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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CHAPTER 2

Getting Started

Where to start

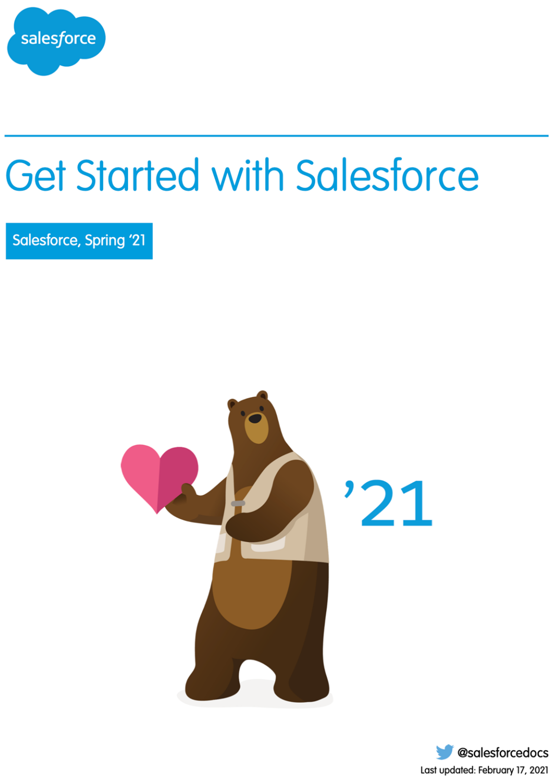
Franchise Recruitment is an application especially designed for the franchise industry running within the award-winning and market-leading Salesforce Platform.

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, Get Started with Salesforce.



> For more Salesforce user guides, See Salesforce Downloadable User Guides.

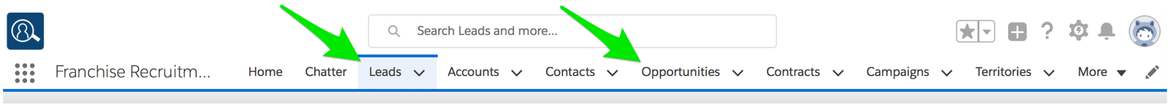
How Salesforce organizes information

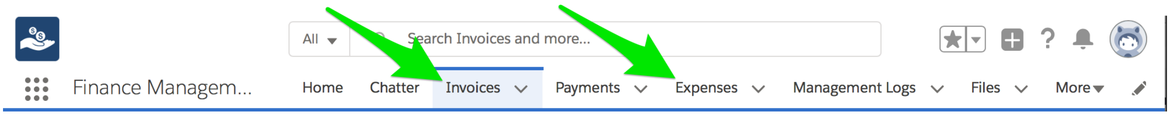
Salesforce organizes data into different types of records. Each type of record is stored together.

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.

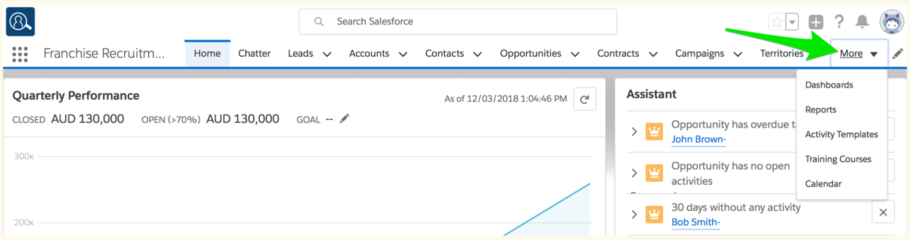
The Salesforce menu provides you access to each different type of record.





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.



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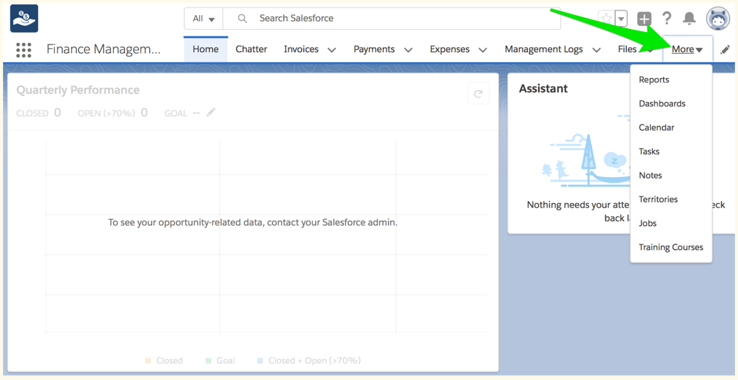
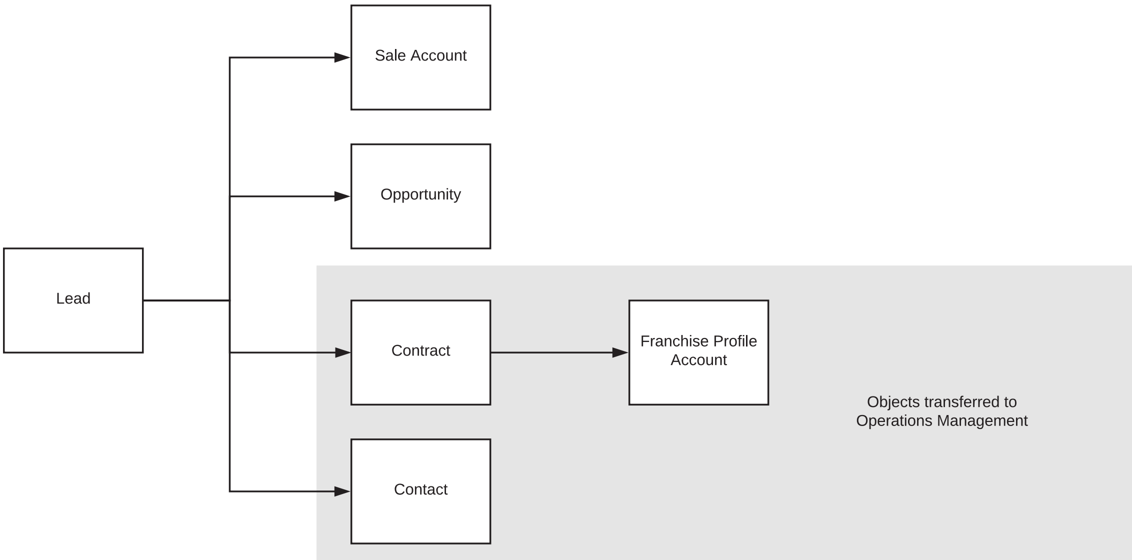


Overview

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 converted 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 multiple 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 requirements 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.

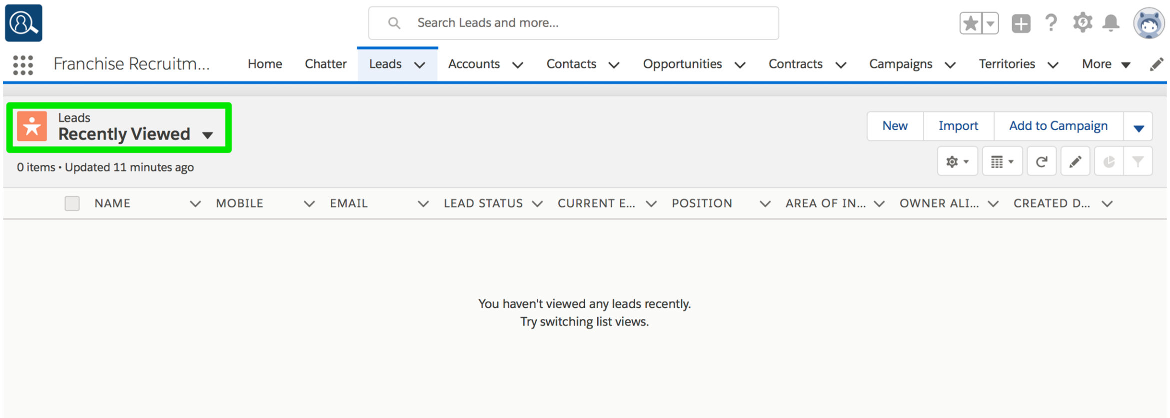
Record	Description
Franchise Profile Account	Generated from the Contract, the Franchise Profile Account becomes the key record representing the franchise. This record can be transferred to the Operations Management product if your organization has licensed it.

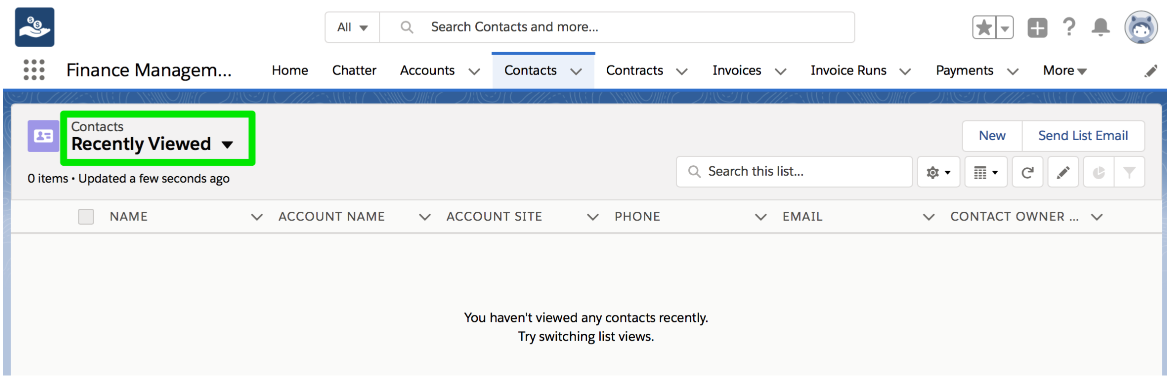
How to browse information using List Views

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.

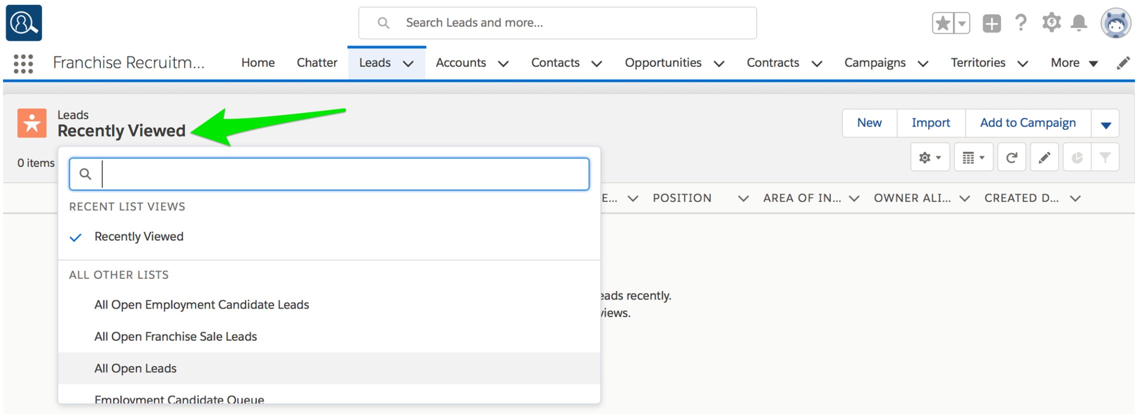


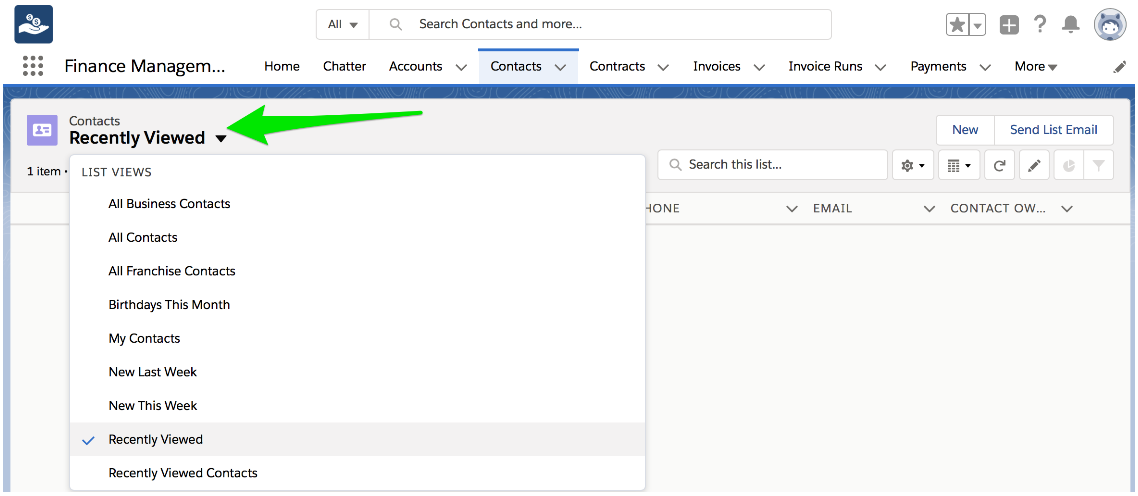


If this is your first use and you have not yet viewed anything, you will see an empty list.

To see some data

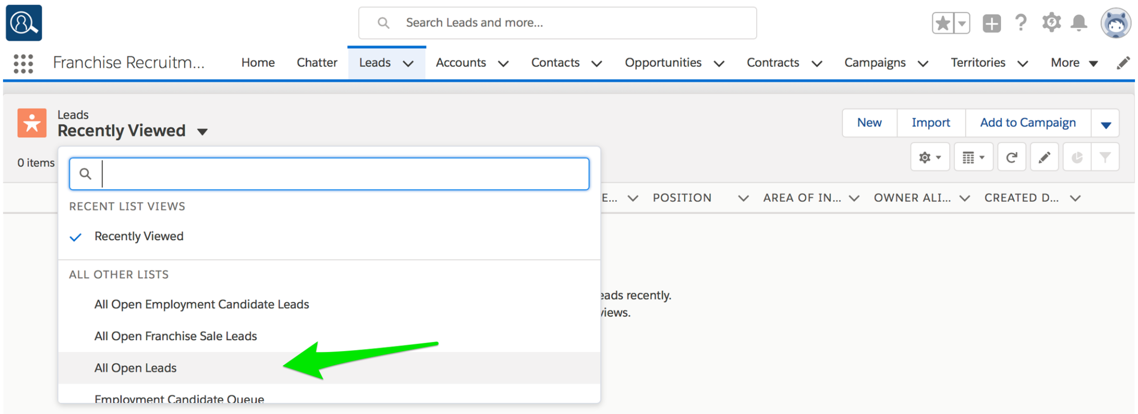
1. Click on **Recently Viewed**.

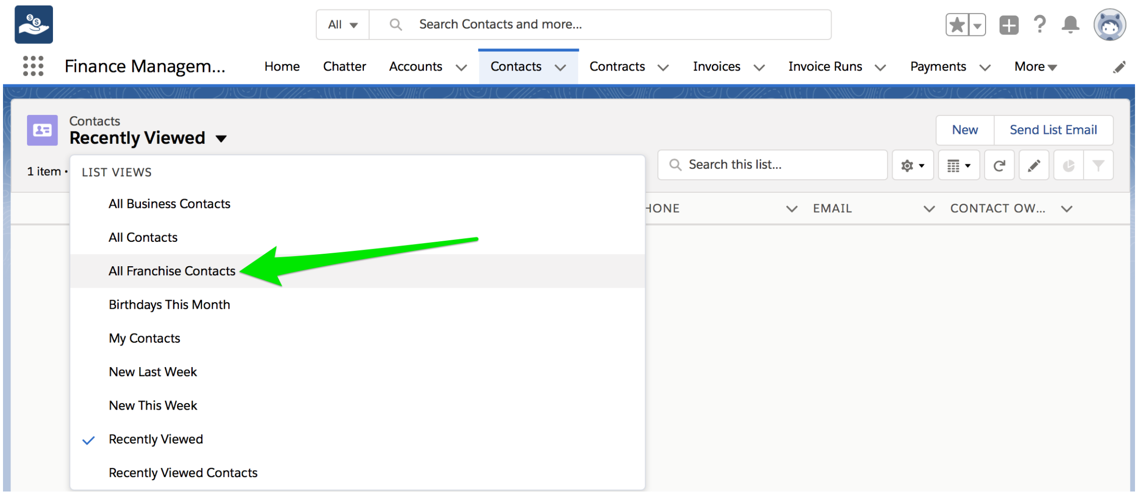




"Recently Viewed" is the name of a list that shows items you have viewed recently. Now that you have clicked on it, you can see the names of other lists.

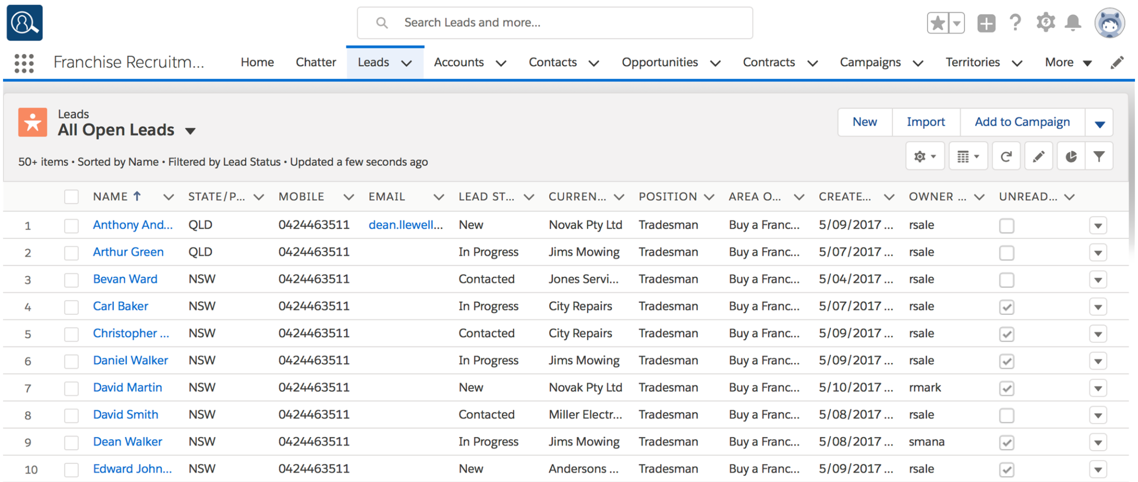
2. Click on any list containing the word “All.”

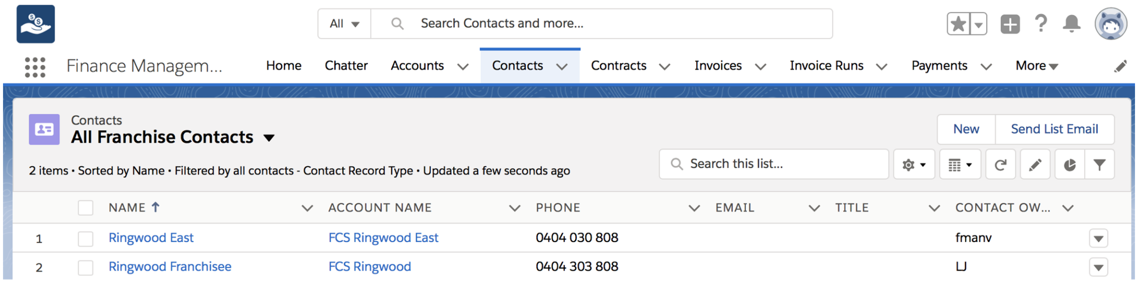




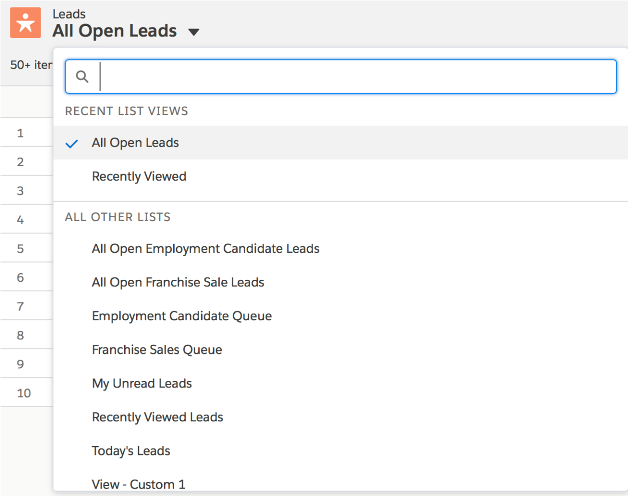
If there is data in your system, this list is likely to show it.

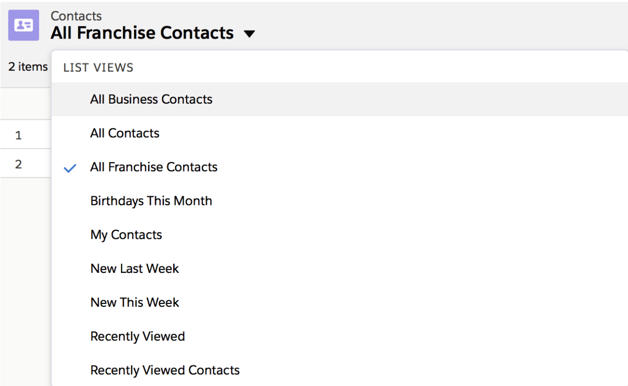
3. You can now see the data displayed by this list view.





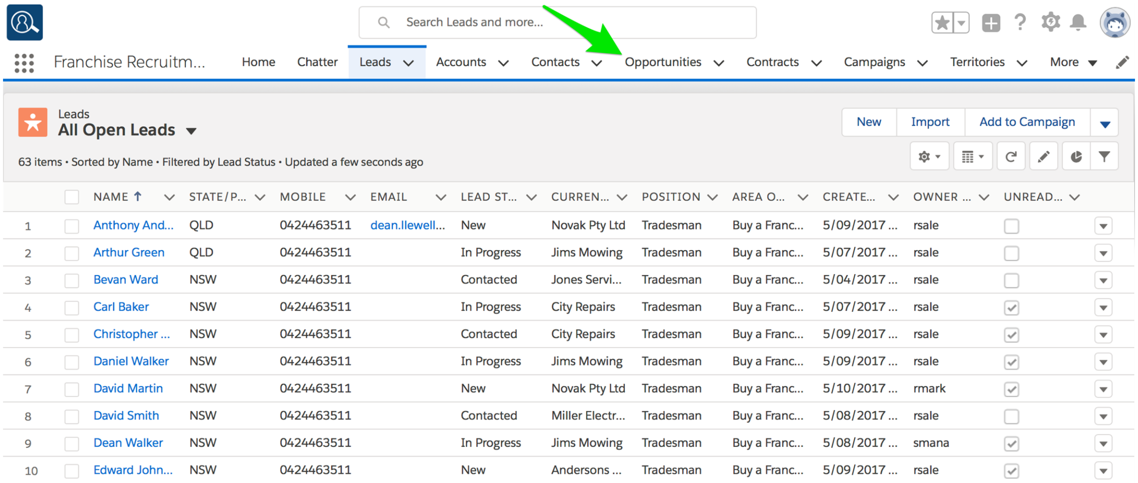
4. Now re-open the list view and notice the different types of views.

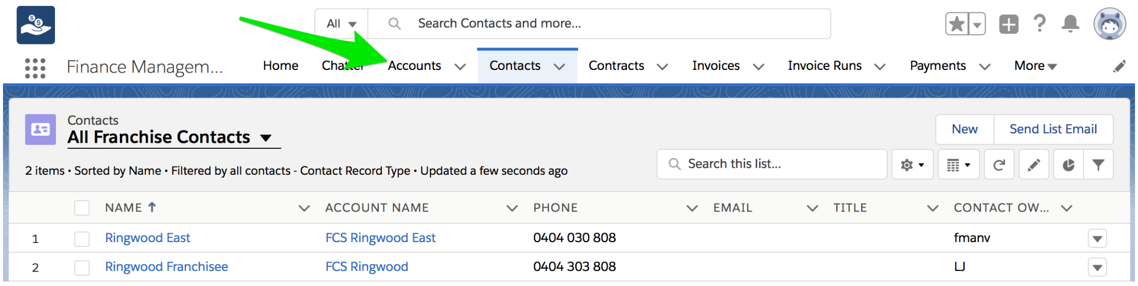




Each list potentially contains a different subset of records. Salesforce uses list views to make the amount of data you can see manageable.

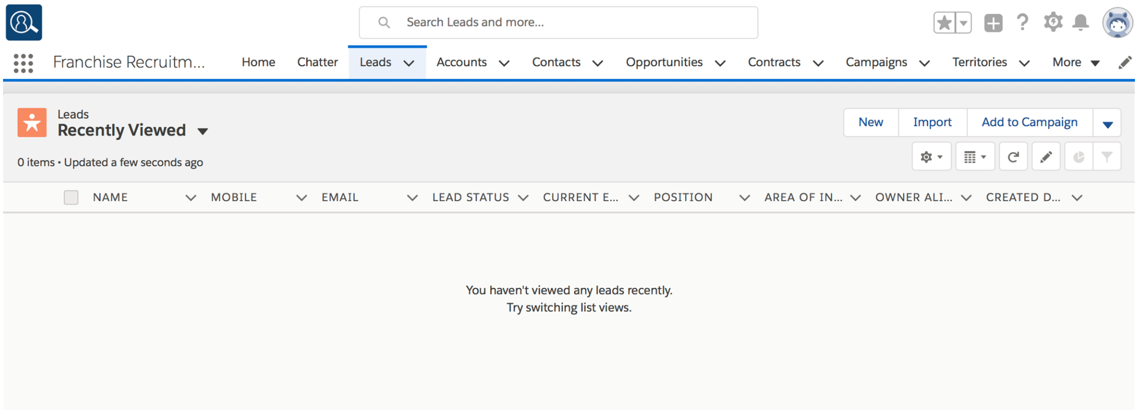
5. Now click away to a different tab.

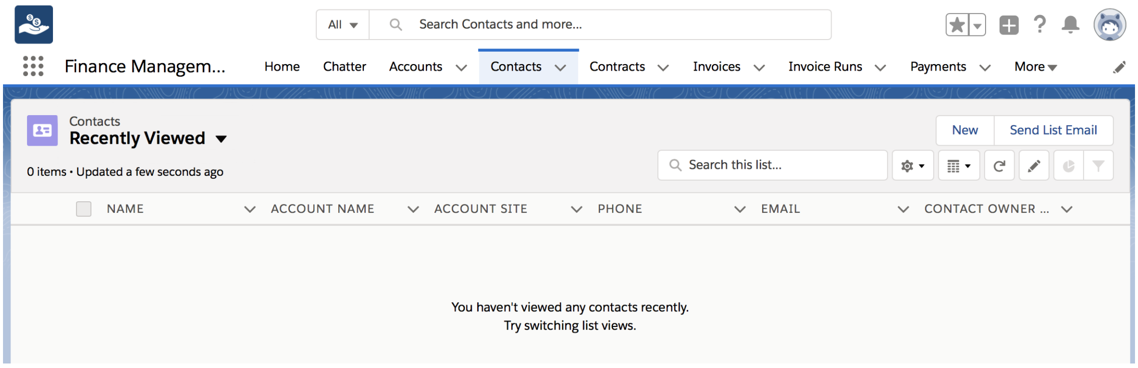




You will see the list of recently viewed **Opportunities**, which will be empty if you have not yet viewed any.

6. Now come back to the original tab.





If you see an empty list, it is because Salesforce is showing you the **Recently Viewed** list.

> While this behavior might be surprising when you are just getting started, in practice it is very useful. Most of the time, we want to work on records we have recently viewed. Of course, if you had clicked on one of the records, this list wouldn't be empty. It would show the item you had clicked on.

> Take some time to go through each of the list views in the system. Get to know the sort of available list views. Understanding what is available will help you find the right information at the right time.

Key list views

In addition to the standard Salesforce list views, 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
Leads	Franchise Sales Queue	Where to find newly created leads for potential purchasers of franchises. When the lead is assigned to a sales representative it is removed from this queue. *See* “Capture and confirm leads” on page 51.
	Employment Candidate Queue	Where to find newly created leads for potential employees. You will need to determine your internal process for working with potential employees within this queue.
	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.
Contracts	All Activated Contracts	Contracts that are activated.
	All Draft Contracts	Contracts that are draft.
	Expiring Contracts	Contracts that are expiring in the next seven months.
	My Activated Contracts	Contracts owned by you that are activated.
	My Draft Contracts	Contracts owned by you that are draft.

Record type	List Name	Description
Accounts	Franchise Profile Accounts	Accounts for operating franchise businesses. This is a list of accounts that is visible in Franchise Operations. *See* "How to create a franchise profile account" on page 135.
	Master Franchise Profile Accounts	Accounts for master franchisor businesses. Generally created during implementation or by an administrator.
	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. *See* "When a franchise opportunity turns out to be an employment candidate" on page 142.

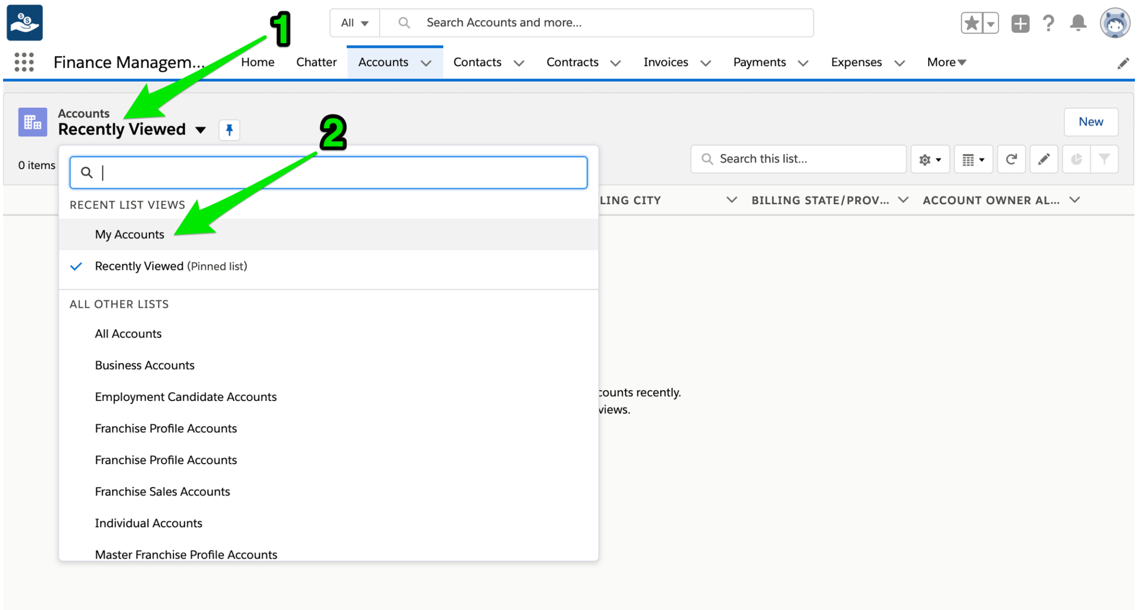
How to set a default list view

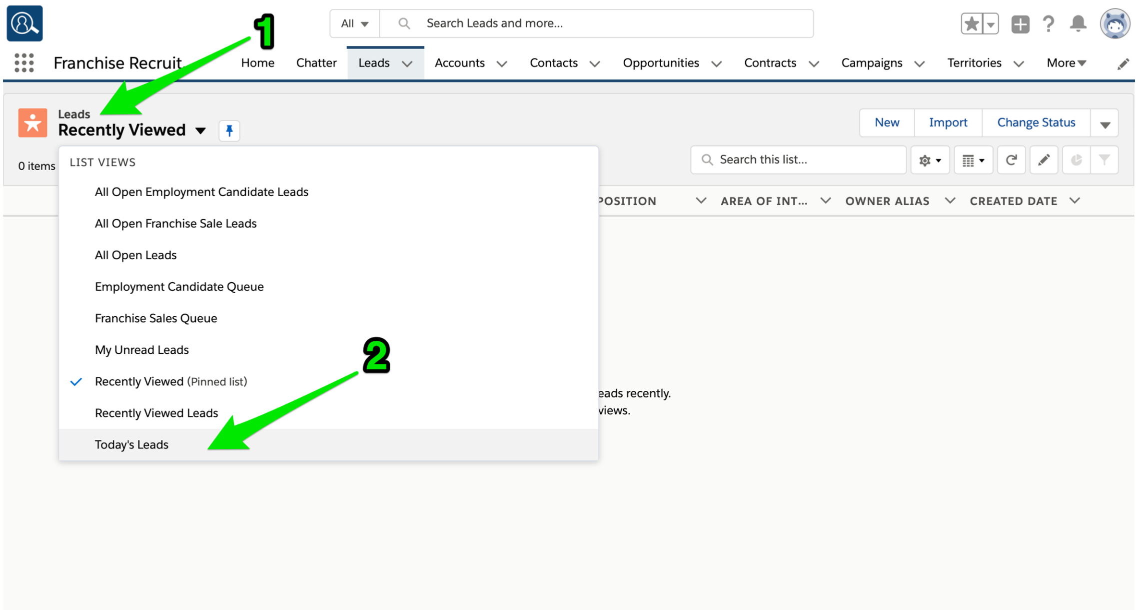
For many tabs, it is quite useful seeing the Recently Viewed list view when you first open the tab. Often times we work with particular items multiple times, and Recently Viewed helps you do this. But for some tabs, you may find it more useful to see another list view as the default. When this is the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

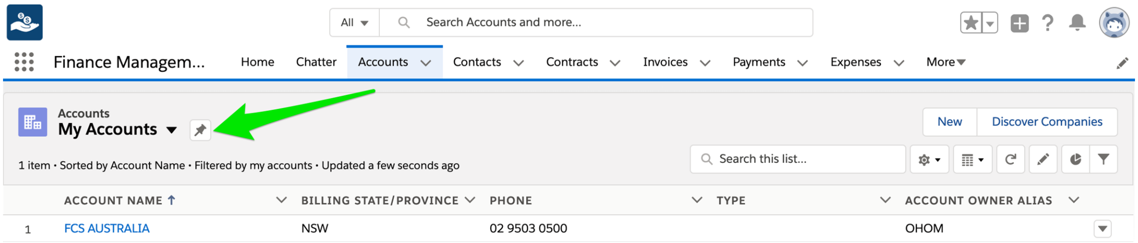
To set a default list view

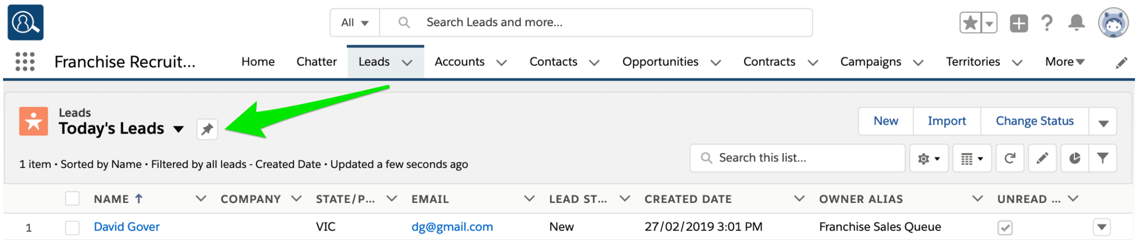
1. Open the List View control and select the List View you want as the initial view.



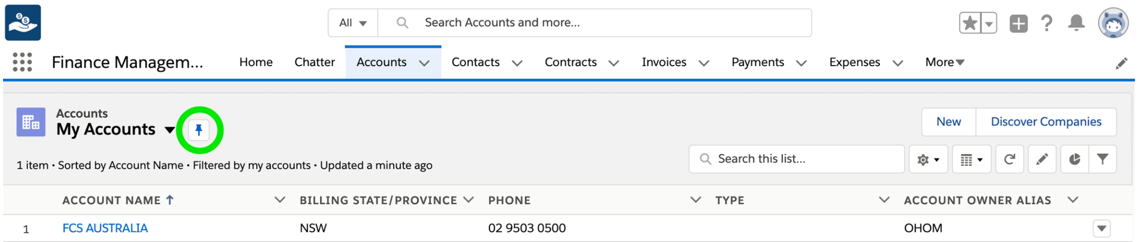


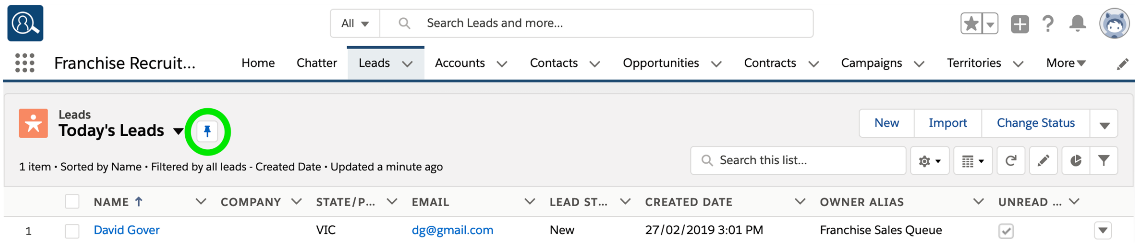
2. Press the pin.





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





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

How to customize a list view

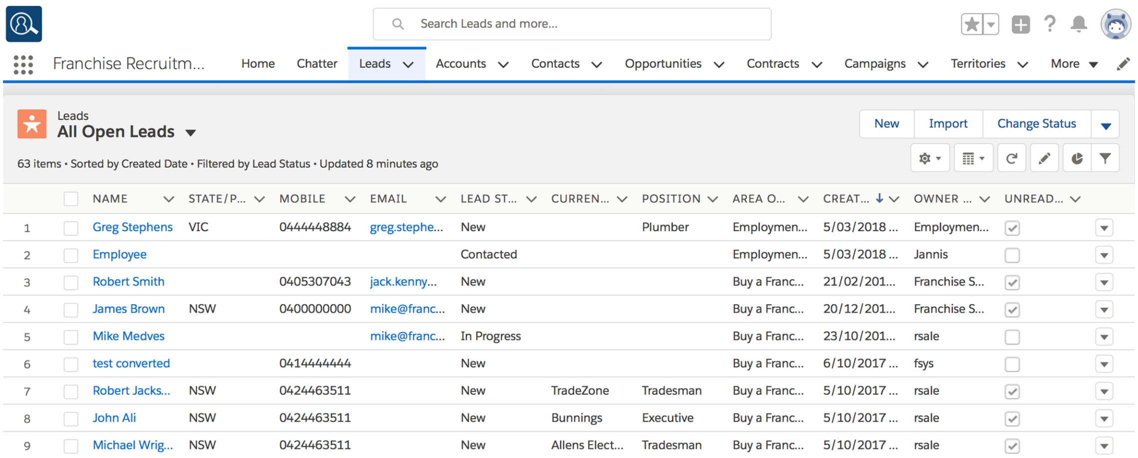
Once you have become familiar with the list views that are already available, you might want to configure your own list view to meet your particular need.

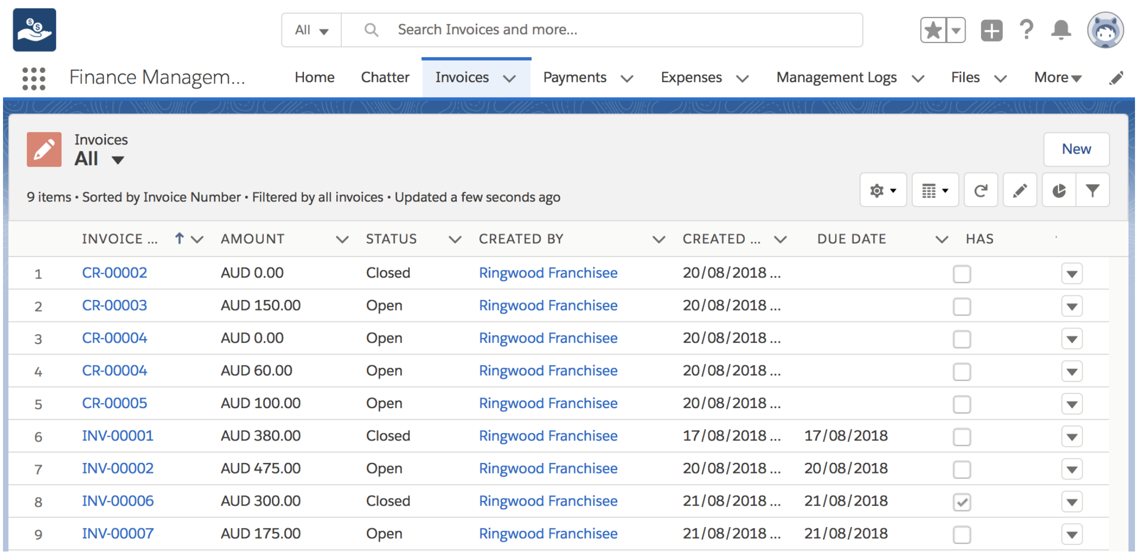
> Imagine you are a new sales representative working out of Melbourne. The list view named **All Open Leads** shows a lot of leads from New South Wales, and you only want to see ones from Victoria. You could create a list view to show **Victorian Open Leads**.

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

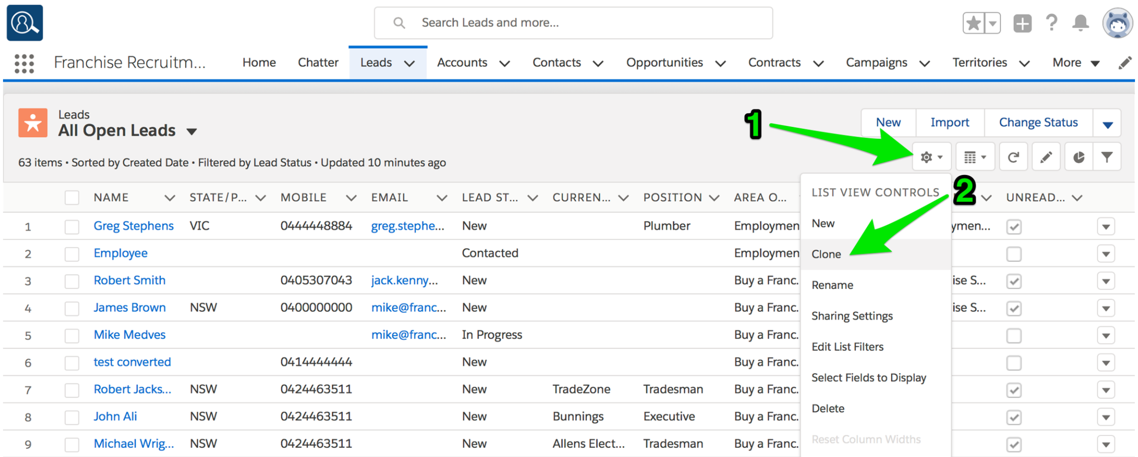
To modify an existing list view

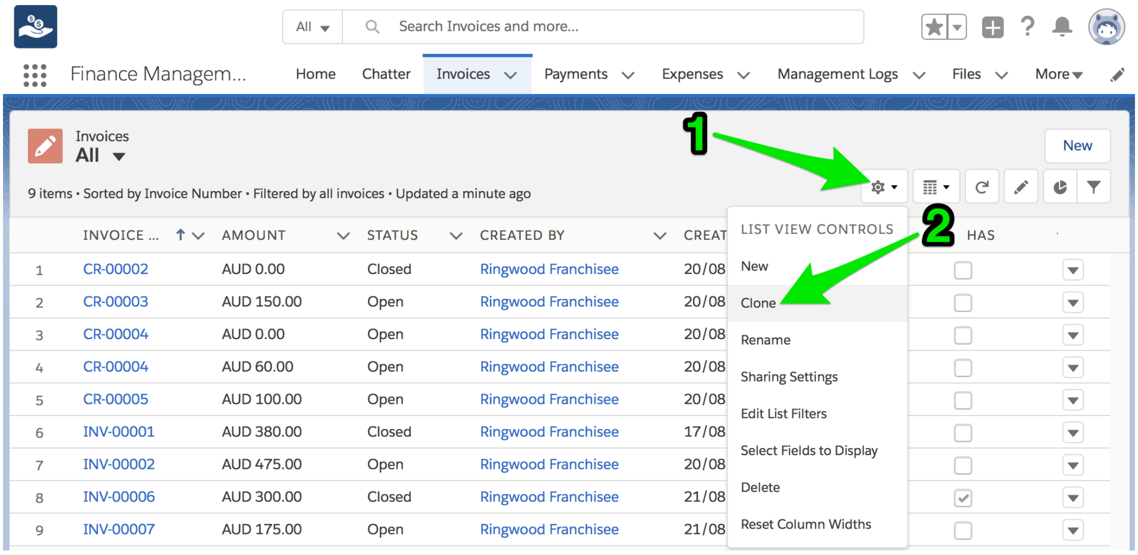
1. Select the list view you want to copy.





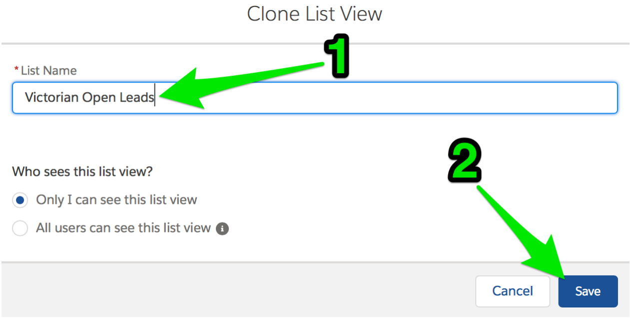
2. Open the **List View Control** and choose **Clone**.

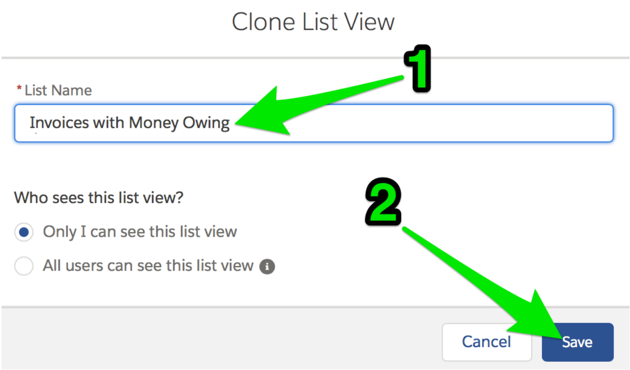




The **Clone List View** dialog box appears.

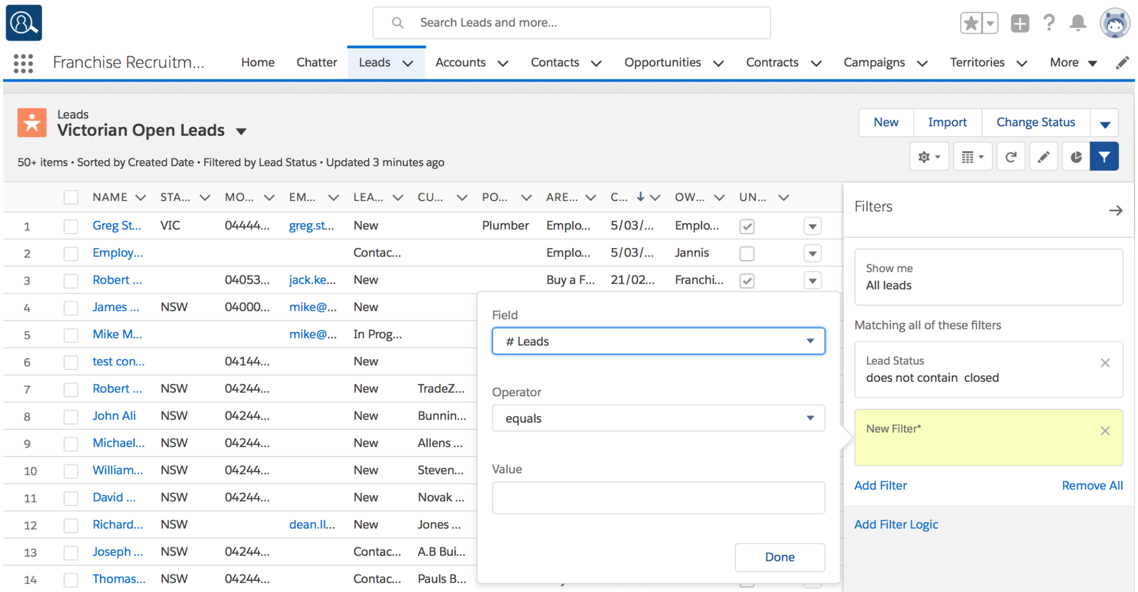
3. Enter the new `List Name` and press **Save**.

