

# Franchise Recruitment User Guide

version 1.13



### Franchise Recruiter version 1.26

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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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# Where to start

Franchise Recruitment 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 Franchise Recruitment. 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, <u>Get Started with Salesforce</u>.



# How Salesforce organizes information

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

All leads are stored in the list of **Leads**. All opportunities are stored in the list of **Opportunities**, etc.

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.

8			Q Se	arch Leads and mo	ore					5 û i	
***	Franchise Recruitm Home	Chatter	Leads 🗸	Accounts 🗸	Contacts 🗸	Opportunities 🗸	Contracts 🗸	Campaigns 🥆	<ul> <li>Territories</li> </ul>	∽ More	•
_	_				× 1						
2		All 🔻	Sea	rch Invoices and	d more	A				? 🌲	6
•••	Finance Managem	Home	Chatter	Invoices 🗸	Payments	<ul> <li>Expenses</li> </ul>	∨ Managen	nent Logs 🗸 🗸	Files 🗸	More 🔻	ø

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. 🔄 🖬 ? 🐥 🐻 8 Q. Search Salesforce Franchise Recruitm... Home Chatter Leads 🗸 Accounts 🗸 Contacts 🗸 Opportunities 🗸 Contracts 🗸 Campaigns 🗸 Territories Dashboards Assistant Quarterly Performance As of 12/03/2018 1:04:46 PM Reports CLOSED AUD 130,000 OPEN (>70%) AUD 130,000 GOAL -- 🖋 > Opportunity has overdue t John Brown-> Opportunity has no open Training Courses Calendar > 10 days without any activity Bob SmithThere are likely more menus than can fit on your screen. You can find the rest of the menus under the **More** link.



# Overview

Franchise Recruitment 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 Franchise Recruitment are illustrated below, and described in the following table.



Record	Description
Lead	Captures people's interest in the purchase of a franchise or in becoming an employee. Structures the lead qualification process into multiple statuses and records the current status. When qualified, Leads are con- verted into a Sale Account with its related Opportunity, Contract and Contact records.
Sale Account	Owner of the Opportunity, Contract and Contact.
Opportunity	Structures the nurturing and development of the opportunity into mul- tiple statuses and records the current status. Provides access to sales resources of Price Book, Products, Territories and the One on One Meeting record. Also provides access to productivity enhancing facilities such as emails, email templates, tasks, appointments and call notes.
Contract	Captures all contract details and generates mandatory compliance information. Tracks and enforces Franchising Code of Conduct require- ments surrounding the generation and signing of the contract. Once the contract is signed, provides the means to generate the Franchise Profile Account.
Contact	Records the personal contact details of the potential franchisee.

Record	Description
Franchise Profile Account	Generated from the Contract, the Franchise Profile Account becomes the key record representing the franchise. This record can be trans- ferred to the Operations Management product if your organization has licensed it.

# 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.

8	Q Search Leads and more	*• 🖬 ? 🌣 单 🐻
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Contracts V Campai	gns 🗸 Territories 🗸 More 🔻 🖋
Leads Recently Viewed 0 Items · Updated 11 minutes ago NAME  V MOBILE  V EMAI	New	Import Add to Campaign
	You haven't viewed any leads recently. Try switching list views.	
All	Q Search Contacts and more ter Accounts V Contacts V Invoices V Invoice Runs V	★ 💌 🗈 ? 🌲 🐻 Payments 🗸 More 🕶 🖌
Contacts Recently Viewed 0 items - Updated a few seconds ago	Q Search this list	New Send List Email
NAME V ACCOUNT N	ame ∨ account site ∨ phone ∨ email	✓ CONTACT OWNER ✓
	You haven't viewed any contacts recently. Try switching list views.	

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**.

8	Q Search Leads and more		★ 🕶 🔋 🕸 🌲 🐻
Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸 Contacts	✓ Opportunities ✓ Contracts ✓ Ca	mpaigns 🗸 Territories 🗸 More 🔻 🖋
Leads         Recently Viewed         0 items         Q         RECENT LIST VIEWS         ✓         Recently Viewed         All OHER LISTS         All Open Employment Candidate Leads         All Open Franchise Sale Leads         All Open Leads		E Y POSITION Y AREA OF IN Y ads recently. riews.	New     Import     Add to Campaign       ♥・Ⅲ・C     ●       OWNER ALL ∨     CREATED D ∨
All Finance Managem Home Cha Contacts Recently Viewed	Q Search Contacts and more  tter Accounts      Contacts	Contracts V Invoices V Invoice Run:	★▼     ●     ?     ▲     (5)       s ∨     Payments ∨     More ▼     ✓       New     Send List Email
1 item • LIST VIEWS All Business Contacts All Contacts All Franchise Contacts Birthdays This Month My Contacts New Last Week		Q. Search this list HONE ∨ EMAIL	æ         • •

"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."

<b>®</b>	Q Search Leads and more		** 🖪 ? 🌣 🜲 🐻
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts	✓ Opportunities ✓ Contracts ✓ Ca	mpaigns 🗸 Territories 🗸 More 🔻 🖋
Leads Recently Viewed ▼ 0 items		E Y POSITION Y AREA OF IN Y Pads recently. riews.	New Import Add to Campaign V Add to Campaign V Very Created D V
Finance Managem Home Chat	Q Search Contacts and more er Accounts      Contacts	Contracts V Invoices V Invoice Run	★▼     ●     ?     ▲     ●       s ∨     Payments ∨     More ▼     ✓
LIST VIEWS		Q Search this list	\$ • Ⅲ • C I © ▼
All Business Contacts		-IONE V EMAIL	✓ CONTACT OW ✓
All Contacts			
All Franchise Contacts			
Birthdays This Month			
My Contacts			
New Last Week			
Recently Viewerd			
Recently Viewed Contacts			

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.

8		Q Search Leads and more	e				? 尊真	6
	Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸	Contacts 🗸 Opportuni	ties 🗸 Contracts 🗸	<ul> <li>Campaigns</li> </ul>	s 🗸 Territorie	es 🗸 More	•
<b>5</b> 0+ ite	Leads All Open Leads 🔻 ems • Sorted by Name • Filtered by Lead Status • Updated a fe	w seconds ago			New	Import Add	d to Campaign	<b>•</b>
	□ NAME ↑ ∨ STATE/P ∨ MOBILE ∨	EMAIL V LEAD ST	✓ CURREN ✓ POSITI	ON ✓ AREA O ✓	CREATE 🗸	owner 🗸	UNREAD 🗸	
1	Anthony And QLD 0424463511	dean.llewell New	Novak Pty Ltd Tradesr	nan Buy a Franc	5/09/2017	rsale		•
2	Arthur Green QLD 0424463511	In Progress	Jims Mowing Tradesr	nan Buy a Franc	5/07/2017	rsale		•
3	Bevan Ward NSW 0424463511	Contacted	Jones Servi Tradesr	nan Buy a Franc	5/04/2017	rsale		•
4	Carl Baker NSW 0424463511	In Progress	City Repairs Tradesr	nan Buy a Franc	5/07/2017	rsale	<b>~</b>	•
5	Christopher NSW 0424463511	Contacted	City Repairs Tradesr	nan Buy a Franc	5/09/2017	rsale	<b>~</b>	•
6	Daniel Walker NSW 0424463511	In Progress	Jims Mowing Tradesr	nan Buy a Franc	5/09/2017	rsale	<b>~</b>	•
7	David Martin NSW 0424463511	New	Novak Pty Ltd Tradesr	nan Buy a Franc	5/10/2017	rmark	<b>~</b>	•
8	David Smith NSW 0424463511	Contacted	Miller Electr Tradesr	nan Buy a Franc	5/08/2017	rsale		•
9	Dean Walker NSW 0424463511	In Progress	Jims Mowing Tradesr	nan Buy a Franc	5/08/2017	smana	<b>V</b>	•
10	Edward John NSW 0424463511	New	Andersons Tradesr	nan Buy a Franc	5/09/2017	rsale	<b>v</b>	•
	All Q Search Contacts and more     Image: Contacts     Contacts     Contacts   Contacts    Contacts   Contacts    Contacts   Contacts    New   Send List Email							
2 ite	ems • Sorted by Name • Filtered by all contacts - Contact F	Record Type • Updated a few seco	onds ago	Search this list		\$• III•	C / C	<b>T</b>
	NAME↑ ✓ ACC	OUNT NAME 🗸 🗸	PHONE	✓ EMAIL	✓ TITLE	✓ CONT.	ACT OW 🗸	
1	Ringwood East FCS	Ringwood East	0404 030 808			fmanv		
2	Ringwood Franchisee FCS	Ringwood	0404 303 808			Ц		

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.

8			Q Search Leads and m	nore		★• 🖬 ? 🌣 4	1 🐻
	Franchise Recruitm	Home Chatter	Leads 🗸 Accounts 🗸	Contacts 🗸 Opportunities	✓ Contracts ✓ Campaign	s 🗸 Territories 🗸 More	- /
×	Leads All Open Leads 🔻				New	Import Add to Campaign	-
63 ite	ms • Sorted by Name • Filtered by	Lead Status • Updated a fe	w seconds ago			\$ • III • C' 💉 C	•
	NAME 🕇 🗸 STAT	e/p 🗸 Mobile 🔍	✓ EMAIL ✓ LEAD ST	V CURREN V POSITION	🗸 AREA O 🗸 CREATE 🗸	OWNER V UNREAD V	
1	Anthony And QLD	0424463511	dean.llewell New	Novak Pty Ltd Tradesman	Buy a Franc 5/09/2017	rsale	•
2	Arthur Green QLD	0424463511	In Progres	ss Jims Mowing Tradesman	Buy a Franc 5/07/2017	rsale	•
3	Bevan Ward NSW	0424463511	Contacted	d Jones Servi Tradesman	Buy a Franc 5/04/2017	rsale	•
4	Carl Baker NSW	0424463511	In Progres	ss City Repairs Tradesman	Buy a Franc 5/07/2017	rsale 🗸	•
5	Christopher NSW	0424463511	Contacted	d City Repairs Tradesman	Buy a Franc 5/09/2017	rsale 🖌	•
6	Daniel Walker NSW	0424463511	In Progres	ss Jims Mowing Tradesman	Buy a Franc 5/09/2017	rsale 🗹	
7	David Martin NSW	0424463511	New	Novak Pty Ltd Tradesman	Buy a Franc 5/10/2017	rmark 🖌	•
8	David Smith NSW	0424463511	Contacted	d Miller Electr Tradesman	Buy a Franc 5/08/2017	rsale	•
9	Dean Walker NSW	0424463511	In Progres	ss Jims Mowing Tradesman	Buy a Franc 5/08/2017	smana 🖌	•
10	Edward John NSW	0424463511	New	Andersons Tradesman	Buy a Franc 5/09/2017	rsale 🖌	•
2	3	All	Q Search Contacts	and more		★- ₽ ? ♣	6
***	Finance Managem	. Home Chat	Accounts 🗸 Cont	tacts 🗸 Contracts 🗸 Inve	oices 🗸 🛛 Invoice Runs 🗸	Payments 🗸 More 💌	
2 ite	Contacts       New       Send List Email         All Franchise Contacts ▼       Items - Sorted by Name - Filtered by all contacts - Contact Record Type - Updated a few seconds ago       Q. Search this list       Q. Y       Q. Y						
	NAME 1	V ACC	OUNT NAME 🗸 🗸	✓ PHONE ✓	EMAIL 🗸 TITLE	V CONTACT OW V	
1	Ringwood East	FCS	Ringwood East	0404 030 808		fmanv	
2	Ringwood Franchise	e FCS	Ringwood	0404 303 808		U	

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

6. Now come back to the original tab.

8		Q Search Leads and more	★ 🖬 ? 🌣 🌲 🐻		
Fr	ranchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Contracts	🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋		
O items ·	eads Recently Viewed  Updated a few seconds ago NAME  V MOBILE  V EMAI	L 🗸 LEAD STATUS 🗸 CURRENT E 🗸 POSITION 🗸 AREA OF	New     Import     Add to Campaign       R •     III     C'     III		
		You haven't viewed any leads recently. Try switching list views.			
<b>*</b>	All Finance Managem Home Chat		ice Runs v Payments v More v 💉		
0 items	Contacts Recently Viewed ▼ • Updated a few seconds ago	Q. Search this list	New Send List Email		
	NAME V ACCOUNT N	IME 🗸 ACCOUNT SITE 🧹 PHONE 🤍 EMAIL	V CONTACT OWNER V		
	You haven't viewed any contacts recently. Try switching list views.				

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, Franchise Recruitment 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
	Franchise Sales Queue	Where to find newly created leads for potential pur- chasers of franchises. When the lead is assigned to a sales representative it is removed from this queue. <i>See</i> "Capture and confirm leads" on page 51.
Loodo	Employment Candidate Queue	Where to find newly created leads for potential employ- ees. You will need to determine your internal process for working with potential employees within this queue.
Leaus	All Open Franchise Sales Leads	All franchise sales leads that are currently open. You can use this view to see who is currently working on what leads.
	All Open Employment Candidate Leads	All employment candidate leads that are currently open.
	All Activated Contracts	Contracts that are activated.
	All Draft Con- tracts	Contracts that are draft.
Contracts	Expiring Con- tracts	Contracts that are expiring in the next seven months.
	My Activated Contracts	Contracts owned by you that are activated.
	My Draft Con- tracts	Contracts owned by you that are draft.

Record type	List Name	Description
	Franchise Pro- file Accounts	Accounts for operating franchise businesses. This is a list of accounts that is visible in Franchise Operations. <i>See</i> "How to create a franchise profile account" on page 135.
	Master Franchise Pro- file Accounts	Accounts for master franchisor businesses. Generally created during implementation or by an administrator.
Accounts	Franchise Sales Accounts	Accounts relating to franchise sales. These accounts are visible only within Franchise Recruitment.
	Employment Candidate Accounts	An infrequently used account type. Used as a destination for Opportunities whose inquirer is better suited as an employment candidate. <i>See</i> "When a franchise oppor- tunity turns out to be an employment candidate" on page 142.

### How to set a default list view

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

When you select the Leads tab, the only leads you see on the Recently Viewed list are the ones you have already visited. For some job roles, it is more important to see the incoming leads rather than the ones that have already been visited.

By following the procedure below, you will be able to set the Leads tab to always show you the new leads that ready for processing.

To set a default list view

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



2. Press the pin.

~	All 🔻 🔍 S	Gearch Accounts and more		★ 🖬 ? 🖡	6
Finance Managem Hor	me Chatter Accounts 🗸	Contacts 🗸 Contracts 🗸	🗸 Invoices 🗸 Payments 🗸	Expenses ∨ More▼	
Accounts My Accounts 1 item · Sorted by Account Name · Filtered by m	y accounts • Updated a few second	is ago	Q Search this list	New Discover Compa	nies T
ACCOUNT NAME 1	✓ BILLING STATE/PROV	INCE V PHONE	∨ түре	$\sim$ account owner alias $\sim$	
1 FCS AUSTRALIA	NSW	02 9503 0500		OHOM	
Franchise Recruit         Hor	All V Q S	Search Leads and more Accounts V Contacts V	Opportunities V Contracts V	Campaigns v Territories v More	6
Leads Today's Leads V			Q. Search this list	New Import Change Status	Y
I item • Sorted by Name • Hitered by all leads • C	reated Date • Opdated a few seco	nos ago			
1 David Gover	VIC dg@	egmail.com New	27/02/2019 3:01 PM	Franchise Sales Queue	

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

2		All 👻	Q Search Accounts and more		* -	🖬 ? 🐥 🐻
***	Finance Managem	Home Chatter Accou	ints 🗸 Contacts 🗸 Contracts	∽ Invoices ∽ Payments ∽ E	Expenses ∨ More▼	1
1 item	Accounts My Accounts	d by my accounts • Updated a m	nute ago	Q. Search this list	New C	oiscover Companies
	ACCOUNT NAME 1	✓ BILLING STATE	/PROVINCE V PHONE	∨ түре	✓ ACCOUNT OWN	ER ALIAS 🗸
1	FCS AUSTRALIA	NSW	02 9503 0500		ОНОМ	
®. ::::	Franchise Recruit	All v Home Chatter Leads	<ul> <li>Q Search Leads and more</li> <li>Accounts V Contacts V</li> </ul>	Opportunities V Contracts V	Campaigns V Territorie	■ ? ♣ 🐻 s ∨ More▼ 🖌
1 iter	Leads Today's Leads <b>Today's</b> Leads <b>Today's</b> Leads	eads - Created Date • Updated a	ninute ago	Q. Search this list	New Import	Change Status
		COMPANY 🗸 STATE/P	✓ EMAIL ✓ LEAD ST	✓ CREATED DATE ✓ OV	WNER ALIAS $\checkmark$	UNREAD 🗸
1	David Gover	VIC	dg@gmail.com New	27/02/2019 3:01 PM Fra	anchise Sales Queue	✓ ▼

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

### How to customize a list view

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

Imagine you are a new sales representative working out of Melbourne. The list view named **All Open Leads** shows a lot of leads from New South Wales, and you only want to see ones from Victoria. You could create a list view to show **Victorian Open Leads**.

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.

8.			Q Sear	ch Leads and mo	ore				* -	🗄 ? 🐥 🧒
	Franchise Recruitm H	lome Chatter	Leads 🗸 A	ccounts 🗸 🤇	Contacts 🗸	Opportunities	<ul> <li>Contracts</li> </ul>	<ul> <li>Campaigns</li> </ul>	s 🗸 Territories	V More V 🖉
★ 63 iten	Leads All Open Leads ms • Sorted by Created Date • Filtered by	r Lead Status ∙ Updal	ted 8 minutes ago					New	Import C	hange Status 🔻
	NAME ∨ STATE/P	V MOBILE N	✓ EMAIL ✓	LEAD ST V	′ CURREN ∨	POSITION V	AREA O 🗸	CREAT V	OWNER 🗸 🛛	UNREAD 🗸
1	Greg Stephens VIC	0444448884	greg.stephe	New		Plumber	Employmen	5/03/2018	Employmen	✓ ▼
2	Employee			Contacted			Employmen	5/03/2018	Jannis	
3	Robert Smith	0405307043	jack.kenny	New			Buy a Franc	21/02/201	Franchise S	v) V
4	James Brown NSW	040000000	) mike@franc	New			Buy a Franc	20/12/201	Franchise S	✓ ▼
5	Mike Medves		mike@franc	In Progress			Buy a Franc	23/10/201	rsale	
6	test converted	0414444444	÷	New			Buy a Franc	6/10/2017	fsys	
7	Robert Jacks NSW	0424463511		New	TradeZone	Tradesman	Buy a Franc	5/10/2017	rsale	✓ ▼
8	John Ali NSW	0424463511	L	New	Bunnings	Executive	Buy a Franc	5/10/2017	rsale	✓ ▼
	Invoices	Home	Chatter Ir	nvoices V	Payments	Expenses	s 🗸 Mana	agement Logs	✓ Files ✓	New
9 ite	AII ▼ ams • Sorted by Invoice Number •	Filtered by all inv	voices • Updatec	l a few seconds	ago			\$ •		× • •
	INVOICE 🕇 🗸 AMO	DUNT V	STATUS	V CREATE	D BY	V CREA	TED 🗸	DUE DATE	✓ HAS	
1	CR-00002 AUD	0.00	Closed	Ringwoo	d Franchisee	20/08	3/2018			
2	CR-00003 AUD	150.00	Open	Ringwoo	1.5	20/0	2/2019			
3	CR-00004 AUD	0.00	•	-	a Franchisee	20/08	5/2010			
4			Open	Ringwoo	d Franchisee	20/08	3/2018			
	CR-00004 AUD	0.60.00	Open	Ringwoo	d Franchisee	20/08	3/2018 3/2018			
F	CR-00004 AUD	0 60.00	Open Open	Ringwoo Ringwoo	d Franchisee d Franchisee d Franchisee	20/0	3/2018 3/2018 3/2018			
5	CR-00004         AUE           CR-00005         AUD	0 60.00 0 100.00	Open Open Open	Ringwoo Ringwoo Ringwoo	d Franchisee d Franchisee d Franchisee d Franchisee	20/04 20/04 20/04 20/04	3/2018 3/2018 3/2018 3/2018	7/09/2019		
5 6	CR-00004         AUE           CR-00005         AUD           INV-00001         AUD	9 60.00 9 100.00 9 380.00	Open Open Open Closed	Ringwoo Ringwoo Ringwoo Ringwoo	d Franchisee d Franchisee d Franchisee d Franchisee d Franchisee	20/01 20/01 20/01 20/01 17/01	3/2018 3/2018 3/2018 3/2018 3/2018 1	17/08/2018		
5 6 7	CR-00004         AUC           CR-00005         AUD           INV-00001         AUD           INV-00002         AUD	<ul> <li>a 60.00</li> <li>b 100.00</li> <li>b 380.00</li> <li>b 475.00</li> </ul>	Open Open Open Closed Open	Ringwoo Ringwoo Ringwoo Ringwoo Ringwoo	d Franchisee d Franchisee d Franchisee d Franchisee d Franchisee d Franchisee	20/01 20/01 20/01 17/01 20/01	3/2018 3/2018 3/2018 3/2018 3/2018 1 3/2018 2	20/08/2018		
5 6 7 8	CR-00004         AUC           CR-00005         AUD           INV-00001         AUD           INV-00002         AUD           INV-00005         AUD	<ul> <li>a 60.00</li> <li>b 100.00</li> <li>c 380.00</li> <li>c 475.00</li> <li>c 300.00</li> </ul>	Open Open Closed Open Closed	Ringwoo Ringwoo Ringwoo Ringwoo Ringwoo Ringwoo	d Franchisee d Franchisee d Franchisee d Franchisee d Franchisee d Franchisee d Franchisee	20/01 20/01 20/01 20/01 17/01 20/04 21/04	3/2018 3/2018 3/2018 3/2018 1 3/2018 2 3/2018 2	17/08/2018 20/08/2018 21/08/2018		

2. Open the List View Control and choose Clone.

8		Q Search Le	eads and more				? 🌲 🐻
***	Franchise Recruitm Home Chatter	Leads 🗸 Accou	nts 🗸 Contacts 🗸	Opportunities 🗸	Contracts 🗸 Campaigns 🗸	Territories 🗸	More 🔻 💉
63 it	Leads All Open Leads ems · Sorted by Created Date · Filtered by Lead Status · Updat	ed 10 minutes ago			1 New	Import Change	Status 🗸
	NAME V STATE/P V MOBILE	EMAIL V LE	EAD ST 🗸 CURREN	✓ POSITION ✓ A	REA O LIST VIEW CONTROL		D V
1	Greg Stephens VIC 044448884	greg.stephe N	ew	Plumber E	mploymen New	ymen 🗸	
2	Employee	C	ontacted	E	mploymen Clone		
3	Robert Smith 0405307043	jack.kenny N	lew	В	uy a Franc. Rename	ise S 🖌	•
4	James Brown NSW 040000000	mike@franc N	lew	В	uy a Franc. Sharing Settings	ise S 📝	•
5	Mike Medves	mike@franc In	Progress	В	uy a Franc. Edit List Filters		•
6	test converted 0414444444	N	ew	В	uy a Franc. Select Fields to Display		•
7	Robert Jacks NSW 0424463511	N	lew TradeZone	Tradesman B	uy a Franc.	<b>~</b>	•
8	John Ali NSW 0424463511	N	lew Bunnings	Executive B	uy a Franc.	✓	•
9	Michael Wrig NSW 0424463511	N	lew Allens Elect.	Tradesman B	Reset Column Widths	✓	•
	Finance Managem Home	Chatter Invoid	ces 🧹 Payments	Expenses	<ul> <li>Management Logs</li> </ul>	Files ∨ M	lore V
9 i	items • Sorted by Invoice Number • Filtered by all inv	voices • Updated a m	ninute ago		\$ •	- C 💉	6 T
	INVOICE 🕇 🗸 AMOUNT 🗸	STATUS 🗸	CREATED BY	✓ CREAT	LIST VIEW CONTROLS	2 наз	
1	CR-00002 AUD 0.00	Closed	Ringwood Franchisee	20/08	New		
2	CR-00003 AUD 150.00	Open	Ringwood Franchisee	20/08	Clone		
3	CR-00004 AUD 0.00	Open	Ringwood Franchisee	20/08	Rename		
4	CR-00004 AUD 60.00	Open	Ringwood Franchisee	20/08	Sharing Settings		
5	G CR-00005 AUD 100.00	Open	Ringwood Franchisee	20/08	Sharing Settings		
6	inv-00001 AUD 380.00	Closed	Ringwood Franchisee	17/08	Edit List Filters		
7	INV-00002 AUD 475.00	Open	Ringwood Franchisee	20/08	Select Fields to Display		
8	3 INV-00006 AUD 300.00	Closed	Ringwood Franchisee	21/08	Delete		
g	INV-00007 AUD 175.00	Open	Ringwood Franchisee	21/08	Reset Column Widths		

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.

® <b>.</b> ::::	Franchise Re	cruitm н	ome Chatter	Q Search Le	ads and more	✓ Opport	tunities 🗸	Contracts	✓ Campaigns	★ ▼ Territories	🛯 ? 🌲 🐻 🗸 More 🕶 💉
<b>*</b> 50+ i	Leads Victorian O rems • Sorted by Cre	pen Leads 👻	y Lead Status • Upc	lated 3 minutes ago					New	Import Cha	nge Status 👻
	NAME V	STA V MO		LEA Y CU Y	PO V ARE	✓ C ↓ ✓	0W ×	UN 🗸			
1	Greg St	VIC 0444	4 greg.st	New	Plumber Emplo	5/03/	Emplo		Filters		$\rightarrow$
2	Employ			Contac	Emplo	5/03/	Jannis		•		
3	Robert	0405	i3 jack.ke	New	Buy a	= 21/02	Franchi	<ul> <li>Image: A start of the start of</li></ul>	Show m     All lead	ne Is	
4	James	NSW 0400	00 mike@	New	Field						
5	Mike M		mike@	In Prog	# Leads				Matching	all of these filters	
6	test con	0414	4	New					Lead St	atus ot contain, closed	×
7	Robert	NSW 0424	4	New TradeZ	Operator						
8	John Ali	NSW 0424	ı4	New Bunnin	equals				New Fil	ter*	×
9	Michael	NSW 0424	·4	New Allens	Malva						
10	VVIIIiam	NSW 0424		New Steven	value				Add Filte	r	Remove All
12	Richard	NSW 0424	dean ll	New Jones					Add Filter	r Logic	
13	Joseph	NSW 0424	4	Contac A.B Bui				Dono		20810	
14	Thomas	NSW 0424	4	Contac Pauls B				Done			
2	Finance	Managem	All 🔻 Home	Q Search Invo	ces v Payme	ents 🗸	Expenses	√ Man	agement Logs	★ ▼ ● Files ∨	? 📮 🐻
9 i	Invoices Invoice tems • Sorted by	s with Mone	ey Owing	▼ woices • Updated a fe	w seconds ago		<u>) i Si C</u>		\$ •		New
	INVOICE	<b>T</b> ∨ AMC	DUNT 🗸	STATUS V	CREATED BY	~	CREATE	D \	Cancel		Save 🔻
1	CR-00002	2 AUD	0.00	Closed	Dingwood Franc	hisoo	20/00/	2010			
2	CR-00003	B AUD	150.00						Filter by Owner		
3	CR-00004	4 AUD	0.00	Account Age				• -	All invoices		
4	CR-00004	4 AUD	60.00					. M	latching all of th	lese filters	
5	CR-00005	5 AUD	100.00	Operator					arenne ar er er		
6	INV-0000	AUD	380.00	equais				<u> </u>	New Filter*		×
7	INV-0000	AUD	475.00								
8	INV-0000	AUD	300.00	Value				A	dd Filter		Remove All
9	INV-0000	AUD	175.00						dd Filter Logic		
							Done				

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

8				٩	Search Le	ads and mo	ore					*	🗄 ? 🌲 🐻
***	Franchise Recruitm	. Home	Chatter	Leads 🗸	Accour	nts 🗸 (	Contacts 🗸	Oppor	tunities 🗸	Contract	s 🗸	Campaigns 🗸 Territorie	es 🗸 More 🔻 💉
<b>F</b> 0+ ite	Leads Victorian Open Lea	ads 👻	and Status	I Indated a fe	w seconds a	100						New Import	Change Status 🗸
50+ IR	ens - soned by onlead by Ow	ner - Filtered by	Leau Status -	opuated a re	w seconds a	igo	405	0.05	0.11				
1	NAME ✓ STA	✓ MO ✓	EM V	LEA V	CU V	PO V	ARE V	CRE V	OW ∨	0 ↓ ∨		Filters	$\rightarrow$
2	Robert	04053	iack.ke	New		Fluttiber	Buy a F	21/02	Franchi	✓	•		
3	James NSW	04000	, mike@	New			Buy a F	20/12	Franchi		•	Show me	
4	Roger Hill NSW	04244		Contac	Workw	Field		1				Airicuus	
5	Ryan Cl NSW	04244		Contac	All Car	State	/Province	-			Ŧ	Matching all of these filter	s
6	Carl Ba NSW	04244		In Prog	City Re							Lead Status	×
7	Henry T NSW	04244		In Prog	Pauls B	Operato	or	2				does not contain closed	
8	Harold NSW	04244		New	Miller	equa	ls				*	New Filter*	×
9	Peter Cl NSW	04244		New	Jones			ନ					
10	Patrick NSW	04244		New	Novak	Value		U			_	Add Filter	Remove All
11	Walter NSW	04244		New	Steven	VIC						A did Miles di sulla	
12	Jerry W NSW	04244		In Prog	CBD F			<u>Λ</u>				Add Hiter Logic	
14	Gregory NSW	04244		In Prog	Cosgro			~		Done			
<b>*</b>			All 🔻	Q Se	arch Invo	ices and r	nore					* - +	? 🖡 👼
***	Finance Manag	em	Home	Chatter	Invoid	es 🗸	Payment	s v l	Expenses	∨ Ma	nagem	ent Logs 🗸 🛛 Files 🥆	More 🔻 💉
9 ite	Invoices Invoices with ems • Sorted by Invoice N	Money C	<b>) wing</b> ed by all in	▼ voices • Up	dated 2 m	inutes ago						¢ • Ⅲ• C	New
	INVOICE 🕇 🗸	AMOUNT	· ~	STATUS	5 V	CREATE	D BY	$\sim$	CREATE	ED \	Cano	cel	Save 🔻
1	CR-00002	AUD 0.00		Closed		<sup>Din</sup>	d Franchia	~~	20/00/	2010			
2	CR-00003	AUD 150.	00	Field		U					Filter	by Owner	
3	CR-00004	AUD 0.00		Amou	nt Owing					•	All in	voices	
4	CR-00004	AUD 60.0	0			9	)						
5	CR-00005	AUD 100.	00	Operator		4	)				Matchi	ng all of these filters	
6	INV-00001	AUD 380.	00	greate	r than					•	New I	Filter*	×
7	INV-00002	AUD 475.	00			2							
8	INV-00006	AUD 300	00	Value		U					Add Fili	ter	Remove All
0	INV-00007	AUD 175	00	O									
			-			4			Done		Add Fill	ter Logic	

### 6. Now press **Save**.

8				Q	Search Le	ads and mo	ore						*		6
***	Franchise Recruitm.	Home	Chatter	Leads 🗸	Accour	nts 🗸 (	Contacts 🗸	Opport	unities 🗸	Contra	cts 🗸	Campaigns 🚿	<ul> <li>Territor</li> </ul>	es 🗸 More 🔻	a fear
×	Leads Victorian Open Le	ads 🔻										New	Import	Change Status	•
50+ i	tems • Sorted by Unread By Ov	ner • Filtered by	Lead Status •	Updated 3 m	ninutes ago							3	\$ • III •	C / C	Y
	NAME 🗸 STA	∨ мо… ∨	EM ∨	LEA 🗸	CU 🗸	PO 🗸	ARE 🗸	CRE 🗸	ow ∨	U 🗼	/	Cancel		Save	-
1	Greg St VIC	04444	greg.st	New		Plumber	Emplo	5/03/	Emplo	<b>~</b>	•			-	
2	Robert	04053	jack.ke	New			Buy a F	21/02	Franchi		•	Show me			
3	James NSW	04000	mike@	New			Buy a F	20/12	Franchi	<ul> <li>Image: A set of the set of the</li></ul>	•	All leads			
4	Roger Hill NSW	04244		Contac	Workw	Trades	Buy a F	5/07/	rsale	Image: A start of the start	•	Matching all	of those filte	re	
5	Ryan Cl NSW	04244		Contac	All Car	Trades	Buy a F	5/07/	rsale	Image: A start of the start	•	Matching an	or these filte	15	
6	Carl Ba NSW	04244		In Prog	City Re	Trades	Buy a F	5/07/	rsale	<b>~</b>	•	Lead Status	s ontain close	d	×
7	Henry T NSW	04244		In Prog	Pauls B	Trades	Buy a F	5/07/	rsale		•	does not c	ontain close	u	
8	Harold NSW	04244		New	Miller	Trades	Buy a F	5/07/	rsale		•	State/Provi	nce*		×
9	Peter Cl NSW	04244		New	Jones	Trades	Buy a F	5/07/	rsale	~	•	equals VI	C		
10	Patrick NSW	04244		New	Novak	Trades	Buy a F	5/07/	rsale	<b>v</b>	•	Add Eiltor		Pomou	
11	Walter NSW	04244		New	Steven	Trades	Buy a F	5/07/	rsale	<b>~</b>	•	Add Tiller		Remov	C All
12	Jerry W NSW	04244		New	Anders	Trades	Buy a F	5/07/	rsale	<b>~</b>	•	Add Filter Lo	gic		
	Finance Mana	gem	Home	Chatter	Invoid	es 🗸	Payment	s ✓ E	Expenses	✓ N	/lanagem	nent Logs 🗸	Files	✓ More ▼	2 1
9 i	Invoices Invoices with terns • Sorted by Invoice 1	Money (	<b>Dwing</b> red by all ir	▼ voices • Up	dated 5 m	inutes ago	,					\$ •	ĨĨ▼ C'	New	
	INVOICE 1	AMOUN	T V	STATU	s v	CREATE	D BY	$\sim$	CREATE	D \	Can	cel		Save	
1	CR-00002	AUD 0.00	C	Closed		Ringwoo	d Franchis	ee	20/08/	2018					
2	CR-00003	AUD 150	.00	Open		Ringwoo	d Franchis	ee	20/08/	2018	Filter	by Owner			
3	CR-00004	AUD 0.00	D	Open		Ringwoo	d Franchis	ee	20/08/	2018	All in	voices			
4	CR-00004	AUD 60.0	00	Open		Ringwoo	d Franchis	ee	20/08/	2018			- Cit		
5	CR-00005	AUD 100	.00	Open		Ringwoo	d Franchis	ee	20/08/	2018	Matchi	ng all of thes	e filters		
6	INV-00001	AUD 380	.00	Closed		Ringwoo	d Franchis	ee	17/08/	2018	Amo	unt Owing*		×	
7	INV-00002	AUD 475	.00	Open		Ringwoo	d Franchis	ee	20/08/	2018	grea				
8	INV-00006	AUD 300	.00	Closed		Ringwoo	d Franchis	ee	21/08/	2018	Add Fil	ter		Remove	AII
9	INV-00007	AUD 175	.00	Open		Ringwoo	d Franchis	ee	21/08/	2018	Add Fil	ter Logic			

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

Q Search Leads and more	*• 🖬 ? 单 👼
Franchise Recruitm Home Chatter Leads V Accounts V Contacts V Opportunities V Contracts V	Campaigns 🗸 Territories 🗸 More 🔻 🖋
Leads Victorian Open Leads	New     Import     Change Status       ☆ ▼     Ⅲ ▼     C <sup>4</sup> ✔
NAME ∨ STA ∨ MO ∨ EM ∨ LEA ∨ CU ∨ PO ∨ ARE ∨ CRE ∨ OW ∨ U ↓ ∨           1         Greg St VIC         04444 greg.st New         Plumber         Emplo 5/03/ Emplo ⊽/         ▼	Filters →
	Show me All leads
	Matching all of these filters
	Lead Status $$\times$$ does not contain closed
	State/Province × equals VIC
	Add Filter Remove All
	Add Filter Logic
All       Q       Search Invoices and more         III       Finance Managem       Home       Chatter       Invoices v       Payments v       Expenses v       Managem	ment Logs V Files V More V
Invoices Invoices with Money Owing	New & • Ⅲ • C <sup>4</sup> ▲ ■ ▼
INVOICE ↑ ✓ AMOUNT ✓ STATUS ✓ CREATED BY ✓ CREATED > Filter	5
1 CR-00003 AUD 150.00 Open Ringwood Franchisee 20/08/2018	
2 CR-00004 AUD 60.00 Open Ringwood Franchisee 20/08/2018	r by Owner
3 CR-00005 AUD 100.00 Open Ringwood Franchisee 20/08/2018 All i	nvoices
4 INV-00002 AUD 475.00 Open Ringwood Franchisee 20/08/2018	ing all of those filters
5 INV-00007 AUD 175.00 Open Ringwood Franchisee 21/08/2018	
Am grea	ount Owing X ater than AUD 0
Add F	ilter Remove All
Add F	ilter Logic

Now you can see your newly modified list view.

