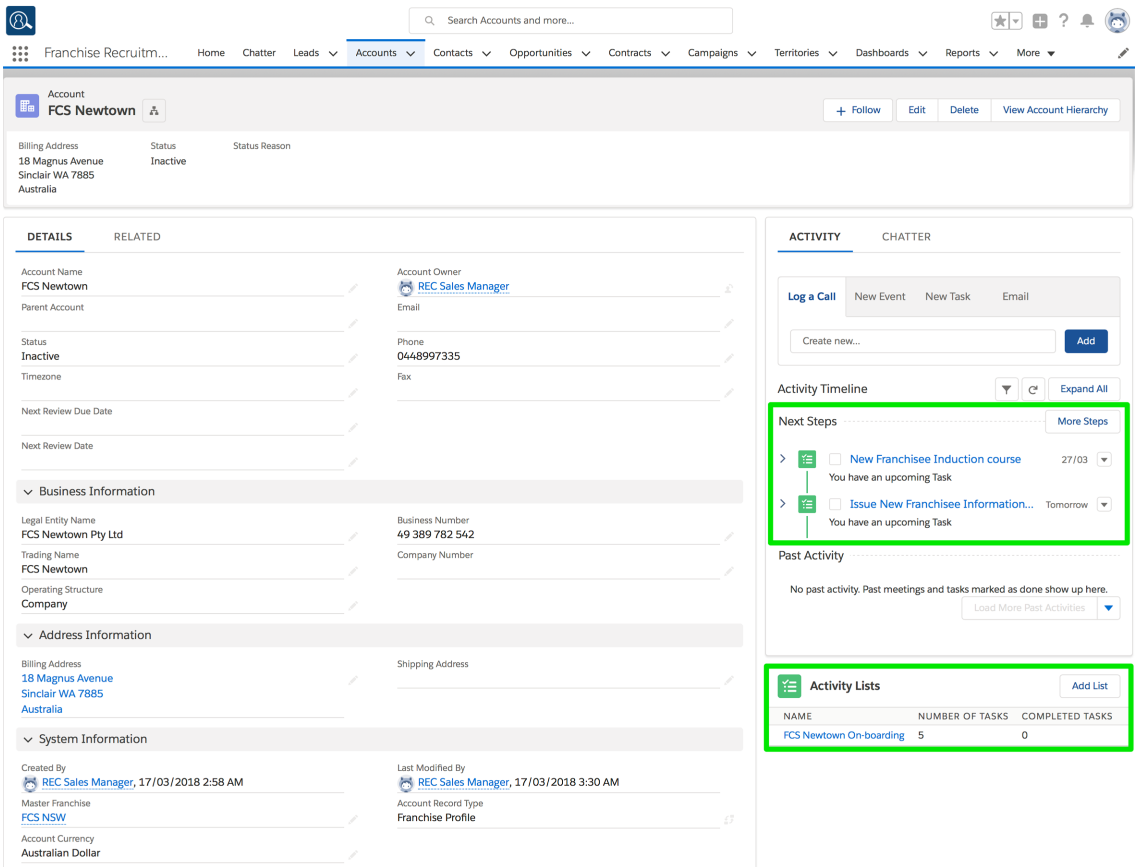
2. Select an available `Template`.



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



The **Activity List** is attached to the record and at least some of the tasks from the list appear within **Next Steps**.



The steps within the activity list are now ready to be completed.

Adding Activity Lists to a Salesforce record page

Delete this text and replace it with your own content.

Automating Activity List creation

Delete this text and replace it with your own content.

CHAPTER 2

Working with Activity Templates

Understanding activity templates

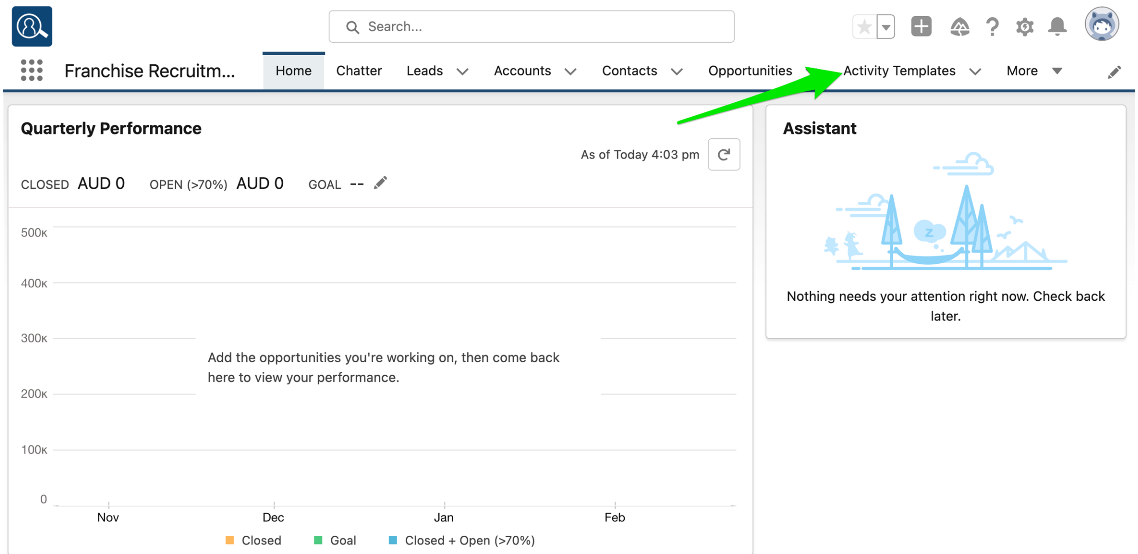
Delete this text and replace it with your own content.

How to create an activity template

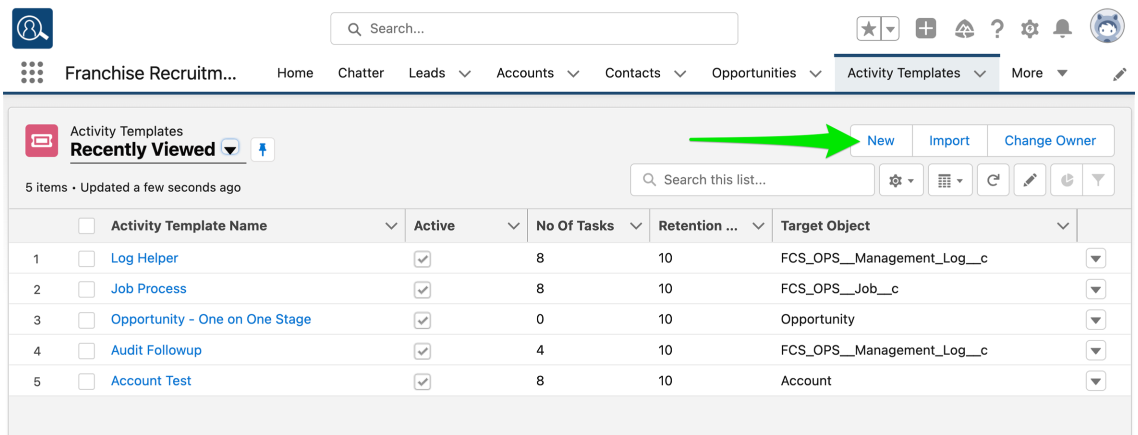
An activity template provides the structure used to generate activity lists. Activity templates are targeted at a particular object type and contain a list of tasks that can be assigned to fixed or variable users.

To create an activity template

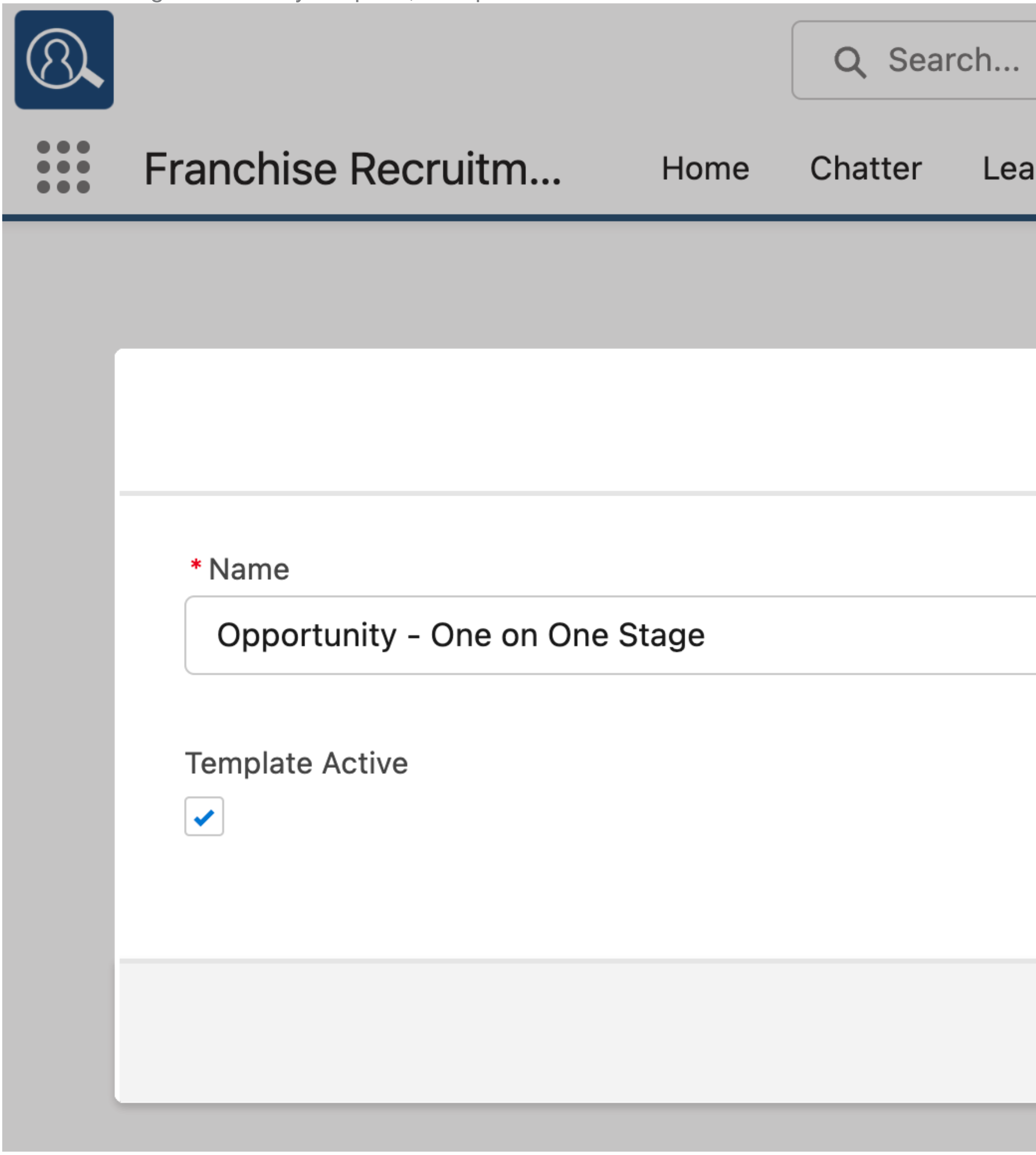
1. From the Salesforce menu, choose **Activity Templates**.



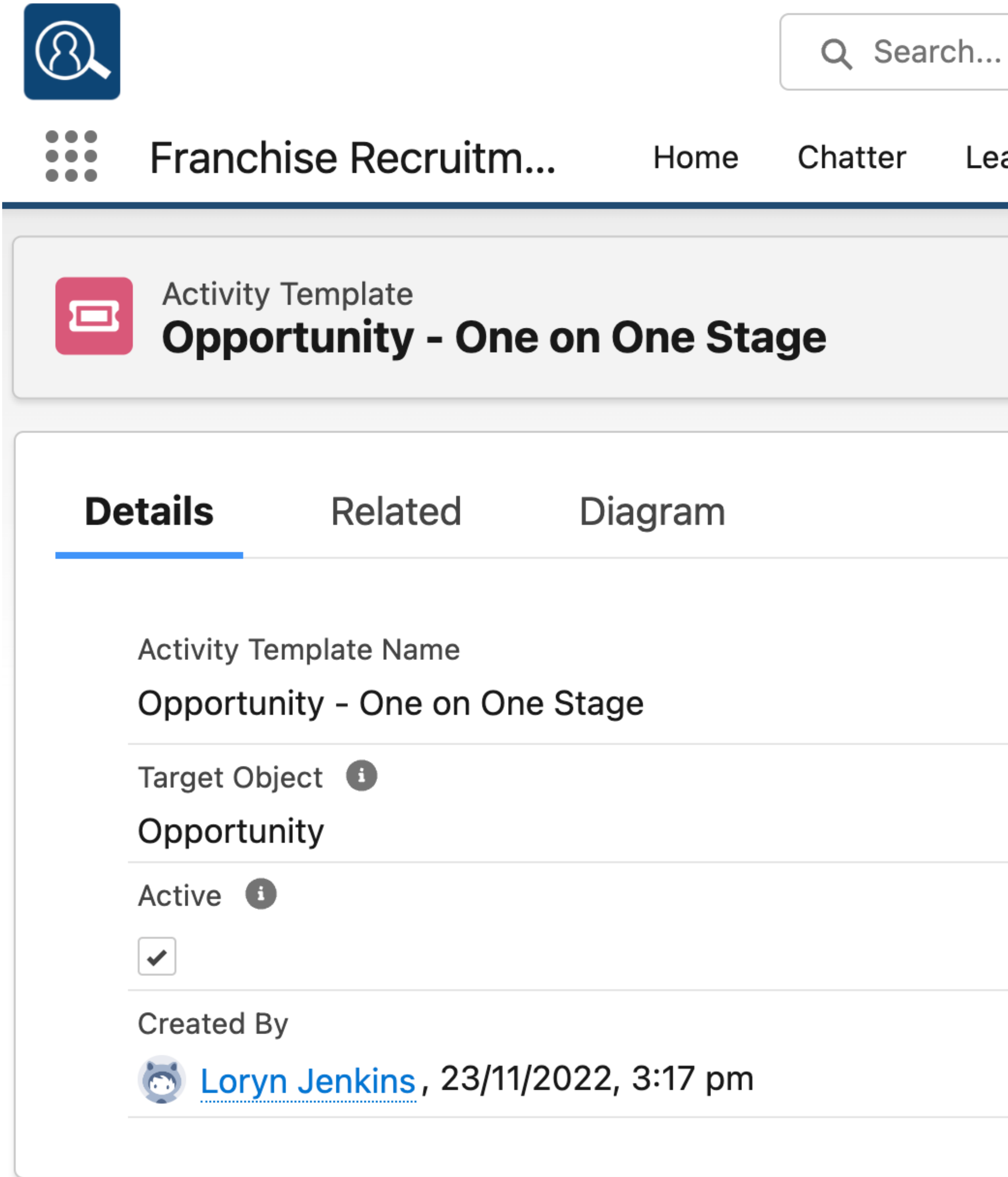
2. To create the template, press **New**.



3. Name and target the activity template, then press **Save**.



The Activity Template header displays.



Field details

- Enter a `Name` as the primary user identifier for the template.

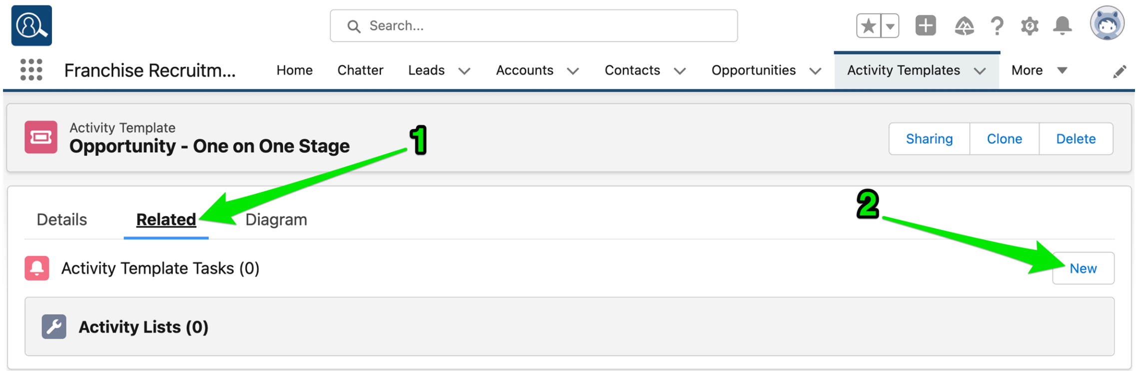
- `Target Object` specifies the object type the activity list can be attached to.
- Set `Template Active` to *`true`* to make the template available to the defined object type. Set it *`false`* it when you no longer want it to be available.
- `Retention Period` defines the number of days after the last task is complete for which the Activity List instance will be retained.

How to create an activity template task

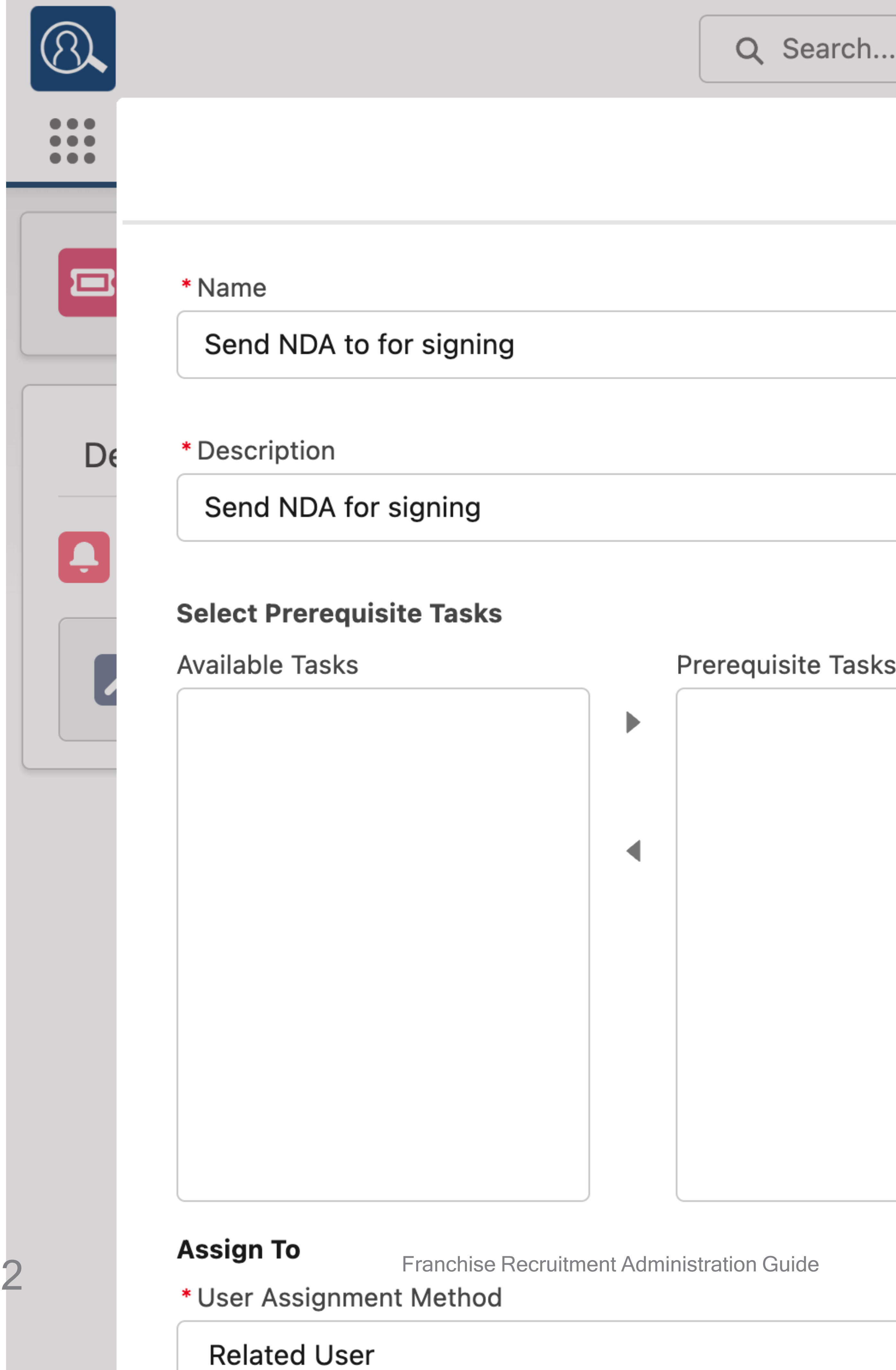
Activity template tasks are how you specify what tasks to create within any activity list generated from this activity template. You create one activity template task for each task you want to generate.

To create your first activity template task

1. From the **Related** tab, create a **New** activity template task.



2. From the **Create Task** box, complete the task details and press **Save**.



Search...
De
* Name
Send NDA to for signing
* Description
Send NDA for signing
Select Prerequisite Tasks
Available Tasks
Prerequisite Tasks
Assign To
* User Assignment Method
Related User

The task is added to the activity list.