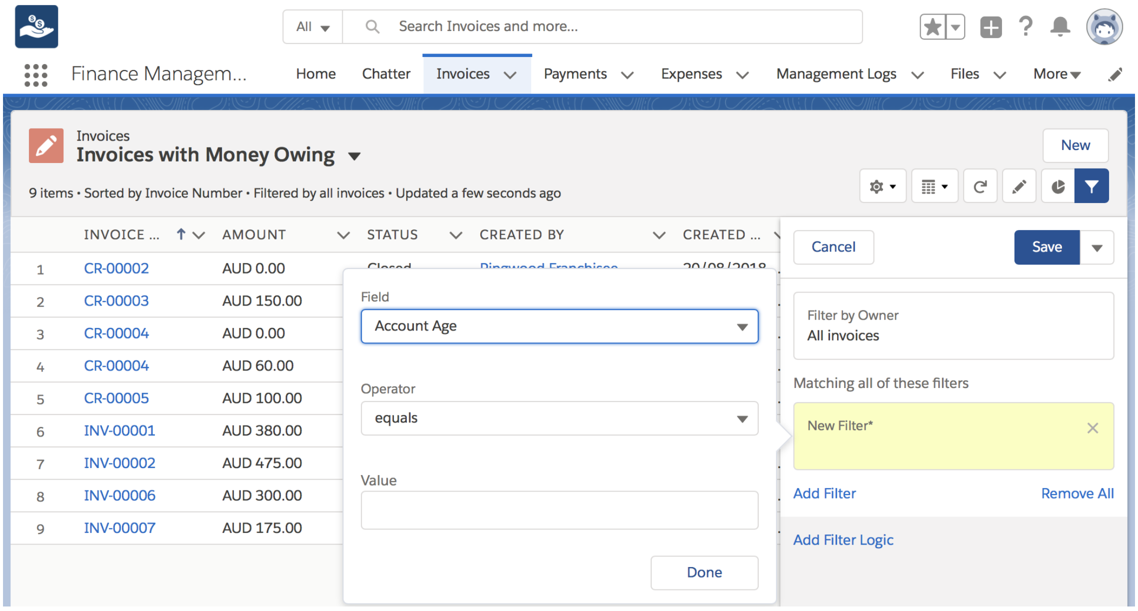




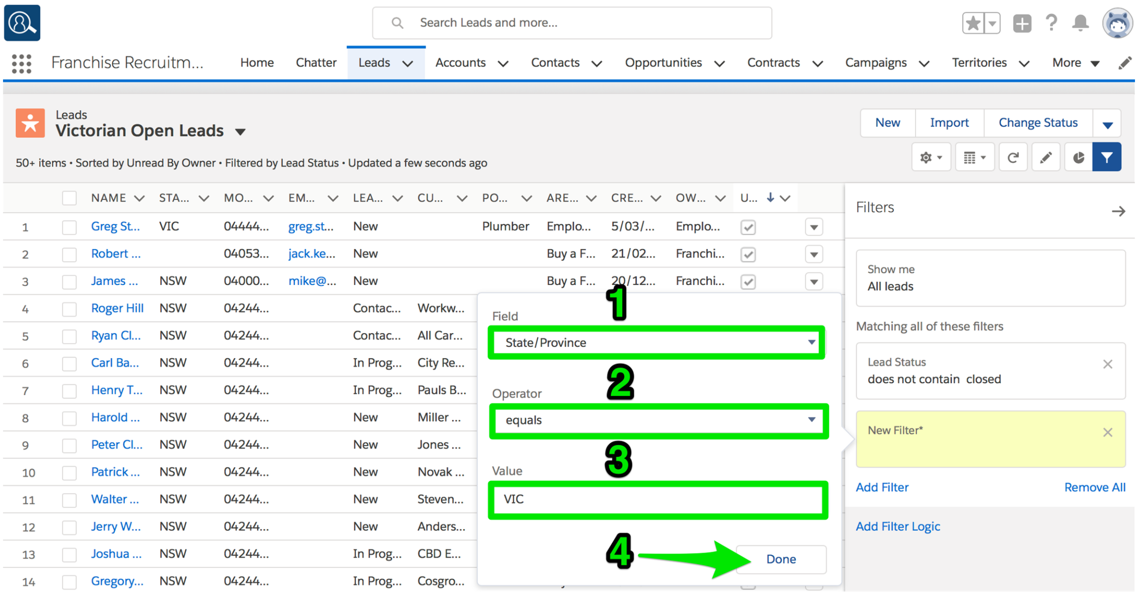
The newly named list view appears together with its filter pane.

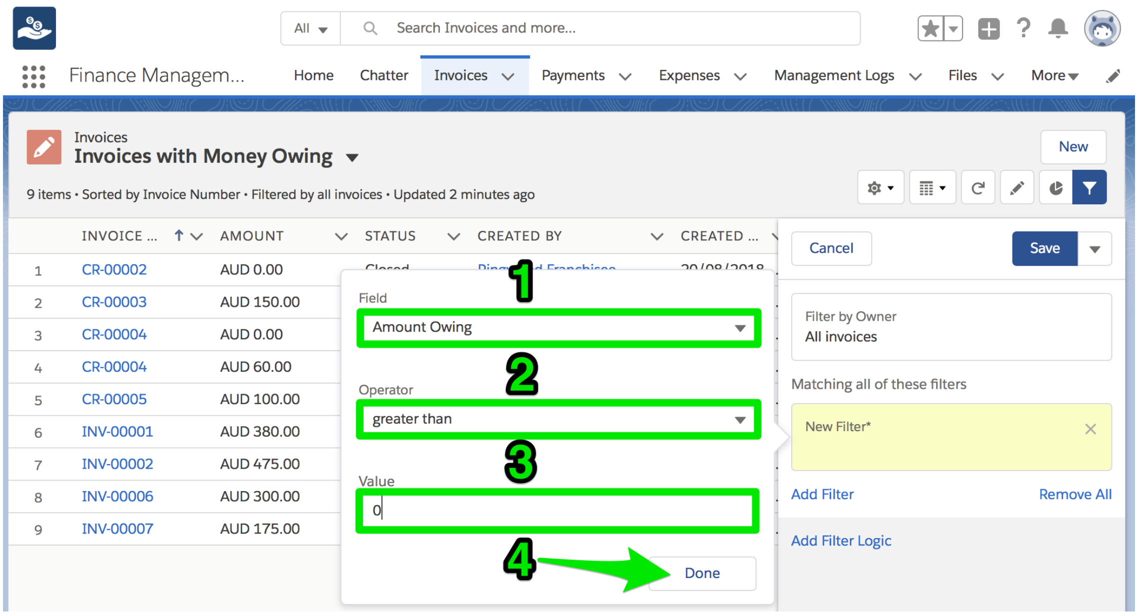
4. Choose the **Add Filter** link to add an extra filter condition.



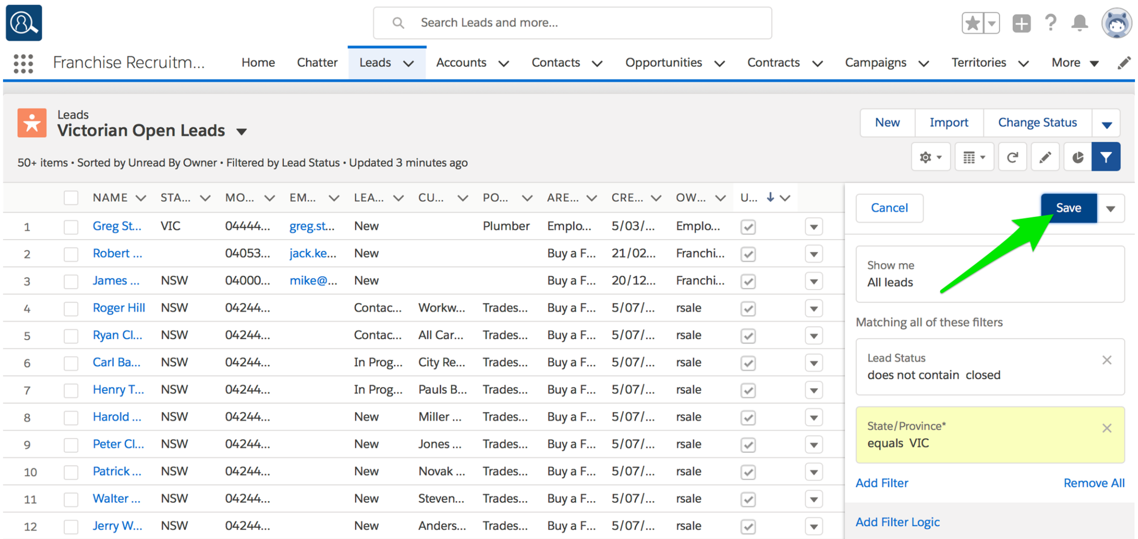


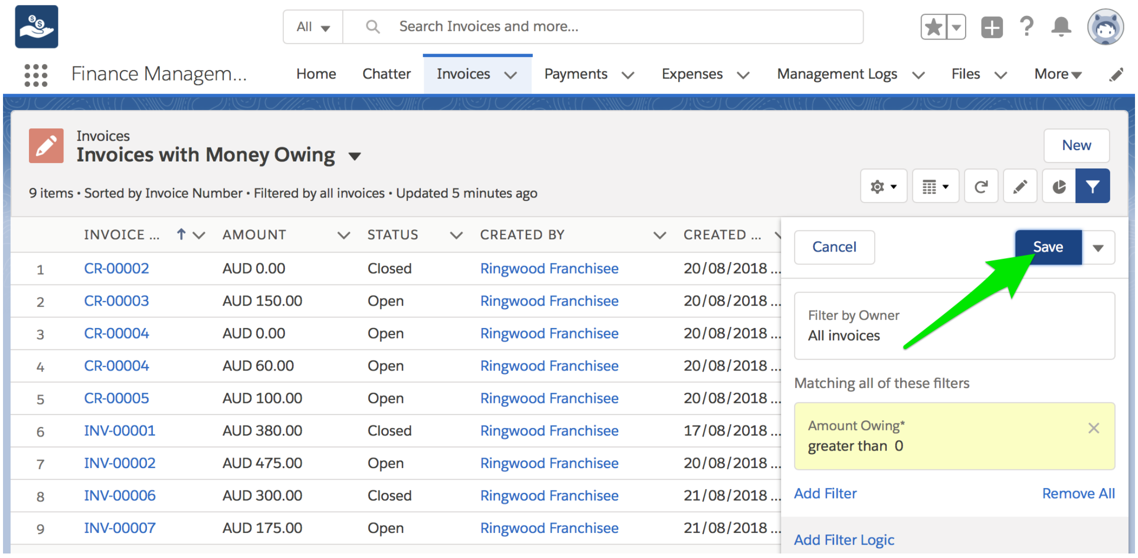
5. Use the `Field`, `Operator` and `Value` fields to set the new condition, then press **Done**.



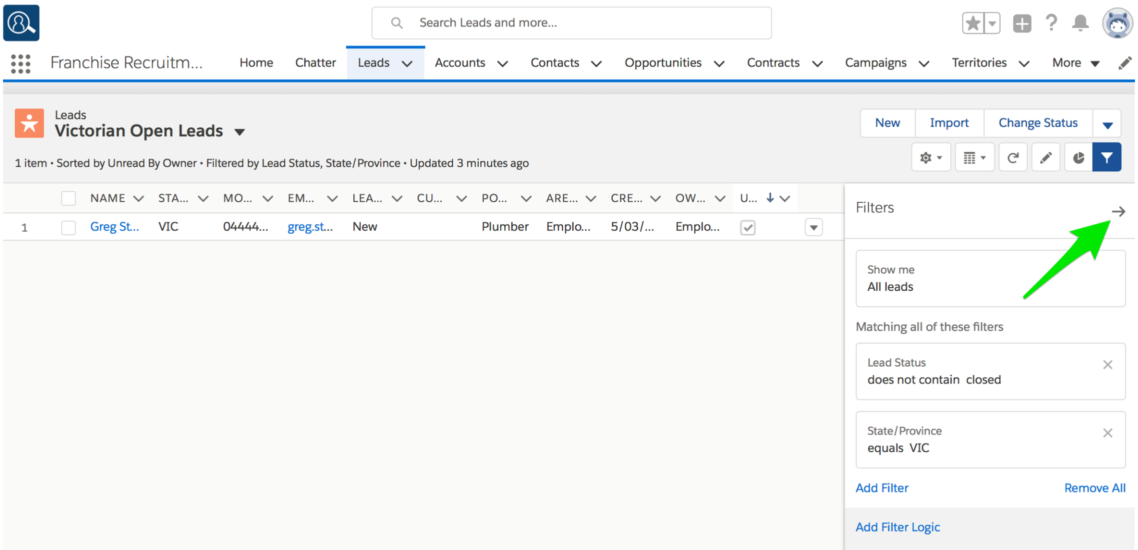


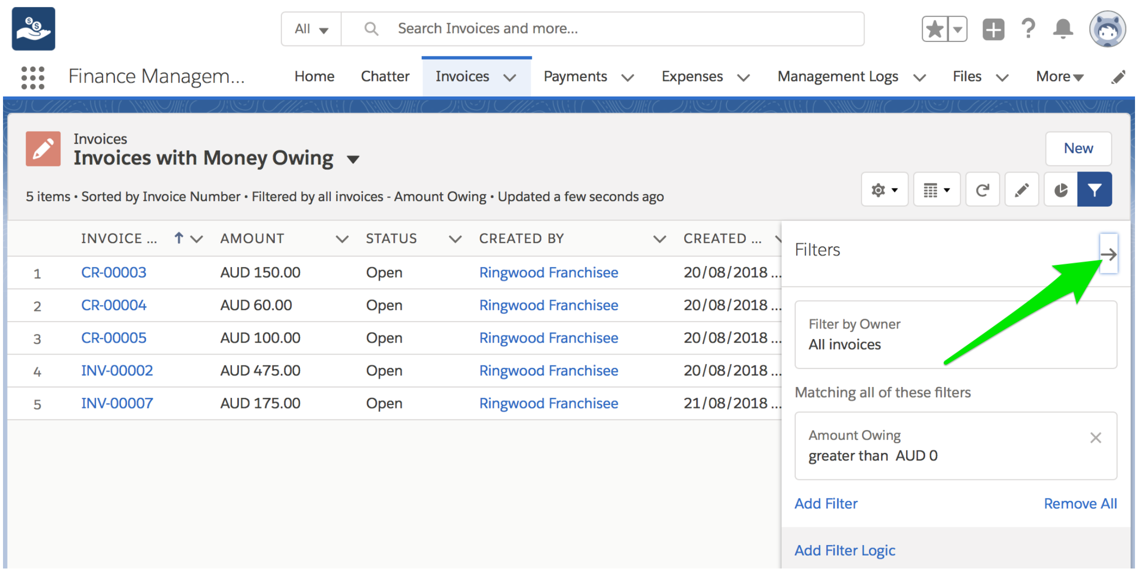
6. Now press **Save**.



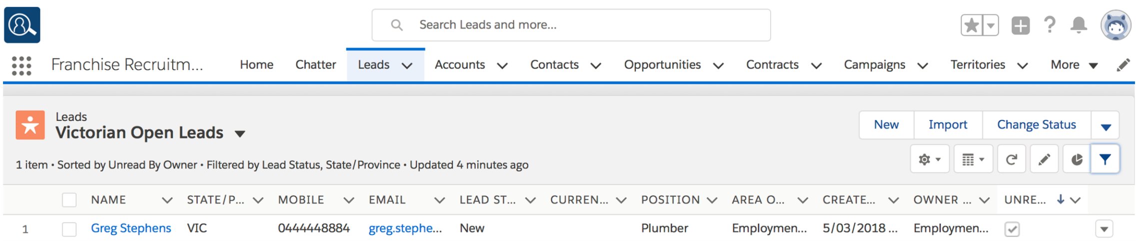


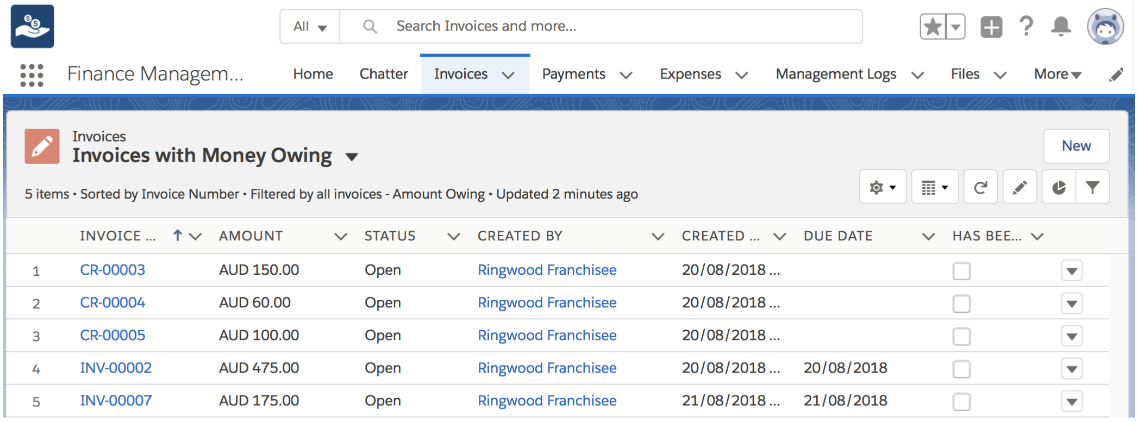
7. Press the arrow to remove the **Filters** pane.





Now you can see your newly modified list view.





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

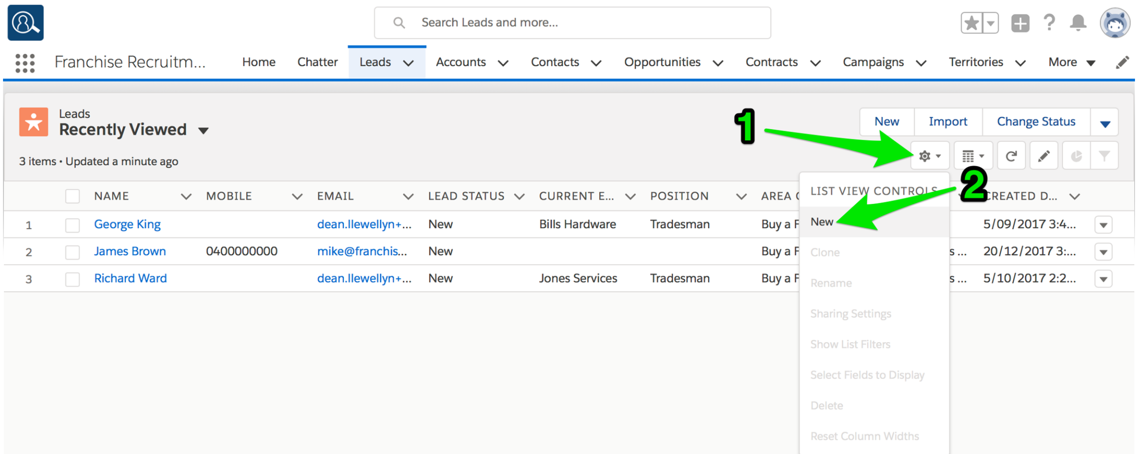
How to create your own list view

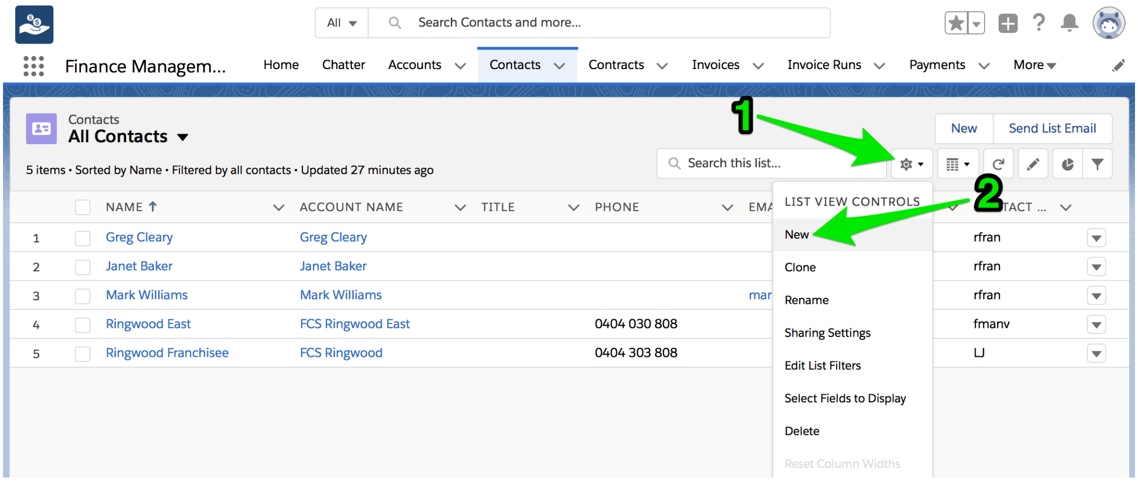
Creating your own list view can be a useful way to quickly access data.

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

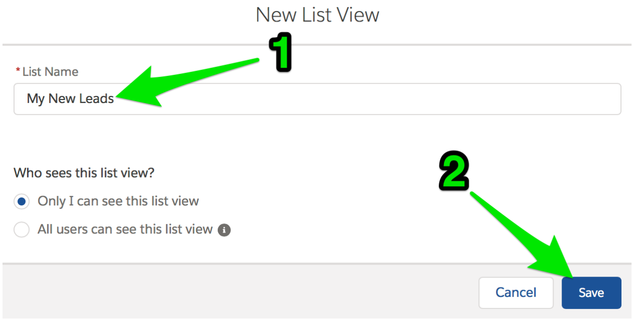
To create a new list view

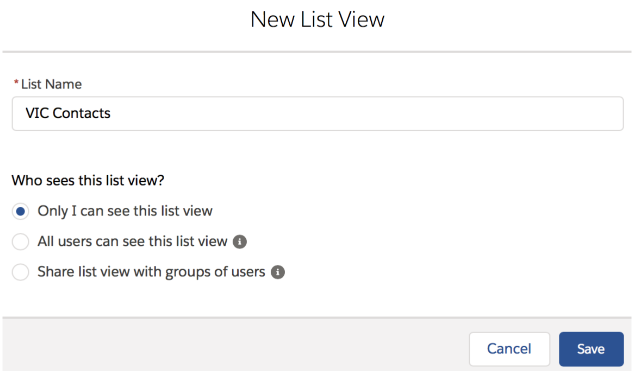
1. Open the **List View Control** and choose **New**.





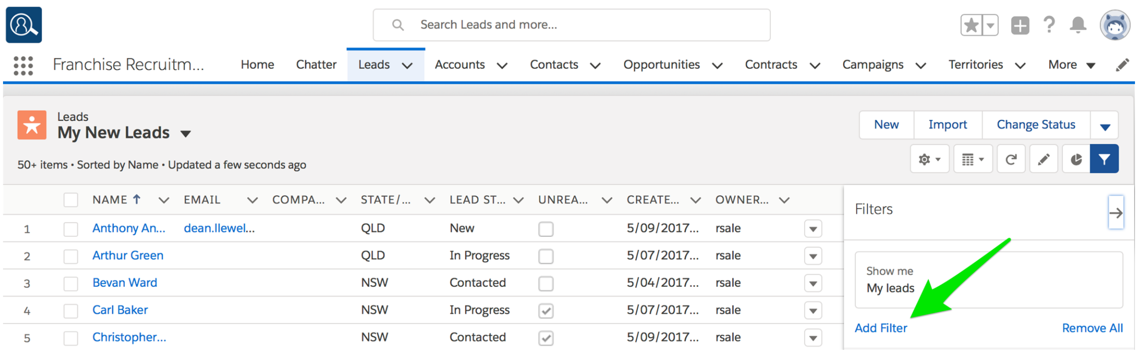
2. Enter the new `List Name` and press **Save**.

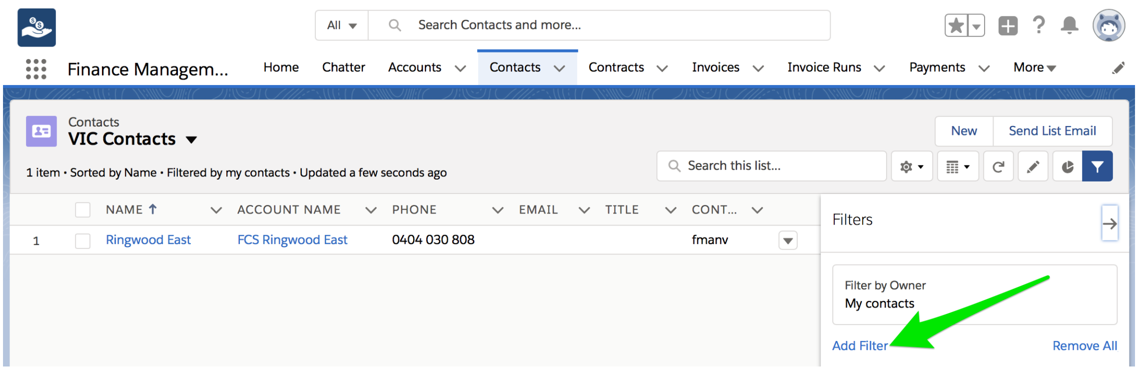




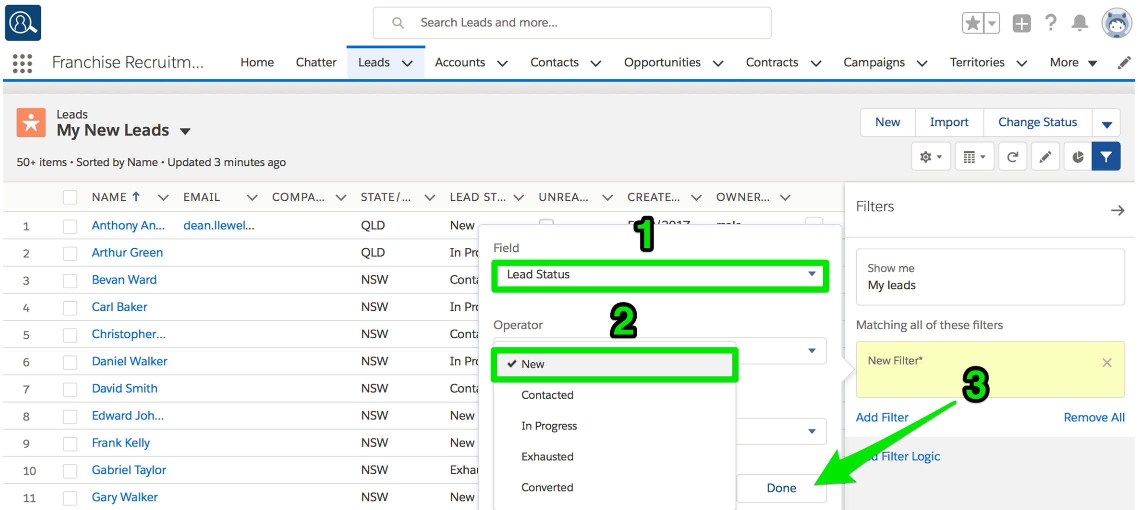
The newly named list view appears together with its filter pane.

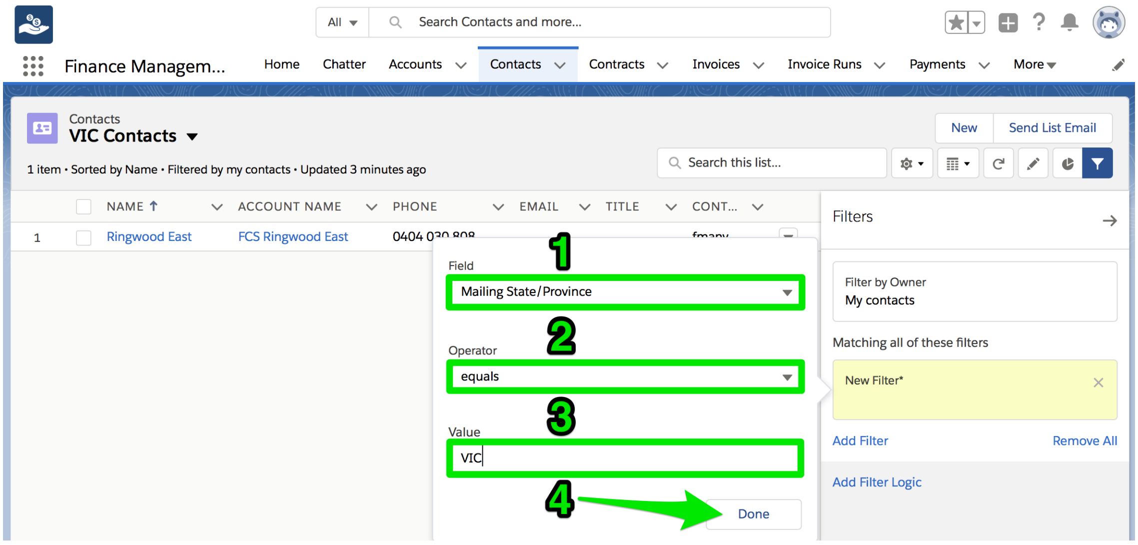
3. Choose the **Add Filter** link to add an extra filter condition.





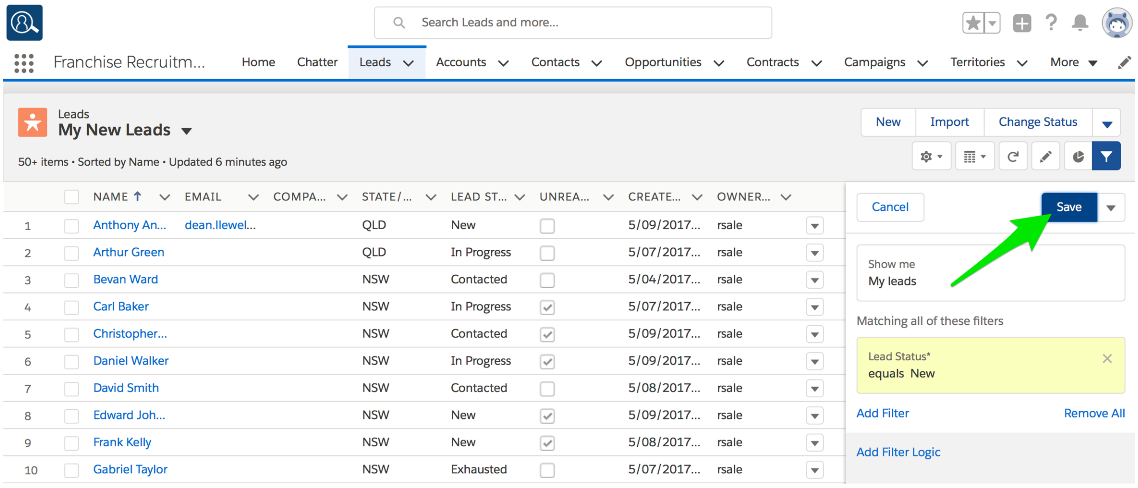
4. Use the `Field`, `Operator` and `Value` fields to set the new condition, then press **Done**.





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

5. Press **Save**.



Search Leads and more...
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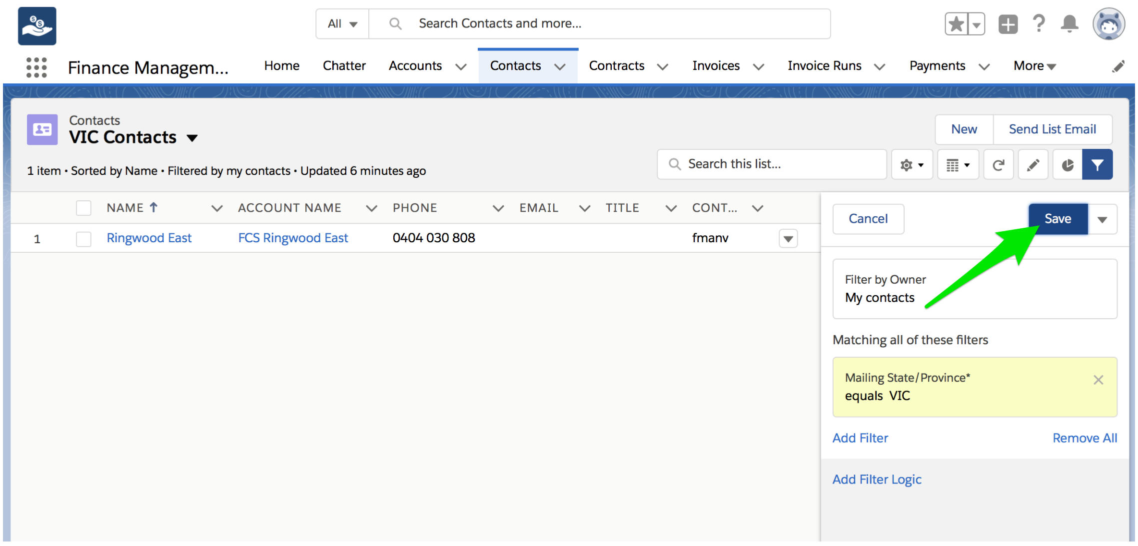
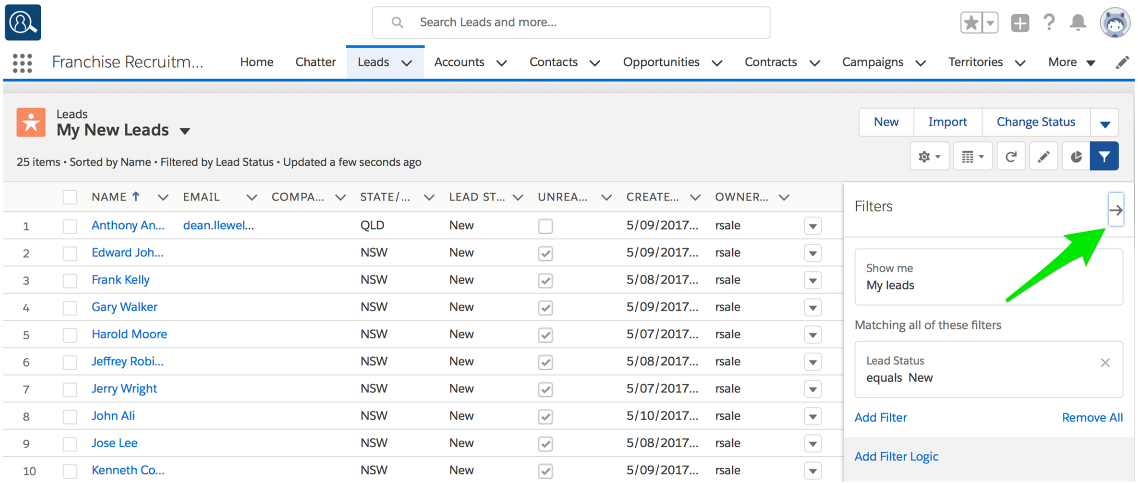
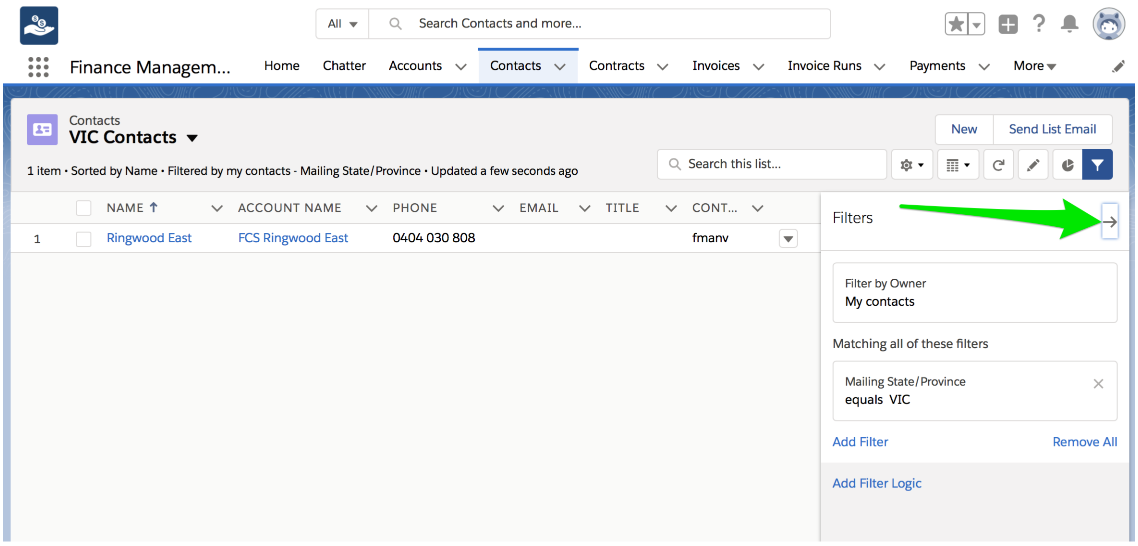
Accounts
Contacts
Opportunities
Contracts
Campaigns
Territories
More
Leads
My New Leads
50+ items • Sorted by Name • Updated 6 minutes ago
New
Import
Change Status
NAME
EMAIL
COMPA...
STATE/...
LEAD ST...
UNREA...
CREATE...
OWNER...
Anthony An...
dean.llewel...
Arthur Green
Bevan Ward
Carl Baker
Christopher...
Daniel Walker
David Smith
Edward Joh...
Frank Kelly
Gabriel Taylor
Cancel
Save
Show me
My leads
Matching all of these filters
Lead Status*
equals New
Add Filter
Remove All
Add Filter Logic



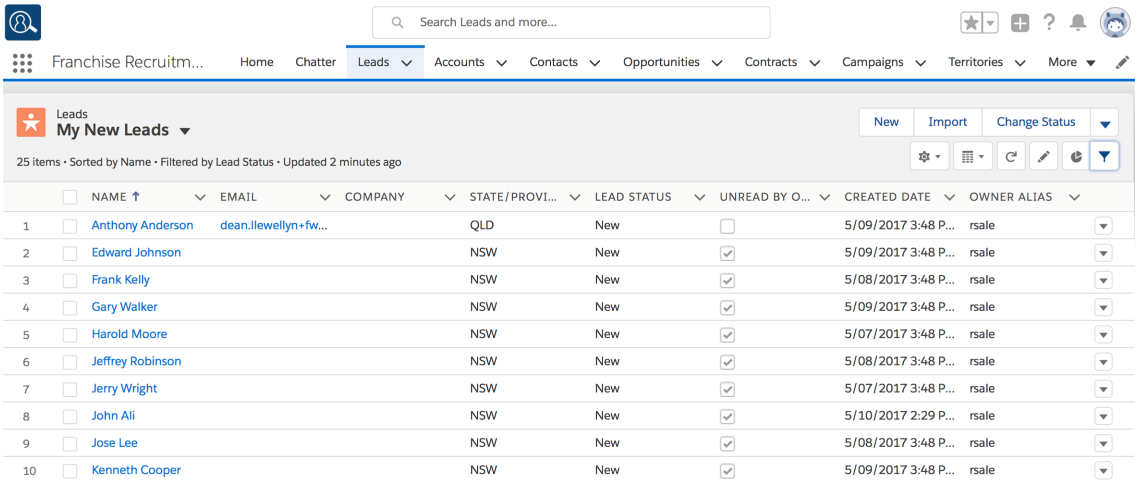
All
Search Contacts and more...
Finance Managem...
Home
Chatter
Accounts
Contacts
Contracts
Invoices
Invoice Runs
Payments
More
Contacts
VIC Contacts
1 item • Sorted by Name • Filtered by my contacts • Updated 6 minutes ago
New
Send List Email
Search this list...
NAME
ACCOUNT NAME
PHONE
EMAIL
TITLE
CONT...
Ringwood East
FCS Ringwood East
0404 030 808
fmanv
Cancel
Save
Filter by Owner
My contacts
Matching all of these filters
Mailing State/Province*
equals VIC
Add Filter
Remove All
Add Filter Logic

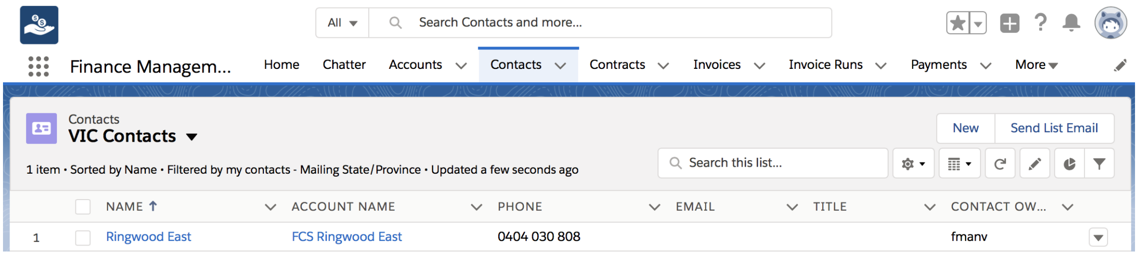
6. Press the arrow to remove the **Filters** pane.





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



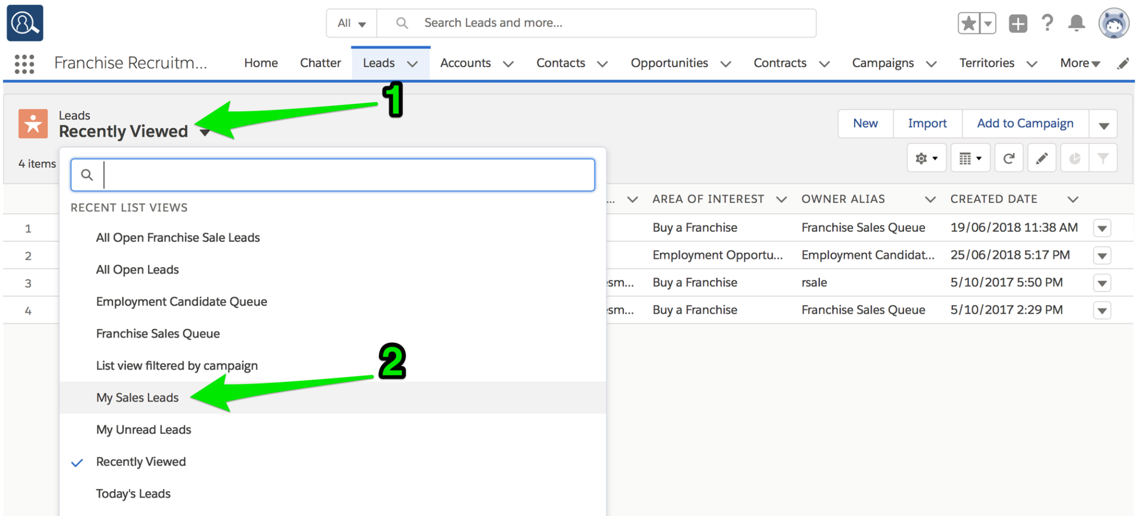


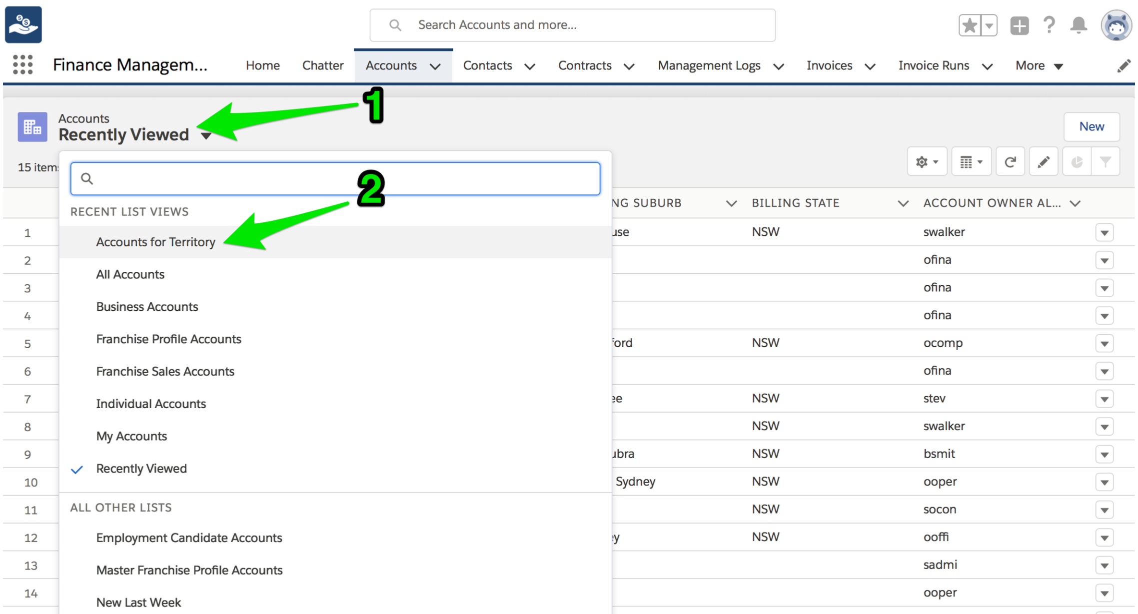
How to add columns to a list view

You can add columns to any custom list view.

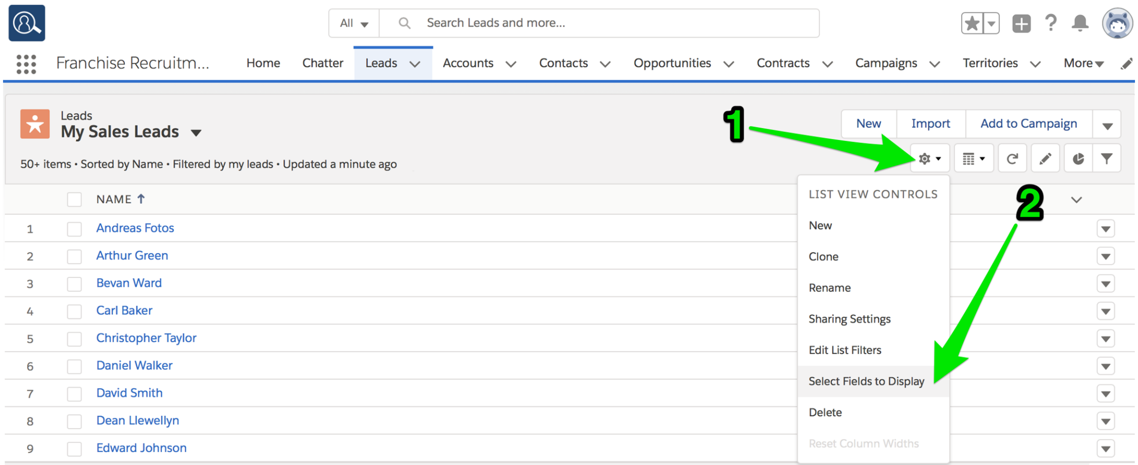
To add columns to a custom list view

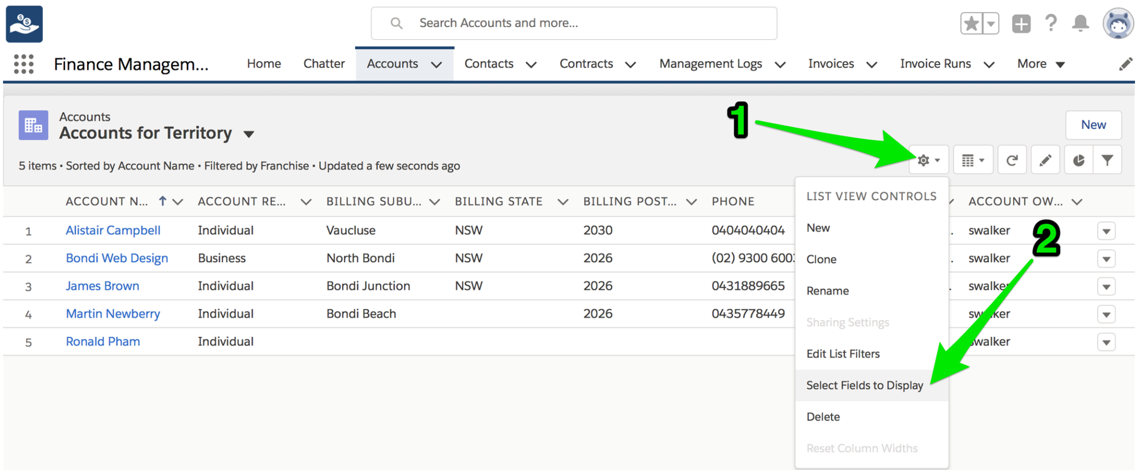
1. From **Recently Viewed**, select a custom list.