8		Q Search Leads and more		*• 🖬 ? 单 🐻						
***	Franchise Recruitm Home Cha	atter Leads 🗸 Accounts 🗸 Contacts 🗸 C	opportunities 🗸 Contracts 🗸 Campaigr	ns 🗸 Territories 🗸 More 🔻 🖋						
1 item	Leads Victorian Open Leads Victorian Open Leads Vic									
	NAME V STATE/P V MOBIL	LE $\checkmark$ EMAIL $\checkmark$ LEAD ST $\checkmark$ CURREN $\checkmark$	POSITION V AREA O V CREATE V	OWNER ✓ UNRE ↓ ✓						
1	Greg Stephens VIC 044444	48884 greg.stephe New	Plumber Employmen 5/03/2018	Employmen 🖌 💌						

2		All 🔻 🔍 Se	arch Invoices and	d more			• ? • 🐻					
• • • • • • • • •	Finance Managem	Home Chatter	Invoices 🗸	Payments 🗸	Expenses 🗸 Manager	ment Logs 🗸 🛛 Files	∨ More▼ 🖋					
5 iten	Invoices       New         5 items • Sorted by Invoice Number • Filtered by all invoices - Amount Owing • Updated 2 minutes ago       Image: Color											
	INVOICE 🕇 🗸 AMOUN	T 🗸 STATUS	G 🗸 CREAT	ED BY	✓ CREATED ✓ DUE	DATE V HAS	BEE ∨					
1	CR-00003 AUD 150	0.00 Open	Ringwo	ood Franchisee	20/08/2018							
2	CR-00004 AUD 60.0	00 Open	Ringwo	ood Franchisee	20/08/2018							
3	CR-00005 AUD 100	0.00 Open	Ringwo	ood Franchisee	20/08/2018							
4	INV-00002 AUD 475	5.00 Open	Ringwo	ood Franchisee	20/08/2018 20/	08/2018						
5	INV-00007 AUD 175	5.00 Open	Ringwo	ood Franchisee	21/08/2018 21/	08/2018						

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 leads that have been assigned to us that we have not yet contacted. To create a new list view

1. Open the List View Control and choose New.

8		Q Search Leads and m	iore		*• 🖬 ? 单 🐻
	Franchise Recruitm Home	Chatter Leads 🗸 Accounts 🗸	Contacts 🗸 Opportunities 🗸 Con	tracts 🗸 Campaigns 🗸	Territories 🗸 More 🔻 🖉
3 items	Leads Recently Viewed -		J.	New 1	mport Change Status
	NAME V MOBILE	✓ EMAIL ✓ LEAD STATUS ✓	CURRENT E V POSITION V A	REA LIST VIEW CONTROL	
1	George King	dean.llewellyn+ New	Bills Hardware Tradesman B	uy a F New	5/09/2017 3:4
2	James Brown 040000000	mike@franchis New	B	uy a F Clone	s 20/12/2017 3: 🔻
3	Richard Ward	dean.llewellyn+ New	Jones Services Tradesman B	uy a F Rename	s 5/10/2017 2:2 💌
<b>*</b>	Finance Managem Home	All V Q Search Contacts an Chatter Accounts V Contact	d more ts v Contracts v Invoices v	Sharing Settings Show List Filters Select Fields to Display Delete Reset Column Widths	★▼     ●     ?     ●     ⑤       nents     ∨     More▼     ✓       New     Send List Email
5 itor	All CONTACTS	Lindated 27 minutes ago	Q Search this lis	t 🕸 🗸	
Jiter				LIST VIEW CONTROLS	-2
		ACCOUNT NAME V TITLE	V PHONE V EM	New	
1	Greg Cleary	Greg Cleary		New	rfran
2	Janet Baker	Janet Baker		Clone	rfran 💌
3			ma	Rename	rrran 💌
4	Ringwood East	FCS Ringwood East	0404 030 808	Sharing Settings	
5	Ringwood Franchisee	rus kingwood	0404 303 808	Edit List Filters	
				Select Fields to Display	
				Delete	

2. Enter the new List Name and press Save.

New List View	
*List Name	
My New Leads	
When some this list day 2	9
Oply Loop see this list view?	<u>ک</u>
	Cancel Save
New List View	,
* List Name	
VIC Contacts	
Who sees this list view?	
<ul> <li>Only I can see this list view</li> </ul>	
All users can see this list view ()	
Share list view with groups of users 🕕	

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

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

<b></b>	Q Search Leads and more	h	*• 🖬 ? 单 👼			
Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸 Co	ntacts 🗸 Opportunities 🗸 Contracts 🗸	Campaigns 🗸 Territories 🗸 More 🔻 💉			
Leads My New Leads 50+ items - Sorted by Name - Updated a few seconds ago			New Import Change Status ▼ \$\$ • Ⅲ • C   C   \$\$ € ▼			
	STATE/ ∨ LEAD ST ∨ U	NREA V CREATE V OWNER V	Filters ->			
Anthony An dean.ilewei     Arthur Green	QLD In Progress	5/09/2017 rsale ▼ 5/07/2017 rsale ▼	Show me			
Bevan ward     Carl Baker     Christopher	NSW In Progress	5/04/2017         rsale           5/07/2017         rsale           5/09/2017         rsale	Add Filter Remove All			
All	C Search Contacts and r ter Accounts      Contacts	nore Contracts V Invoices V Invoice	e Runs v Payments v More v 🖌			
Contacts     New     Send List Email       1 item · Sorted by Name · Filtered by my contacts · Updated a few seconds ago     Q. Search this list     Image: Color						
NAME ↑         V         ACCOUNT NAME           1         Ringwood East         FCS Ringwood East	<ul> <li>✓ PHONE</li> <li>✓ PHONE</li> <li>✓ 0404 030 808</li> </ul>	IL V TITLE V CONT V fmanv	Filters			
			Filter by Owner My contacts			
			Add Filter Remove All			

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

8		Q Search L	eads and more				*• 🖬 ? 🜲 👼
	Franchise Recruitm Home Chatter	Leads 🗸 Accou	unts 🗸 Contacts 🗸	Opportunities	✓ Contracts	🗸 Campaigns 🗸	Territories 🗸 More 🔻 🖋
<b>5</b> 0+ ite	Leads My New Leads ▼ errs - Sorted by Name - Updated 3 minutes ago	ctate/ >/ le	AD ST. M. LINDEA	CDEATE N	OWNER	New Imp	oort Change Status ▼ Ⅲ ・ C
1	Anthony An dean.llewel	QLD Ne	W	CREATE V	OWNER V	Filters	$\rightarrow$
2	Arthur Green	QLD In	Pro Field	U			
3	Bevan Ward	NSW Co	Lead Status			Show me     My leads	
4	Carl Baker	NSW In	Pro	•		inty icuus	
5	Christopher	NSW Co	nta Operator	2		Matching all of th	ese filters
6	Daniel Walker	NSW In	Pro 🗸 New			New Filter*	×
7	David Smith	NSW Co	nti Contacted				8
8	Edward Joh	NSW Ne	W In Brogross			Add Filter	Remove All
9	Frank Kelly	NSW Ne	W				
10	Gabriel Taylor	NSW Ext	Exhausted				
11	Gary Walker	NSW Ne	Converted		Done		
2	, All		Contacts and more			-	★ -  🖪 ? 单 (ੋ)
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### 5. Press Save.

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1 Anthony An dean.llewel	QLD N	New		5/09/2017	rsale		
2 Arthur Green	QLD I	n Progress		5/07/2017	rsale	Show me	
3 Bevan Ward	NSW C	Contacted		5/04/2017	rsale	My leads	
4 Carl Baker	NSW I	n Progress	Image: A start and a start	5/07/2017	rsale	Matching all of these filters	
5 Christopher	NSW C	Contacted		5/09/2017	rsale		
6 Daniel Walker	NSW I	n Progress		5/09/2017	rsale	Lead Status*     equals New	
7 David Smith	NSW C	Contacted		5/08/2017	rsale		
8 Edward Joh	NSW N	New		5/09/2017	rsale	Add Filter     Remove All	
9 Frank Kelly	NSW N	New		5/08/2017	rsale	Add Filter Logic	
10 Gabriel Taylor	NSW E	Exhausted		5/07/2017	rsale	•	
All •       Q. Search Contacts and more         III •       Contacts •         Contacts       Contacts •         VIC Contacts •       New         Send List Email							
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						Filter by Owner My contacts	
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						Add Filter Logic	
6. Press the arrow to remove the **Filters** pane.

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8	John Ali	NSW New		5/10/2017 rsale	•	Add Filter Remove All
9	Jose Lee	NSW New		5/08/2017 rsale	•	Add Filter Logic
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7. Now you can see your newly modified list view.

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## 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.

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5	Christopher Tayle	or						Edit List Filters			•
6	Daniel Walker							Select Fields to Display			▼
7	David Smith							Delete			•
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9	Edward Johnson							Reset Column Widths			▼
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3. From Available Fields, select the fields you want to make visible.



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

State of Interest		Name	
Street		Name	-
Title		Email	_
Unread By Owner		Mobile	
Unsubscribe		Created Date	-1
Website		State/Province	
Zip/Postal Code	2		
Zip/Postal Code	2		

Select Fields to Display

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



Select Fields to Display

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

Available Fields Visible Fields State of Interest Name State/Province Mobile Street 4 Email Title Created Date Unread By Owner Unsubscribe Website Cancel Save Now you can see the updated list. 8 \* 🖬 ? 📮 🐻 All 🗸 🔍 Search Leads and more.. Cro Franchise Recruitm.. Home Chatter Leads V Accounts V Contacts V Opportunities V Contracts V Campaigns V Territories 🗸 More 🔻 My Sales Leads Add to Campaign 🛛 🚽 Import New \*• II• C 🖌 C T 50+ items • Sorted by Name • Filtered by my leads • Updated a few seconds ago NAME 🕇 ✓ MOBILE ✓ EMAIL ✓ CREATED DATE Andreas Fotos 0488798644 andreas.fotos@hotmail.com 20/03/2018 6:11 AM 1 2 Arthur Green 0424463511 5/07/2017 3:48 PM T 0424463511 Bevan Ward 5/04/2017 3:48 PM 3 . Carl Baker 0424463511 5/07/2017 3:48 PM Christopher Taylor 0424463511 5/09/2017 3:48 PM Ŧ Daniel Walker 0424463511 5/09/2017 3:48 PM -\* 🖬 ? 🐥 🕅 ٩ Q Search Accounts and more... Home Chatter Accounts V Contacts V Contracts V Management Logs V Invoices V Invoice Runs V More V Finance Managem... Accounts Accounts for Territory -New 🅸 • 🖩 • C 💉 🕼 🔻 5 items · Sorted by Account Name · Filtered by Franchise · Updated a few seconds ago ✓ PHONE ✓ EMAIL ACCOUNT NAME 🕇 🛛 🗸 ACCOUNT RECORD T... 🗸 FRANCHISE ✓ ACCOUNT OWNER AL... ✓ 0404040404 Alistair Campbell Individual FCS Bondi Beach a.campbell@gmail.com.ux swalker 1 2 Bondi Web Design Business FCS Bondi Beach (02) 9300 6003 info@bondiwebdesign.com swalker -James Brown Individual FCS Bondi Beach 0431889665 mike+test@franchiseclou... swalker -3 Martin Newberry Individual FCS Bondi Beach 0435778449 swalker Ronald Pham Individual FCS Bondi Beach swalker -5

Select Fields to Display

## 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.

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25 iter	Leads My New Leads ▼ ns • Sorted by Name • Filtered by Lead Status • Updated 10 mi	nutes ago	1	New Im	port Change Status	<ul><li>▼</li></ul>
	NAME↑ ✓ EMAIL ✓ CC	MPANY V STATE/PROVI V	LEAD STATUS 🗸 UNREAD BY	C LIST VIEW CONTROLS	🗸 OWNER ALIAS 🗸	
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2	Edward Johnson	NSW	New	Clone	rsale <b>2</b>	•
3	Frank Kelly	NSW	New	Rename		•
4	Gary Walker	NSW	New	Sharing Settings	rsale	•
5	Harold Moore	NSW	New	Edit List Filters	rsale	•
6	Jeffrey Robinson	NSW	New	Select Fields to Display	rsale	•
7	Jerry Wright	NSW	New 🖌	Delete	rsale	•
8	John Ali	NSW	New	Beset Column Widths	rsale	•
9	Jose Lee	NSW	New		rsale	•
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1 ite	m • Sorted by Name • Filtered by my contacts - Mailing Sta	e/Province • Updated a minute ago	Q Search this list	\$ <b>\$</b> •	II. C. 🔪 🕼	<b>T</b>
	NAME↑ ✓ ACCOUNT	NAME 🗸 PHONE	✓ EMAIL	LIST VIEW CONTROLS	CONTACT OW 🗸	
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				Clone		
				Rename		
				Sharing Settings		
				Edit List Filters		
				Colore Fields to Disela		
				Select Fields to Display		
				Delete		

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.

## On first use

Here are some useful things to check the first time you use the system. Putting these things in place will help you be productive in your use of the system.

#### Ensure your user record is complete

1. Using the search box, select your **User** record. *See* How to search for information.

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Business Manage Home Chatter Accounts V Contacts V	Jobs v Job Q "John Smith" 2 rdbac	'k ∨ Material Price Lists ∨ Reports ∨ Dashboards ∨ 'More ♥
Today's Events	Today's Ta John Smith User - Mr	Assistant
12:30 PM Lunch break 23/01/2020 1:00 PM	ISI John Smith Contact	
12:30 PM Lunch break 23/01/2020 1:00 PM	John Smith Contact - FCS - Claymore	
View Calendar	Nothing due today. Be a go-getter, and check back soon.	Nothing needs your attention right now. Check back later.
Recent Records	View All	
John Smith	Key Deals	
FCS - Claymore	To see your opportunity-related data, contact your Salesforce admin.	
FCS - Bexley		
Cctober-09-2019-16:25:53-AEDT++1100.jpg		
<b>S</b> <u>JN-00457</u>		
View All		

- 2. On the User record, ensure the following fields contain complete and up-to-date information.
  - » Name
  - » Email
  - » Address
  - » Mobile
- 3. If you need to edit any of this information, press the **Edit** button.

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Business Manage Home Chatter Accounts V Contacts V	obs 🗸 Job Offers 🗸 Job Calendar Invoices 🗸 Payments 🗸 Customer Feedback	✓ Material Price Lists ✓ Reports ✓ John Smith ✓ × More ▼	1
John Smith			Edit
Share your awesomeness with th (Or at least with your colleagues	: world. n Chatter.)	Learn new skills on Trailhead, the fun way to learn Salesforce.	
Details		Related	
Name John Smith	Manager	🔀 Learning Plan Assignments (3)	•
Title Mr	Company Name	Franchisee Onboarding Completed On:	•
Email loryn.jenkins@franchisecloudsolutions.com	Phone	Progress %: 83.33% Due Date:	
Address 8 Byron Street Ringwood VIC 3134 Australia	Mobile 0421 788 574	Work Health and Safety Completed On: Progress %: 66.67% Due Date:	•
About Me Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)		Discrimination in the workplace           Completed On:         6/09/2019           Progress %:         100.00%           Due Date:         100.00%	•
		View All	

4. When you are finished editing, press Save.

ame t Name ohn st Name st Name attemption st Name attemption ohn th attemption attemption th attempt	Manager Company Name Phone Mobile 0421 788 574
tt Name ohn sst Name sst Name mith e frr all ohn.smith@fcs.com.au fress set i Byron Street // State/Province itingwood VIC //Postal Code Country	Company Name Phone Mobile 0421 788 574
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3 Byron Street	
y State/Province VIC /Postal Code Country	
Vingwood         VIC           /Postal Code         Country	
/Postal Code Country	
Australia	
out Me	

If you change the Email address, as shown in these examples, you will need to confirm that this is your email address. You can do this by going to your email inbox, and clicking on the link in the email that Salesforce sends you.

Set a default email signature

1. From View Profile choose Settings.



2. Go to My Email Settings.

FRANCHISE CLOUD SOLUTIONS	All 👻 🔍 Search Salesforce 🕅 🚼 🛃 ? 🌲	8
Business Manage	Home Chatter Accounts 🗸 Contacts 🗸 Jobs 🗸 Job Offers 🗸 Job Calendar Invoices 🗸 Payments 🗸 Customer Feedback 🗸 Material Price Lists 🗸 Reports 🗸 John Smith 🗸 X More 💌	
Q Quick Find	to Personal Information	
<ul> <li>My Personal Information</li> </ul>		
Advanced User Details		
Approver Settings	Personal Information	Ŭ
Change My Password	Details I = Required informati	2n
Connections	First Name John	
Grant Account Login Access	Last Name Smith	
Language & Time Zone	Alia Fo	
Login History	Comme I (Styr), eliminativa francesia Uterramane / Transfordescoverse (Specificational 1.5 emo	
Personal Information	Nickname franchiseeowner 1	
Reset My Security Token	Phone Estando	
Security Central	Pax Pax	
> Display & Layout	Mobilia 0421788 574	
v Email	Address	
My Email Settings		
My Email to Salesforce	a styron street	
My Unresolved Items	City Ringwood	
> Chatter	ZipPostal Code 354	
> Calendar & Reminders	Country Australia	
> Desktop Add-Ons	My Work Information	
> Import	Company Name	
	Titis Mr	
	Department	
	Division	
	Employee Numeer	
	End day thook 3	
	Sarev Cancel	

3. In the Email Signature field, enter plain text or HTML for your signature.

FRANCHISE CLOUD SOLUTIONS	All v Q. Search Salesforce	💌 🖽 ? 🌣 Ք 🚳
Business Manage	Home Chatter Accounts v Contacts v Jobs v Job Offers v Job Calendar Invoices v Payments v Customer Feedback v Material Price Lists v Reports v Dashboards v	Calendar 🗸 More 🔻 🖌
Q. Quick Find	to My Email Settings	
Approver Settings	My Email Settings	Help for this Page 🥹
Change My Password	Outgoing Email Settings	Required Information
Connections Grant Account Login Access Language & Time Zone Login History Personal Information Reset My Security Token Security Central > Display & Layout	Here would you has your mance to appear conjour outpointy emerit Italia was Mart email address would you has to use as your return address Difful Address Muid you has to address and the state of t	
V Email	Note: All outgoing emails will contain a "Powered by Salesforce" tag line at the bottom. This tag can be removed in the paid Editions of the product.	
My Email to Salesforce My Unresolved Items	Subscriptions CROWER Stateborg CRU Context End Alerts  CROWER Stateborg CRU Context Alerts to Daily Dept	
> Chatter	Street Canact	
> Calendar & Reminders		
> Desktop Add-Ons		
> Import		

4. In the Email Signature field, enter the code {{{Sender.Email\_Signature\_\_c}} then press **Save**.

FRANCHISE	All v Q, Search Salesforce	🕞 🖪 ? 🌲 🦸	3
Business Manage	Home Chatter Accounts 🗸 Contacts 🗸 Jobs 🗸 Job Offers 🗸 Job Calendar Invoices 🗸 Payments 🗸 Customer Feedback 🗸 Material Price Lists 🗸 Reports 🗸 'John Smith 🧸	× More 🔻	2
Q Quick Find	My Email Settings		
Advanced User Details Approver Settings	My Email Settings	Help for this Page 🥑	
Change My Password Connections Grant Account Light Access Language & Time Zohe Login History Personal Information Reset My Security Central Security Central Security Central Security Central V Email My Email Settings My Email Settings	Outgoing Email Setting:         How would you like your rame to apport on your obdoing email?         Durit films       Join Smith         What email address would you like to an a your rene address?       The spreader address?         Would you like to address would you like to an your rene address?       The spreader address?         Would you like to address would you like to address?       The spreader address?         Memoid time       The spreader address?       The spreader address?         Memoid time       The spreader address?       The spreader address address address address address address?         Excell adjustion       ()Streader Email Spreader.       The spreader address addre	I - Regint Information	
> Chatter	Save Cencel		
Calendar & Reminders     Desktop Add-Ons     Import			

Inserting the Email Signature field will cause all non-template emails you send to use an Email Signature that is defined by your system administrator. If the information in that Email Signature needs to change, you will need to ask your system administrator to update the Email Signature field on the User record.

To ensure template emails also use your custom signature, *See* "How to review email template headers and footers" on page 198.

#### Create custom email templates

The system comes with two default Email Templates

- » Quote template
- » Invoice template

These email templates are used by the Nextdoc document generation feature whenever you generate Quotes or Invoices and send them to customers.

You should review these email templates to ensure they are suitable for your business.

To use your own template instead of the default template, see

- "How to create a custom email template" on page 201
- » How to create a Quote email template
- » How to create an Invoice email template

You may very well also want to create additional Job email templates, such as

- » A new Quote job
- » A new Charge & Dojob

#### **Review your Franchise Profile Account settings**

1. Work through the chapter Working with your Franchise Profile Account ensuring all the settings on your Franchise Profile Account are suitable for your business.

## 

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# Working with Leads

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## **Understanding Leads**

When someone expresses an interest in buying a franchise, we capture the interest as a lead. The lead usually represents a person, and we capture the lead so that we can qualify them into the sales process.

A lead therefore represents an unqualified lead. The work we do with the prospect during the lead phase is to

- » qualify them as being a likely candidate for recruitment into the franchise network, or
- >> disqualify them as quickly as possible so you can focus your energies on higher quality prospects

Qualified leads are converted to opportunities, *See* "How to convert a lead into an opportunity" on page 74.

The tools and statuses provided by the lead page is designed to assist you with lead qualification.

### Lead statuses

Lead Statuses allow you to record "where a lead is up to" in the process. "Where you are up to" is combination of

Exhausted

Converted

» actions your or your team have taken

Contacted

» responses by the candidate

The purpose of these actions and responses is to gauge whether you can

In Progress

» disqualify the lead, or

New

» convert the lead into a qualified opportunity

#### Lead status summary

Lead statuses are described below.

✓ Mark Status as Complete

Lead Status	Description
New	The lead is created and the candidate has not yet been contacted.
Contacted	Initial contact has been made with the candidate.
In Progress	The candidate is engaged in discussions but has not yet made a com- mitment to proceeding, or you are still determining whether the candidate is a realistic prospect as a franchise recruit.
Exhausted	The candidate is unwilling to meet or you have determined that the can- didate is not a good fit.
Converted	Candidate is willing to engage in meaningful discussions and you are comfortable they represent a reasonable opportunity for further discussions regarding franchise recruitment.

## Where leads come from

### Manually created leads

Sometimes you will want to create leads directly within the system.

#### When to create a new lead

Leads should usually represent people who have responded to a Campaign. If you send mail to a whole list, it's good to add Leads to represent those people who have responded to the mail.

When you are sending an offer to people already in Salesforce then it is good to add them as Campaign Members when you send out the mail.

The most common ways to add leads are:

- When an individual responds to a lead, See "How to mark a lead as belonging to a campaign" on page 243.
- When you are sending offers to people already in your database, See "How to mark many existing leads as campaign members" on page 245.
- When you have a list of people outside Salesforce, See "How to import leads from an external source" on page 246.
- Add leads directly from your website, See "How to populate leads from your website" on page 241.

#### How to create a new lead

When you're answering a phone call, you will want to capture the details from the caller. To do this, you need to create a lead. Here's how you create a lead.

#### To create a new lead

1. From the **Leads** tab, press **New**.

8				1	_	٩	Search l	eads an	d more								*	8?	¢ 1	6
	Fra	anchise Recruitm		Home	Chatter	Leads 🗸	Accour	nts 🗸	Contacts	$\sim$	Opportunities	$\sim$	Contracts 🗸	Cam	paigns	~	Territories 💉	<ul> <li>Mor</li> </ul>	e 🔻	
5-11	( /	alles MGTAN	111.1	S JIIIite	/!\\\\	-11( _///	275111	H = X	NNN 711	li (	711/5-7117		//~\UGI <b>9</b>	1.10	as 711	lil	7138-71	( 7/)	1/25/11	110 N
×	Le R	ads ecently Viewed	•										2			New	Import	Char	ige Status	-
3 ite	ems • L	Ipdated a few seconds a	go														\$ ·	* C		7
		NAME	$\sim$	TITLE	$\sim$	COMPANY	~	PHON	E	$\sim$	MOBILE	$\sim$	EMAIL	$\sim$	LEAD	STATU	s v o	WNER AI	.IAS 🗸	
1		Deborah Harriss									0404809635		deb.harr@gmail	.co	New		Sá	ile		•
2		Phuong Ngo									0404778678		phuong.ngo@g.	com	New		Sá	ile		•
3		Bob Smith									0431661889		b.smith@handy	vor	New		sa	ile		T

#### The **New Lead** dialog box appears.

		New Lead
Select a record type	•	Franchise Sales Franchise Sales Record Type Employment Candidate Employment Candidate Record Type
		Cancel Next

- 2. Select the type of Lead and click **Next**.
- 3. Complete the key contact details.

New Lead:	: Franchise Sales
Lead Information	
* Name	Lead Owner
Salutation	Sales
Mr. 💌	
First Name	
Steve	
Last Name	
Harriss	
Mobile	• Lead Status
0431 667 899	New
Email	Lead Source
st.har@gmail.com	Email
Position ()	Initial Contact Date  🕕
Brick-layer	
Current Employer 📵	_
Self-employed	
*Area of Interest 🕕	
Buy a Franchise 💌	
Preferred Communication Channel 0	
Email	<u>]</u>
Address Information	-
Address	
Assign using active assignment rule	Cancel Save & New Save

4. Then complete as much of the remainder of the form as you can, then press **Save**.

	New Lead: Fi	anchise Sales		
Street				
	4			
City	State/Province			
Zip/Postal Code	Country			
1:1 Meeting				
Preferred Date 1		Preferred Date 2		
	<b></b>			苗
Preferred Time 1 🕚		Preferred Time 2 🕕		
None	•	None		•
Additional Information				
Country of Interest		Unsubscribe		
Australia	•			
State of Interest ()		SMS Unsubscribe 🕚		
NSW	•			
System Information				
Lead Currency		Lead Record Type		
Australian Dollar	•	Franchise Sales		

## **Capture and confirm leads**

When someone expresses an interest in buying a franchise, we record the expression of interest as a lead. The lead usually represents a person, and we capture the lead so that we can qualify them into the sales process.

We can capture leads via the public website, enter them manually, or even import them from elsewhere.

## Where to find website leads

Website leads are automatically added to one of two queues. The queue is the owner of the Lead.

- » Franchise Sales leads are added to the Franchise Sales Queue.
- » Employment Candidate leads are added to the Employment Candidate Queue.

It is best practice to make someone the owner of a Lead in order to track who is responsible for the Lead, and whether all Leads are being followed up. You do this by making someone the Lead's owner.

To follow up on Franchise Sales leads from the website

1. From the **Leads** tab, open the List View Filter and select the Franchise Sales Queue.

8	Q Search Leads a	nd more 🖈 🗉 ? 🌣 🐥 🦉	5
***	Franchise Recruitm Home Chatter Leads 🗸 Accounts 🗸 Contacts	🗸 Opportunities 🗸 Contracts 🗸 Campaigns 🗸 Territories 🗸 Dashboards 🗸 Reports 🗸 More 🔻	
3 item	Leads Recently Viewed	New Import Change Status ▼	
	RECENT LIST VIEWS	✓ MOBILE ✓ EMAIL ✓ LEAD STATUS ✓ OWNER ALIAS ✓	
1	All Open Franchise Sale Leads	0431661889 b.smith@handyworks.c New sale	
2	All Open Leads	0404809635 deb.harr@gmail.com.au New sale 💌	
3	Employment Candidate Queue	0404778678 phuong.ngo@g.com New sale v	
	Franchise Sales Queue		
	<ul> <li>Recently Viewed</li> </ul>		

You can now see the list of leads that have come from the web.

To take ownership of the leads

1. Select the leads.

8					Q Se	earch Leads and n	nore				*		
• • • • • • •	Fran	chise Recruitm	Home	e Chatter	Leads 🗸	Accounts 🗸	Contacts 🗸	Opportunities 🗸	Contracts 🗸	Campaigns	✓ Territorie:	s 🗸 More	▼ .M*
2 item	Leads Franchise Sales Queue  2 Items selected										New Imp	ort Accept	• •
	-	т 🗸 сп	ry v	STATE/P	✓ MOBILE	✓ EMAIL	V LEAD ST	$\checkmark$ POSITION $\checkmark$	CURREN 🗸	CREATE 🗸	owner 🗸	UNREAD 🗸	,
1		Bob Smith			043166188	9 b.smith@ha	New			2/03/2018	Franchise S	<b>~</b>	•
2		Deborah Har			040480963	5 deb.harr@g	New			2/03/2018	Franchise S		•
3		James Brown		NSW	04000000	0 mike@franc	New			20/12/201	Franchise S	<b>~</b>	•
4		Phuong Ngo		VIC	040477867	8 phuong.ngo	New	Electrician		2/03/2018	Franchise S	<b>~</b>	•
5		Richard Ward Wa	iterloo	NSW		dean.llewell	New	Tradesman	Jones Servic	5/10/2017	Franchise S	<b>~</b>	•
6		Robert Smith			040530704	3 jack.kenny	. New			21/02/201	Franchise S	<b>~</b>	V

2. Press the Accept button.

8			Q Searc	h Leads and mor	re				*	•	L 🐻
***	Franchise Recruitm	Home Chatter	Leads 🗸 Acc	counts 🗸 Co	ontacts 🗸 🗸	Opportunities 🗸	Contracts 🗸	Campaigns	<ul> <li>Territories</li> </ul>	V More	•
2 item	Leads Franchise Sales Queue  2 litems selected									rt Accept	<b>v</b>
	■ NAME ↑ ∨ CITY	✓ STATE/P	✓ MOBILE ✓	email 🗸	LEAD ST N	POSITION V	CURREN V	CREATE 🗸	OWNER 🗸	UNREAD V	
1	✓ Bob Smith		0431661889	b.smith@ha	New			2/03/2018	Franchise S		•
2	Deborah Har		0404809635	deb.harr@g	New			2/03/2018	Franchise S	✓	•
3	James Brown	NSW	040000000	mike@franc	New			20/12/201	Franchise S	<b>~</b>	•
4	Phuong Ngo	VIC	0404778678	phuong.ngo	New	Electrician		2/03/2018	Franchise S	¥	•
5	Richard Ward Waterlo	o NSW		dean.llewell	New	Tradesman	Jones Servic	5/10/2017	Franchise S	<b>~</b>	•
6	Robert Smith		0405307043	jack.kenny	New			21/02/201	Franchise S		V

You are now the owner of the selected leads.

To assign leads to someone else

1. Open the lead detail.

8		Q Search Leads and more		★	6
***	Franchise Recruitm Home Chatter	Leads V Accounts V Contacts	✓ Opportunities ✓ Contracts ✓	Campaigns 🗸 Territories 🗸 More 🖷	
3 item	Leads Recently Viewed	(~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	/ 2000/01/1/715571 (31637/ 2	New Import Change Status	
	NAME V TITLE V	COMPANY V PHONE	MOBILE V EMAIL V	LEAD STATUS $\checkmark$ OWNER ALIAS $\checkmark$	
1	Bob Smith		0431661889 b.smith@handyw	New sale	•
2	Deborah Harriss		0404809635 deb.harr@gmail.c	New sale	•
3	Phuong Ngo		0404778678 phuong.ngo@g.com	New sale	•

2. Press the **Change Owner** button.

8		Q Search Leads and mo	re		★ 🖬 ? 🌣 单 🐻
Franchise Recruitm	Home Chatter	Leads 🗸 Accounts 🗸	Contacts 🗸 Opportunities	✓ Contracts ✓ 0	Campaigns 🗸 Territories 🗸 More 🔻 🖋
Lead Deborah Harriss				+ Follow	Edit Delete Change Owner
Position Current Employe Seamstress Harris World	r Mobile 0404809635	Email deb.harr@gmail.con	n.au	-	
New	Contacted	In Progress	Exhausted	Converted	✓ Mark Status as Complete
DETAILS RELATED				ACTIVI	TY CHATTER
✓ Lead Information					
Name Deborah Harriss		Lead Owner		Log a Ci	New Event New Task Email
0404809635		New		Creat	Aud

3. Select the person you want to be responsible for the lead.

	Change Lead Owner	
Search People		۹
Sales		
Administrator		
<ul> <li>Notes and attachments</li> </ul>		
• Open activities		
	Cancel	ubmit

You have now assigned a lead to a person responsible for qualifying and developing the sales opportunity.

## How to contact a lead

Franchise Recruitment provides the tools to track and record communications with each prospect.

#### To contact a lead

1. Search for the lead.

	Q deborah	🗟 🛡 🖪 ? 🌣 单 🐻
Franchise Recruitm Home Chatter	Q "deborah"	ntracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 💉
Quarterly Performance	Lead	Assistant
CLOSED AUD 30,000 OPEN (>70%) AUD 0 GOAL	<u>ب</u>	> U Opportunity has overdue tasks
30к —		> 🔛 30 days without any activity X
		> 🔛 30 days without any activity X

2. Open the lead detail, and note the prospect's **Preferred Communications Channel**.

	Q deborah	★ 🖬 📍 🕸 🌲 🐻
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Con	atracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Eead Deborah Harriss		+ Follow Edit Delete Change Owner -
Position Current Employer Mobile Seamstress Harris World 0404809	Email 635 deb.harr@gmail.com.au	
New Contacted	In Progress Exhausted	Converted V Mark Status as Complete
DETAILS RELATED		ACTIVITY CHATTER
✓ Lead Information		
Name Deborah Harriss	Lead Owner	Log a Call New Event New Task Email
Mobile 0404809635	Lead Status	Create new Add
Email deb.harr@gmail.com.au	Lead Source Web	Activity Timeline
Position (1) Seamstress	Initial Contact Date 0	Next Steps More Steps
Current Employer   Harris World	Hours Since Creation  224.00	No next steps. To get things moving, add a task or set up a
Area of Interest  Buy a Franchise	Days To Contacted 0	Past Activity
Preferred Communication Channel	/	No past activity. Past meetings and tasks marked as done show up here.
✓ Address Information		Load More Past Activities 🔻
Address		

3. When the prospect prefers the email channel, you can email directly from within Franchise Recruitment.

Image: Strength of the strengt of the strength of the strength of the strength of the s	Q     deborah       Leads     V       Accounts     V       Contacts     V       Opportunities     V	Contracts v Campaigns v Territories v More v 🖉
Lead Deborah Harriss		+ Follow Edit Delete Change Owner 🗸
Position Current Employer Mobile Seamstress Harris World 040480963	Email 5 deb.harr@gmail.com.au	
New Contacted	In Progress Exhausted	Converted V Mark Status as Complete
DETAILS RELATED		ACTIVITY CHATTER
✓ Lead Information		
Name Deborah Harriss	Lead Owner	Log a Call New Event New Task Email
Mobile 0404809635	Lead Status	Create new Add
Email deb.harr@gmail.com.au	Lead Source Web	Activity Timeline
Position 💿 Seamstress	Initial Contact Date 🛛 🕕	Next Steps More Steps
Current Employer 🔹 🚯 🖉	Hours Since Creation   224.00	No next steps. To get things moving, add a task or set up a
Area of Interest 0 Buy a Franchise	Days To Contacted 🔹 🕕	Past Activity
Preferred Communication Channel		No past activity. Past meetings and tasks marked as done show up here.
✓ Address Information		Load More Past Activities 🔻
Address		

4. Now complete the email and press **Send**.



Franchise Recruitment tracks all communications so that everyone can see what each prospect received. You can see the sent email in the **Past Activ**ity section.

### How to disqualify a lead

When you take a lead as a Franchise Sale, and it becomes apparent that the person is actually more suited to being an employment candidate, you can change the lead to an Employment Candidate type.