Field details

- Enter a `Name` as the primary user identifier for the task.
- Enter `Description` as a further explanation of the task.
- Set `Active` to *`true`* to generate the task at run-time. Set it *`false`* it when you no longer want the task to be generated.
- Insert a URL into the `Documentation Link` in order to relate this task to procedural documentation.
- `Days to Due` sets the due date on the task as the specified number of days after the task is generated.
- Move any `Available Task` into the `Pre-requisite Task` list if you want the task to be generated only on completion of the selected task. For more information, *See* "Make an activity template task dependent on prior activities" below.
- There are three `User Assignment` methods.
  - Select *`Static User`* if there is a single person in your organization who will perform this task. You set the user in the dependent `Assign To` field. *See* "Assign an activity template task to a static user" on the next page.
  - Select *`Related User`* if you want Franchise Recruitment to select a user based on a defined relationship. When this is selected, you need to enter the relationship to be used into the `Related User Relationship` field. You can choose any relationship defined on the target object that looks up a user. *See* "Assign an activity template task to a related user" on page 51.
  - The most commonly used relationship is *`OwnerId`*.
  - Select *`Search User`* when you want to dynamically assign the user who is to complete the task based on role or position hierarchy within your organization. *See* "Assign an activity template task to a searched user" on page 52.

Congratulations

You've added your first activity template task. This will cause a task to be created as soon as any activity list is created. For dependent tasks or tasks assigned to any other user, explore the following topics.

Make an activity template task dependent on prior activities

Delete this text and replace it with your own content.

Field details

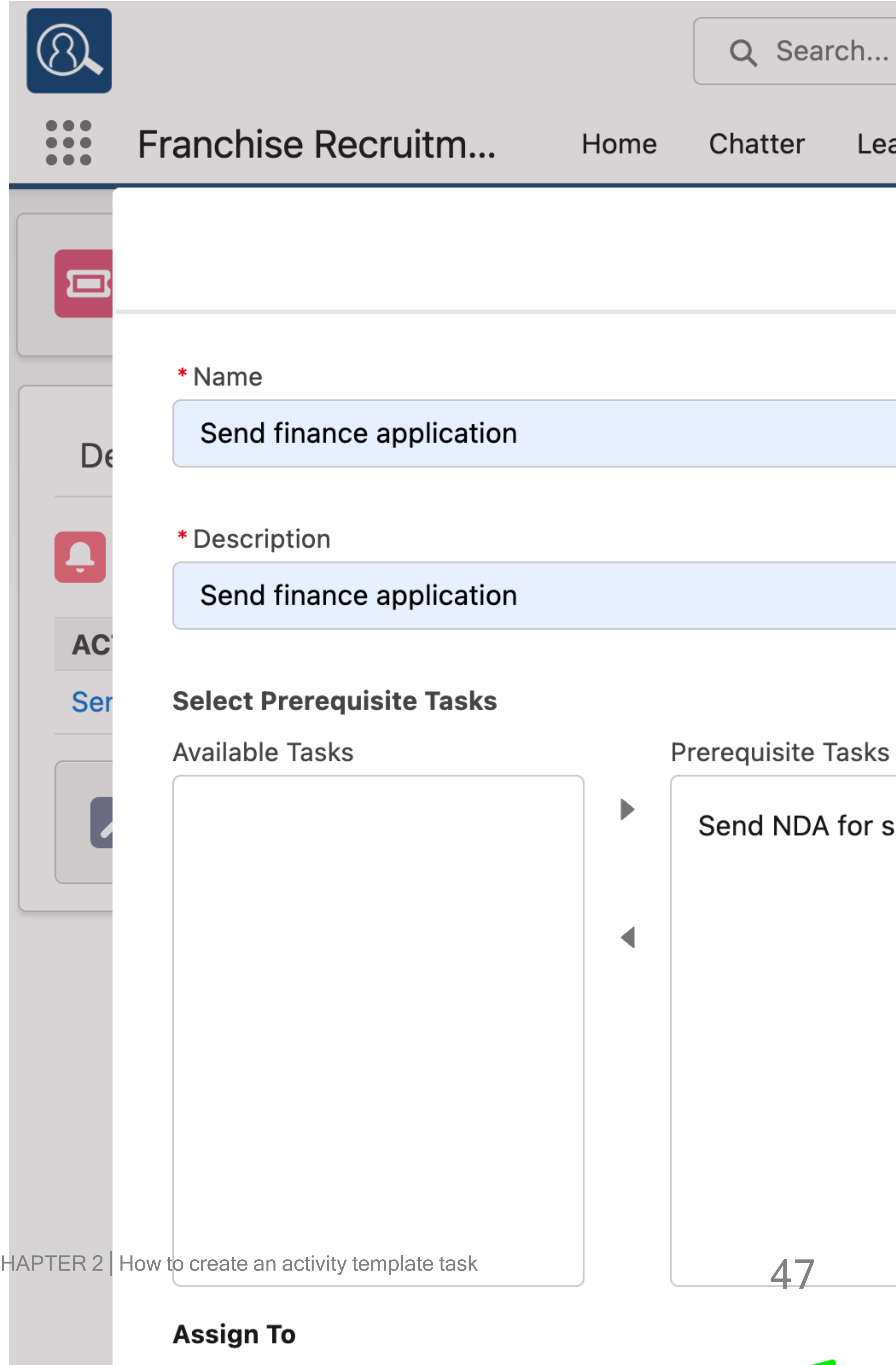
- `Days to Due` sets the due date on the task as the specified number of days after the task is generated. For dependent tasks, this is the number of days after the completion of the task on which it was dependent.

Assign an activity template task to a static user

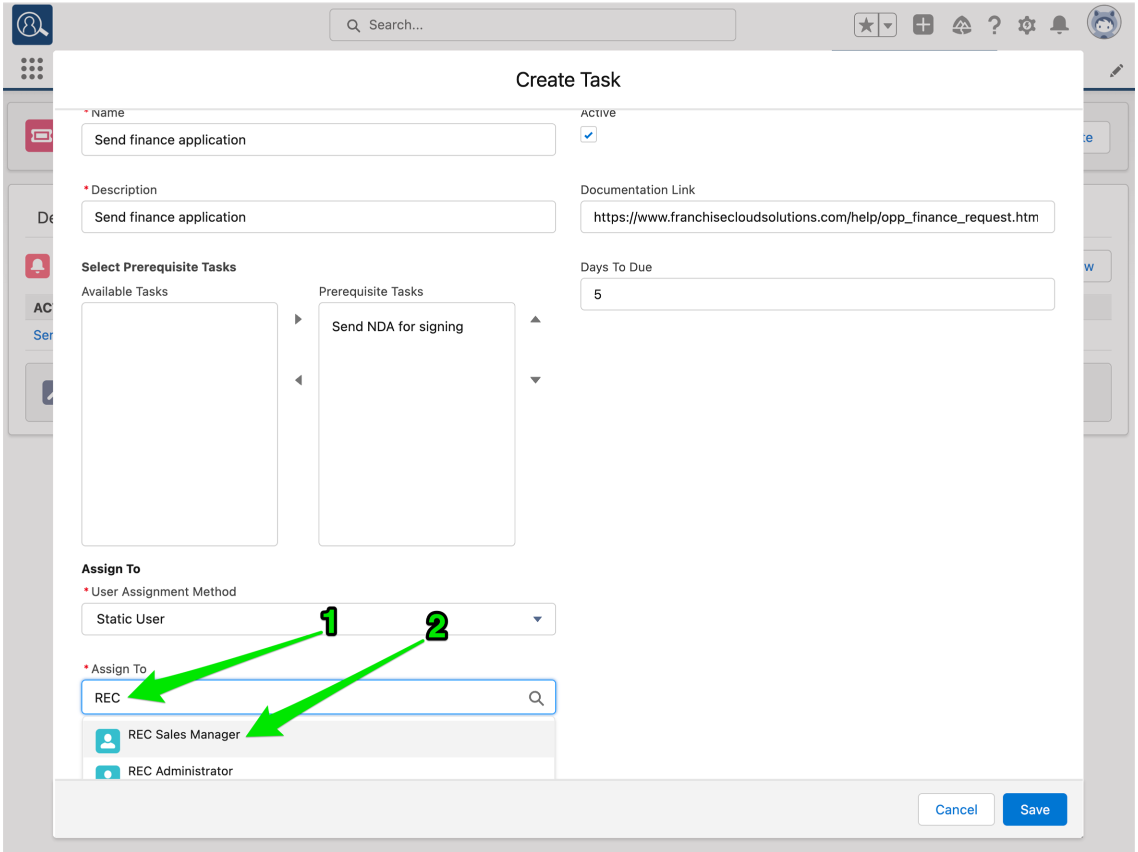
The simplest way to assign any generated task to a user is to assign to a static user.

To assign an activity template task to a static user

1. With the task box open, select from the **User Assign Method** list the option `Static User`.

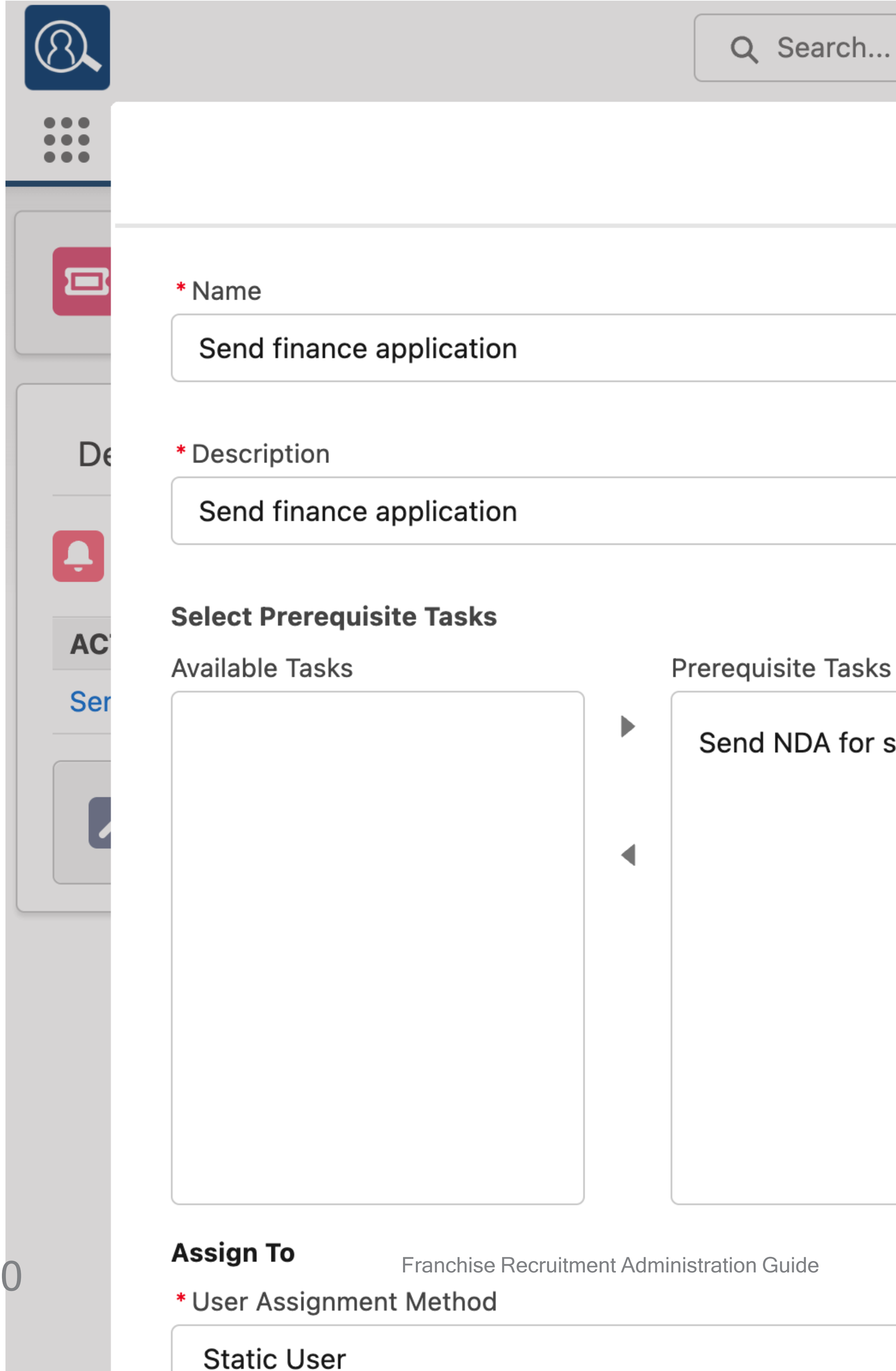

Search...
Franchise Recruitm...
Home
Chatter
Lea
De
ACT
Ser
* Name
Send finance application
* Description
Send finance application
Select Prerequisite Tasks
Available Tasks
Prerequisite Tasks
Send NDA for s
Assign To

2. On selecting the `Static User` method, the **Assign To** field becomes visible. In the `Assign To` field, begin searching for the target user. When the target user becomes visible, select the user from the list.



Typing the name of the user is not sufficient to select them. You must actually select the user from the list.

3. Once you’ve selected the user, you can then press **Save**.


Search...
De
ACT
Ser
* Name
Send finance application
* Description
Send finance application
Select Prerequisite Tasks
Available Tasks
Prerequisite Tasks
Send NDA for s
Assign To
* User Assignment Method
Static User

Beware

Although assigning a task to a static user is convenient, it does have some downsides.

- If the person leaves the company, you will have to review any activity template tasks to ensure any tasks assigned to them are remapped to another user.
- If the user is set to inactive, instead of being assigned to the inactive user, the user will be assigned to the creating user. If you begin seeing tasks being assigned to the person who created the activity template task, it's a sure sign something needs some attention within the activity template task.

To overcome some of these limitations, consider using either of the other two user assignment methods.

Assign an activity template task to a related user

Related User Examples

The examples below are based on the **Account** object. It shows field references on both the Account object and in related objects. To learn about field references, *See* "How to identify a Field API Name" on page 24.

Object: Account	Comments
OwnerId	The account owner.
FCS_OPS__Field_Manager__c	The account's field manager.
FCS_OPS__Field_Manager__r.ManagerId	The account's field manager's manager.
FCS_BASE__Master_Franchise__r.OwnerId	The account owner of the master franchise.
FCS_BASE__Master_Franchise__r.Owner.ManagerId	The manager of the master franchise's account owner. Requires the user object's **Manager** field to be filled.

Related User queries must return user ids

The target of a Related User relationship must result in a user id that identifies a user (and not another type of ownership, such as a queue).

Assign an activity template task to a searched user

Delete this text and replace it with your own content.

Searched User Example

The example below is based on the Account object. It uses packaged and custom fields.

Object: Account	Comments
WHERE State = Account.FCS_BASE__Master_Franchise__r.FCS_OPS__State_Custom__c AND Role_Identifier__c LIKE '%State Manager%'	Searches for a user whose State matches the FPA's Master Territory's State, and has a Role Identifier (a custom field) containing the string "State Manager".

CHAPTER 3

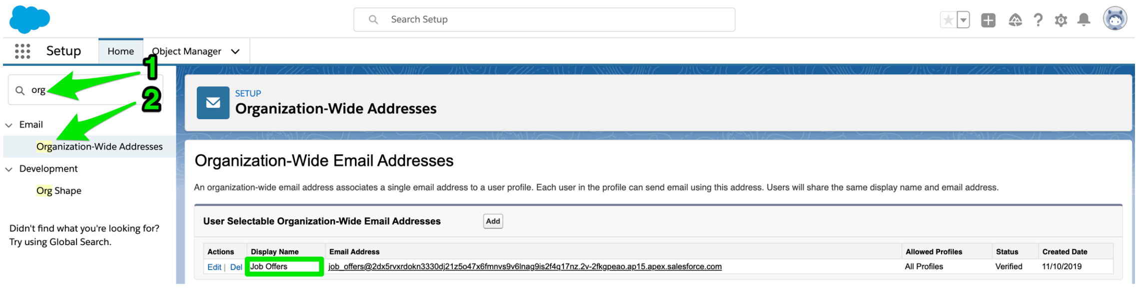
Working with Email

How to configure an organization wide email address

Notifications of Job Offers via email requires an organization wide email address to be configured. When Two Way Email is setup during implementation, this address will have already been configured. If you are configuring a new Configuration Set, you may need to set the Organization Wide Email address in that Configuration Set.

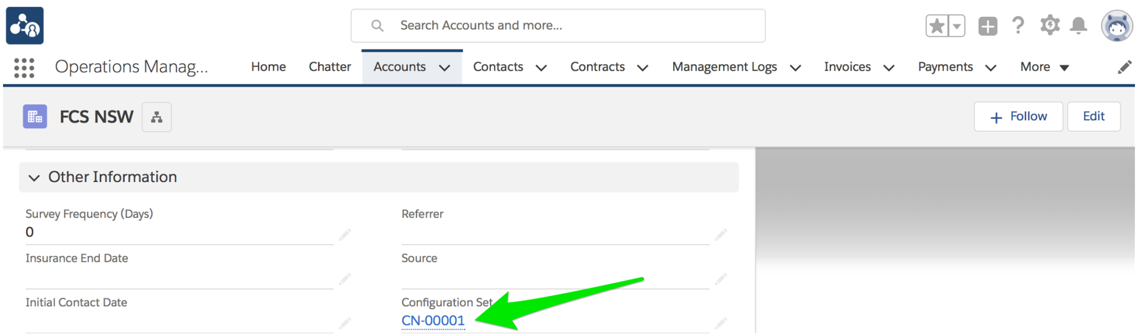
To configure the Org Wide Email Address

1. Go to the Salesforce **Setup** and search for `Organization-Wide Addresses`.

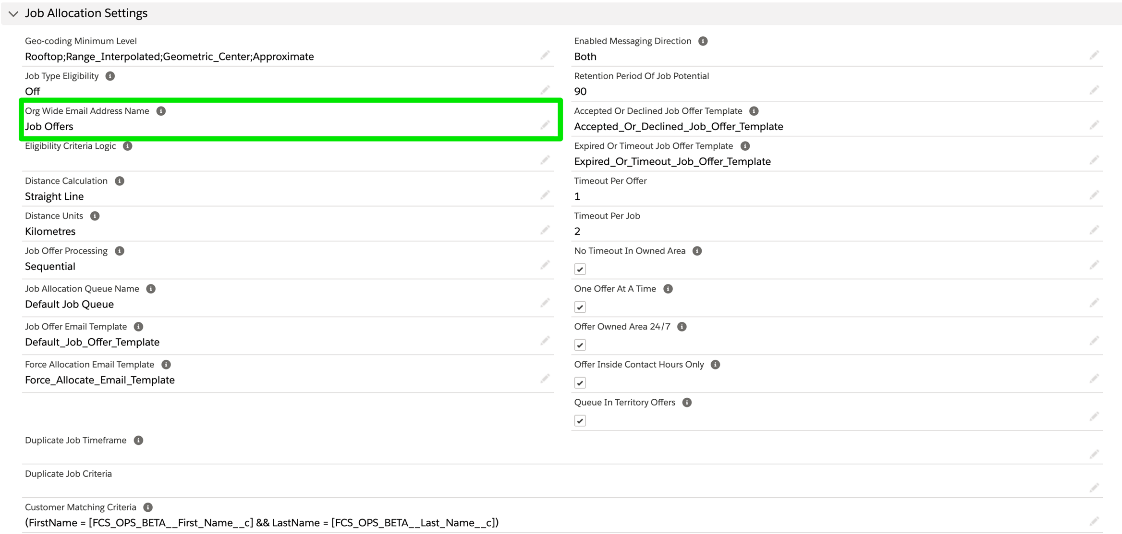


The **Organization-Wide Email Address** identifier is displayed in the `Display Name` field.

2. Now find the `Configuration Set` field within the relevant Master Franchise Profile Account, and click through to the **Configuration Set**.



3. From the **Configuration Set**, locate the **Job Allocation Setup** section, and enter the email address into the `Org Wide Email Address` field.



How to set up an email signature block

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

Who does what?

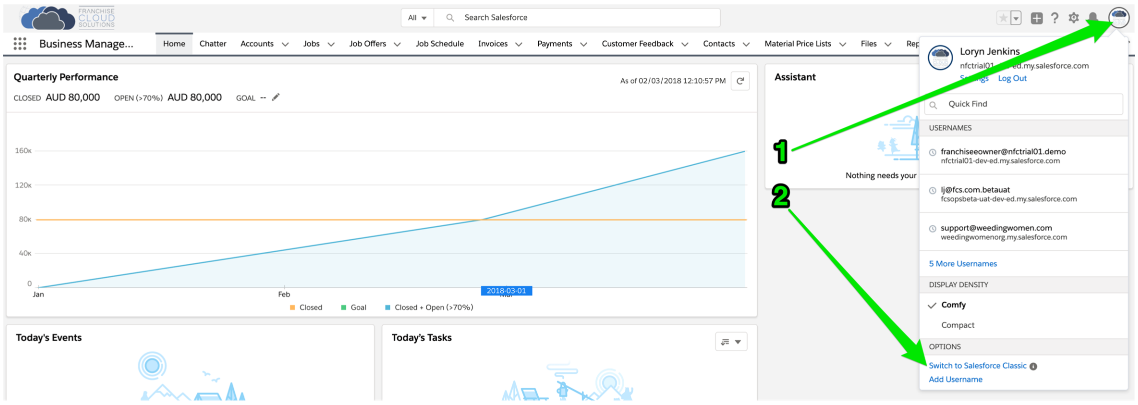
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Each user can set up their own standard signature block. Systems administrators are required to set up rich text signatures.