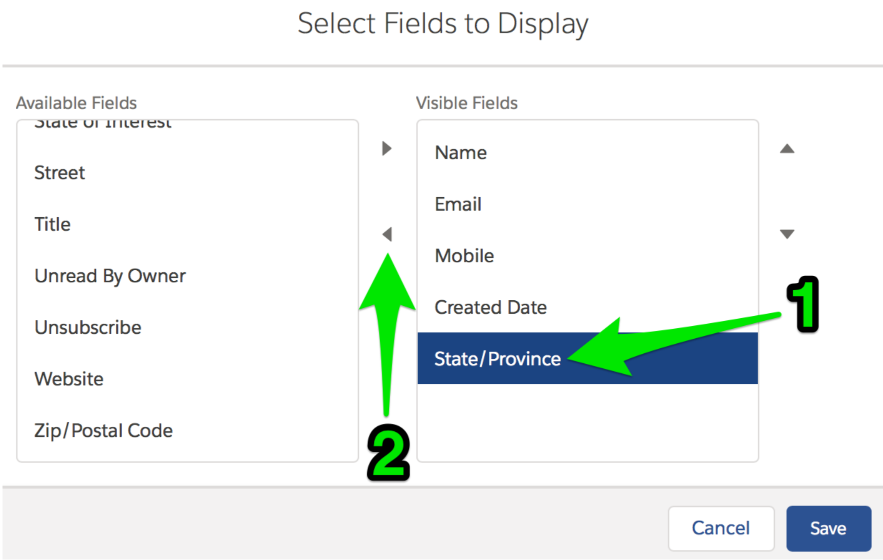
2. Open the **List View Control** and choose **Select Fields to Display**.



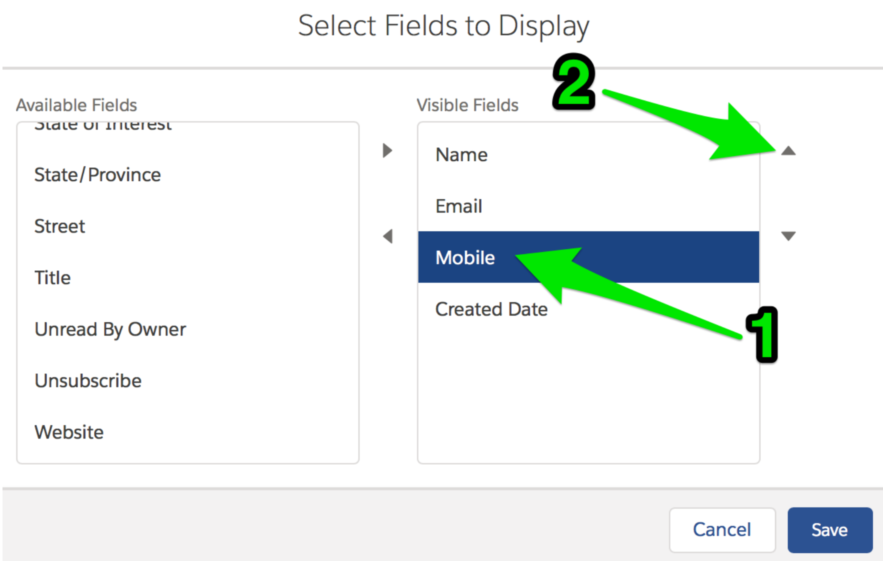


3. From `Available Fields`, select the fields you want to make visible.

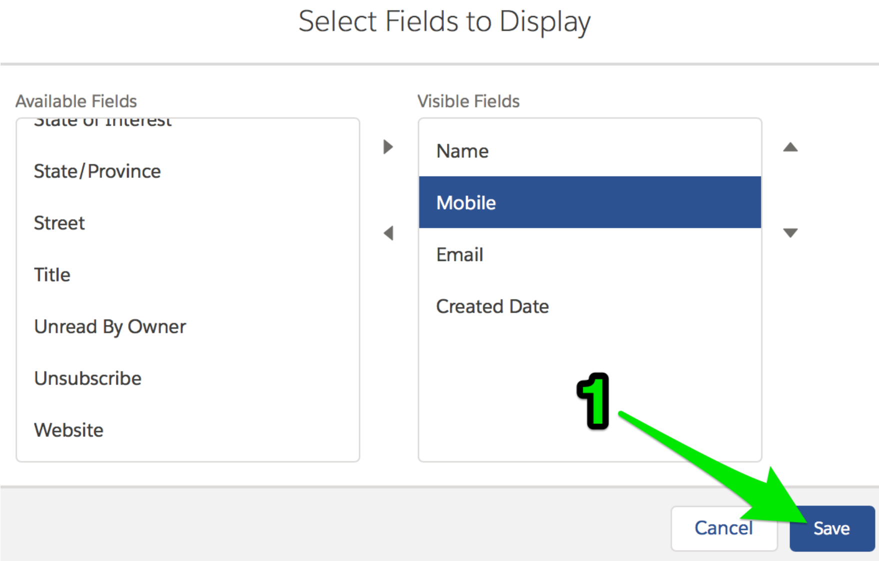
4. Now remove any fields you want not to display.



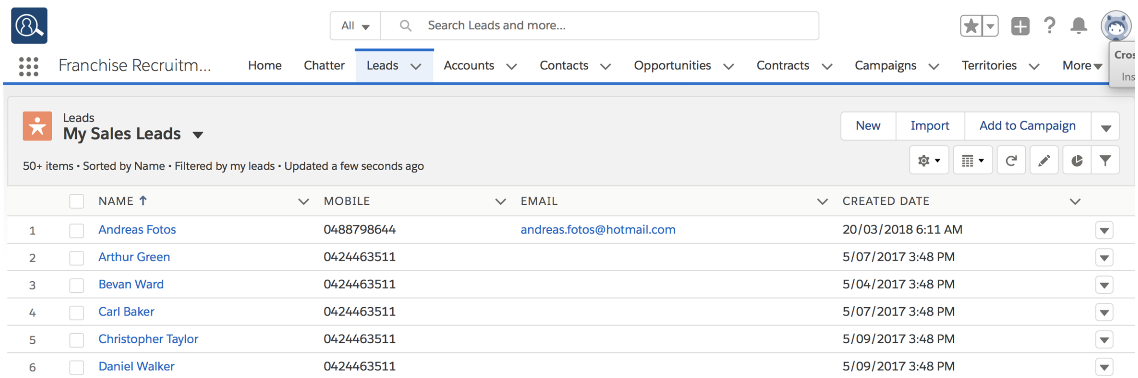
5. Sort the fields into the order you want to see.

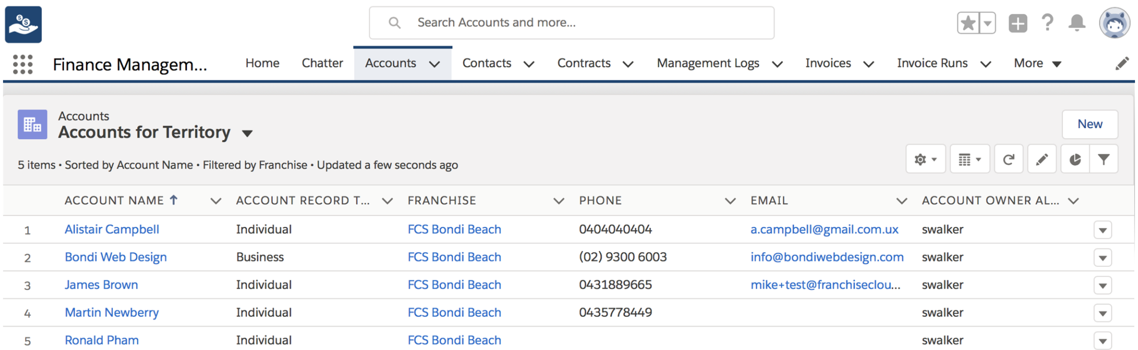


6. When you have selected all the fields you want to see, press **Save**.



Now you can see the updated list.



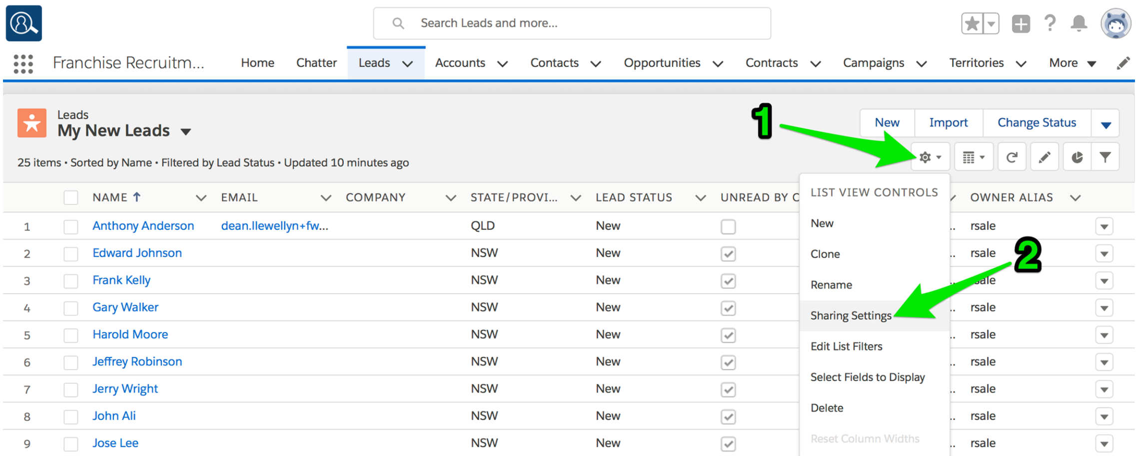


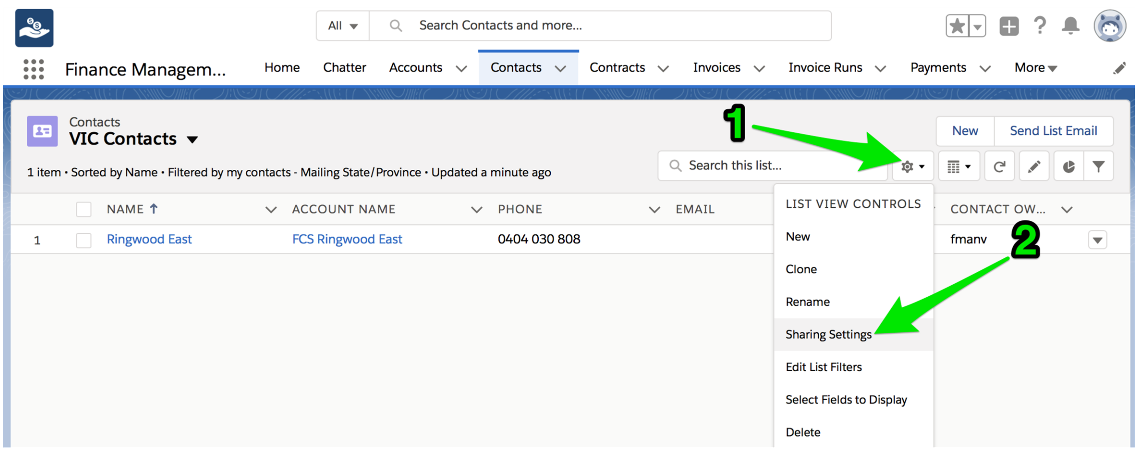
How to share list views

You can share your list views with your colleagues.

To share a list view

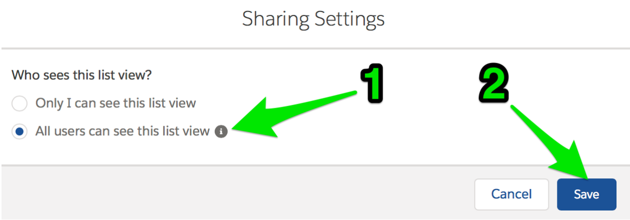
1. Select a custom list view that you want to share with others.
2. Open the **List View Control** and choose **Sharing Settings**.





The **Sharing Settings** dialog box appears.

3. Select `All users can see this list view` and press **Save**.



You have now shared a list view with everyone.

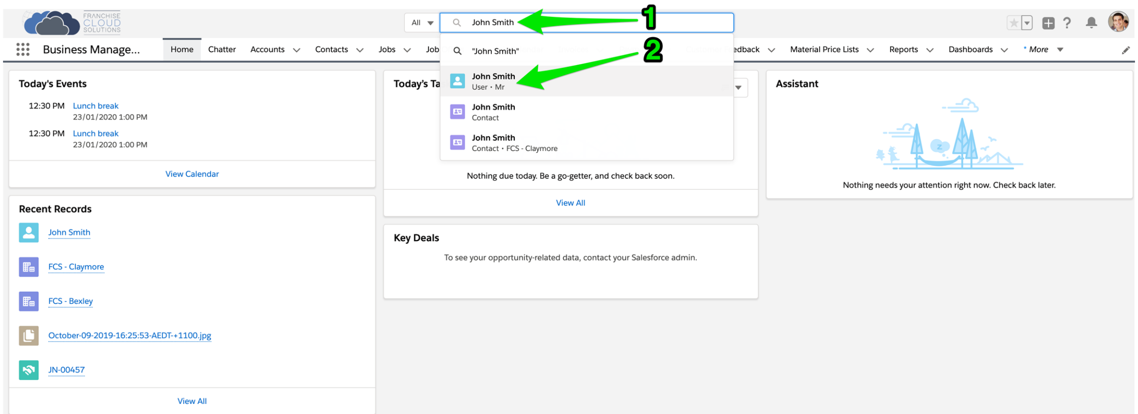
> The shared list view can now be edited by anyone with the `Manage Public List Views` permission.

On first use

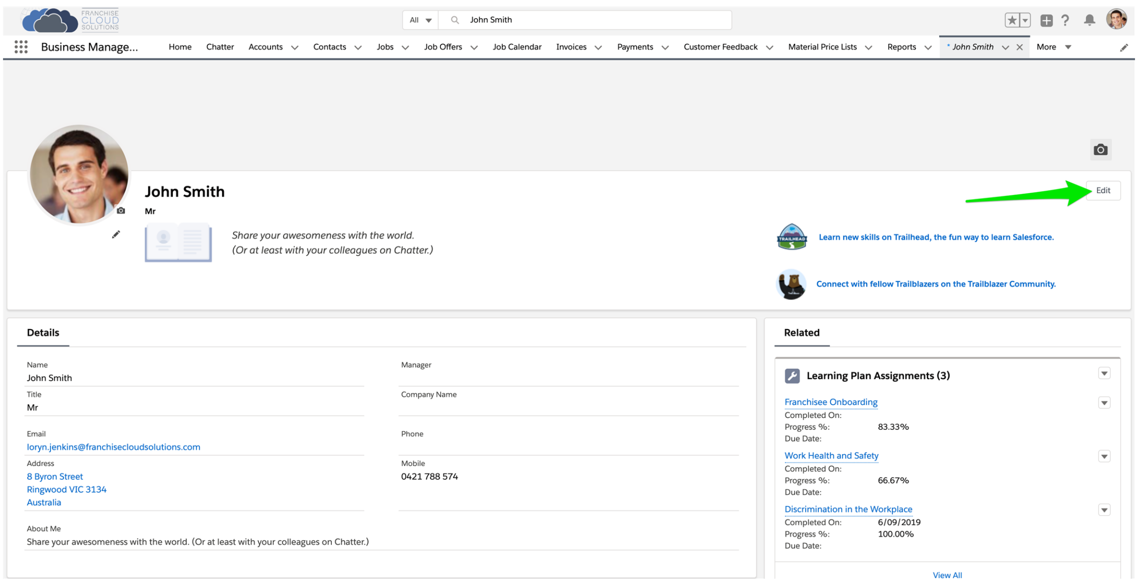
Here are some useful things to check the first time you use the system. Putting these things in place will help you be productive in your use of the system.

Ensure your user record is complete

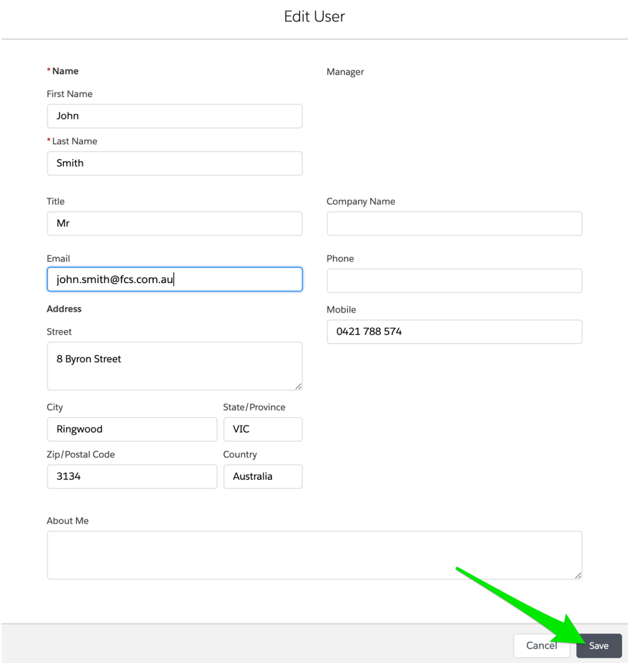
1. Using the search box, select your **User** record. *See* How to search for information.



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.



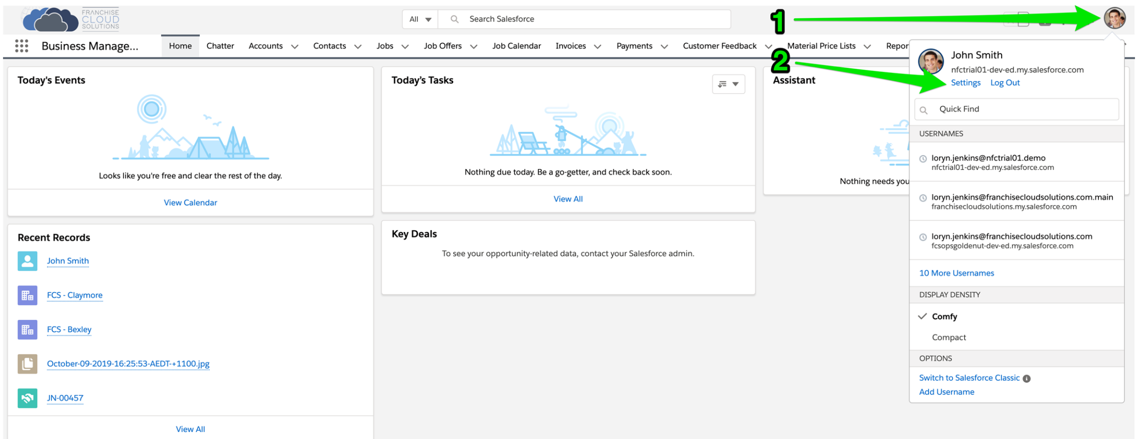
4. When you are finished editing, press **Save**.



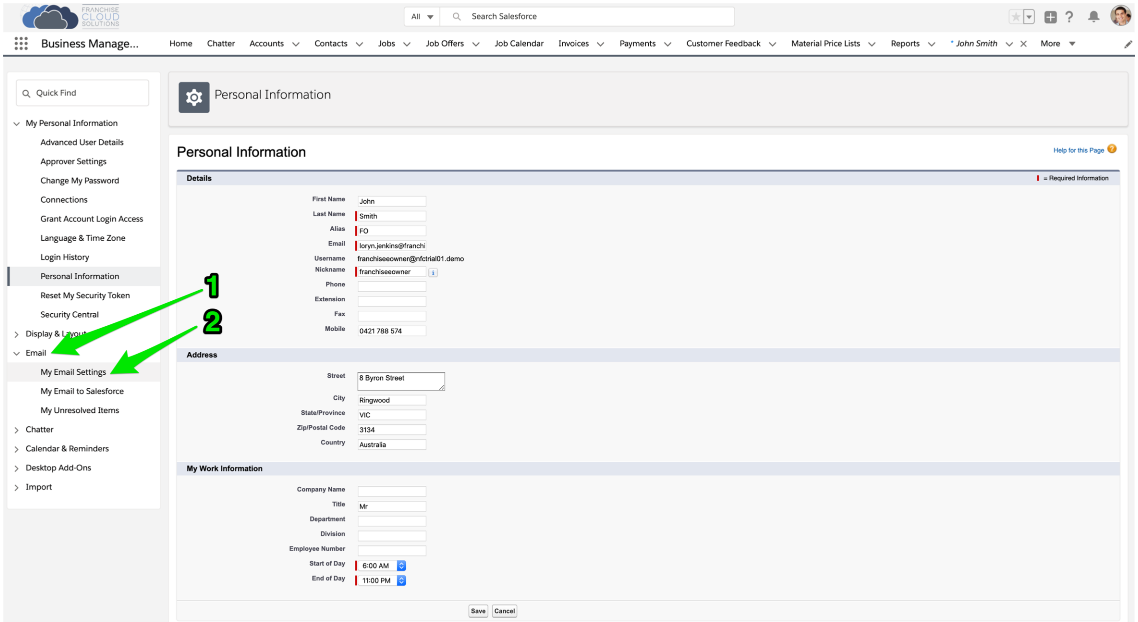
> If you change the Email address, as shown in these examples, you will need to confirm that this is your email address. You can do this by going to your email inbox, and clicking on the link in the email that Salesforce sends you.

Set a default email signature

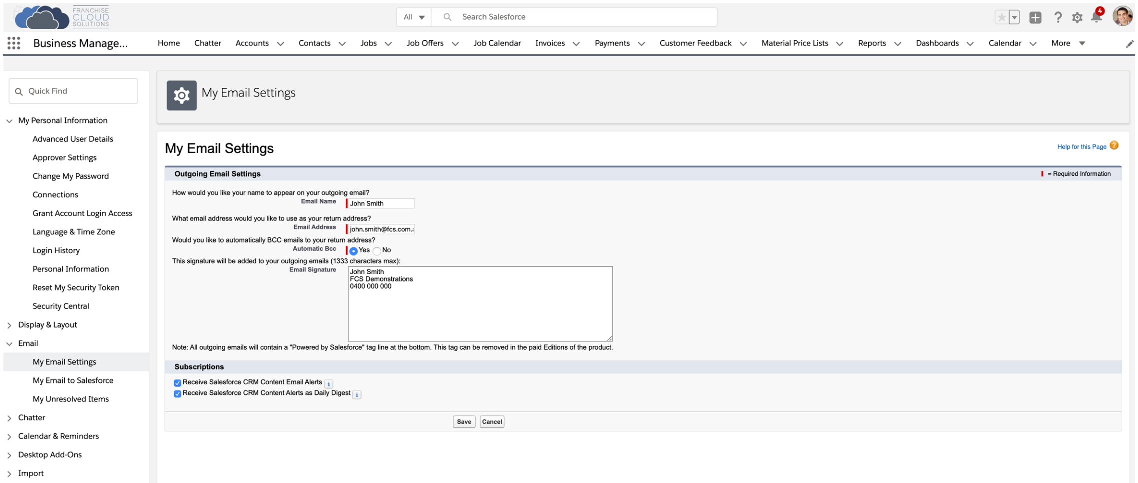
1. From **View Profile** choose **Settings**.



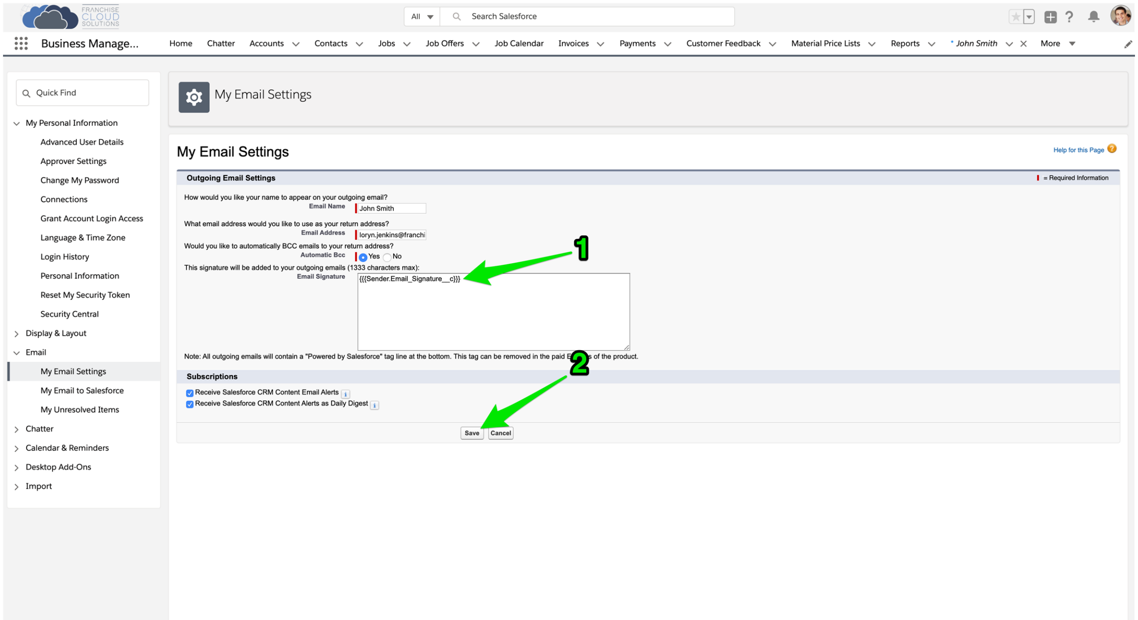
2. Go to **My Email Settings**.



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



4. In the `Email Signature` field, enter the code *{{{Sender.Email_Signature__c}}}* then press **Save**.



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 & Do` job

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.

CHAPTER 3

Working with Leads

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

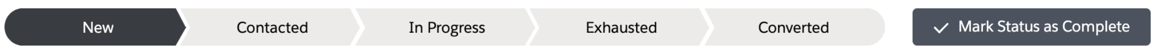
Qualified leads are converted to opportunities, *See* “How to convert a lead into an opportunity” on page 74.

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

- actions your or your team have taken
- responses by the candidate



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

- disqualify the lead, or
- convert the lead into a qualified opportunity

Lead status summary

Lead statuses are described below.

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 commitment 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 candidate 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:

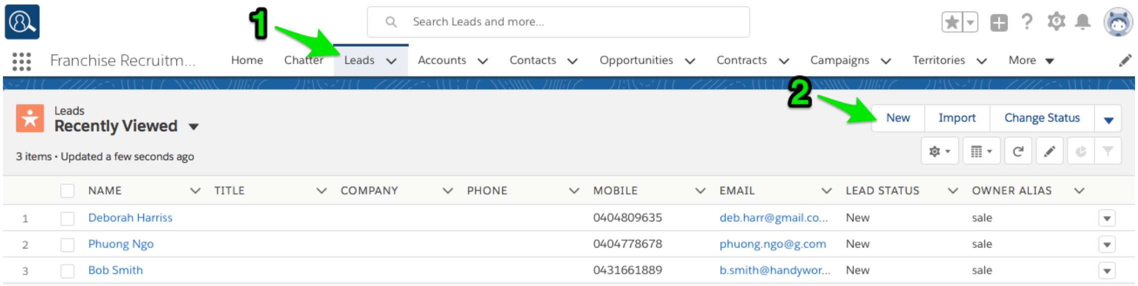
- When an individual responds to a lead, *See* "How to mark a lead as belonging to a campaign" on page 243.
- When you are sending offers to people already in your database, *See* "How to mark many existing leads as campaign members" on page 245.
- When you have a list of people outside Salesforce, *See* "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

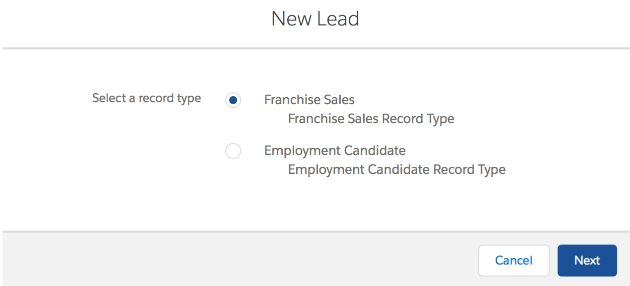
When you're answering a phone call, you will want to capture the details from the caller. To do this, you need to create a lead. Here's how you create a lead.

To create a new lead

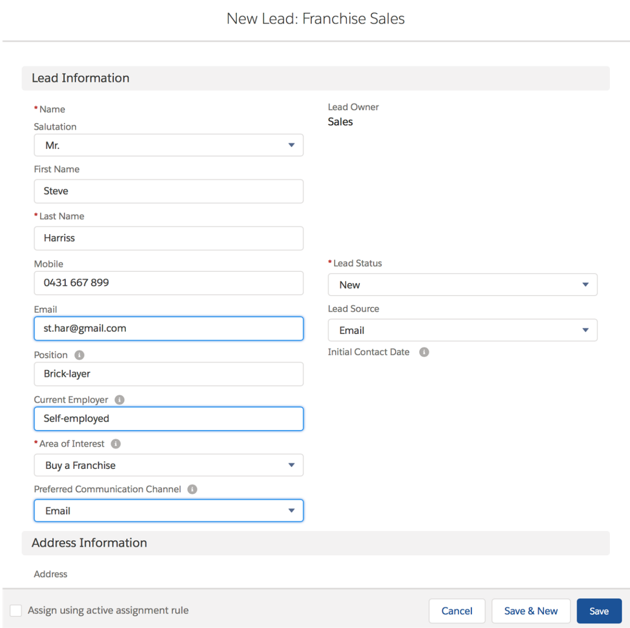
1. From the **Leads** tab, press **New**.



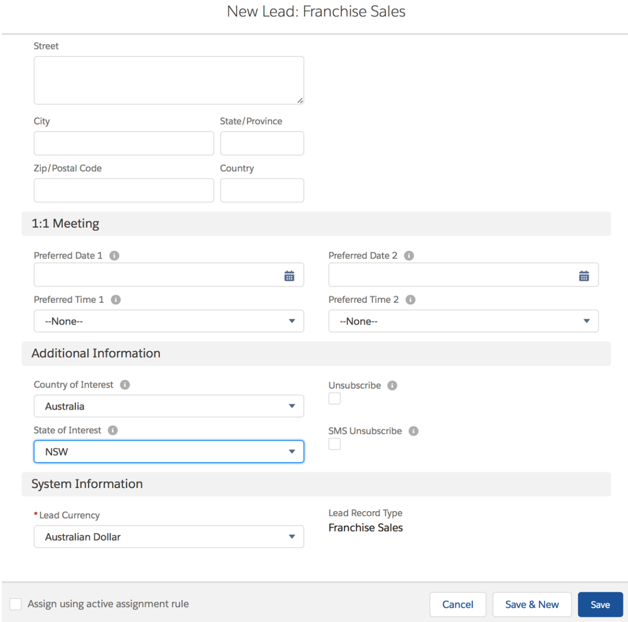
The **New Lead** dialog box appears.



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



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



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

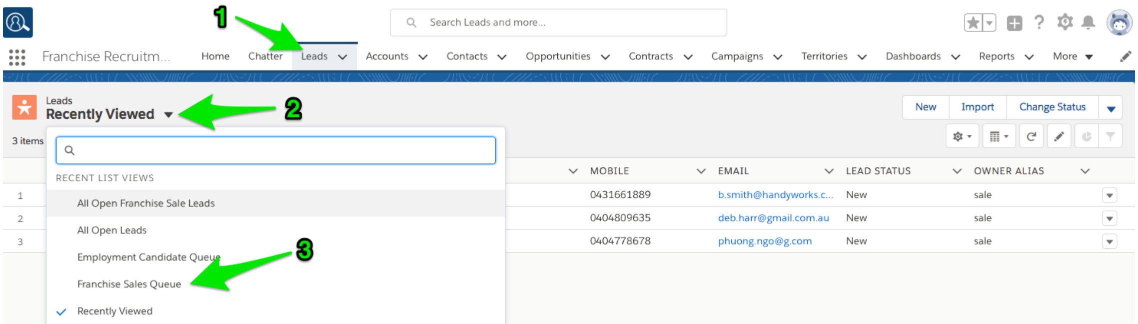
Website leads are automatically added to one of two queues. The queue is the owner of the Lead.

- 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

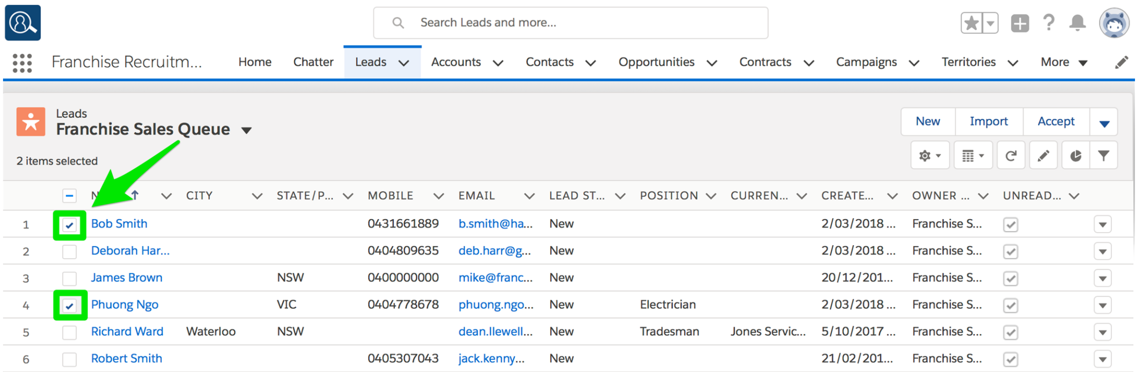
1. From the **Leads** tab, open the List View Filter and select the Franchise Sales Queue.



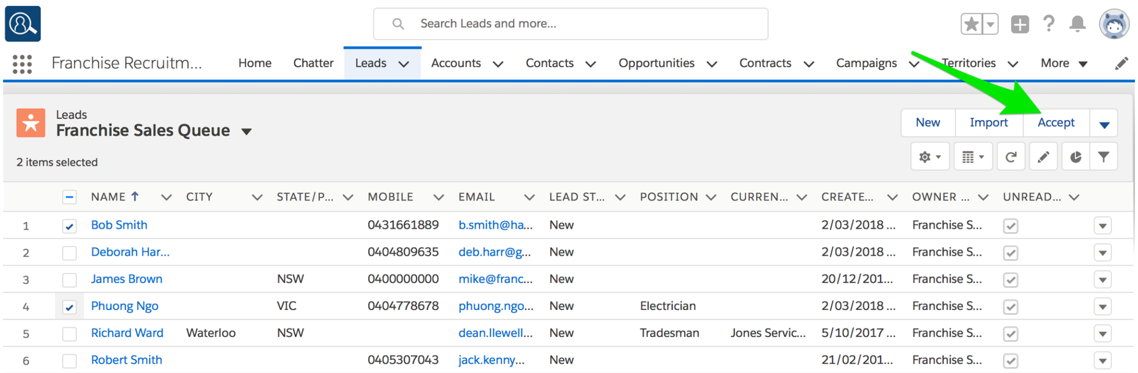
You can now see the list of leads that have come from the web.

To take ownership of the leads

1. Select the leads.



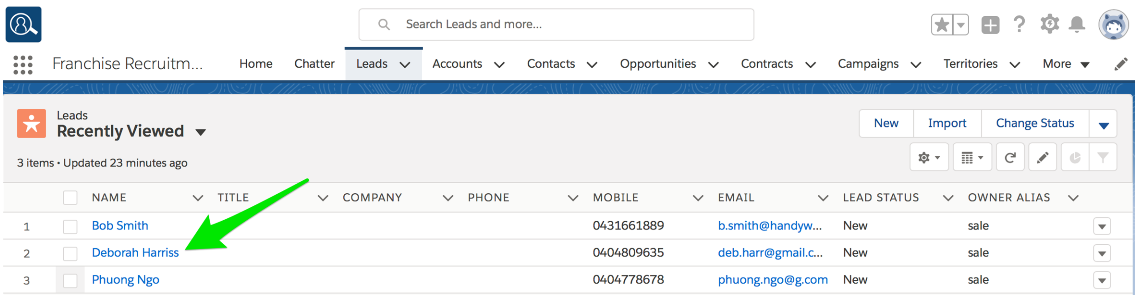
2. Press the **Accept** button.



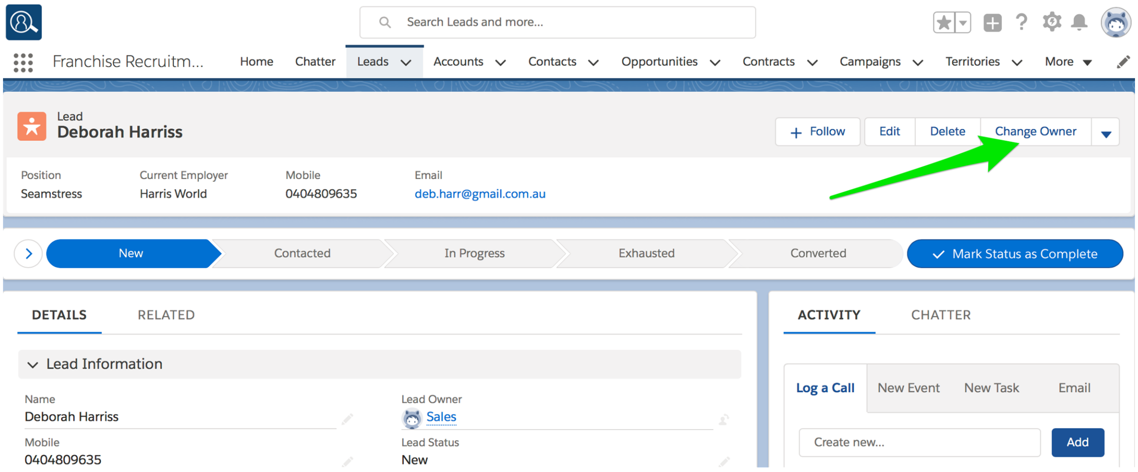
You are now the owner of the selected leads.

To assign leads to someone else

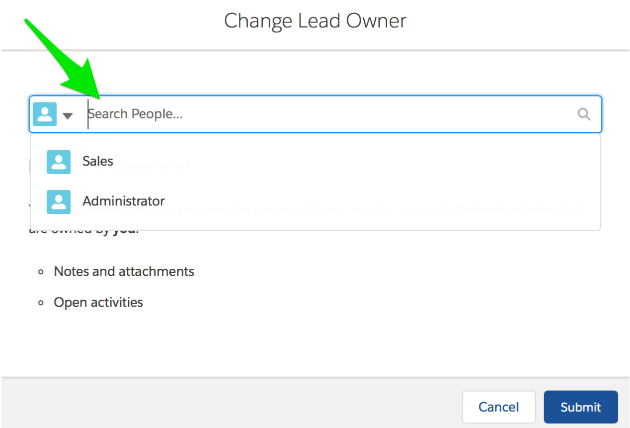
1. Open the lead detail.



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



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



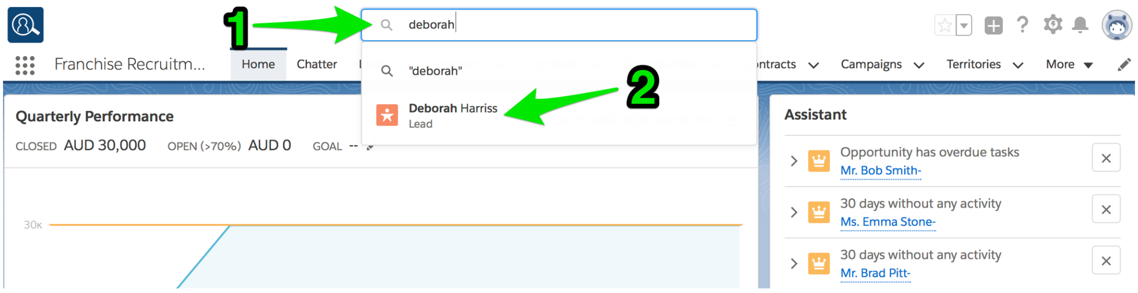
You have now assigned a lead to a person responsible for qualifying and developing the sales opportunity.

How to contact a lead

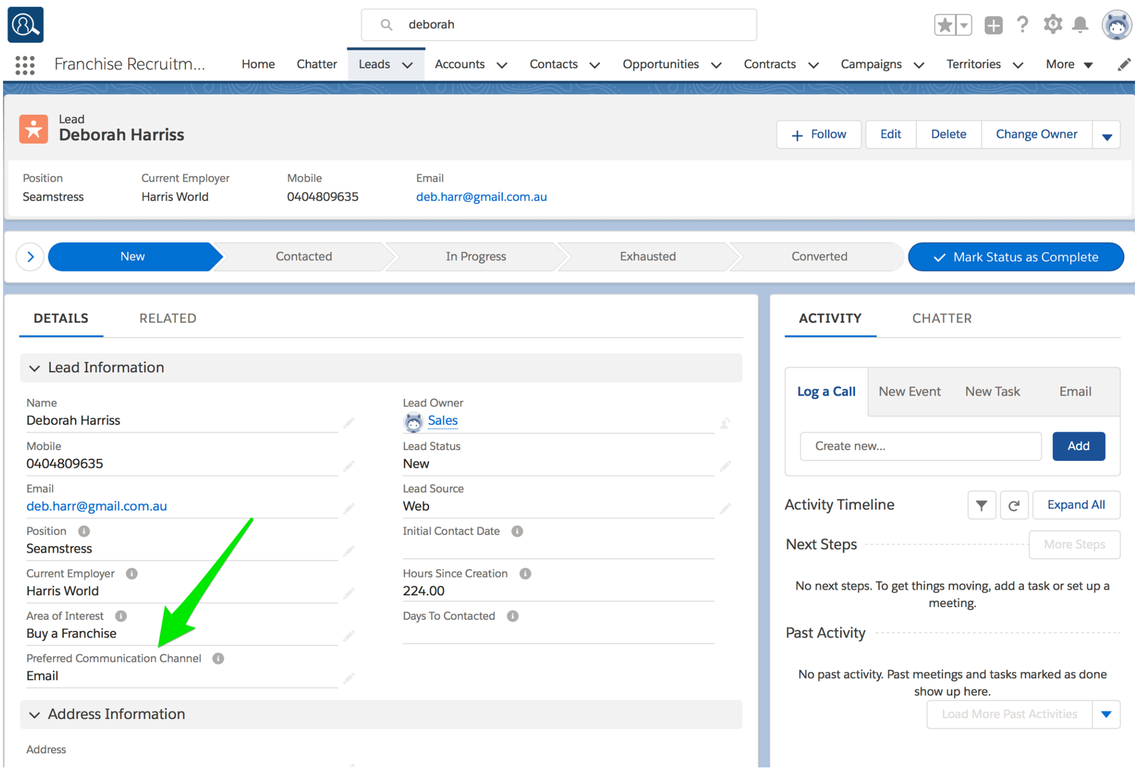
Franchise Recruitment provides the tools to track and record communications with each prospect.

To contact a lead

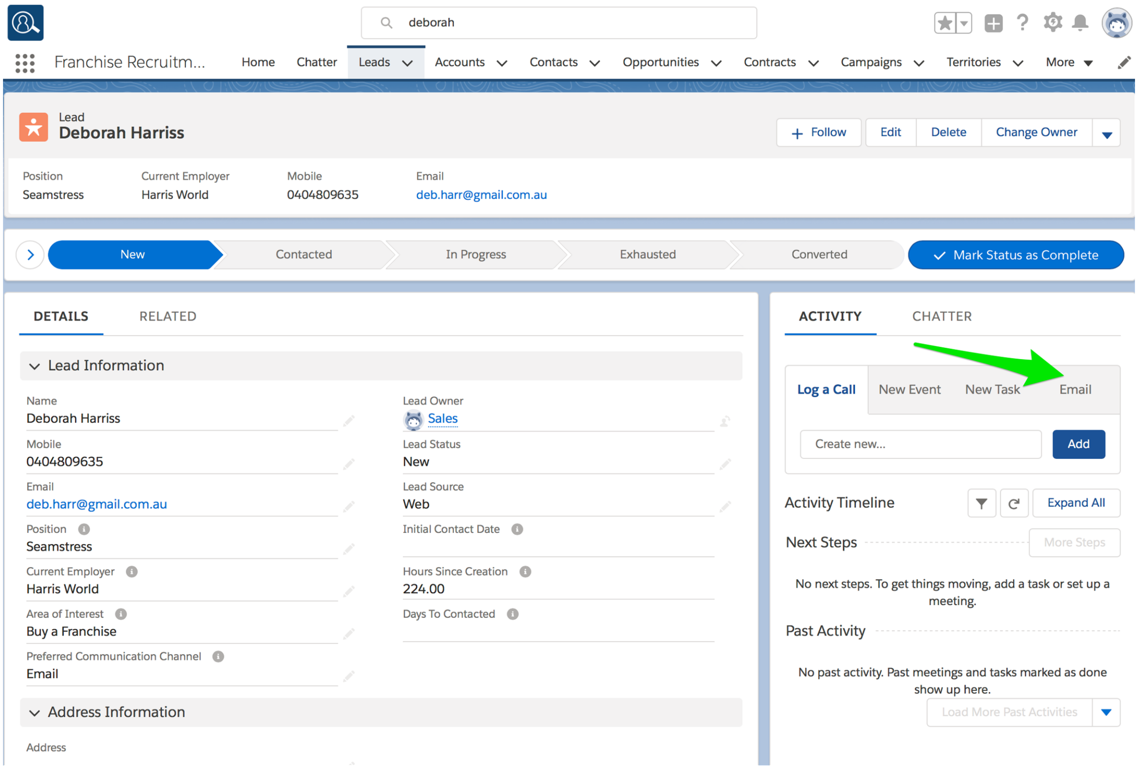
1. Search for the lead.



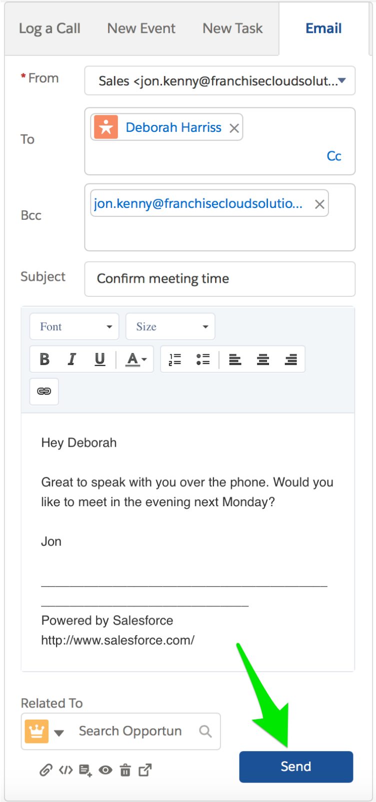
2. Open the lead detail, and note the prospect's **Preferred Communications Channel**.