To change the Lead from Sales Franchise to Employment Candidate

1. Locate the lead you want to change.

8		Q Search Leads and more		★▼ 🗄 ? ಭ 🌲	6
	Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸 Contacts	✓ Opportunities ✓ Contracts ✓	Campaigns 🗸 Territories 🗸 More 🔻	ø
3 iten	Leads Recently Viewed  ns · Updated 23 minutes ago	ANNOUNC DISCUSSION CONTRACTOR	NAVANI - TIVI - TIVI - N	New Import Change Status	<b>•</b>
	NAME V TITLE V CC	OMPANY V PHONE V	MOBILE $\checkmark$ EMAIL $\checkmark$	LEAD STATUS $\checkmark$ OWNER ALIAS $\checkmark$	
1	Bob Smith		0431661889 b.smith@handyw	New sale	•
2	Deborah Harriss		0404809635 deb.harr@gmail.c	New sale	•
3	Phuong Ngo		0404778678 phuong.ngo@g.com	New sale	•

2. Open the lead detail and select the Area of Interest field for editing.

8		Q Search Leads and mor	'e				*• 8	? 🌣 🌲 👼
Franchise Recruitm H	lome Chatter Lead	ds 🗸 Accounts 🗸	Contacts 🗸	Opportunities	✓ Con	tracts 🗸 Campaig	ns 🗸 Territories 🗸	🗸 More 🔻 💉
Deborah Harriss						+ Follow Ec	lit Delete Cha	ange Owner 🗨
Position Current Employer Seamstress Harris World	Mobile 0404809635	Email deb.harr@gmail.com	n.au					
> New	Contacted	In Progress		Exhausted	>	Converted	✓ Mark Statu	is as Complete
DETAILS RELATED						ACTIVITY	CHATTER	
✓ Lead Information								
Name Deborah Harriss		Lead Owner			£	Log a Call Ne	ew Event New Tas	k Email
Mobile 0404809635		Lead Status New				Create new		Add
Email deb.harr@gmail.com.au		Lead Source Web			/	Activity Timeline	• • •	Expand All
Position  Seamstress		Initial Contact Date 🕚				Next Steps		
Current Employer ① Harris World		Hours Since Creation ( 224.00				No next steps. To	get things moving, add	a task or set up a
Area of Interest  Buy a Franchise		Days To Contacted 🕕				Past Activity	meeting.	
Preferred Communication Channel 🔹 🕕						No past activity. F	Past meetings and tasks show up here.	marked as done

3. From the Area of Interest field, select *Employment Opportunities* then press Save.

	Q Search Leads and more	* = ? + 👼
Franchise Recruitm Home Chatter Leads	✓ Accounts ✓ Contacts ✓ Opportunities ✓ Contracts √	✓ Campaigns ∨ Territories ∨ More ▼
Position Current Employer Mobile	Email	+ Follow Edit Delete Change Owner V
Seamstress Harris World 0404809635	deb.harr@gmail.com	
New Contacted	In Progress Exhausted	Converted V Mark Status as Complete
DETAILS RELATED		ACTIVITY CHATTER
✓ Lead Information		
*Name Salutation None	Lead Owner Sales	Log a Call New Event New Task Email Create new Filters: All time - All activities - All types Refresh Expand All Next Steps More Steps
Mobile 0404800625	*Lead Status	No next steps. To get things moving, add a task or set up a
Email	Lead Source	Past Activities
deb.harr@gmail.com	Email	
Position  Seamstress	Initial Contact Date	No past activity. Past meetings and tasks marked as done show up here. Load More Past Activities
Current Employer	Hours Since Creation    444.00	
*Area of Interest	Days To Contacted 🛛 🕥	
Preferred Communication Channel 🔹	•	
Email		
Address Information     Cancel	Save	

The Lead has now been updated from a *Franchise Sales* lead into an *Employment Candidate* lead.

Created By Last Modified By H DEC Sales Manager, 5 /09 / 2017 2:49 DM H DEC Sales Manager, 5 /09 / 2019 4:22 DM	Lead Currency	Lead Record Type	
	Created By	Last Modified By 😽 REC Sales Manager, 5/09/2018 4:23 PM	

## **Candidate contact tools**

## How to capture the outcomes of phone calls

When a prospect or prospect calls and leaves a message, sometimes you just need to record information and other times someone needs to follow up the call.

#### To record information

- 1. Locate the Opportunity, Account or Lead. *See* "How to locate the right record" on page 188.
- 2. From the Activity pane's Log a Call tab, press Create new...

8	Q Search Leads and more	*• 🖬 ? 单 👼
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Co	ontracts 🗸 Campaigns 🥆 Territories 🗸 More 🔻 🖋
Andreas Fotos		+ Follow Edit Delete Change Owner V
Position Current Employer Mobile Carpenter Self-employed 048879864	Email 4 andreas.fotos@hotmail.com	
New Contacted	In Progress Exhausted	Converted V Mark Status as Complete
DETAILS RELATED		<b>ACTIVITY</b> CHATTER
✓ Lead Information		
Name Andreas Fotos	Lead Owner	Log a Call New Event New Task Email
Mobile 0488798644	Lead Status New	Create new Add
Email andreas.fotos@hotmail.com	Lead Source Other	Activity Timeline
Position Carpenter	Initial Contact Date 🔹	Next Steps ····· More Steps
Current Employer 🕕	Hours Since Creation (1) 4.00	> 🔚 Request for more inform Today 💌
Area of Interest ① Buy a Franchise	Days To Contacted 🔹	You have an upcoming Task
Preferred Communication Channel 0		Past Activity

The Log a Call activity pane displays.

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

8	Q Search Leads and more	** 🖽 ? 🐥 🐻
Franchise Recruitm Home	Chatter Leads V Accounts V Contacts V	Opportunities 🗸 Contracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Andreas Fotos		+ Follow Edit Delete Change Owner V
Position Current Employer Mo Carpenter Self-employed 048	bile Email 38798644 andreas.fotos@hotmail.com	
New Con	tacted In Progress	Exhausted Converted V Mark Status as Complete
DETAILS RELATED		ACTIVITY CHATTER
✓ Lead Information		
Name Andreas Fotos	Lead Owner	Log a Call New Event New Task Email
Mobile 0488798644	Lead Status	Returned your call
Email andreas.fotos@hotmail.com	Lead Source Other	Comments
Position () Carpenter	Initial Contact Date 🕚	Yes tomorrow is fine.
Current Employer	Hours Since Creation () 4.00	Name Andreas Fotos
Area of Interest Buy a Franchise	Days To Contacted	Save
Preferred Communication Channel		
The call is saved to t	he record's Activity T	imeline.

⑧↓ Franchi	se Recruitm	Home Chatter Lea	<ul> <li>Q. Search Leads and more</li> <li>ads → Accounts → Co</li> </ul>	 ntacts ∨ Opportunit	ies 🗸 Col	ntracts 🗸 Campaigns 🗸	Territories V More V
Lead Andre	as Fotos					+ Follow Edit D	elete Change Owner
Position Carpenter	Self-employed	Mobile 0488798644	Email andreas.fotos@hotmail.c	om			
$\mathbf{\mathbf{b}}$	New	Contacted	In Progress	Exhausted		Converted	<ul> <li>Mark Status as Complete</li> </ul>
DETAILS	RELATED					ACTIVITY CHA	TTER
✓ Lead Infe	ormation						
Name Andreas Fotos	5		Lead Owner			Log a Call New Event	t New Task Email
Mobile 0488798644			Lead Status New			Create new	Add
Email andreas.fotos	@hotmail.com		Lead Source Other			Activity Timeline	C Expand All
Position Carpenter			Initial Contact Date  🕕			Next Steps	
Current Employ Self-employed	er 🚺		Hours Since Creation (1) 5.00			No next steps. To get thing	s moving, add a task or set up a
Area of Interest Buy a Franchi	o se		Days To Contacted 🕚			m Past Activity	ieeting.
Preferred Comn	nunication Channel 🕚					> Returned your	call Today 💌
✓ Address	Information					You logged a call	
Address							Load More Past Activities

## How to plan tasks

To take a message that requires follow up:

- 1. Locate the Opportunity, Account or Lead. *See* "How to locate the right record" on page 188.
- 2. Select from the Activity pane the New Task tab.



The New Task activity pane displays.

- 3. Complete the details and press **Save**.
  - » Make the Subjectand Comments describe the task in as much detail as you can.
  - Set the Due Date based on the prospect's expectations for action. Sometimes this is implicit, but other times you need to ask the prospect to establish their expectation.
  - You would normally assign the action to the Lead Owner, although there may be circumstances in which it is appropriate to assign it to someone else.

8	Q Search Leads and more	🖈 🖬 ? 🐥 👼
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Contr	racts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Lead Andreas Fotos	[	+ Follow Edit Delete Change Owner V
Position Current Employer Mobile Carpenter Self-employed 0488798644	Email andreas.fotos@hotmail.com	
New Contacted	In Progress Exhausted	Converted Vark Status as Complete
DETAILS RELATED		ACTIVITY CHATTER
✓ Lead Information		
Name Andreas Fotos	Lead Owner	Log a Call New Event New Task Email
Mobile 0488798644	Lead Status New	Request for more information about sales terms
Email andreas.fotos@hotmail.com	Lead Source Other	Due Date
Position ① Carpenter	Initial Contact Date	*Assigned To
Current Employer  Self-employed	Hours Since Creation (1) 4.00	REC Sales Manager
Area of Interest  Buy a Franchise	Days To Contacted  🕕	Name Andreas Fotos
Preferred Communication Channel		Comments
		Andreas says he understands the terms but is seeking clarification on some specific details.
<ul> <li>Address information</li> </ul>		* Status
Address		Not Started
× 1:1 Meeting		* Priority
Preferred Date 1	Preferred Date 2	Normal
Preferred Time 1 🕚	Preferred Time 2	Save

The new task is added to Next Steps.

Leads V Accounts V Contacts V Opportunities V	Contracts ∨ Campaigns ∨ Territories ∨ * More▼ 🖋
	+ Follow Edit Delete Change Owner V
	Converted V Mark Status as Complete
	ACTIVITY CHATTER
Lead Owner	Log a Call New Event New Task Email
Lead Status Exhausted	Create new Add
Lead Source Other	Filters: All time • All activities • All types
Initial Contact Date   22/06/2018	Refresh Expand All
Hours Since Creation () 3,940.00	Next Steps More Steps
Days To Contacted 0 94	<ul> <li>Request for more infor 30/03 </li> <li>You have an upcoming Task</li> </ul>
	Past Activities
	Lead Source       Contacts ∨ Opportunities ∨         Lead Owner       Exhausted         Market Sales Manager       Parallel         Lead Source       Parallel         Differ       Initial Contact Date         22/06/2018       Parallel         Hours Since Creation       3,940.00         Days To Contacted       9         94       94

## **Qualifying leads**

## How to qualify a lead

The Franchise Recruitment lead process is designed to support effective lead qualification. The Lead detail view contains the steps and statuses to help you do this well. The lead detail has a lot of information about the qualification process.

#### To explore the Lead detail view

1. From the Leads tab, open the lead detail.

8		1	Q Search Leads and m	ore		*	🗄 ? 🌣 🌲 🍖	5
	Franchise Recruitm	Home Chatter	Leads 🗸 Accounts 🗸	Contacts 🗸 Opportunities	✓ Contracts ✓	Campaigns 🗸 Territ	ories 🗸 More 🔻 ,	
3 ite	Leads Recently Viewed ms • Updated 3 minutes ago	2		772- AUU   AMUUMUU - 27300	91 <i>01117 -</i> SW67 - S	New Import	Change Status	]
	NAME V 1	TITLE V	COMPANY V PHONE	$\checkmark$ MOBILE $\checkmark$	$_{ m EMAIL}$ $\checkmark$	LEAD STATUS V C	WNER ALIAS 🗸	
1	Bob Smith			0431661889	b.smith@handyw	New s	ale 💌	
2	Deborah Harriss			0404809635	deb.harr@gmail.c	New s	ale 💌	
3	Phuong Ngo			0404778678	phuong.ngo@g.com	New s	ale 💌	

2. Note the status bar, showing the statuses of **Current**, **Contacted**, **In Progress**, **Exhausted** and **Converted**.

8	Q Search Leads and more			? 🌣 🌲 🐻
Franchise Recruitm Home Chatte	r Leads 🗸 Accounts 🗸 Contacts 🔨	🗸 Opportunities 🗸 Cor	ntracts 🗸 Campaigns 🗸 Territories 🦴	🗸 More 🔻 💉
Head Mr. Bob Smith			+ Follow Edit Delete Char	nge Owner 🔻
Position Current Employer Mob Pranchise Sales 043	ile Email 1661889 b.smith@handyworks.com.au	1		
New Contacted	In Progress	Exhausted	Converted Vark Status	as Complete
DETAILS RELATED			ACTIVITY CHATTER	
✓ Lead Information				
Name Mr. Bob Smith	Lead Owner	£	Log a Call New Event New Task	Email
0431661889	New	/	Create new	Add

While the lead can capture a lot of information, the information that is critical is arranged at the top of the page.

These statuses show you the current state of the lead.

The purpose of the lead is to see who is likely to be serious about considering a purchase. A key indicator of intent is the willingness to meet in a one to one meeting.

- » The lead is created in the New status.
- When you have made initial contact, you will want to move the lead into the Contacted status.
- In Progress represents those who will require an on-going conversation and decision time.
- **Exhausted** represents those who will not agree to a meeting.
- **Converted** are those who have agreed to a one to one meeting.
3. To find out what each status means, click the **Show more** button.

8			Q See	arch Leads and mo	ore				★•   ?	¢ 🖡 🐻
***	Franchise Recruitm Hom	ne Chatter	Leads 🗸	Accounts 🗸	Contacts 🗸	Opportunities	✓ Con	tracts 🗸 Campai	igns 🗸 Territories 🗸	More 🔻 🖋
×	Lead Mr. Bob Smith					<u>a. (</u> 07:18		+ Follow	Edit Delete Chan	ge Owner 🔻
Positi Franc	on Current Employer chise Sale	Mobile 043166	1889	Email b.smith@handy	yworks.com.au					
	New	Contacted	$\rightarrow$	In Progress	$\rightarrow$	Exhausted	$\geq$	Converted	✓ Mark Status	as Complete
DE	TAILS RELATED							ΑCTIVITY	CHATTER	
$\sim$	Lead Information									
Nam Mr. I	e Bob Smith		Lead	d Owner Sales				Log a Call	New Event New Task	Email
Mob 043	<sup>ile</sup> 1661889		Lead	d Status V				Create new		Add

4. An advice panel opens, showing you Key Fields and Guidance for Success.

	Q Search Leads and more	* 🖬 ? 🕸 🖡 👩
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Oppo	rtunities 🗸 Contracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖉
Kr. Bob Smith		+ Follow Edit Delete Change Owner V
Position Current Employer Mobile Franchise Sales 043166	Email 1889 b.smith@handyworks.com.au	
New Contacted	In Progress Exhau	sted Converted ✓ Mark Status as Complete
KEY FIELDS	Edit GUIDANCE	FOR SUCCESS
Area of Interest   Buy a Franchise	Guidance	
Preferred Date 1	• Re • Ma 	view the lead details to determine the lead's fit for the franchise ske contact with the lead to gain a better understanding of their interest in rchasing a franchise, update any further information obtained
Preferred Time 1 🕚	• Ca • Or ap	pture call notes against the lead for record keeping purposes nee you have made initial contact with the lead, update the stage to an propriate value.

- Key Fields describes which of all the fields are most important for the qualification of the lead.
- » Guidance for Success describes best practice for each status.

The keys to success are right in the software. Follow the guidance through the process of qualifying the lead.

## How to move a lead to the next stage

To move a lead to a target stage

1. Click on the target status indicator.

	Q Search Leads and more		*• 🖬 ? 🌣 🜲 🐻
Franchise Recruitm Home Chatte	Leads 🗸 Accounts 🗸 Contacts 🗸	Opportunities 🗸 Contracts 🗸 Campaign	s 🗸 Territories 🗸 More 🔻 🖋
Mr. Bob Smith		+ Follow Edit	t Delete Change Owner 👻
Position Current Employer Mobi Franchise Sales 0433	e Email 661889 b.smith@handyworks.com.au		
> New Contacted	In Progress	Exhausted Converted	✓ Mark Status as Complete
DETAILS RELATED		ACTIVITY	CHATTER

2. Press the Mark as Current Status button.

8	Q. Se	arch Leads and more			*• 🖶 ? 🌣 单 🐻
Franchise Recruitm Hom	e Chatter Leads 🗸	Accounts 🗸 Contacts 🗸	Opportunities 🗸 Cor	ntracts 🗸 Campaigns 🥆	🗸 Territories 🗸 More 🔻 🖋
Mr. Bob Smith				+ Follow Edit	Delete Change Owner 👻
Position Current Employer Franchise Sales	Mobile 0431661889	Email b.smith@handyworks.com.au			
New	Contacted	In Progress	Exhausted	Converted	Mark as Current Status
DETAILS RELATED				ΑCTIVITY	CHATTER

You have now changed the lead status.

#### How to send emails to my leads

Franchise Recruitment gives you the capability of sending email to one or more leads. You can send an email to just one lead. Or you can send email to many of your leads at a time. Whenever you send emails, Franchise Recruitment stores the email in the lead activity history, so you will always know communication was received by each lead.

#### To send an email to one person

1. Search for the lead.

🛽 <b>1</b> — →	⊂ deborah	🔄 🖬 ? 🌣 🖡 🐻
Franchise Recruitm Home Chatter	Q "deborah"	ntracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 💉
Quarterly Performance	Eead	Assistant
CLOSED AUD 30,000 OPEN (>70%) AUD 0 GOAL -	·	> P Opportunity has overdue tasks X
30к		> 🔛 30 days without any activity 🗙 Ms. Emma Stone-
		> Yanger 30 days without any activity X

2. Open the lead detail, and click on the **Email** tab.

Franchise Recruitm	me Chatter Le	ads X Accounts X Contacts X Oppo	portunities v. Contracts v. Campaigns v. Territories v. Mor
	Anne Chatter Le		
Lead Deborah Harriss			+ Follow Edit Delete Change Owne
osition Current Employer eamstress Harris World	Mobile 0404809635	Email deb.harr@gmail.com.au	
New	Contacted	In Progress Exhau	usted Converted V Mark Status as Com
DETAILS RELATED			<b>ACTIVITY</b> CHATTER
✓ Lead Information			
Name Deborah Harriss		Lead Owner	Log a Call New Event New Task Er
Mobile 0404809635		Lead Status New	Create new
Email deb.harr@gmail.com.au		Lead Source Web	Activity Timeline
Position 🕕 Seamstress		Initial Contact Date 🕕	Next Steps More
		Hours Since Creation ① 224.00	No next steps. To get things moving, add a task or s
Harris World		Days To Contacted 🕕	meeung.
Harris World Area of Interest Buy a Franchise			Past Activity
Area of Interest   Area of Interest  Area of Int			Past Activity No past activity. Past meetings and tasks marked a show up here

3. The prospect's email address is already populated. Complete all the other usual email fields then press the **Send** button.

Log a Call	New Event New Task Email
* From	Sales <jon.kenny@franchisecloudsolut*< td=""></jon.kenny@franchisecloudsolut*<>
То	Deborah Harriss X
Всс	jon.kenny@franchisecloudsolutio ×
Subject	Confirm meeting time
Font	• Size •
BI	
69	
Hey De Great to like to n Jon	borah o speak with you over the phone. Would you neet in the evening next Monday?
Powere http://w	d by Salesforce ww.salesforce.com/
Related To	
🝟 👻 S	iearch Opportun Q
<i>© &lt;</i> />	え ❷ 亩 ௴ Send

The email is now recorded in the lead's activity history.

ACTIVITY	CHATT	ER	
Log a Call	New Event	New Task	Email
Create net	N		Add
Activity Time	line	T C	Expand All
Next Steps			
No next steps	. To get things n mee	noving, add a ta ting.	isk or set up a
Past Activity			
> 🔽 Cor   You	i <mark>firm meeting</mark> sent an email te	ti 12:53 PM Deborah Harri	∬   Today 💌
	Lo	ad More Past A	ctivities 🔻

It is really simple to send a mass email to all your leads.

To email all my leads:

1. From the **Leads** page, select a filter to show all your open leads.

8		1	Q Search Leads and mo	re		*	🗄 ? 🌣 🌲	6
	Franchise Recruitm	Home Chatter Lea	ads 🗸 Accounts 🗸	Contacts 🗸 Opportuniti	es 🗸 Contracts 🗸	Campaigns 🗸 Territ	ories 🗸 More 🕇	, and
3 item	Leads My open leads  violated as  violated by Name  violated as  viol	few seconds ago		22 - AUGUE - AUGUE - 20		New Import	Change Status	<ul><li>▼</li><li>▼</li></ul>
		EMAIL V CO	OMPANY STATE/PR	OVI 🗸 LEAD STATUS	✓ UNREAD BY O ✓	CREATED DATE 🗸 C	WNER ALIAS 🗸	
1	Bob Smith	b.smith@handyworks		In Progress		19/02/2018 2:48	sale	
2	Deborah Harriss	deb.harr@gmail.com		New		19/02/2018 2:51	sale	•
3	Phuong Ngo	phuong.ngo@g.com		New		19/02/2018 2:50	sale	•

2. Select all the names on the list (or, everyone you actually want to send the email to).

8						Q	Sea	rch Leads a	nd m	ore									2?	φı	6
	Fran	chise Recruitm	າ	Home	Chatter	Leads	~	Accounts	~	Contacts	$\sim$	Opportunities	~	Contracts N	~ C	ampaigns	~	Territori	es 🗸	More	•
3 item	Lead: My	s open leads	-	//\S/(//		A DENNIC	JIIIIII	) INC	102	////**\$1167)		S	<u>91</u> (			New	In to v	mport • III •	Chang C <sup>1</sup>	e Status	
		NAME 🕇	$\sim$	EMAIL	$\sim$	COMP	PANY	$\sim$	STATE	PROVI	$\sim$	LEAD STATUS	$\sim$	UNREAD BY C	D V	CREATE	D DAT	re 🗸 (	OWNER	ALIAS	$\sim$
1		Bob Smith		b.smith@har	ndyworks							In Progress				19/02/2	2018 2	2:48 9	ale		•
2		Deborah Harriss		deb.harr@gr	mail.com							New				19/02/2	2018 2	2:51 9	ale		•
3		Phuong Ngo		phuong.ngo	@g.com							New				19/02/2	2018 2	2:50 9	ale		•

3. Now click on the down arrow button, to see the **Send List Email** menu item.

8						Q	Sea	arch Leads a	and m	ore									2?	φ.		5
***	Fran	chise Recruitm	า	Home	Chatter	Leads	~	Accounts	~	Contacts	~	Opportunities	~	Contracts	~	Campaigns	~	Territor	ie. V	More	•	a mar
3 item	Leads My	s open leads	-	JINGT ( Z		<u> </u>	_11  !:( (		ЧС <i>Д</i>	////**\\\\{:			21(		(	New	Im ‡ •	port	Chang C <sup>i</sup>	ge Status Send List	Email	
		NAME 1	$\sim$	EMAIL	~	СОМ	PANY	$\sim$	STAT	E/PROVI	$\sim$	LEAD STATUS	$\sim$	UNREAD BY	Y O `	✓ CREATE	D DATE	~	OWNER	ALIAS	$\sim$	•
1	~	Bob Smith		b.smith@ha	andyworks							In Progress				19/02/	2018 2:4	48	sale			•
2	~	Deborah Harriss		deb.harr@g	mail.com							New				19/02/	2018 2:	51	sale			•
3	•	Phuong Ngo		phuong.ngc	o@g.com							New				19/02/	2018 2:	50	sale			•

4. Click the Send List Email menu item. The Send List Email dialog box displays.

							Sen	d Li	st Ei	mail			
5 0	×	(3 Sel	ected	Recipie	ents) M	y open	(l)	<					
ject													
Re	view				· · · · · · · · · · · · · · · · · · ·								
Size	• B	I	U	<u>A</u> -	i≡ :	:   E	±	4					
													ତ ଏନ 🛤
	ect Re Size	ect Review Size - B	ect Review Size • B I	Contraction of the second seco	O C Selected Recipie ect Review Size → B I U A.+ [	● 😧 (3 Selected Recipients) M ect Size • B I 및 A• IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	● (3 Selected Recipients) My oper ect Review Size • B I U A• I II II III	Sen	Send Li (3 Selected Recipients) My open L. × ect Review Size • B I U A• II II E II E II	Send List Er	Send List Email	Send List Email           Image: Constraint of the second	Send List Email

5. Now complete the normal details.



6. Before you send, press the **Review** tab.

		Send List Email	
Recipients	3 Selected	Recipients) My open I 🗙	
Come to the Big Tra	ide Show Event v	vith me!	
Content Review Recipients V Selected Recipients Bob Smith Deborah Harriss Phuong Ngo	nts	I would like to invite you as my personal guest to see us in action at this year's premiere trade show. For more information, check out the <u>Show Details</u> . — Jon	
		100/100 send limits remaining     Send	
9	Us	e the review page to make sure eve	erything is as it should be.

7. When you are satisfied, press **Send**.

	Send List Email
Recipients () 🔀 (3 Selected	Recipients) My open I ×
Come to the Big Trade Show Event	with me!
Content Review	
Recipients * Selectud Recipients Bob Smith Deborah Harriss Phuong Ngo	I would like to invite you as my personal guest to see us in action at this year's premiere trade show. For more information, check out the <u>Show Details</u> . — Jon
	100/100 send limits remaining Send

You have sent an email to many people. Each email is recorded on each Lead's Activity Timeline, so that you can always review the communications sent to each Lead.

Mass emails require filters to target the right sort of people. For more information, refer to Salesforce documentation <u>Edit List View Filters</u>.

## How to convert a lead into an opportunity

The lead process allows you to sift through all the incoming expressions of interest to identify the ones with the greatest potential for development into a sale. The best practice in Franchise Sales is to consider a lead to be qualified when you have:

- » an understanding that the person is a good fit for your offering
- » reached an agreement for a one to one meeting, and
- » set a date for the meeting

When these items have been met, then you are ready to indicate that the lead has been qualified. You do this by converting it into an opportunity. An opportunity is the next stage in the sales process. It supports the on-going activity needed in order to close the sale.

#### To convert the lead into an opportunity

1. Click on the Converted status.



2. Press Select Converted Status.

8			Q Sea	arch Leads and mo	ore					• • ?	tột 🏚	6
Franchi	se Recruitm	Home Chatter	Leads 🗸	Accounts 🗸	Contacts 🗸	Opportunities	∽ Cont	tracts 🗸 Car	mpaigns 🗸	Territories 🗸	More 🔻	. and t
Head Mr. Bo	b Smith							+ Follow	Edit Del	ete Chang	e Owner	•
Position Franchise Sales	Current Employ	yer Mobile 04316	51889	Email b.smith@handy	/works.com.au							
$\mathbf{\mathfrak{I}}$	~ >	~		In Progress		Exhausted		<u>Converted</u>		Select Convert	ed Status	
DETAILS	RELATED							ACTIVITY	CHAT	TER		

The Convert Lead dialog box appears.

When a Lead is converted the system creates two records. The Account records information about the person. The Opportunity records information about what the prospect is interested in buying.

3. If there is not already an account for this Lead, press **Convert**.

	Con	vert Le	ad				
✓ <u>Account</u>	Create New	- OR -	Choose Existing				
	Salutation		Account Search				
	None		Search for matching accounts				
	First Name		0 Account Matches				
	Bob						
	* Last Name						
	Smith		Update Lead Source				
	Record Type						
	Franchise Sales						
> Opportunity	Create New	- OR -	Choose Existing				
	Bob Smith-		To find opportunity, choose an existing account				
	Don't create an opportunity upon conversion						
*Record Owner			* Converted Status				
REC Sales M	lanager ×		Converted				
			Cancel Convert				
-							

If there is an existing account for this prospect, then select the matching Account and press **Convert**.

You have now converted the Lead into an Opportunity record with a related Person Account record. All the information you have captured and the activity history is transferred to the Account and Opportunity records for future reference. The Opportunity is now ready to provide both guidance and support for the on-going sales process.  $\overline{\phantom{a}}$ 

# Working with Opportunities

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Now advance the stage	
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## The Opportunity Process

An opportunity represents a person who has been qualified as a prospective purchaser of a franchise. They have expressed interest in a purchase, appear to be a reasonable fit for your franchise, and have agreed to a one on one meeting to discuss a purchase.

An Opportunity is a record summarizing information about a potential sale. An Opportunity represents stages in the sales process following lead conversion, and is most commonly created by converting a Lead into an Opportunity. It allows the capture of details regarding the franchise that a potential customer is interested in buying, their interests and drivers within the sale, and information necessary for drawing up contracts.

The Franchise Recruitment opportunity process consists of a number of statuses with specific activities to be achieved at each stage.



You can discover the activities related to each stage by toggling the **Show more** button.

$\mathbf{\mathfrak{S}}$	One on One I	Meeting	Reviewir	ng Informatior	n Te	erritory Reserve	t 🔪	Sourcing Fina	nce	Offer to Pu	ırchase	Long Ter	m Prospect	Closed	
	NDA (optio N	athan Pro	Program Pr	Store Discl	Due Dilige	Negotiation	MOU (opti	Document	Signing	Commenc	Fit Out	Complete	Terminated	✓ Mark Stage as Compl	ete



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

Experience in franchise sales has shown that working through these stages and activities for each sale is industry best practice.

Stage	Description	Keys to Success
One on One	You are gathering the information contained	Schedule the one on one meeting with the pro- spect based on their preferred date and time selections (if available)
Meeting	within the 1:1 Meet-	Conduct a one on one meeting.
	ing form	» Update the Account & Opportunity with your notes from the One on One Meeting
	You have gathered	» Update the Territories of Interest recorded against the opportunity as the prospect makes their selection
Reviewing Information	all the 1:1 Meeting information and are	» Update any new information on their approx- imate timeline
	reviewing it	Organize a Day on the Road with a Franchisee to help the prospect in their decision making process
Territory Reserved	Candidate has settled on a specific territory	» Update the Territories of Interest recorded against the opportunity when the prospect makes their final decision
		Description of the Update the Opportunity Product with the correct Product and Territory being purchased. This will reserve the Territory for this Opportunity.
Sourcing Fin- ancing	Candidate is seeking financing to complete the transaction	Review the prospect's financial position based on their assets and liabilities
		» Make the necessary introduction referrals for banking and vehicle finance as required
		» Capture all the details required for the contract
Offer to Purchase	Contract and dis- closure documents have been provided to the candidate	Create the draft contract record for the oppor- tunity, include all fees, performance criteria and guarantors as required
		Generate all relevant disclosure and legal doc- uments and send drafts to the customer
Long Term Prospect	Transaction will not proceed at this time	» If prospect meets the relevant criteria for recruitment but is unable to proceed, place in the Long Term Prospect list for on-going con- tent marketing campaigns.

Stage	Description	Keys to Success
Closed	Opportunity is com- plete	Once contract is finalized, update the oppor- tunity to Closed - Won or if the prospect does not proceed then Closed - Lost.

Stage	Keys to Success
	An NDA should be obtained for every candidate and opportunity but must be obtained for any Beaurepaires store conversion opportunity
NDA (optional)	The NDA should be sent to the candidate using the relevant email template. In the case of Beaurepaires conversions, the template includes the discussion concerning contact with our store and other associates.
	Request the Franchising & Licencing Director, Business Man- ager or their delegates to initiate the Nathan Profiler process with the candidate
Nathan Profiler	The candidate must have completed both the Information Request and the Self Assessment of the Nathan Profiler and cop- ies of both reports (available from the person initiating the pro- cess) should be saved in Franchise Cloud Solutions
	» Evaluate the reports carefully and, as necessary, raise any con- cerns with the the Franchising & Licencing Director or Business Manager
	Complete a face to face (physical or virtual) presentation of the relevant program using the presentation materials available in the Files section of Franchise Cloud Solutions
Program Present- ation	» Make notes of this meeting in Franchise Cloud Solutions, includ- ing your observations and evaluation of the questions asked by the candidate
	» If you are unsure of any question the candidate poses, promise a response and seek advice.
	If you elect to continue with the opportunity, send a GDT/TT credit application form to the candidate for completion

Stage	Keys to Success
	» This stage only applies to Beaurepaires conversion opportunities
Store Disclosure (Optional)	Request a standard store disclosure document for the stores/- territories you are discussing with the candidate
( 1 )	Provide the document to the candidate and save a copy in Franchise Cloud Solutions
	This stage is complete when the candidate provides a business plan or otherwise indicates they do not wish to proceed
Due Diligence	The business plan should be reviewed and any areas of concern noted for clarification or correction and a copy saved in Franchise Cloud Solutions
	The stage is complete when there is a "meeting of the minds" with respect to the deal, any special conditions, etc.
Negotiation	Any deviation from the store disclosure document or any special conditions must be discussed and agreed with the Franchising & Licencing Director or Business Manager before proceeding
	For "greenfield sites" in the Goodyear Autocare (Australia) net- work, you may (without any additional approval) offer a 100% concession on Franchise Fees (not Marketing Levy) for the first six months of the term, and a 50% concession for the second six months of the term.
	A Memorandum of Understanding applies to Beaurepaires con- version opportunities and, on extremely rare occaisions to other types of opportunities
MOU (optional)	» Ensure the proposed premises address is filled out on the related territory
	» Ensure a legal entity is created and includes a registered address
	Send the candidate the standard MOU via Docusign and ensure a signed copy is saved in Franchise Cloud Solutions
Document Pren	Advise the Franchising & Licencing Director or Business Man- ager you require agreements and/or disclosure document to be prepared by assigning them a task.
Documentriep	Ensure the relevant fields in the MOU / Contract Information sec- tion are completed and that the related territory has a premises address.

Stage	Keys to Success
	Once the relevant documents have been prepared, the Franchising & Licencing Director or Business Manager will send them to the candidate via Docusign.
Signing	Opportunities at this stage indicate the documents have been sent to the candidate for signing, but are not yet signed.
	Once the candidate has signed all the necessary documents via DocuSign, the stage will automatically update to Com- mencement.
Commencement	This stage is complete once the candidate has commenced trad- ing
Fit Out	This stage is complete once the store has been refurbished in accordance with the agreed montage
Complete	Opportunities may be marked as complete once all doc- umentation has been finalised, records, the store has commence trading and refurb is completed
Terminated	Terminating an opportunity is best done as early as possible so that you do not waste time with candidate which are not going to be successful
	» An opportunity can, therefore, be terminated at any stage

## The one on one meeting stage

The one on one meeting is one of the most important steps in the sales process. In this initial meeting, the sales representative should aim to determine:

- » Time-line to purchase a Franchise
- » Motivation and drivers to be involved with the Franchise
- » Territories of interest and decision-making criteria
- » Current financial position to make the investment in a Franchise

Discovering this information will assist you to further develop this opportunity.

#### How to schedule a one on one meeting

The prospect's preferred meeting time is generally captured at the lead stage. You can see the prospect's preference within the **Opportunity** page's **Details** tab.

DETAILS RELATED		
Opportunity Owner	Close Date 31/03/2018	
Opportunity Name Ms. Megan Ames-	Stage One on One Meeting	
Account Name Megan Ames	Probability (%) 30%	
Description	Amount	
	Primary Campaign Source	
✓ 1:1 Meeting		
Preferred Date 1 1 13/03/2018	 Preferred Date 2	
Preferred Time 1 🕕 Evening	 Preferred Time 2 🚯	
✓ Demonstration Day Information		
Demonstration Day	Demonstration Day Franchise 🛛 🕕	
Demonstration Date	Demonstration Day Contact 👔	

To schedule a one on one meeting meeting

1. From the **Opportunity Details** tab, hover over the **Account Name** to reveal contact details.

Image: Search of the searc	h Salesforce	s 🗸 Contracts	s 🗸 Campaigns	<ul> <li>Territories</li> <li>More</li> </ul>
Upportunity Megan Ames-		+ Follow	1:1 Meeting Se	t Price Book Add Product 👻
Account Name Close Date Amount Opportunity Megan Ames 31/03/2018	Owner es Manager ₤			
One on One     Reviewing Inf     Territory Reser     Sou	urcing Fina Offer to Purch Long	g Term Pro	Closed	✓ Mark Stage as Complete
DETAILS Megan Ames	×		ACTIVITY	CHATTER
Opportunity Own Constructive Name Opportunity Own Self-employed	18		Log a Call New 1	l:1 New Task Email
Megan Ames- 0448997335 Megan.ames@ames.com	ne Meeting		Subject	
Account Name Megan Ames	%)		Call	
Context Opportunities (1)			Comments	
Description Megan Ames- Stage: One on One Meeting	npaign Source arch			<i>h</i>
✓ 1:1 Meetir			Name	
Preferred Date 1 View All	ite 2 🕕		Related To	ntacts Q
Preferred Time 1  Preferred	Time 2 🕕		wegan Arnes-	Save

2. Make contact with the person and agree on the meeting details.

9	It could be handy to open your calendar during any phone call.
	Opportunities 🗸 Contracts 🗸 Campaigns 🗸 Territories 😋 More 💌 🖋
	Dashboards
	+ Follow 1:1 Meeting Set Price Book Reports
	Activity Templates
	Training Courses
	Calendar
	urch Long Term Pro Closed 🗸 Mark Stage as Complete

3. Record the agreed meeting time by selecting **New 1:1 Meeting**.

Franchise Recruitm         Home         Chatter	Q Search Salesforce	ttracts v Campaigns v Territories v More v 🖉
Popportunity Megan Ames-	+ Follow	1:1 Meeting Set Price Book Add Product 👻
Account Name Close Date Amount Megan Ames 31/03/2018	Opportunity Owner	
One on One Reviewing Inf Territory	Reser Sourcing Fina Offer to Purch Long Term Pro	Closed V Mark Stage as Complete
DETAILS RELATED	_	<b>ACTIVITY</b> CHATTER
Opportunity Owner	Close Date 31/03/2018	Lega Star Now 1.1 Now Tack Frazil
Opportunity Name Megan Ames-	Stage One on One Meeting	Subject
Account Name Megan Ames	Probability (%) 30%	Call
Contract 00000208	Amount	Comments
Description	Primary Campaign Source Google Search	li li
✓ 1:1 Meeting		Name
Preferred Date 1	Preferred Date 2 🕚	Related To
Preferred Time 1 0	Preferred Time 2 🕚	Megan Ames-

4. Record the meeting details.

ACTIVITY	Y CHATTER					
Log a Call	New 1:1	New Task	Email			
* Start						
Date		Time				
7/03/201	8 💼	4:00 PM	O			
*End						
Date		Time				
7/03/201	8 🛗	5:00 PM	0			
Related To Megan Ame	95-					
Location						
Sydney He	ad Office.					
Description						
Keen to m Probably ii	eet soon to dis nterested in a b	cuss the opportu pronze product.	nity.			
* Assigned To	)					
REC S	ales Manager		×			
			Save			

#### 5. Press Save.



The One on One Meeting is now recorded in the Activity Timeline. It is also entered into your Calendar.