Loading images for display outside of Salesforce

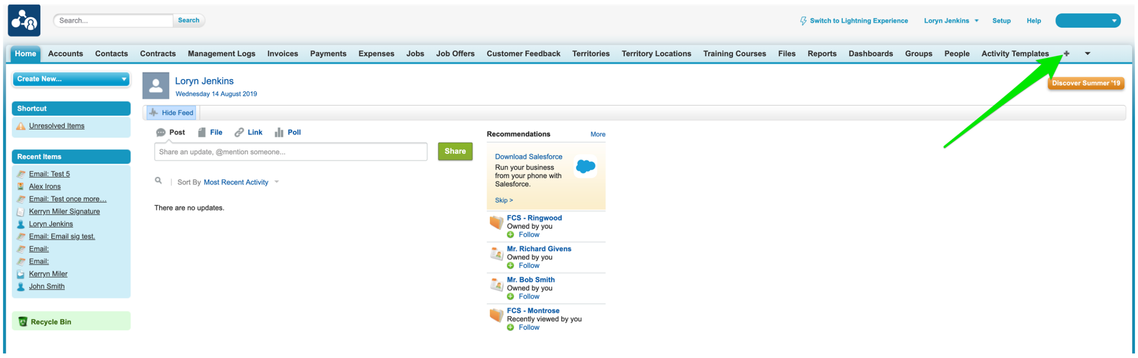
If your users are wanting to set up a signature block containing one or more images, the instructions below explain how to do it. In the example below, the image represents the entire signature block. If the image is only one element of the signature block, the process would be similar.

To obtain a signature block URL

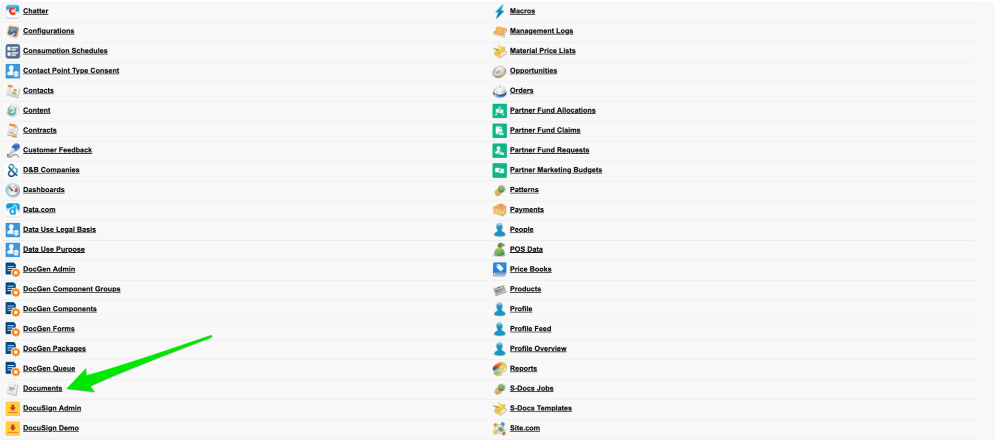
1. Obtain a signature block image for a user.
2. Within Salesforce, switch into Classic.



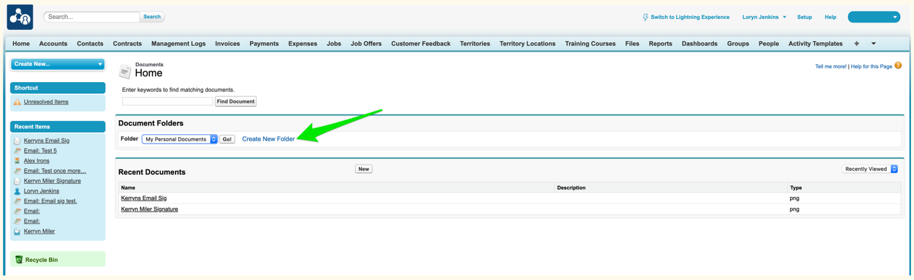
3. Find the documents tab, either in the menu or by pressing the **+** icon.



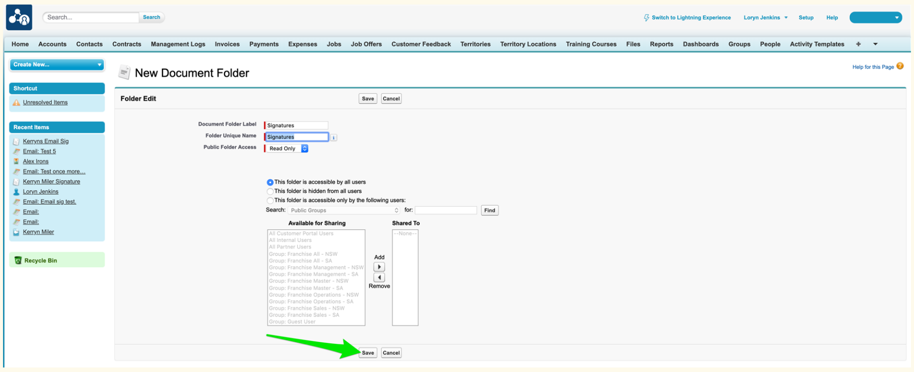
4. Now scroll down and select **Documents**.



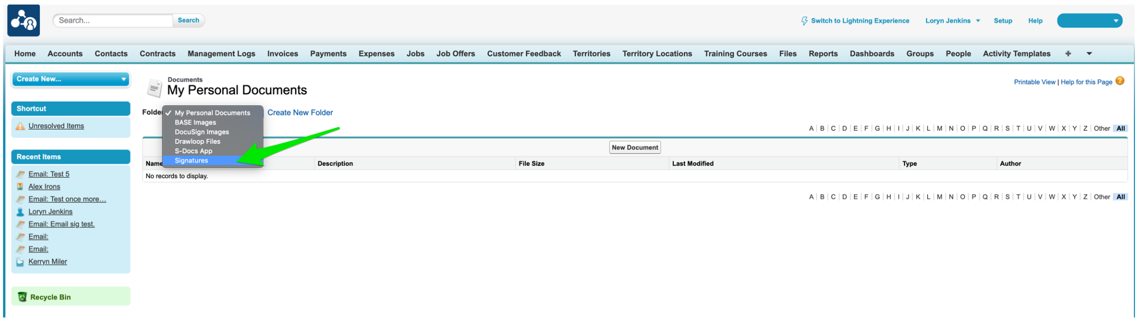
If this is the first signature you have uploaded, create a new folder for all email signatures called `Signatures`.



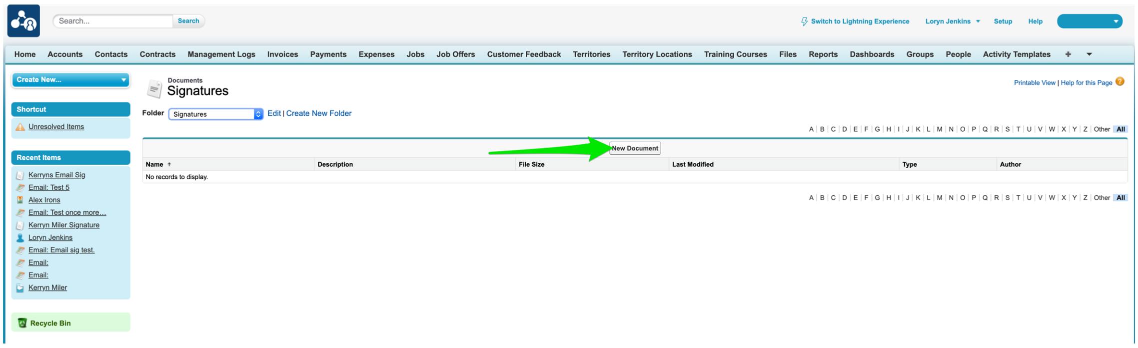
Complete the `Signatures` folder details, then press **Save**.



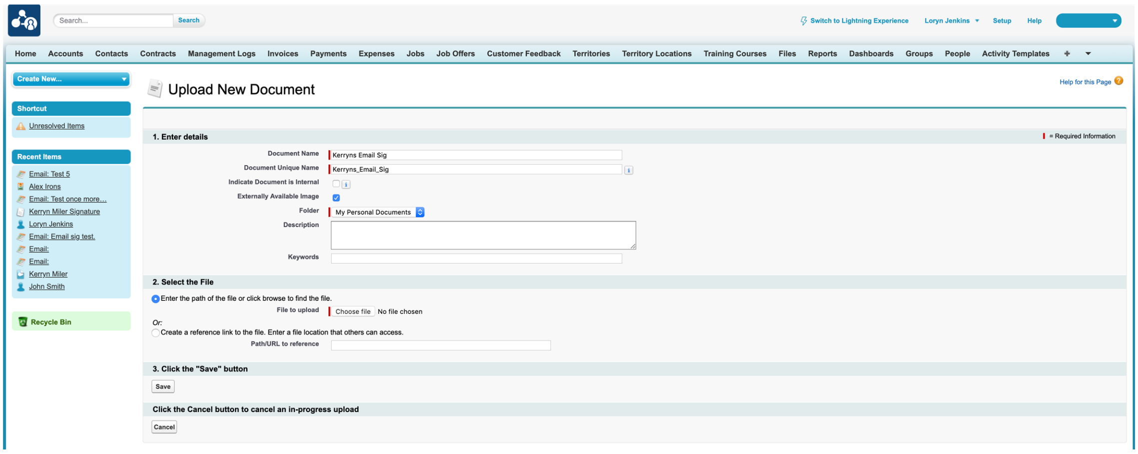
5. Switch to the `Signatures` folder.



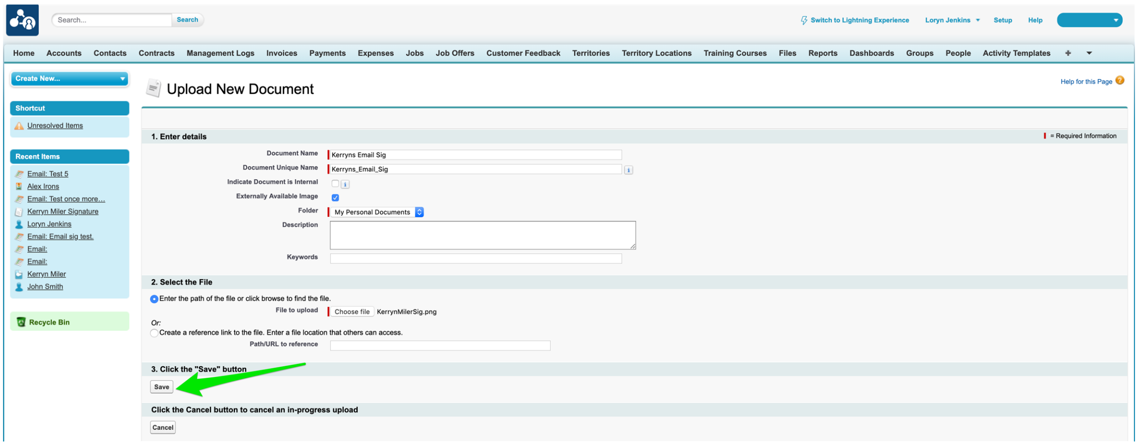
6. From the `Signatures` folder, press **New Document**.



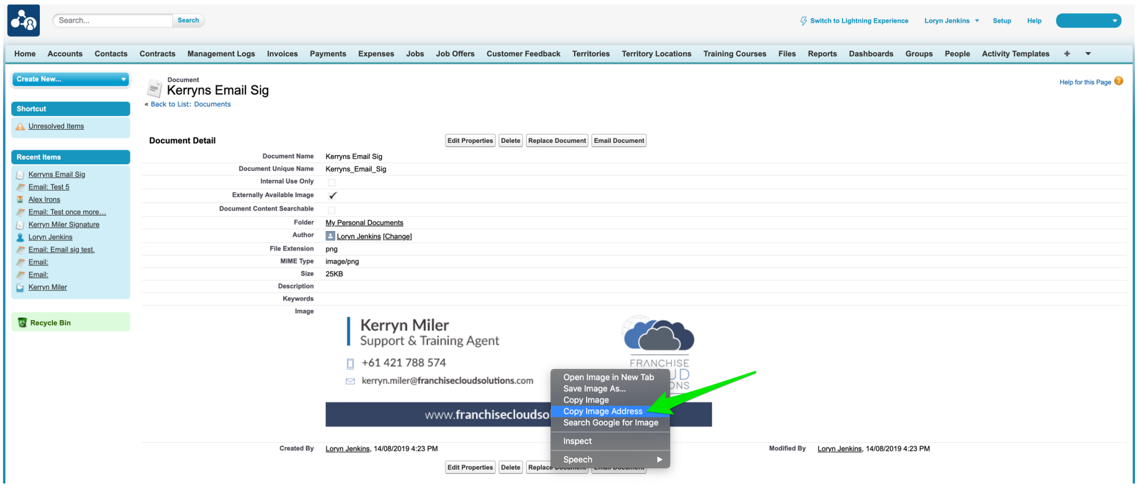
7. Complete the details. Make sure you check `Externally Available Image`.



8. Upload the file using **Choose file**, then press **Save**.



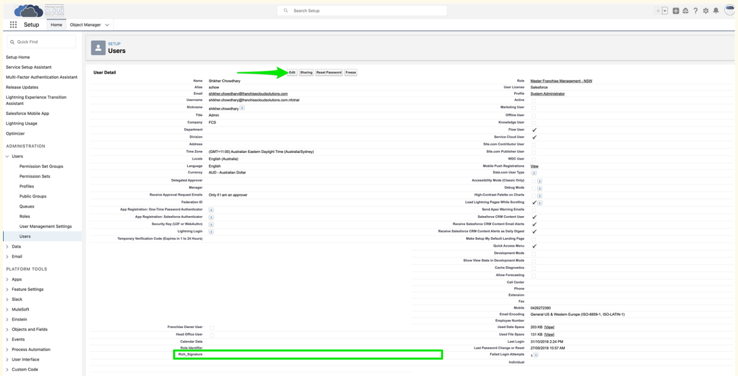
9. The document appears, displaying the email signature. Using your right mouse button, select **Copy Image Address**.

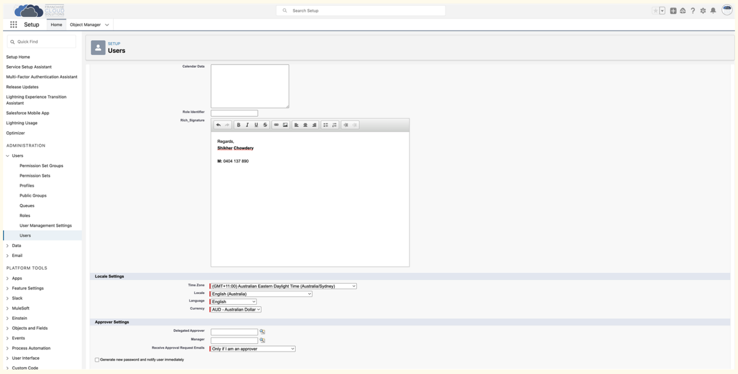


10. Wrap the copied URL into an HTML image tag. Replace *your link* in ** with the copied image address. Distribute the URL wrapped in the img tag to the appropriate user.

Rich Text Signatures

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



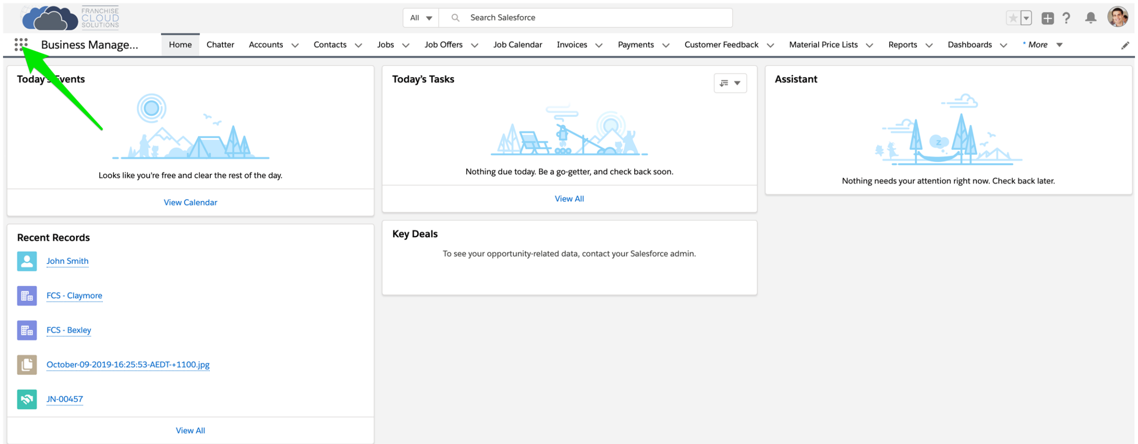


How to edit email template headers and footers

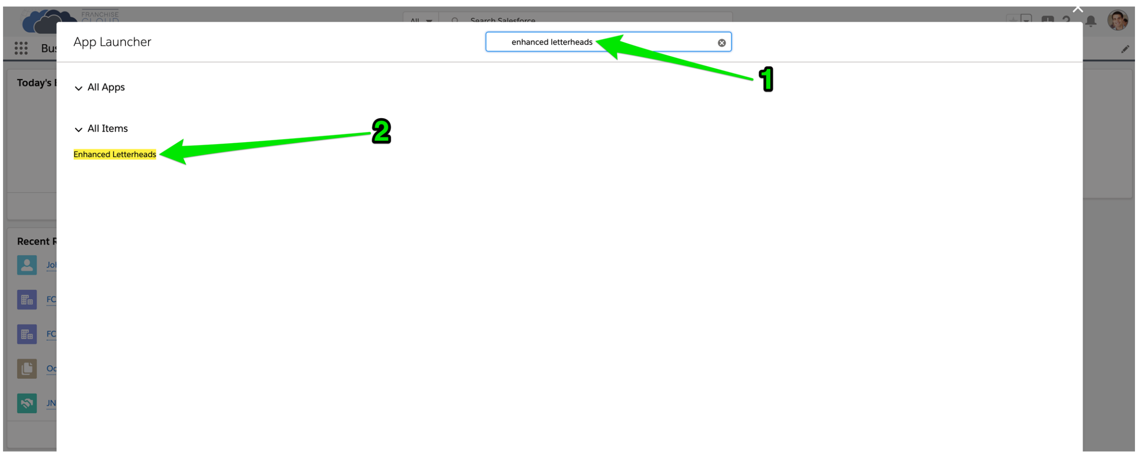
Most likely you will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

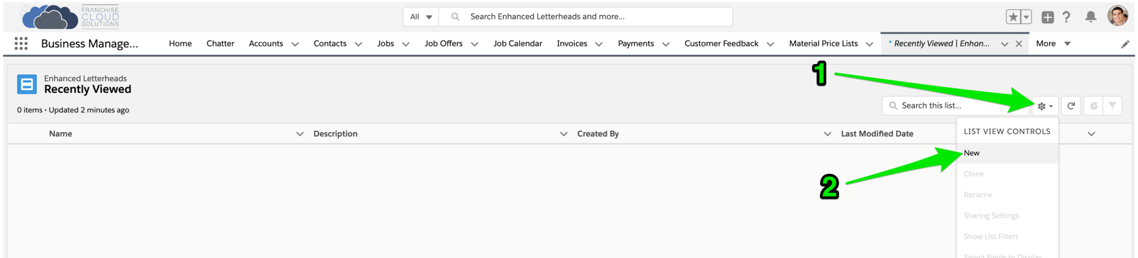
1. Open the **App Launcher**.



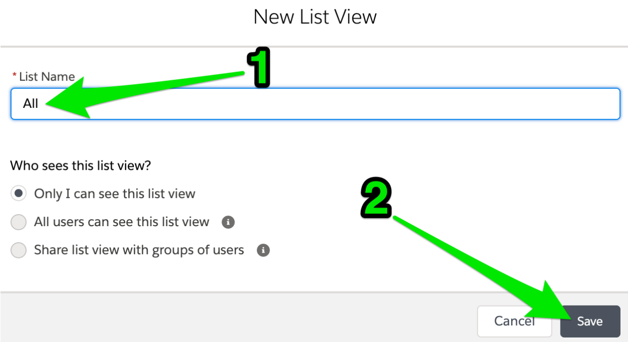
2. In the **App Launcher** `Search` box, enter *`enhanced letterheads`* and select the **Enhanced Letterheads** link.