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



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



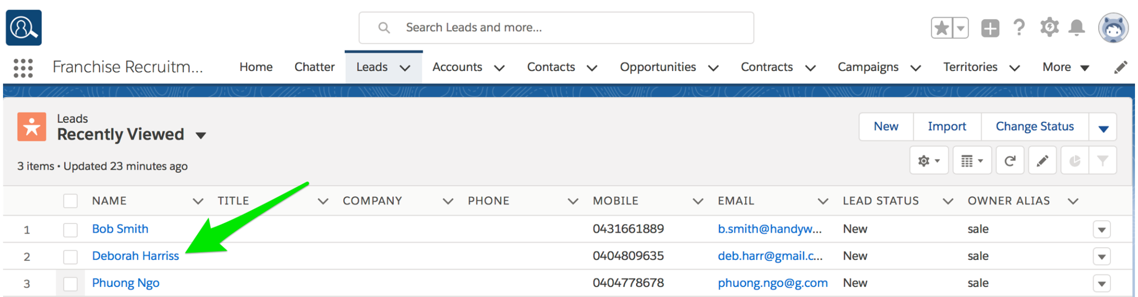
> Franchise Recruitment tracks all communications so that everyone can see what each prospect received. You can see the sent email in the **Past Activity** section.

How to disqualify a lead

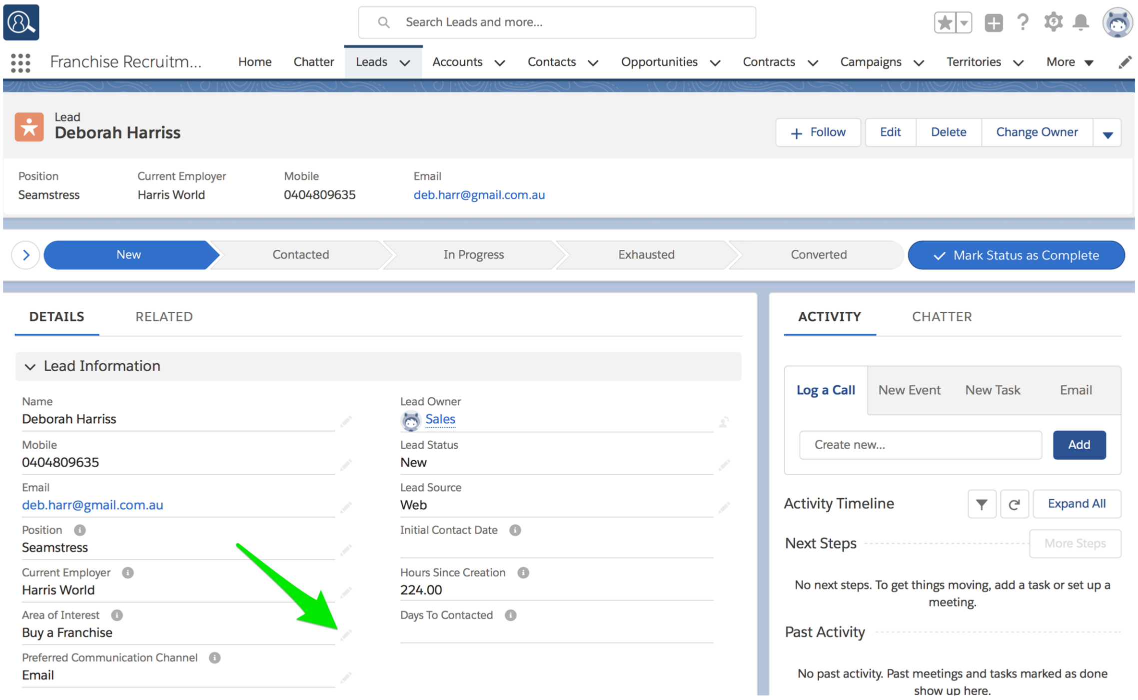
When you take a lead as a Franchise Sale, and it becomes apparent that the person is actually more suited to being an employment candidate, you can change the lead to an Employment Candidate type.

To change the Lead from Sales Franchise to Employment Candidate

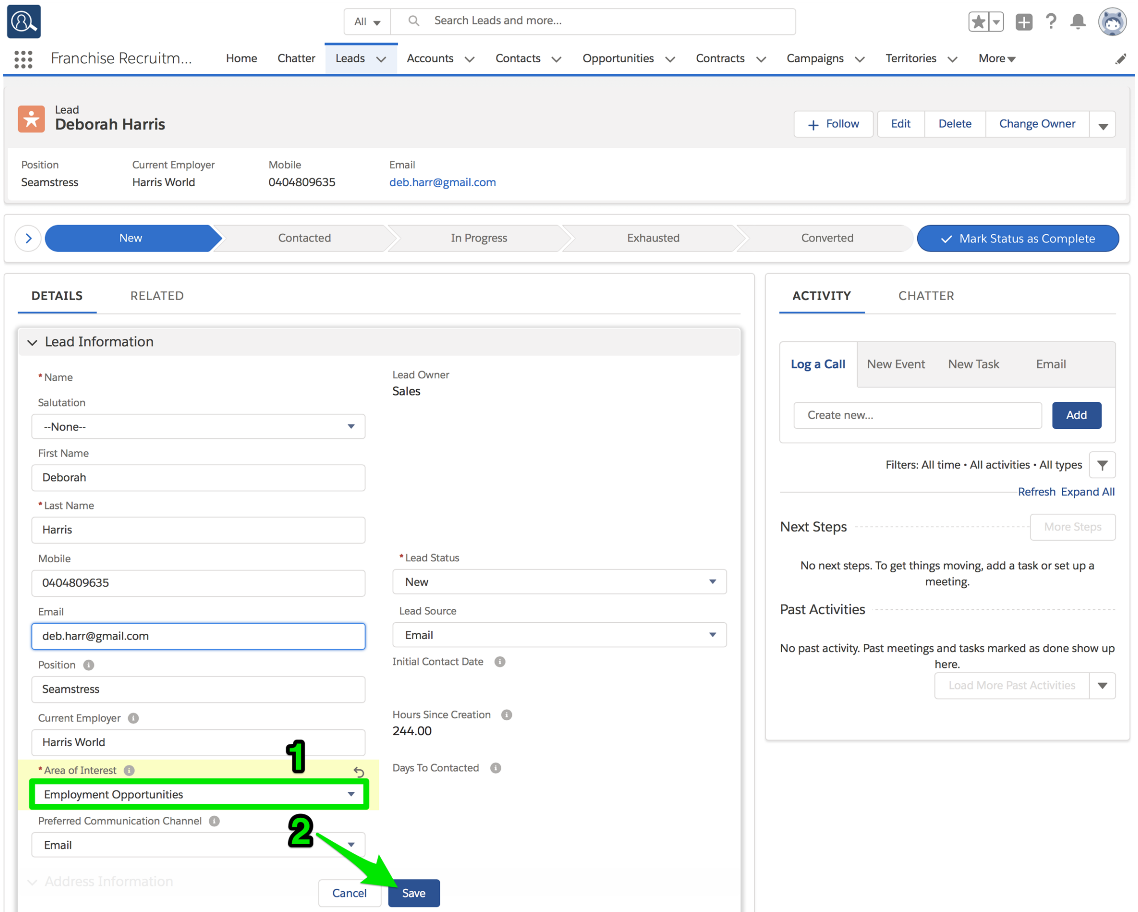
1. Locate the lead you want to change.



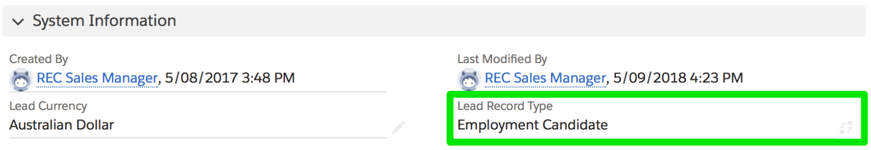
2. Open the lead detail and select the `Area of Interest` field for editing.



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



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



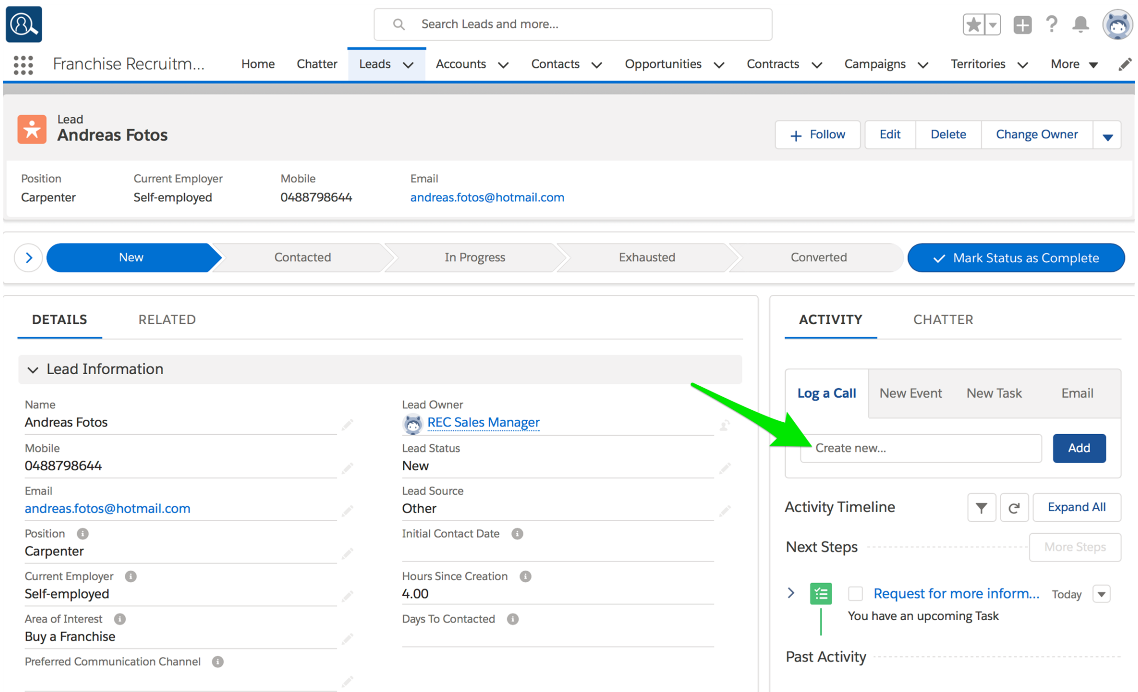
Candidate contact tools

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.

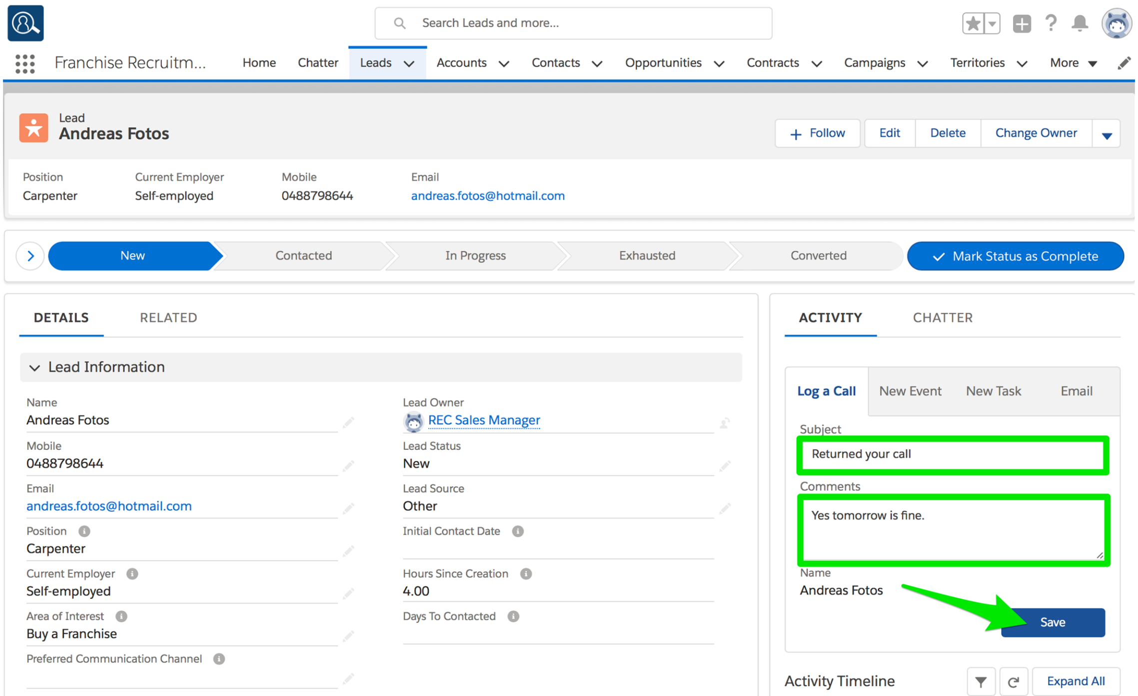
To record information

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…**

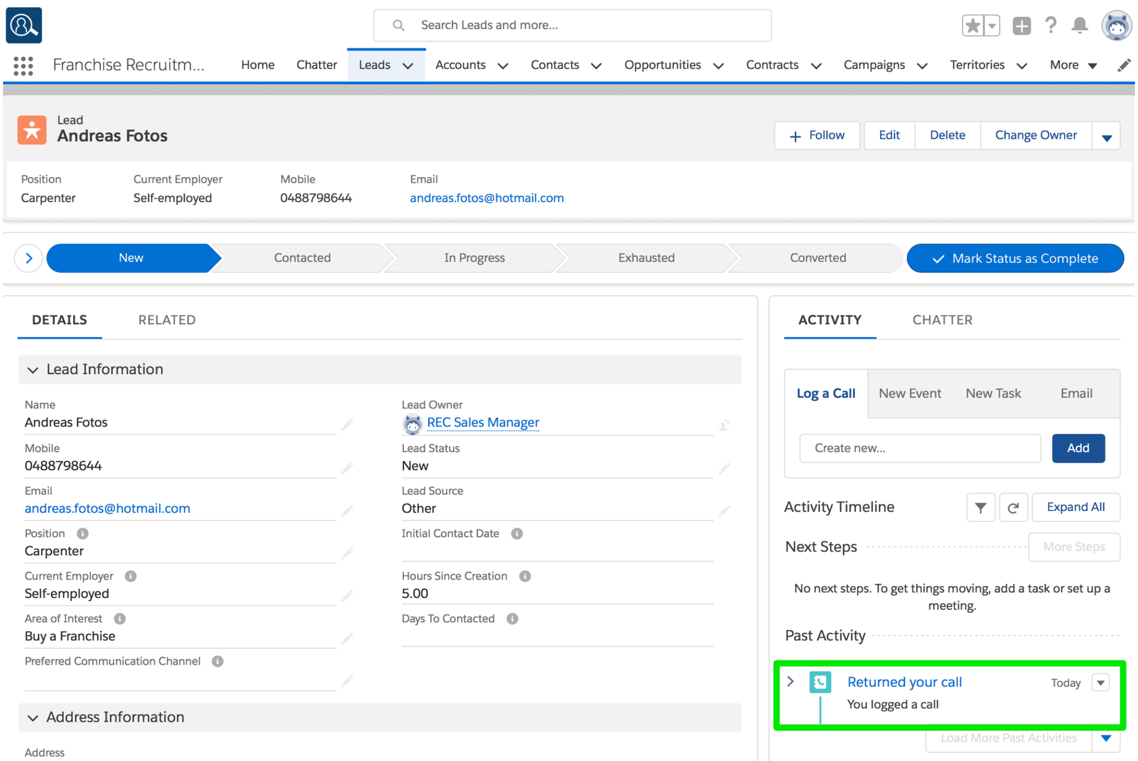


The **Log a Call** activity pane displays.

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



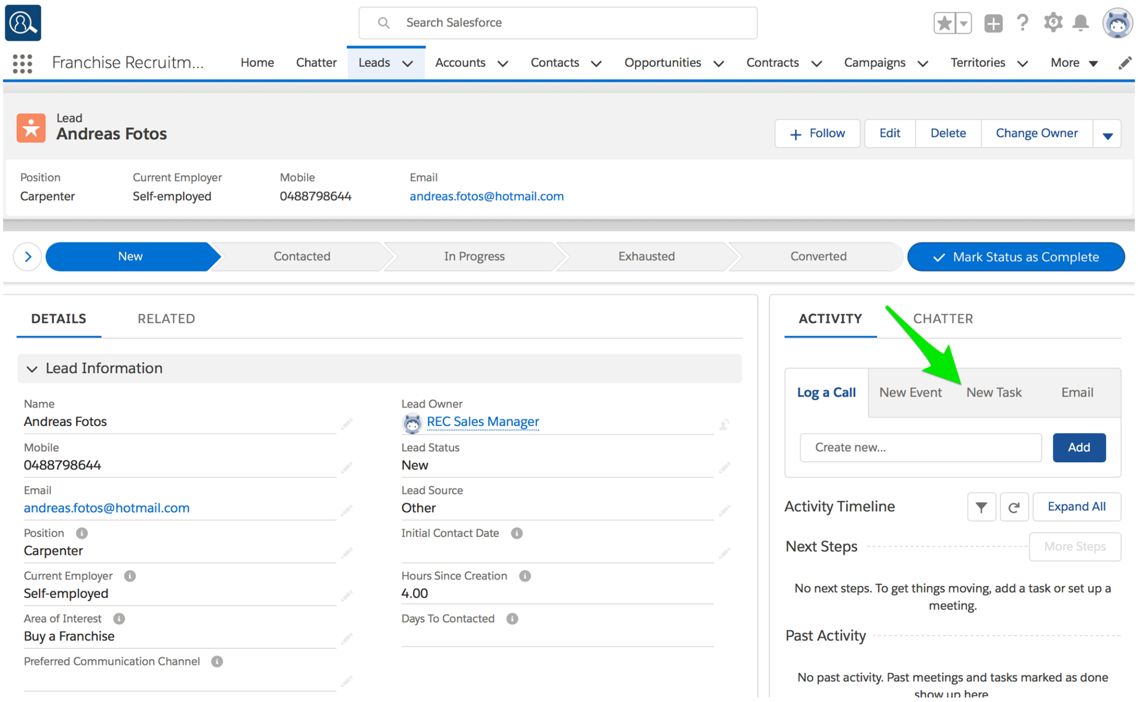
The call is saved to the record's **Activity Timeline**.



How to 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.



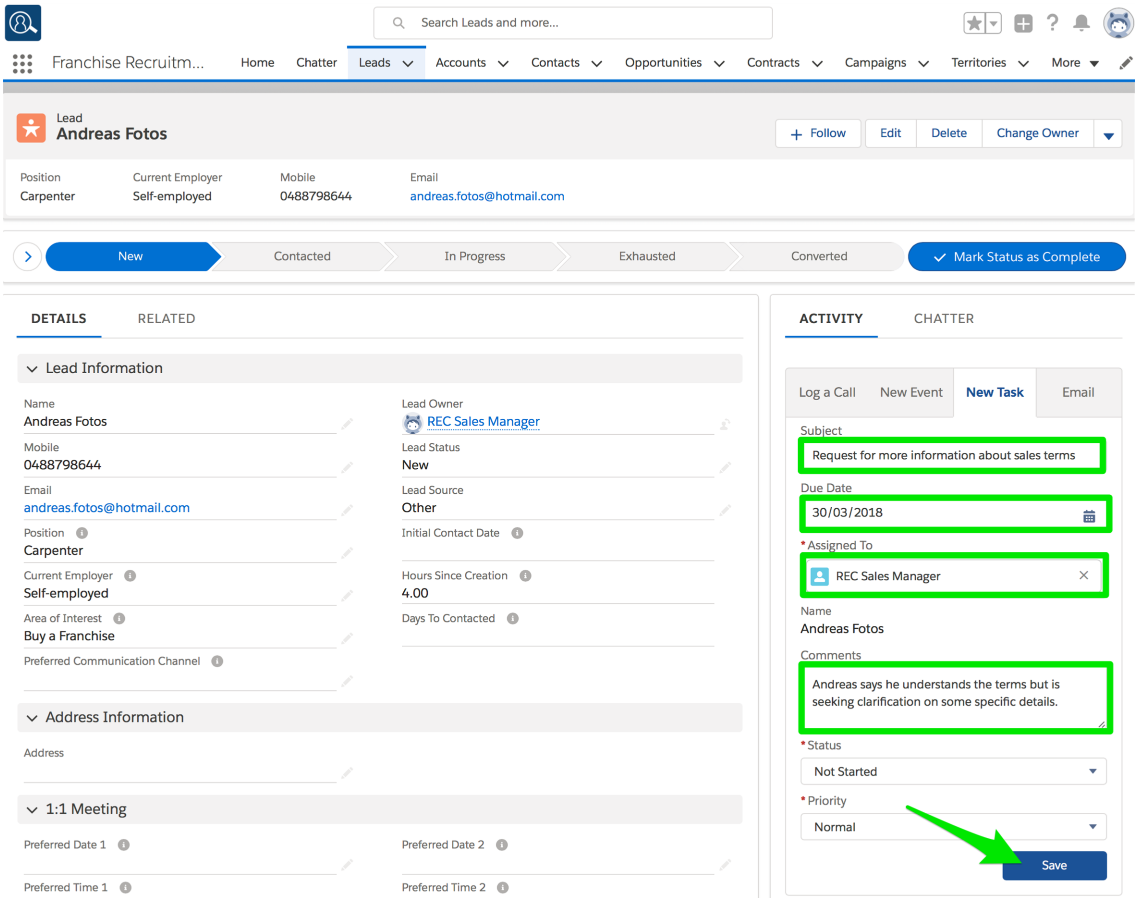
The **New Task** activity pane displays.

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

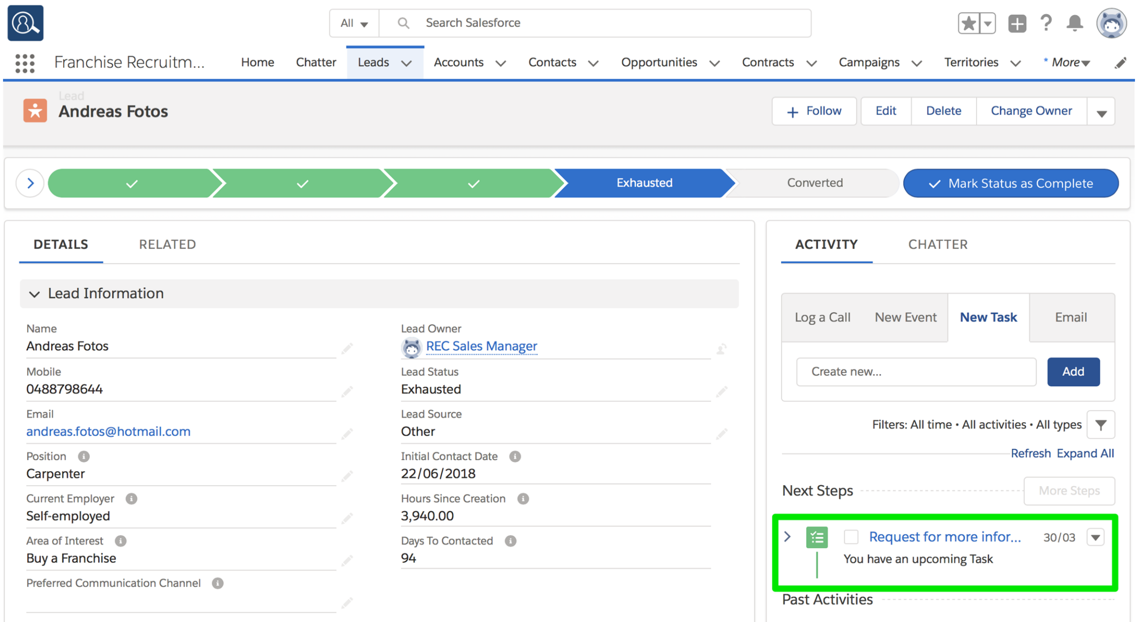
» Make the `Subject`and `Comments`describe the task in as much detail as you can.

» 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.



The new task is added to **Next Steps**.



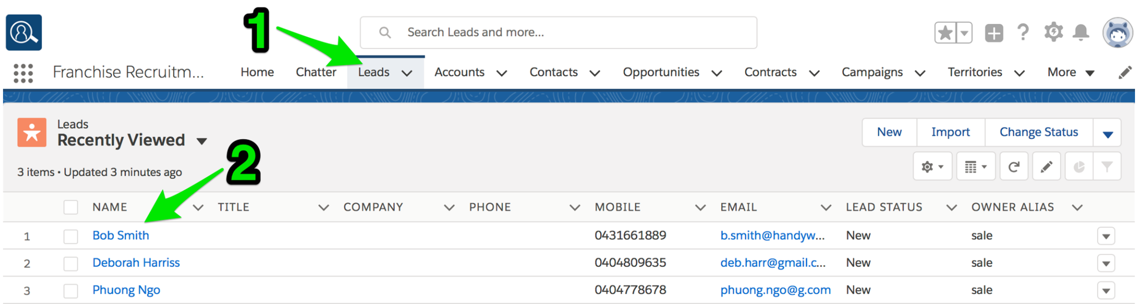
Qualifying leads

How to qualify a lead

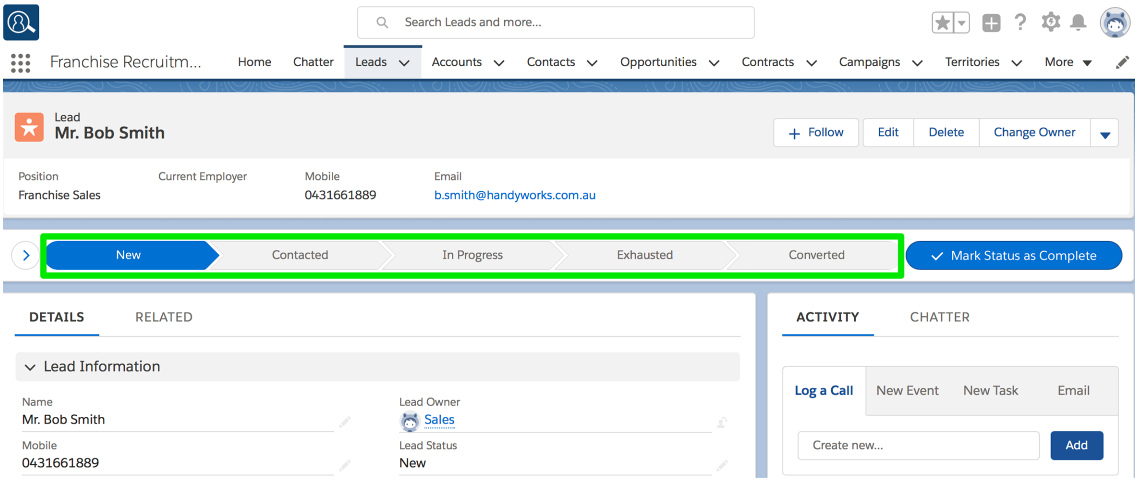
The Franchise Recruitment lead process is designed to support effective lead qualification. The Lead detail view contains the steps and statuses to help you do this well. The lead detail has a lot of information about the qualification process.

To explore the Lead detail view

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



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



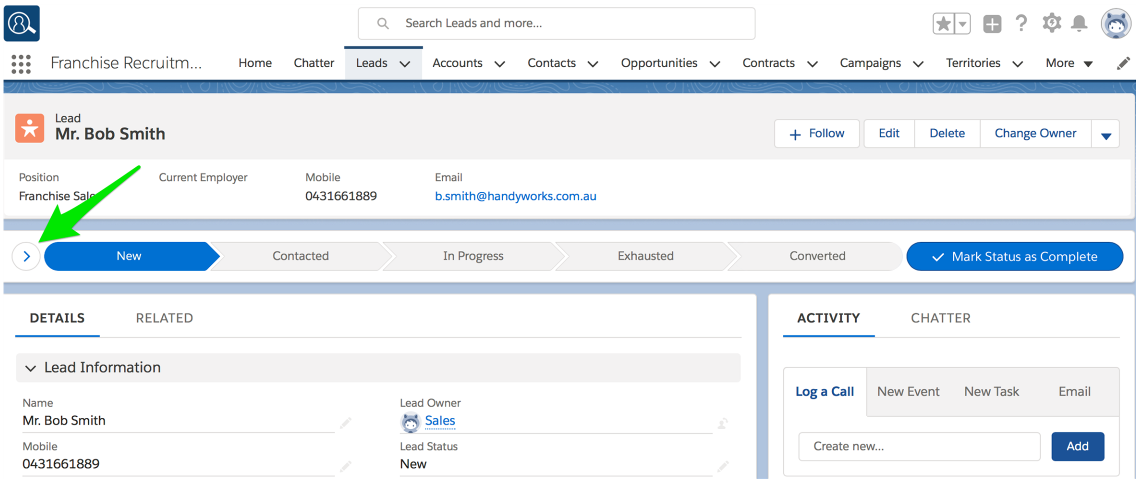
While the lead can capture a lot of information, the information that is critical is arranged at the top of the page.

These statuses show you the current state of the lead.

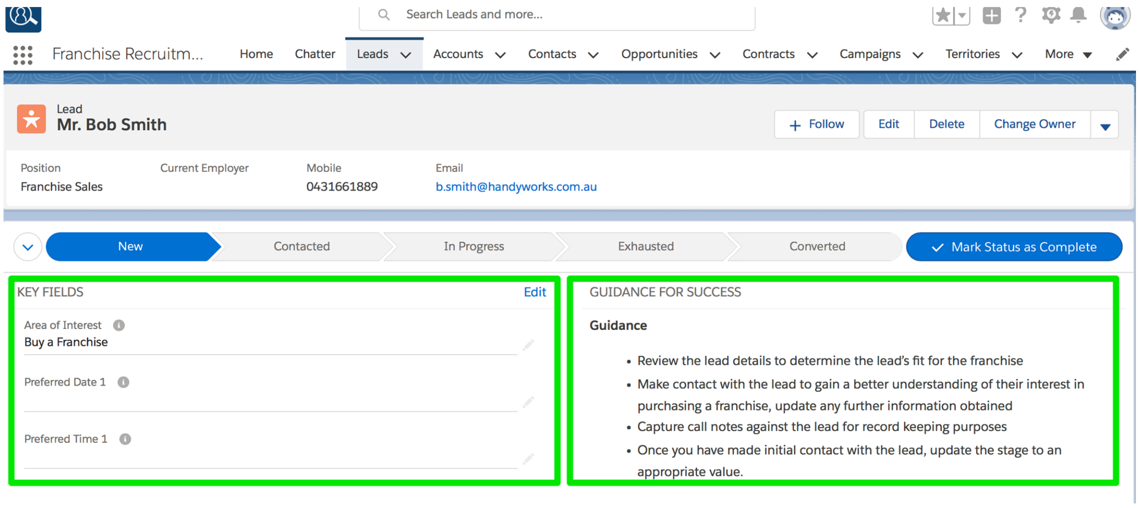
The purpose of the lead is to see who is likely to be serious about considering a purchase. A key indicator of intent is the willingness to meet in a one to one meeting.

- 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.



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



» **Key Fields** describes which of all the fields are most important for the qualification of the lead.

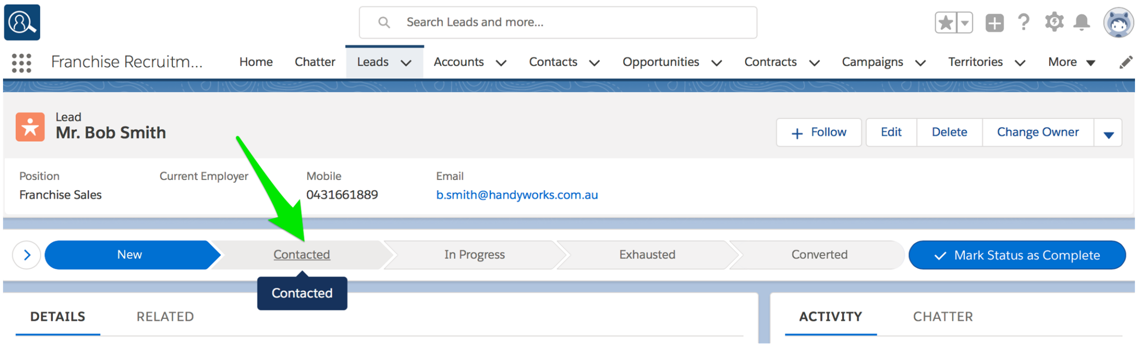
» **Guidance for Success** describes best practice for each status.

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

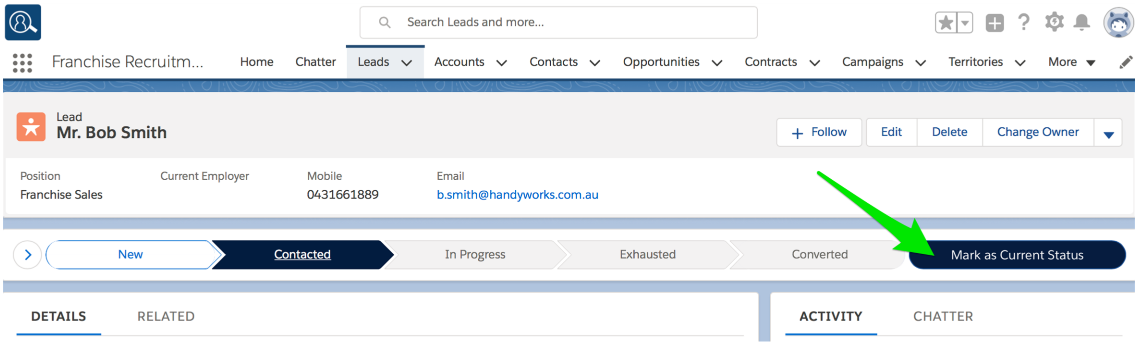
How to move a lead to the next stage

To move a lead to a target stage

1. Click on the target status indicator.



2. Press the **Mark as Current Status** button.



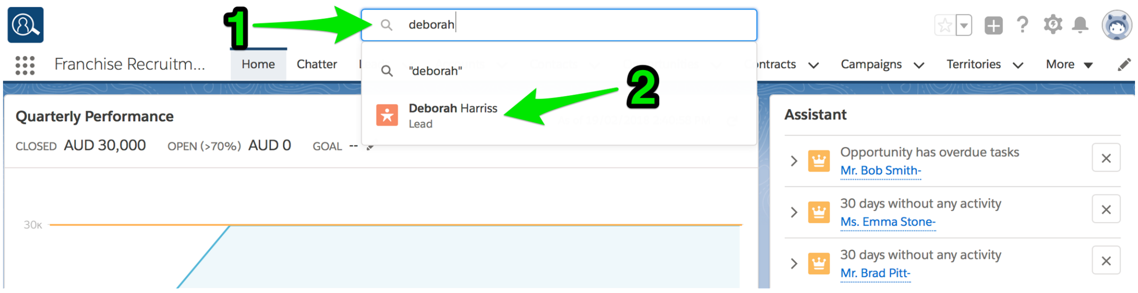
You have now changed the lead status.

How to send emails to my leads

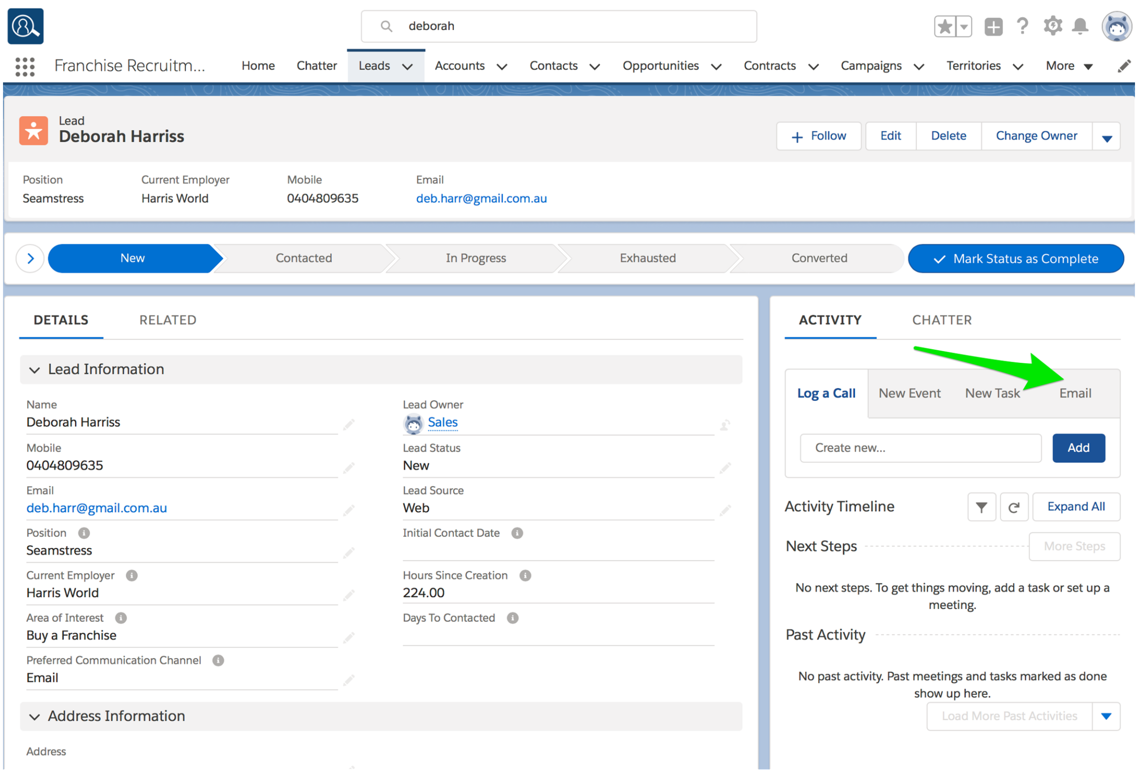
Franchise Recruitment gives you the capability of sending email to one or more leads. You can send an email to just one lead. Or you can send email to many of your leads at a time. Whenever you send emails, Franchise Recruitment stores the email in the lead activity history, so you will always know communication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

To send an email to one person

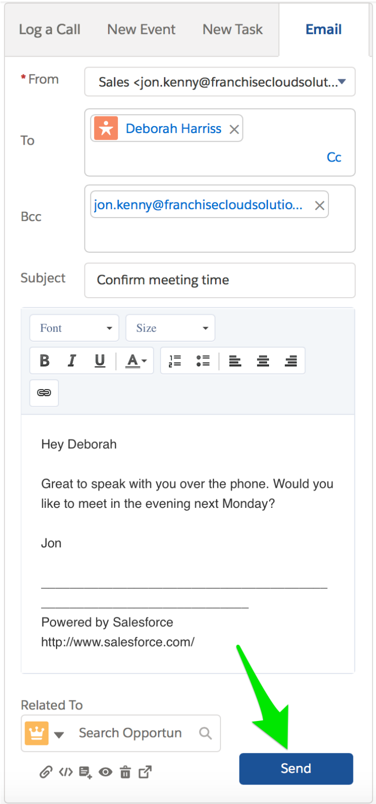
1. Search for the lead.



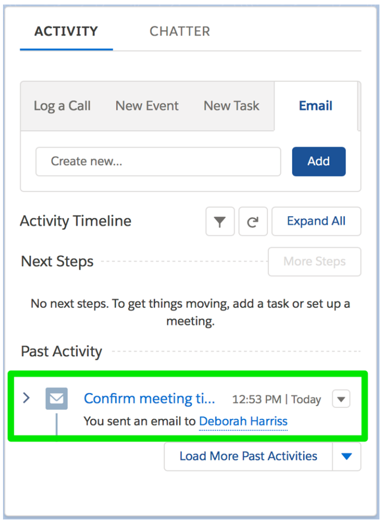
2. Open the lead detail, and click on the **Email** tab.



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



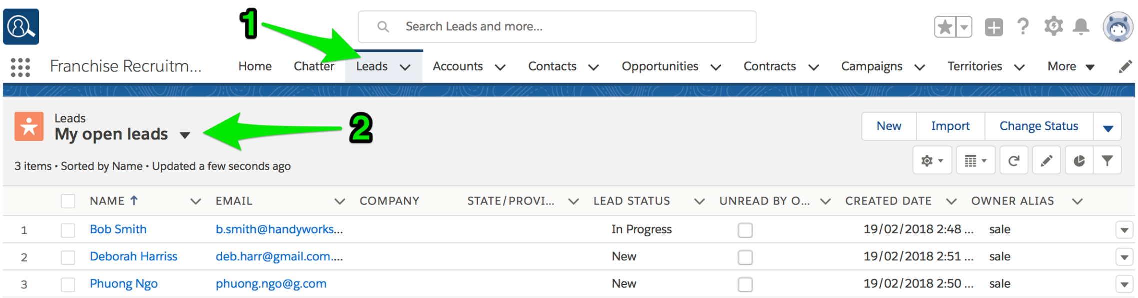
The email is now recorded in the lead's activity history.



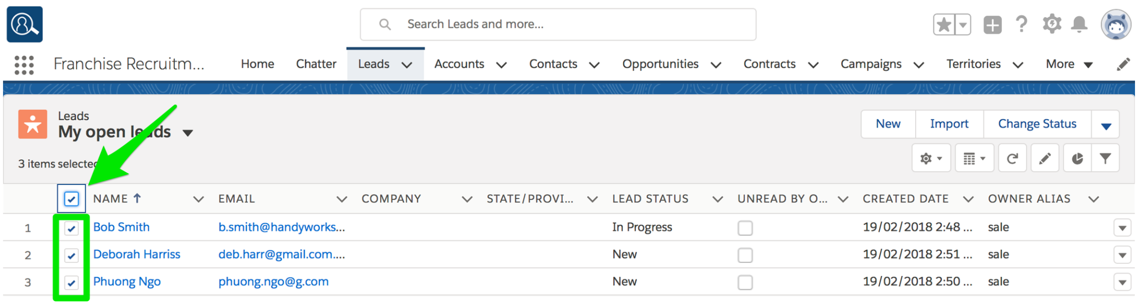
It is really simple to send a mass email to all your leads.

To email all my leads:

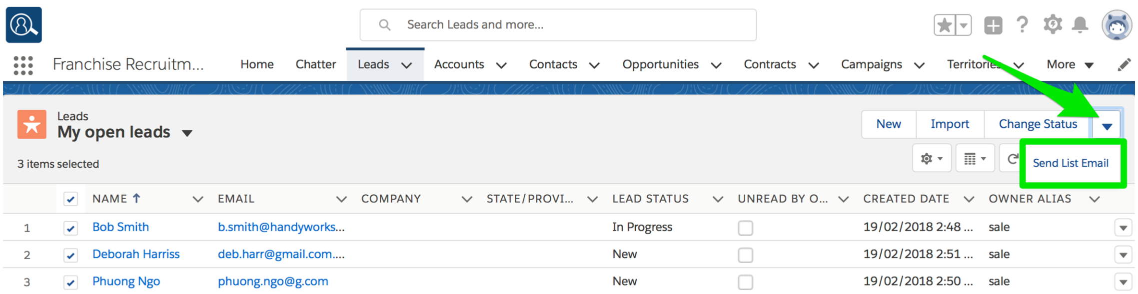
1. From the **Leads** page, select a filter to show all your open leads.



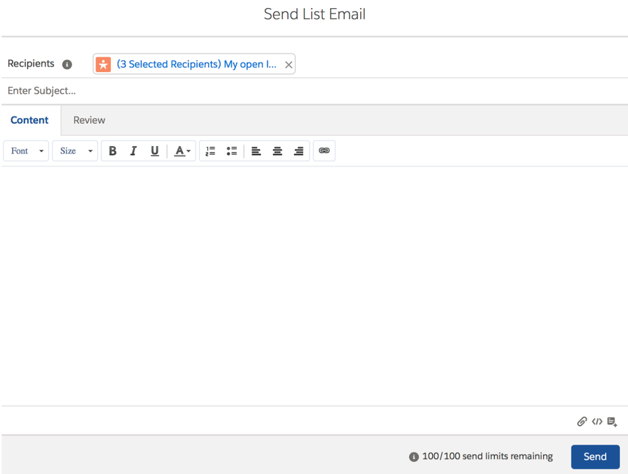
2. Select all the names on the list (or, everyone you actually want to send the email to).



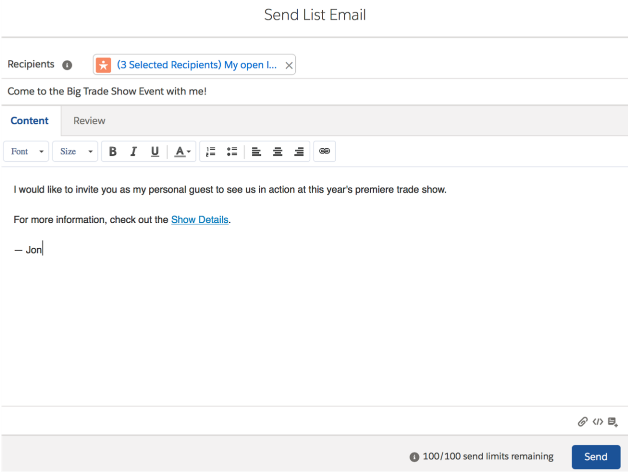
3. Now click on the down arrow button, to see the **Send List Email** menu item.



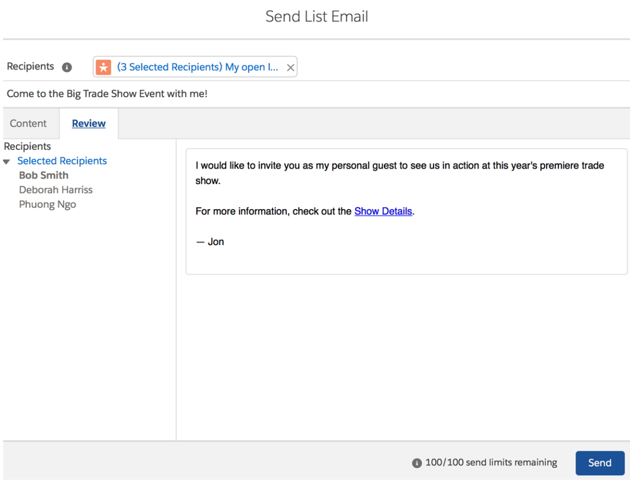
4. Click the **Send List Email** menu item. The **Send List Email** dialog box displays.



5. Now complete the normal details.

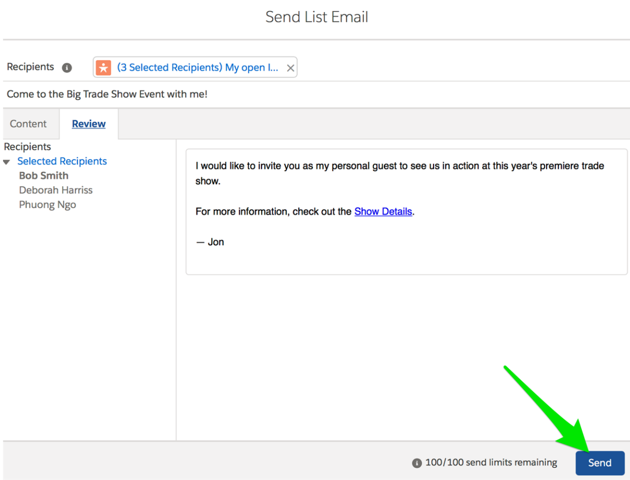


6. Before you send, press the **Review** tab.



Use the review page to make sure everything is as it should be.