### How to record the one on one meeting

Franchise Recruitment contains a rapid data entry page to capture all the types of information you will uncover during the one on one meeting.

To launch the One on One Meeting tool, press **1:1 Meeting**.

8			Q Search Sales	force			*	5
Franchise R	ecruitm Hom	e Chatter L	eads 🗸 Accounts	✓ Contacts ✓	Opportunities 🗸	Contracts 🗸	Campaigns 🗸 Territori	es 🗸 More 🔻 🖋
Opportunity Megan An	nes-				+ F	Follow 1:1 M	eeting Set Price Book	Add Product 🗨
Account Name Megan Ames	Close Date 31/03/2018	Amount	Opportunity Owner	ager 🔊				
One on One	Reviewing Inf	. Territory R	eser Sourcing F	ina Offer to P	Purch Long Term F	Pro Clo	osed 🗸 Mark S	Stage as Complete

The One on One Meeting form contains individual sections for the following types of information.

Form section	Description
Account Information	Personal information to review and complete
Address Information	Prospect's address details
Additional Information	Spouse and family details
Skills Information	Prospect's professional skills and current employment
Timeline Information	Purchase time frame and demonstration day booking
Territory Search	Locate territories suitable for prospect's consideration
Financial Information	Prospect's financial position
Compliance Information	Intended corporate structure of the new entity (if known)

When you complete and save the One on One Meeting form, the data is recorded into the Account, Opportunity and Contract records related to this opportunity.

## **Booking demonstration days**

A Demonstration Day is a day that the prospect spends with an existing Franchisee. It is often a key step in overcoming objections and developing the sale.

#### To select a Demonstration Day Franchise and Contact

» Select from the following fields.

-	Demonstration Day Franchise	×
•		~
	Demonstration Day Contact	
•	Paul Young	Q
	Triggers & Drivers to Investigate	
▦	Please enter triggers & drivers to investigate	
	Close Date	
	30/04/2018	曲
	<ul> <li>▼</li> <li>■</li> </ul>	

These fields look up your franchisee information.

After saving the One on One Meeting form, the agreed date, franchise and contact will be used by the Demonstration Day Referral Email. *See* "How to send automatic emails following the one on one meeting" on page 96.

#### How to use the territory search

Territory Search allows you to find salable territories that meet criteria relevant to your prospect and add them to Opportunity's **Territories of Interest** list.

To find a specific territory

- 1. Change the Operator field to Contains.
- 2. Enter the territory name in the Value field.
- 3. Press Search.

Fields	Operator	Field Or Value	Value	2	
Territory Name	Contains	Value	Newtow	wn	

The list of territories matching your search criteria now appear.

4. Select the territory, then press Add Selected.

Territory Se	arch						
	Fields Territory Name	Operator Contains	Field Or Value Value	Value Value Newtown			Ô
+ Search							
ТЕ	RRITORY NAME	TERRITORY NUMBER	COUNTRY	STATE	TYPE	STATUS	SUB STATUS
✓ Ter	rítory - Newtown	TER-422	Australia		Metro	Unowned	
Add Selected	6						

The territory is now identified as being one the possibilities under consideration for purchase by the prospect.

erritory	Search							
	Fields Territory Name	elds         Operator         Field Or Value         Value           Territory Name           Contains           Value           Newtown		â				
Search								
	TERRITORY NAME	TERRITORY NUMBER	cou	NTRY	STATE	ТҮРЕ	STATUS	SUB STATUS
•	Territory - Newtown	TER-422	Australia			Metro	Unowned	
Add Selec	cted							
TERRITO	DRY NAME	TERRITORY NUMBER	COUNTRY	STATE	TYPE	STATUS	SUB STATUS	REMOVE
Territory	- Newtown	TER-422	Australia		Metro	Unowned		Remove

You can repeat this procedure to add more territories that have potential for sale to the prospect.

There may be scenarios when you are trying to find a range of potential territories for consideration by the prospect. The system can search for a range of territories.

To find a range of territories:

1. Begin to modify any of the first three fields to broaden the search results. Press **Search**.

Territor	y Search								
+ Search	Fields State	Operator Equals	Fi	ield Or Value Value	Ŧ	Value NSW	2		â
	TERRITORY NAME	TERR	ITORY NUMBER		COUNTRY	STATE	TYPE	STATUS	SUB STATUS
	Territory - Newtown	TER-4	TER-422		Australia		Metro	Unowned	
	Territory - Erskineville	TER-4	TER-423		Australia		Metro	Unowned	
	Territory - Mascot	TER-4	•26		Australia		Metro	Unowned	

You are shown a list of territories that match this search.

2. Select and add any of the territories that may be of interest.

To find a range of territories using multiple criteria:

1. To add a further condition to the search results, press **Plus**.

Territory Sea	arch				
	Fields	Operator	Field Or Value	Value	
	State	▼ Equals	<ul> <li>Value</li> </ul>	<ul> <li>NSW</li> </ul>	<b></b>
+ Search					

A new row appears.

2. Specify your additional criteria and press Search.

In this case, we are seeing franchises available for purchase in the State of NSW that are not reserved by any other potential purchaser. Territory Search Fields Operato Field Or Valu Value Ê State Equals Value NSW 2 <mark>1</mark> Field Or Value Operator AND Equals Value Unown ĥ 8 5 4 Field Or Value AND Sub Status Does Not Equal Reserved Ê Value 6 +SUB STATUS TERRITORY NAME TERRITORY NUMBER COUNTRY STATE TYPE STATUS Territory - Newtown TFR-422 Australia Metro Unowned TFR-423 Territory - Erskineville Australia Metro Unowned Territory - Mascot TER-426 Australia Metro Unowned

You now see a list of territories that correspond with each line of criteria.

3. Select and add any of the territories that may be of interest.

#### How to record compliance information

You can optionally record Compliance Information at this stage.

Compliance Information captures the intended business structure and legal entities involved in the sale. It is included in the contract that you may form as a result of this opportunity, and is recorded in a Contract record, which was created in the background when the Lead was converted to an Opportunity.

Compliance Information	
Operating Structure	Legal Entity Name
Please enter operating structure	Please enter legal entity name
Business Number	Trading Name
Please enter business number	Please enter trading name
Company Number	
Please enter company number	

#### Remember to save

Save the information collected in the One on One Meeting record.

The collected information is now stored within the related Account, Opportunity and Contract records. The One on One Meeting page disappears and the updated Opportunity appears.

You can use **1:1 Meeting** at any time to view or update any of the details that were captured in the meeting. It's a useful tool for updating the details of the opportunity.

### Now advance the stage

You have now completed the One on One Meeting stage.

» Press Mark Stage as Complete.

Image: Standard Strength Strengt Strengt Strength Strength Strength Strength Strength Strength St	Q AA Leads ∨ Accounts ∨ Contacts ∨ Opportunities ∨ Contra	ts ∨ Campaigns ∨ * One on One Meeting ∨ × More ▼ 🖋
Opportunity Megan Ames-		+ Follow 1:1 Meeting Set Price Book Add Product V
Account Name Close Date Amount Megan Ames 31/03/2018	Opportunity Owner 중 REC Sales Manager ♪	
One on One Me     Reviewing Infor     Terri	tory Reserved Sourcing Finance Offer to Purchase Long Ter	m Pros Closed V Mark Stage as Complete
DETAILS RELATED		ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018	
Opportunity Name Megan Ames-	Stage One on One Meeting	Log a Call New 1.1 New lask Ellidii
Account Name Megan Ames	Probability (%) 30%	Create new Add
Contract 00000208	Amount	Activity Timeline
Description	Primary Campaign Source Google Search	Next Steps ····· More Steps

» The Opportunity is now placed in the **Reviewing Information** stage.

8	Q. AA	** 🖬 ? 🐥 🐻
Franchise Recruitm Home Chatter L	eads v Accounts v Contacts v Opportunities v Contracts	✓ Campaigns ✓ * One on One Meeting ✓ × More ▼
Poportunity Megan Ames-	+	Follow 1:1 Meeting Set Price Book Add Product 🗸
Account Name Close Date Amount Megan Ames 31/03/2018	Opportunity Owner	
Reviewing Infor     Territo	rry Reserved Sourcing Finance Offer to Purchase Long Term Pro	os Closed V Mark Stage as Complete
DETAILS RELATED		<b>ACTIVITY</b> CHATTER
Opportunity Owner	Close Date 31/03/2018	Log a Call New 1.1 New Task Empil
Opportunity Name Megan Ames-	Stage Reviewing Information	Log a Call New 1.1 New lask Entail
Account Name Megan Ames	Probability (%) 45%	Create new Add
Contract 00000208	Amount	Activity Timeline
Description	Primary Campaign Source Google Search	Next Steps More Steps

### How to re-assign ownership of an opportunity

Re-assigning ownership of an opportunity implies that you are re-assigning ownership of an account.

To re-assign ownership of an opportunity

1. From the **Opportunity**, click the **Account Name** link.



The Account page appears.

2. From the Show More menu list, select Change Owner.

The Change Account Owner dialog box appears.

Change Account Owner	
Search People	Q,
Transfer open opportunities not owned by you Send notification email	
The new owner will also become the owner of these records relate owned by the current record owner.	ed to <b>Phuong Ngo</b> that are
Open opportunities	
Contracts in Draft and In Approval status	
Standalone and transferred contracts' draft orders	
Contacts	
Notes and attachments	
Open activities	
	Cancel Submit

3. Search and select the new account owner, complete the dialog box as needed, and press **Submit**.

Change Account Owner

OPS Head Office Manager X
Transfer open opportunities not owned by you Send notification email
OPS Head Office Manager will also become the owner of these records related to Phuong Ngo that are owned by the current record owner.
Open opportunities
Contracts in Draft and In Approval status
Standalone and transferred contracts' draft orders
• Contacts
Notes and attachments
Open activities
Cancel Submit

## **Reviewing information stage**

Now that the One on One meeting has been conducted, it's time to review and organize the gathered information and plan the next steps.

Some of the key activities of the Reviewing Information stage are:

- » Sending One on One Meeting follow up emails
- » Assessing the financial capacity of prospect
- » Updating the estimated timeline to purchase
- » Narrowing down the possible territories of interest to a single territory and reserving the territory

### How to send automatic emails following the one on one meeting

On installation Franchise Recruitment consultants created custom email templates to help streamline your work after conducting a one on one meeting.

This section describes four types of automatic meeting follow up emails. Your implementation may have a differing number of follow up emails, depending on the needs of your business.

Franchise Recruitment uses information from your User Profile within the One on One Meeting follow up emails. Ensure that the following information on your User Profile is up-to-date:

- » Title
- » First Name
- » Last Name
- » Email
- » Mobile
- » Company Name

#### To follow up after the one on one meeting

1. From the **Opportunity Details** page, scroll down to the **1:1 Meeting Follow Up Emails**.

DETAILS RELATED			
Opportunity Owner		Close Date 31/03/2018	
Opportunity Name Megan Ames-		Stage Reviewing Information	
Account Name Megan Ames		Probability (%) 45%	
Contract 00000208		Amount	
Description		Primary Campaign Source Google Search	
✓ 1:1 Meeting			
Preferred Date 1 0 13/03/2018		Preferred Date 2	
Preferred Time 1 Evening		Preferred Time 2	
$\checkmark$ Demonstration Day Information			
Demonstration Day 🕕 No		Demonstration Day Franchise 🕚	
Demonstration Date 🚯		Demonstration Day Contact 🛛 🕼	
imes  1:1 Meeting Follow Up Emails			
Send One on One Meeting Emails 🔹 🚺		One on One Meeting Follow Up Send Date	
Send Banker Referral 🔹 🔹		Banker Referral Email Send Date 🛛 🕕	
Send Vehicle Finance Referral 🚯		Vehicle Finance Referral Email Send Date 🚯	
Send Demonstration Day Referral Email 🛛 🕦	sti <sup>2</sup>	Demonstration Day Email Send Date 🛛 🚯	

If you are going to send any of these emails, the first email must be selected. The banker, vehicle finance and demonstrate day emails are all optional, and all require the first email to be checked.

While you can send the emails all-at-once or at separate times, the One on One Meeting email will contain extra information if the banker, vehicle or demonstration day emails are sent at the same time.

2. You trigger an email by selecting the relevant check box. Press **Edit** to put the record into edit mode.

✓ 1:1 Meeting Follow Up Emails		
Send One on One Meeting Emails	One on One Meeting Follow Up Ser	nd Date 🚯
Send Banker Referral 🚯	Banker Referral Email Send Date (	•
Send Vehicle Finance Referral	Vehicle Finance Referral Email Send	Date 🕕
Send Demonstration Day Referral Email 🛛 🕕	Demonstration Day Email Send Date	•

3. Select each email as needed.

$\sim~$ 1:1 Meeting Follow Up Emails		
Send One on One Meeting Emails 🕕	5	One on One Meeting Follow Up Send Date 🛛 🚯
Send Banker Referral 1	5	Banker Referral Email Send Date 🛛 🕕
Send Vehicle Finance Referral 🕕		Vehicle Finance Referral Email Send Date  🚯
Send Demonstration Day Referral Email 🕕	5	Demonstration Day Email Send Date 🛛 🕕

4. Press Save.

Today's date is now inserted into the **Send Date** fields corresponding to your selections.

$\checkmark$ 1:1 Meeting Follow Up Emails	
Send One on One Meeting Emails	One on One Meeting Follow Up Send Date    6/03/2018
Send Banker Referral 🕕	Banker Referral Email Send Date   6/03/2018
Send Vehicle Finance Referral	Vehicle Finance Referral Email Send Date 0
Send Demonstration Day Referral Email 🔹 💿	Demonstration Day Email Send Date 0 6/03/2018

You see whether One on One Meeting follow up emails have been sent by examining the **Send Date** fields. They are not recorded in Activity History.

## How to update territories of interest

As you work through the process of identifying the final Territory to be sold, update any Territories that are now deemed unsuitable.

To exclude Territories of Interest

1. From the **Opportunity** record, select the **Related** tab.

8		Q Search C	pportunities and more			*• 🖬 ? 🐥 🐻
Franchise Recru	itm Home Cha	tter Leads 🗸 Accou	ints 🗸 Contacts 🗸	Opportunities 🗸 Co	ontracts 🗸 Campaigns 🗸	Territories 🗸 More 🔻 🤞
Opportunity Megan Ames-				+ Folk	ow 1:1 Meeting Set P	rice Book Add Product 👻
Account Name Clo Megan Ames 31	vse Date Amour /03/2018	t Opportunity Own	er <mark>Aanager</mark> ک			
$\sim$	Reviewing Inf	erritory Reser Sourci	ng Fina Offer to I	Purch Long Term Pro.	Closed	✓ Mark Stage as Complete
DETAILS RELA	ITED				ACTIVITY CH	IATTER
Opportunity Owner           Opportunity Owner           REC Sales Manager           Opportunity Name		Close Date 31/03/201 Stage	8		Log a Call New 1:1	New Task Email
Megan Ames- Account Name Megan Ames		Reviewing 1 Probability (9 45%	nformation %)		Create new	Add
Contract 00000208 Description		Amount Primary Cam Google Sea	paign Source		Activity Timeline	C Expand All
Franchise Recrui	tm Home Chai	tter Leads ✓ Accou	nts 🗸 Contacts 🗸	Opportunities V Co	ontracts 🗸 Campaigns 🗸	Territories V More V
Megan Ámes-				+ Follo	ow 1:1 Meeting Set Pr	ice Book Add Product 👻
Account Name Clo Megan Ames 31,	se Date Amoun /03/2018	t Opportunity Own	er lanager 🏖			
	Reviewing Inf	rritory Reser Sourcir	ng Fina Offer to P	Purch Long Term Pro	Closed	✓ Mark Stage as Complete
DETAILS RELA	TED				ACTIVITY CH	ATTER
Products (0)				Add Products	Log a Call New 1:1	New Task Email
Territories of In	terest (2)			New	Create new	Add
TERRITORY OF INTERE	TERRITORY NAME	PRODUCT CLASSIFICATIO	ON STATUS		Activity Timeline	
TOI-0000043	Territory - Newtown	Bronze	Under Review	<b>v</b>	Activity rimeline	
101-0000044	Territory - Biacktown	View All	Under Review	V	No next steps. To get thin	gs moving, add a task or set up a meeting.

2. From each territory's More Actions menu, select Edit.

FERRITORY OF INTERE	TERRITORY NAME	PRODUCT CLASSIFICATION	STATUS U	
TOI-0000043	Territory - Newtown	Bronze	Under Review	
TOI-0000044	Territory - Blacktown	Bronze	Under Review	•
		View All		
		View All		
ম Territories of In	iterest (2)	View All	2	Ne
Territories of In	terest (2)	View All PRODUCT CLASSIFICATION	<b>2</b> Status	Ne
Territories of In TERRITORY OF INTERE TOI-0000043	TERRITORY NAME	View All PRODUCT CLASSIFICATION Bronze	2 STATUS Under Review	Ne

The Edit Territory of Interest dialog box appears.

3. Change the Status to Excluded.

	Edit Territ	ory of Interest
	Status Under Review	Territory  Territory - Blacktown Opportunity Megan Ames-
	Excluded REC Sales Manager, 6/03/2018 11:29 AM	Last Modified By REC Sales Manager, 6/03/2018 11:29 AM
4.	Press <b>Save</b> .	
	Image: Pranchise Recruitm         Home         C           Opportunity         C         C         C	Q. Search Salesforce       Image: Contacts v       Opportunities v       Contracts v       Campaigns v       Territories v       More ▼ ✓         hatter       Leads v       Accounts v       Contacts v       Opportunities v       Contracts v       Campaigns v       Territories v       More ▼ ✓

Opportunity Megan Ames-						+ Follo	w 1:1 Meeting	g Set Price Bool	Add Produc	t 🔻
Account Name Clo Megan Ames 31	ose Date /03/2018	Amount	Opportunity Owner	ager 🖈						
	Reviewing Inf	Territory Rese	r Sourcing F	fina Offer to	Purch	Long Term Pro	Closed	✓ Ma	rk Stage as Comp	olete
DETAILS RELA	TED						ACTIVITY	CHATTER		
Products (0)					Add Pro	oducts	Log a Call	New 1:1 N	ew Task Ei	mail
Territories of Ir	nterest (2)					New	Create ne	w		Add
TERRITORY OF INTERE	TERRITORY NAME	PRODU	CT CLASSIFICATION	STATUS						
TOI-0000043	Territory - Newtow	n Bronze		Under Review	V		Activity Time	eline	T C' Expa	and All
TOI-0000044	Territory - Blacktov	wn Bronze		Excluded			Next Steps			
		Viev	v All				No next steps	. To get things movi meeting	ng, add a task or s	set up a

The selected Territory of Interest is now excluded.

#### How to reserve a territory

Once you have decided on a final territory for sale, you need to add it to the opportunity. Adding a territory to an opportunity requires:

1. Setting the price book



Price books allow you to have different prices for the same product, for example, between States or Countries. You may or may not have more than one Price Book.

See "How to set a price book" below.

#### 2. Adding the product

Products are defined through a combination of a Product class, Territory and Price. Product classes are a way to segment the value of territories, allowing you to set higher prices for more productive territories. Territories are classified by product class. Once you add a product to an opportunity you can only add a territory of that class. The price book will set a default price for the given territory but you can override the default price during negotiation. *See* "How to add a product to the opportunity" on the next page.

#### How to set a price book

Price books allow you to have different prices for the same product, for example, between States or Countries. You may or may not have more than one price book depending on choices made during implementation.

To set a Price Book

1. From the **Opportunity**, choose **Set Price Book**.

8	Q Search Salesforce	** 🖬 ? 🐥 🐻
Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸 Contacts 🗸 Opportunitie	es 🗸 Contracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Opportunity Megan Ames-		+ Follow 1:1 Meeting Set Price Book Add Product V
Account Name Close Date Amount Megan Ames 31/03/2018	Opportunity Owner	
Reviewing Inf     Territ	ory Reser Sourcing Fina Offer to Purch Lor	ng Term Pro Closed V Mark Stage as Complete
DETAILS RELATED		<b>ACTIVITY</b> CHATTER
Opportunity Owner	Close Date 31/03/2018	log a Call New 1:1 New Task Email
Opportunity Name Megan Ames-	Stage Reviewing Information	
Account Name Megan Ames	Probability (%) 45%	Create new Add
Contract 00000208	Amount	Activity Timeline
Description	Primary Campaign Source Google Search	Next Steps More Steps

The Set Price Book dialog box appears.

2. In the Price Book search field, begin entering the name of your price list.

Set Price Book	
Price Book Standard	Q
	Cancel Save

3. Select the price book from the list.



4. Press Save.

The chosen Price Book has now been set for this Opportunity.

#### How to add a product to the opportunity

An Opportunity accepts a single Product. The Product is defined as being a combination of a product class, a territory and a price.

Product classes are a way to segment the value of territories allowing you to set higher prices for more productive territories. You may only add territories belonging to the selec-
ted product class. The price book will set a default price for the given territory but you can override the default price during negotiation.

#### How to add the Product

1. From Opportunity Related tab, identify the last remaining territory that is *Under Review*, noting its Territory Name and Product Classification.

	Q Gold Territory			* 🖬 ? 🌲 👼
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V	Opportunities 🗸 Contr	racts 🗸 Campaigns 🗸 T	Ferritories 🗸 More 🔻 🖋
Poportunity Megan Ames-		+ Follow	1:1 Meeting Set Price B	Book Add Product 👻
Account Name Close Date Amount Megan Ames 31/03/2018	Opportunity Owner			
Reviewing Inf     Territory	Reser Sourcing Fina Offer to Purc	n Long Term Pro	Closed	Mark Stage as Complete
DETAILS RELATED			<b>ACTIVITY</b> CHATT	ER
Products (0)		Add Products	Log a Call New 1:1	New Task Email
S Territories of Interest (2)		New	Create new	Add
TERRITORY OF INTERE TERRITORY NAME PR	ODUCT CLASSIFICATION STATUS			
TOI-0000043 Territory - Newtown Bro	Under Review	•	Activity Timeline	T C' Expand All
TOI-0000044 Territory - Blacktown Bro	onze Excluded		Next Steps	
	View All		No next steps. To get things n mee	noving, add a task or set up a ting.

#### 2. Choose Add Product.

Opportunity Megan Ames						+ Follo	w 1:1 Meeting	g Set Price B	look Add	Product	•
Account Name C Megan Ames 3	lose Date 1/03/2018	Amount	Opportunity Owner	ager 🖍							
	Reviewing Inf	Territory Rese	er Sourcing F	Fina Offer t	o Purch	Long Term Pro.	. Closed		Mark Stage a	s Complete	
DETAILS REL	ATED						ACTIVITY	CHATT	ER		
Products (0)					Add P	roducts	Log a Call	New 1:1	New Task	Email	
Territories of 1	Interest (2)					New	Create ne	w		Add	
TERRITORY OF INTERE	TERRITORY NAME	PRODU	ICT CLASSIFICATION	STATUS							
TOI-0000043	Territory - Newtow	wn Bronze		Under Review			Activity Time	eline	<b>T</b> C'	Expand	All
TOI-0000044	Territory - Blackto	wn Bronze		Excluded			Next Steps				
		Viev	w All				No next steps	. To get things m meet	ioving, add a t ing.	ask or set u	ір а

The Add Product dialog box appears.

Add Produc	ct
Opportunity	
Megan Ames-	
* Product	
Search Products	Q
Territory 1	
Search Territories	Q
* Sales Price	
50,000.00	
	Cancel Save

3. Begin searching for the Product class of the chosen territory.

	Q
Cancel	Save
	Cancel

4. Begin searching for the Territory.

Add Product	
Opportunity Megan Ames-	
*Product	
Bronze Territory	×
Territory ()	
Newtown 🥌 🥥	Q
Q "Newtown" in Territories	
🔯 Territory - Newtown	
	Cancel Save

- 5. Accept the default Sales Price or set a new price based on your understanding of the sale.
- 6. Press Save.

Image: State of the s	Q Gold Territory	
Hanchise Recruitin Home Chatter		
Upportunity Megan Ames-		+ Follow 1:1 Meeting Set Price Book Add Product -
Account Name Close Date Amount Megan Ames 31/03/2018 \$50,000.00	Opportunity Owner	
> > -> Territory F	Reser Sourcing Fina Offer to Purch Lo	ng Term Pro Closed 🗸 Mark Stage as Complete
DETAILS RELATED		ACTIVITY CHATTER
Products (1)	Add Products Edit Prod	Log a Call New 1:1 New Task Email
PRODUCT TERRITORY SAL	ES PRICE LIST PRICE	
Bronze Territory Territory - Newtown \$50	9,000.00 \$50,000.00	Create new Add
	/iew All	Activity Timeline
S Territories of Interest (2)	ſ	New Next Steps More Steps
TERRITORY OF INTERE TERRITORY NAME PRO	DDUCT CLASSIFICATION STATUS	No next steps. To get things moving, add a task or set up a
TOI-0000043 Territory - Newtown Bro	nze Under Review 💌	meeting.
TOI-0000044 Territory - Blacktown Bro	nze Excluded 💌	Fast Activity

You have now identified the Product for sale. The selected territory is automatically set to a Reserved state and the Opportunity Stage is automatically advanced to *Ter-ritory Reserved*.

You can only add a single Product to an Opportunity. If you can sell a second franchise, manage the second sale in a separate Opportunity.

## Sourcing finance stage

When the prospect informs you they are seeking finance, advance the Opportunity from *Territory Reserved* to *Sourcing Finance*. The opportunity will remain in this stage until the search for finance has concluded.

The key activities in this stage include:

- » Ensure all information in the financial information section of the opportunity is complete.
- If you haven't already, consider providing an introduction to Banking and Vehicle finance brokers. See "How to send automatic emails following the one on one meeting" on page 96.
- **>>** When the prospect has secured finance advance the stage to Offer to Purchase.

#### To advance to the next stage

From the Opportunity, press Mark Stage as Complete. The Opportunity is advanced to the next stage.

### Offer to purchase stage

The Offer to Purchase stage is where the prospect has made an offer to purchase the franchise product. The key focus in this stage moves from the Opportunity to the Contract.

#### To create the Contract

» Select the Create Contract button

FRANCHISE CLOUD SOLUTIONS	Q Search	* 🖬 🚓 ? 🌣 🖡 🖱
Franchise Recruitm Home Chatter	Leads ∨ Accounts ∨ Contacts ∨ Opportunitie	es 🗸 Contracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Upportunity Julian Watson-		+ Follow 1:1 Meeting Set Price Book Add Prod
Account Name Close Date Amount Julian Watson 30/9/2022 AUD 130,000	Opportunity Owner Julian Christian 🖍	1 Create Contract Sharing Edit
$\rangle  \langle  \rangle  \rangle  \rangle  \rangle  \langle  \circ  \langle  \rangle  \langle  \rangle  \langle  \rangle  \langle  \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle   \circ  \langle    $	Sourcing Fin Long Term Pr NDA Sent	NDA Received Closed V Mark Sta Delete
Details Related		Activity Chatter
Opportunity Owner 👚 Julian Christian	Close Date 30/9/2022	Log a Call New 1:1 New Event More
Opportunity Name Julian Watson-	Stage Sourcing Finance	Recap your call Add
Account Name Julian Watson	Probability (%) 80%	Filters: Within 2 months • All activities • All types
Contract	Amount AUD 130,000.00	Refresh • Expand All • View All
Description	Primary Campaign Source	Vupcoming & Overdue No activities to show.
Last Territory ID a0F5j0000027qGTEAY	/	Get started by sending an email, scheduling a task, and more.
UserLookup	/	To change what's shown, try changing your filters.
Franchisor Signatory Fred Smith		Show All Activities
$ \sim $ NDA Notifications		
NDA Sent	NDA Received	

» Now click the link to go to the new Contract

FRANCHISE CLOUD SOLUTIONS		Q Search		*	8 🕹 ? 🌣 🖡 🥮
Franchise Recruitm	Home Chatter I	eads $\lor$ Accounts $\lor$ Contacts	✓ Opportunities ✓ Cont	tracts 🗸 Campaigns 🥆	🗸 Territories 🗸 More 💌 🖋
Opportunity Julian Watson-			+ Follow	1:1 Meeting Set P	rice Book Add Product 💌
Account Name Close Julian Watson 30/9/	Date Amount 2022 AUD 130,000.	Opportunity Owner			
	~	Sourcing Fin Long Term Pr	NDA Sent NDA Receiv	ved Closed	✓ Mark Stage as Complete
Details Related				Activity Chat	ter
Opportunity Owner		Close Date Create Cor	ntract	Leve Cell New 44	New Event More
Opportunity Name Julian Watson- Account Name Julian Watson	A new draft Contract has b	een created. Click <u>here</u> to be write new Co	ontract, or click Finish to return to	o the Opportunity.	All activities • All types
Contract				Finish	Refresh • Expand All • View All
Description	1	,	1	No ac	tivities to show.
Last Territory ID a0F5j0000027qGTEAY				Get started by sending	an email, scheduling a task, and more.
UserLookup				To change what's s	shown, try changing your filters.
Franchisor Signatory Fred Smith				Shor	w All Activities
✓ NDA Notifications					
NDA Sent		NDA Received			

## **Closing the opportunity stage**

Once the Franchise Agreement and required disclosure documents have been signed and returned by the prospect, update the Opportunity to *Closed – Sold*.

In the event that the sale does not complete, set the Opportunity to *Closed - Lost*.

If there is an indeterminate outcome, you can place the Opportunity in the *Long Term Prospectstage*. The Opportunity remains open.

#### To close the Opportunity

- 1. From the **Opportunity**, click on the *Closed* stage.
- 2. Press Select Closed Stage.
- 3. From the Close This Opportunity dialog box, select Closed Sold or Closed Lost.

The Opportunity is now closed and is removed from your list of open Opportunities.

Opportunity Megan A	mes-				+	Follow 1:1 Me	eeting Set Price Boo	k Add Product 👻
Account Name Megan Ames	Close Date 8/03/2018	Amount \$50,000.00	Opportunity Owner	Ŷ				
		$\rightarrow$ $\checkmark$	<b>&gt;</b> ~	> ~	> ~	Closer	d - Sold Cha	ange Closed Stage
DETAILS	RELATED					ACTIV	ITY CHATTER	
Opportunity Owner	nager		Close Date 8/03/2018			loga	all Now 1:1 N	low Task Email
Opportunity Name Megan Ames-			Stage Closed - Sold			Log a C	an 1464 1.1	
Account Name Megan Ames			Probability (%) 100%			Crea	te new	Add
Contract 00000208			Amount \$50,000.00			Activity	Timeline	▼ C <sup>4</sup> Expand All
Description			Primary Campaign Source Google Search			Next Ste	ps	

To place the Opportunity in Long Term Prospect

- 1. From the **Opportunity**, click on the Long Term Prospect stage.
- 2. Press Mark as Current Stage.

The Opportunity will remain open, allowing you to schedule follow up activities at specified intervals.

## 

S Y IJ

# Working with Contracts

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## Introducing contracts

Franchise Recruitment contracts support efficient and accurate contract generation, while maintaining the complete history of document issuance, signing and activation. Franchise Recruitment contains features that help you comply with jurisdictional codes of conduct and franchise sales best practices.

### **Contract statuses**

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

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



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.

### How to draft a contract

All contract documents are generated from a series of templates customized for your organization during implementation. You 'draft' a contract by entering all relevant contract details related to a particular opportunity.

When a Lead is converted to an Opportunity a Contract record is generated. During the one on one meeting you recorded information into the Contract record. The Territory and Master Franchise Profile fields are populated and the Product is added to the **Opportunity**.

#### To enter the contract details

1. From the Opportunity, click the Contract link.



You now see Contract Details.

8	Q Search Salesforce	* 🖬 ? 🐥 🐻
Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸 Contacts 🗸 Opportunities 🗸 C	ontracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Contract 00000207	+ Follow Create f	Franchise Profile Activate Edit Email Contract 🗸
Account Name Status Contract Start Date Bob Smith Draft 30/03/2018	Contract End Date Contract Term (months) 29/03/2020 24	
Draft Docume	nts Issued Signed	Activated V Mark Status as Complete
DETAILS RELATED		Drawloop Select Document Package
Contract Owner	Contract Number 00000207	ACTIVITY
Status Draft	Territory Territory - St Ives	
Account Name Bob Smith	Unexpired Contract Months 24	Log a Call New Event New Task Email
Type Of Agreement Initial	Master Franchise Profile FCS NSW	Create new Add
Contract Start Date 30/03/2018	Number Of Further Terms	
Contract Term (months) 24	Further Term Duration (months)	Activity Timeline
Contract End Date 29/03/2020	Commencement Date   2/04/2018	Next Steps More Steps

2. Set the **Contract Start Date** at least fourteen days into the future.

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.

3. Review and enter the relevant details for all the fields on the **Contract Details** page, including **Initial Purchase Information**, **Compliance Information**, **Address Information**, **Address Information**, **Description Information** and **System Information**.



Do not complete the **Contract Execution** section at this time.

### How to add signatories

Contracts need to describe the parties entering into the contract. To enable the franchise owner, guarantor or any other party involved in the contract, you will need to add contacts to the contract.

When your contract documents are configured for it, the contacts you add to the contract will automatically appear within the generated contract documents.

#### To add a contact to the contract

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

8	Q Search Contracts	and more		*	🗗 🗄 ? 🌲 👼
Franchise Recruitm Home	Chatter Leads 🗸 Accounts 🗸	Contacts 🗸 Opportunitie	es 🗸 Contracts 🗸	Campaigns 🗸 Territ	ories 🗸 More 🔻 🖋
Contract 00000207		+ Follow	Create Franchise Profile	Activate Edit	Email Contract
Account Name Status Contract Bob Smith Draft	t Start Date Contract End Date	Contract Term (months)			
Draft	Documents Issued	Signed	Activated	✓ Mark	Status as Complete
DETAILS RELATED			🕞 Drav	wloop Sel	ect Document Package
Contract Owner	Contract Number 00000208		ACTIVI	ТҮ	
Status Draft	Territory Territory - Newtown	<u>n</u>			
Account Name Megan Ames	Unexpired Contract M	lonths	Log a Ca	all New Event Ne	w Task Email
Type Of Agreement Initial	Master Franchise Profi	ile	Creat	e new	Add
Contract Start Date	Number Of Further Te	rms			
Contract Term (months)	Further Term Duration	n (months)	Activity T	imeline	C <sup>I</sup> Expand All
Contract End Date	Commencement Date	• 0	Next Step	ps	

2. From the Contact Roles section, press Add Contact Role.

8	Q Search Contracts and more		★ 🖬 ? 单 🐻
Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸 Contacts 🗸 C	pportunities 🗸 Contracts 🗸	Campaigns 🗸 Territories 🗸 More 🔻 🖋
Contract 00000207	4	- Follow Create Franchise Profile	Activate Edit Email Contract 🔻
Account Name Status Contract Start Date Bob Smith Draft	Contract End Date Contract Term (r	nonths)	
Draft Document:	s Issued Signed	Activated	✓ Mark Status as Complete
DETAILS RELATED		B Drav	vloop Select Document Package
DocuSign Status (0)		New	TY
🖹 Fees (0)		New Log a Ca	II New Event New Task Email
Contact Roles (0)	Ad	d Contact Role	e new Add
🖺 KPIs (0)		New Activity T	imeline   C Expand All

3. The New Contract Contact Role dialog box appears.

B 00000207	×
Contact	
Search Contacts	Q
ole	
None	▼
rimary	

New Contract Contact Role

4. Click in the Contact field and scroll down until you can see *New Contact*. Select *New Contact*.

Search Contacts	(
Kilson Phillips FCS Joondalup	
Peter Stevens FCS Mandurah	
ES Sean O'connell FCS Bondi	
Jack Franchise Owner FCS - Balmain	
E James Walker FCS - Balmain	
+ New Contact	

The **New Contact** dialog box appears.

5. Select Contact and press the Next button.

New	Contact
-----	---------

Select a record type	_ •	Franchise Contact Contact type for franchise contacts Contact Contact type for general contacts
		Cancel Next

The New Contact: Contact dialog box appears.

6. Enter the **Contact** details then press **Save**.

		-
Contact Owner		Phone
REC Sales Mariager		
*Name		Home Phone
Salutation		
Mr.	•	
First Name		
Bob		
*Last Name		
Smith		
Account Name		Mobile
Search Accounts	Q	0431661889
Title		Other Phone
Department		Fax
Birthdate		Email
	ä	b.smith@handyway.com.au
Reports To		Assistant
Search Contacts	Q	
Lead Source		Asst. Phone
None	•	
* Contact Currency		
AUD - Australian Dollar	•	
dress Information		
Mailing Address		Other Address

New Contact: Contact

7. Select the Role list.

New Contract Contact Role
---------------------------

00000207		×
* Contact		
Bob Smith		×
Role		
None		•
Primary		

8. From the list, select the Role this contact will play in the sale, then press Save.

✓None	
Franchisee Owner	
Decision Maker	
Economic Buyer	
Economic Decision Maker	9
Evaluator	4
Executive Sponsor	

New Contract Contact Role

9. The new role is added to the Contract.

All     Q     Search Contracts and more       III     Franchise Recruitm     Home     Chatter     Leads     Accounts     Contracts     Opportunities     Contracts	tts v Campaigns v Territories v Morev 🖌
Contract Contract Contract Franchise Profile Account Name Bob Smith Draft Create Franchise Profile Contract End Date Contract Term (months)	Create Variation Create Renewal Cease Contract
Draft Documents Issued Signed Act	Mark Status as Complete       Complete       Complete       Select Document Package
E Fees (0) New	ACTIVITY
KPIs (0)      Kew	Log a Call New Event New Task Email
Bob Smith     Role: Franchisee Owner     Title:     Primary:	Create new Add

You have now added a **Contact** and **Role** to the **Contract**.