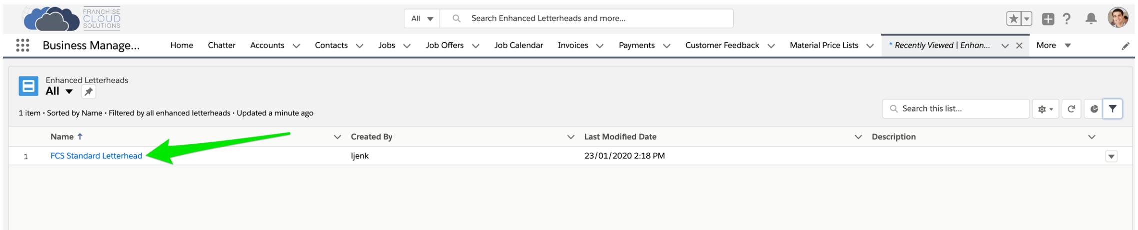
3. You may see an empty **Enhanced Letterheads** list. To see any of the letterheads, create a **New** list view.



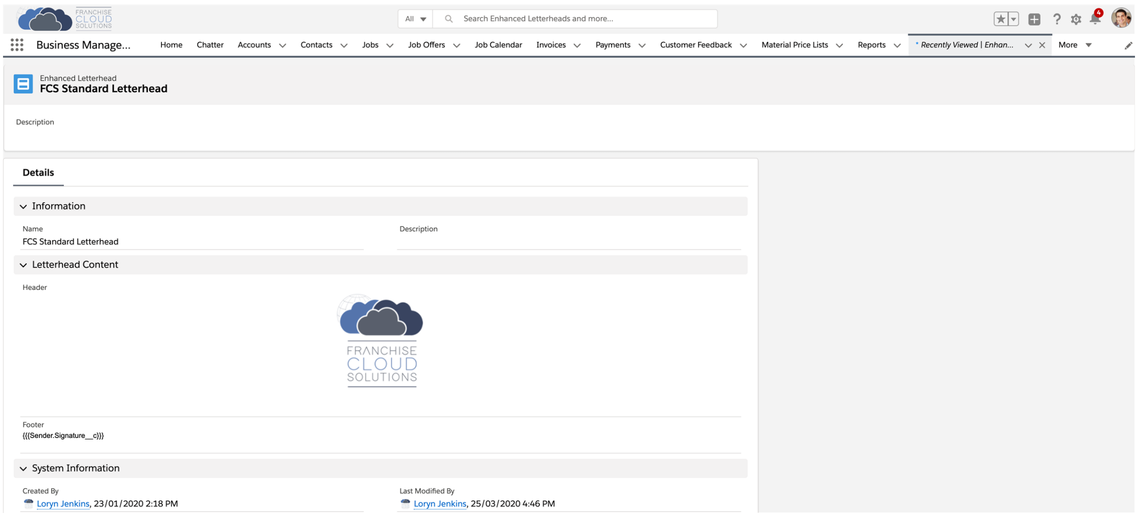
4. Name the list view and press **Save**.



5. Now select the Standard Letterhead.



6. You will be able to edit the Standard Letterhead.



There may be more than one Letterhead available within your implementation. If there is, review each letterhead to see which one(s) you might like to use. You can add letterheads to any custom email template you might choose to create. *See* “How to create a custom email template” on the facing page.

How to create a custom email template

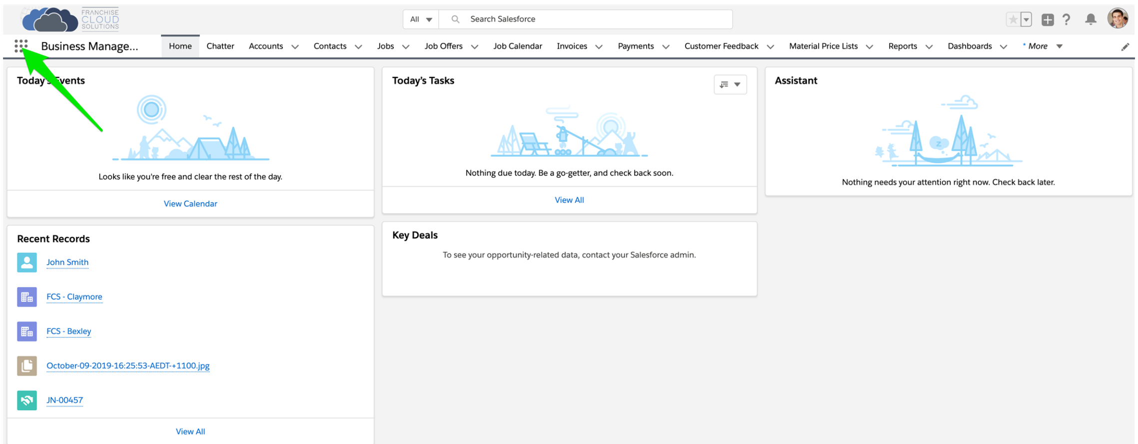
Custom email templates allow you to produce professional email communications for each standard customer touch-point. They often consist of

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

> Email templates that are frequently created by our clients include
> - New customer initial contact
> - Returning customer initial contact
> - New Quote Job request
> - New Do & Charge Job request
> - Scheduled appointment notification
> - Quote email
> - Invoice email
> - Invoice overdue

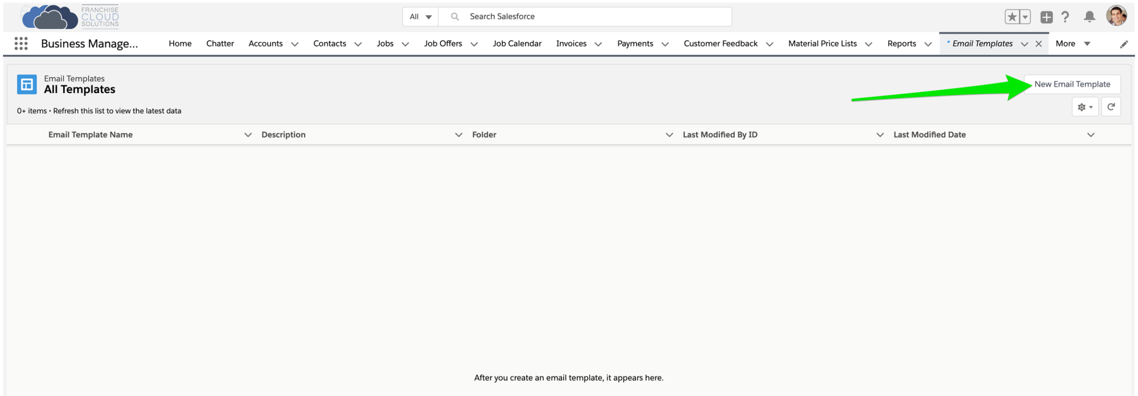
To create a custom email template

1. Open the **App Launcher**.

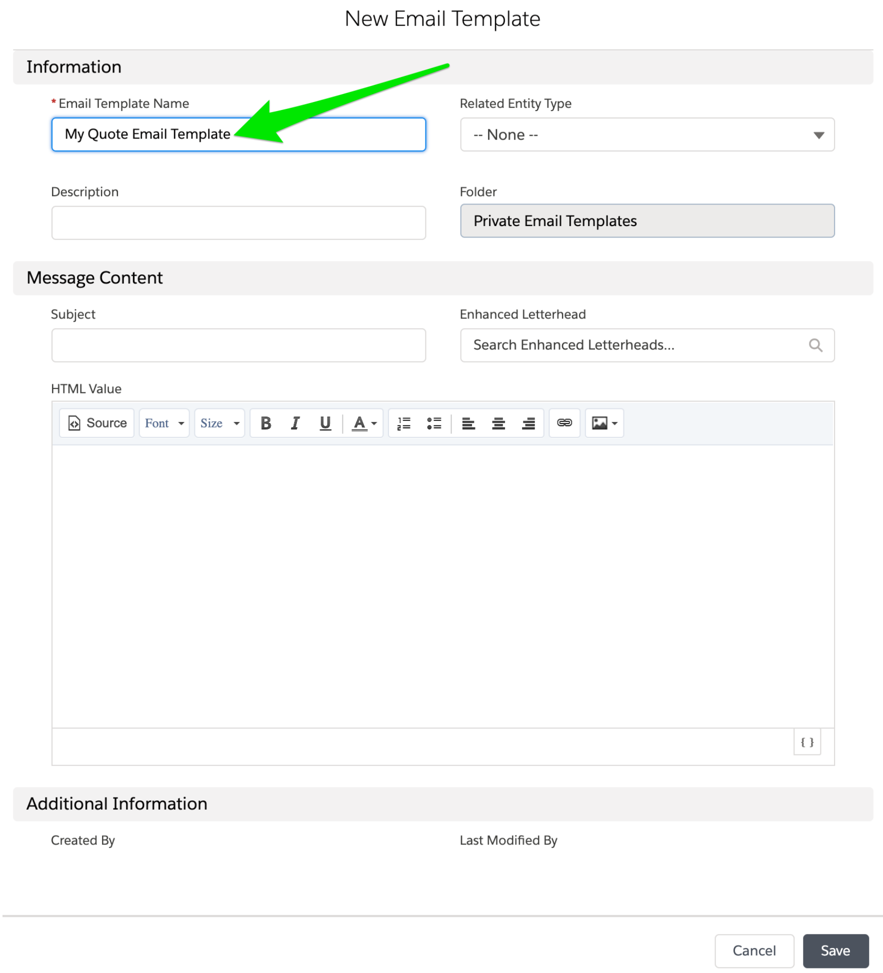


2. In the **App Launcher** `Search` box, enter `email templates` and select the **Email Templates** link.

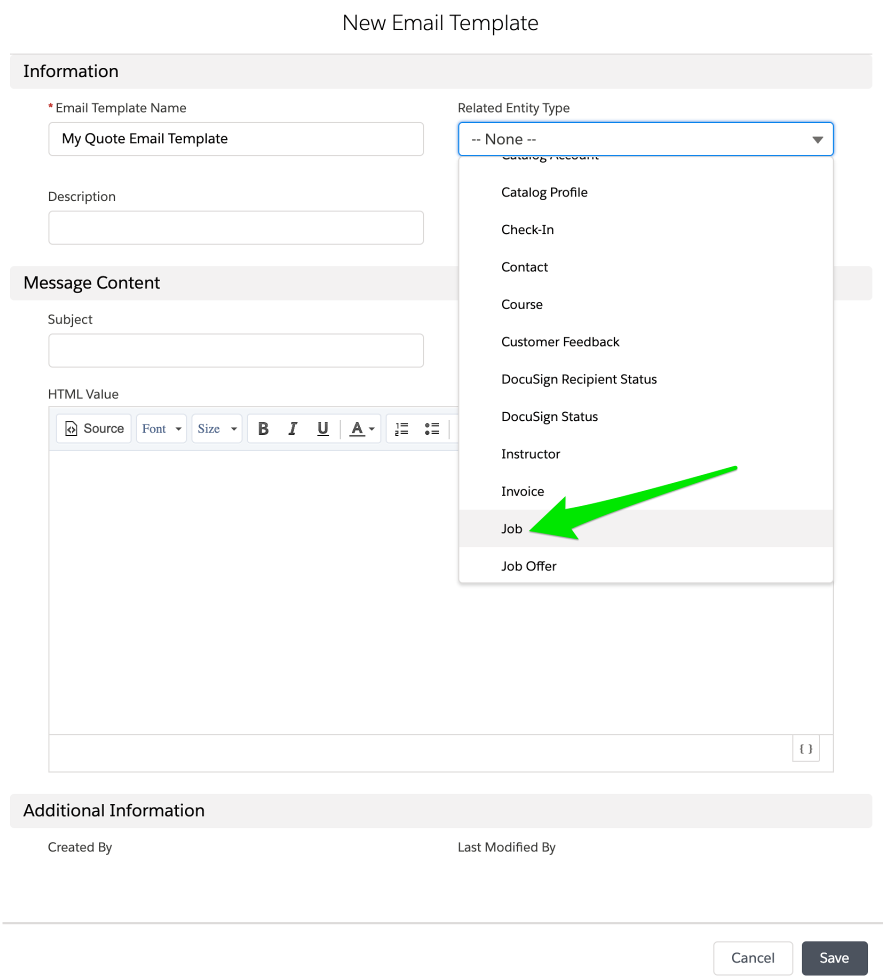
3. You may see an empty **Email Templates** list. Press **New Email Template**.



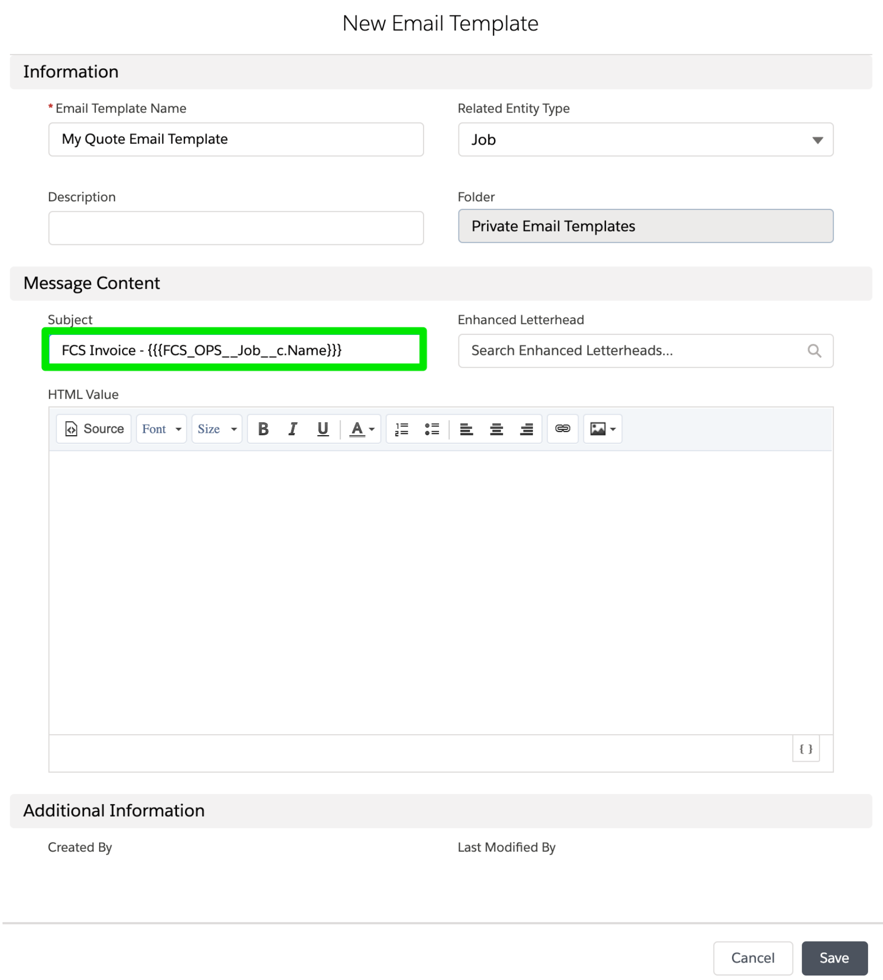
4. Insert an email template name that will help you identify it.



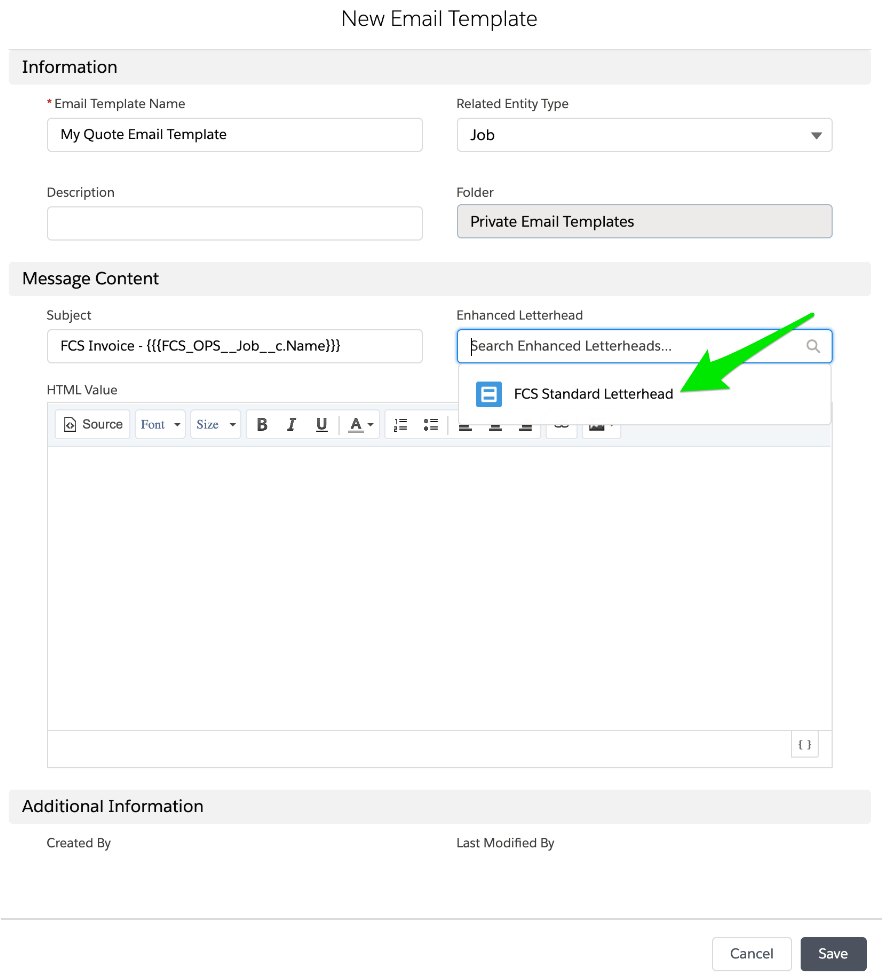
5. If you are going to use merge fields, you must base the email template off a particular entity type. Leads should be based on Lead. The related entity type you choose will determine which fields are available for merging and where this template will be visible within Salesforce.



6. Enter an email subject line.

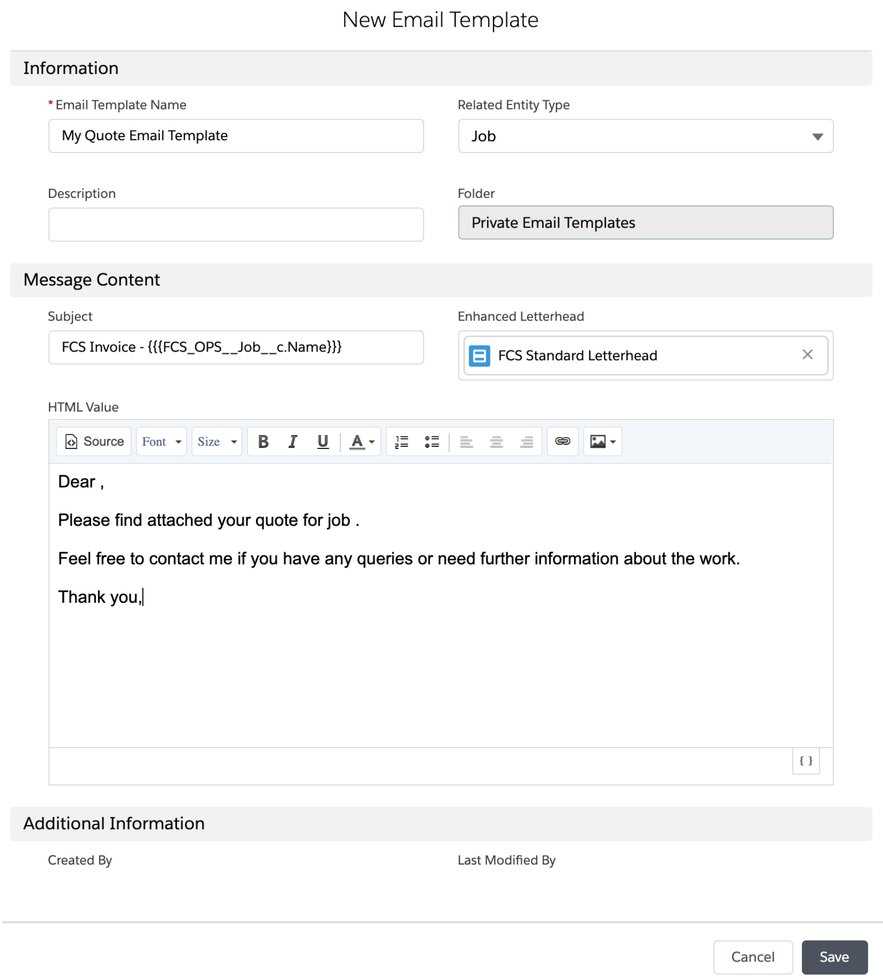


7. Select an appropriate letterhead.

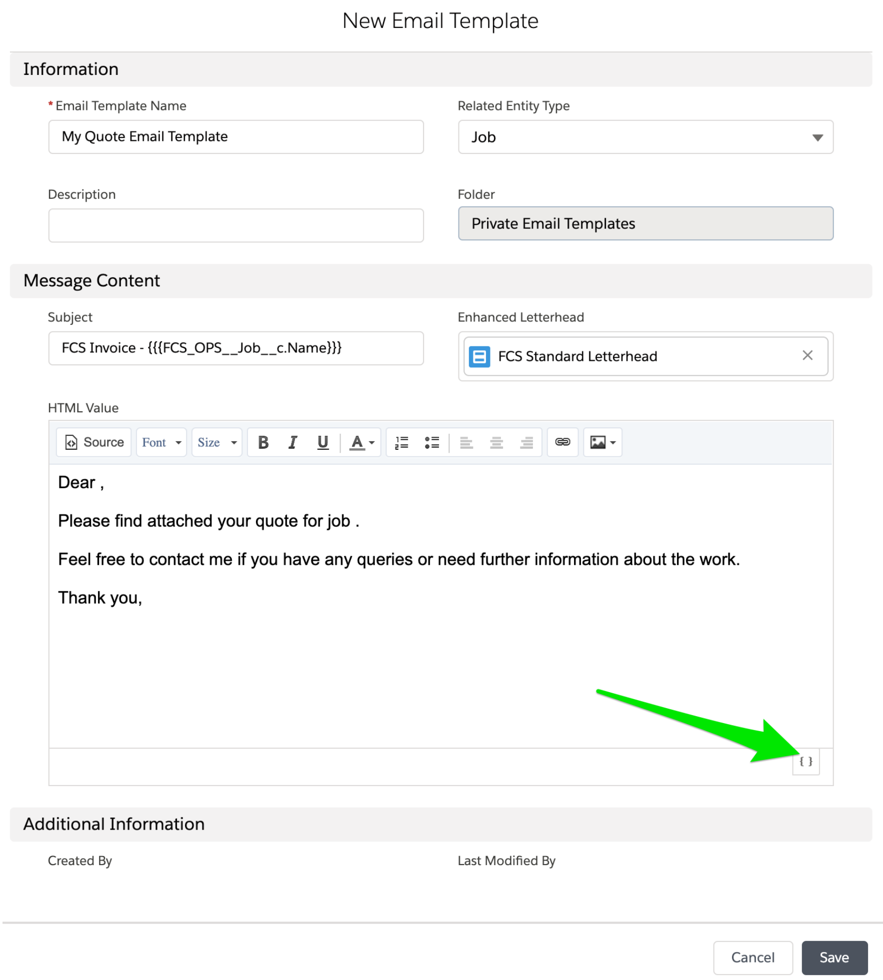


You can review the available letterheads. *See* "How to edit email template headers and footers" on page 62.