7. When you are satisfied, press **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 [Edit List View Filters](#).

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

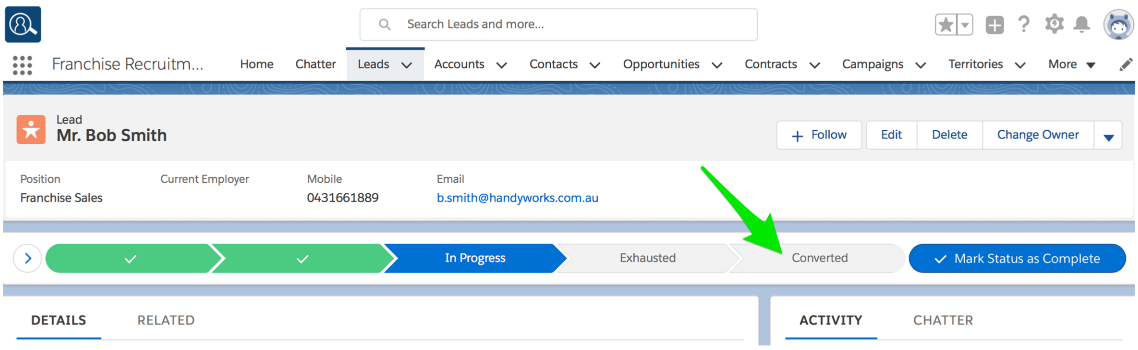
» reached an agreement for a one to one meeting, and

» set a date for the meeting

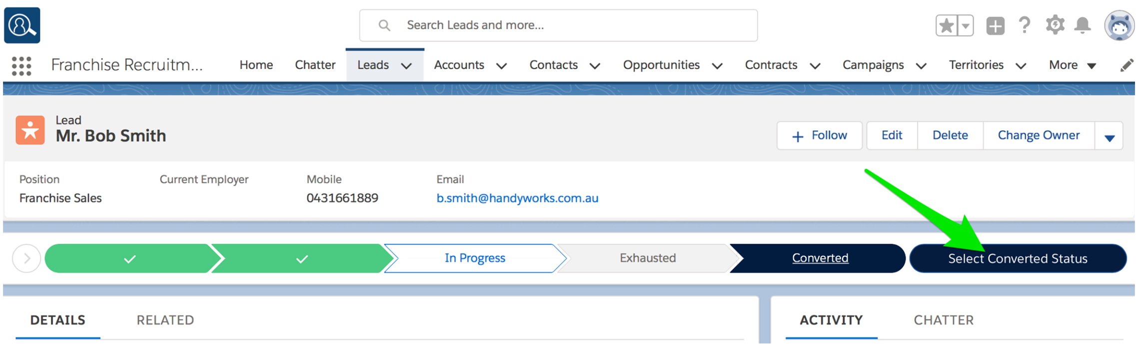
When these items have been met, then you are ready to indicate that the lead has been qualified. You do this by converting it into an opportunity. An opportunity is the next stage in the sales process. It supports the on-going activity needed in order to close the sale.

To convert the lead into an opportunity

1. Click on the **Converted** status.



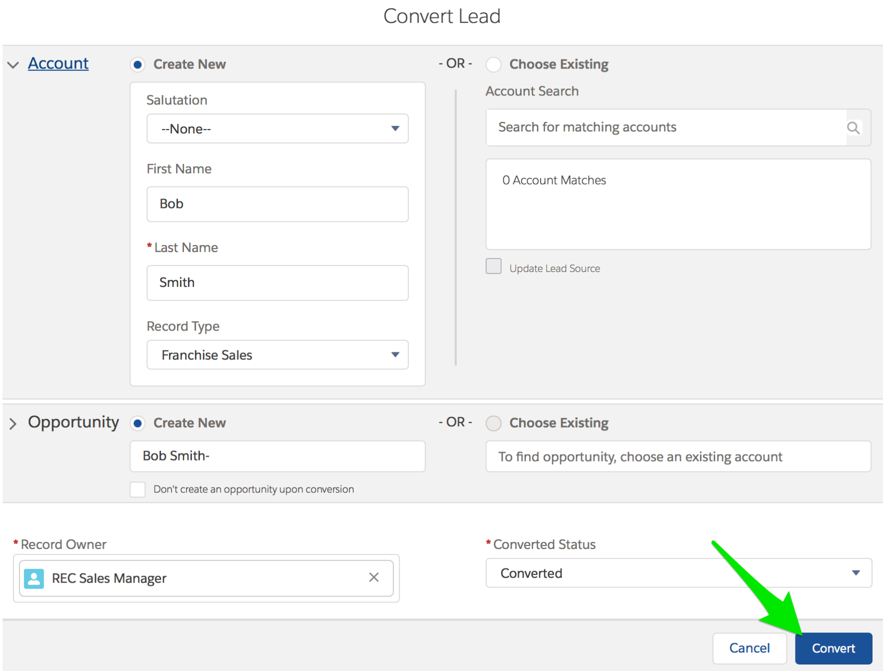
2. Press **Select Converted Status**.



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**.



> 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.

CHAPTER 4

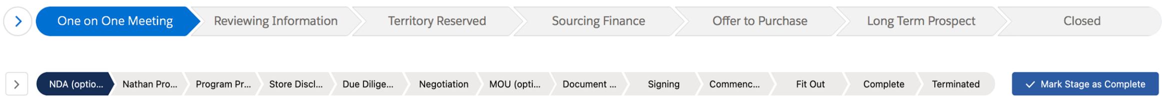
Working with Opportunities

The Opportunity Process

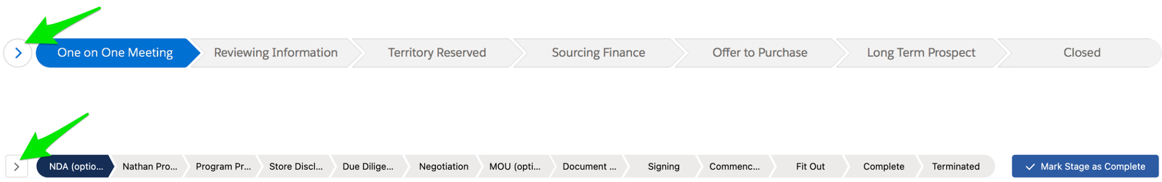
An opportunity represents a person who has been qualified as a prospective purchaser of a franchise. They have expressed interest in a purchase, appear to be a reasonable fit for your franchise, and have agreed to a one on one meeting to discuss a purchase.

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.

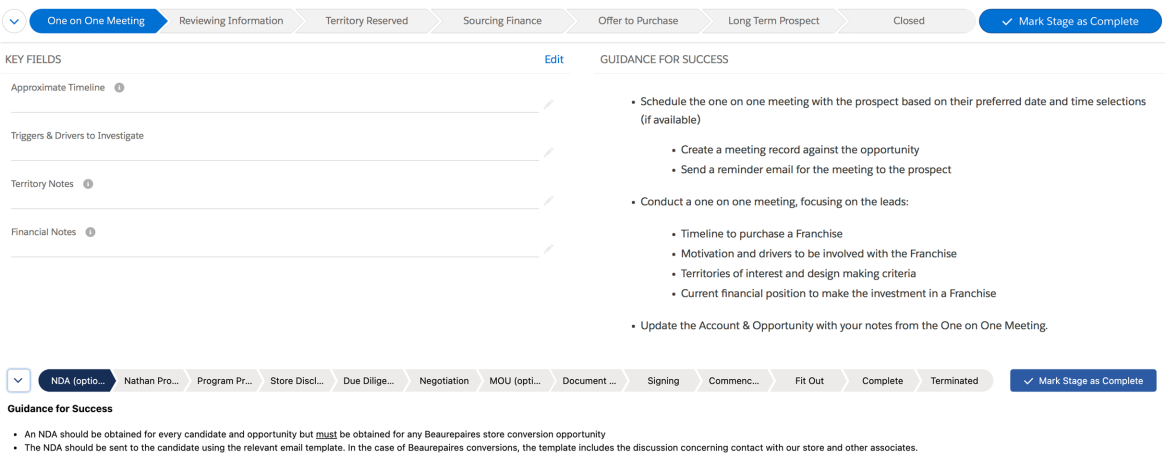
The Franchise Recruitment opportunity process consists of a number of statuses with specific activities to be achieved at each stage.



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



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 Meeting	You are gathering the information contained within the 1:1 Meeting form	» Schedule the one on one meeting with the prospect based on their preferred date and time selections (if available) » Conduct a one on one meeting. » Update the Account & Opportunity with your notes from the One on One Meeting
Reviewing Information	You have gathered all the 1:1 Meeting information and are reviewing it	» Update the Territories of Interest recorded against the opportunity as the prospect makes their selection » Update any new information on their approximate timeline » 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 » Update the Opportunity Product with the correct Product and Territory being purchased. This will reserve the Territory for this Opportunity.
Sourcing Financing	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
Offer to Purchase	Contract and disclosure documents have been provided to the candidate	» Capture all the details required for the contract » Create the draft contract record for the opportunity, include all fees, performance criteria and guarantors as required » Generate all relevant disclosure and legal documents 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 content marketing campaigns.

Stage	Description	Keys to Success
Closed	Opportunity is complete	» Once contract is finalized, update the opportunity to Closed - Won or if the prospect does not proceed then Closed - Lost.

Stage	Keys to Success
NDA (optional)	» An NDA should be obtained for every candidate and opportunity but must be obtained for any Beaurepaires store conversion opportunity » 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.
Nathan Profiler	» Request the Franchising & Licencing Director, Business Manager or their delegates to initiate the Nathan Profiler process with the candidate » The candidate must have completed both the Information Request and the Self Assessment of the Nathan Profiler and copies of both reports (available from the person initiating the process) should be saved in Franchise Cloud Solutions » Evaluate the reports carefully and, as necessary, raise any concerns with the the Franchising & Licencing Director or Business Manager
Program Presentation	» 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 » Make notes of this meeting in Franchise Cloud Solutions, including 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
Store Disclosure (Optional)	» This stage only applies to Beaurepaires conversion opportunities » Request a standard store disclosure document for the stores/-territories you are discussing with the candidate » Provide the document to the candidate and save a copy in Franchise Cloud Solutions
Due Diligence	» This stage is complete when the candidate provides a business plan or otherwise indicates they do not wish to proceed » The business plan should be reviewed and any areas of concern noted for clarification or correction and a copy saved in Franchise Cloud Solutions
Negotiation	» The stage is complete when there is a "meeting of the minds" with respect to the deal, any special conditions, etc. » 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) network, 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.
MOU (optional)	» A Memorandum of Understanding applies to Beaurepaires conversion opportunities and, on extremely rare occaisions to other types of opportunities » 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 Prep	» Advise the Franchising & Licencing Director or Business Manager you require agreements and/or disclosure document to be prepared by assigning them a task. » Ensure the relevant fields in the MOU / Contract Information section are completed and that the related territory has a premises address.

Stage	Keys to Success
Signing	» Once the relevant documents have been prepared, the Franchising & Licencing Director or Business Manager will send them to the candidate via Docusign. » 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 Commencement.
Commencement	» This stage is complete once the candidate has commenced trading
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 documentation 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

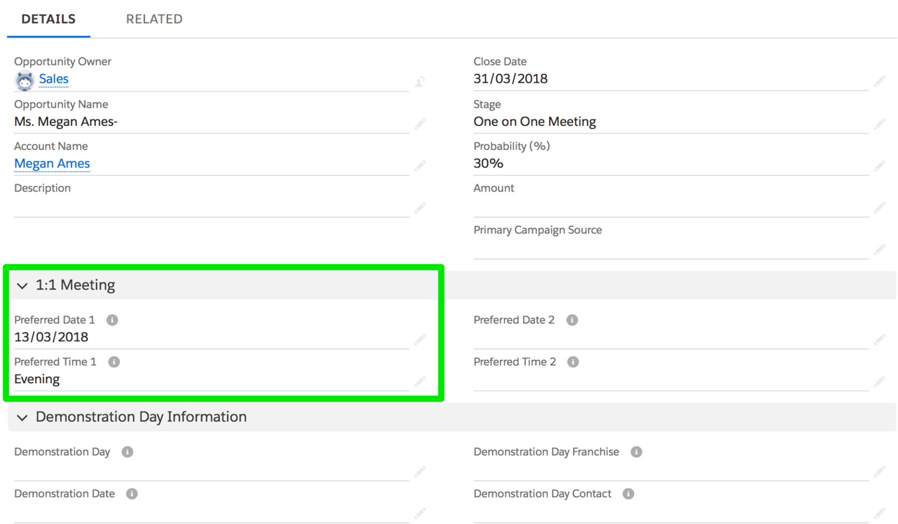
The one on one meeting is one of the most important steps in the sales process. In this initial meeting, the sales representative should aim to determine:

- 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.

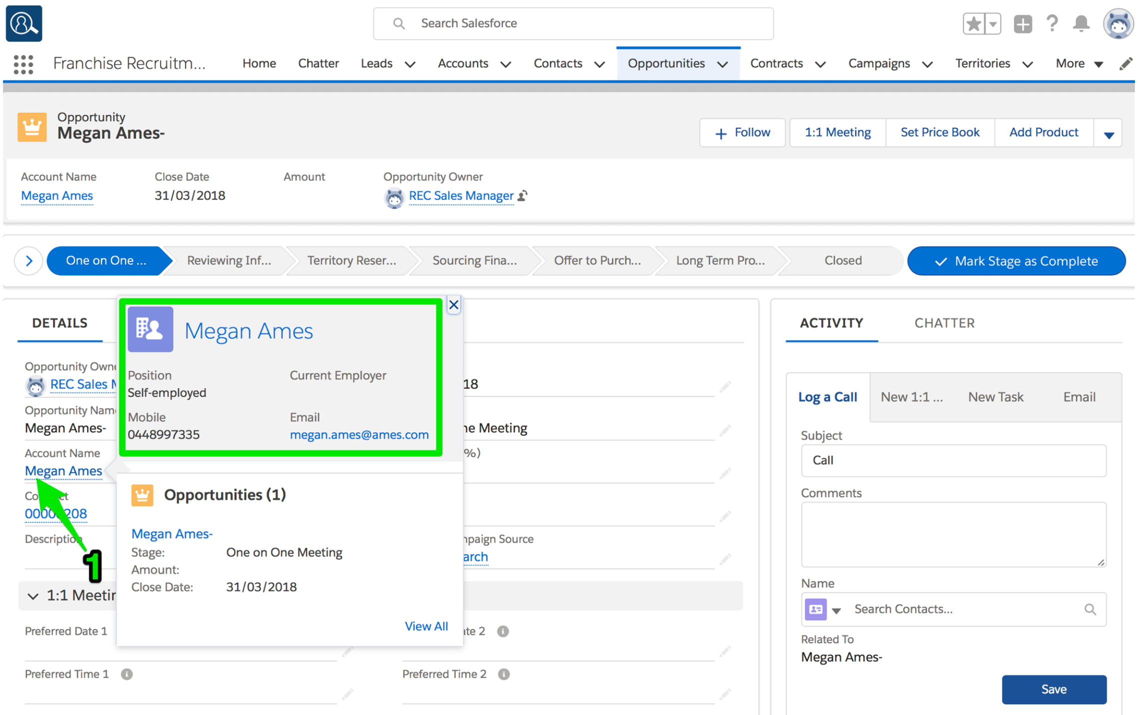
How to schedule a one on one meeting

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.



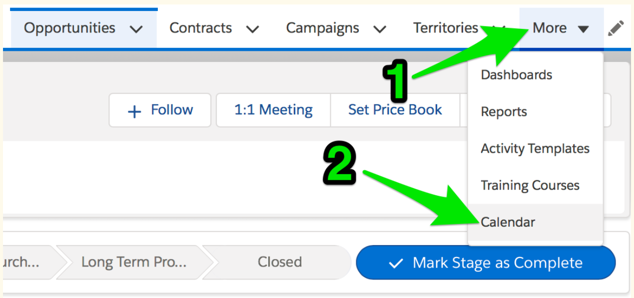
To schedule a one on one meeting meeting

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

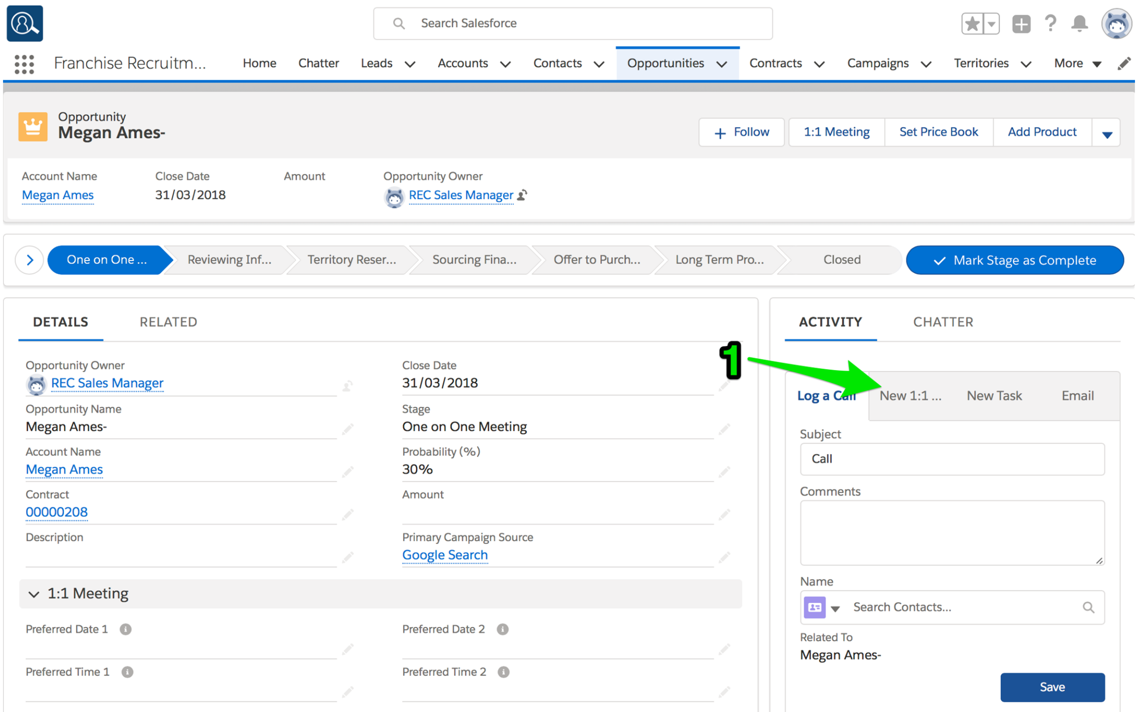


2. Make contact with the person and agree on the meeting details.

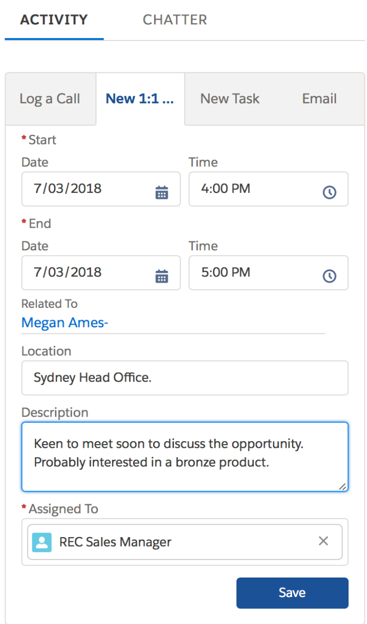
> It could be handy to open your calendar during any phone call.



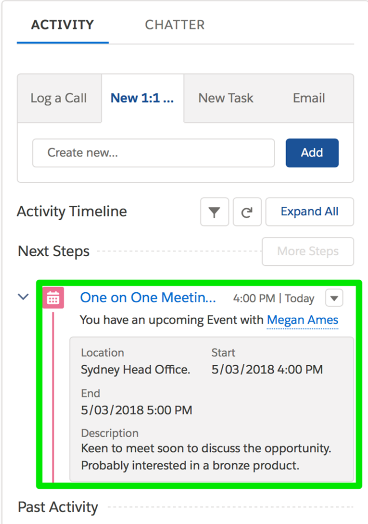
3. Record the agreed meeting time by selecting **New 1:1 Meeting**.



4. Record the meeting details.



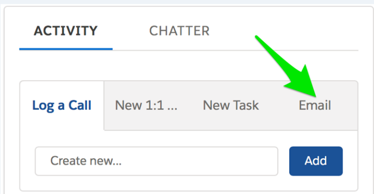
5. Press **Save**.



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

Create reminders for any preparatory tasks you need to do before the meeting using the **New Task** tab.

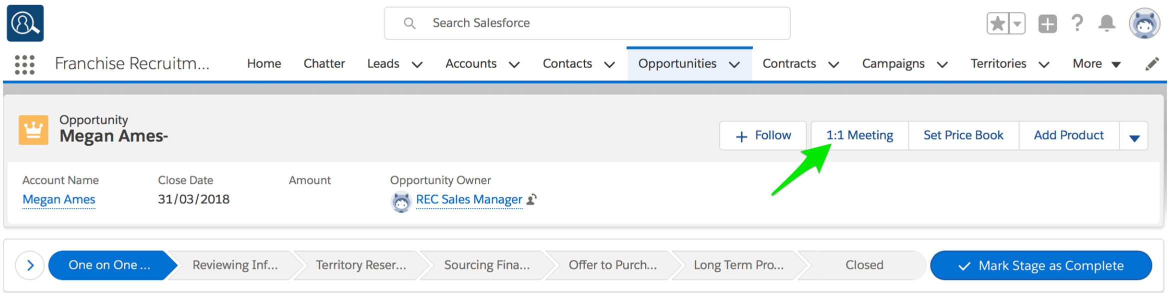
Consider sending an email to confirm the time and place using the **Email** activity.



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**.



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)

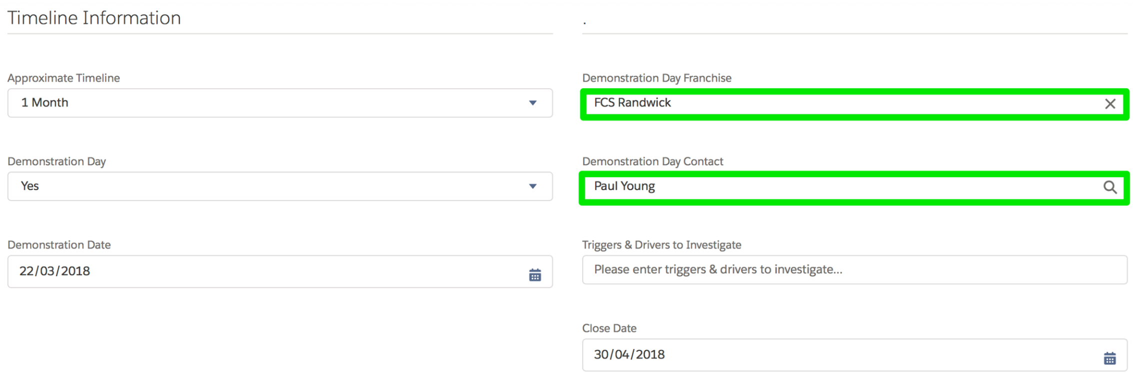
When you complete and save the One on One Meeting form, the data is recorded into the Account, Opportunity and Contract records related to this opportunity.

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.



These fields look up your franchisee information.

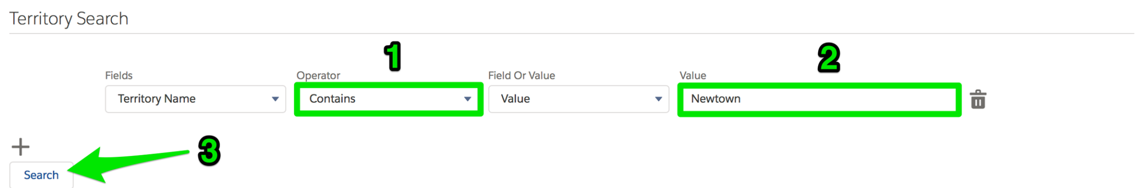
> After saving the One on One Meeting form, the agreed date, franchise and contact will be used by the Demonstration Day Referral Email. *See* "How to send automatic emails following the one on one meeting" on page 96.

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.

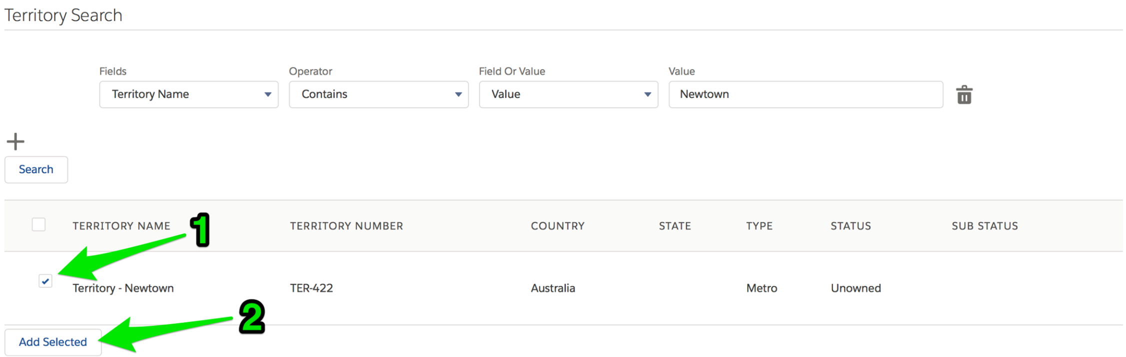
To find a specific territory

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

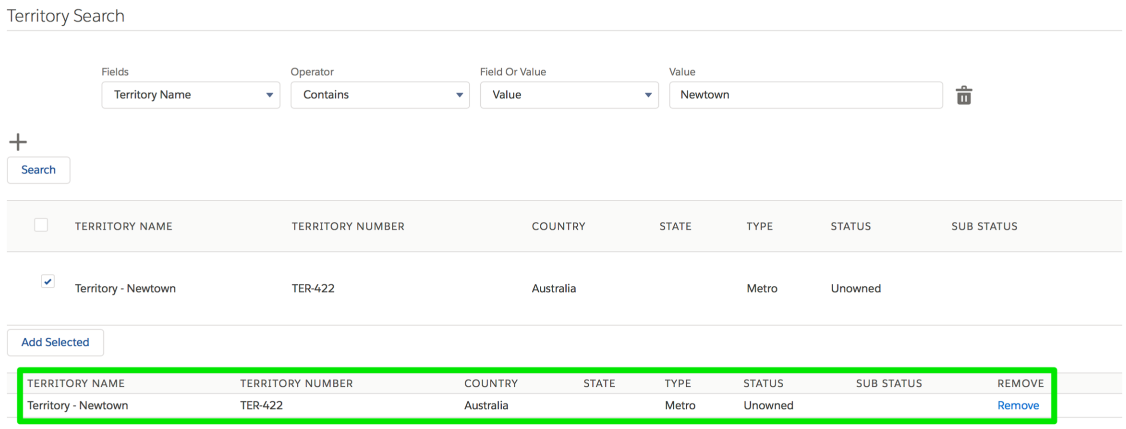


The list of territories matching your search criteria now appear.

4. Select the territory, then press **Add Selected**.



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

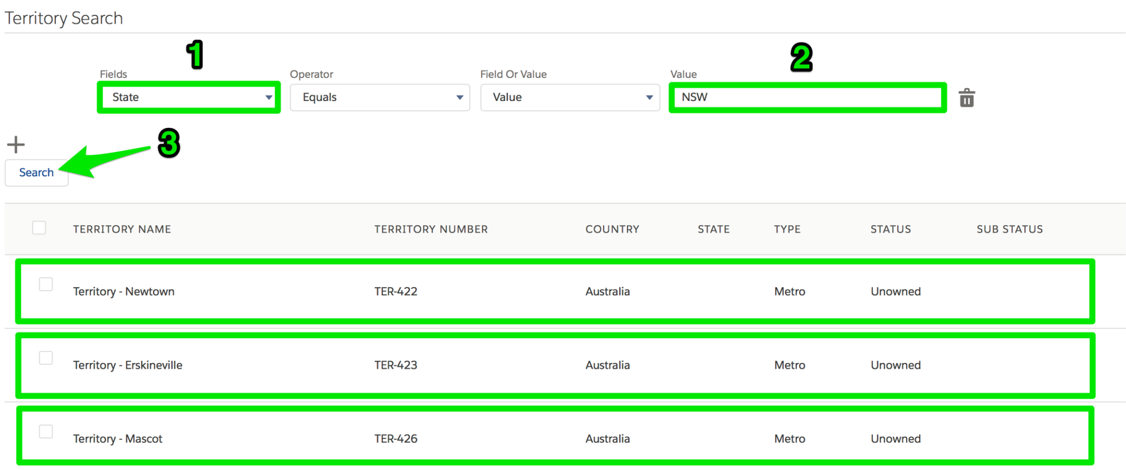


You can repeat this procedure to add more territories that have potential for sale to the prospect.

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**.

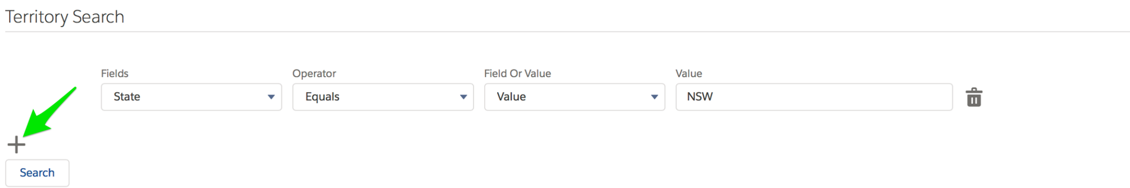


   You are shown a list of territories that match this search.

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

To find a range of territories using multiple criteria:

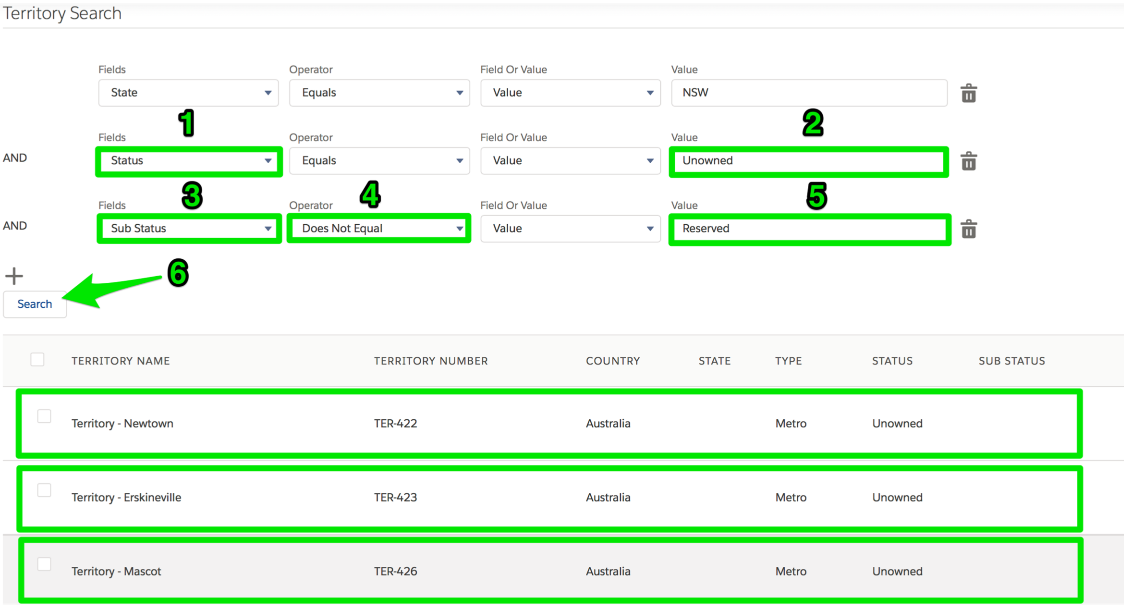
1. To add a further condition to the search results, press **Plus**.



   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.



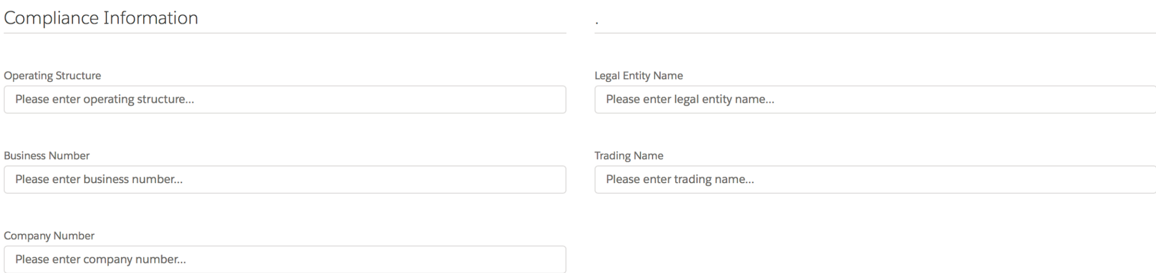
You now see a list of territories that correspond with each line of criteria.

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.



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.

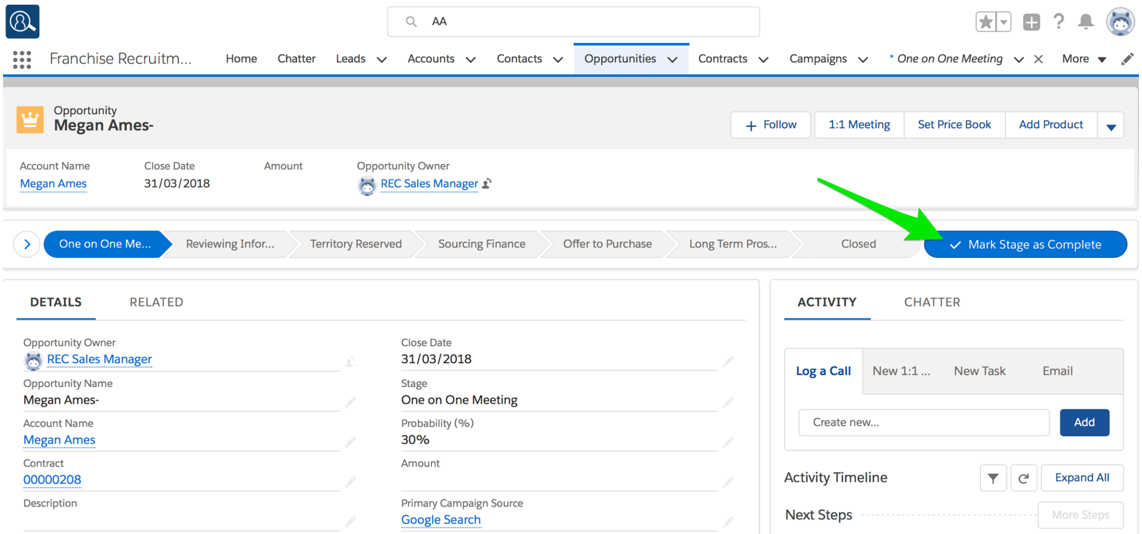
The One on One Meeting page disappears and the updated Opportunity appears.

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.

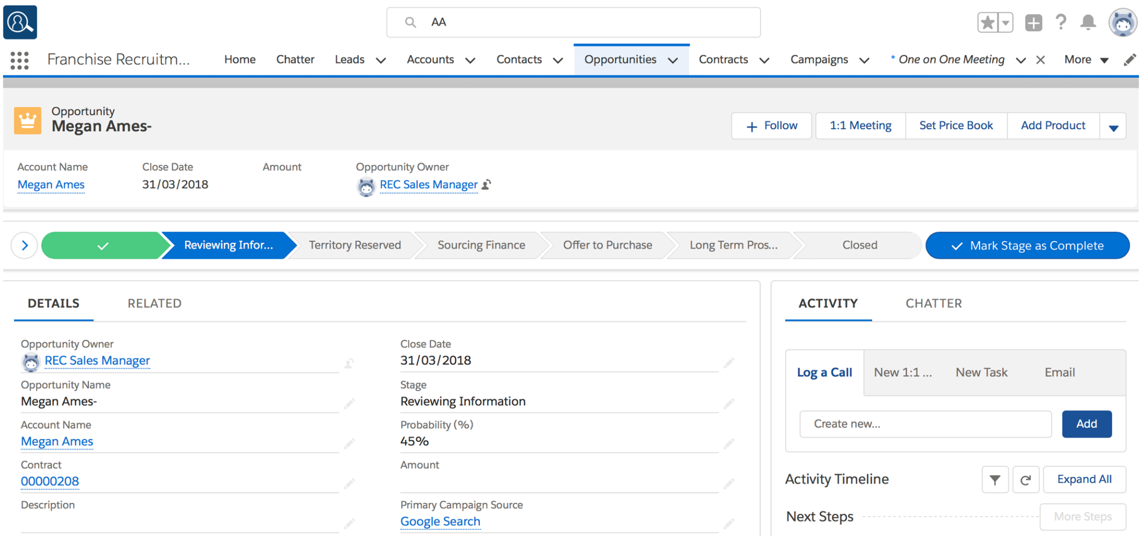
Now advance the stage

You have now completed the One on One Meeting stage.

» Press **Mark Stage as Complete**.



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

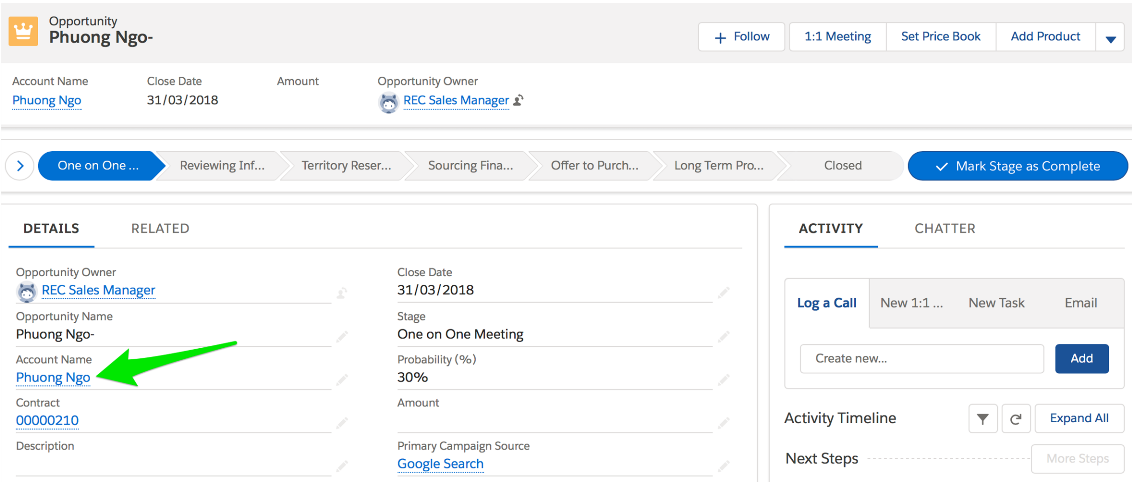


How to re-assign ownership of an opportunity

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

To re-assign ownership of an opportunity

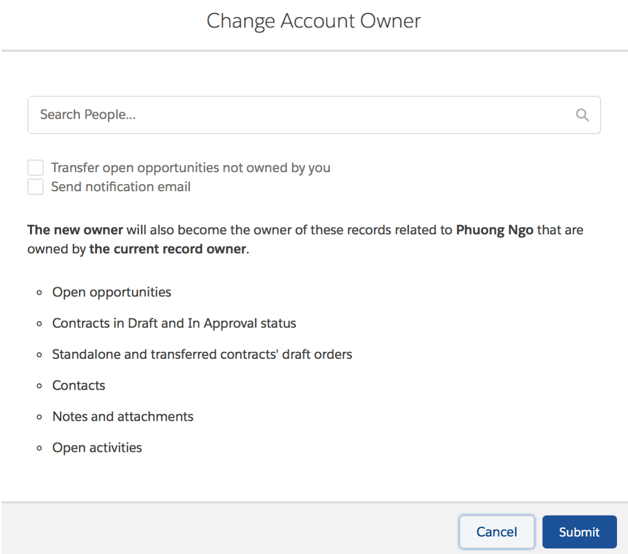
1. From the **Opportunity**, click the **Account Name** link.



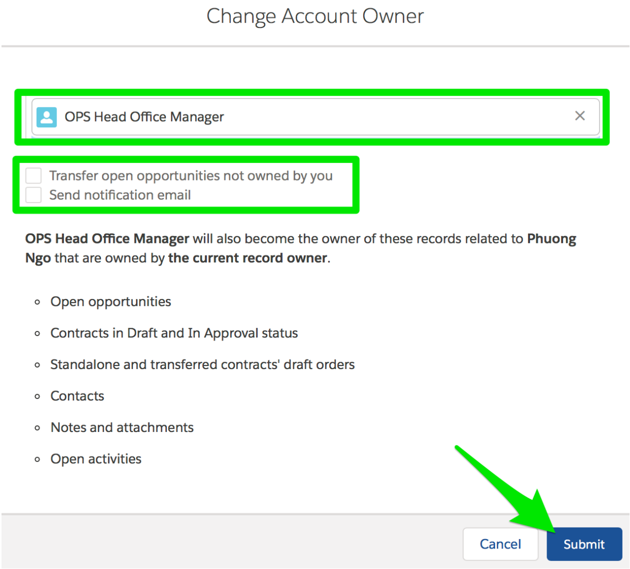
The **Account** page appears.

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

The Change Account Owner dialog box appears.



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

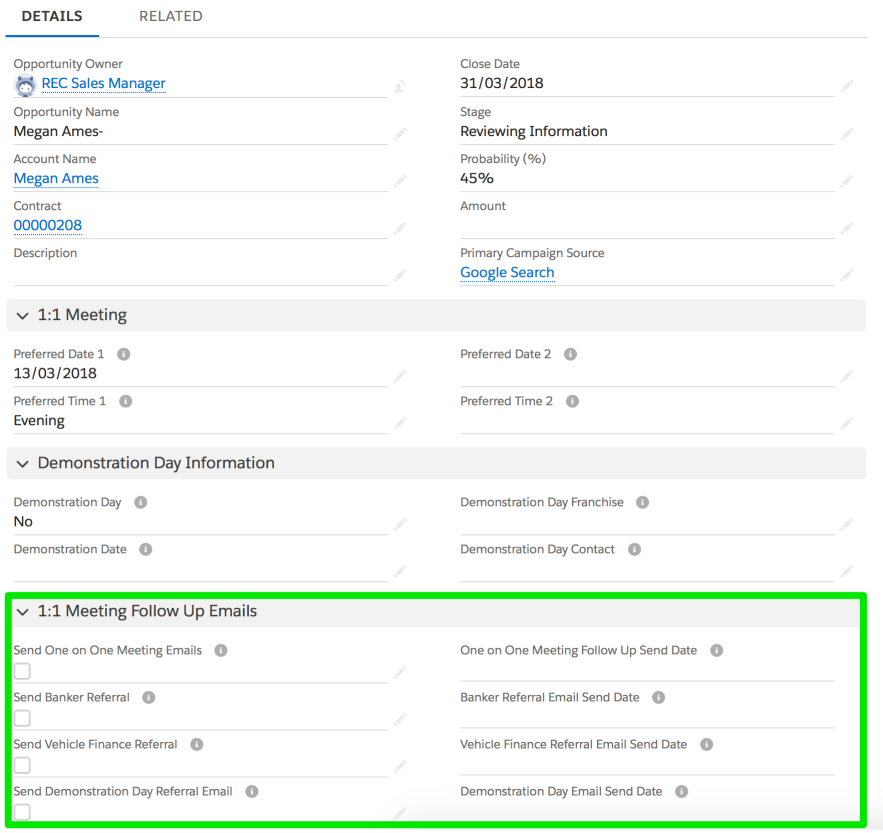
On installation Franchise Recruitment consultants created custom email templates to help streamline your work after conducting a one on one meeting.

> 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

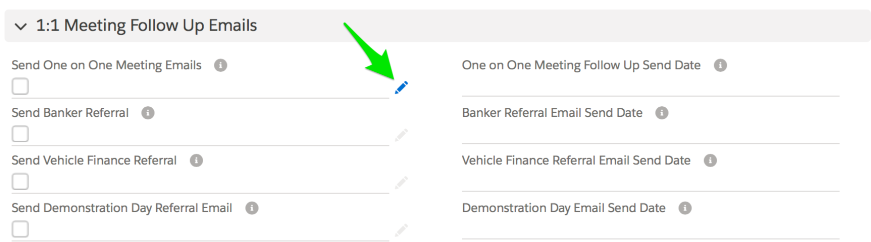
1. From the **Opportunity Details** page, scroll down to the **1:1 Meeting Follow Up Emails**.



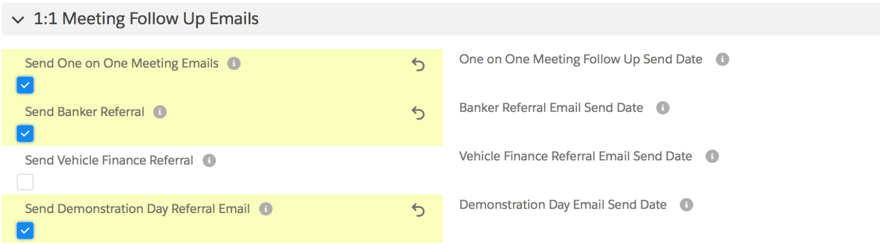
If you are going to send any of these emails, the first email must be selected. The banker, vehicle finance and demonstrate day emails are all optional, and all require the first email to be checked.

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.

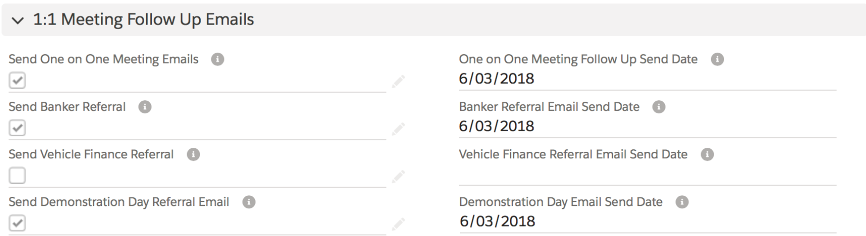


3. Select each email as needed.



4. Press **Save**.

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



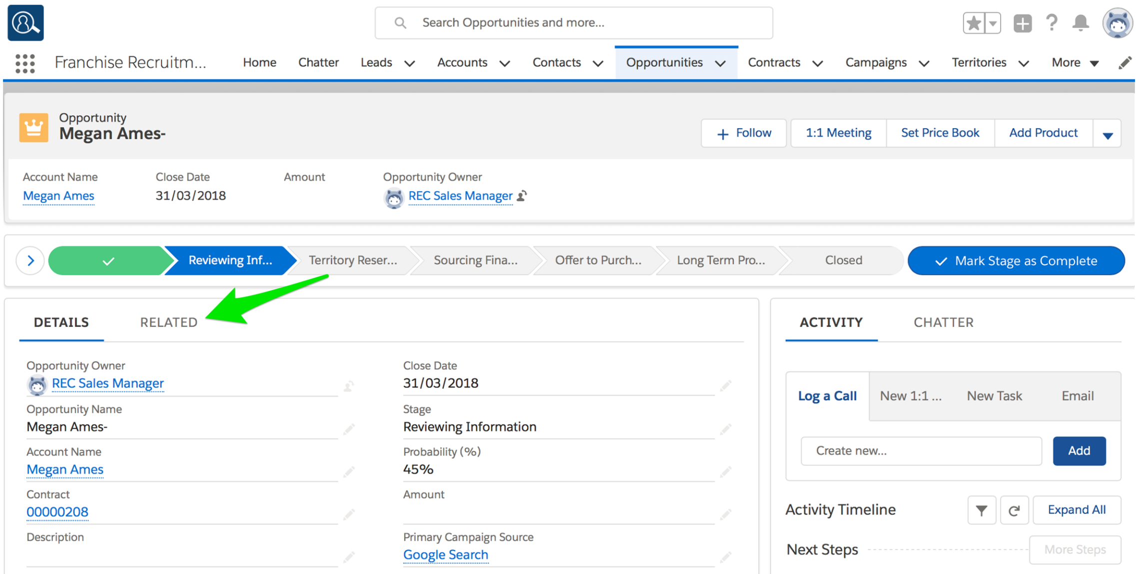
You see whether One on One Meeting follow up emails have been sent by examining the **Send Date** fields. They are not recorded in Activity History.