Add as many other Contact Roles as you need to the Contract.

### How to insert a custom fee schedule

Franchise Recruitment allows you to specify a range of custom fees as part of a franchise contract. You can specify:

- » A once-off or recurring fee sequence
- » Fixed fees
- » Royalties

To add a custom fee

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

	Q Search Contracts and more	
••• Handhise Recruitin Home chatter		
Contract 00000207	+ Follow Create Fra	anchise Profile Activate Edit Email Contract 🗸
Account Name Status Contract Start Date Bob Smith Draft	Contract End Date Contract Term (months)	
Draft Documents	Issued Signed	Activated V Mark Status as Complete
DETAILS RELATED		B Drawloop Select Document Package
Contract Owner	Contract Number 00000208	ACTIVITY
Status Draft	Territory Territory - Newtown	
Account Name Megan Ames	Unexpired Contract Months	Log a Call New Event New Task Email
Type Of Agreement Initial	Master Franchise Profile FCS NSW	Create new Add
Contract Start Date	Number Of Further Terms	
Contract Term (months)	Further Term Duration (months)	Activity Timeline        The second seco
Contract End Date	Commencement Date 🕚	Next Steps More Steps

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

8		Q Search Contracts a	and more			★•   ? 4	
Franchise Recruitm	Home Chatter	Leads 🗸 Accounts 🗸	Contacts 🗸 Opportunities	✓ Contracts ✓	Campaigns 🗸 🗆	Territories 🗸 More	•
Contract 00000208			+ Follow	Create Franchise Profile	Activate Ec	dit Email Contract	•
Account Name Status Megan Ames Draft	Contract Start Date	Contract End Date	Contract Term (months)				
Draft	Documents	Issued	Signed	Activated		Mark Status as Compl	ete
DETAILS RELATED				<table-cell> Drav</table-cell>	vloop	Select Document Pac	kage
👱 DocuSign Status (0)			Ne	W ACTIVI	ТҮ		
🖺 Fees (0)			Ne	w Log a Ca	New Event	New Task Em	ail
Contact Roles (0)			Add Contact Ro	Creat	e new	Ad	ld

The **New Fee** dialog box appears.

Complete all the mandatory fields and as many of the optional fields as needed.

- » See "To add a once-off or recurring fee sequence" on the next page
- » See "To add a fixed fee" on the next page
- » See "To add a royalty" on the next page
- 3. Enter details to suit the type of fee you are wanting to specify, then press **Save**.

The new fee is added to the Fees schedule.

Image: State Sta	ruitm Home Chatt	Q Search Con er Leads ✓ Account	s	Opportunities 🗸 Co	ontracts 🗸 Campaigns 🗸	★▼     ●     ?     ●     ●       Territories     ∨     More     ✓
Contract 00000208	Status Contract Start Di Draft	ite Contract End Da	te Contract Terr	+ Follow Create Fi	ranchise Profile Activate	Edit Email Contract 🗸
Draft	Docur	ments Issued	Signed		Activated	Mark Status as Complete  Salact Document Package
DocuSign Sta	atus (0)			New		Select Document Package
Fees (1)	ТҮРЕ	CALCULATION TYPE	AMOUNT INC TAX	New	Log a Call New Ever	nt New Task Email
Fee-000125	Software Subscription	Fixed View All	\$500.00	•	Create new Activity Timeline	Add       C'     Expand All

To add a once-off or recurring fee sequence

- 1. Specify the periodicity for the fee calculation by selecting from the Cycle list.
- 2. If this fee is to be charged only a certain number of times, specify the End Date.

To charge a once-off fee, set the same Start Date and End Date.

#### To add a fixed fee

- 1. From Calculation Type select Fixed.
- 2. Enter a monetary value in Amount Inc Tax.
- 3. Enter a Quantity.

#### To add a royalty

- 1. From Calculation Type select Royalty.
- 2. Choose whether the Royalty Source is provided by Invoice or POS.
- 3. Enter a Royalty Rate in the range 0.01 through 100.00.

### How to specify contract targets

Franchise contracts often require the achievement of certain performance targets. These are known as Key Performance Indicators (KPIs). Franchise Recruitment allows you to describe custom KPI targets and include them in the franchise contract.



A common franchise KPI target would be to require a certain volume of revenue within a certain time frame.

#### To add a custom KPI target

#### 1. From the **Contract**, open the **Related** tab.

Image: Standard	ome Chatter Lead	<ul> <li>Q Search Contracts and more</li> <li>Is V Accounts V Contacts</li> </ul>	: 🗸 Opportunities 🔨	✓ Contracts ✓ C	Campaigns 🗸 Te	🖈 🖬 ? 🌲 🐻
Contract 00000207			+ Follow C	reate Franchise Profile	Activate Edi	t Email Contract 🚽
Bob Smith Draft	Documents Issue	ed Signe	d	Activated	✓ M	ark Status as Complete
DETAILS RELATED				<table-cell> Draw</table-cell>	loop	Select Document Package
Contract Owner		Contract Number 00000208		ACTIVIT	Y	
Status Draft		Territory Territory - Newtown				
Account Name Megan Ames		Unexpired Contract Months		Log a Cal	New Event	New Task Email
Type Of Agreement Initial		Master Franchise Profile FCS NSW		Create	new	Add
Contract Start Date		Number Of Further Terms				
Contract Term (months)		Further Term Duration (months)		Activity Tir	meline	C Expand All
Contract End Date		Commencement Date 0		Next Step	s	

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

8	Q Search Salesforce			*• 🖬 ? 🖡 🐻
Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸 Conta	acts 🗸 Opportunities 🗸	Contracts V Campaigns V	Territories 🗸 More 🔻 🖋
Contract 00000208		+ Follow Create	e Franchise Profile Activate	Edit Email Contract 🖵
Account Name Status Contract Start Date           Megan Ames         Draft	Contract End Date Co	ntract Term (months)		
Draft Documents	Issued S	igned	Activated	<ul> <li>Mark Status as Complete</li> </ul>
DETAILS <b>RELATED</b>			Drawloop	Select Document Package
DocuSign Status (0)		New	ACTIVITY	
🖺 Fees (0)		New	Log a Call New Even	t New Task Email
Contact Roles (0)	_	Add Contact Role	Create new	Add
🖺 KPIs (0)		New	Activity Timeline	C <sup>4</sup> Expand All

The New KPI dialog box appears.

New KPI			
Information			
KPI Number *Contract			×
*Target Date			
Description			
$\begin{array}{c ccccccccccccccccccccccccccccccccccc$			
System Information			
Currency			
Australian Dollar 🔹			
	Cancel	Save & New	Save

3. Enter a Target Date by which the KPI target should be achieved.

Nev	v KPI
Information	
KPI Number	*Contract
* Target Date	
1/10/2018	
* Description	
	2 🖪 I.
System Information	
Currency	
Australian Dollar 🔹	
	Cancel Save & New Save

4. Enter the description of the KPI target into the Description field.

New KPI

Information		
KPI Number	*Contract	
	6 0000208	
* Target Date		
1/10/2018		
* Description		
	2 🖪 Ix	
Exceed \$150,000 in sales invoices.		
System Information		
Currency		
Australian Dollar		

5. Press **Save**. The new KPI target is now added to the **Contract**.

⑧ ↓ Franchise Recruitm	Q         Search Salesforce           Home         Chatter         Leads ↓         Accounts ↓         Contacts ↓	✓ Opportunities ✓ Contracts ↔ Contracts ↔ Contracts ↔ Contracts ↔ Contract	Campaigns 🗸 Territories 🗸 More 🗸 🌶
Contract 00000208	Contract Start Date Contract End Date Contract	+ Follow Create Franchise Profile Term (months)	Activate Edit Email Contract 🗸
Draft	Documents Issued Signed	Activated	✓ Mark Status as Complete
DETAILS RELATED		R Draw	Select Document Package
DocuSign Status (0)		New	ſY
🖺 Fees (0)		New Log a Ca	II New Event New Task Email
Contact Roles (0)		Add Contact Role Create	Add
🖺 KPIs (1)		New Activity Ti	meline   C <sup>t</sup> Expand All
KPI NUMBER		Next Step	More Steps
NFI-00030	View All	No next st Past Activ	eps. To get things moving, add a task or set up a meeting. ity

### How to generate contract documents

When you are satisfied that all relevant information has been entered on the **Contract** record, you can start the document generation.



During implementation a Franchise Cloud Solutions consultant will work with you to develop a custom document package.

You may have more than one document package available. Ensure you know which document package you need to use.

#### To start document generation

1. From the Contract, press Select Document Package.

Contract 0000020	17				+ Follow	Create F	ranchise Profile	Activate	Edit	Email Contra	ct 🗨
Account Name Bob Smith	Status Draft	Contract Start Date 30/03/2018	Contract End Date 29/03/2020	Contract Ter 24	m (months)						
Dr	aft	Documents Issu	red	Signed			Activated		🗸 Mark	Status as Com	nplete
DETAILS	RELATED						<table-cell> Drawle</table-cell>	оор	Sel	ect Document F	Package
Contract Owner	anager		Contract Number 00000207				ACTIVITY	(			
Status Draft			Territory Territory - St Ives								
Account Name Bob Smith			Unexpired Contract Mont 24	hs			Log a Call	New Eve	nt Ne	ew Task E	Email
Type Of Agreement Initial			Master Franchise Profile				Create r	new			Add
Contract Start Date 30/03/2018			Number Of Further Terms 1 (One)								
Contract Term (mor 24	nths)		Further Term Duration (m 24	onths)			Activity Tim	neline		C' Exp	and All
Contract End Date 29/03/2020			Commencement Date ( 2/04/2018	•			Next Steps	os. To got thir		Mor	e Steps

One or more **Document Packages** appear.

E Drawloop	
<ul> <li>Document Package</li> </ul>	Q
Contract Documents	
Email Contract	
Email Contract (DocuSign)	
Run Document Pa	ackage

2. Select the **Document Package** you need to generate.



Once you have clicked on the document package, the **Contact** pane opens revealing a list of contacts.

3. Select the Contact matching the person appearing in the Account Name field.

Contract 00000207				+ Follow	Create Fra	inchise Profile	Activate	Edit	Email Contract
Account Name Status Bob Smith Draft	Contract Start Date 30/03/2018	Contract End Date 29/03/2020	Contract Term 24	(months)					
Draft	Documents Issu	ued	Signed			Activated		🗸 Mark	Status as Complete
DETAILS RELATED						🗟 Drawl	оор		
Contract Owner		Contract Number 00000207				> Documen	t Package		CONTRACT DOCUMENTS
Status Signed	/	Contract Version Number				✓ Contact			Q
Account Name Bob Smith	1	Territory Territory - St Ives				Non	e		
Type Of Agreement Initial		Master Franchise Profile FCS NSW							
Contract Start Date 30/03/2018		Purchase History   PH-000027				Bob b.sm	Smith ith@handywa	y.com.au	
Contract Term (months) 24		Number Of Further Terms 1 (One)				L= Marl	ene Smith		
Contract End Date 29/03/2020		Further Term Duration (me 24	onths)						
		Unexpired Contract Month 24	hs			> Documen	t Selection		
		Commencement Date ( 2/04/2018				> Delivery C	ption		REQUIRED

4. Select each document you need to generate, then press Next.

民 Drawloop	
> Document Package CONTRACT D	DCUMENTS
> Contact	BOB SMITH
<ul> <li>Document Selection</li> </ul>	Q
Franchise Agreement Optional Document	~
Professional Advice Report Optional Document	~
Document Receipt Optional Document	
Schedule 1 - All Current Franchisees Optional Document	
Schedule 2 - Ceased Franchisees Optional Document	
Schedule 3 - Pre Owned Territory Optional Document	
	Next
> Delivery Option	REQUIRED
Run Document	Package

5. Select the **Download** delivery option, then press **Run Document Package**.



The document package shows a progress bar as it generates the documents.

民 Drawloop					
> Document Package	CONTRACT DOCUMENTS				
> Contact	BOB SMITH				
> Document Selection	SELECTED				
> Delivery Option	DOWNLOAD				
40%					
acquiring data					

You may have the choice of Download and Email delivery options.

6. When the document generation is complete, select each document you wish to download.





You can select each document in rapid succession. Each will begin to download as soon as it is ready.

7. When the documents have downloaded, you can find them in your web browser's default Downloads folder.



### How to issue contract documents

Contract documents can be issued via email or manually.

To issue documents via email

1. From the **Contract**, press **Email Contract**.

Contract 0000020	17				+ Follow	Create F	ranchise Profile	Activate	Edit	Email Contract	•
Account Name Bob Smith	Status Draft	Contract Start Date 30/03/2018	Contract End Date 29/03/2020	Contract Te 24	erm (months)						
Dr	aft	Documents Issu	led	Signed			Activated		Mark	Status as Comple	ete
DETAILS	RELATED						🔒 Drawlo	ор			
Contract Owner	anager		Contract Number 00000207				Document	t Package	Com	plete	
Status Draft			Territory Territory - St Ives					0207 - Marc	:h 13, :	2018 - Franchis	se
Account Name Bob Smith			Unexpired Contract Mon 24	iths				0207 Marc	-h 12 -	2018 Brofossi	onal
Type Of Agreement Initial			Master Franchise Profile FCS NSW				Advic	e Report.do	сх	2010 - PIOlessi	Una
Contract Start Date 30/03/2018			Number Of Further Term 1 (One)	IS			Start	Modify		Re-run Documen	t
Contract Term (mor 24	nths)		Further Term Duration (r <b>24</b>	nonths)			Over	Run		Package	
Contract End Date 29/03/2020			Commencement Date 2/04/2018	0			ACTIVITY				

An email details page appears.

2. Select the recipient Contact, the Optional Documents and the relevant Attachments, then press Run.

CONTRACT 00000207	4	
« BACK TO CONTRACT	~ U	
On this page you can select a contact (	(if applicable), select a Document Package to run, and choose how you want to deliver the D	Jocument Package.
1. Specify the contact for the Docur Bob Smith \$	ment Package:	
2 Select Optional Documents to Include Pranchising Code of Conduct 2 Information Statement	Attachments: 2 0000207 - March 9, 2018 - Franchise Agreement.docx (Contract) 2 0000207 - March 9, 2018 - Professional Advice Report.docx (Contract) 2 0000207 - March 9, 2018 - Schedule 1 - All Current Franchisees.docx (Contract) 3 0000207 - March 9, 2018 - Schedule 2 - Ceased Franchisees.docx (Contract) 3 0000207 - March 9, 2018 - Schedule 3 - Ore Development Contract) 3 00000207 - March 9, 2018 - Schedule 3 - Pre Owned Territory Letter.docx (Contract) 3 0000207 - March 9, 2018 - Schedule 3 - Pre Owned Territory Letter.docx (Contract)	
<ul> <li>Choose a delivery method for the Docu</li> <li>Email</li> <li>Run</li> <li>Cancel</li> </ul>	ment Package:	

The system mail merges the documents, converts them to PDF, and then presents you with a **Send an Email** page.

Ű

Attachments can include documents you have edited outside the system and uploaded to Salesforce via the **Contract Related** tab's **Notes and Attachments** field. 3. Review all the relevant fields, edit the standard email body as needed and review the attachments. When you are ready, press **Send**.

Send	an Email	
	From "Franchise Cloud Solutions" <hello@franchisecloudsolutions.com> To</hello@franchisecloudsolutions.com>	
	Contact 🗘 Bob Smith Q	
	Related To	
	Contract \$ 00000207 Q	
	Additional To	
	сс	
	BCC	
	*	
	Subject	
	Franchise Agreement Documents	
	Body	
	FRANCHISE CLOUD SOLUTIONS	
	Dear Bob,	
	Please find the attached franchise sales agreement documents for your	
	review and signature.	
	Please feel free to reach out if you have any queries.	
	Thank you,	
	Cancel Send	
tachments		
tion	File	Size
el	File - Franchising Code of Conduct.pdf	781 KB
el	File - Information Statement For Prospective Franchisees.pdf	56 KB
el	File - 00000207 - March 9, 2018 - Franchise Agreement.pdf	80 KB
el	File - 00000207 - March 9, 2018 - Professional Advice Report.pdf	160 KB

Del	File - 0000207 - March 9, 2018 - Schedule 1 - All Current Franchisees.pdf	266 KB
Del	File - 00000207 - March 9, 2018 - Schedule 2 - Ceased Franchisees.pdf	180 KB
Del	File - 0000207 - March 9, 2018 - Document Receipt.pdf	154 KB
Del	File - 00000207 - March 9, 2018 - Schedule 3 - Pre Owned Territory Letter.pdf	86 KB

4. The system automatically advances to the **Documents Issued** status and sets the Documents Issued date.

Contract 0000020	7			+ Follow	Create F	Tranchise Profile Activate	Edit Email Contract 👻
Account Name Bob Smith	Status Documents Issued	Contract Start Date 30/03/2018	Contract End Date 29/03/2020	Contract Term 24	(months)		
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	·	Documents Issued	Signed			Activated	✓ Mark Status as Complete
DETAILS	RELATED					民 Drawloop	Select Document Package
Contract Owner Contract Owner Status Documents Issue Account Name Bob Smith Type Of Agreement Initial Contract Start Date 30/03/2018 Contract Term (mor 24	anager d ths)	Contr 0000 Territu Unex 24 Maste FCS I Numi 1 (Or Furth 24	act Number 20207 27Y Cry - St Ives 20207 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 2027 20			ACTIVITY Log a Call New Ev Create new Activity Timeline	ent New Task Email Add    C Expand All
Contract End Date 29/03/2020		Comr 2/04	nencement Date 🕚			Next Steps	More Steps
ď	lf any key fi reset to dra	elds are ed ft and the D	ited after the	docum	<b>ents</b> Date	are issued, t	the contract is

To issue documents manually

- 1. Download the documents (*See* "How to generate contract documents" on page 127) then issue them outside the system.
- 2. Advance the contract to the *Documents Issued* stage. Select Documents Issued then press Mark as Current Stage.

Contract 00000208				+ Foll	ow	Create Franchise Profile	Activate	Edit	Email Contract	•
Account Name Megan Ames	Status Draft	Contract Start Date	Contract End Date	Contract Term (month	s)	2				
Draft		Documents Iss	sued	Signed		Activated		Mark	as Current Status	

### How to sign issued contract documents

Document signing is performed outside the system, and the Contract record is updated to reflect progress.

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.

#### To sign the contract documents

- 1. Sign the documents outside the system.
- 2. In the Contract Details tab's Contract Execution section, enter the Customer Signed Date and Customer Signed By fields.

Documents Issued Date	Customer Signed Date 27/03/2018	
Contract Execution		

3. Press Mark Status as Complete. The Contract advances to the *Signed* status.



### How to create a franchise profile account

Once the Contract has been signed, you will want to convert the Contract information into a Franchise Profile Account. The Franchise Profile Account forms the trading account the new franchise owner will use for their business.

#### To create a new Franchise Profile

1. From the Contract, press Create Franchise Profile.

		Q Search Contracts and more		★ <b>▼</b> 目 ? 攻 ≜	6
Contract 00000207	me Chatter Leads	Accounts     Contacts     + 1	Opportunities Contract     Contract     Contract     Create Franchise Profile	e Create Variation Create Renewal Cease Contract	t
Account Name Status C Bob Smith Signed 3	iontract Start Date 0/03/2018	Contract End Date Contract 29/03/2020 24	t Term (months)		
$\langle \cdot \rangle$	Sign	ed Activated	Deactivation in Prog	Deactivated V Mark Status as Complete	
DETAILS RELATED				B Drawloop Select Document Package	3
Contract Owner		Contract Number 00000207		ACTIVITY	
Contract Name - Territory - St Ives		Contract Version Number			
Status Signed		Territory Territory - St Ives		Log a Call New Event New Task Email	
Account Name Bob Smith		Master Franchise Profile FCS - NSW		Create new Add	
Type Of Agreement Initial		Purchase History  BH-000027		Eilters: All time + All activities + All types	
Contract Start Date 30/03/2018		Previous Contract		Refresh Expand	All
Contract Term (months) 24		Number Of Further Terms 1 (One)		Next Steps More Steps	
Contract End Date 29/03/2020		Further Term Duration (months) 24		No next steps. To get things moving, add a task or set up a meeting	а
Unexpired Contract Months 24				Past Activities	

The Create Franchise Profile confirmation dialog box appears.

Create Franchise Profile	
You are about to create a Franchise Account and Contact.	
	Cancel OK

2. Press **OK** to see the new Account.

<b>®</b>		Q Search Salesforce		*• 🖬 ? 单 🐻
Franchise Recruitm	Home Chatter Li	eads V Accounts V Contacts	✓ Opportunities ✓	Contracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Account Territory - St Ives				+ Follow Edit Delete View Account Hierarchy
Billing Address Status 12 Myrtle Street Inactive St Ives NSW 2075 Australia	Status Reason			
DETAILS RELATED				<b>ACTIVITY</b> CHATTER
Account Name Territory - St Ives		Account Owner		Log a Call New Event New Task Email
Parent Account		Email		
Status Inactive		Phone 0431661889		Create new Add
Timezone		Fax		Activity Timeline
Next Review Due Date				Next Steps More Steps
Next Review Date				No next steps. To get things moving, add a task or set up a meeting.
✓ Business Information				Past Activity
Legal Entity Name Shortbridge Trading		Business Number 49 8887 3382929		No past activity. Past meetings and tasks marked as done show up here.
Trading Name FCS St Ives		Company Number		Load More Past Activities
Operating Structure Pty Ltd Company				

The Franchise Profile copies across all the key details from the Contract.

Franchise Recruitment also creates a new Contact for the franchise owner. You can see this Contact on the **Related** tab. Franchise Recruitment copies the contact details into this new contact record.

To ensure you're using the new Contact record in the future, you can always access it from the Contacts list view named "All Franchise Contacts".

3. Modify any fields that have different values for the on-going operation of the franchise and press **Save**.

For more information about managing accounts, *See* "Working with Accounts" on page 139.

### How to activate a contract

When the contract has been signed and has become effective, Franchise Recruitment will automatically move the **Contract** into the *Activated* status.



###
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# Working with Accounts

Overview of account types	140
When a franchise opportunity turns out to be an employment can-	
didate	142

# **Overview of account types**

Franchise Recruitment uses accounts to record information about prospective franchisees, prospective employees, franchise businesses and master franchise businesses.

Account type	Purpose within Franchise Recruitment					
Franchise Sales	A prospect qualified for the purchase of a franchise license.					
Business Account	To represent a prospect that will be purchasing the franchise under a company name.					
	This is rarely used. In most cases where a company is the legal entity performing the purchase a Franchise Sales account is still preferable.					
Employment Candidate	People who may be considered for employment within the franchise network.					
Franchise Pro- file	The business account of an operating franchise.					
Master Franchise Pro- file	The business account of a master franchise.					

Most accounts are created automatically through the use of Franchise Recruitment capabilities. Here is a summary of how each account type came to be created.

Account type	How an account is typically created
Franchise Sales	On conversion of a Lead to an Opportunity. <i>See</i> "How to convert a lead into an opportunity" on page 74.
Business Account	In the rare cases a Business Account is created, it is created manually and attached to a Contract.
Employment Candidate	Converted from a Franchise Sales Account into an Employment Can- didate Account. <i>See</i> "When a franchise opportunity turns out to be an employment candidate" on page 142.
Franchise Pro- file	The business account of an operating franchise business. <i>See</i> "How to create a franchise profile account" on page 135.
Master Franchise Pro- file	The business account of a master franchise business. Typically cre- ated during implementation or by an administrator.

# Ľ

Once the Franchise Profile is created (*See* "How to create a franchise profile account" on page 135), on-going account management functions are normally handled within the Franchise Operations product.

# When a franchise opportunity turns out to be an employment candidate

Most employment candidates are identified during the Lead stage and are made an Employment Candidate Lead. Occasionally during the sales process, someone who initially inquires as a Franchise Sales Lead may not be suitable to purchase a franchise, however might make an ideal employment candidate. When this occurs, the sales representative can convert the Account to an Employment Candidate record type.

Treat this account type as an extension of the Employment Candidate Queue. You will need to determine your internal process for working with potential employees.

To convert a Franchise Sales Account into an Employment Candidate Account:

1. From the Account of type Franchise Sales, press Change Record Type.

8				Q	Search Sal	esforce								* -	8	? 4	6
***	Franchise	Recruitm H	Home Chatter	Leads	✓ Accoun	ts 🗸	Contacts	~	Opportunities	~	Contracts 🗸	Campaigns	~	Territories	~	More	• 🖉
F2	Account Phuong	Ngo									+ Follow	Delete	Edit	Change	Reco	rd Type	•
Posi Pair	tion Iter	Current Employer M.J.Harris Painting	Mobile 0404778678	l	Email phuong.ngo	@gmail	.com					-					

The Change Account Record Type dialog box appears. The selection within this box is already "switched" from the current type to the "other" type of record.

Change Account Record Type

Existing pick manually.	Existing picklists aren't updated when record types change. You'll need to change picklist values manually.						
Sele	ect a record type for	Phuong Ngo					
Å	Available record types	<ul> <li>Franchise Sales         <ul> <li>Person Account Record type for Franchise Sales</li> </ul> </li> <li>Employment Candidate         <ul> <li>Employment Candidates</li> </ul> </li> </ul>					
		Cancel Next					
When the account type is Franchise Sales, the Change Account Record Type dialog box will appear with Employment Candidate selected.							

2. To convert the Franchise Sales Account into an Employment Candidate Account, press **Next**. The Edit Account dialog box appears.

	Edit A	ccount		
Account Information				
* Assessment Manua		Account Owner		
Salutation		REC Sales Manager		
None	•			
First Name				
Phuong				
* Last Name				
Ngo				
Mobile		* Initial Contact Date		
0404778678		13/03/2018		苗
Email				
phuong.ngo@gmail.com				
Next Review Due Date				
	苗			
6 Wonga Road Mailing Suburb	// Mailing State			
Ringwood	VIC			
Mailing Postcode	Mailing Country			
3134	Australia			
Marketing Information				
Preferred Communication Channel		Unsubscribe		
Email	•			
		SMS Unsubscribe 🕚		
Additional Information				
		C		
* Area of Interest		Country of Interest		
Area of Interest     Buy a Franchise	•	Australia		•
*Area of Interest Buy a Franchise Latest Closed Sold Date	•	Australia State of Interest ()		•

3. Review and edit the relevant information. When you are ready to make the conversion, press **Save**.

The Account is now of type Employment Candidate.

# 

# Supporting the Sales Process

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# Working with prospects on the phone

Franchise Recruitment provides a range of tools for sales representatives and sales support team members to be able to quickly and easily field prospect requests. The following topics deal with a range of tasks common to Opportunity, Account or Lead records, encompassing taking notes, creating follow up tasks, sending emails, and scheduling meetings.



When recording new leads over the phone, *See* "Manually created leads" on page 48.

# How to locate the right record

When a prospect not new to your business contacts you, you need to locate the right record so that you can record new information and update existing information in the right place.

#### To locate a person's record

1. Ask for the person's name. Enter their name into the Salesforce search box.

<b>®</b>	Q megan	j 🖬 ? 🖡 🐻
Franchise Recruitm Home Chatter Le	A "megan"	racts 🗸 Campaigns 🗸 Reports 🗸 More 🔻 🖋
Quarterly Performance	Megan Ames     Account	Assistant
CLOSED AUD 130,000 OPEN (>70%) AUD 130,000	Megan Ames	> U Opportunity has overdue tasks
300к	Poportunity	> Upportunity has no open x
200к —	Megan Ames Contact	> 20 days without any activity X Bob Smith-
	Contact · Megan Ames	> Yange 30 days without any activity Xana Smith-
100к -		> 🔛 30 days without any activity X
0	Mar Closed + Open (>70%)	

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

2. If there is an **Opportunity** record, try that one first. Select the **Opportunity**.

<b>®</b>	Q megan	Ar 🖪 ? 🖡 🐻
Franchise Recruitm Home Chatter Le	Q "megan"	racts 🗸 Campaigns 🗸 Reports 🗸 More 🔻 💉
Quarterly Performance	Megan Ames  Account	Assistant
CLOSED AUD 130,000 OPEN (>70%) AUD 130,000	Hegan Ames Lead	>  Opportunity has overdue tasks John Brown-
300к	Opportunity	> P Opportunity has no open x
200к	Megan Ames Contact	> 30 days without any activity ×
	Megan Ames     Contact • Megan Ames	> 🍟 30 days without any activity 🗙
100к —		>      30 days without any activity     Phuong Ngo-
0 Jan Feb Closed Goal		

3. Check the Opportunity stage. If the Opportunity stage is closed, then click on the Account Name link and record the information in the related Account.

Image: Standard Strength Strengt Strengt Strength Strength Strength Strength Strength Strength St	Q megan Leads V Accounts V Contacts V Opportunitie	s v Contracts v Campaigns v Reports v More v 🖍
Upportunity Megan Ames-		+ Follow 1:1 Meeting Set Price Book Add Product V
Account Name Close Date Amount Megan Ames 8/03/2018 \$50,000.00	Opportunity Owner	1
$\bigcirc (                                   $	$\sim$ $\rangle$ $\sim$ $\rangle$ $\sim$ $\rangle$	Closed - Sold Change Closed Stage
DETAILS RELATED		<b>ACTIVITY</b> CHATTER
Opportunity Owner	Close Date 8/03/2018	Log a Call New 1-1 New Tack Email
Opportunity Name 2	Stage Closed - Sold	
Account Name Megan Ames	Probability (%) 100%	Create new Add
Contract 00000208	Amount \$50,000.00	Activity Timeline 🔻 C <sup>4</sup> Expand All
Description	Primary Campaign Source Google Search	Next Steps More Steps

If the Opportunity stage is not closed, then record the information in the Opportunity record.

8	Q alexander	** = ? + 🐻
Franchise Recruitm Home Chatt	ter Leads V Accounts V Contacts V Opportunities	S 🗸 Contracts 🗸 Campaigns 🗸 Reports 🗸 More 🔻 🖋
Mr. Alexander Ivanov-		+ Follow 1:1 Meeting Set Price Book Add Product V
Account Name Close Date Ame Alexander Ivanov 31/03/2018	ount Opportunity Owner	
One on One Reviewing Inf Ten	ritory Reser Sourcing Fina Offer to Purch Long	g Term Pro Closed 🗸 Mark Stage as Complete
DETAILS RELATED		ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018	Logo Coll New 1.1 New Tark Empil
Opportunity Name Mr. Alexander Ivanov-	Stage One on One Meeting	
Account Name Alexander Ivanov	Probability (%) 30%	Create new Add
Contract 00000212	Amount	Activity Timeline
Description	Primary Campaign Source	Next Steps ····· More Steps

4. If there is no Opportunity or Account record, select the Lead.

Q   andreas	) 🖂 🖬 ? 🌲 (	6
Franchise Recruitm Home Chatter Le: Q "andreas"	racts 🗸 Campaigns 🗸 Reports 🗸 More 🔻	
Quarterly Performance Radress Fotos	Assistant	
CLOSED AUD 130,000 OPEN (>70%) AUD 130,000 GUAL	> Rew lead assigned to you today Andreas Fotos	×
300к	> U Opportunity has overdue tasks	×
200к —	>      Opportunity has no open     activities	×
	> U 30 days without any activity Mr. Alexander Ivanov-	×
100ĸ	> U 30 days without any activity Bob Smith-	×
0	> U 30 days without any activity	×
Jan Feb Mar Closed Goal Closed + Open (>70%)	> Yange 30 days without any activity Phuong Ngo-	×

5. If the person's name does not appear on an **Opportunity**, **Account** or **Lead**, then they are likely a new customer.



# How to capture the outcomes of phone calls

When a prospect or prospect calls and leaves a message, sometimes you just need to record information and other times someone needs to follow up the call.

#### To record information

- 1. Locate the Opportunity, Account or Lead. *See* "How to locate the right record" on page 188.
- 2. From the Activity pane's Log a Call tab, press Create new...

8	Q Search Leads and more	*• 🖬 ? 单 👼
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Co	ontracts 🗸 Campaigns 🥆 Territories 🗸 More 🔻 🖋
Andreas Fotos		+ Follow Edit Delete Change Owner V
Position Current Employer Mobile Carpenter Self-employed 048879864	Email 4 andreas.fotos@hotmail.com	
New Contacted	In Progress Exhausted	Converted V Mark Status as Complete
DETAILS RELATED		ACTIVITY CHATTER
✓ Lead Information		
Name Andreas Fotos	Lead Owner	Log a Call New Event New Task Email
Mobile 0488798644	Lead Status New	Create new Add
Email andreas.fotos@hotmail.com	Lead Source Other	Activity Timeline
Position Carpenter	Initial Contact Date 🔹	Next Steps ····· More Steps
Current Employer 🕕	Hours Since Creation (1) 4.00	> 🔚 Request for more inform Today 💌
Area of Interest ① Buy a Franchise	Days To Contacted 🔹	You have an upcoming Task
Preferred Communication Channel 0		Past Activity

The Log a Call activity pane displays.

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

8		Q Search Leads and more		*• 🖬 ? 🜲 🐻
Franchise Recruitm	Home Chatter Lead	ds 🗸 Accounts 🗸 Contacts 🗸 Opportur	ities 🗸 Cont	racts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Andreas Fotos				+ Follow Edit Delete Change Owner V
Position Current Employer Carpenter Self-employed	Mobile 0488798644	Email andreas.fotos@hotmail.com		
> New	Contacted	In Progress Exhausted		Converted  ✓ Mark Status as Complete
DETAILS RELATED				ACTIVITY CHATTER
$\checkmark$ Lead Information				
Name Andreas Fotos		Lead Owner		Log a Call New Event New Task Email
Mobile 0488798644		Lead Status New		Returned your call
Email andreas.fotos@hotmail.com		Lead Source Other		Comments
Position () Carpenter		Initial Contact Date 🕚		Yes tomorrow is fine.
Current Employer		Hours Since Creation (1) 4.00		Name Andreas Fotos
Area of Interest  Buy a Franchise		Days To Contacted 🔹 🔹		Save
Preferred Communication Channel 0				Activity Timeline

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

8		Q Search Leads and more		*• 🗄 ? 🜲 👼
Franchise Recruitm	Home Chatter Lea	ds 🗸 Accounts 🗸 Contacts 🗸 Opportunit	ies 🗸 Cont	tracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Andreas Fotos				+ Follow Edit Delete Change Owner V
Position Current Employer Carpenter Self-employed	Mobile 0488798644	Email andreas.fotos@hotmail.com		
> New	Contacted	In Progress Exhausted		Converted Vark Status as Complete
DETAILS RELATED				ACTIVITY CHATTER
✓ Lead Information				
Name Andreas Fotos		Lead Owner		Log a Call New Event New Task Email
Mobile 0488798644		Lead Status New		Create new Add
Email andreas.fotos@hotmail.com		Lead Source Other		Activity Timeline
Position Carpenter		Initial Contact Date 🕕		Next Steps More Steps
Current Employer		Hours Since Creation		No next steps. To get things moving, add a task or set up a
Area of Interest Buy a Franchise		Days To Contacted  🕕		meeting. Past Activity
Preferred Communication Channel 🕚				> 🖪 Returned your call Today 💌
✓ Address Information				You logged a call
Address				Load More Past Activities 🔻

## How to send an email

Salesforce allows you to send an email to the prospect. When you send an email using Salesforce the email is logged to the Activity Timeline. This is useful for keeping a record of all interactions with the prospect.

Franchise Recruitment contains automated email templates to send to prospects following a one on one meeting. *See* "How to send automatic emails following the one on one meeting" on page 96.

#### To send an email

- 1. Locate the Opportunity, Account or Lead. *See* "How to locate the right record" on page 188.
- 2. From the Activity pane, select the Email tab.