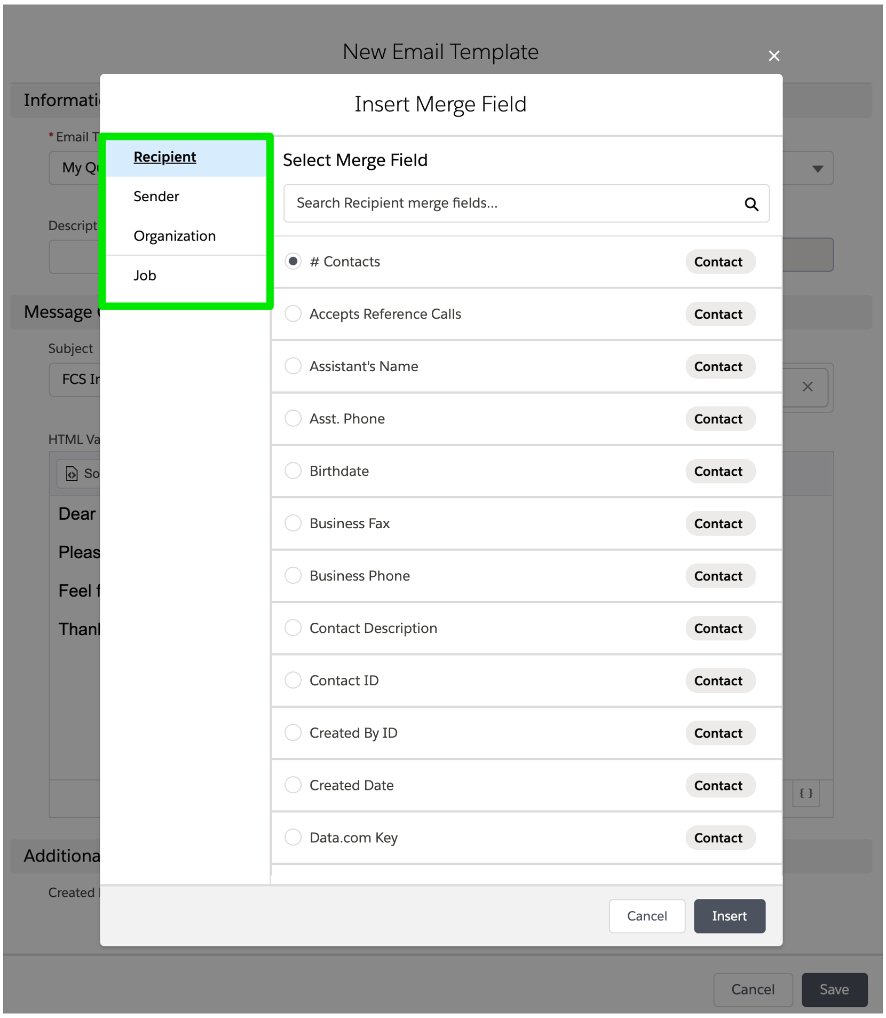
8. Enter boilerplate text into the `HTML Value` field.



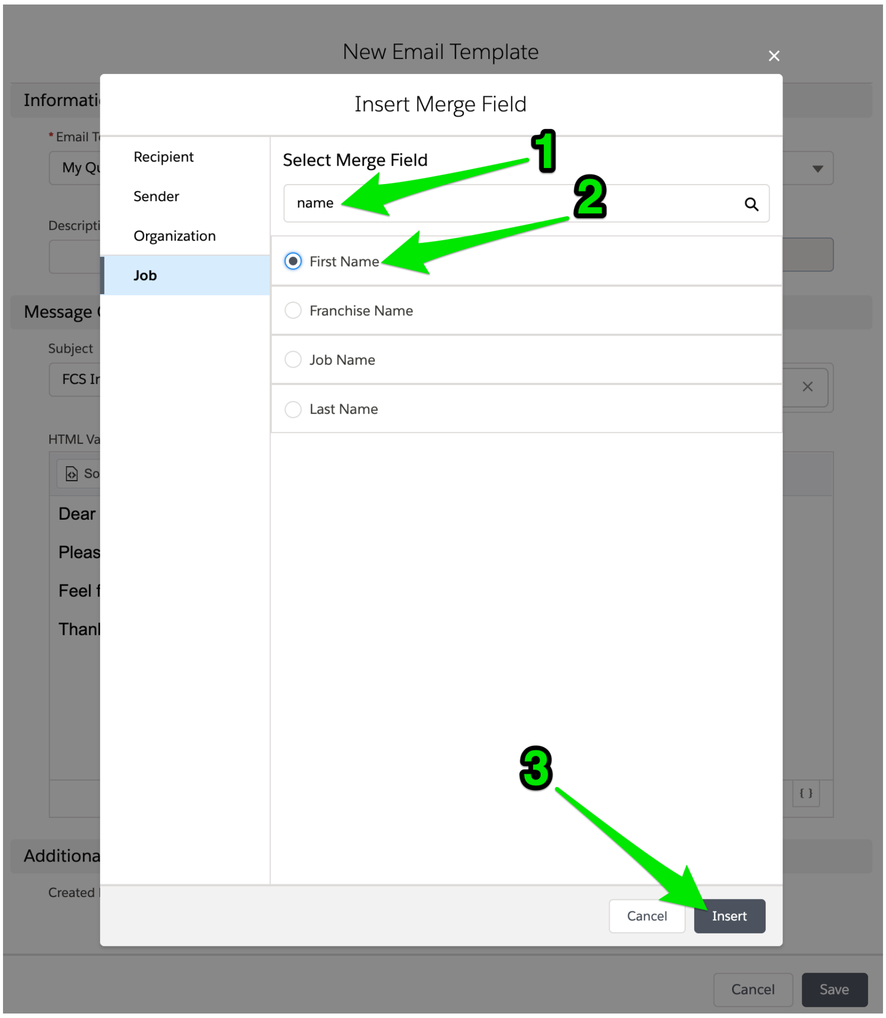
9. To insert variables into the email template body, press the **Insert Merge Field** button (i.e. the brace button { }).



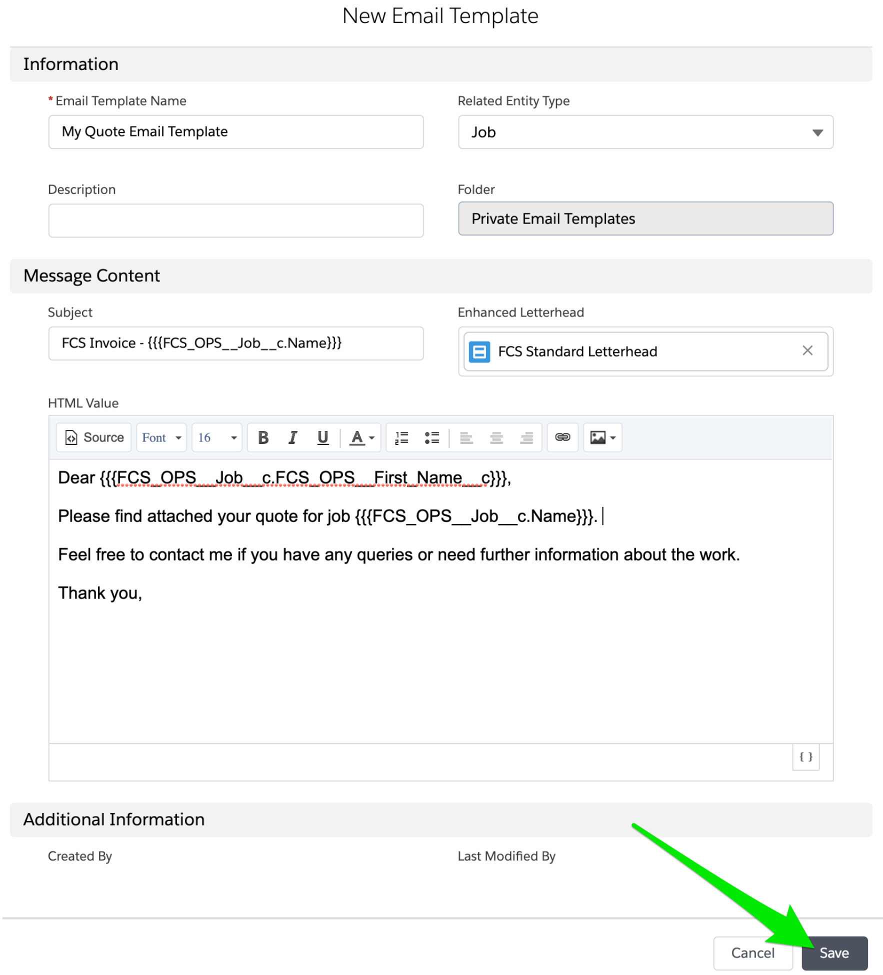
10. Select the Object Reference. Sometimes you might reference yourself (Sender) or your organization (Organization).



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



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



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

Tips

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

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

How to configure Classic Email Templates

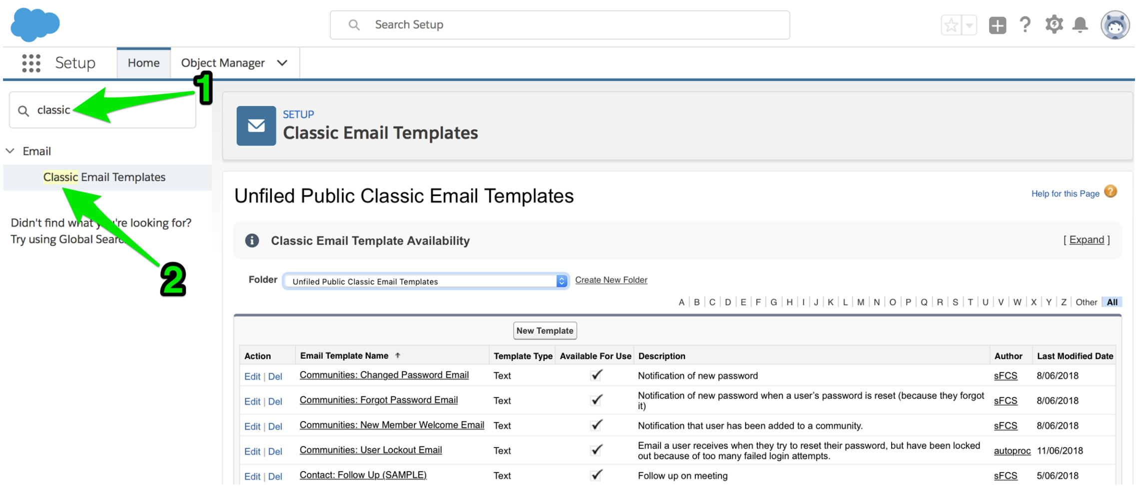
Franchise Recruitment ships with a range of default email templates. These have been configured to customer specification during implementation.

Email templates can be edited in the Setup category of Classic Email Templates.

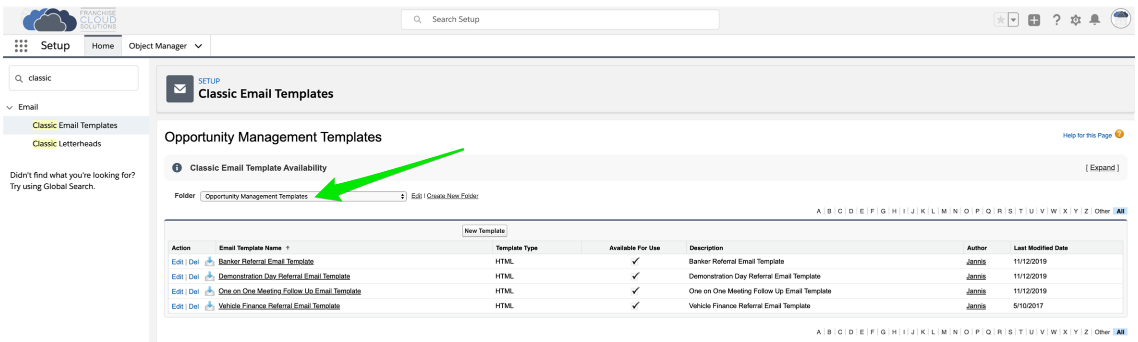
> The example below demonstrates how to access the Opportunity Management Templates and Lead Management Templates. Email templates for other categories can be edited in the same way.

To locate templates for editing

1. Go to **Setup**, and enter for `Classic Email Templates`. Click the resulting link.



2. From the **Folder** list, select either `Opportunity Management Templates` or `Lead Auto Response Templates`.



3. Edit any of the templates by clicking the `Email Template Name` link.

CHAPTER 3

Configuring GSuite and Office 365 Synchronization

Introducing Einstein Activity Capture

Salesforce's Einstein Activity Capture (EAC) provides the ability to synchronize email, contact and task information between Salesforce and

- GSuite (Gmail, Google Calendar)
- Office 365
- Microsoft Exchange

When synchronization is set up:

- emails received into an GSuite, Office 365 or Microsoft Exchange inbox can be automatically associated with a customer Account or Contact
- events within a GSuite, Office 365 or Microsoft Exchange calendar replicated to the user's Salesforce Calendar
- events within the user's Salesforce Calendar replicated to their GSuite, Office 365 or Microsoft Exchange calendar.
- contacts added to an Account in Salesforce can be automatically added to GSuite, Office 365 or Microsoft Exchange account
- contacts within Salesforce can be replicated to GSuite, Office 365 or Microsoft Exchange accounts

These are some powerful capabilities, but there are considerations you need to bear in mind. Before configuring these capabilities, ensure you understand:

- "Considerations for EAC Email Sync" on page 81
- "Considerations for EAC Event and Contact Sync" on page 84

Salesforce App Contact Sync

In addition to Einstein Activity Capture, it is possible to configure capture of contacts on a phone with Salesforce. This may be useful for organizations which issue company phones to ensure that all contacts made on the phones are also stored within Salesforce.

This is done through through the Salesforce app, and requires

- configuring the Salesforce app to capture phone contacts in Setup
- installing the Salesforce app on the phone
- granting permission for the Salesforce app to access contacts on the phone

It is not recommended to implement two forms of contact sync simultaneously, as this is likely to result in duplication.

Considerations for EAC Email Sync

This topic discusses the implications of syncing email from an GMail or Office 365 inbox to Salesforce Accounts or Contacts using Salesforce's Einstein Activity Capture (EAC).

How Salesforce EAC Email Sync works

When an individual who has been granted EAC Email Sync permissions and has agreed to EAC Email Sync occurring, email from their email inbox is captured and transported to a Salesforce Einstein server.

There the Einstein server examines the email to see if there is any Account or Contact related to this email.

> ✓ **How EAC matches emails with Accounts and Contacts**
>
> If a Personal Account has an email address, EAC will match any email to or from this email address with the Account.
>
> If there is no Account match, it will attempt to match against a Contact's email address. This is likely in the case of Business Accounts, which by default have no personal email addresses.
>
> There are other matching strategies, including matching against Opportunities if you're using Franchise Recruitment, but these are the most common.

When the Einstein server makes a match, it stores the email within the Einstein Activity Capture storage.

Any email stored within Einstein Activity Capture will appear within the Activity Panel of one or more Salesforce records. Despite being displayed in the record's Activity Panel, these emails are never actually stored in Salesforce. They are instead stored within Einstein Activity Capture and are only displayed in Salesforce.

All emails stored within EAC are discarded after a period of time. As of the time of writing, free EAC accounts retain email for six months and paid versions retain email for 18 months. Salesforce do not provide an option to retain emails indefinitely.

Considerations for using EAC with Franchise Recruitment

If you are using Franchise Recruitment independently of Operations Management or Business Management, then you need to be mindful that:

- EAC will capture email against related Leads, Contacts, Opportunities and Accounts
- each individual has the choice of allowing captured emails to be seen in Salesforce only by themselves or to be shared with everyone having access to the Salesforce record

- free versions of EAC retain emails for around six months, so this is suitable for relatively brief sales cycles but may not be suitable for extended cycles or repeated sales

If you're also using Operations Management and Business Management, you also need to be mindful of considerations for those applications.

Considerations using EAC with Operations Management

By design, the location intended for storing pertinent business correspondence are a Management Log associated with a particular franchisee. Management Logs are a custom object introduced by Franchise Cloud Solutions.

By design, EAC matches emails only against standard Salesforce objects (e.g. Accounts, Contacts, Opportunities). Salesforce's EAC provides no means to configure matching against custom objects (such as Management Logs or Audits).

> Further, if you have granted franchisees access to the system (whether that be through Business Management, Partner Portal or Mobile licenses) they will be able to view the Franchise Profile Account. If anyone in a head office team are having confidential discussions with or about a franchisee, it is likely that email will be captured and stored on the Franchise Profile Account, which the franchisee has access to. This lack of privacy of confidential information is a significant negative consideration for any Franchise Cloud Solutions customer whose franchisees access Salesforce.
>
> However, you can mitigate this by excluding emails that only involve email participants within specified domains. See the Salesforce documentation for Excluded Addresses.

Emails captured and stored by EAC are also transient. This works against one of the crucial functions of Operations Management, which is to maintain a history of interactions with franchisees across the course of their franchise agreement.

Emails captured and stored by Einstein Activity Capture cannot be reported on by standard Salesforce reports.

For these reasons, we consider it inadvisable to configure EAC for head office users where any franchisee has login access. Those organizations who plan to never allow franchisee access to Salesforce still need to be mindful of the email discard timeframes and consider whether this makes EAC suitable or unsuitable for use.

For those organizations who decide EAC is unsuitable, we do have a recommended alternative.

Recommendation for Operations Management users

We recommend an alternative way of storing Office 365 or Gmail emails in Salesforce. Salesforce offer an extension, available for

- Outlook in Office 365, and
- Gmail when used with the Chrome browser

which provides manual control as to which emails are stored in Salesforce.

This recommendation has practical advantages of

- allowing users to choose which emails are captured
- storing the email directly within Salesforce and thus not subject to being discarded
- being able to report on email stored within Salesforce
- allowing users to file emails against the records of their choice, including and especially within Management Logs

For more information about the Salesforce extension, see topics on the Salesforce extension within the **Franchise Recruitment User Guide**'s ***Customer Communications*** chapter.

Considerations using EAC for Business Management

While Franchise Cloud Solutions recommend franchisees deploy the Salesforce extension to Office 365 or the Chrome Salesforce extension for GSuite, some organizations may still prefer to deploy EAC for users on an EAC Business Management license. If this is the case, the following considerations need to be borne in mind:

- EAC will capture against related Contacts and Accounts, but will not relate an email to a Job
- EAC will store emails only against records that the user has access to, so there is no problem if unrelated franchisees happen to have clients with similar or identical information
- EAC-captured emails are transient, and will automatically disappear after six months (free version) or 18 months (paid version)
- Franchisees can productively share their emails with everyone; if they choose to share only with themselves or without groups, it may be possible that head office employees won't have visibility into those emails

If you're also using EAC for Recruitment or Operations Management, you also need to be mindful of considerations for those applications.

Considerations for EAC Event and Contact Sync

EAC Event Sync is useful for ensuring Salesforce calendar entries also appear on your desktop and mobile phone calendars.