How to update territories of interest

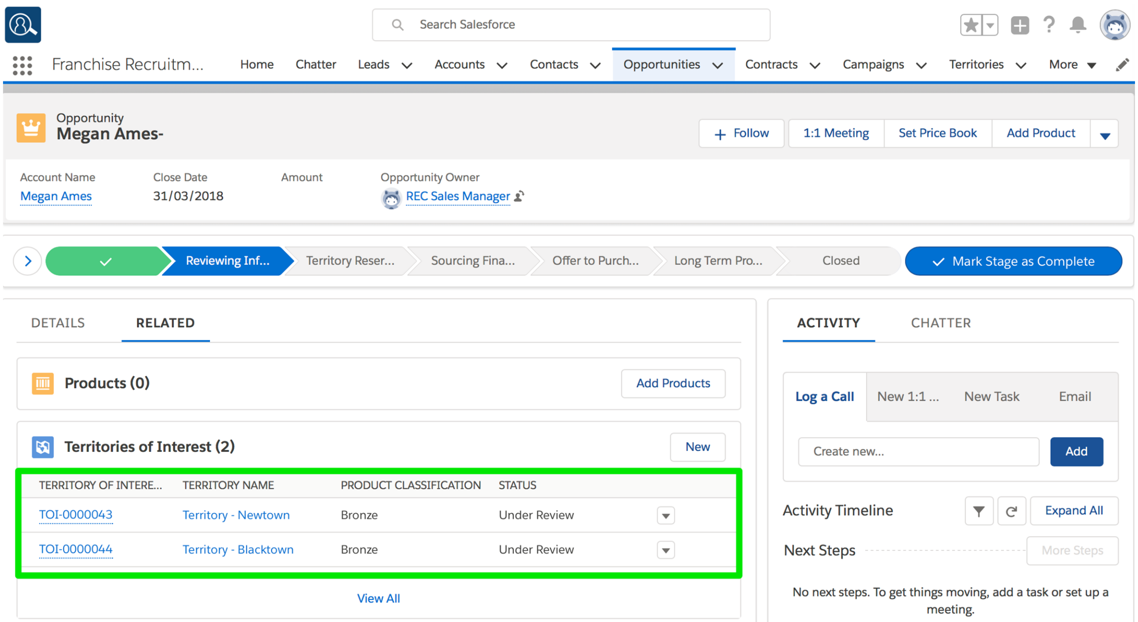
As you work through the process of identifying the final Territory to be sold, update any Territories that are now deemed unsuitable.

To exclude Territories of Interest

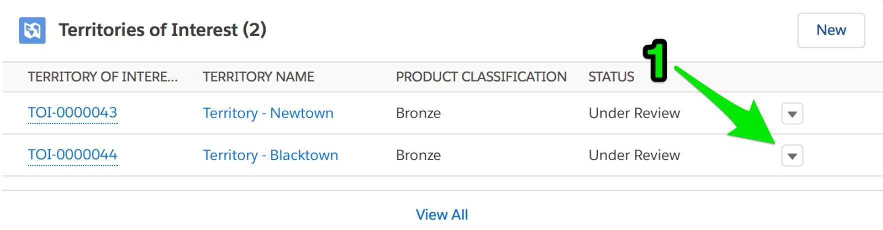
1. From the **Opportunity** record, select the **Related** tab.

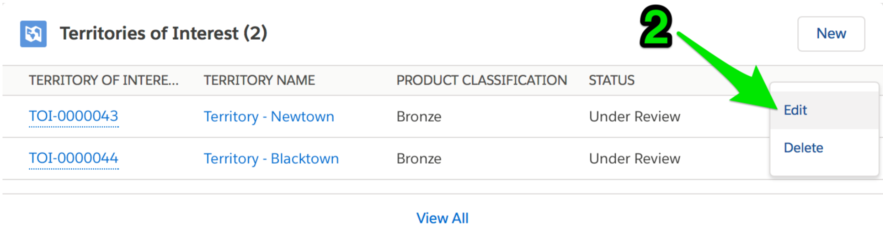


You see the list of current **Territories of Interest**.



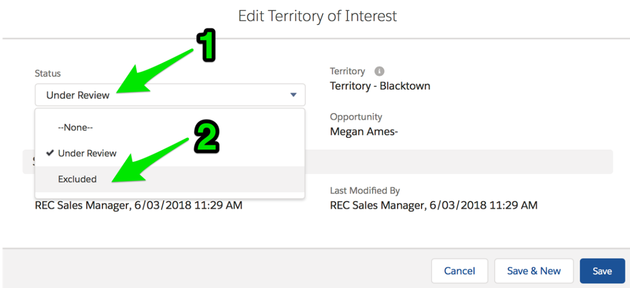
2. From each territory's **More Actions** menu, select **Edit**.



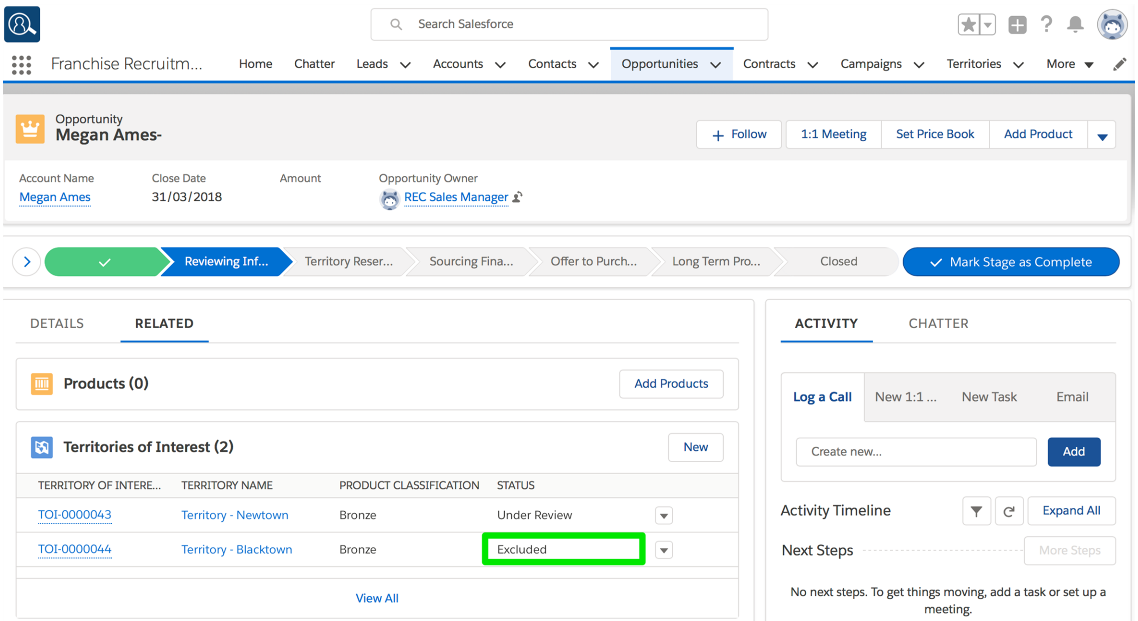


The **Edit Territory of Interest** dialog box appears.

3. Change the `Status` to *`Excluded`*.



4. Press **Save**.



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

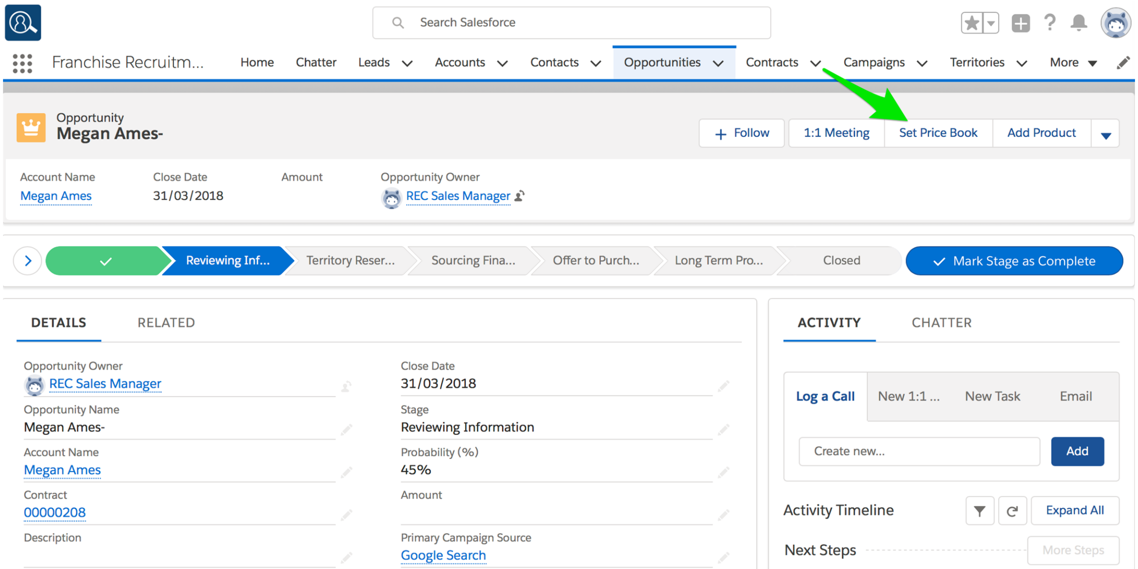
> Products are defined through a combination of a Product class, Territory and Price. Product classes are a way to segment the value of territories, allowing you to set higher prices for more productive territories. Territories are classified by product class. Once you add a product to an opportunity 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.

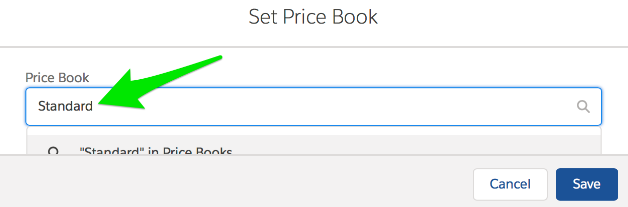
To set a Price Book

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

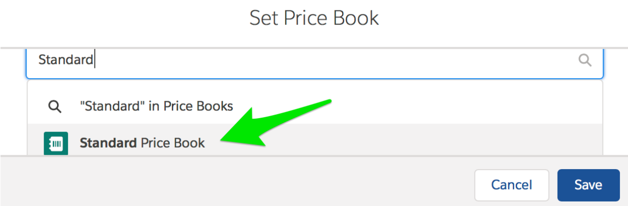


The **Set Price Book** dialog box appears.

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



3. Select the price book from the list.



4. Press **Save**.

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

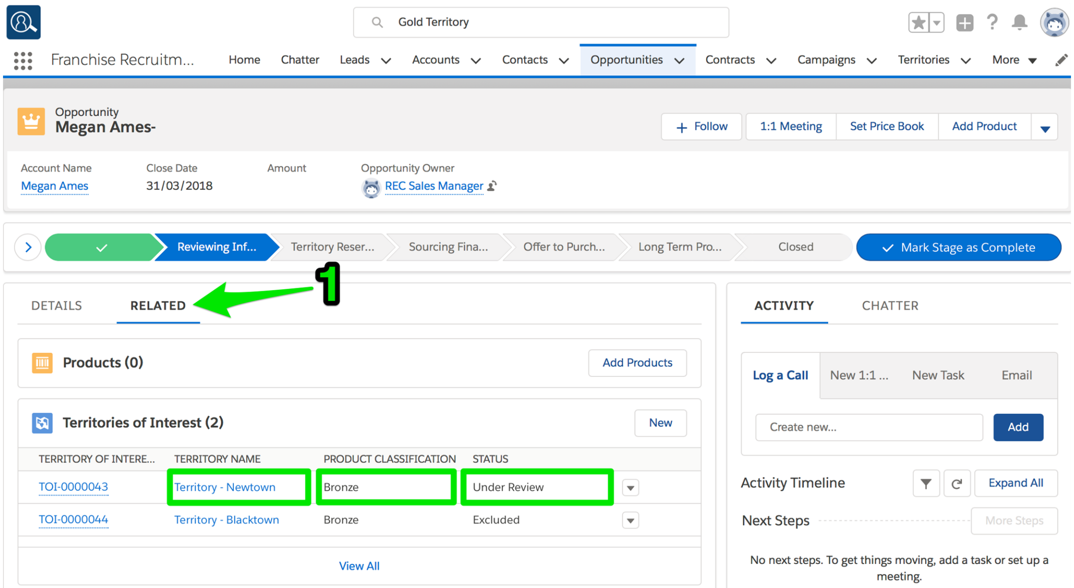
How to add a product to the opportunity

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

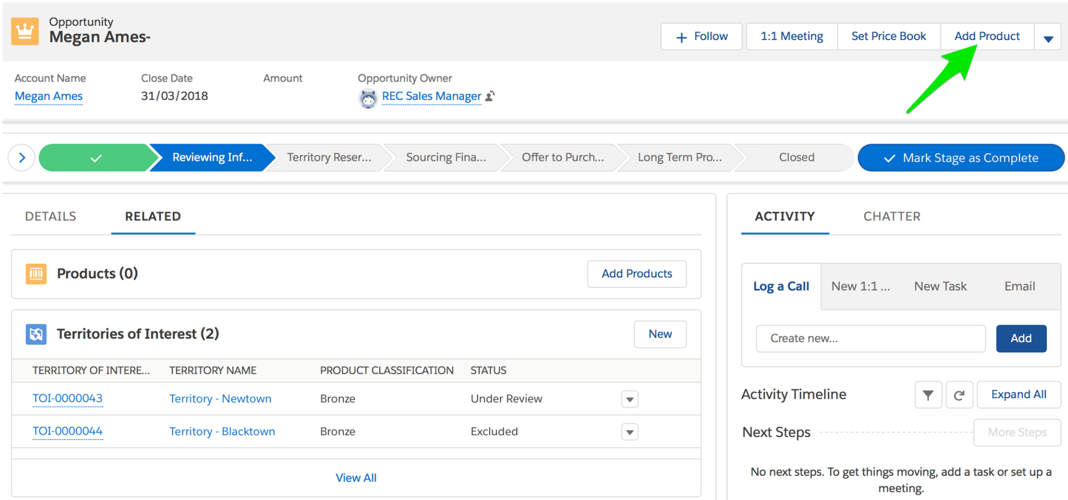
Product classes are a way to segment the value of territories allowing you to set higher prices for more productive territories. You may only add territories belonging to the selected product class. The price book will set a default price for the given territory but you can override the default price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

How to add the Product

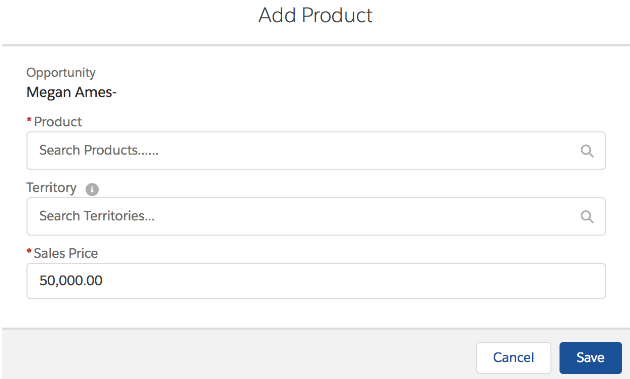
1. From **Opportunity Related** tab, identify the last remaining territory that is `Under Review`, noting its `Territory Name` and `Product Classification`.



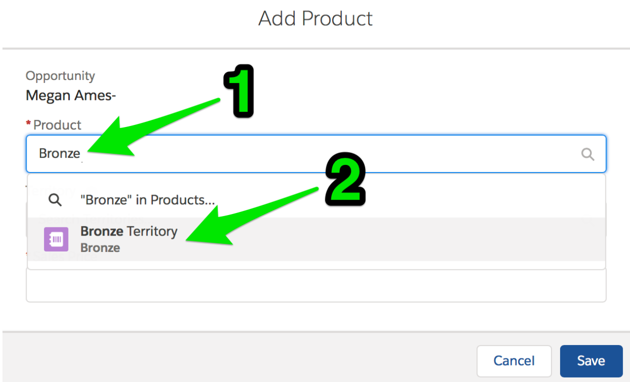
2. Choose **Add Product**.



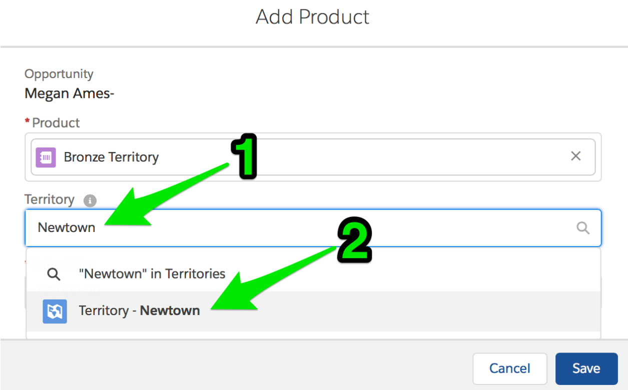
The **Add Product** dialog box appears.



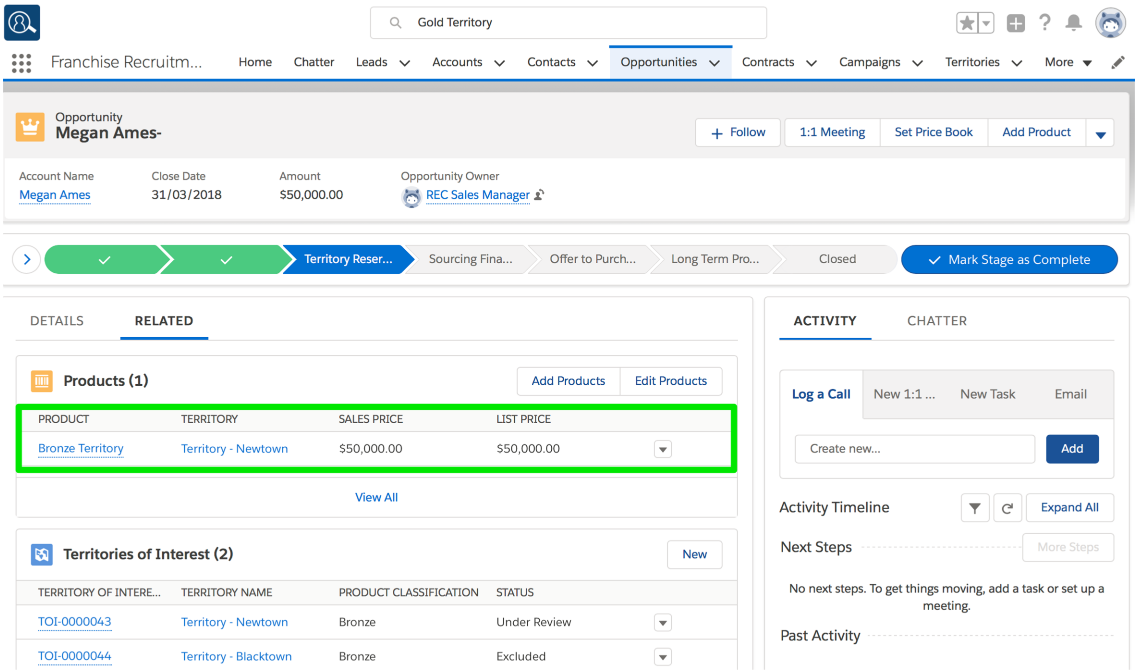
3. Begin searching for the `Product` class of the chosen territory.



4. Begin searching for the `Territory`.



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



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 *`Territory 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

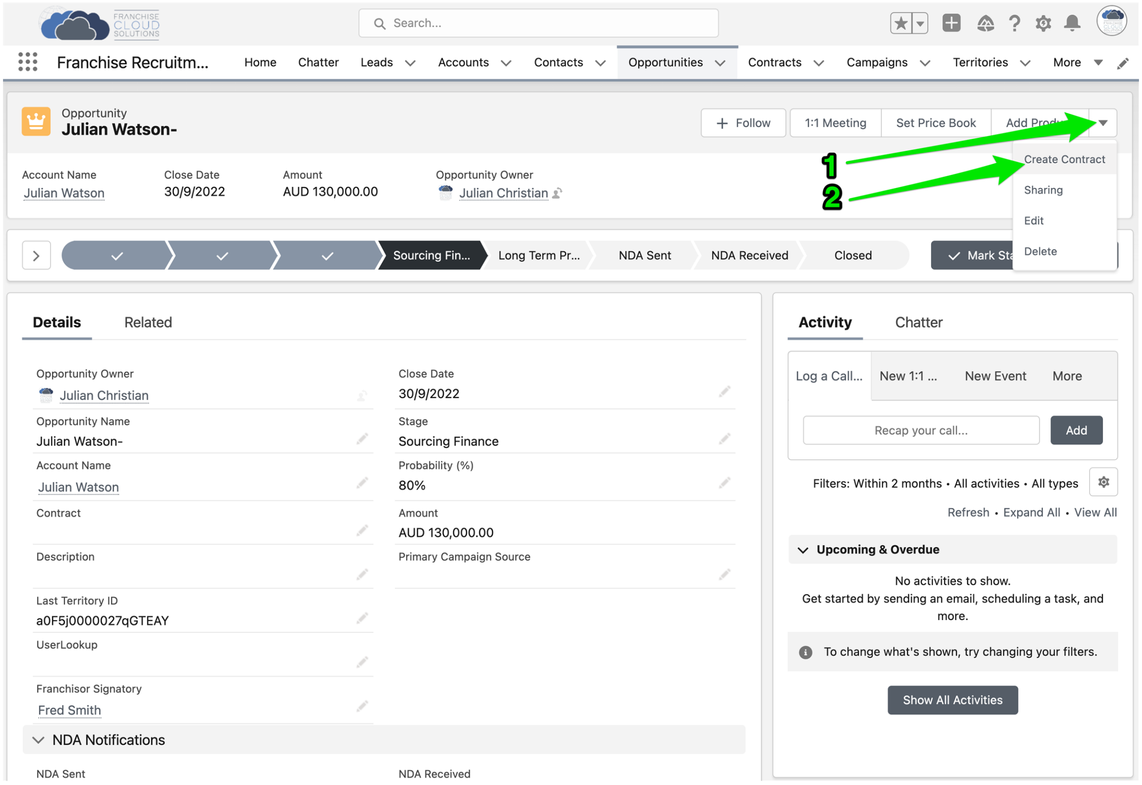
- From the **Opportunity**, press **Mark Stage as Complete**.
  The Opportunity is advanced to the next stage.

Offer to purchase stage

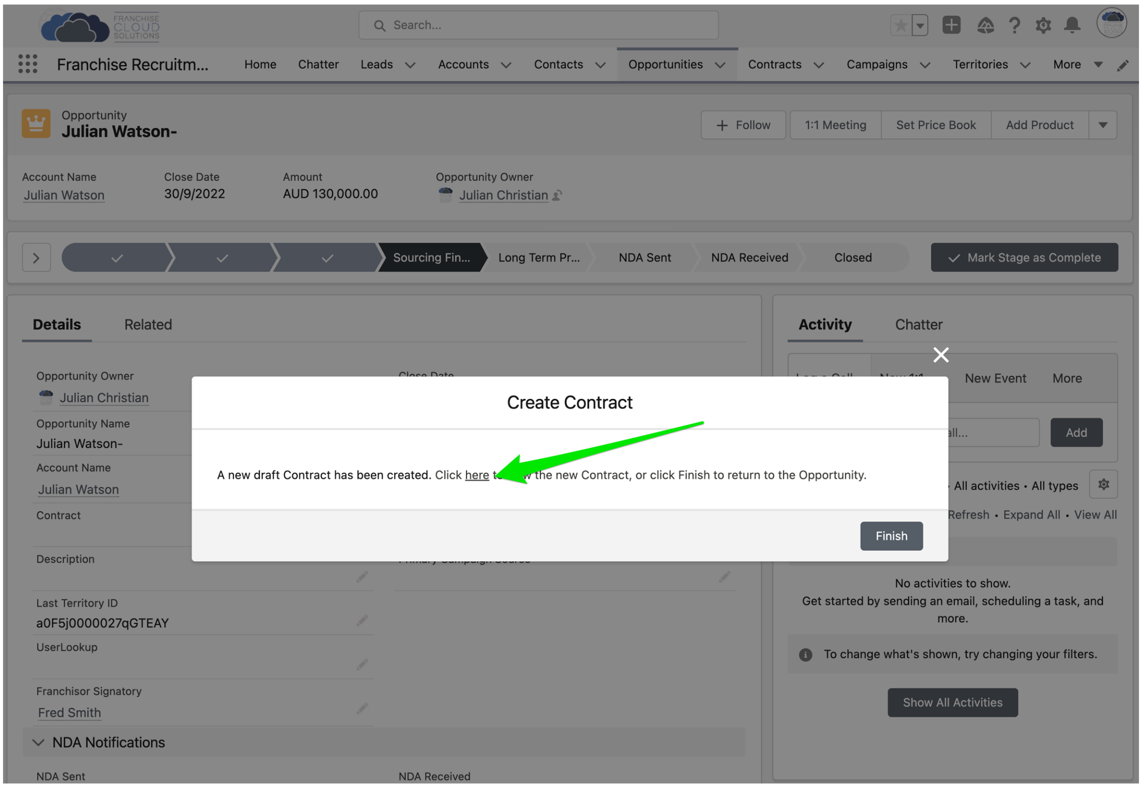
The Offer to Purchase stage is where the prospect has made an offer to purchase the franchise product. The key focus in this stage moves from the Opportunity to the Contract.

To create the Contract

» Select the **Create Contract** button



» Now click the link to go to the new Contract



Closing the opportunity stage

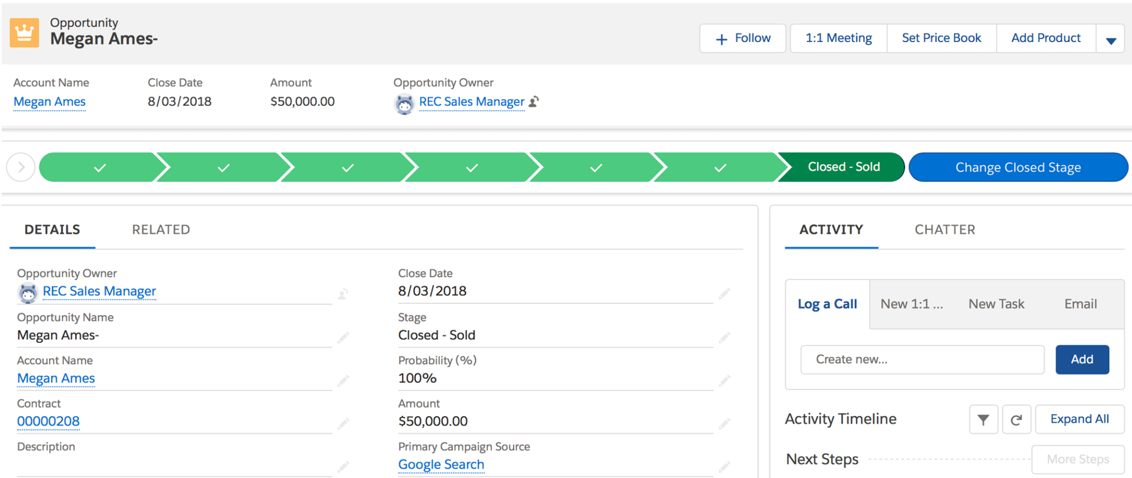
Once the Franchise Agreement and required disclosure documents have been signed and returned by the prospect, update the Opportunity to `Closed – Sold`.

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 Prospect`stage. 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.



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.

CHAPTER 5

Working with Contracts

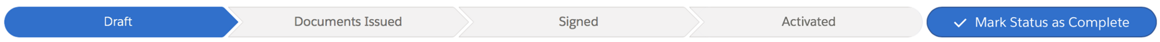
Introducing contracts

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.

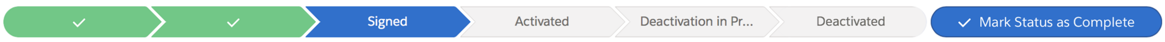
Contract statuses

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.



Two more statuses become available after signing.



Here is a summary of each contract status.

Draft

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

Documents issued

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

Signed

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

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

Activated

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

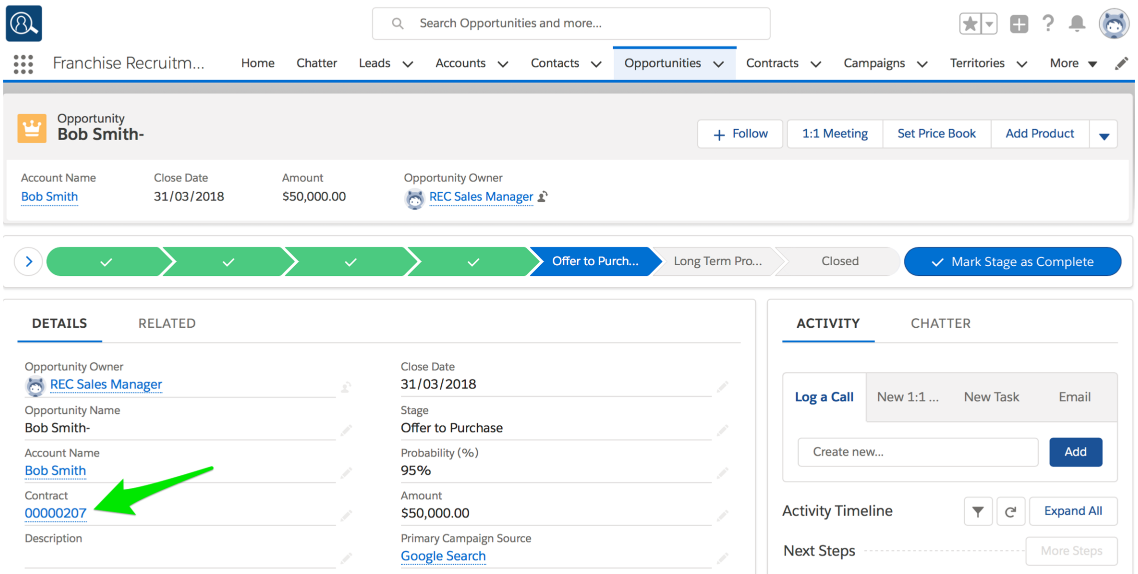
How to draft a contract

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.

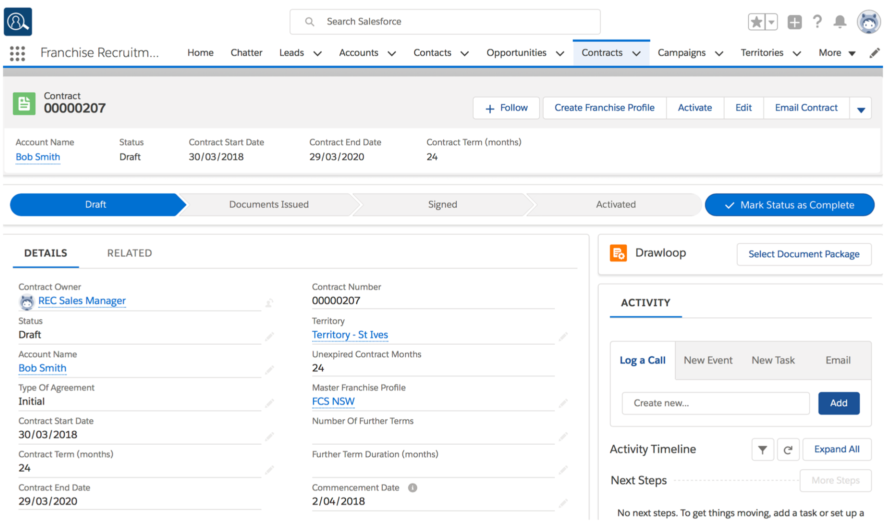
> When a Lead is converted to an Opportunity a Contract record is generated. During the one on one meeting you recorded information into the Contract record. The `Territory` and `Master Franchise Profile` fields are populated and the `Product` is added to the **Opportunity**.

To enter the contract details

1. From the **Opportunity**, click the **Contract** link.



You now see **Contract Details**.



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**, **Description Information** and **System Information**.

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

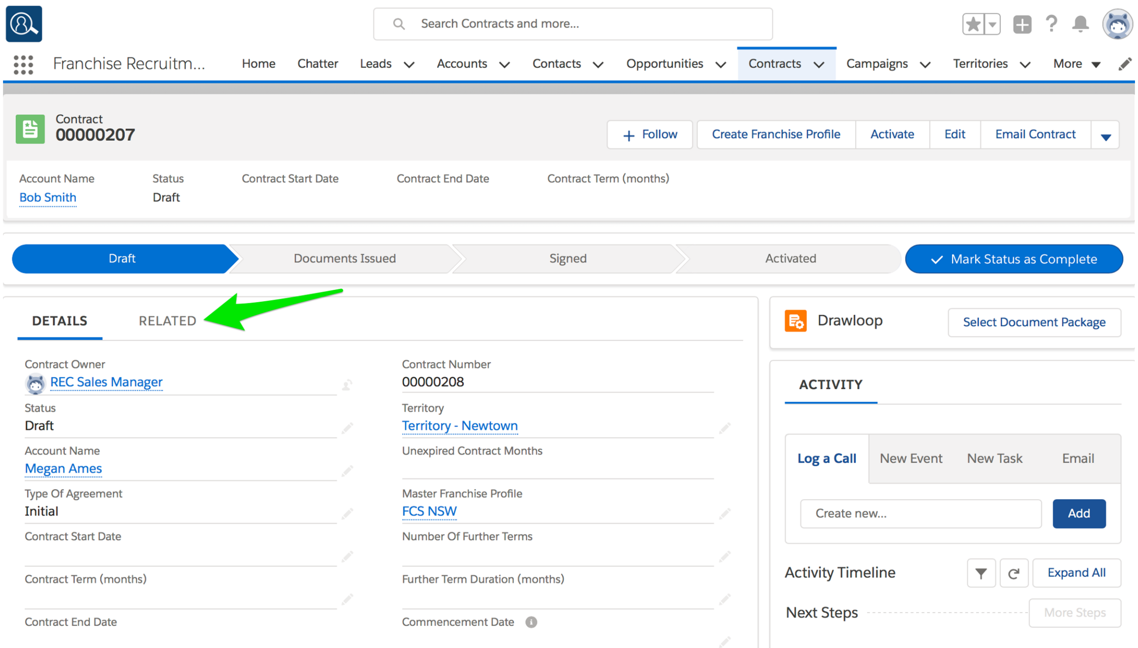
How to add signatories

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.

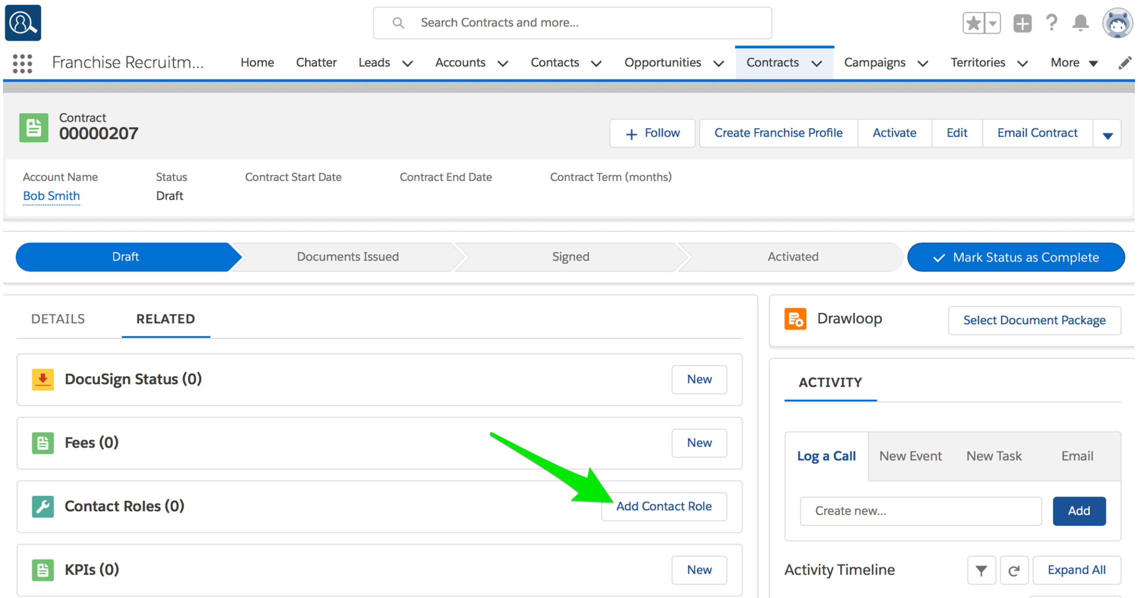
> When your contract documents are configured for it, the contacts you add to the contract will automatically appear within the generated contract documents.

To add a contact to the contract

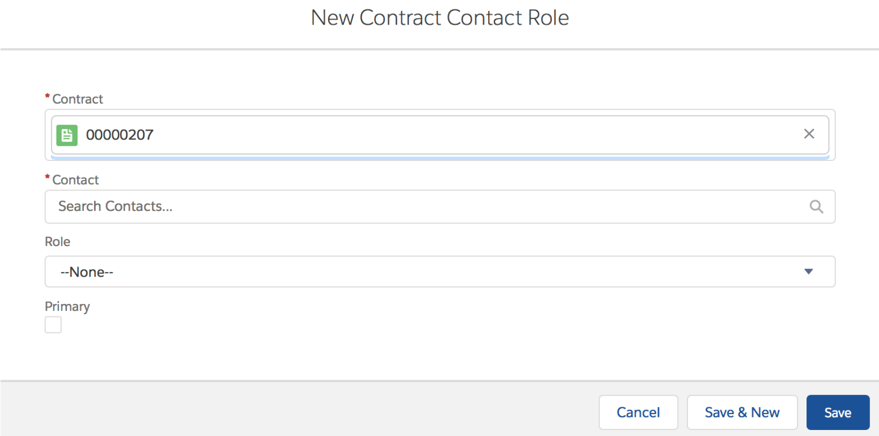
1. From the **Contract**, select the **Related** tab.



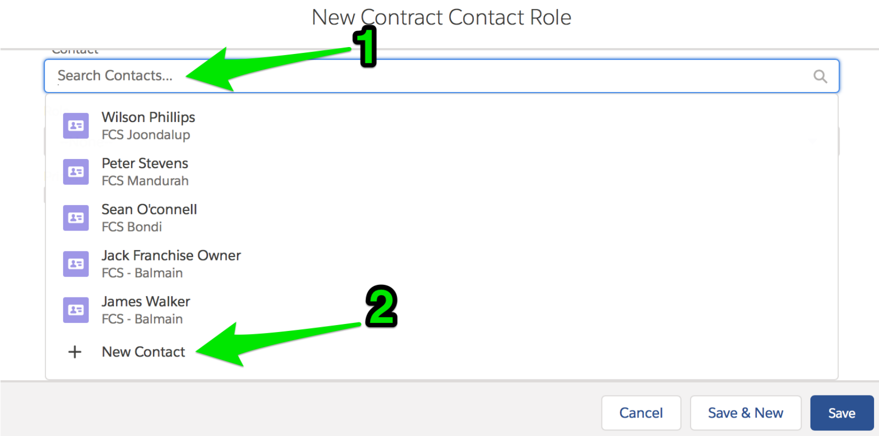
2. From the **Contact Roles** section, press **Add Contact Role**.



3. The **New Contract Contact Role** dialog box appears.

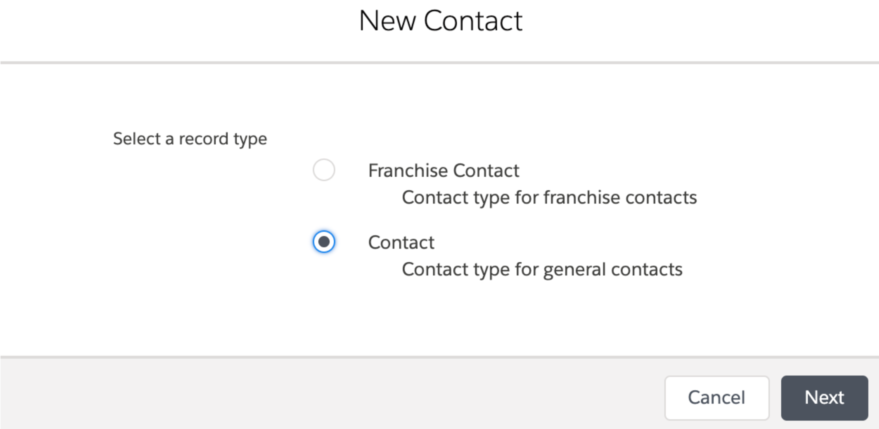


4. Click in the `Contact` field and scroll down until you can see *`New Contact`*. Select *`New Contact`*.



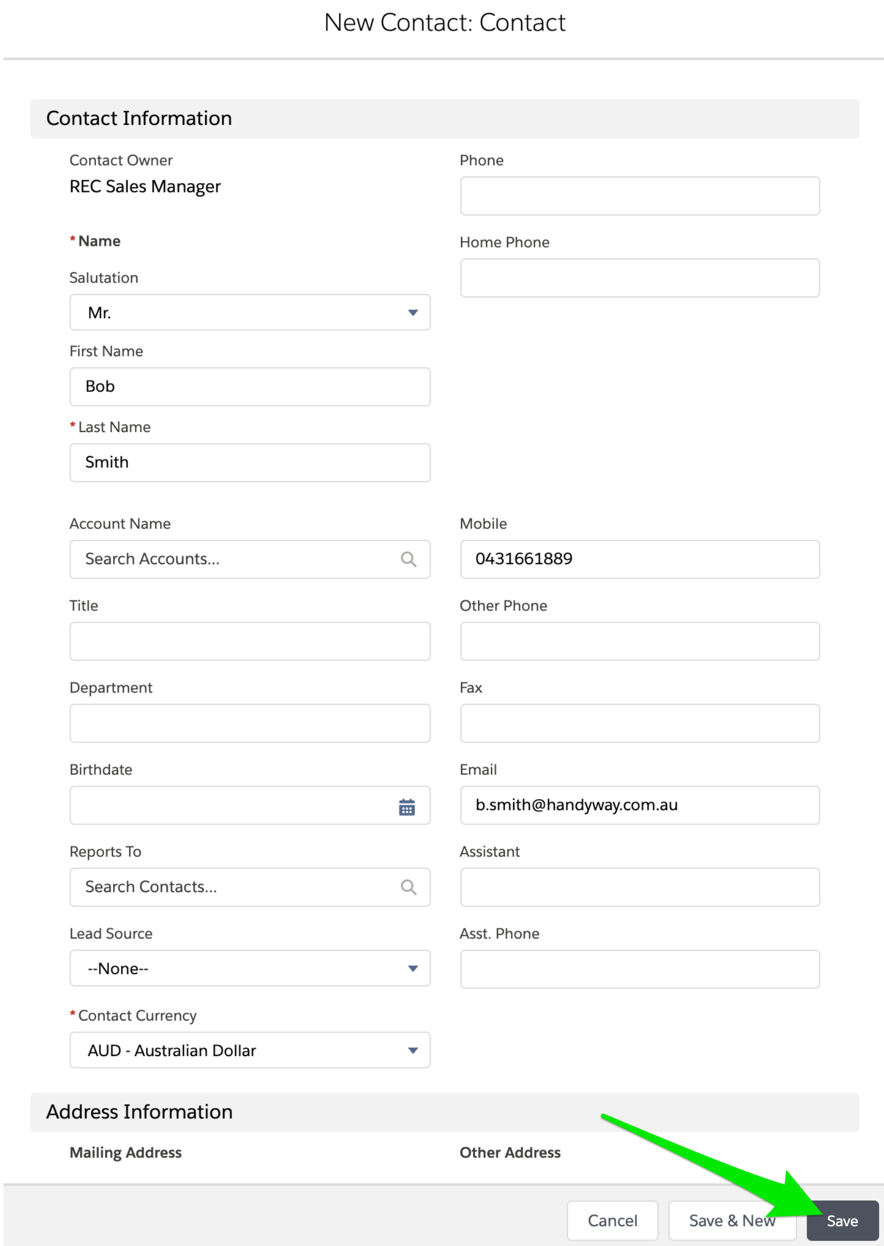
The **New Contact** dialog box appears.

5. Select `Contact` and press the **Next** button.

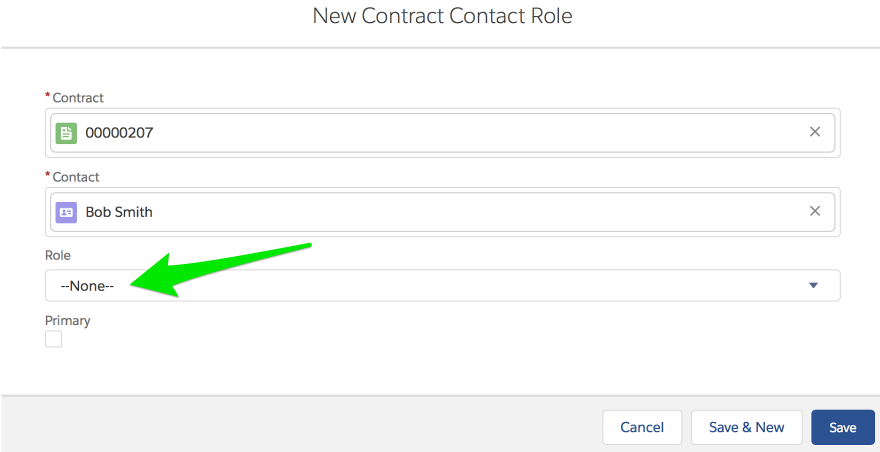


The **New Contact: Contact** dialog box appears.

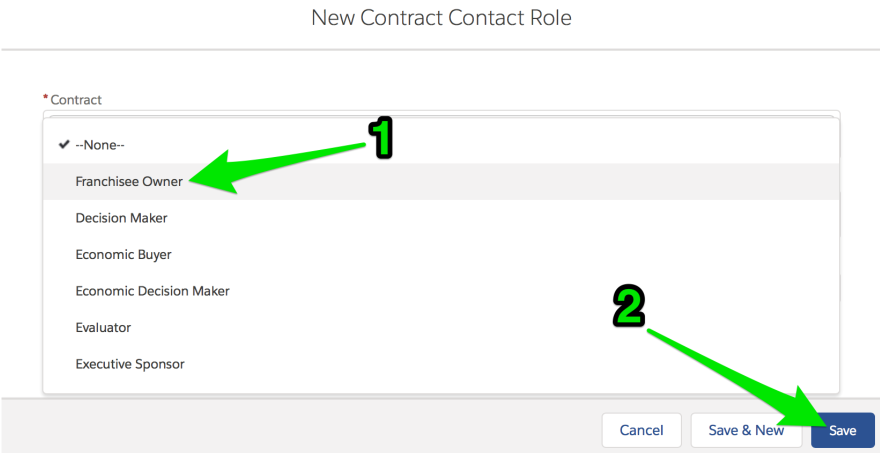
6. Enter the **Contact** details then press **Save**.