®.	Q Search Salesforce	** 🗄 ? 单 👼
Franchise Recruitm Home Chatter Lead	s v Accounts v Contacts v Opportunities v Con	tracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Mr. Alexander Ivanov-	+ Follov	v 1:1 Meeting Set Price Book Add Product 🗸
Account Name Close Date Amount Alexander Ivanov 31/03/2018	Opportunity Owner	
One on One     Reviewing Inf     Territory Reser	Sourcing Fina Offer to Purch Long Term Pro	Closed V Mark Stage as Complete
DETAILS RELATED		ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018	Legis Cell New 1.1 New Task Empil
Opportunity Name Mr. Alexander Ivanov-	Stage One on One Meeting	Subject
Account Name Alexander Ivanov	Probability (%) 30%	Call
Contract 00000212	Amount	Comments
Description	Primary Campaign Source	6
✓ 1:1 Meeting		Name
Preferred Date 1 0	Preferred Date 2 🕚	Related To
Preferred Time 1 🕚	Preferred Time 2 🕚	wr. Alexander Ivanov-

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

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

8.		Q Search Salesforce		* 🖬 ? 单 🐻
Franchise Re	Cruitm Home Chatter I	Leads 🗸 Accounts 🗸 Contacts 🗸 Opportu	nities 🗸 Contracts 🗸 C	Campaigns 🗸 Territories 🗸 More 🔻 🖋
Opportunity Mr. Alexand	der Ivanov-		+ Follow 1:1 Mee	ting Set Price Book Add Product 🖵
Account Name Alexander Ivanov	Close Date Amount 31/03/2018	Opportunity Owner		
One on One	. Reviewing Inf Territory R	Reser Sourcing Fina Offer to Purch	Long Term Pro Clos	ed V Mark Stage as Complete
DETAILS	Alexander Ivanc	×	ACTIVI	TY CHATTER
Opportunity Owner	Position Current E Brick-layer Walls R L	Employer Js	Log a Ca	II New 1:1 New Task Email
Mr. Alexander Ivanc	Mobile Email 0431667668 alexande	r.ivanove Copy Email Address	<b>2</b> • From	REC Sales Manager <dean.llewellyn@f▼< td=""></dean.llewellyn@f▼<>
Contract 00000212	Opportunities (1)	Inspect Element Services	То	
Description	Mr. Alexander Ivanov- Stage: One on One Meeting Amount:	3n Source		dean.llewellyn@franchisecloudso ×
✓ 1:1 Meeting Preferred Date 1	Close Date: 31/03/2018	View All	Bcc	
Preferred Time 1 🚯		Preferred Time 2 1	Subject	Enter Subject

4. Complete Subject and Details then press Send.

8	Q Search Salesforce	* 🖬 ? 🖡 🐻
Franchise Recruitm Home Chatter Le	ads V Accounts V Contacts V Opportunities V Cor	tracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Popportunity Mr. Alexander Ivanov-	+ Follow	v 1:1 Meeting Set Price Book Add Product 👻
Account Name Close Date Amount Alexander Ivanov 31/03/2018	Opportunity Owner	
One on One Reviewing Inf Territory Res	ser Sourcing Fina Offer to Purch Long Term Pro	Closed <ul> <li>Mark Stage as Complete</li> </ul>
DETAILS RELATED		ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018	Log a Call New 1:1 New Task Email
Mr. Alexander Ivanov-	Probability (%)	From REC Sales Manager <dean.llewellyn@f▼< td=""></dean.llewellyn@f▼<>
Contract 00000212	Amount	To
Description	Primary Campaign Source	Cc
✓ 1:1 Meeting	Professed Date 2	Bcc dean.llewellyn@franchisecloudso x
Preferred Time 1 ()	Preferred Time 2 0	Subject Additional meeting times
✓ Demonstration Day Information		Font • Size •
Demonstration Day 0	Demonstration Day Franchise 🛛 🕚	
Demonstration Date 0	Demonstration Day Contact 0	Hi Alexander
✓ 1:1 Meeting Follow Up Emails		Just checked my schedule, I'm also available on the 15th and the 18th all day and evening. Is that
Send One on One Meeting Emails 0	One on One Meeting Follow Up Send Date  🕕	of interest? Yours
Send Banker Referral 0	Banker Referral Email Send Date  🕕	Dean
Send Vehicle Finance Referral 🚯	Vehicle Finance Referral Email Send Date  🕕	Related To
Send Demonstration Day Referral Email	Demonstration Day Email Send Date 🛛 🕚	Mr. Alexander Ivan
$\checkmark$ Timeline Information		
and a set of a set of a	a construction of the second	

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

Image: Franchise Recruitm         Home         Chatter	Q     Search Salesforce       Leads     V       Accounts     V       Opportunities     Corr	tracts ∨ Campaigns ∨ Territories ∨ More ▼ ✓
Copportunity Mr. Alexander Ivanov- Account Name Alexander Ivanov 31/03/2018	Opportunity Owner     Constant State States Manager 2	v 1:1 Meeting Set Price Book Add Product 🖵
One on One Reviewing Inf Territory	Reser Sourcing Fina Offer to Purch Long Term Pro	Closed V Mark Stage as Complete
DETAILS RELATED		ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018	Log a Call New 1:1 New Task Email
Opportunity Name Mr. Alexander Ivanov-	Stage One on One Meeting	
Account Name Alexander Ivanov	Probability (%) 30%	Create new Add
Contract 00000212	Amount	Activity Timeline
Description	Primary Campaign Source	Next Steps More Steps
✓ 1:1 Meeting		>      Cne on One Meetin 6:30 PM   29/03
Preferred Date 1	Preferred Date 2 🕚	You have an upcoming Event with Alexander Ivanov
Preferred Time 1	Preferred Time 2	Past Activity
✓ Demonstration Day Information		Additional meeting 3:37 PM   Today       You sent an email to Alexander Ivanov
Demonstration Day	Demonstration Day Franchise	Load More Past Activities
Demonstration Date 🕚	Demonstration Day Contact	

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

ACTIVITY	CHATT	ER	
Log a Call	New Event	New Task	Email
* From	REC Sales Mana	ager <mike@fra< td=""><td>anchisec</td></mike@fra<>	anchisec
То			<b>.</b> .
Related To			•
Alexa	nder Ivanov	×	
@ <1> B	, ◎ 亩 ♂		Send
	ଚ > 🗗	0 💼	ď

# How to edit default email templates

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



## How to review email template headers and footers

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

To review the branded email headers and footers

1. Open the App Launcher.



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



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



4. Name the list view and press Save.



5. Now select the Standard Letterhead.

	FRANCHISE						All 🔻	Q. Se	arch Enhanced L	atterheads and	more						*	•	?	Ļ (	8
	Business Manage	Home	Chatter	Accounts $\smallsetminus$	Contact	s 🗸 Job	s 🗸 Jot	o Offers 🗸	Job Calendar	Invoices 🕔	- Payments ->	Customer F	eedback 🗸	Material Price	Lists $\vee$	* Recently Viewed   Enhan	~ ×	More	•		1
1 iten	Enhanced Letterheads All - Sorted by Name - Filtered by all e	enhanced let	terheads - U	pdated a minute a	igo											Q. Search this list		\$*	C'	¢	T
	Name 1				~	Created By				✓ Last	Modified Date				~ 1	Description				~	
1	FCS Standard Letterhead					ljenk				23/	01/2020 2:18 PM										¥.

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

FRANCHISS CLOUE SOLUTION		All 💌 Q. Search Enhanced Letter/heads and more	<u></u> ∎? ≜ 🚱
Business Mana	d	s 🗸 Job Offers 🗸 Job Calendar Invoices 🗸 Peyments 🗸 Customer Feedbac	k 🗸 Material Price Lists 🗸 'Recently Viewed   Enhan 🗸 X More 💌 🧳
Description	Letterineau		
Details			
✓ Information			
Name FCS Standard Letterhe	d	Description	
✓ Letterhead Conte	ıt		
Header	FRANC CLO SOLUT		
Footer {{{Sender.Email_Signature_	_c)))		
✓ System Information	n		
Created By	1/2020 2:18 PM	Last Modified By  Loryn Jenkins, 23/01/2020 2:18 PM	
FRANCHISE CLOUDS Business Manage	Home Chatter Accounts V Contacts V Jobs V	All     ▼     Q.     Search Enhanced Letterheads and more       ✓     Job Offers     ✓     Job Calendar     Invoices     Yeyments     ✓     Customer Feedback     ✓	Image: Second price Lists     Reports     Image: Record price Lists     Nore     Image: Second price Lists
Enhanced Letterhead FCS Standard L	tterhead		
Description			
Details			
✓ Information			
Name FCS Standard Letterhead		Description	
✓ Letterhead Content			
Header	FRANCI CLO SOLUTI	HISE UD NNS	
Footer ({{Sender.Signaturec)}}			
✓ System Information			
Created By	2020 2:18 PM	Last Modified By	
ď	If you would like a c manager or system	hange to the Standard Lette administrator.	erhead, speak to your field
	There may be more mentation. If there is like to use. You can might choose to cre page 201.	e than one Letterhead availa s, review each letterhead to add letterheads to any cus eate. <i>See</i> "How to create a c	able within your imple- o see which one(s) you might tom email template you sustom email template" on

## 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.

	CLOUD	All 🚽 🔿 Saarch Salacforra		🗭 🥵
Bu	App Launcher	email templates 🛛 😵		1
Today's I	∽ All Apps		1	
	All Marrie <b>2</b>		-	
	V All Items			
	Email Templates			
Recent F				
E. FC				
En FC				

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.

		I	New E	mail	Tem	pla	te				
nformation				/							
* Email Template Name					Relat	ed En	ntity T	уре			
My Quote Email Ter	mplate				1	None	∋				•
Description					Folde	er					
					Pri	ivate	Ema	ail Te	mplates		
lessage Content											
Subject					Enha	nced	Lette	rhead	i		
					Se	arch	Enha	inced	Letterheads		Q
HTML Value											
Source Font -	Size - B	ΙU	<u>A</u> - ]	:=	≥.	Ξ.	±.	æ	<b>EA -</b>		
											{}
dditional Informati	on										
Created By					Last I	Vodif	îed B	У			
										Cancol	

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.

New Ema	ail Template
Information	
* Email Template Name	Related Entity Type
My Quote Email Template	None V
Description	Catalog Profile Check-In
Message Content	Contact
Subject	Course
	Customer Feedback
HTML Value	DocuSign Recipient Status
Source Font - Size - <b>B I U</b> <u>A</u> - $\frac{1}{2}$	DocuSign Status
	Instructor
	Invoice
	Job
	Job Offer
	IJ
Additional Information	
Created By	Last Modified By
	Cancel Save

6. Enter an email subject line.

New Ema	il Template
Information	
* Email Template Name	Related Entity Type
My Quote Email Template	Job
Description	Folder Private Email Templates
Message Content	
Subject	Enhanced Letterhead
FCS Invoice - {{{FCS_OPSJobc.Name}}}	Search Enhanced Letterheads Q
HTML Value	
Source Font - Size - B $I \sqcup A$ - $\frac{1}{2}$ :	
	1
Additional Information Created By	Last Modified By
	Cancel Save

7. Select an appropriate letterhead.

New Email	Template
formation	
*Email Template Name	Related Entity Type
My Quote Email Template	• dol
Description	Folder Private Email Templates
lessage Content	
Subject	Enhanced Letterhead
FCS Invoice - {{{FCS_OPSJobc.Name}}}	قومتدh Enhanced Letterheads ۹
HTML Value	FCS Standard Letterhead
O Source Font ▼ Size ▼ B I U A ▼ L = :=	
dditional Information	
Created By	Last Modified By
	Cancel Save

You can review the available letterheads. *See* "How to review email template headers and footers" on page 198.

8. Enter boilerplate text into the HTML Value field.

New En	nail Template
formation	
* Email Template Name	Related Entity Type
My Quote Email Template	Job
Description	Folder
	Private Email Templates
essage Content	
Subject	Enhanced Letterhead
FCS Invoice - {{{FCS_OPSJobc.Name}}}	E FCS Standard Letterhead ×
HTML Value	
Source Font - Size - <b>B I U A</b> - 2	
Dear ,	
Please find attached your quote for job .	
Feel free to contact me if you have any queries	or need further information about the work.
Thank you,	
	0
dditional Information	
Croated By	Last Modified By
ereated by	and mounted by

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

New Ema	ail Template
Information	
* Email Template Name	Related Entity Type
My Quote Email Template	dof
Description	Folder Private Email Templates
Message Content	
Subject	Enhanced Letterhead
FCS Invoice - {{{FCS_OPSJobc.Name}}}	E FCS Standard Letterhead ×
HTML Value Source Font Size B I U A JE : Dear , Please find attached your quote for job . Feel free to contact me if you have any queries of Thank you,	r need further information about the work.
Additional Information	
Created By	Last Modified By
	Cancel Save

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

		New Email Template	×
Informati		Insert Merge Field	
* Email T My Qu	<u>Recipient</u>	Select Merge Field	•
Descript	Sender	Search Recipient merge fields	٩
	Organization Job	# Contacts	Contact
Message		Accepts Reference Calls	Contact
Subject FCS Ir		Assistant's Name	Contact
HTML Va		Asst. Phone	Contact
o So		Birthdate	Contact
Dear		O Business Fax	Contact
Pleas Feel f		Business Phone	Contact
Thanl		Contact Description	Contact
		Contact ID	Contact
		Created By ID	Contact
		Created Date	Contact
Additiona		O Data.com Key	Contact
Created			Cancel
			Cancel Save

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

		New Email Template	
Informati		Insert Merge Field	
* Email Tr My Qu Descripti	Recipient Sender Organization Job	Select Merge Field     Name   Name     Image: Select Merge Field   Image: Select Merge Field     Image: Select Merge Field   Image: Select Mer	
Message ( Subject FCS Ir HTML Va Dear Pleas Feel 1 Thank		Franchise Name Job Name Last Name	
		Cancel	Save

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

Related Entity Type	
dol	•
Folder	
Private Email Templates	
Enhanced Letterhead	
E FCS Standard Letterhead	×
Namec}}},	
OPS_Job_c.Name}}}.	
or need further information about the work	
	0
	0
	1)
Last Modified By	0
Last Modified By	
	Related Entity Type Job Folder Private Email Templates Enhanced Letterhead Enhanced Letterhead FCS Standard Letterhead Enhanced Letterhead FCS Standard Letterhead Same_c}}; OPS_Job_c.Name}; ] or need further information about the work

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

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.

### 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.

System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.

# How to send all emails to my inbox

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

To blind copy all emails to your email address

1. Go to View Profile and choose Settings.

FRANCHISE CLOUD SOLUTIONS			Q Search			2	1 🗵 🛚 🔹 🕬
Business Managem	Home Ta	isks 🗸 Chatter	Accounts $\checkmark$ Jobs $\checkmark$	Job Calendar	Invoices 🗸 Contact	s 🗸 Audita	John Smith
JobCalendar Viewing Calendar for John							nfctrial01-dev-ed.my.salesforce.com Settings Log Out
Smith in Australia/Sydney timezone							USERNAMES
Search Jobs	<	Today >			Nov 06 - 12 2022	Agenda L	loryn.jenkins@nfctrial01.demo nfctrial01-dev-ed.my.salesforce.com
Job Number or J Search					100 00 - 12, 2022		O loryn@auditorg.com auditorg.my.salesforce.com
		Sun 6/11	Mon 7/11	Tue 8/11	Wed 9/11	Thu 10/11	
Showing first 25 results. show more	all-day						DISPLAY DENSITY
> JN-00619	7am						✓ Comfy
Created by Quick Job, Ringwood	Rom						Compact
> JN-00464	oain						OPTIONS
Painting - Sonnen, Ringwood	9am						Switch to Salesforce Classic ()
> JN-00618 Created by Quick Job,	10am						Add Username

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



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

FRANCHISE		Q Search				*	<b>6</b> A	? 垃	
SOLUTIONS	New Telesco Oberes				4				•
Business Managem	Home Tasks V Chatter	Accounts V Jobs V	Job Calendar Invoices	✓ Contacts	✓ Audits ✓	Payments V	Reports	/ More	· /
Q, Quick Find	My Email Settin	ngs							
<ul> <li>My Personal Information</li> </ul>									
Advanced User Details Approver Settings	My Email Settings							Help for th	s Page 🥹
Change My Password	Outgoing Email Settings						1	= Required Inf	ormation
Connections									
External Credentials	Send through Salesforce How would you like your name to a	ppear on your outgoing email?							
Grant Account Login Access	Email Nam	John Smith							
Language & Time Zone	What email address would you like Email Address	to use as your return address? support@franchiseclouc							
Login History	Would you like to automatically BC	C emails to your return address?	1						
Personal Information		1 TOS	•						
Reset My Security Token	Signature								
Security Central	This signature will be added to you Email Signature	r outgoing emails (1333 characters m	ax):						
> Display & Layout									
v Email									
My Email Settings									
My Email to Salesforce									
My Unresolved Items	Note: All outgoing emails will conta	in a "Powered by Salesforce" tag line	at the bottom. This tag can be rer	oved in the paid Edition	ins of the product.				
> Chatter	Subscriptions								
> Calendar & Reminders	Receive Salesforce CRM Cont Receive Salesforce CRM Cont	ent Email Alerts 1 ent Alerts as Daily Digest 1	2						
> Desktop Add-Ons									
> Import		Save	Cancel						

ļ

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

# How to schedule a one on one meeting

When a qualified prospect requests a one on one meeting, you can schedule the meeting from the Opportunity record.



To check the sales representative's availability, How to check availability.

#### To schedule a one on one meeting

1. From the **Opportunity**, select the **New 1:1 Meeting** tab.

●         Image: State Stat	Q Search Opportunities	and more	tracts v Campaigns v Territories v More v 🖉
Upportunity Mr. Alexander Ivanov-		+ Follow	1:1 Meeting Set Price Book Add Product 🗸
Account Name Close Date Am Alexander Ivanov 31/03/2018	Nount Opportunity Owner	Σ,	
One on One Reviewing Inf Te	rritory Reser Sourcing Fina	Offer to Purch Long Term Pro	Closed V Mark Stage as Complete
DETAILS RELATED			ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018		Log a Call New 1:1 New Task Email
Opportunity Name Mr. Alexander Ivanov-	Stage One on One Meeting		Subject
Account Name Alexander Ivanov	Probability (%)		Call
Contract	Amount		Comments
Description	Primary Campaign Source		
✓ 1:1 Meeting			Name
Preferred Date 1	Preferred Date 2		E Search Contacts Q Related To
Preferred Time 1	Preferred Time 2		Mr. Alexander Ivanov-

2. Enter the details for the proposed meeting and press **Save**.

ACTIVITY	CHATTER			
Log a Call	New 1:1	New Task	Email	
* Start Date		Time		
29/03/20	18 🛗	5:30 PM	0	
* End Date		Time		
29/03/20	18 🛗	6:30 PM	0	
Related To	er Ivanov-			
Location				
Head Offic	e			
Description				
Alexander	's preferred tim	e.		
* Assigned To	)			
REC S	ales Manager		×	
			Save	

9

This creates an appointment for the one on one meeting. It does not send a meeting request to the prospect. *See* "How to confirm a scheduled appointment with a prospect" on page 197.

## How to reschedule a one on one meeting

On occasion a prospect will need to reschedule a one on one meeting.



To check the sales representative's availability, How to check availability.

#### To reschedule a one on one meeting

1. From the **Opportunity**, locate the meeting in the **Next Steps** list.

8		Q Search Opportunities and more		★ 🖬 ? 单 🐻
Franchise Recruitm Home	Chatter Leads	✓ Accounts ✓ Contacts ✓ Opportunitie	es 🗸 Contra	cts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Poportunity Mr. Alexander Ivanov-			+ Follow	1:1 Meeting Set Price Book Add Product 👻
Account Name Close Date Alexander Ivanov 31/03/2018	Amount	Opportunity Owner		
One on One     Reviewing Inf	Territory Reser	Sourcing Fina Offer to Purch Lor	ng Term Pro	Closed  V Mark Stage as Complete
DETAILS RELATED				ACTIVITY CHATTER
Opportunity Owner		Close Date 31/03/2018		Log a Call New 1:1 New Tack Email
Opportunity Name Mr. Alexander Ivanov-		Stage One on One Meeting		
Account Name Alexander Ivanov		Probability (%) <b>30%</b>		Create new Add
Contract 00000212		Amount		Activity Timeline
Description		Primary Campaign Source		Next Steps More Steps
✓ 1:1 Meeting			<u>ا</u>	> 🛗 One on One Meetin 5:30 PM   29/03 💌
Preferred Date 1 🕕		Preferred Date 2	,	You have an upcoming Event with Alexander Ivanov
Preferred Time 1		Preferred Time 2		Past Activity
$\checkmark$ Demonstration Day Information				No past activity. Past meetings and tasks marked as done show up here.
Demonstration Day		Demonstration Day Franchise  🕚		Load More Past Activities
Demonstration Date  🕕		Demonstration Day Contact 🕕		
2. From the **Show more** button menu, select **Edit**.

8	2 Search Opportunities and more	★ 🖬 ? 单 🐻
Franchise Recruitm Home Chatter Leads	✓ Accounts ✓ Contacts ✓ Opportunities ✓ Contacts ✓	ntracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Popportunity Mr. Alexander Ivanov-	+ Follow	w 1:1 Meeting Set Price Book Add Product 🗸
Account Name Close Date Amount Alexander Ivanov 31/03/2018	Opportunity Owner           Image: The second	
One on One Reviewing Inf Territory Reser	Sourcing Fina Offer to Purch Long Term Pro	Closed  ✓ Mark Stage as Complete
DETAILS RELATED		ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018	Log a Call New 1:1 New Tack Email
Opportunity Name Mr. Alexander Ivanov-	Stage One on One Meeting	
Account Name Alexander Ivanov	Probability (%) 30%	Create new Add
Contract 00000212	Amount	Activity Timeline
Description	Primary Campaign Source	Next Steps ······ More Steps
✓ 1:1 Meeting		> 🛗 One on One Meetin 5:30 PM   29703 💌
Preferred Date 1 🕚	Preferred Date 2 0	You have an upcoming E Alexander Ivanov Change Record Type
Preferred Time 1 0	Preferred Time 2	Past Activity Delete
✓ Demonstration Day Information		No past activity. Past meetings and tasks marked as done show up here.
Demonstration Day 👔	Demonstration Day Franchise 🕧	Load More Past Activities
Demonstration Date 0	Demonstration Day Contact 🚯	

The Edit One on One Meeting dialog box appears.

3. Change the details on the meeting schedule, then press **Save**.

Edit One on One Meeting - Mr. Alexander Ivanov-

* Assigned To		Location	
REC Sales Manager	×	Head Office	
*Subject		* Start	
One on One Meeting - Mr. Alexander Ivanov-		Date Time	
		29/03/2018 💼 6:30 PM	0
Name		* End	
	~	Date Time	
Alexander Ivanov		29/03/2018 🛗 7:30 PM	0
Related To		All-Day Event	
Wr. Alexander Ivanov-	×		
* Activity Currency			
Australian Dollar	•		
Created By		Last Modified By	
REC Sales Manager, 20/03/2018 1:20 PM		REC Sales Manager, 20/03/2018 1:20 PM	
Description			
Alexander's preferred time.			
			h
		Cancel Save & New	Sa
-			

This creates an appointment for the one on one meeting. It does not send a meeting request to the prospect. *See* "How to confirm a scheduled appointment with a prospect" on page 197.

## How to confirm a scheduled appointment with a prospect



Salesforce does not provide the ability to send a meeting request to a prospect using built-in Activity features.

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

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

### How to share your calendar

It is helpful for others to be able to determine your availability.

To allow other people to check your availability

1. From your **Calendar**, press the **My Events Options** button and choose **Share Calendar**.

8			Q	Search Events an	d more					*			? <b>Ļ</b>	6
•••• Fra	inchise Recruitm	1 Home	Chatter Leads 🗸	Accounts 🗸	Contacts 🗸	Opportunities 🗸	Contracts 🗸 Ca	impaigns	~	Caler	ndar 🔨	~ N	lore 🔻	•
E Ca	lendar arch 19, 2018-	March 25, 20	18				< >			C	<b></b>	•	New Eve	ent
GMT +11	MON 19	TUE 20	WED 21	THU 22	FRI 23	SAT 24	SUN 25	•		MARCH		•	2018	•
7am								Sun	Mon	Tue	Wed	Thu	Fri	Sat
90.00												1	2	3
oam								4	5	6	7	8	9	10
— 9am —								11	12	13	14	15	16	17
— 10am —								18	19	20	21	22	23	24
								25	26	27	28	29	30	31
— 11am —										3	1	5	6	
— 12pm —								My C	alenc	dars				
							-	Othe	or Cal	enda				• ndar
1pm							2	Oule			Share	Calend	ar	
— 2pm —											-	-	-	

The Share Calendar dialog box appears.

2. Search for the person you want to Share With.

5	Share Calendar
Share With	• Access
Search People	Q Show Details and Add Events 👻
	Access Descriptions
> Who Has Access	
	Done

3. Press Share.

Share	Calendar
Share With	*Access
OPS Head Office Manager ×	Show Details and Add Events 🚽
	Access Descriptions
> Who Has Access	
	Cancel

You have now shared your calendar.



You can check who you have shared your calendar with by selecting Who Has Access in the Share Calendar dialog box.

## How to view someone else's calendar

It is often useful to have access to other people's calendars in order to check their availability and add events directly to their calendars on their behalf.

To view someone else's shared calendar

1. From your Calendar, press the Other Calendars Settings button and choose Add Shared Calendar.

8			Q	Search Events and	d more					*		• ?	,	5
***	Franchise Recruitm	1 Home	Chatter Leads 🗸	Accounts 🗸	Contacts 🗸	Opportunities 🗸	Contracts 🗸 Ca	Impaigns	~	Caler	ndar 🥆	r M	lore 🔻	, " <b>"</b>
Ē	Calendar March 19, 2018-	March 25, 20:	18				< >			C	<b></b>		lew Eve	ent
GMT +1	MON 19	TUE 20	WED 21	THU 22	FRI 23	SAT 24	SUN 25	•	,	MARCH		•	2018	•
7am								Sun	Mon	Tue	Wed	Thu	Fri	Sat
— 8am												1	2	3
Gam								4	5	6	7	8	9	10
9am								11	12	13	14	15	16	17
— 10am	i —							18	19	20	21	22	23	24
								25	26	27	28	29	30	31
— 11am	۱ —								2	ີ	4			
— 12pm	n							My C	Event	iars s				•
							9	Othe	r Cale	endar	s			\$
— 1pm											Ad	d Share	d Caler	ndar
— 2pm														

The Add Shared Calendar dialog box appears.

2. Search and then select the person whose calendar you want to view, and then press Add.



You can now see the select person's calendar and add to their events.

8			Q	Search Events and	d more					*	•	2?	, Ù	6
Fran	nchise Recruitm	Home	Chatter Leads 🗸	Accounts 🗸	Contacts 🗸	Opportunities 🗸	Contracts 🗸 Ca	ampaigns	~	Calen	ıdar 🥆	- м	1ore 🔻	
Cale Ma	<sup>ndar</sup> I <b>rch 19, 2018-I</b>	March 25, 201	18				< >			C	<b></b>	· N	Jew Eve	ent
GMT +11	MON 19	TUE 20	WED 21	THU 22	FRI 23	SAT 24	SUN 25	•	,	MARCH		•	2018	•
7am								Sun	Mon	Tue	Wed	Thu	Fri	Sat
9am												1	2	3
oan								4	5	6	7	8	9	10
9am —								11	12	13	14	15	16	17
— 10am —								18	19	20	21	22	23	24
								25	26	27	28	29	30	31
— 11am —									2	3				
— 12pm —								My C	alenc Event	lars s				•
								Othe	r Cale	endars	S			\$
1pm								OF	PS Hea	d Office	e Mana	ger		•

## **Training courses**

Franchisees and other key contacts often need to be enrolled in at least one training course as part of post-sale activities and handover to franchise operations.

Administrator privileges are required in order to create a training course. Once a training course is created, any user can book contacts into the training course.

### How to enroll a contact in a training course

Booking a franchisee or other employees into a training course is often completed on or near handover to franchise operations.

To enroll a contact in a training course

1. From the Salesforce menu More button, select Training Courses.



The Training Courses list appears.

2. Open the list view to see all available training courses.

8				C	2 5	Search Trainii	ng Co	ourses and n	nore						1		1	<b>,</b>	6
***	Franchise Recruitm	Home	Chatter	Leads	~	Accounts	~	Contacts	$\sim$	Opportunities	~	Contracts	~	Training Courses	$\sim$	More 🔹			
2 item	Training Courses Recently Viewed	-		-1	ງ 2	2									\$	·	C	0	<b>T</b>
	All									✓ STATUS		~	лимі	BER OF REGI 🗸	TRA	INER		~	
1	All Training Courses									Confirme	d		2						•
2	<ul> <li>Recently Viewed</li> </ul>									Planned			3		Jam	es Brown			•

3. Select the desired training course.

8				۹. ۹	Search Trainin	g Courses and I	nore					*		?	Ļ.	6
***	Franchise Recruitm	Home	Chatter	Leads 🗸	Accounts	✓ Contacts	~ (	Opportunities	✓ Cor	itracts 🗸	Training Courses	~ !	vlore 🔻			
=	Training Courses All Training Courses	S 🔻												-		
6 iter	ns · Sorted by Training Course N	ame • Updated	a few seconds	ago				STATUS		N. NULL				C	C	Y
1	Computer Basics Course	Fiterent		27/11/201	7	28/11/2017		Planned		1	IDER OF REGI V	Tina Tu	urner		•	¥
2	FCS Operations Busine	Lawrnal		3/04/2018		6/04/2018		Confirme	d	2						•
3	New Franchisee Induct	Induction		22/01/201	8	26/01/2018		Confirme	d	6		James	Brown			•
4	New Franchisee Induct	Induction		19/03/201	8	23/03/2018		Planned		3		James	Brown			•
5	New Franchisee Induct	Induction		16/10/201	7	20/10/2017		Confirme	d	1		James	Brown			•
6	OH&S Training	Refresh		31/10/201	7	31/10/2017		Confirme	d	1		Tina Tu	urner			•

The selected **Training Course** opens.

4. Select Related.

3.		Q Sea	arch Training Courses an	d more		_		*• 8	? 🌲 🌔
Franchise Recruitm	Home Cha	atter Leads 🗸	Accounts 🗸 Conta	ts 🗸 Opportunitie	≗s ∨ Contr	racts 🗸 Trai	ning Courses 🥆	✓ More ▼	
Training Course FCS Operations Busin	ness Manage	ment Fundame	ntals						
Type Trainer S External S	Start Date 3/04/2018	End Date 6/04/2018	Status Confirmed						
DETAILS RELATED						ACTIVITY	_		
Training Course Name FCS Operations Business Manage Fundamentals	ment	Owner	EC Administrator			Log a Call	New Event	New Task	Email
Type External		Trainer				Create ne	2W		Add
Status Confirmed		Assesso	or						
Start Date 3/04/2018		Numbe 2	er of Registrations			Activity Time	eline	▼ C <sup>1</sup>	Expand All
End Date 6/04/2018						Next Steps			
✓ System Information						No next step	s. To get things n mee	noving, add a t ting.	ask or set up a
Created By	018 3:21 PM	Last Mo	odified By EC Administrator, 21/0	)3/2018 3:24 PM		Past Activity			
Currency Australian Dollar						No past activ	vity. Past meeting show u	gs and tasks ma p here.	arked as done
									ctivities 🔻

5. From the **Registrations** list, press **New**.

8			Q	Search Training Cour	ses and more						? 🌲	6
Franchis	se Recruitm.	Home	Chatter Leads 🗸	Accounts 🗸 🤇	Contacts 🗸	Opportunities	✓ Co	ontracts 🗸	Training Courses	✓ More ▼		
FCS Op	Course Derations B	usiness Man	agement Fundan	nentals								
Type External	Trainer	Start Date 3/04/2018	End Date 6/04/2018	Status Confirmed								
DETAILS	RELATED	_						ACTIV	ITY			
📼 Registi	rations (2)	CT 111115		1000		Nev	w	Log a C	Call New Event	New Task	Email	
REG-000014	N: REGIST LA	nes	Megan	FCS N	ewtown			Crea	ite new		Add	
REG-000015	Sr	nith	Bob	Territo	ry - St Ives	•						
			View All					Activity Next Ste	Timeline eps	C,	Expand A More Step	<b>All</b>

The New Registration dialog box appears.

6. Search or select from the list to add the Contact.

	New Registration
Information	
Training Course     ScS Operations Business Management Fut	Registration Number
*Contact Search Contacts	
Bob Smith Territory - St Ives Megan Ames	IT Equipment Required
Immy Knowles	Assessment Complete
Comeron Jones Territory - Bega	
+ New Contact	
	Cancel Save & New Save

7. Check any of the registration attributes that are true and press **Save**.

New Registration				
Information				
Training Course	Registration Number			
Contact  Douglas Mitchell  X				
Registration Form Complete	IT Equipment Required			
Registration Complete	Assessment Required			
Fees Paid	Assessment Complete			
System Information				
Currency				
Australian Dollar 🔹				
		Cancel	Save & New	Save

The contact is now registered for the course.

8		Q S	earch Training Courses and more			* 🖬 ? 单 🐻
Franchise Recruitm	Home Chat	ter Leads 🗸	Accounts 🗸 Contacts 🗸	Opportunities 🗸	Contracts 🗸 Training Courses	✓ More ▼
Training Course FCS Operations B	usiness Manager	nent Fundam	entals			
Type Trainer External	Start Date 3/04/2018	End Date 6/04/2018	Status Confirmed			
DETAILS RELATED					ACTIVITY	
Registrations (3)				New	Log a Call New Event	New Task Email
REGISTRATION: REGIST LA	AST NAME	FIRST NAME	ACCOUNT NAME			
REG-000014 Ar	mes	Megan	FCS Newtown	•	Create new	Add
REG-000015 Sr	nith	Bob	Territory - St Ives	•		
REG-000016 M	itchell	Douglas	Territory (D) - Bondi	•	Activity Timeline	▼ C <sup>4</sup> Expand All
•		View All			No next steps. To get things	More Steps

Now might be a good time to send an email to the contact confirming registration details.

# Customer Communications

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## Working with prospects on the phone

Franchise Recruitment provides a range of tools for sales representatives and sales support team members to be able to quickly and easily field prospect requests. The following topics deal with a range of tasks common to Opportunity, Account or Lead records, encompassing taking notes, creating follow up tasks, sending emails, and scheduling meetings.



When recording new leads over the phone, *See* "Manually created leads" on page 48.

## How to locate the right record

When a prospect not new to your business contacts you, you need to locate the right record so that you can record new information and update existing information in the right place.

#### To locate a person's record

1. Ask for the person's name. Enter their name into the Salesforce search box.

<b>®</b>	Q megan	j 🖬 ? 🖡 🐻
Franchise Recruitm Home Chatter Le	A "megan"	racts 🗸 Campaigns 🗸 Reports 🗸 More 🔻 🖋
Quarterly Performance	Megan Ames     Account	Assistant
CLOSED AUD 130,000 OPEN (>70%) AUD 130,000	Megan Ames	> U Opportunity has overdue tasks
300к	Poportunity	> Upportunity has no open x
200к —	Megan Ames Contact	> 20 days without any activity X Bob Smith-
	Contact · Megan Ames	> Yange 30 days without any activity Xana Smith-
100к -		> 🔛 30 days without any activity X
0	Mar Closed + Open (>70%)	

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

2. If there is an **Opportunity** record, try that one first. Select the **Opportunity**.

<b>®</b>	Q megan	x 🖬 ? 单 🐻
Franchise Recruitm Home Chatter Le	Q "megan"	racts 🗸 Campaigns 🗸 Reports 🗸 More 🔻 🖋
Quarterly Performance	Megan Ames Account	Assistant
CLOSED AUD 130,000 OPEN (>70%) AUD 130,000	Hegan Ames	> Upportunity has overdue tasks
300к	Opportunity	>  Opportunity has no open  activities
200к	Es Megan Ames Contact	> 30 days without any activity ×
	Began Ames Contact • Megan Ames	> 🍟 30 days without any activity 🗙
100к —		>      30 days without any activity      Phuong Ngo-
0	Mar Closed + Open (>70%)	

3. Check the Opportunity stage. If the Opportunity stage is closed, then click on the Account Name link and record the information in the related Account.

Image: Standard Strength Strengt Strengt Strength Strength Strength Strength Strength Strength St	Q megan r Leads v Accounts v Contacts v Opportun	nities v Contracts v Campaigns v Reports v More v 🖍
Copportunity Megan Ames-	Onnortunity Owner	+ Follow 1:1 Meeting Set Price Book Add Product V
Megan Ames 8/03/2018 \$50,000.00	D Transformation States Manager	1
$\bigcirc (                                   $	$\cdot$ $\rangle$ $\cdot$ $\rangle$ $\cdot$ $\rangle$	Closed - Sold Change Closed Stage
DETAILS RELATED		<b>ACTIVITY</b> CHATTER
Opportunity Owner	Close Date 8/03/2018	Log a Call New 1-1 New Task Email
Opportunity Name 2	Stage Closed - Sold	
Account Name Megan Ames	Probability (%) 100%	Create new Add
Contract 00000208	Amount \$50,000.00	Activity Timeline 🔻 C <sup>a</sup> Expand All
Description	Primary Campaign Source Google Search	Next Steps More Steps

If the Opportunity stage is not closed, then record the information in the Opportunity record.