Contact Sync is useful for ensuring incoming calls from clients are identified and answered professionally when answering from a mobile phone.

Unlike EAC Email Sync, Event and Contact syncing creates standard Salesforce records.

If contact sync is set up bi-directionally:

- ensure the sync from Salesforce to the mobile is not going to exceed reasonable volumes
- ensure that the organization has the right to record contacts from the user's mobile phone (e.g. the phone is owned by the company).

It is good practice to ensure Event sync doesn't copy data too far in the past. Going too far in the past will create needless replication of data.

Recommendation

EAC Event and Contact sync can be quite useful even in organizations that choose not to implement EAC Email Sync. In this case, ensure the configuration has the Email Sync switched off while having the Event and Contact Sync settings switched on.

How to configure users for EAC Sync

Users who wish to sync via EAC require appropriate permissions.

To setup users for EAC

- Within Setup > Users, ensure each user has:
  1. **Permission Set Assignments** to include `Standard Einstein Activity Capture`.
  2. **Permission Set License Assignments** to include `Standard Einstein Activity Capture User`.

> Now proceed to configure EAC Sync, *See* "How to configure EAC Sync" on the next page.

To add users to an existing EAC Sync configuration

- Within Setup > Users, ensure each user has:
  1. **Permission Set Assignments** to include `Standard Einstein Activity Capture`.
  2. **Permission Set License Assignments** to include `Standard Einstein Activity Capture User`.
- Within **Einstein Activity Capture Settings** (**Setup** > **Einstein Activity Capture** > **Settings**), edit the **Configuration**.
  1. In the **General Settings** tab, in the section named **User and Profile Assignments**, ensure the user is `Selected`.
  2. Press **Save**.

> **What to expect following configuration**
>
> An hour or so after configuration of users for EAC Sync, configured users will be shown a banner at the top of their Salesforce page inviting them to switch on Einstein Activity Capture. Each user must accept this invitation in order for EAC Sync to be switched on for them.

> **Check status of a user's EAC Sync**
>
> To check whether or not a particular user has enable EAC Sync, check to see whether you can find their user on the **Setup** > ... > **Einstein Activity Capture** > **User Status** page.

How to configure EAC Sync

Starter configuration instructions are provided here. For in-depth documentation refer to Salesforce's own documentation.

Before you begin

Ensure you have completed "How to configure users for EAC Sync" on the previous page prior to starting this procedure.

To configure Einstein Activity Capture for the first time

1. In Setup, search for "activity" and select the **Einstein** → **Einstein Sales** → **Einstein Activity Capture** → **Settings** link.
2. To initiate a connection, select the **Add Contact and Event Sync** button.
3. Choose whether you're using **Google G Suite**, **Microsoft Office 365**, or **Microsoft Exchange**.
4. Choose whether you're going to use **User-Level Auth** (which is what is assumed throughout this manual) or **Service Account** (you'll need to consult Salesforce documentation if you select this option).
5. Name the configuration.
6. Determine whether this configuration will sync any combination of Email, Events, or Contacts.

   Considerations

   Please take into account "Considerations for EAC Email Sync" on page 81 and "Considerations for EAC Event and Contact Sync" on page 84.

7. Complete the wizard. Shift the intended EAC users from **Available** to **Selected**, then finish the wizard.

   For more information

   Refer to the Salesforce Einstein Activity Capture documentation.

CHAPTER 4

Working with Reports

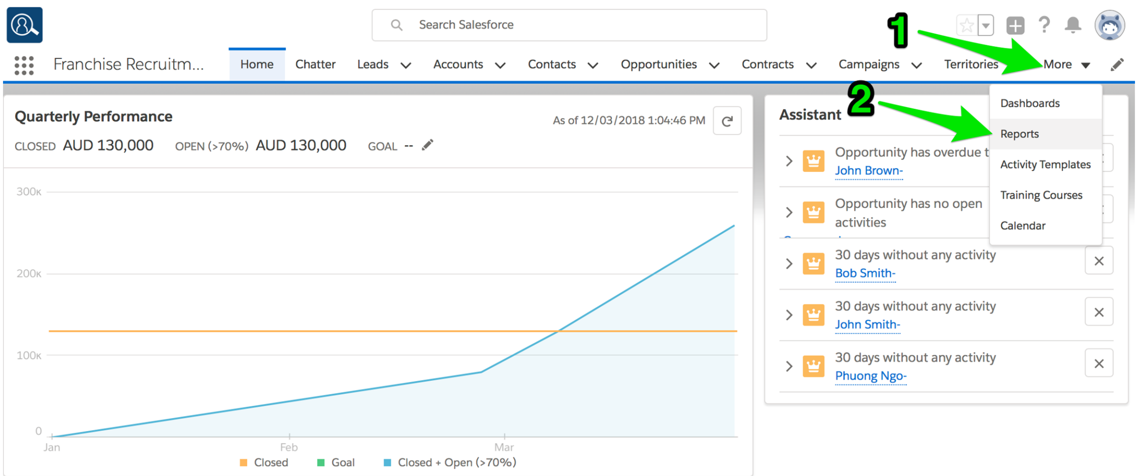
Understanding reports

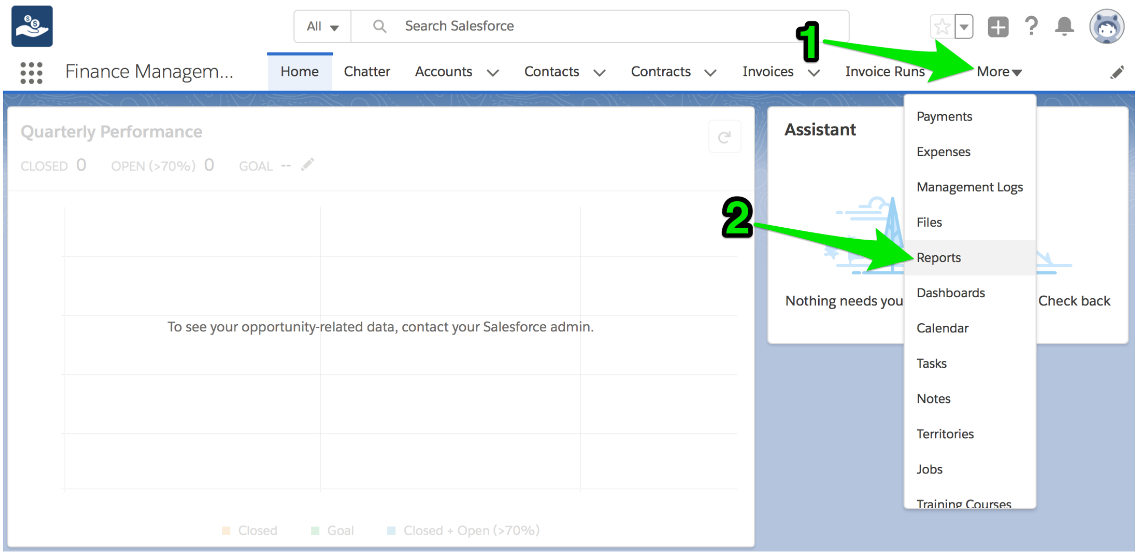
A report provides a summary of your records filtered by specific criteria at a point in time. Reports provide a great way to remain aware of the overall performance of your business.

Franchise Recruitment ships with a range of reports tailored to finance.

To discover available reports

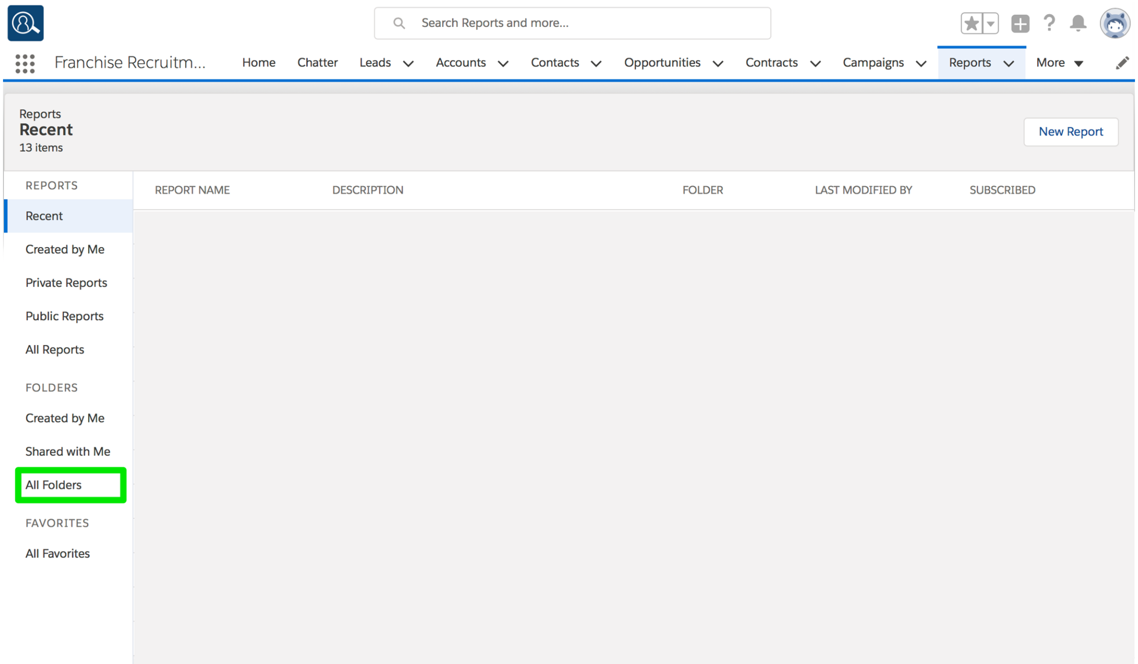
1. From the Salesforce menu, choose **More**, then choose **Reports**.

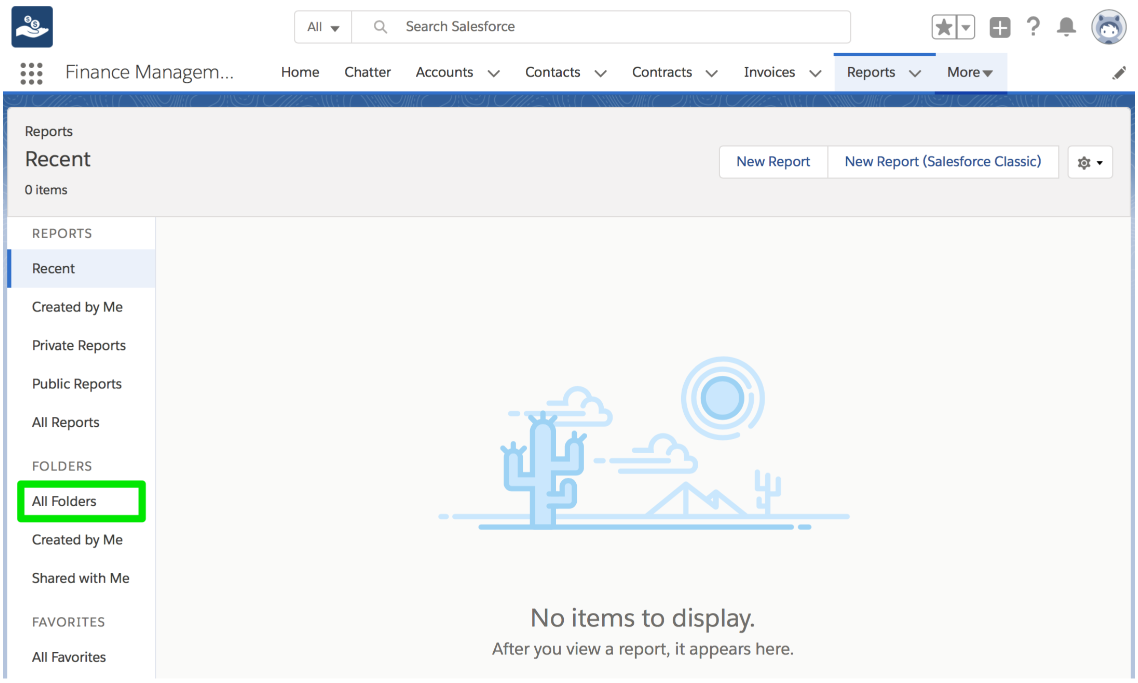




The recent reports folder appears. If you have yet to use a report, this will be blank.

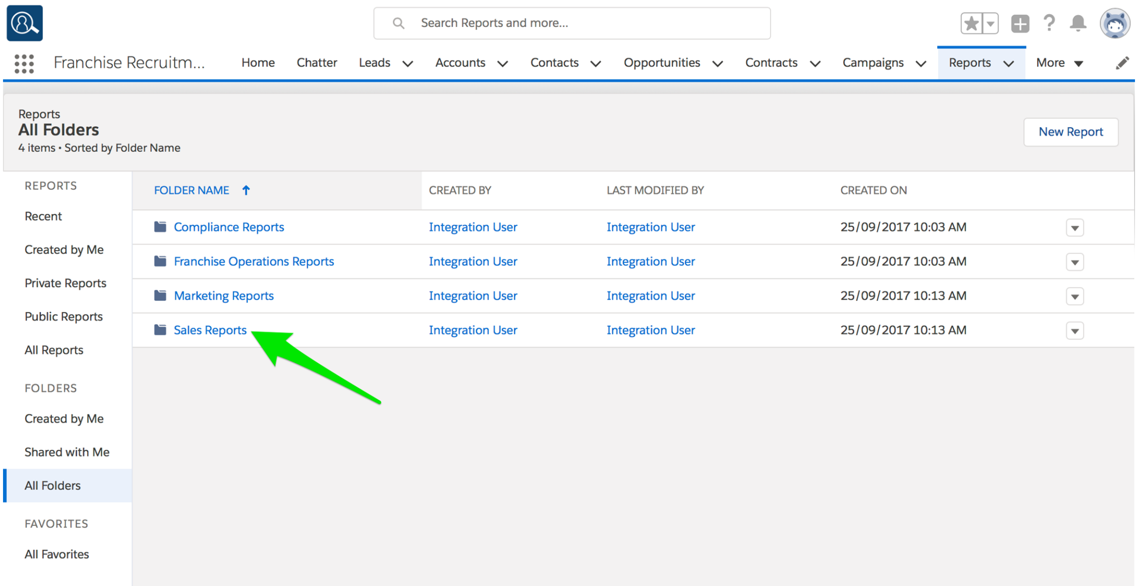
2. To see the different types of reports, go to the **All Folders** folder.

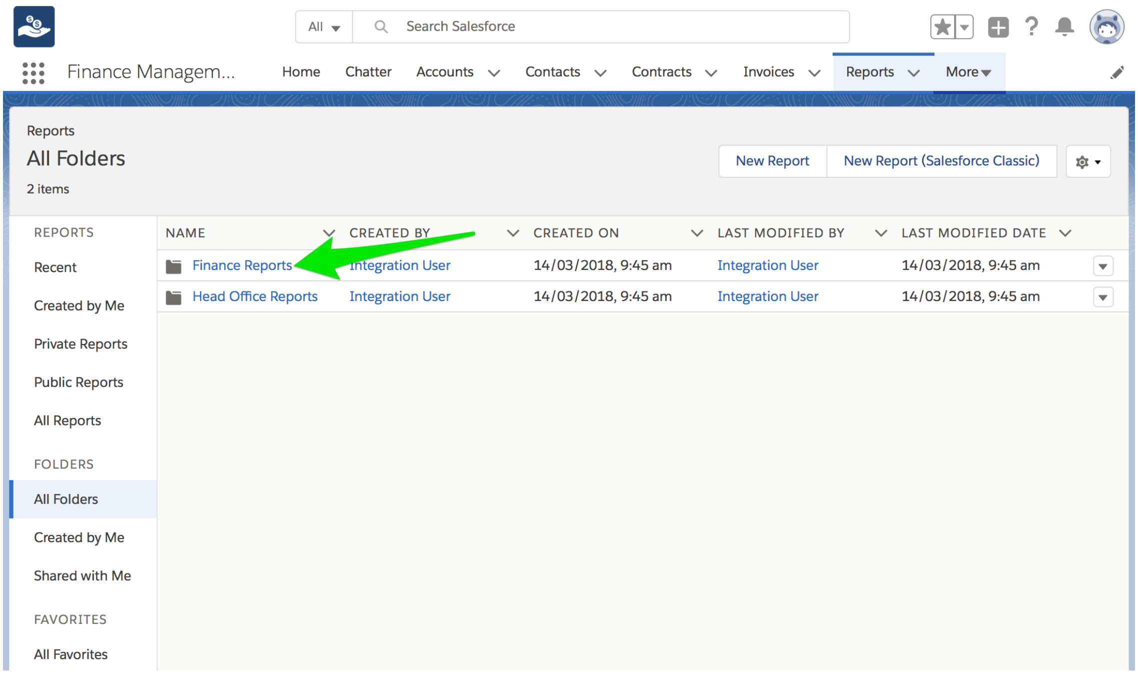




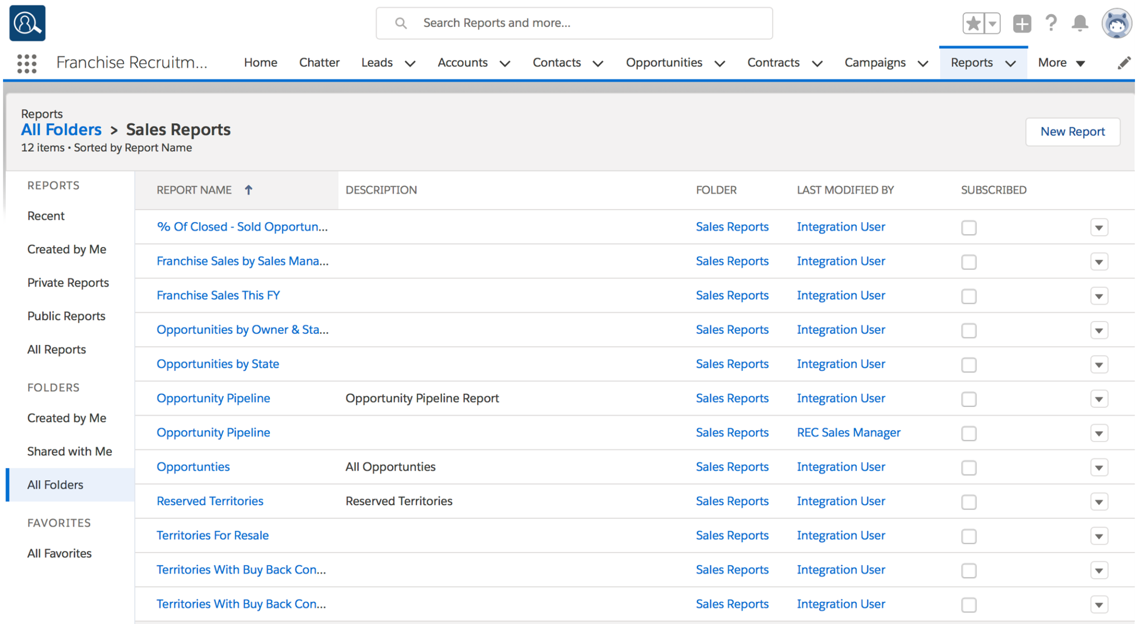
There you will see each of the different categories of report that come with Franchise Recruitment.

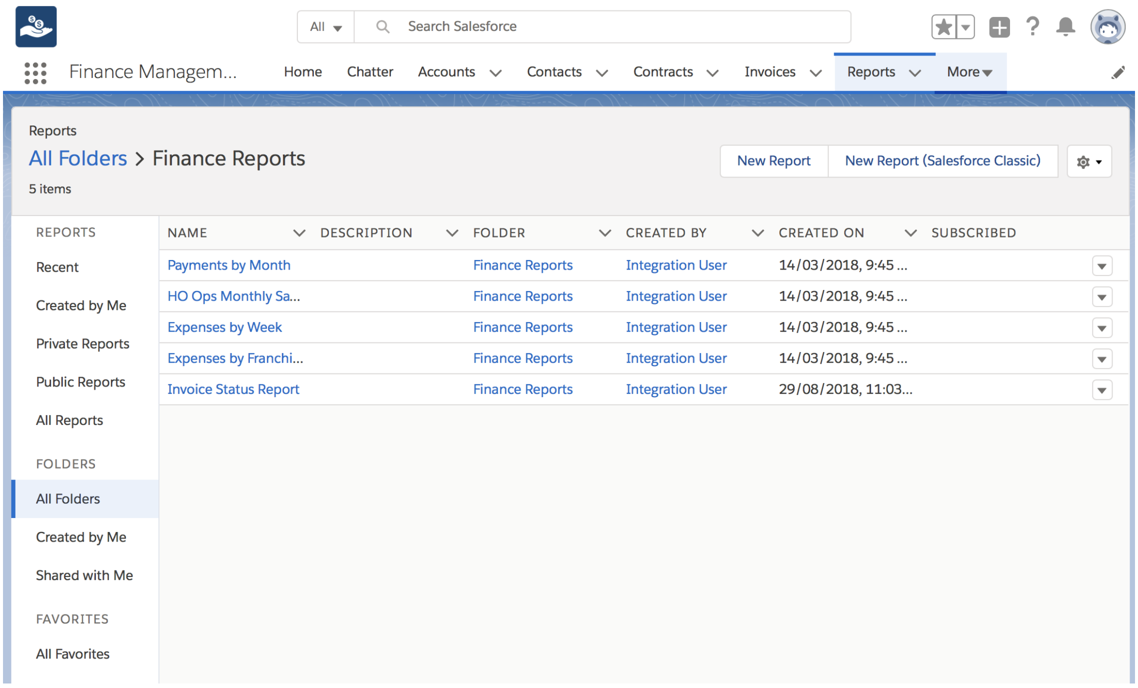
3. Select any one of the report folders.