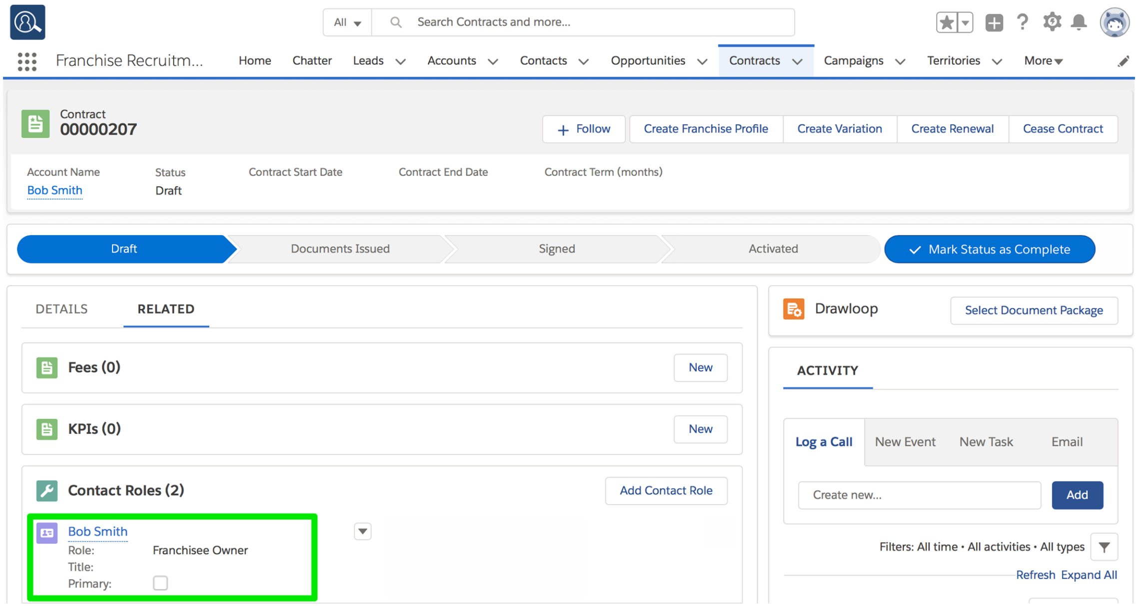
7. Select the `Role` list.



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



9. The new role is added to the **Contract**.



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

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

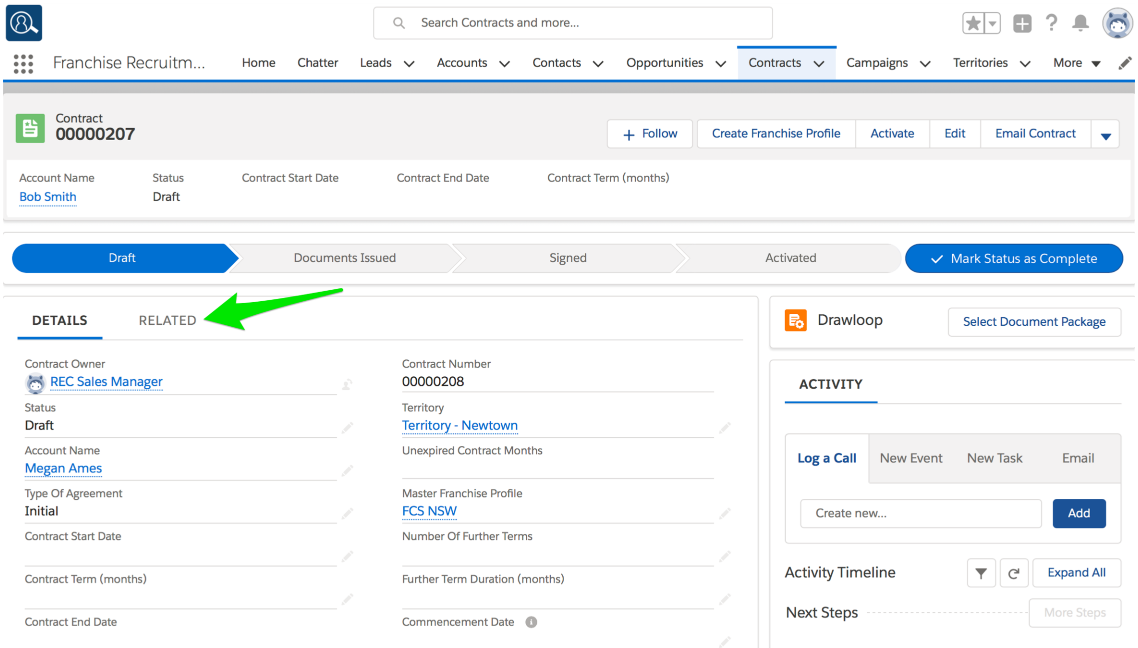
How to insert a custom fee schedule

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

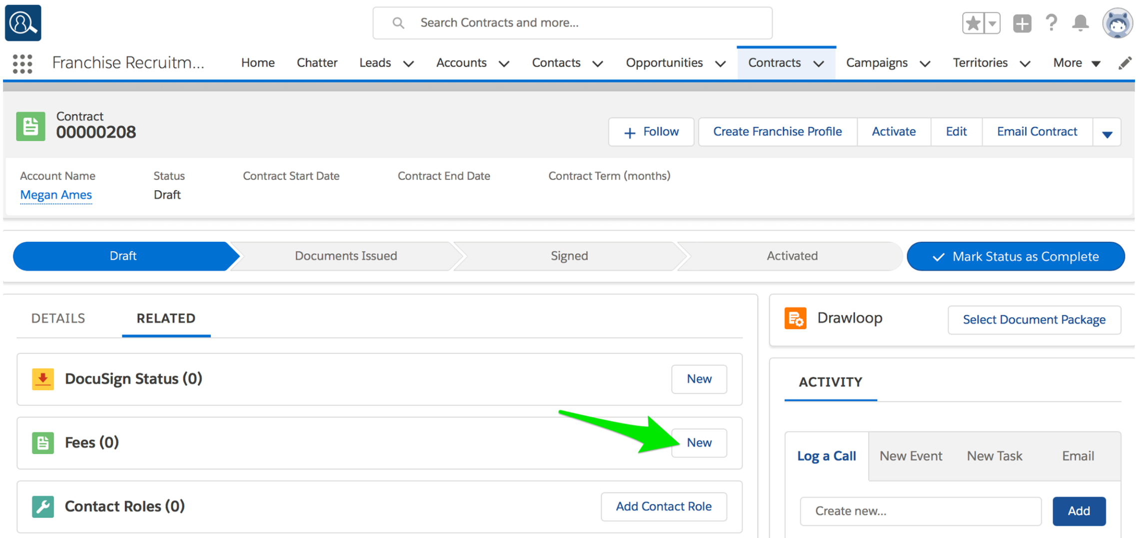
- A once-off or recurring fee sequence
- Fixed fees
- Royalties

To add a custom fee

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



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



   The **New Fee** dialog box appears.

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

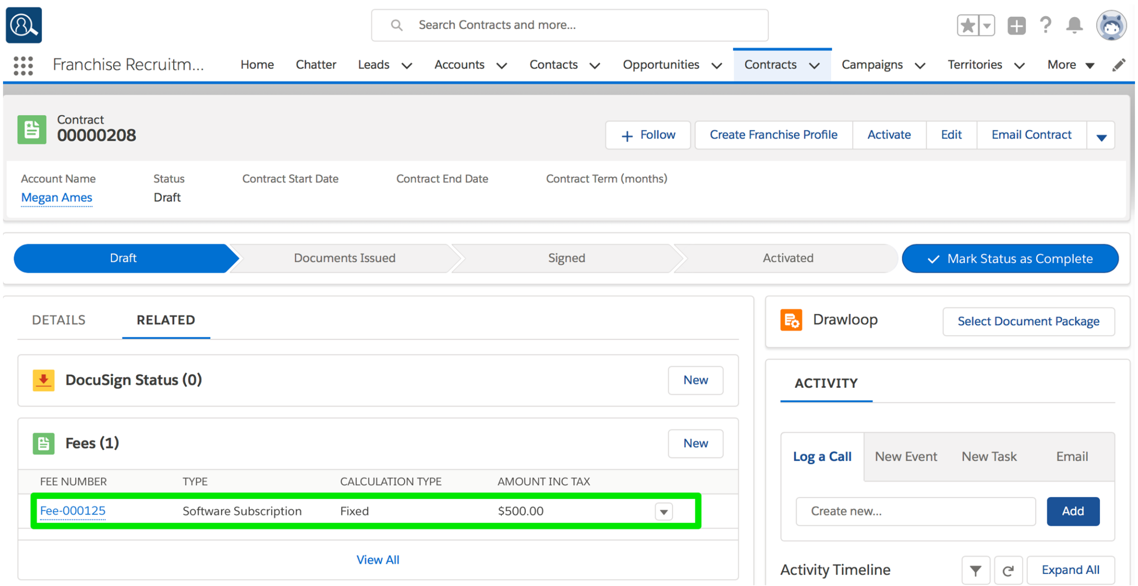
   » *See* "To add a once-off or recurring fee sequence" on the next page

   » *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.



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`*.

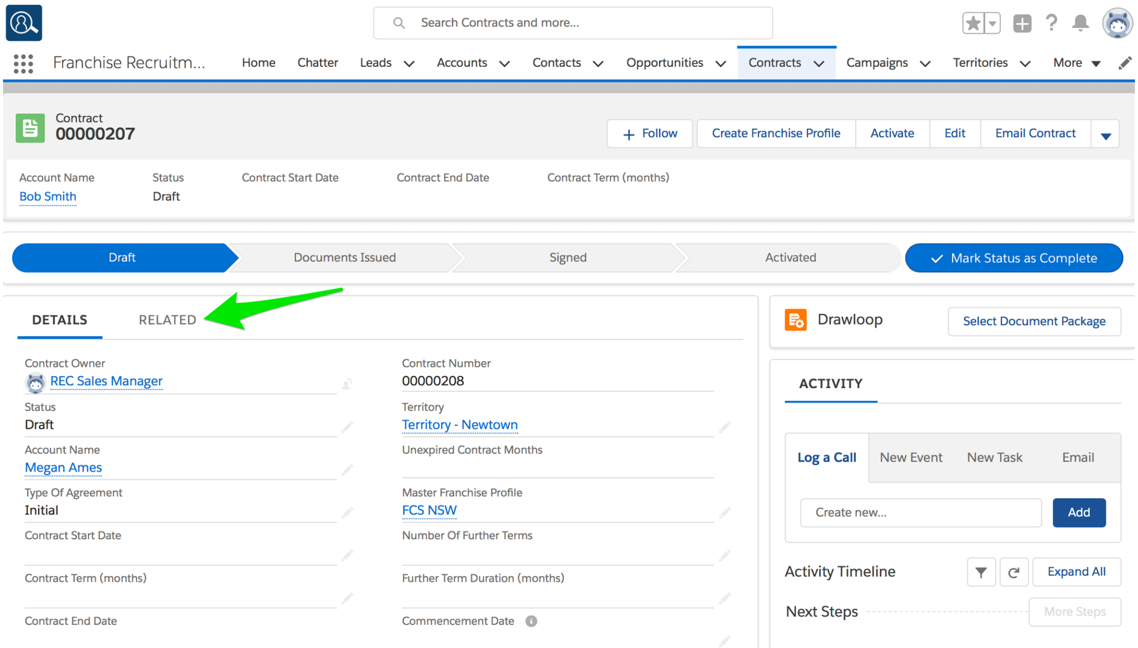
How to specify contract targets

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.

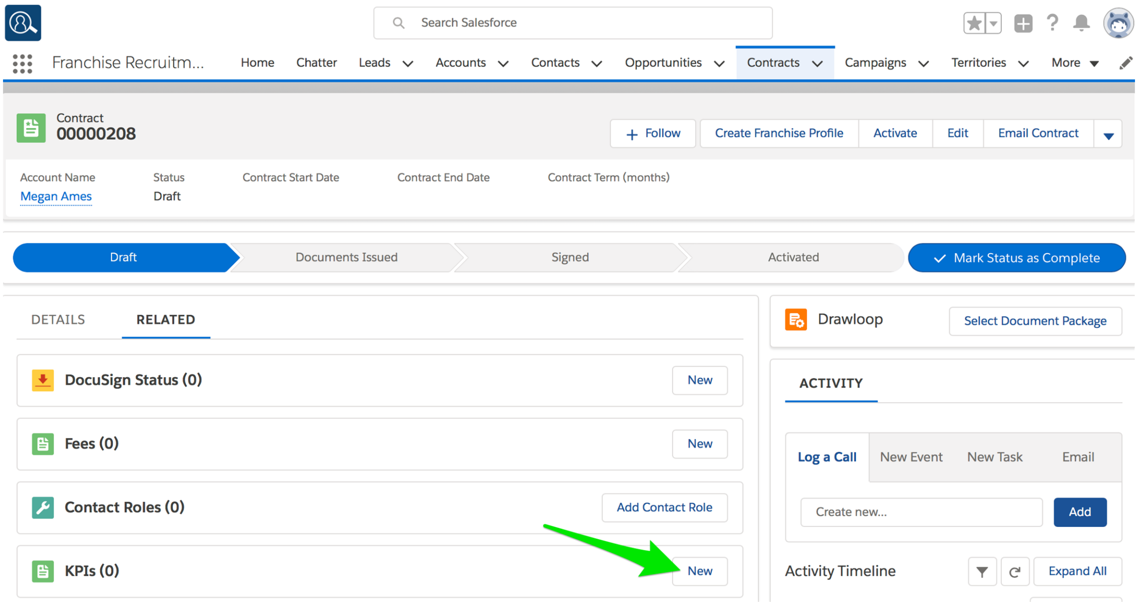
> A common franchise KPI target would be to require a certain volume of revenue within a certain time frame.

To add a custom KPI target

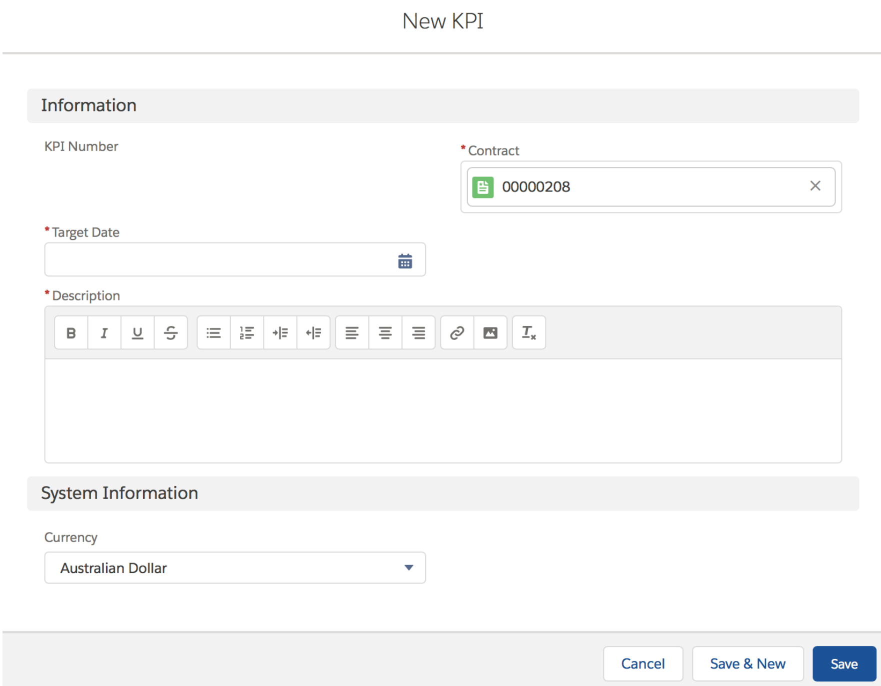
1. From the **Contract**, open the **Related** tab.



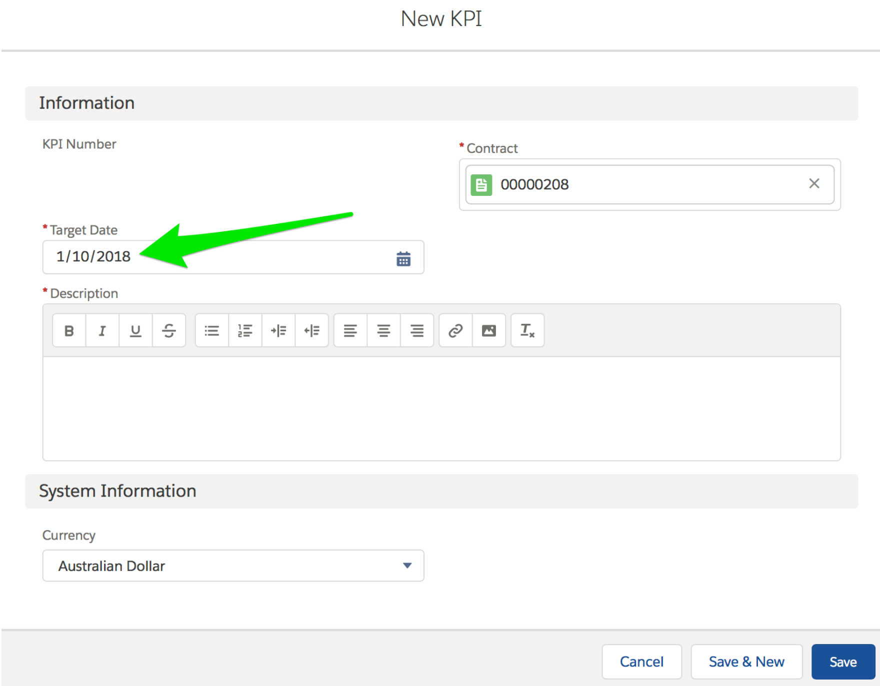
2. From the **KPIs** section, press **New**.



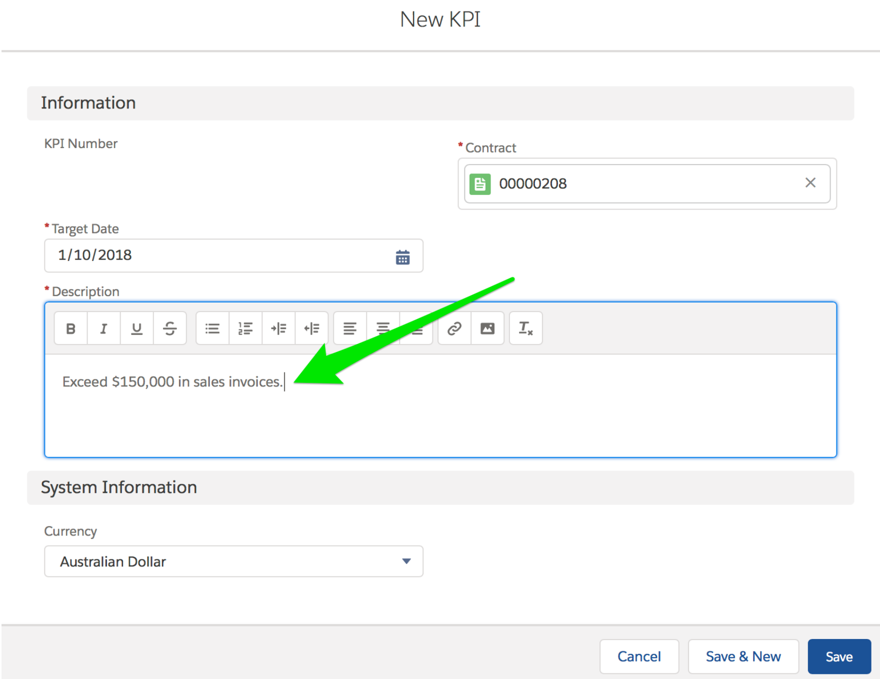
The **New KPI** dialog box appears.



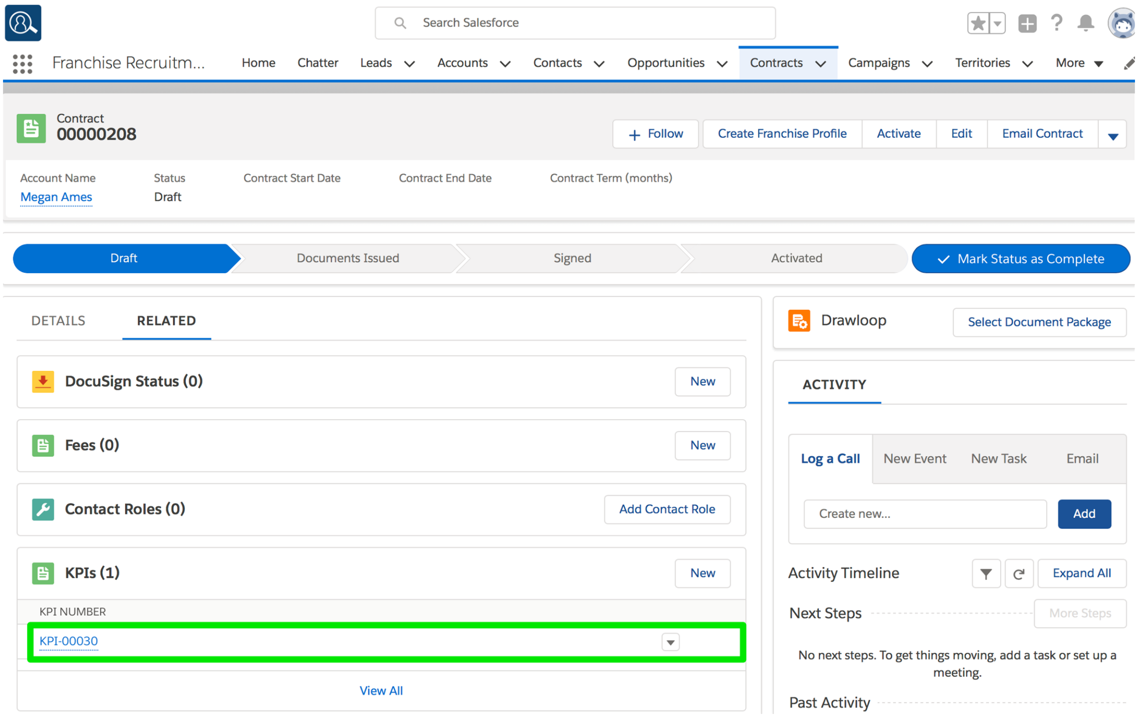
3. Enter a `Target Date` by which the KPI target should be achieved.



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



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



How to generate contract documents

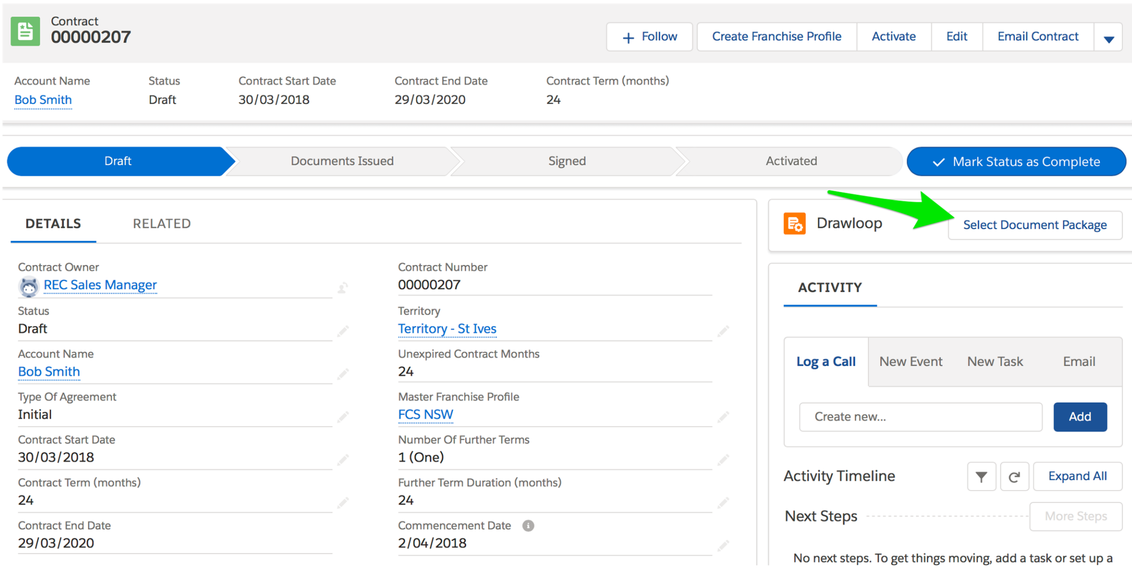
When you are satisfied that all relevant information has been entered on the **Contract** record, you can start the document generation.

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

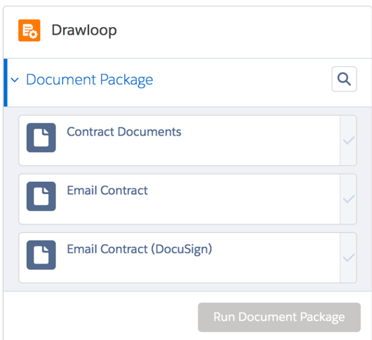
> You may have more than one document package available. Ensure you know which document package you need to use.

To start document generation

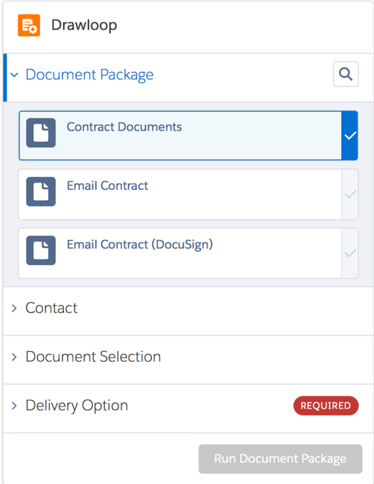
1. From the **Contract**, press **Select Document Package**.



One or more **Document Packages** appear.

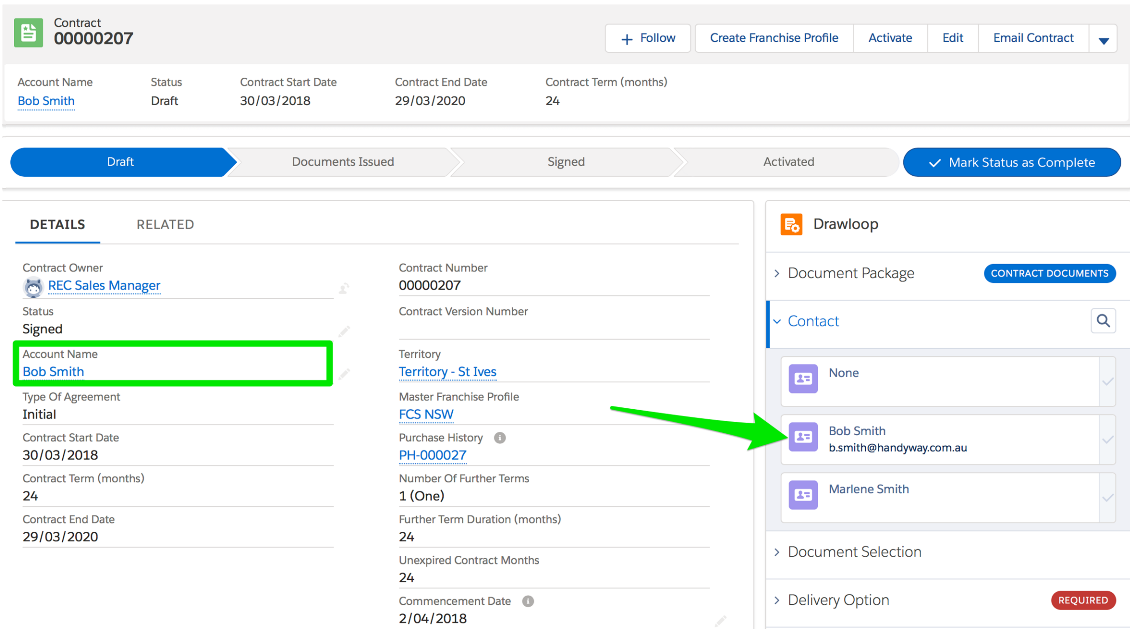


2. Select the **Document Package** you need to generate.

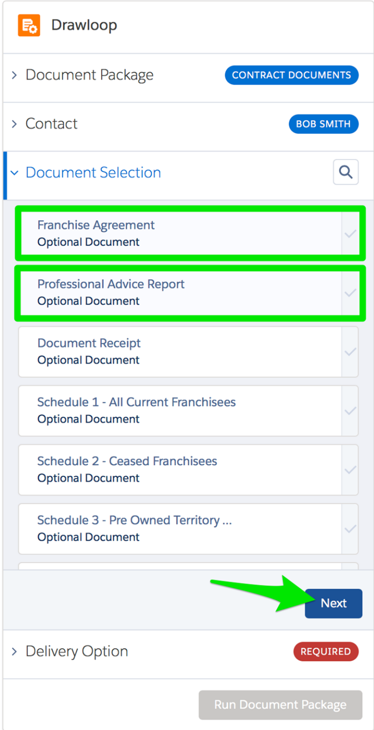


Once you have clicked on the document package, the **Contact** pane opens revealing a list of contacts.

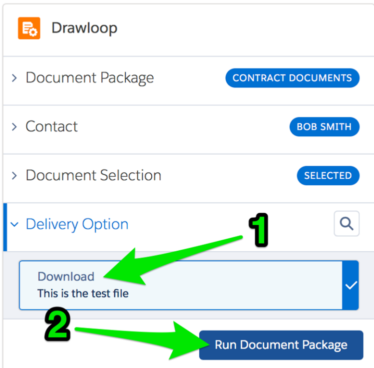
3. Select the **Contact** matching the person appearing in the `Account Name` **field**.



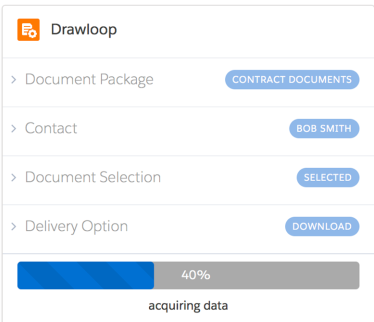
4. Select each document you need to generate, then press **Next**.



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

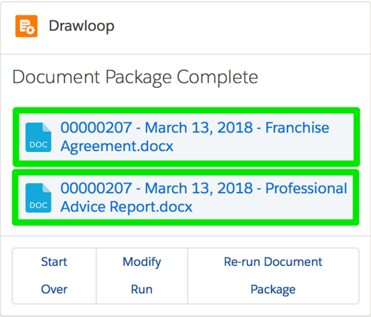


The document package shows a progress bar as it generates the documents.



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.

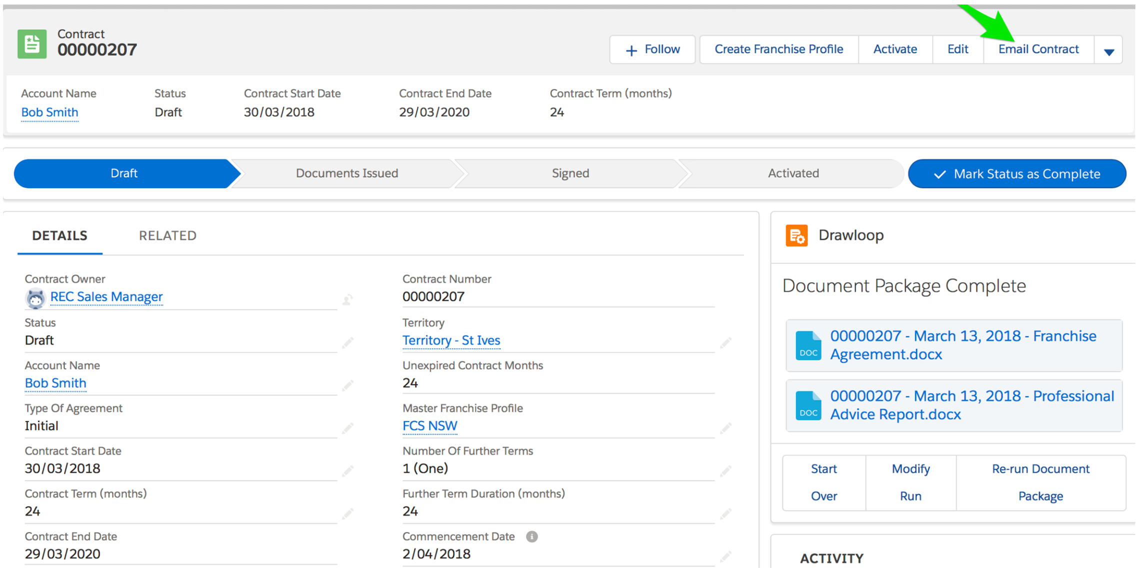
> If you need to edit the contract documents manually, you can make the changes to the downloaded documents and then upload the final contract documents to the Contract record using the standard Salesforce file upload functionality on the **Related** tab.

How to issue contract documents

Contract documents can be issued via email or manually.

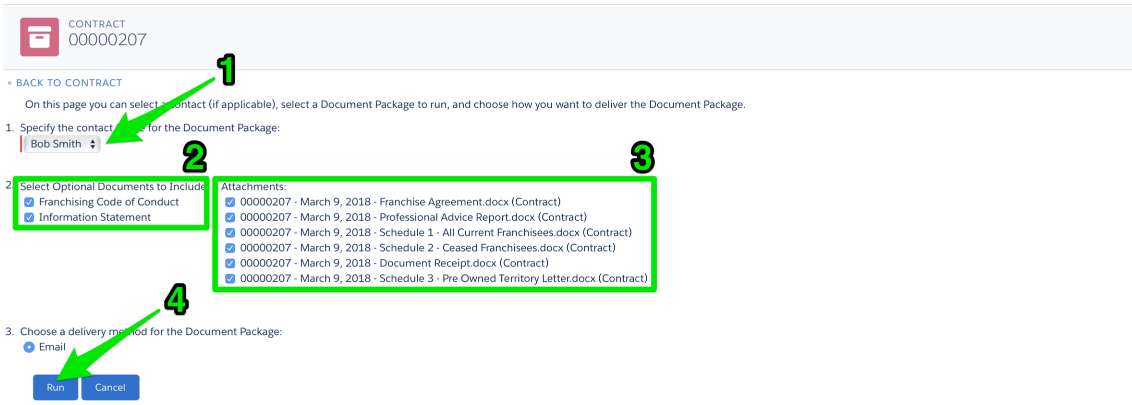
To issue documents via email

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



An email details page appears.

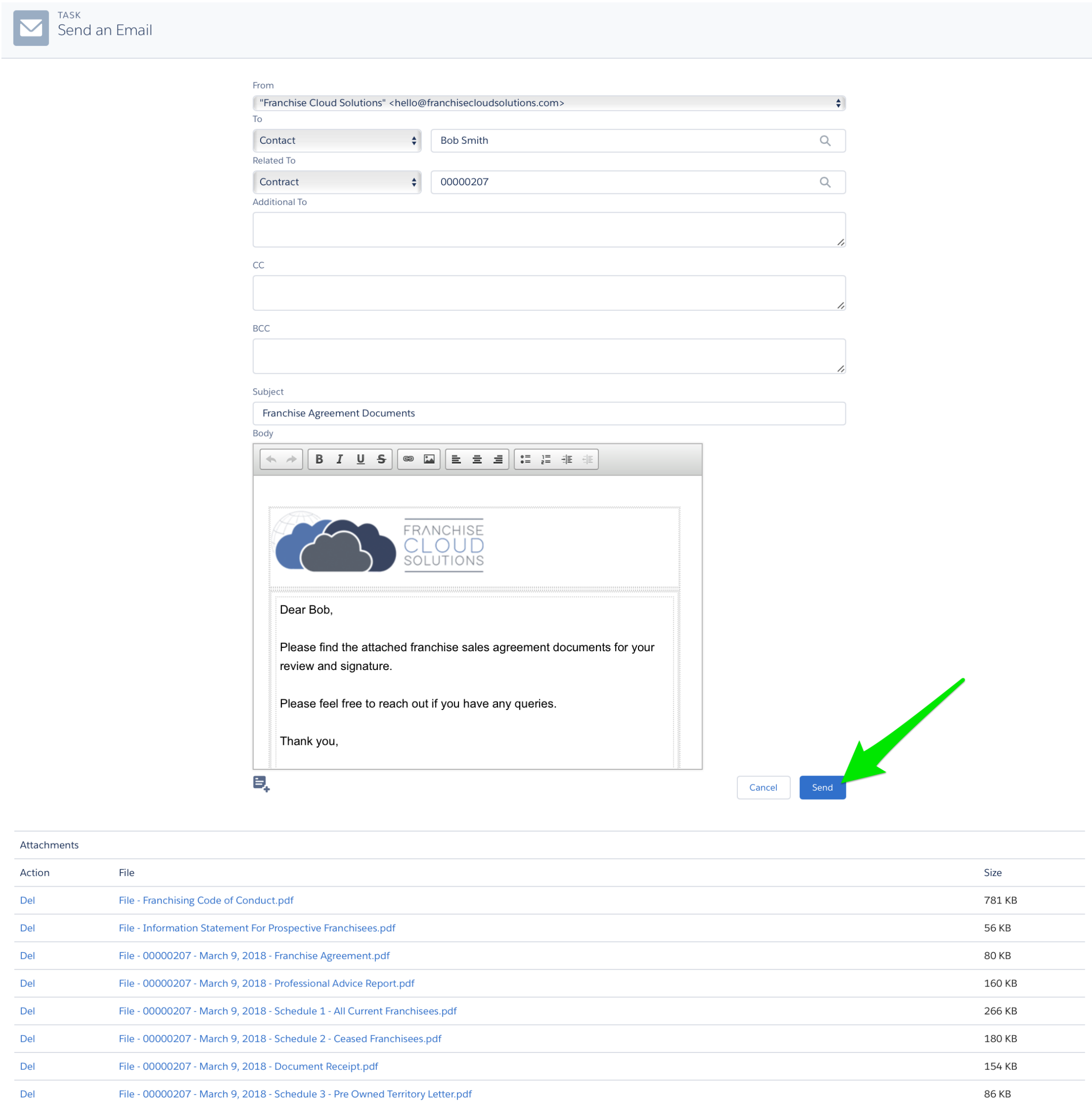
2. Select the recipient `Contact`, the `Optional Documents` and the relevant `Attachments`, then press **Run**.



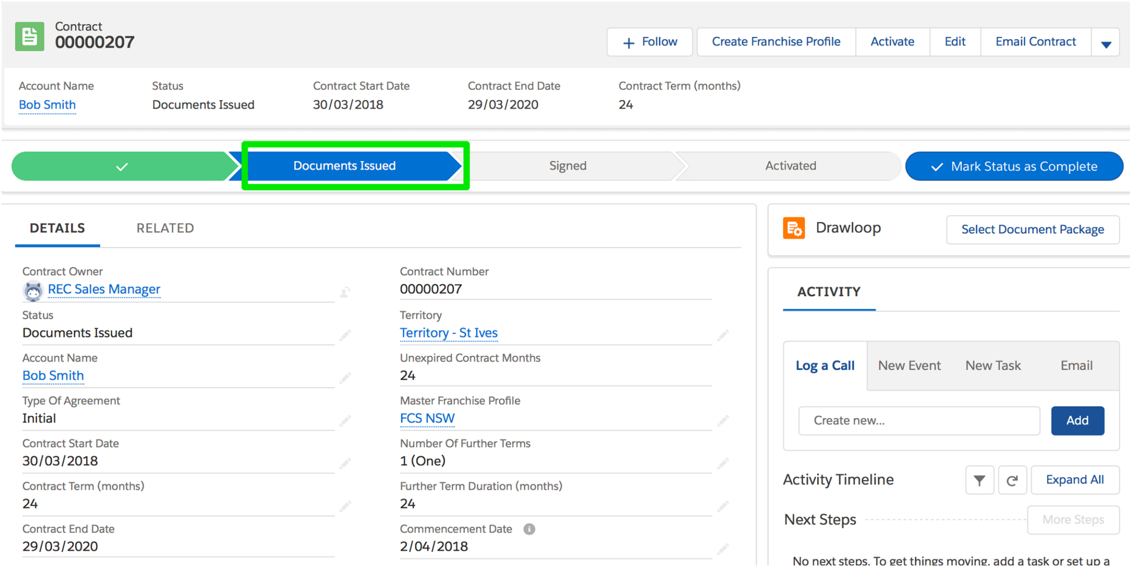
The system mail merges the documents, converts them to PDF, and then presents you with a **Send an Email** page.

> 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**.



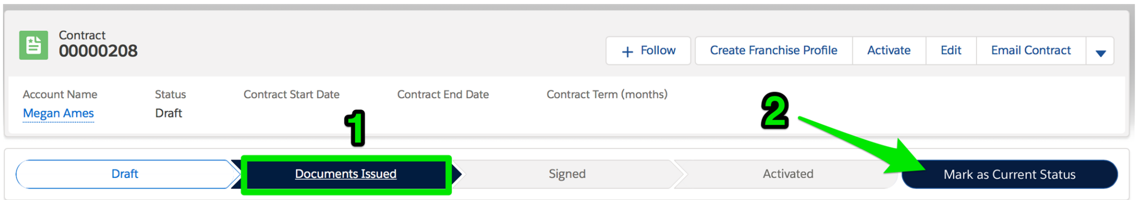
4. The system automatically advances to the **Documents Issued** status and sets the `Documents Issued` date.



> If any key fields are edited after the documents are issued, the contract is reset to draft and the `Documents Issued Date` is cleared.

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**.



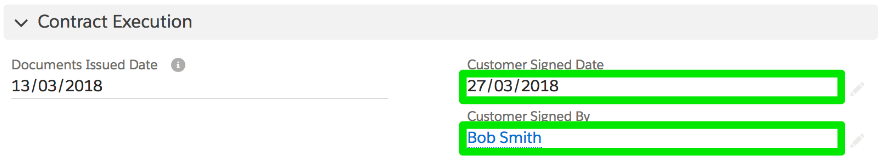
How to sign issued contract documents

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

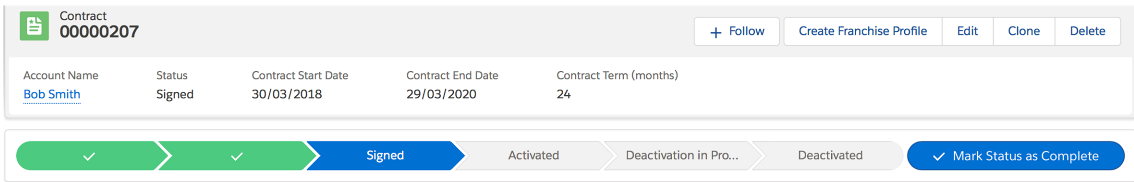
> In compliance with the Australian Competition & Consumer Commission Franchising Code of Conduct, there must be fourteen days between the `Documents Issued Date` and the `Customer Signed Date`.

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.



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

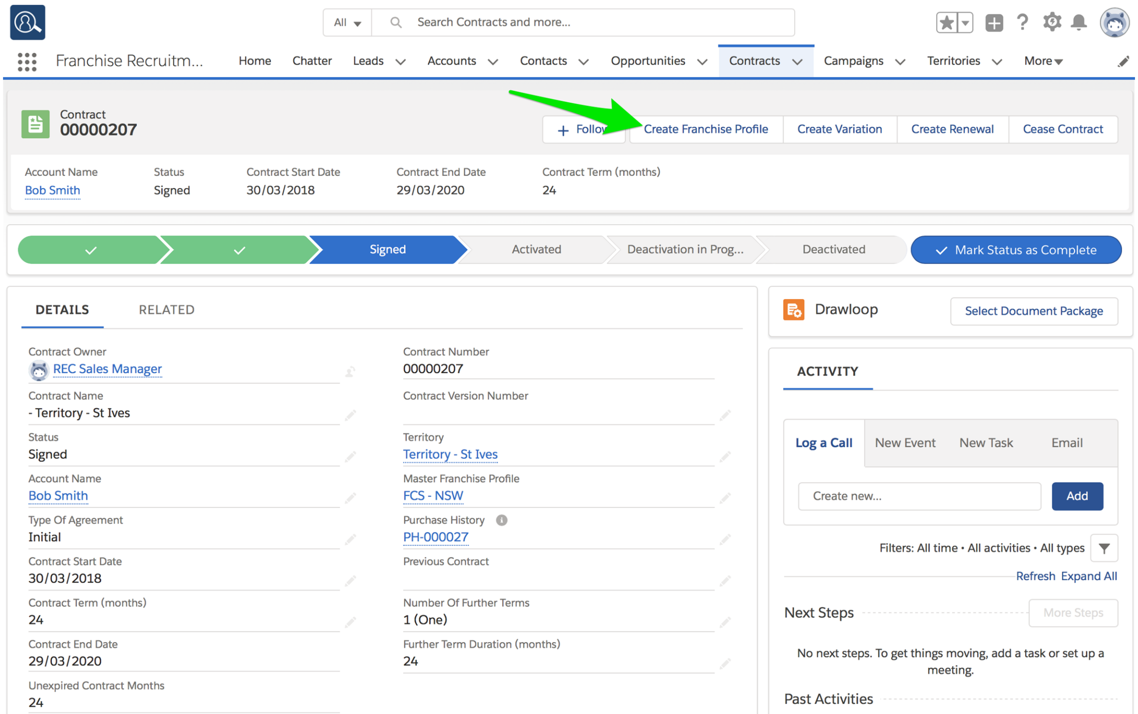


How to create a franchise profile account

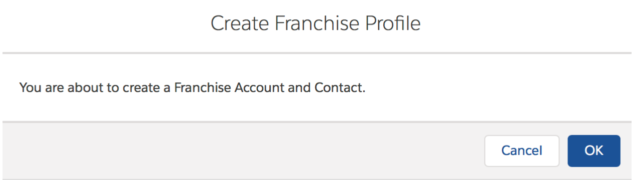
Once the Contract has been signed, you will want to convert the Contract information into a Franchise Profile Account. The Franchise Profile Account forms the trading account the new franchise owner will use for their business.

To create a new Franchise Profile

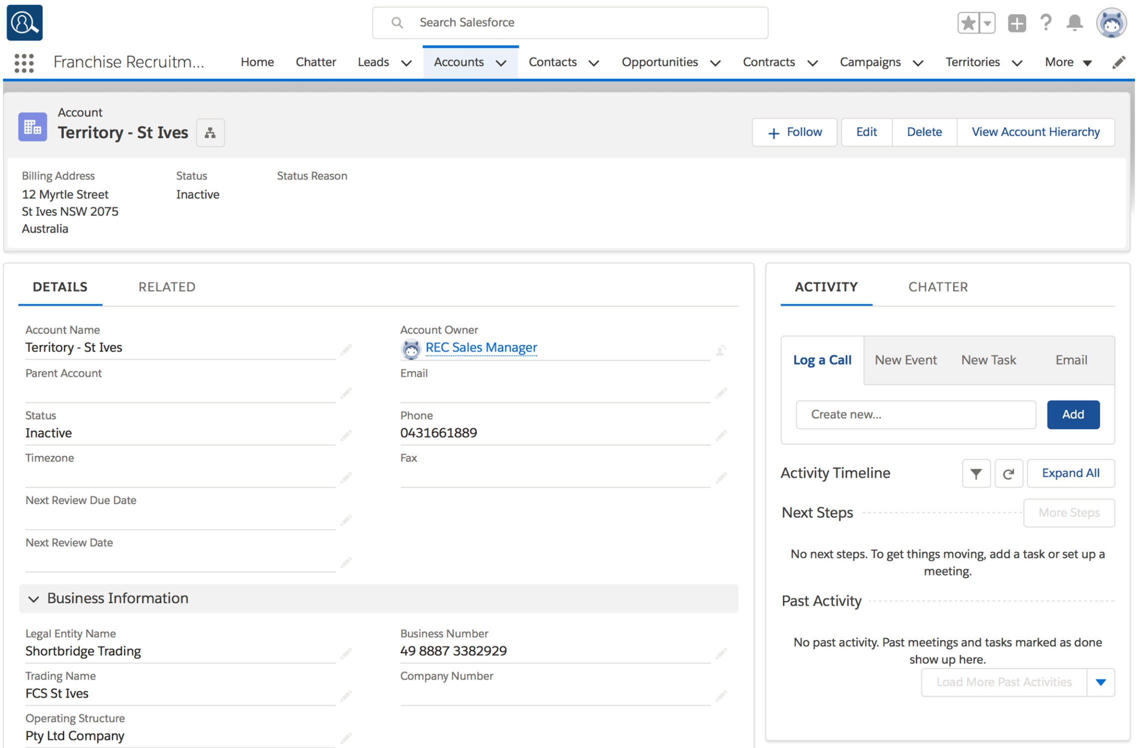
1. From the **Contract**, press **Create Franchise Profile**.