8	Q alexander	** = ? + 🐻
Franchise Recruitm Home Chatt	ter Leads V Accounts V Contacts V Opportunities	S 🗸 Contracts 🗸 Campaigns 🗸 Reports 🗸 More 🔻 🖋
Mr. Alexander Ivanov-		+ Follow 1:1 Meeting Set Price Book Add Product V
Account Name Close Date Ame Alexander Ivanov 31/03/2018	ount Opportunity Owner	
One on One Reviewing Inf Ten	ritory Reser Sourcing Fina Offer to Purch Long	g Term Pro Closed 🗸 Mark Stage as Complete
DETAILS RELATED		ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018	Logo Coll New 1.1 New Tark Empil
Opportunity Name Mr. Alexander Ivanov-	Stage One on One Meeting	
Account Name Alexander Ivanov	Probability (%) 30%	Create new Add
Contract 00000212	Amount	Activity Timeline        Timeline     Timeline
Description	Primary Campaign Source	Next Steps ····· More Steps

4. If there is no Opportunity or Account record, select the Lead.

Q   andreas	]	0
Franchise Recruitm Home Chatter Les Q "andreas"	racts 🗸 Campaigns 🗸 Reports 🗸 More 🔻	
Quarterly Performance Andreas Fotos	Assistant	
CLOSED AUD 130,000 OPEN (>70%) AUD 130,000 GUAL	> Xew lead assigned to you today Andreas Fotos	:
300к	>      Opportunity has overdue tasks     John Brown-	:
200к —	>      Opportunity has no open     activities	:
	> U 30 days without any activity Mr. Alexander Ivanov-	:
100ĸ	> 🔛 30 days without any activity 🗙 Bob Smith-	:]
0	> 😰 30 days without any activity	:
Jan Feb Mar Closed Goal Closed + Open (>70%)	> 10 days without any activity Phuong Ngo-	:

5. If the person's name does not appear on an **Opportunity**, **Account** or **Lead**, then they are likely a new customer.



## How to capture the outcomes of phone calls

When a prospect or prospect calls and leaves a message, sometimes you just need to record information and other times someone needs to follow up the call.

#### To record information

- 1. Locate the Opportunity, Account or Lead. *See* "How to locate the right record" on page 188.
- 2. From the Activity pane's Log a Call tab, press Create new...

8	Q Search Leads and more	*• 🖬 ? 🐥 🐻
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Co	ontracts 🗸 Campaigns 🧹 Territories 🗸 More 🔻 🖋
Andreas Fotos		+ Follow Edit Delete Change Owner 🗸
Position Current Employer Mobile Carpenter Self-employed 0488798644	Email andreas.fotos@hotmail.com	
New Contacted	In Progress Exhausted	Converted V Mark Status as Complete
DETAILS RELATED		ACTIVITY CHATTER
✓ Lead Information		
Name Andreas Fotos	Lead Owner	Log a Call New Event New Task Email
Mobile 0488798644	Lead Status New	Create new Add
Email andreas.fotos@hotmail.com	Lead Source Other	Activity Timeline
Position () Carpenter	Initial Contact Date 0	Next Steps ····· More Steps
Current Employer 🔹 🚯 Self-employed	Hours Since Creation  4.00	> 🔚 🗌 Request for more inform Today 💌
Area of Interest   Buy a Franchise	Days To Contacted  🕚	You have an upcoming Task
Preferred Communication Channel 0		Past Activity

The Log a Call activity pane displays.

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

8	Q Search Leads and more	** 🖽 ? 单 🐻
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Co	ntracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Andreas Fotos		+ Follow Edit Delete Change Owner -
Position Current Employer Mobile Carpenter Self-employed 0488798644	Email andreas.fotos@hotmail.com	
New Contacted	In Progress Exhausted	Converted V Mark Status as Complete
DETAILS RELATED		<b>ACTIVITY</b> CHATTER
✓ Lead Information		
Name Andreas Fotos	Lead Owner	Log a Call New Event New Task Email
Mobile 0488798644	Lead Status New	Returned your call
Email andreas.fotos@hotmail.com	Lead Source Other	Comments Yes tomorrow is fine.
Position 🕕 Carpenter	Initial Contact Date 🔹 🚯	
Current Employer  Self-employed	Hours Since Creation   4.00	Name Andreas Fotos
Area of Interest   Buy a Franchise	Days To Contacted 🕚	Save
Preferred Communication Channel		Activity Timeline

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

8.		Q Search Leads and more	★▼   ? + €
Franchise Recruitm	Home Chatter Lea	ads 🗸 Accounts 🗸 Contacts 🗸 Opportun	nities 🗸 Contracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🦼
Lead Andreas Fotos			+ Follow Edit Delete Change Owner V
Position Current Employer Carpenter Self-employed	Mobile 0488798644	Email andreas.fotos@hotmail.com	
New	Contacted	In Progress Exhausted	Converted V Mark Status as Complete
DETAILS RELATED			<b>ACTIVITY</b> CHATTER
$\checkmark$ Lead Information			
Name Andreas Fotos		Lead Owner	Log a Call New Event New Task Email
Mobile 0488798644		Lead Status New	Create new Add
Email andreas.fotos@hotmail.com		Lead Source Other	Activity Timeline
Position () Carpenter		Initial Contact Date 🛛 🕕	Next Steps More Steps
Current Employer		Hours Since Creation (1) 5.00	No next steps. To get things moving, add a task or set up a
Area of Interest 💿 Buy a Franchise		Days To Contacted 🚯	meeting. Past Activity
Preferred Communication Channel 0			> 🛐 Returned your call Today 💌
✓ Address Information			You logged a call
Address			Load More Past Activities 🔻

## How to send an email

Salesforce allows you to send an email to the prospect. When you send an email using Salesforce the email is logged to the Activity Timeline. This is useful for keeping a record of all interactions with the prospect.

Franchise Recruitment contains automated email templates to send to prospects following a one on one meeting. *See* "How to send automatic emails following the one on one meeting" on page 96.

To send an email

- 1. Locate the Opportunity, Account or Lead. *See* "How to locate the right record" on page 188.
- 2. From the Activity pane, select the Email tab.

8	Q Search Salesforce	** 🖬 ? 单 🐻
Franchise Recruitm Home Chatter Leads	✓ Accounts ✓ Contacts ✓ Opportunities ✓ Contacts	acts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Upportunity Mr. Alexander Ivanov-	+ Follow	1:1 Meeting Set Price Book Add Product 🗸
Account Name Close Date Amount Alexander Ivanov 31/03/2018	Opportunity Owner	
One on One Reviewing Inf Territory Reser	Sourcing Fina Offer to Purch Long Term Pro	Closed Vark Stage as Complete
DETAILS RELATED		ACTIVITY CHATTER
Opportunity Owner	Close Date 31/03/2018	Leg a Call Now 1d New Task Empil
Opportunity Name Mr. Alexander Ivanov-	Stage One on One Meeting	Subject
Account Name Alexander Ivanov	Probability (%) 30%	Call
Contract 00000212	Amount	Comments
Description	Primary Campaign Source	Ŕ
✓ 1:1 Meeting		Name
Preferred Date 1	Preferred Date 2	Related To Mr. Alexander Ivanov-
Preferred Time 1	Preferred Time 2	Save

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

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



4. Complete Subject and Details then press Send.

<b>®</b>	Q Search Salesforce	** 🖬 ? 🜲 🐻
Franchise Recruitm Home Chatter Le	eads V Accounts V Contacts V Opportunities V Cont	racts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Opportunity Mr. Alexander Ivanov-	+ Follow	1:1 Meeting Set Price Book Add Product
Alexander Ivanov 31/03/2018	The second secon	
One on One     Reviewing Inf     Territory Re	sser Sourcing Fina Offer to Purch Long Term Pro	Closed Vark Stage as Complete
DETAILS RELATED		<b>ACTIVITY</b> CHATTER
Opportunity Owner	Close Date 31/03/2018	Log a Call New 1:1 New Task Email
Account Name	Stage One on One Meeting Probability (%)	From REC Sales Manager <dean.llewellyn@f▼< td=""></dean.llewellyn@f▼<>
Alexander Ivanov Contract 00000212	30% Amount	To
Description	Primary Campaign Source	Cc
✓ 1:1 Meeting		dean.llewellyn@franchisecloudso ×
Preferred Date 1 🚯	Preferred Date 2 🕚	Bcc
Preferred Time 1	Preferred Time 2	Subject Additional meeting times
$\checkmark$ Demonstration Day Information		Font · Size ·
Demonstration Day	Demonstration Day Franchise 0	
Demonstration Date 🕚	Demonstration Day Contact 0	Hi Alexander
✓ 1:1 Meeting Follow Up Emails		Just checked my schedule, I'm also available on the 15th and the 18th all day and evening. Is that
Send One on One Meeting Emails 0	One on One Meeting Follow Up Send Date 0	of interest?
Send Banker Referral 🕚	Banker Referral Email Send Date 🛛 🕕	Yours, Dean
Send Vehicle Finance Referral	Vehicle Finance Referral Email Send Date 🛛 🕚	Related To
Send Demonstration Day Referral Email	Demonstration Day Email Send Date 🛛 🕚	Mr. Alexander Ivan
✓ Timeline Information		

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

Image: Second	Q     Search Salesforce       Leads     Accounts       Contacts     Opportunities	Contracts V Campaigns V Territories V More V
Opportunity Mr. Alexander Ivanov- Account Name Alexander Ivanov 31/03/2018	+ F Opportunity Owner	ollow 1:1 Meeting Set Price Book Add Product 💌
One on One Reviewing Inf Territory F	Reser Sourcing Fina Offer to Purch Long Term P	Pro Closed  V Mark Stage as Complete
DETAILS RELATED		<b>ACTIVITY</b> CHATTER
Opportunity Owner	Close Date 31/03/2018	Log a Call New 1:1 New Task Email
Opportunity Name Mr. Alexander Ivanov-	Stage One on One Meeting	
Account Name Alexander Ivanov	Probability (%) 30%	Create new Add
Contract 00000212	Amount	Activity Timeline
Description	Primary Campaign Source	Next Steps More Steps
✓ 1:1 Meeting		> 💼 One on One Meetin 6:30 PM   29/03 💌
Preferred Date 1	Preferred Date 2	You have an upcoming Event with Alexander Ivanov
Preferred Time 1 🕚	Preferred Time 2 🕚	Past Activity
✓ Demonstration Day Information		➤ ▲ Additional meeting 3:37 PM   Today ▼
Demonstration Day	Demonstration Day Franchise 🔹 🕼	Load More Past Activities
Demonstration Date 0	Demonstration Day Contact 🔹	

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

ΑCTIVITY	CHATT	ER	
Log a Call	New Event	New Task	Email
* From R	EC Sales Man	ager <mike@fr< td=""><td>anchisec</td></mike@fr<>	anchisec
То			<u>^</u>
Related To			
I Alexand	ler Ivanov	×	
@	> ڨ ♂		Send
6	<sup>)</sup> ≀ ₿,	0 💼	ď

## How to confirm a scheduled appointment with a prospect



Salesforce does not provide the ability to send a meeting request to a prospect using built-in Activity features.

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

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

## Working with emails and templates

You can configure email templates to suit your organization.

## How to set up an email signature block

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

System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.

## How to review email template headers and footers

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

To review the branded email headers and footers

1. Open the App Launcher.

FRANCHISE SCLIOUD SCLIONAS	All 💌 🔍 Search Salesforce	ו 🖽 ? 🐥 🚱
Business Manage Home Chatter Accounts V Contacts V	Jobs 🗸 Job Offers 🤟 Job Calendar Invoices 🗸 Payments 🗸 Customer Feedback	k ∨ Material Price Lists ∨ Reports ∨ Dashboards ∨ *More ▼
Todays vents	Today's Tasks	Assistant
Recent Records	Key Deals	
John Smith	To see your opportunity-related data, contact your Salesforce admin.	
ECS - Claymore		
FCS - Boxley		
October-09-2019-16:25:53-AEDT-+1100.jpg		
N-00457		
View All		

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.

								All 🔻	Q	Searc	h Enhanced Le	tterheads an	d more										*	٠	?	ņ (	3
	Business Manage	Home	Chatter	Accounts $\lor$	Conta	icts $\lor$	Jobs	v Jot	Offers	~	Job Calendar	Invoices	∨ Paym	ents 🗸	Customer F	Feedback 🗸	Mate	erial Price	ists 🗸	* Rei	cently Viewed   Enh	an	~ ×	More	Ŧ		/
1 item	Enhanced Letterheads All Sorted by Name - Filtered by all e	nhanced lette	rheads - Up	dated a minute a	igo															٩.5	Search this list			\$*	C,	6 1	2
	Name 1				`	<ul> <li>Creat</li> </ul>	ted By					∨ La	st Modified	Date					$\sim$ 1	Descripti	ion					~	
1	FCS Standard Letterhead					ljenk						23	/01/2020 2	:18 PM													

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

FRANCHISE CLOUD SOCUTIONS		All v Q. Search Enhanced Letterheads and more	ו • • • •
Business Mana	te Home Chatter Accounts ∨ Contacts ∨ Jo	bs 🗸 Job Offers 🗸 Job Calendar Invoices 🗸 Payments 🗸 Customer Feedbac	k 🗸 Material Price Lists 🗸 🕆 Recently Viewed   Enhan V X More 💌 🌶
FCS Standard	Letterhead		
Description			
Details			
✓ Information			
Name FCS Standard Letterhea	d	Description	
✓ Letterhead Content	t		
Header	FRAME	SHISE DUD TONS	
Footer {((Sender.Email_Signature_	c)))		
✓ System Information	n		
Created By	1/2020 2:18 PM	Last Modified By Last Modified	
FRANCHISE CLOUD SOLUTIONS		All 🔻 Q. Search Enhanced Letterheads and more	× 🖬 ? 🌣 😤 🚳
Business Manage	Home Chatter Accounts V Contacts V Jobs		Material Price Lists 🗸 Reports 🧹 * Recently Viewed   Enhan 🗸 X More 💌 🌶
FCS Standard Lo	tterhead		
Description			
Details			
✓ Information		Description	
FCS Standard Letterhead		escipion	
Header	FRANC	CHISE UD IONS	
Footer ({(Sender.Signaturec))}			
✓ System Information			
Created By	2020 2:18 PM	Last Modified By  Last Modified By Loryn Jenkins, 25/03/2020 4:46 PM	
ď	If you would like a c manager or system	change to the Standard Lette administrator.	erhead, speak to your field
<b>e</b>	There may be more mentation. If there is like to use. You can might choose to cre the facing page.	e than one Letterhead availa is, review each letterhead to add letterheads to any cus eate. <i>See</i> "How to create a c	able within your imple- o see which one(s) you might tom email template you sustom email template" on

## How to edit default email templates

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



Ask your system administrator to edit the templates for you.

### How to create a custom email template

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

- » customized header and footers
- » boilerplate text
- » variables that draw information from the 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.

	CLOUD	All 🚽 🔿 Saarch Salacforra		🗭 🥵
Bu:	App Launcher	email templates 🛛 😵		1
Today's I	∽ All Apps		1	
	All Marrie <b>2</b>		-	
	V All Items			
	Email Templates			
Recent F				
E. FC				
En FC				

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.

ormation	-	
* Email Template Name	Related Entity Type	
My Quote Email Template	None	•
Description	Folder	
	Private Email Templates	
ssage Content		
Subject	Enhanced Letterhead	
	Search Enhanced Letterheads	Q
HTML Value		
O Source     Font ▼     Size ▼     B     I     U     ▲ ▼     1≡		
		1
ditional Information		1
ditional Information Created By	Last Modified By	0

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.

New Ema	ail Template
Information	
* Email Template Name	Related Entity Type
My Quote Email Template	None
Description	Catalog Profile Check-In
Message Content	Contact
Subject	Course
	Customer Feedback
HTML Value	DocuSign Recipient Status
Source Font - Size - $\mathbf{B}  \mathbf{I}  \underline{\mathbf{U}} \mid \underline{\mathbf{A}}$ =	DocuSign Status
	Instructor
	Invoice
	dof
	Job Offer
	0
Additional Information	
Created By	Last Modified By
	Cancel Save

6. Enter an email subject line.

New Ema	il Template
Information	
* Email Template Name	Related Entity Type
My Quote Email Template	Job
Description	Folder Private Email Templates
Message Content	
Subject	Enhanced Letterhead
FCS Invoice - {{{FCS_OPSJobc.Name}}}	Search Enhanced Letterheads Q
HTML Value	
Source Font - Size - B $I \sqcup A$ - $\frac{1}{2}$ :	
	1
Additional Information Created By	Last Modified By
	Cancel Save

7. Select an appropriate letterhead.

ormation	
* Email Template Name	Related Entity Type
My Quote Email Template	Job
Description	Folder
	Private Email Templates
ssage Content	
Subject	Enhanced Letterhead
FCS Invoice - {{{FCS_OPSJobc.Name}}}	βearch Enhanced Letterheads Q
HTML Value	FCS Standard Letterhead
Source Font - Size - B I U A - 1= :=	~ _ ~
	0
ditional Information	
Created By	Last Modified By
	Cancel

You can review the available letterheads. *See* "How to review email template headers and footers" on page 198.

8. Enter boilerplate text into the HTML Value field.

New Em	ail Template
nformation	
* Email Template Name	Related Entity Type
My Quote Email Template	- dol
Description	Folder
	Private Email Templates
lessage Content	
Subject	Enhanced Letterhead
FCS Invoice - {{{FCS_OPSJobc.Name}}}	E FCS Standard Letterhead ×
HTML Value	
Source Font - Size - <b>B I U A</b> - $l_{z}$	
Dear ,	
Please find attached your quote for job .	
Feel free to contact me if you have any queries	or need further information about the work.
Thank you	
mank you,	
	0
dditional Information	
Created By	Last Modified By
	Cancel

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

New Email Template			
Information			
* Email Template Name	Related Entity Type		
My Quote Email Template	dof		
Description	Folder Private Email Templates		
Message Content			
Subject	Enhanced Letterhead		
FCS Invoice - {{{FCS_OPSJobc.Name}}}	E FCS Standard Letterhead ×		
HTML Value Source Font Size B I U A E E C Dear , Please find attached your quote for job . Feel free to contact me if you have any queries of Thank you,	r need further information about the work.		
Additional Information			
Created By	Last Modified By		
	Cancel Save		

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

*Email T Recipient   My Q Sender   Descript Organization   Job • # Contacts   Subject • Accepts Reference Calls   FCS Ir • Assistant's Name   Cont   Dear   Pleas   Feel 1   Than   • Contact Description   Contact Description   • Contact ID   • Created By ID	×
My Q     Recipient     Select Merge Field       Sender     Search Recipient merge fields       Organization     # Contacts       Job     Accepts Reference Calls       Subject     Assistant's Name       FCS Ir     Assistant's Name       Birthdate     Cont       Dear     Business Fax       Pleas     Business Phone       Contact Description     Cont       Contact ID     Cont       Contact ID     Cont	_
Sender Search Recipient merge fields   Descript Organization   Job <ul> <li># Contacts</li> <li>Cont</li> </ul> Message <ul> <li>Accepts Reference Calls</li> <li>Assistant's Name</li> <li>Cont</li> <li>Asst. Phone</li> <li>Cont</li> <li>Birthdate</li> <li>Cont</li> <li>Business Fax</li> <li>Cont</li> <li>Business Phone</li> <li>Cont</li> <li>Contact Description</li> <li>Cont</li> <li>Contact Description</li> <li>Cont</li> <li>Created By ID</li> </ul>	•
Organization <ul> <li># Contacts</li> <li>Cont</li> <li>Accepts Reference Calls</li> <li>Assistant's Name</li> <li>Cont</li> <li>Assistant's Name</li> <li>Cont</li> <li>Assistant's Name</li> <li>Cont</li> <li>Birthdate</li> <li>Business Fax</li> <li>Cont</li> <li>Business Phone</li> <li>Cont</li> <li>Contact Description</li> <li>Cont</li> <li>Contact ID</li> <li>Cont</li> <li>Created By ID</li> <li>Cont</li> <li>Cont</li> <li>Contact By ID</li> <li>Cont</li> <li>Cont</li></ul>	۹
Message       Accepts Reference Calls       Cont         Subject       Assistant's Name       Cont         FCS Ir       Assistant's Name       Cont         HTML Va       Asst. Phone       Cont         So       Birthdate       Cont         Dear       Business Fax       Cont         Pleas       Business Phone       Cont         Feel 1       Contact Description       Cont         Contact ID       Cont       Cont         Created By ID       Cont       Cont	ct
Subject       Assistant's Name       Cont         FCS Ir       Assistant's Name       Cont         HTML Va       Asst. Phone       Cont         So       Birthdate       Cont         Dear       Business Fax       Cont         Pleas       Business Phone       Cont         Than       Contact Description       Cont         Contact ID       Cont       Cont         Created By ID       Cont       Cont	ct
HTML Va       Asst. Phone       Cont         Image: So       Birthdate       Cont         Dear       Business Fax       Cont         Pleas       Business Phone       Cont         Feel 1       Contact Description       Cont         Than       Contact ID       Cont         Created By ID       Cont       Cont	ct
So     Birthdate     Cont       Dear     Business Fax     Cont       Pleas     Business Phone     Cont       Feel 1     Contact Description     Cont       Than     Contact Description     Cont       Contact ID     Cont       Created By ID     Cont	ct
Dear     Business Fax     Cont       Pleas     Business Phone     Cont       Feel 1     Contact Description     Cont       Than1     Contact Description     Cont       Contact ID     Cont     Cont       Created By ID     Cont	ct
Pleas     Business Phone     Cont       Feel 1     Contact Description     Cont       Than     Contact Description     Cont       Contact ID     Cont       Created By ID     Cont	ct
Thank     Contact Description     Contact       Contact ID     Contact     Contact       Created By ID     Contact	ct
Contact ID Cont	ct
Created By ID Cont	ct
	ct
Created Date Cont	ct
Additiona O Data.com Key Cont	ct
Created	ert

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

		New Email Template	
Informati		Insert Merge Field	
* Email T My Qu Descripti	Recipient Sender Organization	Select Merge Field	•
Message d Subject FCS Ir HTML Va Dear Pleas Feel 1 Thank		Franchise Name  Job Name  Last Name  Cancel Insert	X
		Cancel	Save
12. Enter as many merge fields as are appropriate to your template. Press **Save** when the template is complete.

New Er	nail Template
Information	
* Email Template Name	Related Entity Type
My Quote Email Template	Job
Description	Folder
	Private Email Templates
Message Content	
Subject	Enhanced Letterhead
FCS Invoice - {{{FCS_OPSJobc.Name}}}	FCS Standard Letterhead ×
HTML Value	
Source Font - 16 - B I U A. ↓	
Dear {{{FCS OPS Job c.FCS OPS First	Namec}}}.
Please find attached your quote for job {{{FCS_	_OPSJobc.Name}}}.
Feel free to contact me if you have any queries	or need further information about the work.
Thank you,	
	U.
Additional Information	× 1
Created By	Last Modified By
	Cancel Save
	Cancer

Ć

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

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.

## Working with emails and syncing

There are several different methods of coordinating how email operates between Salesforce and your email system. Please read "Understanding email sending, responses and syncing" below to obtain an overview of which method may be most appropriate for your organization.

### Understanding email sending, responses and syncing

When you send an email from Salesforce, a Salesforce email server will send the email on your behalf. The server that sends the email is not your usual company email server. Instead, it is a Salesforce server that claims to be from your personal email account.



Your system administrator has to specially configure both Salesforce and your company domain name systems to enable Salesforce to act on your behalf.

When a recipient responds to your email, the response will go to your personal email inbox (not to Salesforce). This means:

Outbound emails	Inbound emails
Sent by Salesforce server	Responds to your personal email inbox
Not stored in your personal email outbox	Not stored in Salesforce

If you did nothing else, your record of emails sent and received would be divided between these two systems. Fortunately, Salesforce provide a number of mechanisms to help overcome this divide.

#### Forwarding a record of sent emails to your email inbox

To ensure your email inbox has a record of all emails you send from Salesforce, you can choose to send emails to your inbox. *See* "How to send all emails to my inbox" on page 214.

#### Automatic capture of Salesforce-related emails

Salesforce provides a way to automatically capture emails relating to Salesforce contacts from within your personal email and to associate the email with matching record(s) in Salesforce. This feature is called **Einstein Activity Capture** (EAC).

If your system administrator configures EAC and you agree to use it:

- \* emails sent and received within your personal email inbox is captured by Salesforce and associated with records in Salesforce
- » emails captured by EAC will appear in the Activity Timeline beside each record

- » emails displayed in the Activity Timeline will, at your discretion, be visible to:
  - » only you
  - \* to people who belong to Salesforce groups (you select the groups who can see your emails), or
  - » everyone



#### EAC is not suitable for everyone

While EAC provides a convenient mechanism, there are potential downsides to using it.

- 1. Emails captured with EAC are transient. They are retained for between six and eighteen months (depending on whether your organization is using the free or paid version of EAC) after which they are discarded. If you wish to store emails in Salesforce permanently, you should explore other options.
- 2. Emails captured with EAC cannot be reported on. Emails that you send from Salesforce are stored in the Activity History and can be made the subject of reports. Emails that are captured by EAC are not stored in the Salesforce Activity History (even though they appear there) and cannot be made the subject of reports.
- 3. EAC does not respect Franchise Cloud Solutions' franchise data model. EAC is designed for use by a single organization and knows nothing about how Franchise Cloud Solutions products partition information between accounts or jobs, and between franchisors or franchisees.

Given the above considerations

- If you're involved in marketing or sales roles using Franchise Recruitment, EAC is suitable for use unless the available retention periods are too short to be useful.
- If you're involved in field management, operations or finance using Franchise Operations, EAC is not recommended for use as it will not associate emails with the most relevant custom objects.

If EAC is suitable for your use, your system administrator must configure the system and grant users access to EAC. Talk to your system administrator if you do not know whether this has been done.

#### Salesforce extensions for Office 365 and GSuite

If you decide that EAC is not suitable for your needs, you may prefer to use the Salesforce extensions for Office 365 and GSuite. The Salesforce extensions allow you to select which emails (and email threads) are stored in Salesforce. You also have control over which records they are stored against. In addition to pure capture of email, the Salesforce extensions for Office 365 and Chrome also provides access to Salesforce templates within your email inbox, increasing your productivity even when you're not in Salesforce itself.

- "Installing the Salesforce extension for Office 365" on page 216
- » "Installing the Chrome Salesforce extension for GSuite" on page 225
- » "Logging email using Salesforce extensions" on page 222
- \* "Logging events using Salesforce extensions" on page 229

#### Manual forwarding of emails to Salesforce

If you're a franchise recruitment specialist working with leads, contacts and opportunities, and primarily use your mobile for email communications, you may find the **Email to Salesforce** a convenient complement to the Salesforce extension.

**Email to Salesforce** provides a way of capturing emails against leads, contacts and opportunities from your phone. It is a good complement to Salesforce extensions, which work when using Outlook 365 or Google Mail and Calendar when using a Chrome browser.

- » "Configure My Email to Salesforce" on page 231
- » "Log emails using My Email to Salesforce" on page 233

#### How to send all emails to my inbox

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

To blind copy all emails to your email address

1. Go to View Profile and choose Settings.

FRANCHISE SOLUTIONS			Q Search			2	1 🔠 🛚 🔷 🕆 🕶 🕽
Business Managem	Home Ta	asks 🗸 Chatter	Accounts $\lor$ Jobs	✓ Job Calendar	Invoices 🗸 Contac	rts ∨ Audit	John Smith
							nfctrial01-dev-ed.my.salesforce.com
JobCalendar							Settings Log Out
Smith in Australia/Sydney timezone							USERNAMES
Search Jobs	<	Today >			No. 40 0000	Agenda L	Ioryn.jenkins@nfctrial01.demo nfctrial01-dev-ed.my.salesforce.com
Search term		Nov 06 – 12, 2022					
Job Number or J Search		Sun 8/11 Mon 7/11 Tue 8/11 Wed 9/11 Thu 10/11			auditorg.my.salesforce.com		
Showing first 25 results.	all-day						DISPLAY DENSITY
> .IN-00619	7am						✓ Comfy
Created by Quick Job, Ringwood	Sam						Compact
> JN-00464	Guin						OPTIONS
Painting - Sonnen, Ringwood	9am						Switch to Salesforce Classic ()
> JN-00618 Created by Ouick Job	10am						Add Username

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

FRANCHISE	Q. Search	🛚 🕼 ? 🌣 🖡 🌔
Business Managem	Home Tasks v Chatter Accounts v Jobs v Job Calendar Invoices v Contacts v Audits v Payments v Re	aports ∨ More ▼
Q, Quick Find	🔯 My Ernali Settings	
<ul> <li>My Personal Information</li> </ul>		
Advanced User Details Approver Settings	My Email Settings	Help for this Page 🥹
Change My Password	Outgoing Email Settings	Required Information
Connections		
External Credentials	Send through Salesforce	
Grant Account Login Access	Email Name John Smith	
Language & Time Zone	What email address would you like to use as your return address?	
Login History	Would you like to automatically BCC emails to your return address?	
Personal Information	Automatic Boc 🛛 🔞 Yes 🔾 No	
Reset My Security Token	Signature	
Security Central	This signature will be added to your outgoing emails (1333 characters max):	
> Display & Layout	{{Sender Email_Signaturec}}	
∨ Email	2	
My Email Settings		
My Email to Salesforce		
My Unresolved Items	Note: All outgoing emails will contain a "Powered by Salesforce" tag line at the bottom. This tag can be removed in the paid Editions of the product.	
> Chatter	Subscriptions	
> Calendar & Reminders	Receive Salesforce CRM Content Email Alerts     Tecoche Salesforce CRM Content Alerts	
> Desktop Add-Ons	C RECEIVE SAREETORE CRM CONTERN AND A LARY DIGHTA 1	
> Import	Save	

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

1	FRANCHISE			Q Search						**	🖬 🗠 ? 🌣	. I I I I I I I I I I I I I I I I I I I
	Business Managem	Home Tasks 🗸	Chatter	Accounts $\lor$	Jobs $\lor$	Job Calendar	Invoices $\lor$	Contacts $\checkmark$	Audits $\lor$	Payments $\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!$	Reports 🗸 More	÷.,
Q 2 M	Quick Find	🔯 My E	mail Settir	ngs								
	Advanced User Details Approver Settings	My Email s	Settings								Help for th	his Page 🥹
	Change My Password	Outgoing Emai	I Settings								= Required in	vormation
	Connections											
	External Credentials	Send through Sa How would you like	lesforce e wer name to s	inneer on your outor	ing email?							
	Grant Account Login Access	non nous jou m	Email Nam	John Smith								
	Language & Time Zone	What email addres	is would you like Email Address	to use as your retur	n address?							
	Login History	Would you like to a	automatically BC	C emails to your retu	im address?	4	1					
	Personal Information		Automatic Boc	i Yes								
	Reset My Security Token	Signature										
	Security Central	This signature will F	be added to you mail Signature	r outgoing emails (1	333 characters	max):						
> D	isplay & Layout			{{{Sender.Email_3	ignaturec}}							
∨ Er	nail											
	My Email Settings											
	My Email to Salesforce											
	My Unresolved Items	Note: All outgoing	emails will conta	in a "Powered by Sa	lesforce" tag lir	e at the bottom. This	ag can be removed	I in the paid Editions	of the product.			
> C	hatter	Subscriptions										
> C	alendar & Reminders	Receive Sales	force CRM Cont force CRM Cont	ent Email Alerts 👔 ent Alerts as Daily D	inest 🕡	-	2					
> D	esktop Add-Ons	. acere care		unit to a bary b	.g 💽							
> In	nport				Save	Cancel						

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

#### Granting EAC sync permission

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

Before you agree, you should understand whether your administrator

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

### Installing the Salesforce extension for Office 365

The Salesforce extension for Office 365 provides you control as to

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

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

To install the Salesforce extension for Office 365

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



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

	Outlool	k 🖉 Se	earch	🖙 Teams call 🖣 🛱 🗘 🔘 ? 🖘	
	=	Settings	Layout	istomize actions ×	
88 19 19 19 19 19 19 19 19 19 19 19 19 19	→ Fa 日 日 日 日 日 日 日 日 日 日 日 日 日	Search settings     General     Mai     Calendar     A <sup>a</sup> Reople     Vew quick settings	Compose and reply Attachments Rules Sweep Junk email Customize actions Sync email Message handling Forwarding Automatic replies Retention policies SyMIME Groups To Ch	sexes surface to a cation a and a for you want to see when you solect a mensupe to real.	

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

-	Outlook	𝒫 Search	다 Teams call <b>6] 다</b> 유 🐵 ? <디 (5)
	New message	🗊 Delete \Xi Archive 🖉 Junk 🗠 🍕 Sw	veep 🐻 Move to 🔨 🖉 Categorize Y 💿 Snooze Y 🦻 Undo \cdots
	✓ Favorites	⊘ Focused Other	Please review the completed actions
8	🕞 Inbox	Loryn Jenkins     Please review the completed 7.05 AM	👝 Loryn Jenkins 🔊 🕒 🗄 🐁 న న న 🔿 …
Ø	▷ Sent items	CAUTION: This email originated from o	To: FCS Support Wed 29/06/2022 7:05 AM
~	🕅 Drafts		CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless
FR	Add favorite		you recognise the sender and know the content is safe.
ω.	✓ Folders		Hi there
	🕞 Inbox		I've completed my actions from the audit. Please review them and mark them as complete when you are
	🕅 Drafts		satisfied.
	➢ Sent Items		Regards,
	Deleted Items		Loryn Jenkins
	🖏 Junk Email		
	Archive		+61 431 661 077
	Notes		
	Conversation His		www.manchisectoudsolutions.com
	New folder		
	✓ Groups		Kepiy A Forward
	New group		
	Discover groups		

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

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

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

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

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



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



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



#### Congratulations

You have completed the configuration. Now whenever you click on a message, you'll be able to see the Salesforce add-in, which will allow you to file any email message (or event, if event syncing has been configured) against selected records within Salesforce.



### Logging email using Salesforce extensions

When you open an email with the Salesforce extension open, the Salesforce extension presents you with the opportunity to log the email into Salesforce against one or more records. By default, you can log the email against a person (**Contact** or **Lead**) and against another object (typically **Opportunity**, or **Account**). You can also choose to log an email against a single object if you do not wish to log the email against a person.

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

To log an email against a person

1. With your email open and the Salesforce pane opened, select the Log Email button.



2. The system will attempt reasonable guesses as to which records are involved with this email. It will list the people and/or other records to which this email might be related.



3. If you need to add more people to the list, you can search to find other people or other records. Enter your search term in the search box, and choose from the records appearing in the drop-down list.

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4. Once you have the right records in the list, check or uncheck the boxes to achieve the right checked items, then press **Submit**.



### Installing the Chrome Salesforce extension for GSuite

The Salesforce extension for Chrome provides you control as to

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

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

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

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

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About Chrome		

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

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



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

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



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

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Overview Privacy practices Reviews Related	I orynjenkinst@grunt.com

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

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

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10. The Salesforce extension for Chrome now appears in the sidebar of your web browser. Click on the Salesforce cloud icon to expand the sidebar.

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### Logging events using Salesforce extensions

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

#### To log an event to a Salesforce record

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

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

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### **Configure My Email to Salesforce**

You can configure email to Salesforce to allow you to conveniently forward emails from your mobile to Salesforce for messages relating to a Lead, Contact or Opportunity. This is most useful for recruitment.

To configure My Email to Salesforce

1. In Salesforce, open View Profile and then select Settings.

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2. From the menu, select My Email to Salesforce.

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Business Managem	Nome Chatter Accounts V Jobs V Job Offers V Jo	Calendar Invoices V Payments V C	Customer Feedback 🗸 Contacts 🗸	Material Price Lists $ arphi $ Files $ arphi $ Reports $ arphi $	Dashboards v Calendar v Tasks v More * ,
	_				
Q, Quick Find	Personal Information				
V My Personal Information					
Advanced User Details	Personal Information				Help for this Page 😣
Approver Settings					
Authentication Settings for External Systems	Details				<ul> <li>Required information</li> </ul>
Change My Password	Last Name Miler	-			
Connections	Alles kmie				
External Credentials	linal kenyn mier@ha	chisec			
Grant Account Login Access	Uservane kanya miangitanchi Mickeane	ecloudsolutions.com.mittelal			
Language & Time Zone	Prese				
Login History	Extension				
Personal Information	Fax				
Security Central	Mobile 0401 023 045				
> Display & Layout	Addana .				
v final					
My Email Settings	Street				
My Email to Selesforce	City				
My Unresolved Items	Bials Province				
> Chatter	Zip/Postal Code				
> Calendar & Reminders	Deality				
> Desktop Add-Ons	My Work Information				
> Import	Company Name Franchise Cloud	Solutio			
	Title Recruitment Man	aper			
	Department				
	Division				
	Employee Humber				
	Start of Day 6:00 AM				
	1130 PM V				
		Save Canoel			

 In the My Email to Salesforce page configure it according to your needs. Add your email address (or email addresses, if you have more than one). Check Opportunities. Add email to All records when there is a duplicate. Check Always save mail attachments. When you're done, press Save.