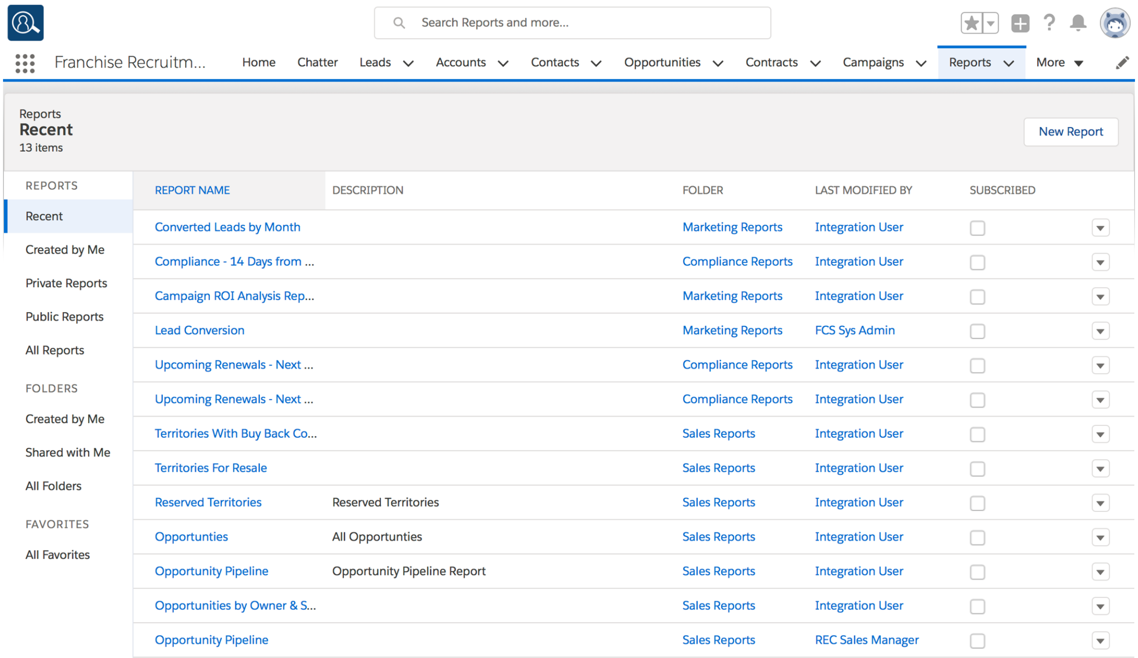


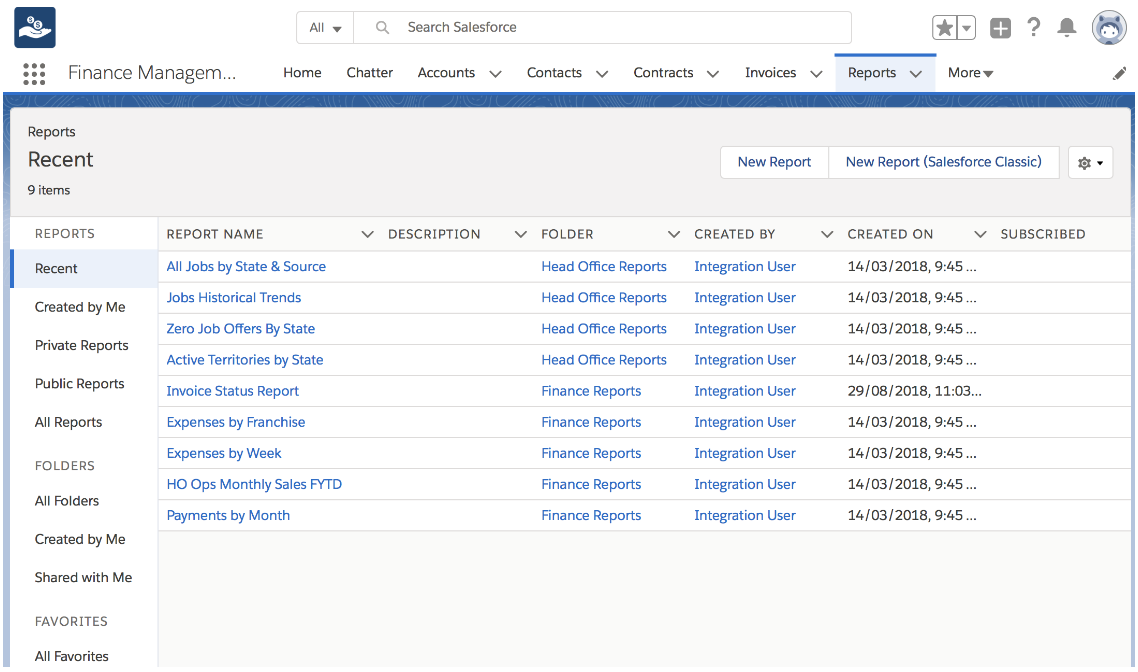
Now you can see the reports within that folder.





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 Franchise Recruitment are summarized below.

Marketing Reports

Report Name	Description
Campaign ROI Analysis	Return on investment by campaign
Converted Leads by Month	Detailed breakdown of leads, opportunity value and forecast close date by month.
Expected Revenue by Campaign	Detailed breakdown of opportunities by campaign.
Expected Revenue by Lead Source	Detailed breakdown of opportunities by lead source.
Lead Conversion	Leads converted vs unconverted
Lead Conversion Ratio by Month	Leads converted vs unconverted by month
Leads by Campaign	Lead name by campaign.
Leads by Source	Lead name by lead source.
Leads Over Time	Lead interest and contact details by month.

Sales Reports

Report Name	Description
% of Closed - Sold Opportunities	Listing of sold opportunities vs opportunities that are not yet sold.
Franchise Sales by Sales Manager	Detailed breakdown of opportunities by sales manager.
Franchise Sales this FY	Probability of franchise sales forecast to close this financial year.
Opportunities	Detailed breakdown of opportunities by status.
Opportunities by Owner and Stage	Detailed breakdown of opportunities by status and by owner.

Report Name	Description
Opportunities by State	Detailed breakdown of opportunities by status and by state.
Opportunity Pipeline	Detailed breakdown of opportunities by status.
Reserved Territories	List of territories flagged as reserved with the quoted price.
Territories for Resale	List of territories flagged as being for resale.
Territories with Buy Back Conditions	List of territories flagged as having buy back conditions.

DocuSign reports

DocuSign is available for custom implementations only.

Report Name	Description
Average Days to Complete	The average days to completion of all DocuSign Envelopes sent.
Average Days to Complete by Sender	The average Days to completion of all DocuSign Envelopes by Sender
Average Hours to Complete	The average hours to completion of all DocuSign Envelopes sent.
Average Hours to Complete by Sender	The average number of minutes to completion and envelope by sender.
Average Minutes to Complete	The average minute to complete all envelopes sent.
Average Minutes to Complete by Sender	The average number of minutes to complete and envelope by sender.
Envelope Events this Month	Total envelope events this month.
Envelope Events this Quarter	Total envelope events this quarter.
Envelope Events YTD	Total envelope events this year to date.
Envelopes by Sender this Month	Total envelopes sent this month by sender.

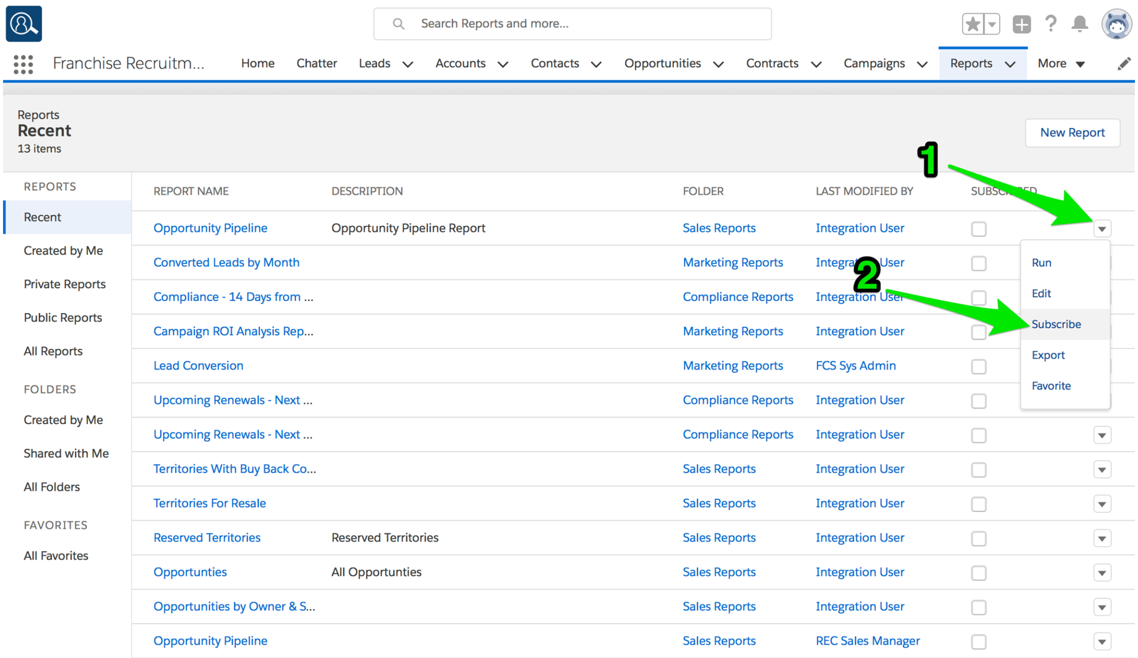
Report Name	Description
Envelopes by Sender this Quarter	Total envelopes sent this quarter by sender.
Envelopes by Sender YTD	Total envelopes sent this year to date by sender.
In Progress Envel- opes	Envelopes sent and not voided, deleted or completed.
In Progress Envel- opes Older than 72 Hours	All envelopes sent and not completed, deleted or voided 72 or more hours ago.
Percent Complete by Sender	The percent of all envelopes sent that are complete by sender.
Top Closers	Senders who have sent the most envelopes that are completed.
Top Senders	Senders with the highest sent envelope counts.

How to run a report

You run a report simply by opening it. Whenever you open a report, the report queries the database for the latest records and displays them in the report.

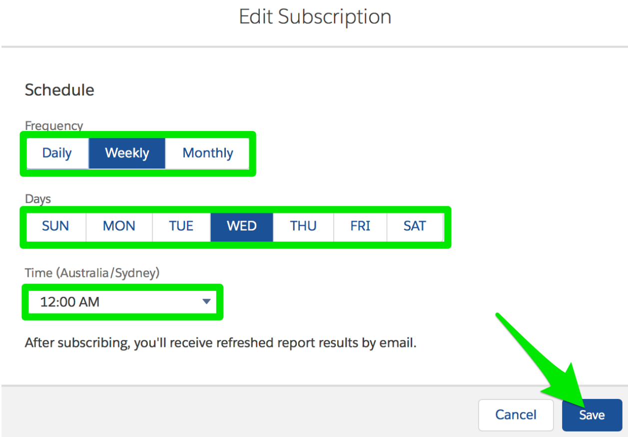
To run a report on a regular schedule

1. From any **Reports** folder, click on the **Show More** button and choose **Subscribe**.

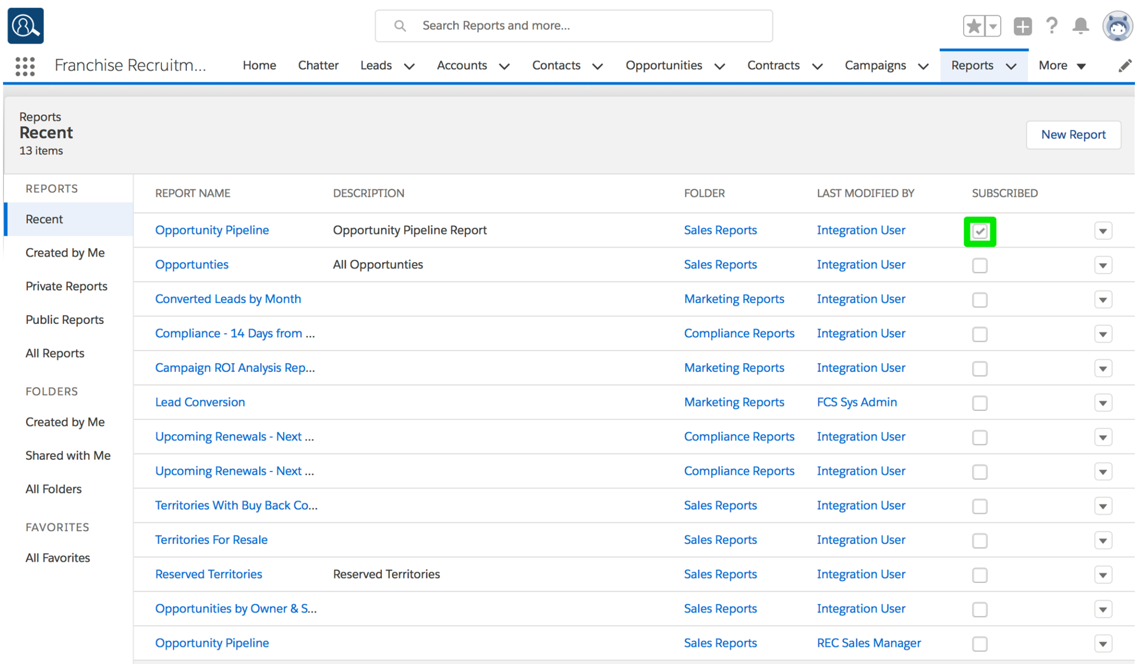


The Edit Subscription dialog box appears.

2. Set the schedule as desired and press **Save**.



The report is now listed as being subscribed.

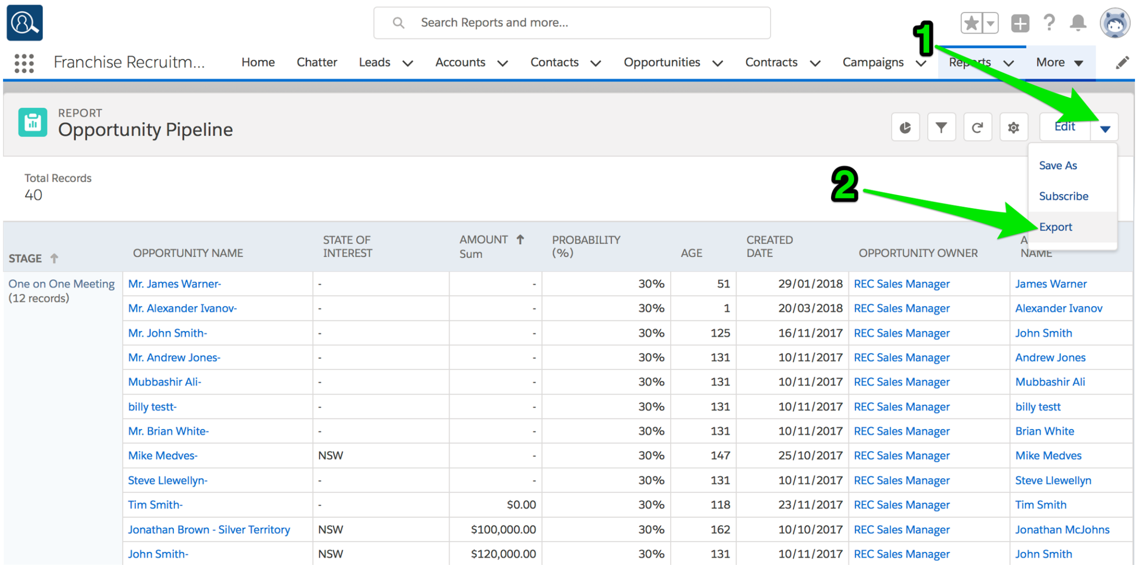


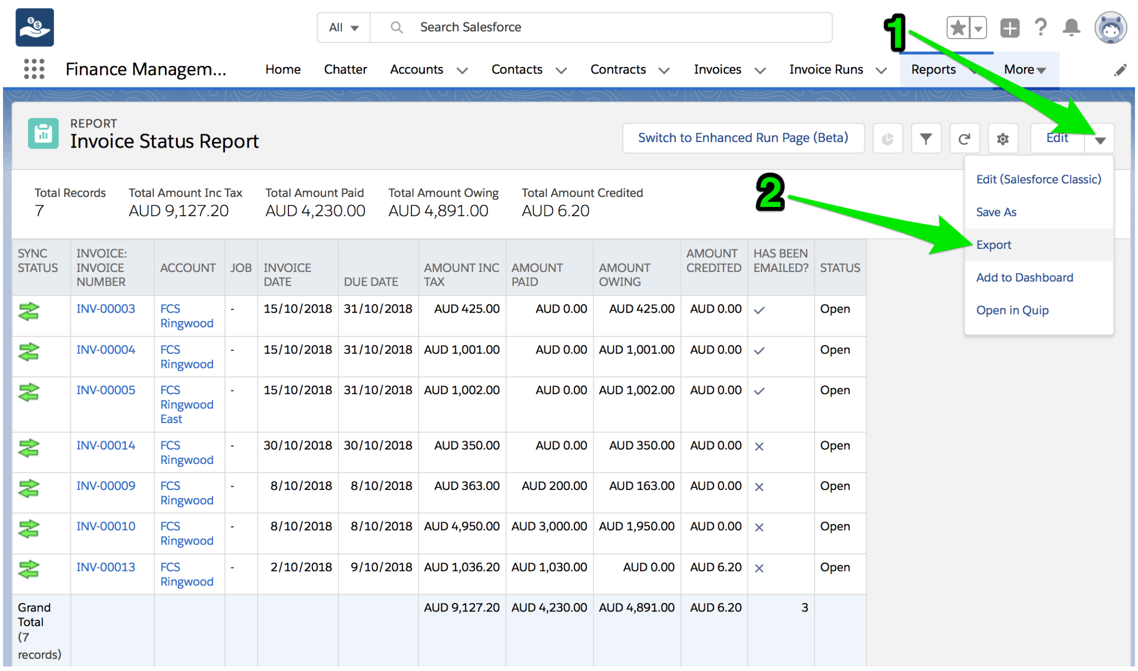
How to export a report

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

To export report results

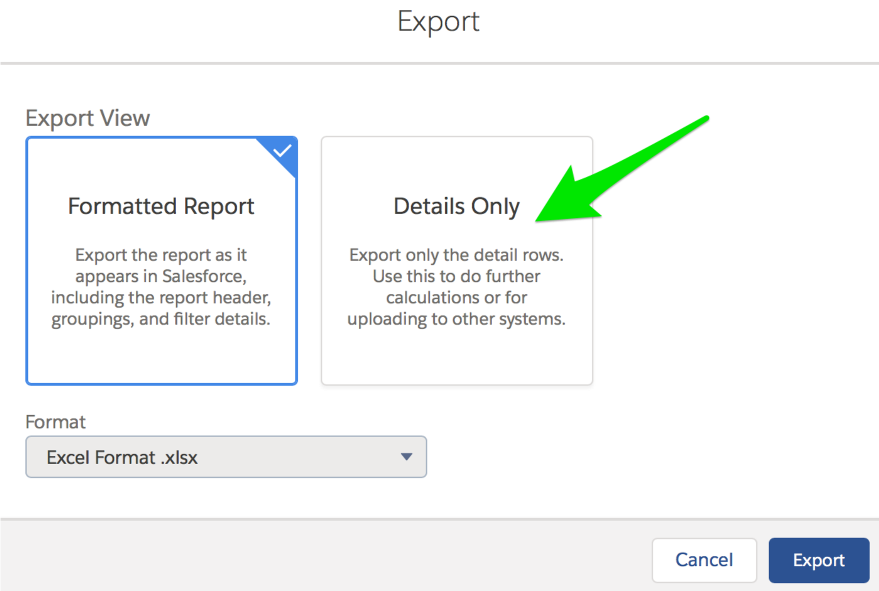
1. From any report, press the **Show more** button then choose **Export**.





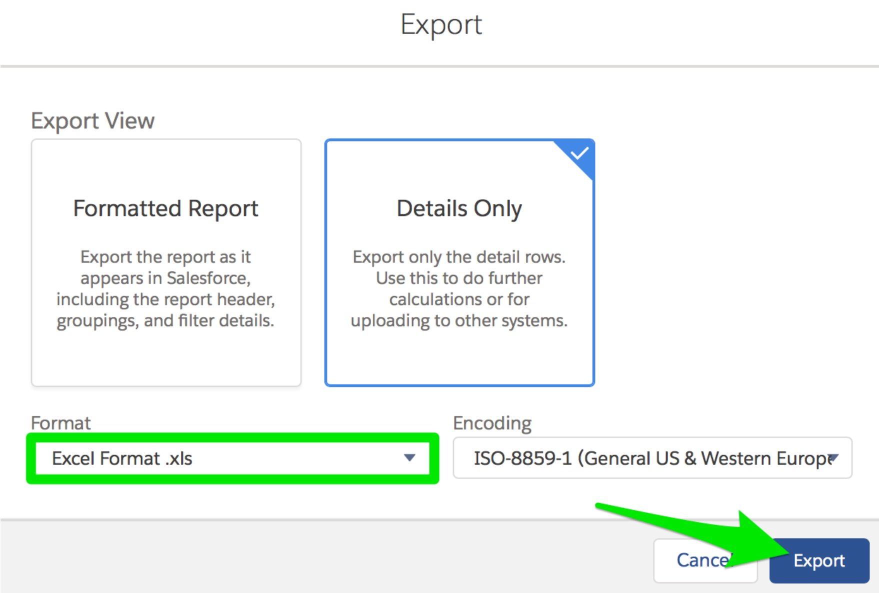
The Export dialog box appears.

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 98.
2. Print it using Excel.

Or,

1. Subscribe to the report, so that it is delivered to your email inbox. *See* "How to run a report" on page 96.
2. Print the PDF.

CHAPTER 4

Accessing Help and Support

Product Documentation

Congratulations for starting along the pathway to accelerate your operations using Franchise Cloud Solutions products. As we move through the implementation journey, you're likely to have questions and need support along the way.

The first port of call should always be our comprehensive video tutorials and user guides.

Knowledge Base

Franchise Cloud Solutions maintains a Knowledge Base covering

» Release Notes
» Tips & Tricks
» Configuration instructions
» Error messages

Customers can access the Knowledge Base at any time.

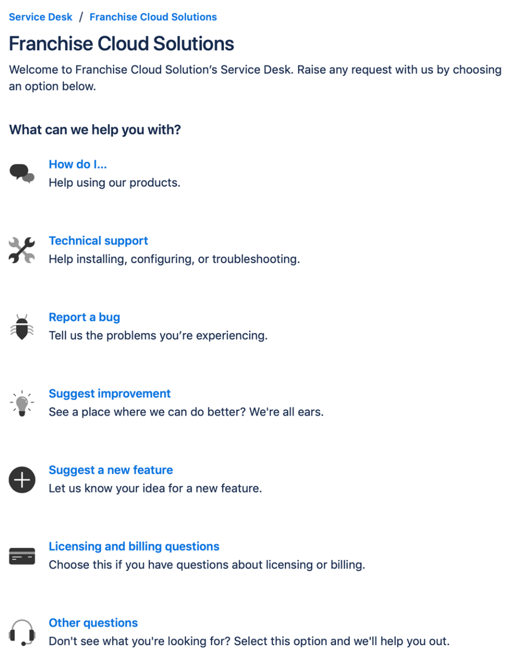
Contacting Customer Support

Customers can access our customer support team between the hours of 8:30 am and 5:30 pm Monday through Friday. Your project manager will add key personnel to our Service Desk to allow them to raise issues and request assistance.

> Customers can also reach our support team by sending email to
> » service@franchisecloudsolutions.com

Raising Service Requests

When you log into the Service Desk, you're shown a list of the types of service requests you can raise with us. We ask you to choose the most appropriate request type so that we can help you most effectively.



From this menu, select the type of request you're wanting to raise. Each type of service request is explained below.

Request Type	Comments
How do I...	We provide comprehensive videos and user guides for all our products. These materials cover all standard and basic procedures. However, there will still be a range of things it doesn't cover, such as site-specific customizations and advanced uses. For these types of requests, we encourage you to ask our support specialists how to do something.

Request Type	Comments
Technical support…	If you are the site administrator and need help configuring the product, we encourage you to reach out to us for assistance with technical support.
Report a bug…	If you see behavior that you believe contradicts the documentation or performs in a manner against your expectations, feel free to report a bug.
Suggest an improvement…	When there is an existing piece of functionality that you believe could be improved, feel free to suggest it here.
Suggest a new feature…	When you would like to the system be extended to cover a new area of functionality, we're keen to receive your input. (We can't always promise that we implement every feature request promptly but we do regularly review customer feature requests and prioritize them based on business need.)
Licensing and billing questions	For questions related to licensing and billing, please complete this type as our licensing specialists can deal with it.
Other questions	For any questions not falling into one of the above-listed categories, feel free to use this request type.

How to Suggest Improvements or Features

We're always keen to better understand how you work and what your needs are. When you request a new feature, we're always keen to understand how you do business today.

We would like to know:

1. Your current business process. What do you do? What are you business rules?
2. How your team members achieve the task today.
3. How you reckon the task could best be achieved in our software.

Most people only tell us #3.

We're always more able to help you if you give us all three pieces of information.

How to Report a Bug

Franchise Cloud Solutions implementations come with a suite of test cases to assist you with UAT. Each UAT case provides a set of steps that you should be able to follow to completion.

If a test fails, then congratulations!, you have just found a bug!

There may be several different reasons for bugs. It might be:

- a browser bug
- a problem with our code
- an issue with test data or templates
- a documentation bug
- an issue with the test suite
- or, perhaps, something else entirely.

Whatever the case may be, reporting it well and in a timely fashion will help us resolve the issue as soon as possible.

What is a useful bug report?

When you do find bugs that need fixing, we're keen to get them resolved as soon as possible. What really helps with this is getting all the information we need to identify the issue.

> Some of this depends on getting high quality information from you.
>
> **Here's how you can help us help you!**

Within our Help Desk, you can see all the service requests that your organization has filed. We'd appreciate it if you'd check that your bug hasn't already been raised.

When you log a bug, please remember to describe only a single bug in a service request. **Feel free to raise as many issues as you need!**

Here are some tips on writing a good bug report.

How to write a good bug report

Write a **Summary** that outlines the bug as best you can describe it.

Within the **Detail** section, we need the following information

1. What happened? What concrete things did you observe?
2. Steps to replicate? List each page, field, data value and button pressed to replicate.
3. What you expected the system to do (if there was no error).
4. The error that you observed.
5. Your browser and operating system.
6. Include a screen shot of the issue. Make sure the screen shot includes the entire window.

Optionally, we would invite you to also characterize the Business Impact according to this scale.

1. Who is affected (franchisees/who in head office)? What proportion of franchisees?
2. Visibility? Estimate of how many times per month (per franchisee/affected party) this issue will be encountered.
3. Blocks? Does this block a process? What process is blocked?

Example Bug Report (minimal)

Summary

Franchisee does not have permission to create a new job from a customer's Accounts page.

Description

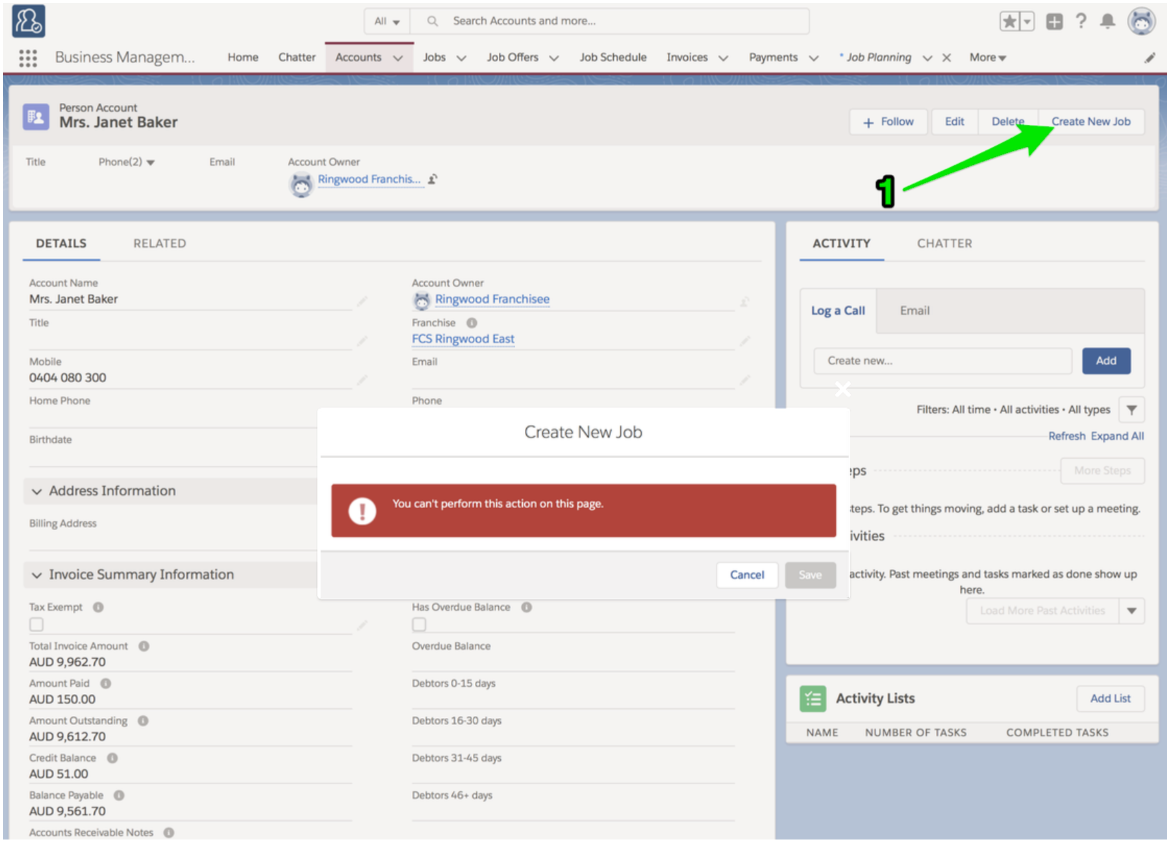
Cannot create new job from a customer's Account page.

To replicate:

1. Log into Business Management as a franchisee.
2. Go to the Accounts tab and select an account.
3. Click the Create New Job button.

EXPECT: A new job to be created.

ACTUAL: Error dialog "Create New Job" displays with the message "You can't perform this action on this page."



Environment

Sandbox.

Google Chrome.

Desktop (Windows 10).

Example Bug Report (technical details)

Summary

Accounts with Financial Integration throw component error on page load

Description

In a Franchise Account already connected to Xero (e.g. HAH Prod: Ringwood East), clicking onto the Account Details screen causes the Account Code Mapping Setup dialog to appear. When it appears, it throws A Component Error exception.

Component error throws in both Chrome and Safari.

I'm logged into Golden UAT as system administrator.

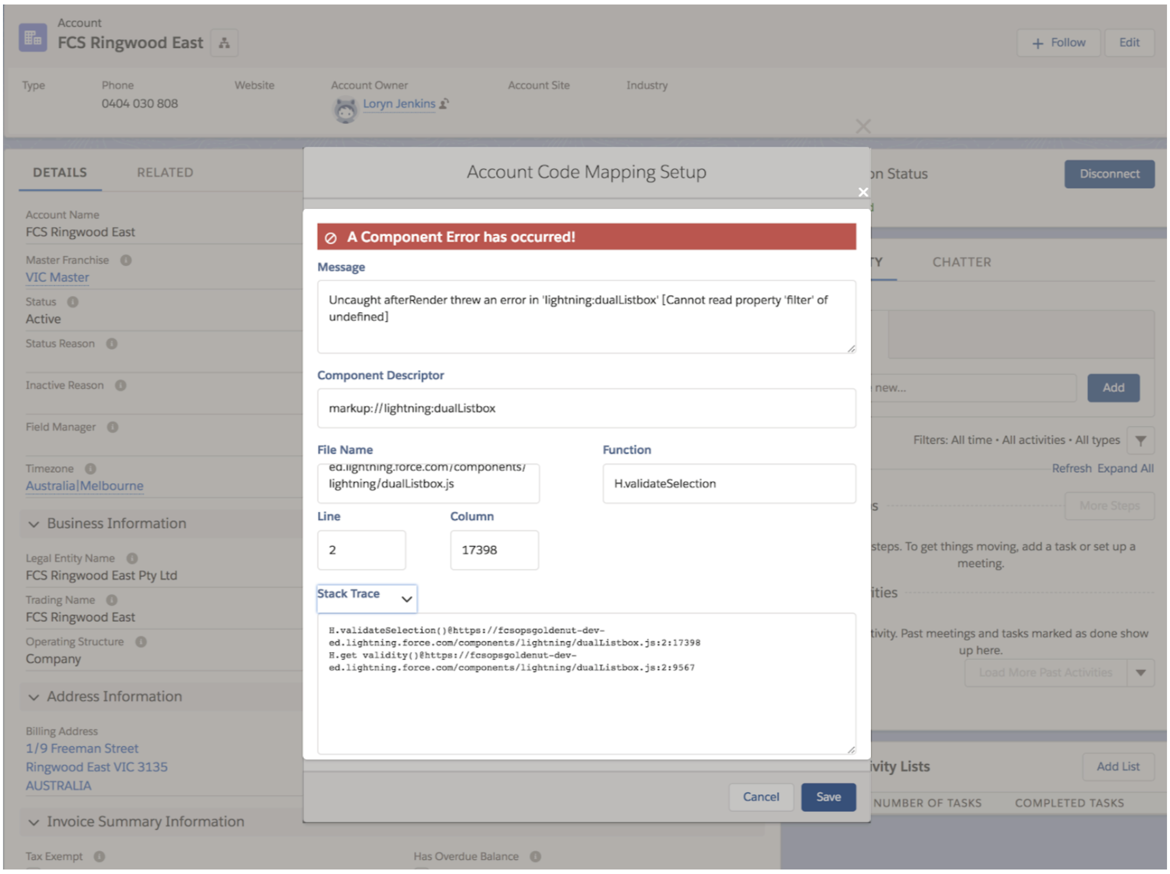
To replicate

1. Go to the Accounts screen.

2. Choose the **FCS Ringwood East** account.

EXPECT: FCS Ringwood East account displays.

ACTUAL: FCS Ringwood East account displays, loads Account Code Mapping Setup dialog, and immediately throws Component Error.



Error details

`Uncaught afterRender threw an error in 'lightning:dualListbox' [Cannot read property 'filter' of undefined]`

`Message`

`markup://lightning:dualListbox`

`Component Descriptor`

`https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js`

`Function`

`H.validateSelection`

`Stack Trace`

`H.validateSelection()@https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js:2:17398`

`H.get validity()@https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js:2:9567`

Environment

Production

Google Chrome OR Safari (BUT NOT Firefox).

MacOS 10.13.

Example Bug Report (medium complexity replication)

Headline

Events on job calendar are clickable only once per instantiation.

Description

You can only cause the Event dialog to appear on an event in the calendar ONCE per instance. After you've used up your one click, you have to reload the calendar in order to cause the Event dialog to re-appear.

To replicate:

1. Open calendar.

2. Click on an event. The **Event** dialog box appears.

3. Click the **Cancel** button.

4. Click again on the same event.

EXPECT: Event dialog to re-appear.

ACTUAL: Event object is not clickable (does not show clickable mouse pointer; clicking on it elicits no response).

Further:

5. Click on another event. The **Event** dialog box appears. (So, it's only the event that was clicked that has become unclickable; not all events on calendar.)

6. Click **Cancel**.

7. Click again on the same event.

EXPECT 1: Event dialog to re-appear.

EXPECT 2: Event object unclickable.

ACTUAL: Event object is not clickable.

Environment

Safari & Chrome

Mac OS 10.12

Business Impact

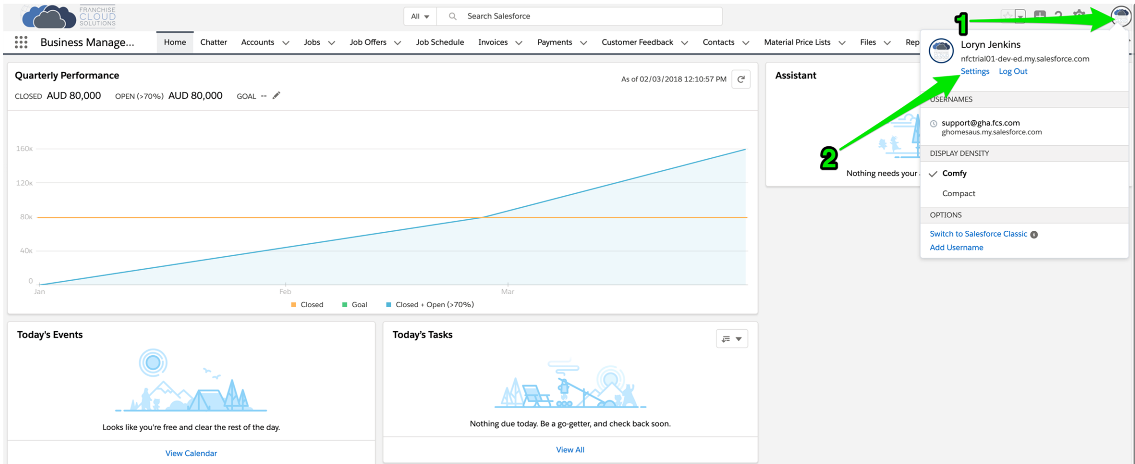
- Who affected: All franchisees, Users of Job Calendar.
- Visibility: 40 times per month per franchisee.
- Block: None.

Granting Account Login Access

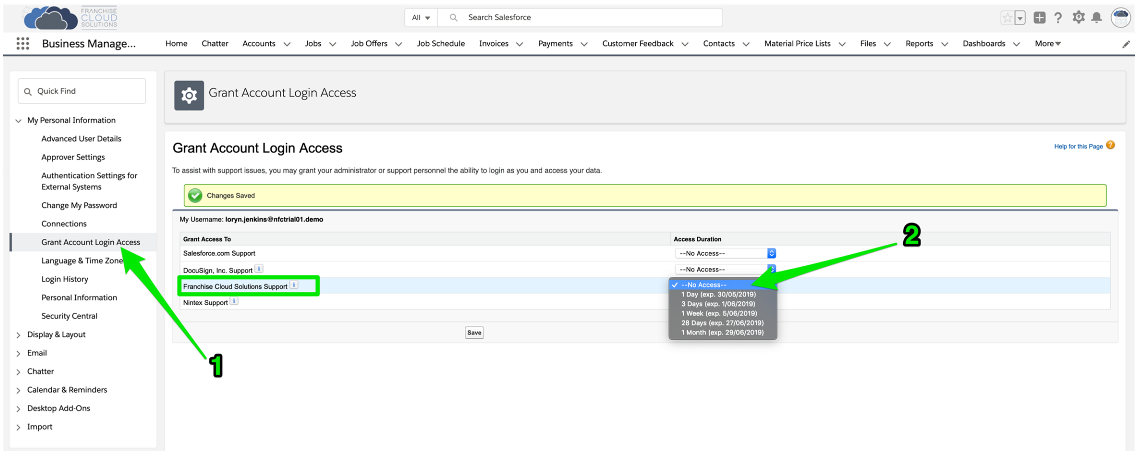
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

To provide our customer support team access to your system

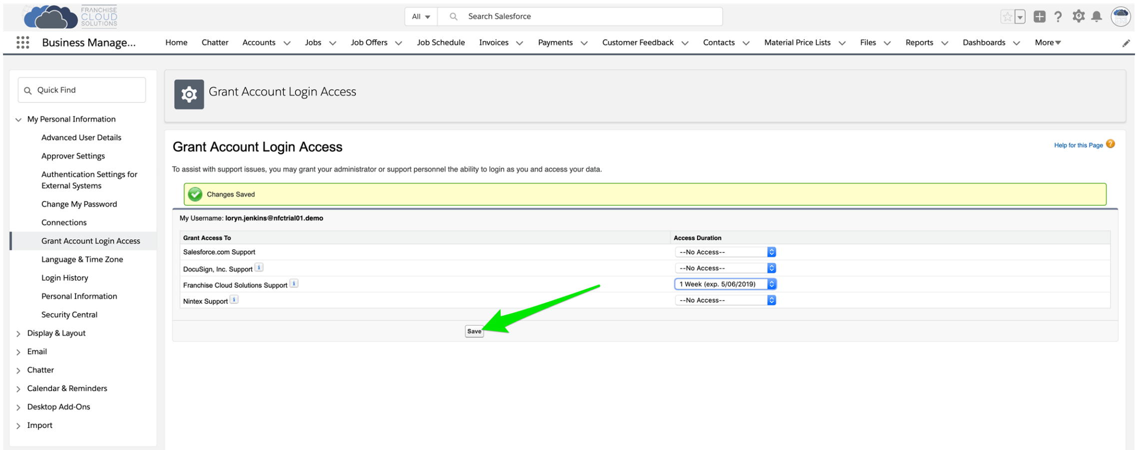
1. Select your account **Settings**.



2. Select the **Grant Account Login Access** page. Then select an appropriate **Access Duration** from the **Franchise Cloud Solutions Support** user.



3. Press **Save**. Our support team will be able to access the system during the period of time you have granted.



You can revoke access at any time.