4. Once you have saved, copy the Your Email to Salesforce address.

CLONER CLONER	0, Seath									
Business Managem	Home Chatter Accounts v Jobs v Job Collens v Job Collendar Involves v Reyments v Customer Feedback v Contacts v Maximal Price Lists v Files v Reports v Databoards v Calendar v Tasks v More v									
Q, Quick Find	to My Email to Salesforce									
v My Personal Information	—									
Advanced User Details Approver Settings	Your Final is Sainform address and an and a statistical distribution and address and a statistica and a									
Authentication Settings for External Systems	Ny Enaito Salestoros San Cool									
Change My Password Connections External Credentials	Einer ble Frait is Sandvers aktimus i het left Gan uf meink het pris verti and til het sandvig klaup of värand sonste. Frai i se annoteste provensel en all aktivus. Eine la Sandvers Johnen - enskulskehenge Stad Auford Stad Stad Stad Stad Stad Stad Stad Sta									
Grant Account Login Access Language & Time Zone	By Acceptable Ernall Addresses									
Login History Personal Information Security Central	Enter al mail addresses for you as a mail ada not antice, second op anno Colymania ser from an anna adam pou quido, balor antio adaint à tra such you for adaint ancres. Bit y komptetin Such Addresses. Adapting and adapting									
> Display & Layout	Envil Associations									
<ul> <li>Email</li> <li>My Email Settings</li> </ul>	When which are sent to adultative conv.									
My Email to Salesforce	Analysis and here is by <u>Accelerationals</u> and <u>analysis</u> and analysis and a									
My Unresolved Items	Construction     Final is associated with all of the constructions associated with all of the constructions									
> Chatter										
<ul> <li>Calendar &amp; Reminders</li> <li>Desktop Add-Ons</li> </ul>	Contract     Or The second read     Or The second read     Or The second read read									
> import	For matching recent are bard, crucia a last for each receiver and aread In by <u>Hysternational Jerra</u>									
	C Reaps serve renal interfacements C Enail ne confirmation of susception									
	Etri che di nengo posi dell'arte la sociale, supposi eti posi della di nella di anti di nella									
	form Canval									

5. Now, on your mobile phone, create a new contact and paste the copied address into the email address for that contact. Make sure the contact has a memorable name, like "Salesforce".

10:51			ul 🗟 🖿
Contacts			Edit
	Sales	force	
message	call	Ul video	mail
work emailtosales	force@2	3st5uhzwti8	c0jzqu7
Notes			
Send Messa	ge		
Share Conta	ct		
Add to Favou	urites		
Share My Lo	cation		
Add to List			

You've now configured My Email to Salesforce. Next discover how it is used, *See* "Log emails using My Email to Salesforce" below.

### Log emails using My Email to Salesforce

If you're a franchise recruitment specialist working with leads, contacts and opportunities, and primarily use your mobile for email communications, you may find the **My**  **Email to Salesforce** a convenient way to log emails when you're using your mobile on the go.

**My Email to Salesforce** provides a way of capturing emails against leads, contacts and opportunities from your phone. My Email to Salesforce is best suited to logging emails to Salesforce when you're on your mobile. One of its limitations is that any email logged through this method is stored text-only. Images or other attachments are not captured through this method.

**My Email to Salesforce** is a good complement to Salesforce extensions, which do capture images and attachments within logged emails.

To log emails from your mobile using My Email to Salesforce

- 1. In your mobile phone's email app, create a new email.
- 2. Add your recipient, subject and email body.
- 3. In the BCC field, add the Salesforce contact. *See* "Configure My Email to Salesforce" on page 231.

10:54 🛙 🗤 🗟 🗩
Cancel
Want to meet next Wednesday 个
To: demo@franchisecloudsolutions.com
Cc:
Bcc: Salesforce
From: lorynj@gmail.com
Subject: Want to meet next Wednesday
Hi there
I'll be in your area next Wednesday, want to meet?
Best regards, Loryn Jenkins
mobile: 0431 661 077

4. When you're ready, press Send.

### Congratulations

You have now logged your email, including any attachments, to related Salesforce records.

## 

 Y 

# Working with Campaigns

Introducing campaigns	238
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How to populate leads from your website	241
How to control the campaigns that appear in the online form	241
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## Introducing campaigns

Campaigns allow you to track the effectiveness of your marketing activities over time. Using campaigns, you can understand the investment and returns of each marketing activity. You can even build campaign hierarchies so that you can track performance across multiple campaigns.

Within Franchise Recruitment, the names of campaigns appear within a web form on your website. The web form allows prospects to register their interest in purchasing a franchise or registering for potential employment. These entries are automatically populated into Salesforce.

## How to set up a new campaign



You need to have Marketing User checked in your user information. Your system administrator will need to set this for you.

#### To set up a new Campaign

1. From the Campaigns tab, press New.

8				Q	Search Camp	aigns and more.			1		* 🖬 ? 🌣 🐥 🤇	6	
Fr	ranchise Recruitm	Home	Chatter	Leads 🗸	Accounts N	<ul> <li>Contacts</li> </ul>	✓ Oppo	tunities 🗸	Contracts 🗸	Campaigns 🗸	Territories 🗸 More 🔻		
4 items • 1	Campaigns Recently Viewed 🔻	, )))))(( <i>(</i>	7885-	'11( - 777	//////////////////////////////////////		(7 )	8211 (- 2			8 * Ⅲ · C / C		
(	CAMPAIGN NAME				✓ P.	ARENT CAMPAI	GN 🗸	TYPE	~	STATUS	✓ START DATE	$\sim$	
1	User Conference - Jun 17-19,	2018						Conferenc	e	Planned	17/06/2018		
2 1	International Electrical Engineers Association Trade Show - Mar 4-5, 2018							Trade Show Planned			4/03/2018		
3	DM Campaign to Top Custom	ers - May 1-	18, 2017					Direct Mai		Completed	1/05/2017		
4	GC Product Webinar - Jan 7, 2	017						Webinar		Completed	3/07/2017		

2. Complete the New Campaign dialog box.

» Enter Campaign Information details.

Campaign Information	
Campaign Owner Marketing	Status Planned
* Campaign Name	Campaign Category 🕕
Franchise Sales Direct Marketing List	Franchise Sales
Active	Country 🚯
	Australia 🗸
Туре	State 🕕
Direct Mail 🔹	ACT NSW
	NT
Parent Campaign           Image: NSW Q1 Franchise Sales Drive         ×	CAI
Description	
Direct mail to purchased list of pre-qualified potential leads.	

If this Campaign forms part of a larger Campaign, then select that Campaign in the Parent Campaign field.

» Enter Planning details, ensuring you enter a Start Date and End Date.

Planning	
Start Date	Expected Revenue in Campaign
1/01/2018	565,000
End Date	Budgeted Cost in Campaign
31/03/2018	7,500
Num Sent in Campaign	Actual Cost in Campaign
5,000	
Expected Response (%)	
7.50%	
System Information	
Campaign Record Type Recruitment Campaign	

3. Press Save.

Salesforce now shows you your new Campaign record.

## How to populate leads from your website

During installation Franchise Cloud Solutions consultants will discuss your campaign requirements and configure all the necessary campaigns. Over time you may need to configure new campaign with the right settings to make the campaign visible on the website.

Campaign names that are visible appear in the question that by default is named, "How Did You Hear of Us?". This field may be customized with a different name on your website.

### How to control the campaigns that appear in the online form

To make a campaign appear on the web form, set the Campaign field values as follows.

Campaign field	Value
Campaign Record Type	Recruitment Campaign
Campaign Category	Franchise Sales
Status	In Progress
Active	True

Selection of values by web form users restricts the campaigns displayed in the question "How Did You Hear of Us?".

Field on web form	Affects visibility of campaigns by
Country of Interest	Excluding campaigns set to countries other than the Country of Interest.
State of Interest	<b>Excluding campaigns set to states other than the</b> State of Interest.

Remember to add at least one catch-all campaign like *Word of Mouth* or *Other*.

## How to create parent and child campaigns

Campaigns can be formed into a hierarchy in order to give you precise reporting as to which campaigns are best driving results.

To make a campaign form part of a hierarchy you give it a Parent Campaign. *See* "How to set up a new campaign" on page 239.

If you don't want a Parent Campaign to appear on the public website, set its Active field to *False*.

To learn more about controlling which Campaigns appear on the web form, *See* "How to populate leads from your website" on the previous page.

### How to see a report on hierarchical campaign performance

In the Campaign Detail page, Hierarchy ROI gives you a summary of the return on investment of the current Campaign summed with the ROI of all its child campaigns. To see a more detailed report, look up the standard Salesforce report "Campaign ROI Analysis Report" (found in the Salesforce Marketing report folder).

## How to mark a lead as belonging to a campaign

You add a lead to a campaign by making the Lead a Campaign Member.

How to add a Lead as a Campaign Member

1. From the **Leads** tab, open a Lead.

8		ป	_	Q	Search Le	ads and	more								*	•?	ţ, t	6
***	Franchise Recruitm	Home	Chatter	Leads 🗸	Accounts	~	Contacts	$\sim$	Opportunities	~	Contracts $\checkmark$	Camp	baigns	V T	erritories 🗸	More	•	
3 item	Leads Recently Viewed -	2	71435-2	']](_ <i>771</i>	2-5 H (			117	/!\\\\*/// (		//\\\\\\ / /	11:111	( 	New	Import \$ •	Chang C <sup>1</sup>	ge Status	<ul> <li>▼</li> <li>▼</li> </ul>
	NAME	TITLE	$\sim$	COMPANY	~	PHON	E	$\sim$	MOBILE	$\sim$	EMAIL	$\sim$	LEAD	STATUS	v ov	/NER ALI	AS 🗸	
1	Bob Smith								0431661889		b.smith@handy	wor	New		sal	e		•
2	Deborah Harriss								0404809635		deb.harr@gmai	l.co	New		sal	e		•
3	Phuong Ngo								0404778678		phuong.ngo@g	.com	New		sal	e		•

The Lead page appears.

2. Click on the **Related** tab.

<b>®</b>	Q Search Leads and more	🖈 🖬 ? 🌣 🐥 👼
Franchise Recruitm Home Chatter	Leads V Accounts V Contacts V Opportunities V Contra	icts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Head Mr. Bob Smith	Multer Constant for the Multer Constant	+ Follow Edit Delete Change Owner V
Position Current Employer Mobile Franchise Sales 043166	Email 1889 b.smith@handyworks.com.au	
New     Contacted	In Progress Exhausted	Converted Vark Status as Complete
DETAILS RELATED		ACTIVITY CHATTER
✓ Lead Information		Log a Call New Event New Task Email
Name Mr. Bob Smith	Lead Owner	Create new Add
Mobile 0431661889	Lead Status New	
Email b.smith@handyworks.com.au	Lead Source Phone	Activity limeline
Position 0 Franchise Sales	Initial Contact Date	No next steps
Current Employer 🚯	Hours Since Creation 0 0.00	meeting.

3. Press Add to Campaign.

<b>®</b>	Q Search Leads and more		*• 🖬 ? 🌣 🜲 👼
Franchise Recruitm Home Chatter	Leads 🗸 Accounts 🗸 Contacts 🗸	Opportunities 🗸 Contract	ts 🗸 Campaigns 🗸 Territories 🗸 More 💌 💉
Mr. Bob Smith			+ Follow Edit Delete Change Owner V
Position Current Employer Mobile Franchise Sales 043160	Email 51889 b.smith@handyworks.com.au		
New Contacted	In Progress	Exhausted	Converted  ✓ Mark Status as Complete
DETAILS RELATED			ACTIVITY CHATTER
o Campaign History (0)		Add to Campaign	Log a Call New Event New Task Email
Files (0)		Add Files	Create new Add
			Activity Timeline
	1 Upload Files		Next Steps ····· More Steps
	Or drop files		No next steps. To get things moving, add a task or set up a meeting.
			Past Activity

- 4. From the Choose a Campaign dialog box, select the Campaign you want to add this Lead to.
- 5. Press Next.

You have now created a Campaign Member. The Lead is added to the Campaign.

## How to mark many existing leads as campaign members

Sometimes you want to add many Lead records that already exist within Salesforce to a campaign. You do this by running a report and making all report results become members of the campaign. *See* "How to add report results as campaign members" on page 273.

## 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. Contact your system administrator about importing leads from other systems.
# **Working with Activity Lists**

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# **Understanding activity lists**

Implementing a repeatable process is essential to everything from sales processes to handover to the franchise operations team. Activity lists are a big help in implementing this repeatable process.

At its heart, an activity list contains a list of tasks. The tasks can be automatically assigned to individuals to be completed within a certain time-frame.

Using an activity list ensures that all the same tasks get done in the same way each and every time.



While most activity lists are created manually, during implementation your company may have chosen to have an activity list automatically created. Check with your implementation notes.

# 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.

8	Q Search Accounts and more	** 🖬 ? 🐥 🐻
Franchise Recruitm Home Chatte	er Leads 🗸 Accounts 🗸 Contacts 🗸 Oppo	rtunities 🗸 Contracts 🗸 Campaigns 🗸 Territories 🗸 More 🔻 🖋
Account FCS Newtown Billing Address 18 Magnus Avenue Sinclair WA 7885	eason	+ Follow Edit Delete View Account Hierarchy
Australia		
DETAILS RELATED		ACTIVITY CHATTER
Account Name FCS Newtown	Account Owner	Log a Call New Event New Task Email
Parent Account	Email	
Status Inactive	Phone 0448997335	Create new Add
Timezone	Fax	Activity Timeline
Next Review Due Date		Next Steps More Steps
Next Review Date		No next steps. To get things moving, add a task or set up a meeting.
✓ Business Information		Past Activity
Legal Entity Name FCS Newtown Pty Ltd	Business Number 49 389 782 542	No past activity. Past meetings and tasks marked as done
Trading Name FCS Newtown	Company Number	Load More Past Activities
Operating Structure Company		
✓ Address Information		Activity Lists Add List
Billing Address 18 Magnus Avenue Sinclair WA 7885 Australia	Shipping Address	NAME NUMBER OF TASKS COMPLETED TASKS

To apply an activity list:

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

O↓ O↓ O↓ Franchise Recruitm Home Chatter	Q Search Accounts and more  rr Leads  Accounts  Contacts  Opportunities  Oppo	Contracts v Campaigns v Territories v More v 🖍
Account FCS Newtown Billing Address Status Status Re 18 Magnus Avenue Inactive Sinchair WA 7885 Australia	ason	+ Follow Edit Delete View Account Hierarchy
DETAILS RELATED		ACTIVITY CHATTER
Account Name FCS Newtown	Account Owner	Log a Call New Event New Task Email
Parent Account	Email	
Status Inactive	Phone 0448997335	Create new Add
Timezone	Fax	Activity Timeline
Next Review Due Date		Next Steps More Steps
Next Review Date		No next steps. To get things moving, add a task or set up a meeting.
✓ Business Information		Past Activity
Legal Entity Name FCS Newtown Pty Ltd	Business Number 49 389 782 542	No past activity. Past meetings and tasks marked as done
Trading Name FCS Newtown	Company Number	Load More Past Activities
Operating Structure Company		
✓ Address Information		Activity Lists
Billing Address 18 Magnus Avenue Sinclair WA 7885 Australia	Shipping Address	NAME NUMBER OF TASKS COMPLETED TASKS

The New Activity List dialog box appears.

2. Select an available Template.

New Activity List				
Activity List Name     Enter your Activity List name      Related Record Id     0017F00000YnzINQAR	*Template ✓None Franchisee On-boarding Process Growth Visit Template			
	Cancel Save			

3. Enter the Activity List Name and press Save.

	New Activity List	
Activity List Name	* Template	
FCS Newtown On-boarding	Franchisee On-boarding Process	•
*Related Record Id		
0017F00000YnzINQAR		
		Cancel Save

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

8		Q Search Accounts and more		* = ? + 👼
Franchise Recruitm Home Chatter Leads 🗸	Accour	nts 🗸 Contacts 🗸 Opportunities 🗸 Contracts 🗸	🗸 Campaigns 🗸	Territories V Dashboards V Reports V More V
FCS Newtown				+ Follow Edit Delete View Account Hierarchy
aliing Address Status Status Heason 18 Magnus Avenue Inactive Sinclair WA 7885 Australia				
DETAILS RELATED				ACTIVITY CHATTER
Account Name FCS Newtown Page 4 Securit		Account Owner		Log a Call New Event New Task Email
Status Inactive		Phone 0448997335		Create new Add
Timezone		Fax		Activity Timeline
Next Review Due Date				Next Steps More Steps
Next Review Date				> 🔚 🗌 New Franchisee Induction course 27/03 💌
✓ Business Information				You have an upcoming Task
Legal Entity Name FCS Newtown Pty Ltd		Business Number 49 389 782 542		You have an upcoming Task
Trading Name FCS Newtown		Company Number		Past Activity
Operating Structure Company				No past activity. Past meetings and tasks marked as done show up here. Load More Past Activities
✓ Address Information				
Billing Address 18 Magnus Avenue Sinclair WA 7885 Australia		Shipping Address		Add List Add List NAME NUMBER OF TASKS COMPLETED TASKS
✓ System Information				FCS Newtown On-boarding 5 0
Created By		Last Modified By		
Master Franchise FCS NSW		Account Record Type Franchise Profile		
Account Currency Australian Dollar				

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

## Working with activity list tasks

Tasks generated by an activity list appear in the object's **Activity Next Steps**. They also appear on the Salesforce home page of the task owner, under **Today's Tasks**.

<b>®</b>	Q Search Accounts and more	** 🖬 ? 🜲 👼
Franchise Recruitm Home Chatter Leads $\checkmark$	Accounts V Contacts V Opportunities V Contracts V Campaigns V	🗸 Territories 🗸 Dashboards 🥆 Reports 🗸 More 💌 🖋
Account     Account     FCS Newtown     A  Billing Address     Status     Status Reason     Is Magnus Avenue     Inactive     Sinclar WA 7885		+ Follow Edit Delete View Account Hierarchy
Australia		
DETAILS RELATED		ACTIVITY CHATTER
Account Name FCS Newtown	Account Owner	Log a Call New Event New Task Email
Parent Account	Email	
Status Inactive	Phone 0448997335	Create new Add
Timezone	Fax /	Activity Timeline
Next Review Due Date		Next Steps More Steps
Next Review Date		> 🖆 🗌 New Franchisee Induction course 27/03 💌
✓ Business Information		You have an upcoming Task
Legal Entity Name FCS Newtown Pty Ltd	Business Number 49 389 782 542	You have an upcoming Task
Trading Name FCS Newtown	Company Number	Past Activity
Operating Structure Company		No past activity. Past meetings and tasks marked as done show up here.
✓ Address Information		
Billing Address 18 Magrus Avenue Sinclair WA 7885 Australia	Shipping Address	Activity Lists Add List
✓ System Information		FCS Newtown On-boarding

To view more details about an individual task:

» Click the task arrow to reveal more information.

®.	Q Search Accounts and more	** = ? + 👼
Franchise Recruitm Home Chatter Leads 🗸	Accounts V Contacts V Opportunities V Contracts V Campaign	s 🗸 Territories 🗸 Dashboards 🗸 Reports 🗸 More 🔻 🖋
Account     FCS Newtown     A		+ Follow Edit Delete View Account Hierarchy
18 Magnus Avenue Inactive Sinclair WA 7885 Australia		
DETAILS RELATED		ACTIVITY CHATTER
Account Name FCS Newtown Damped Account	Account Owner	Log a Call New Event New Task Email
Status	Phone	Create new Add
Timezone		Activity Timeline
Next Review Due Date		Next Steps More Steps
Next Review Date	_1	
✓ Business Information		Description
Legal Entity Name FCS Newtown Pty Ltd	Business Number 49 389 782 542	The franchisee owner is booked into the induction training course.
Trading Name FCS Newtown	Company Number	Subscription State
Operating Structure Company		Past Activity
✓ Address Information		No past activity. Past meetings and tasks marked as done show up here.
Billing Address 18 Magnus Avenue Sinclair WA 7885 Australia	Shipping Address	Load More Past Activities
✓ System Information		Activity Lists Add List
Created By Created By REC Sales Manager, 17/03/2018 2:58 AM	Last Modified By	NAME NUMBER OF TASKS COMPLETED TASKS FCS Newtown On-boarding
Master Franchise FCS NSW	Account Record Type Franchise Profile	
Account Currency Australian Dollar		

To reveal more tasks:

» Press More Steps.

Image: State of the s		Q. Search Accounts and more	) 	🖈 🖬 ? 4	. 6
Account     Account     FCS Newtown     A	ACCOU	is Contacts Copportunities Contracts Campag	15 🗸 1	+ Follow Edit Delete View Account Hier	archy
18 Magnus Avenue Inactive Sinclair WA 7885 Australia					
DETAILS RELATED				ACTIVITY CHATTER	
Account Name FCS Newtown Parent Account		Account Owner Control		Log a Call New Event New Task Email	
Status Inactive		Phone 0448997335		Create new	dd
Timezone		Fax		Activity Timeline	nd All
Next Review Due Date				Next Steps	
Next Review Date			1	Size Operations & OH&S Documents 27/03	3 💌
✓ Business Information				You have an upcoming lask V C New Franchisee Induction course 27/03	3 🛡
Legal Entity Name FCS Newtown Pty Ltd		Business Number 49 389 782 542		You have an upcoming Task	
Trading Name FCS Newtown		Company Number		The franchisee owner is booked into the induction training course.	g
Operating Structure Company				Issue New Franchisee Information Tomorrow     You have an upcoming Task	v 💌
✓ Address Information			- L	Past Activity	
Billing Address 18 Magnus Avenue Sinclair WA 7885 Australia		Shipping Address		No past activity. Past meetings and tasks marked as done show up Load More Past Activities	here.
✓ System Information					
Created By		Last Modified By		Activity Lists	d List
Master Franchise FCS NSW		Account Record Type Franchise Profile		NAME NUMBER OF TASKS COMPLETED T	TASKS
Account Currency Australian Dollar				- contention of bolining	

To mark a task as complete:

» Check the task check box.

0		Q Search Accounts and more		*• <b>=</b> ? + 👼
Franchise Recruitm Home Chatter Lead	s 🗸 Accounts	✓ Contacts ✓ Opportunities ✓	Contracts 🗸 Campaigns 🗸	Territories 🗸 Dashboards 🗸 Reports 🗸 More 🔻 🖋
FCS Newtown				+ Follow Edit Delete View Account Hierarchy
Billing Address Status Status Reason 18 Magnus Avenue Inactive Sinclair WA 7885 Australia				
DETAILS RELATED				ACTIVITY CHATTER
Account Name FCS Newtown		Account Owner		Log a Call New Event New Tack Empil
Parent Account		Email		
Status Inactive	, F	Phone 0448997335		Create new Add
Timezone		Fax		Activity Timeline
Next Review Due Date				Next Steps More Steps
Next Review Date				> 5 Issue Operations & OH&S Documents 27/03
v Rusiness Information				You have an upcoming Task
Legal Entity Name FCS Newtown Ptv Ltd	E	Business Number 49 389 782 542		V Rev Franchisee Induction course 27/03 Vou have an upcoming Task
Trading Name FCS Newtown		Company Number		Description The franchisee owner is booked into the induction training course.
Operating Structure Company				Issue New Franchisee Information Tomorrow     You have an upcoming Task
✓ Address Information				Doct Activity
Billing Address 18 Magnus Avenue Sinclair WA 7885 Australia	5	Shipping Address		No past activity. Past meetings and tasks marked as done show up here.
✓ System Information				
Created By	L	Last Modified By	AM	Activity Lists Add List
Master Franchise FCS NSW	/ / F	Account Record Type Franchise Profile		NAME NUMBER OF TASKS COMPLETED TASKS
Account Currency Australian Dollar				FCS Newtown On-boarding

When the task has been checked, the task name is struck out to indicate that it has been completed.

When you reload a record with a completed task, the completed task appears within the **Past Activity**.

⑧	Q.     Search Accounts and more       Accounts v     Contracts v     Opportunities v     Contracts v     Campaigns v	Territories V Dashboards V Reports V More V
Account FCS Newtown A Billing Address Status Status Reason 18 Magnus Avenue Inactive Sinclair VA 7865 Australia		+ Follow Edit Delete View Account Hierarchy
DETAILS RELATED Account Name FCS Newtown Parent Account Status Inactive	Account Owner	ACTIVITY CHATTER           Log a Call         New Event         New Task         Email           Create new         Add
Timezone Next Review Due Date Next Review Date X Business Information	Fax	Activity Timeline        The second all       Next Steps       More Steps       Issue Operations & OH&S Documents       27/03       You have an upcoming Task
Legal Entity Name FCS Newtown Pty Ltd Trading Name FCS Newtown Operating Structure Company	Business Number 49 389 782 542 Company Number	See New Franchisee Information Tomorrow      You have an upcoming Task Past Activity      Mew Franchisee Induction course 27/03      You had a Task
Address Information Billing Address 18 Magnus Avenue Sinclair WA 7885 Australia	Shipping Address	Load More Past Activities V
System Information Created By EC Sales Manager, 17/03/2018 2:58 AM Master Fanchise FCS NSW Account Currency Australian Dollar	Last Modified By CREC Sales Manager, 17/03/2018 3:30 AM Account Record Type Franchise Profile	NAME NUMBER OF TASKS COMPLETED TASKS FCS Newtown On-boarding

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# Working with Reports

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How to add report results as campaign members	

# **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.

8				Q	Search Reports a	nd more					3? 🖡 🐻
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There you will see each of the different categories of report that come with Franchise Recruitment.

3. Select any one of the report folders.

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Now you can see the reports within that folder.

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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.

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# **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 Rev- enue by Campaign	Detailed breakdown of opportunities by campaign.
Expected Rev- enue 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 Cam- paign	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**

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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**.

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Reports <b>Recent</b> 13 items				ส		New Report
REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCI	
Recent	Opportunity Pipeline	Opportunity Pipeline Report	Sales Reports	Integration User		
Created by Me	Converted Leads by Month		Marketing Reports	Integra		Run
Private Reports	Compliance - 14 Days from		Compliance Reports	Integration User		Edit
Public Reports	Campaign ROI Analysis Rep		Marketing Reports	Integration User		Subscribe
All Reports	Lead Conversion		Marketing Reports	FCS Sys Admin		Export
FOLDERS	Upcoming Renewals - Next		Compliance Reports	Integration User		Favorite
Created by Me	Upcoming Renewals - Next		Compliance Reports	Integration User		
Shared with Me	Territories With Buy Back Co		Sales Reports	Integration User		
All Folders	Territories For Resale		Sales Reports	Integration User		•
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All Favorites	Opportunties	All Opportunties	Sales Reports	Integration User		•
	Opportunities by Owner & S		Sales Reports	Integration User		•
	Opportunity Pipeline		Sales Reports	REC Sales Manager		•

The Edit Subscription dialog box appears.

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

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12:00 A	M	•					×	
After subs	cribing, you	ı'll receive	e refreshed	l report re	sults by e	mail.		

The report is now listed as being subscribed.

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Franchise F	Recruitm Home Char	ter Leads 🗸 Accounts 🗸 Contacts 🗸	Opportunities 🗸 Contracts	✓ Campaigns ✓	Reports 🗸	More 🔻 💉
Reports <b>Recent</b> 13 items						New Report
REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED	
Recent	Opportunity Pipeline	Opportunity Pipeline Report	Sales Reports	Integration User	<b>~</b>	•
Created by Me	Opportunties	All Opportunties	Sales Reports	Integration User		•
Private Reports	Converted Leads by Month		Marketing Reports	Integration User		•
Public Reports	Compliance - 14 Days from		Compliance Reports	Integration User		•
All Reports	Campaign ROI Analysis Rep		Marketing Reports	Integration User		•
FOLDERS	Lead Conversion		Marketing Reports	FCS Sys Admin		•
Created by Me	Upcoming Renewals - Next		Compliance Reports	Integration User		•
Shared with Me	Upcoming Renewals - Next		Compliance Reports	Integration User		•
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FAVORITES	Territories For Resale		Sales Reports	Integration User		•
AII Favorites	Reserved Territories	Reserved Territories	Sales Reports	Integration User		•
	Opportunities by Owner & S		Sales Reports	Integration User		•
	Opportunity Pipeline		Sales Reports	REC Sales Manager		•

## 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**.

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records)	)	Mr. Alexander Ivan	ov-	-			-	30%	1	20/03/	2018 R	EC Sales Ma	nager		Alexander Ivano
		Mr. John Smith-					-	30%	125	16/11/	2017 R	EC Sales Ma	nager		John Smith
		Mr. Andrew Jones-						30%	131	10/11/	2017 R	EC Sales Ma	nager		Andrew Jones
		Mubbashir Ali-						30%	131	10/11/	2017 R	EC Sales Ma	nager		Mubbashir Ali
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		Mr. Brian White-						30%	131	10/11/	2017 R	EC Sales Ma	nager		Brian White
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The Export dialog box appears.

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

	Export	
kport View		
Formatted Report	Details Only	
Export the report as it appears in Salesforce, including the report header, groupings, and filter details.	Export only the detail rows. Use this to do further calculations or for uploading to other systems.	
rmat		
Excel Format visy	•	

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**.

Formatted Report	Details Only	
Export the report as it appears in Salesforce, ncluding the report header, groupings, and filter details.	Export only the detail row Use this to do further calculations or for uploading to other system	s. Is.
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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 270.
- 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 268.
- 2. Print the PDF.

## How to add report results as campaign members

Sometimes you want to add many Lead records that already exist within Salesforce to a campaign. You do this by running a report and making all report results become members of the campaign.



You need to have Marketing User checked in your user information. Your system administrator will need to set this for you.

## To add report results as Campaign Members

1. Go to the Reports tab.

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	Franchise Recruitm	Home	Chatter	Leads 🗸	Accounts 🗸	Contacts	✓ Opportunitie	es 🗸 Contracts	✓ Campaigns ✓ Te	rritories 🗸 More 👻		. Mar
	Leads	M JIIIi C	<u>JEWS</u>	']](_ <i>_///</i>	2-5 III ( 17 -		ar nasan	1 ( <i>/////</i> -> \\\\}	New	Dashboards		
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										Calendar		

2. Choose a report.

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***	Franchise	Recruitm	Home	Chatter	Leads 🔨	<ul> <li>Accounts</li> </ul>	✓ Contact	ts 🗸	Opportunities 🗸	Contrac	ts 🗸 Campaign	s 🗸 Reports 🗸	More 🔻		Ń
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RE	PORTS	REPORT NAME		DESCR	IPTION				FOLDER		LAST MODIFIED BY	SUBSCI	RIBED		
Re	cent	New Leads							Private Re	ports	Marketing				
Cre	eated by Me														
Pri	vate Reports														
Pu	blic Reports														
All	Reports														

You can now see the report results.

3. From the Show more menu, choose Add to Campaign.

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Total Pecon	de									Save As
3										Save
LEAD OWNER	FIRST NAME	LAST NAME	TITLE	COMPANY / ACCOUNT	LEAD SOURCE	RATING	STREET	EMAIL		Subscribe
Sales	Bob	Smith	-		Phone	-	-	b.smith@handyworks.com.au		Export
Sales	Deborah	Harriss	-	-	Web	-	-	deb.harr@gmail.com.au		Delete
Sales	Phuong	Ngo	-	-	Email	-	-	phuong.ngo@g.com		Add to Compoint
Grand Total (3 records)								2-		Add to campaign

The Add to Campaign dialog box opens.

- 4. Choose from the Campaign list.
- 5. Select the appropriate Member Status.
- 6. Choose whether Existing campaign member records should change status.



When Campaign Members have just been sent an offer, Member Status should usually be set to *Sent*.

7. Click Submit.



You will receive an email when all the report results have been added as Campaign Members.

All the results you see in your report are added as Campaign Members.



For more information about campaign members, *See* "How to mark a lead as belonging to a campaign" on page 243. For more information about generating reports, refer to Salesforce documentation <u>Build a new report</u>.

( )

# Accessing Help and Support

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Raising Service Requests	278
Granting Account Login Access	286

# **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 sup- port	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.



### 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."

ß	All 👻 🔍 Search Accounts and more	** = ? + 🐻
Business Managem Home Chatter	Accounts V Jobs V Job Offers V Job Schedule In	voices ∨ Payments ∨ * Job Planning ∨ × More ▼ I
Person Account Mrs. Janet Baker Title Phone(2) • Email Account	t Owner ingwood Franchis 👔	+ Follow Edit Delete Create New Job
DETAILS RELATED		ACTIVITY CHATTER
Account Name Mrs. Janet Baker Title	Account Owner Ringwood Franchisee Franchise Franchise	Log a Call Email
Mobile 0404 080 300	Email	Create new Add
Home Phone Birthdate	Phone Create New Job	Filters: All time • All activities • All types 🕎 Refresh Expand All
Address Information Billing Address	You can't perform this action on this page.	tps
✓ Invoice Summary Information		Cancel Sove activity. Past meetings and tasks marked as done show up
Tax Exempt 🕚	Has Overdue Balance 🔹	Load More Past Activities 🔻
Total Invoice Amount  O AUD 9,962.70	Overdue Balance	
Amount Paid  AUD 150.00	Debtors 0-15 days	Activity Lists Add List
Amount Outstanding  AUD 9,612.70	Debtors 16-30 days	NAME NUMBER OF TASKS COMPLETED TASKS
Credit Balance  AUD 51.00	Debtors 31-45 days	
Balance Payable (1) AUD 9,561.70	Debtors 46+ days	
Accounts Receivable Notes 0		

### 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.

Account FCS Ringwood East			+ Follow Edit
Type Phone Website 0404 030 808	Account Owner Account Sit	te Industry	
DETAILS RELATED	Account Coo	de Mapping Setup	on Status Disconnect
Account Name FCS Ringwood East	A Component Error has occurre	d!	
Master Franchise ① VIC Master	Message	Message	
Status O Active	Uncaught afterRender threw an error in 'ligh undefined]		
Status Reason	Component Descriptor	<i>h</i>	
Field Manager	markup://lightning:dualListbox	markup://lightning:dualListbox	
Timezone 0	File Name	Function	Filters: All time • All activities • All types
Australia Melbourne	lightning/dualListbox.js	H.validateSelection	s
✓ Business Information	Line Column		
Legal Entity Name	2 17398		steps. To get things moving, and a task of set up a meeting.
Trading Name   FCS Ringwood East	Stack Trace 🗸		ities
Operating Structure Company	H.validateSuleciion()#https://fesopsgoidemut-dev- ed.ightning.force.com/components/ightning/daallitatbox.jsi2i17398 H.get validity()#https://fesopsgoidemut-dev- ed.ightning.force.com/components/ightning/duallitatbox.jsi2i9567		tivity. Past meetings and tasks marked as done show up here.
✓ Address Information			
Billing Address 1/9 Freeman Street Ringwood East VIC 3135 41/STPA 114		A	vity Lists Add List
✓ Invoice Summary Information		Cancel Save	NUMBER OF TASKS COMPLETED TASKS
Tax Exempt	Has Overdue Balance		

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**.

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CLOSED AUD 80,000 OPEN (>70%) AUD 80,000 GOAL A		OSERNAMES
1504		ghomesaus my salesforce.com DISPLAY DENSITY
120x		Nothing needs your Comfy
80.		OPTIONS Switch to Salesforce Classic  Add Lisename
0		
Jan Feb Goal	Mar Closed + Open (>70%)	
Today's Events	Today's Tasks 🛛 👼 💌	
Looks like you're free and clear the rest of the day.	Nothing due today. Be a go-getter, and check back soon.	
View Calendar	View All	

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

FRANCHISE	All 👻 🔍 Search Salesfor	Ce	😥 🖬 ? 🌣 🖡 🦱
Business Manage	Home Chatter Accounts v Jobs v Job Offers v Job Schedule Invoices v	Payments v Customer Feedback v Contacts v Material Price Lists v Files v Reports v	Dashboards 🗸 More 🔻 🥒
Q. Quick Find	Grant Account Login Access		
Advanced User Details Approver Settings Authentication Settings for External Systems Change My Password Connections	Grant Account Login Access To asset with support issues, you may grant your administrator or support personnel the ability to login as yo Compt Send Ty Usermanne tions persiste Biotechards dame	u and access your data.	Hep for his Page 📀
Grant Account Login Access	Grant Access To	Access Duration 2	
Language & Time Zone Login History Personal Information Security Central	Bateriore can Deport Doudige, inc.: Baport [1] Franchis Carlo Sakora Report [1] Nince Report [1]	Na pocesi	
> Display & Layout	Save	1 Month (exp. 29/06/2019)	
> Email			
> Chatter	1		
> Calendar & Reminders			
> Desktop Add-Ons			
> Import			

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

FRANCHISE CLOUD SOLUTIONS		All 👻 🔍 Search Salesforce			😒 🖬 ? 🌣 🌲 🥌
Business Manage	Home Chatter Accounts $\checkmark$ Jobs $\checkmark$ Job Offers $\checkmark$	Job Schedule Invoices 🗸 Paym	ents $\lor$ Customer Feedback $\lor$ Contacts $\lor$	Material Price Lists $\lor$ Files $\lor$ Repo	rts ∨ Dashboards ∨ More ▼ ,
2, Quick Find My Personal Information	র্ত্ত Grant Account Login Access				
Advanced User Details Approver Settings Authentication Settings for External Systems Change My Password	Grant Account Login Access To assist with support issues, you may grant your administrator or support Changes Saved	t personnel the ability to login as you and acce	iss your data.		Hurp for bits Plage 🔮
Connections	My Usemame: loryn.jenkins@nfctrial01.demo				
Grant Account Login Access	Grant Access To Salasfore com Support		Access Duration		
Language & Time Zone	DocuSion Inc. Support		No Access	0	
Login History	Franchise Cloud Solutions Support		1 Week (exp. 5/06/2019	)	
Personal Information	Nintex Support	_	No Access	8	
Security Central					
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You can revoke access at any time.