The **Create Franchise Profile** confirmation dialog box appears.



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



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.

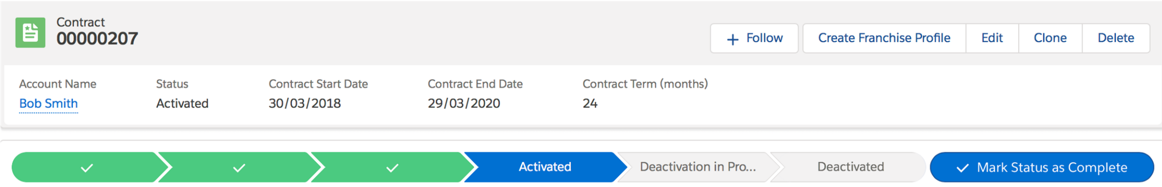
> To ensure you're using the new Contact record in the future, you can always access it from the Contacts list view named "All Franchise Contacts".

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.



Once the **Contract** is `Activated` the territory's `Status` is set to `Owned`.

CHAPTER 6

Working with Accounts

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 Profile	The business account of an operating franchise.
Master Franchise Profile	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. *See* “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 Candidate Account. *See* “When a franchise opportunity turns out to be an employment candidate” on page 142.
Franchise Profile	The business account of an operating franchise business. *See* “How to create a franchise profile account” on page 135.
Master Franchise Profile	The business account of a master franchise business. Typically created during implementation or by an administrator.

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.

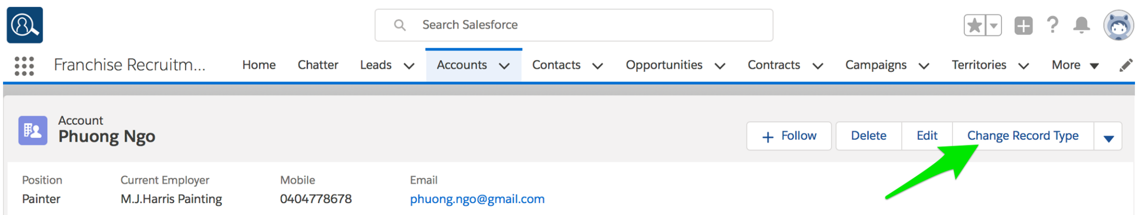
When a franchise opportunity turns out to be an employment candidate

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.

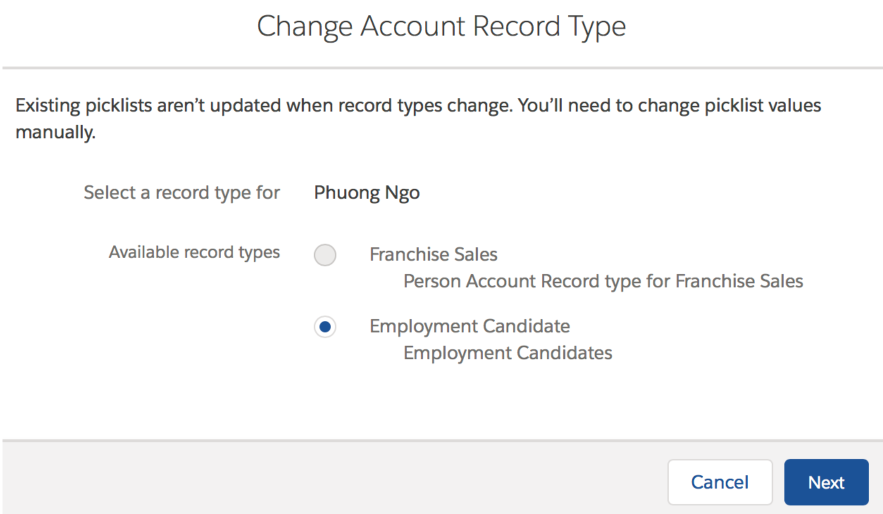
> Treat this account type as an extension of the Employment Candidate Queue. You will need to determine your internal process for working with potential employees.

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

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

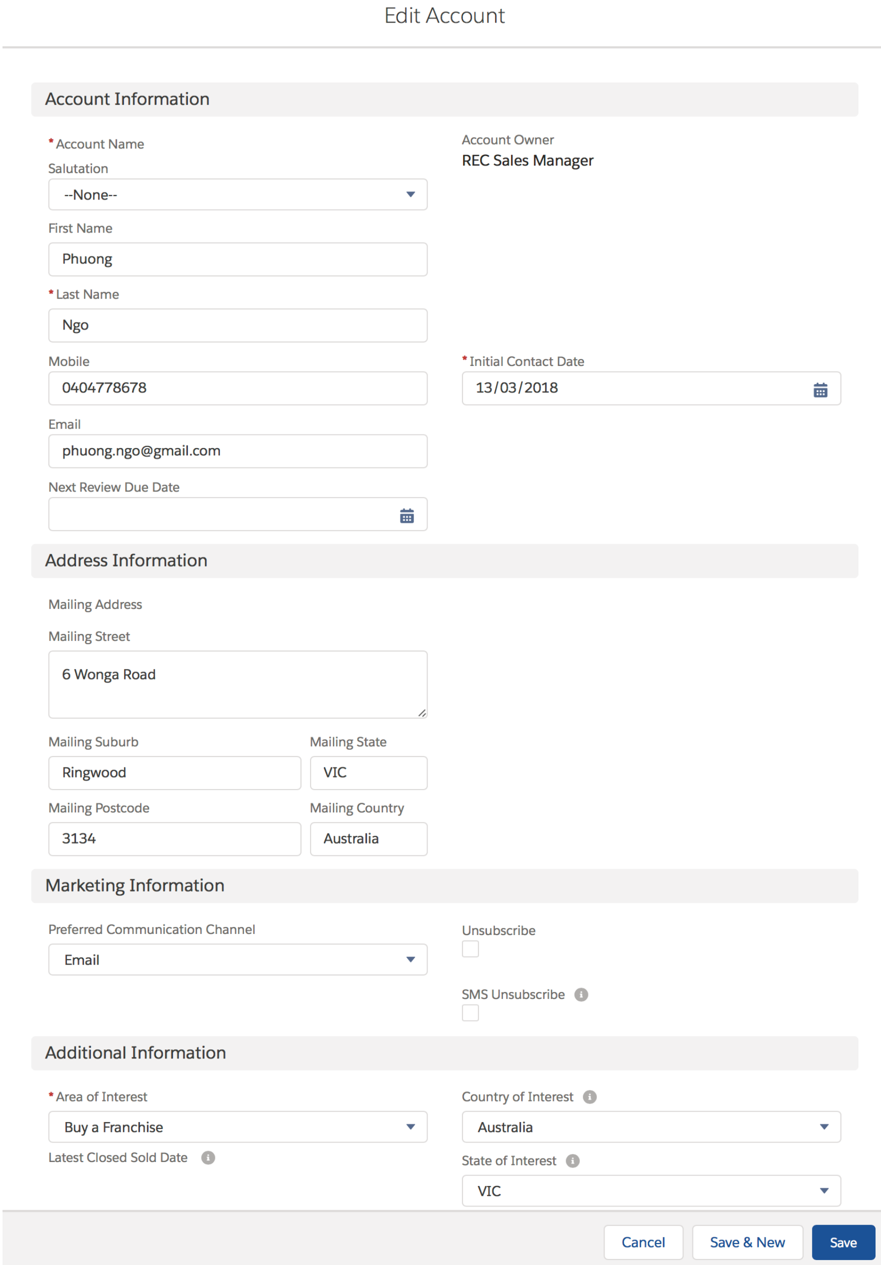


The Change Account Record Type dialog box appears. The selection within this box is already "switched" from the current type to the "other" type of record.



> 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.



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.

CHAPTER 7

Supporting the Sales Process

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.

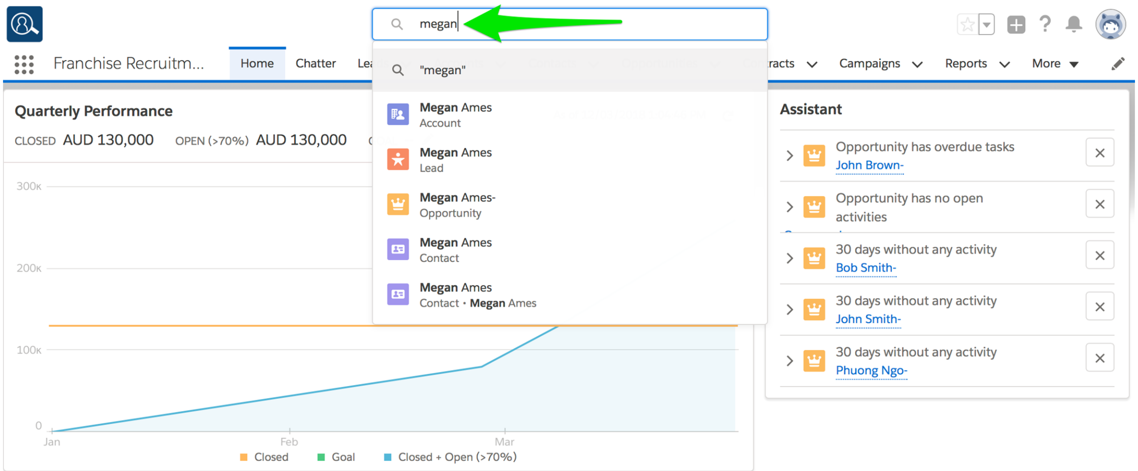
> When recording new leads over the phone, *See* "Manually created leads" on page 48.

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.

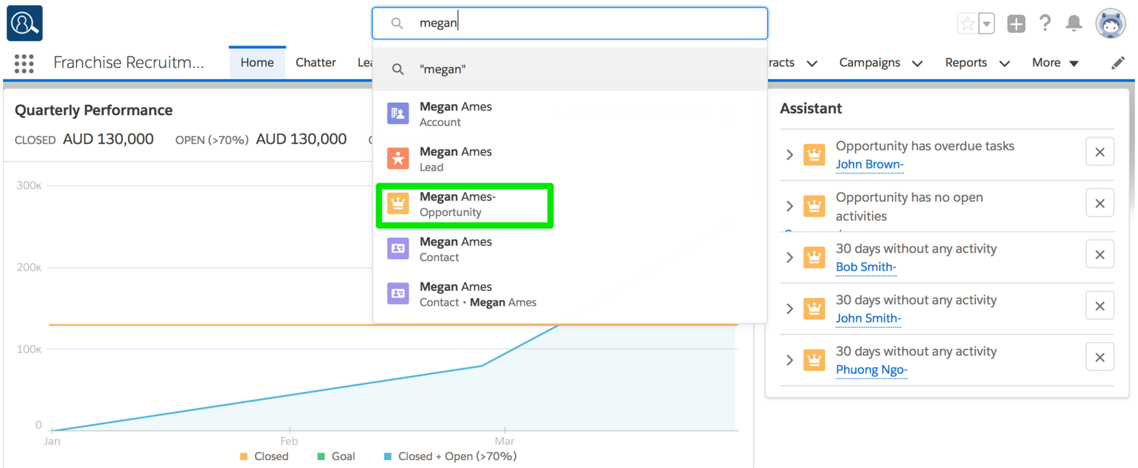
To locate a person's record

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

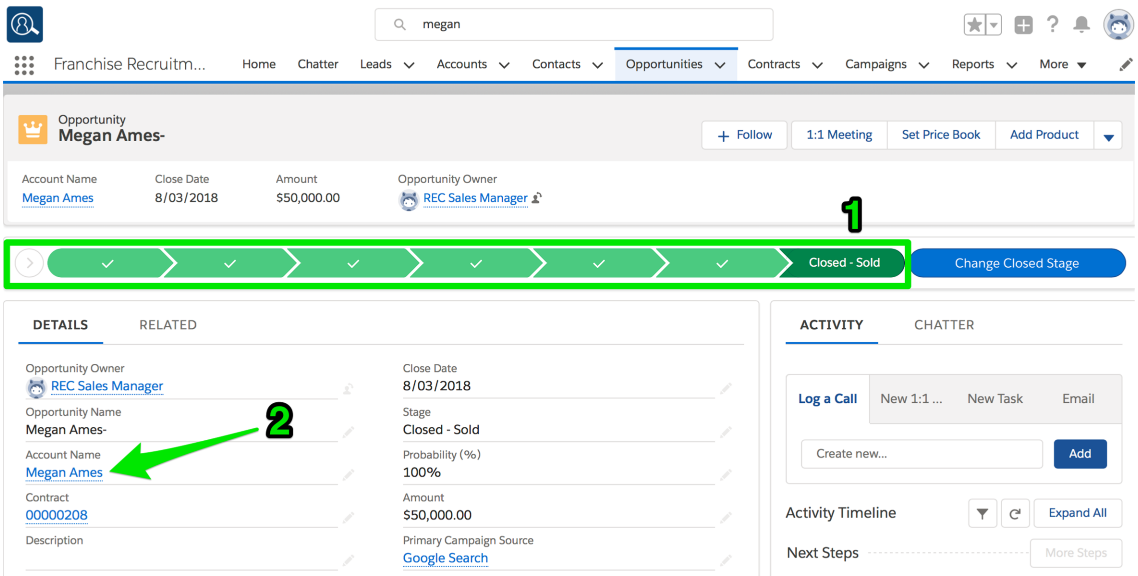


   Salesforce displays a list of records that match the name you entered. The type of each record is displayed.

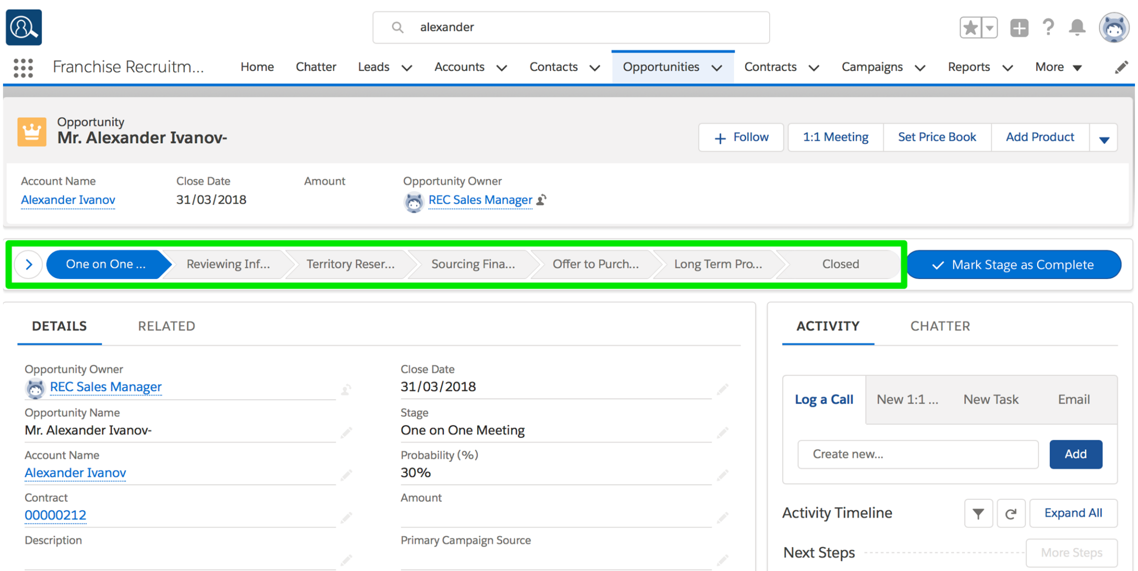
2. If there is an **Opportunity** record, try that one first. Select the **Opportunity**.



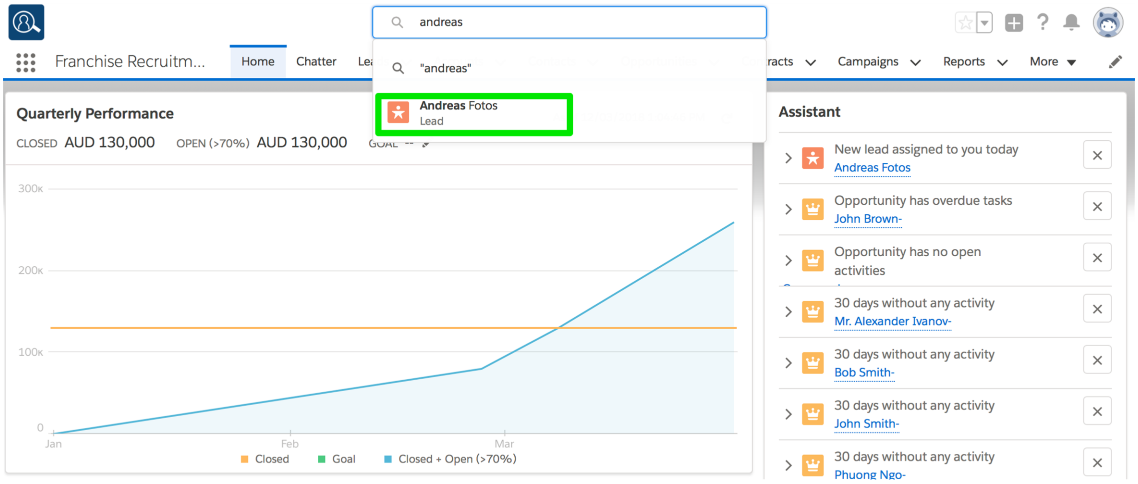
3. Check the Opportunity stage. If the Opportunity stage is closed, then click on the `Account Name` link and record the information in the related Account.



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



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



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

Just double-check you're not misspelling their name.

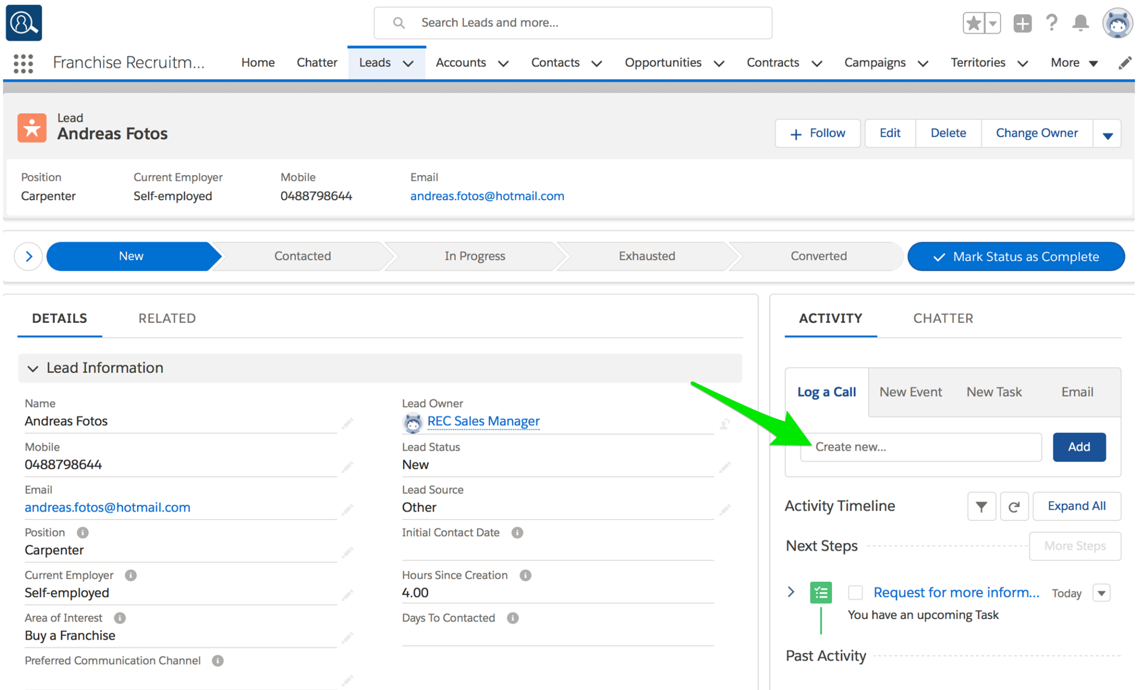
To enter new customers, *See* "Manually created leads" on page 48.

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.

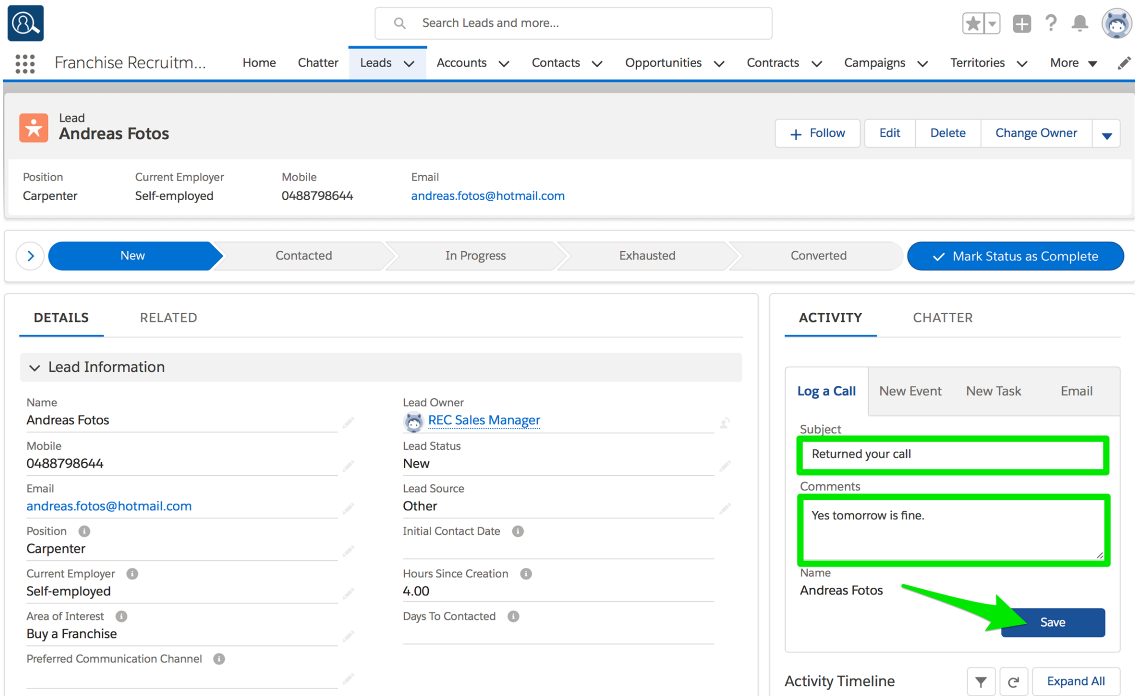
To record information

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…**

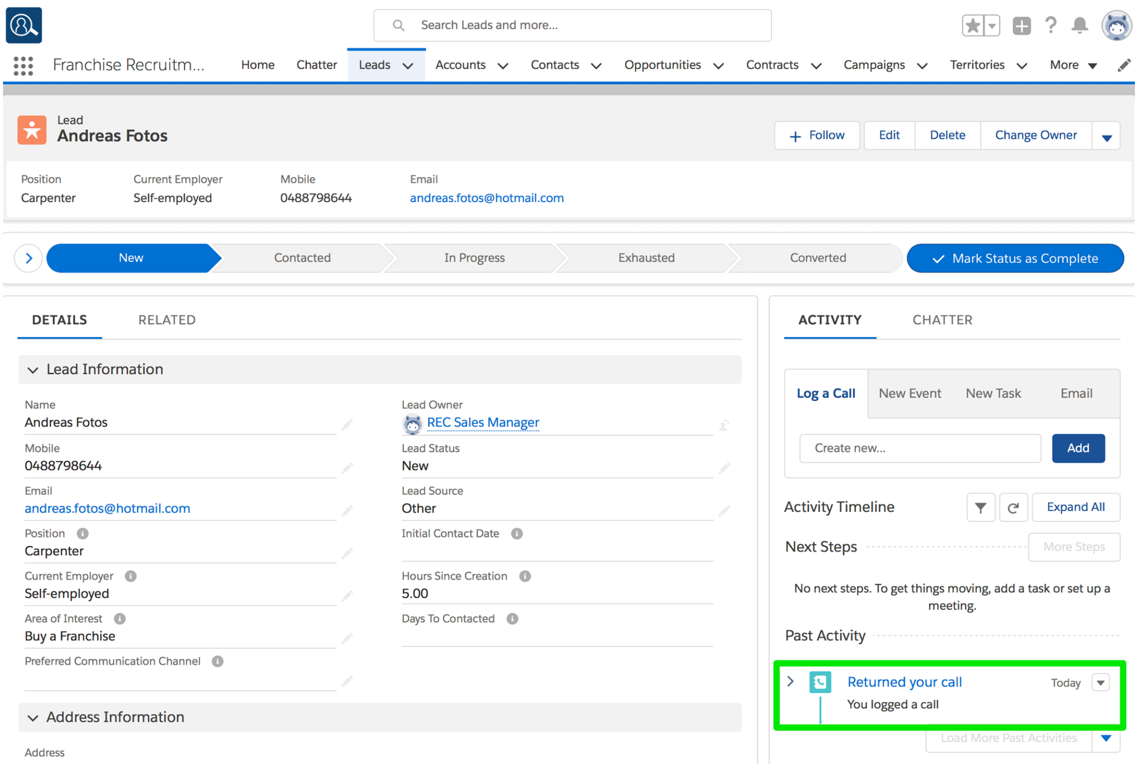


The **Log a Call** activity pane displays.

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



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



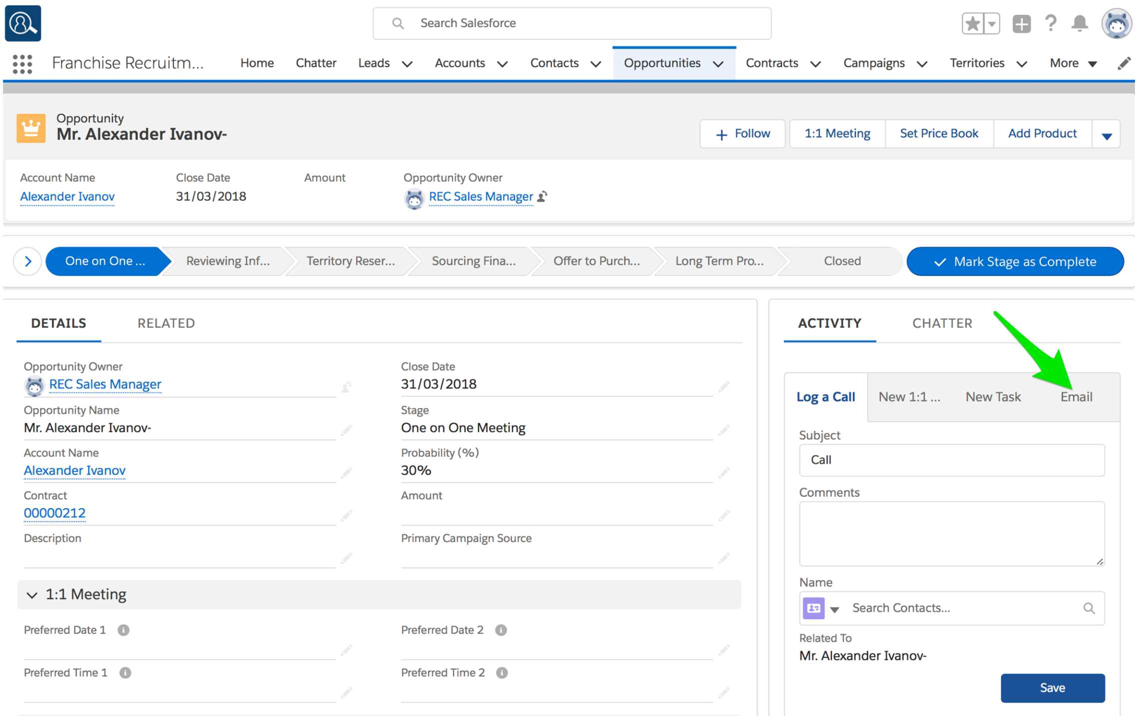
How to send an email

Salesforce allows you to send an email to the 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.

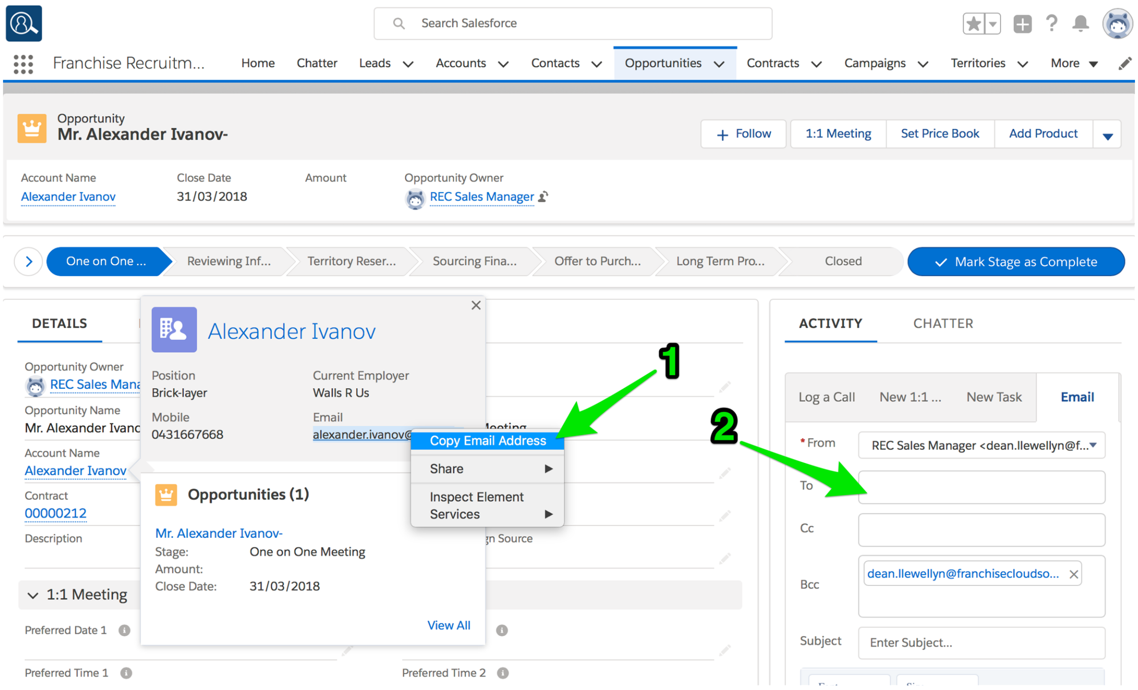
To send an email

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.

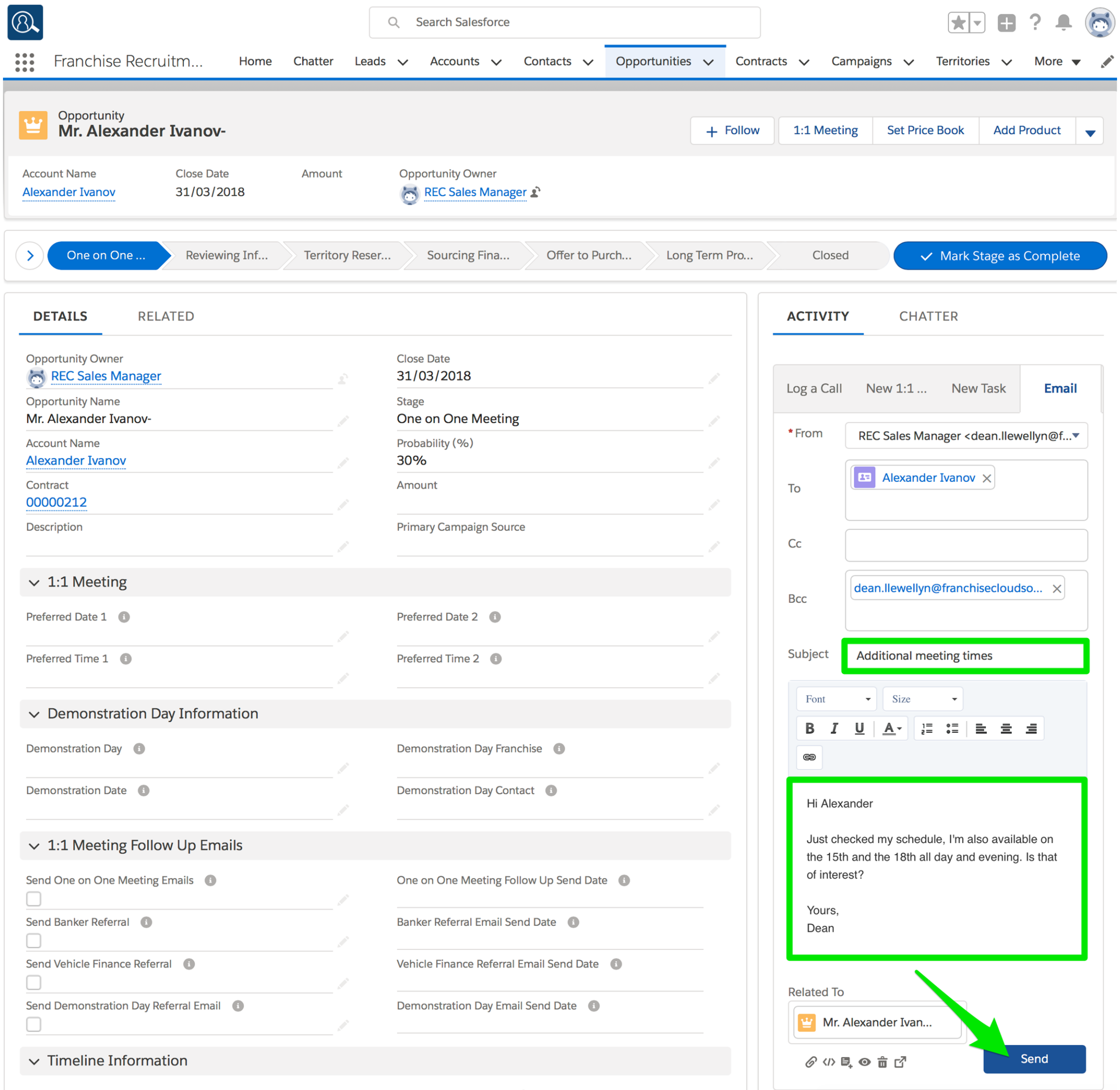


The **Email** tab displays, and shows the owner of the record in the `From` address.

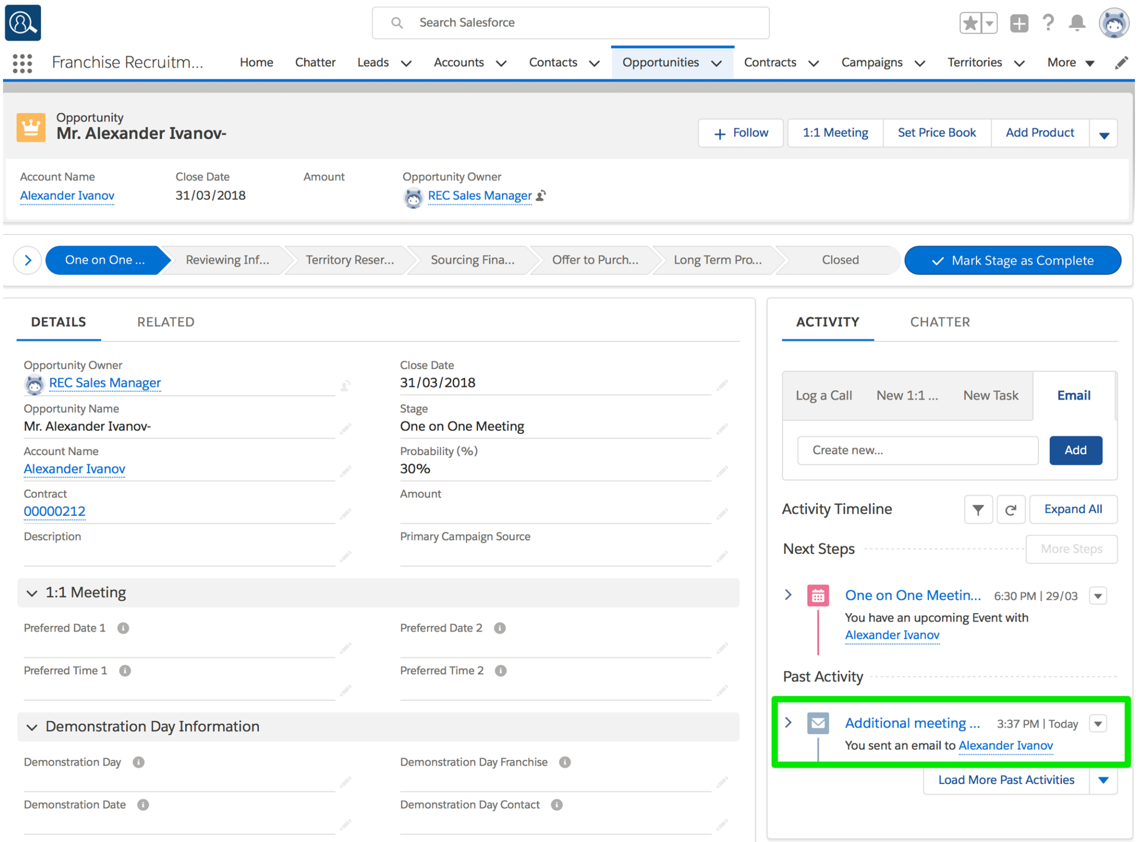
3. Copy the email address from `Account Name` and paste it into the `To` field.



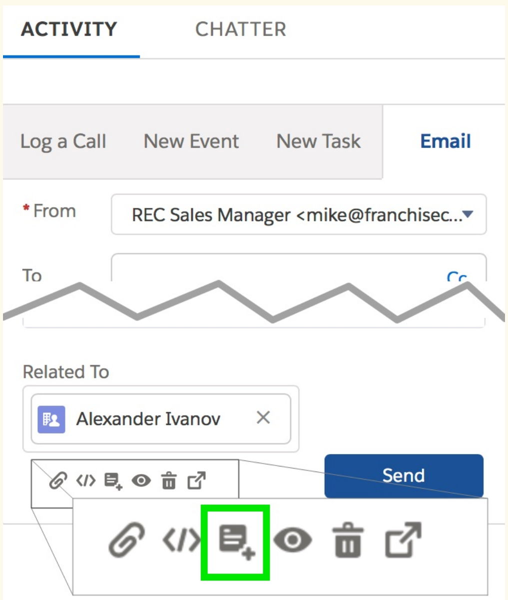
4. Complete `Subject` and `Details` then press **Send**.



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



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



How to edit default email templates

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

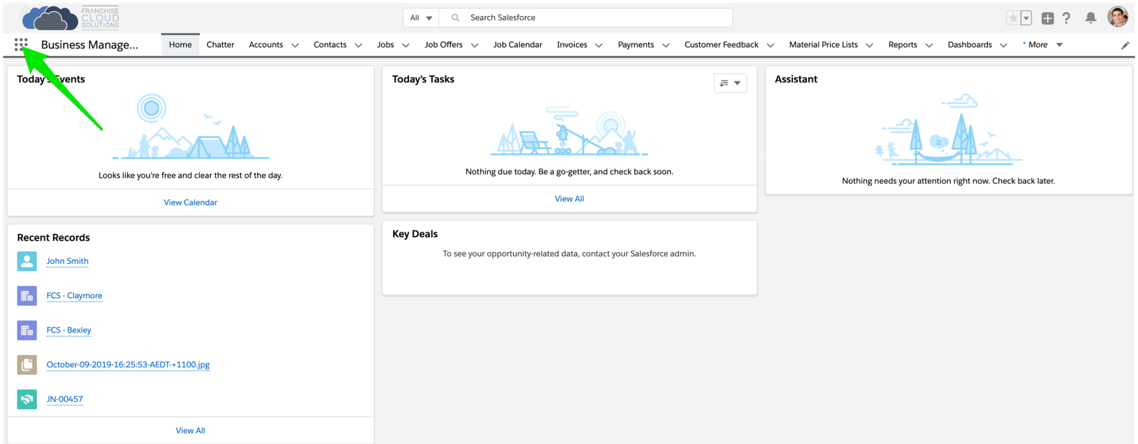
> Ask your system administrator to edit the templates for you.

How to review email template headers and footers

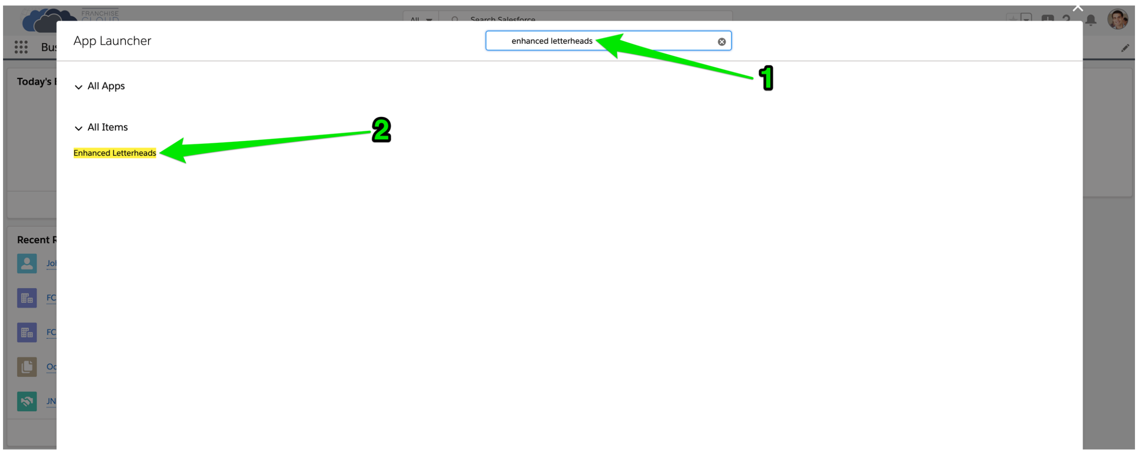
Most likely your franchisor will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

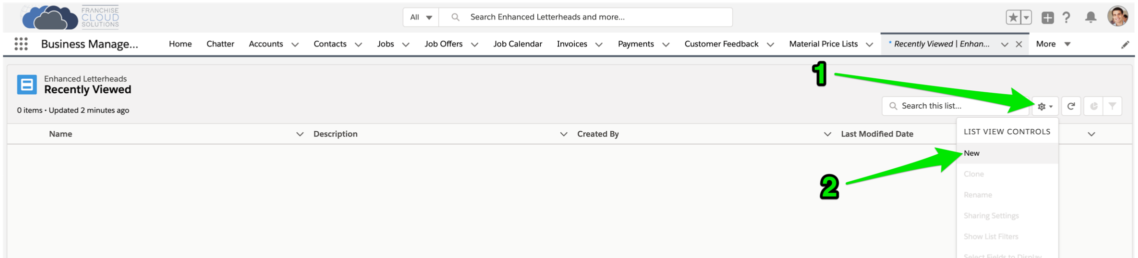
1. Open the **App Launcher**.



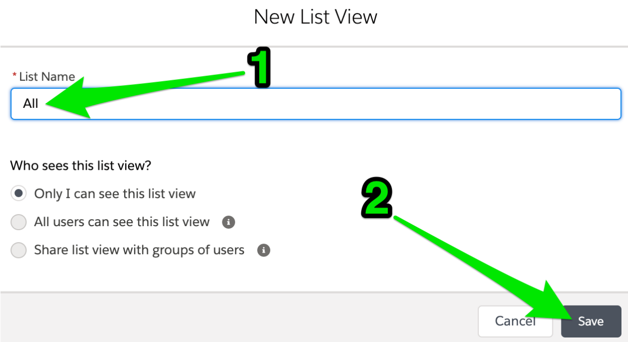
2. In the **App Launcher** `Search` box, enter *`enhanced letterheads`* and select the **Enhanced Letterheads** link.



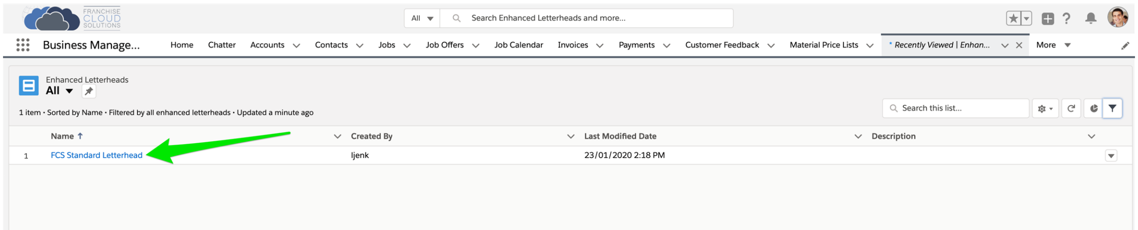
3. You may see an empty **Enhanced Letterheads** list. To see any of the letterheads, create a **New** list view.



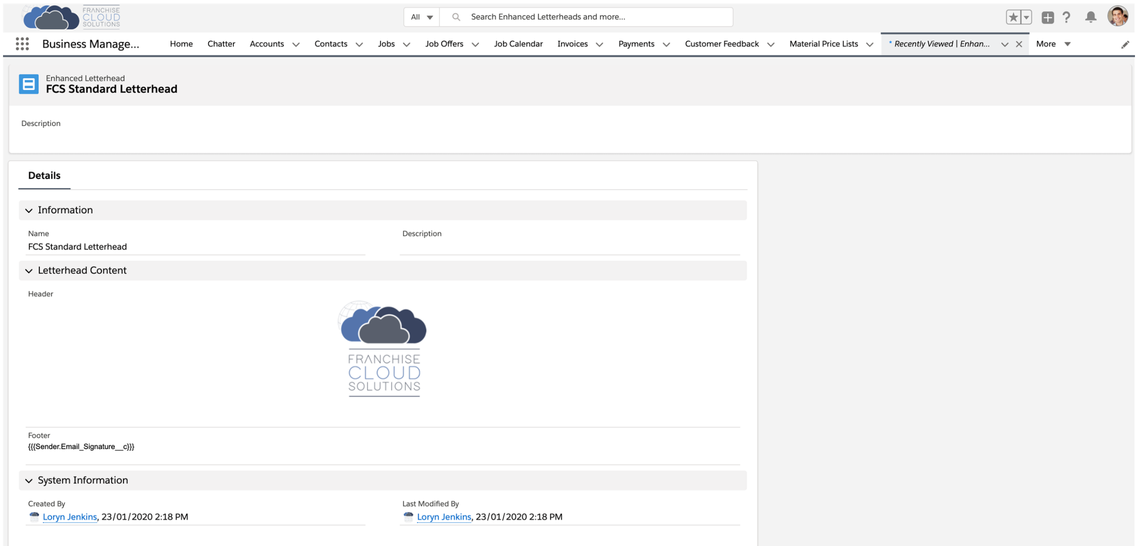
4. Name the list view and press **Save**.

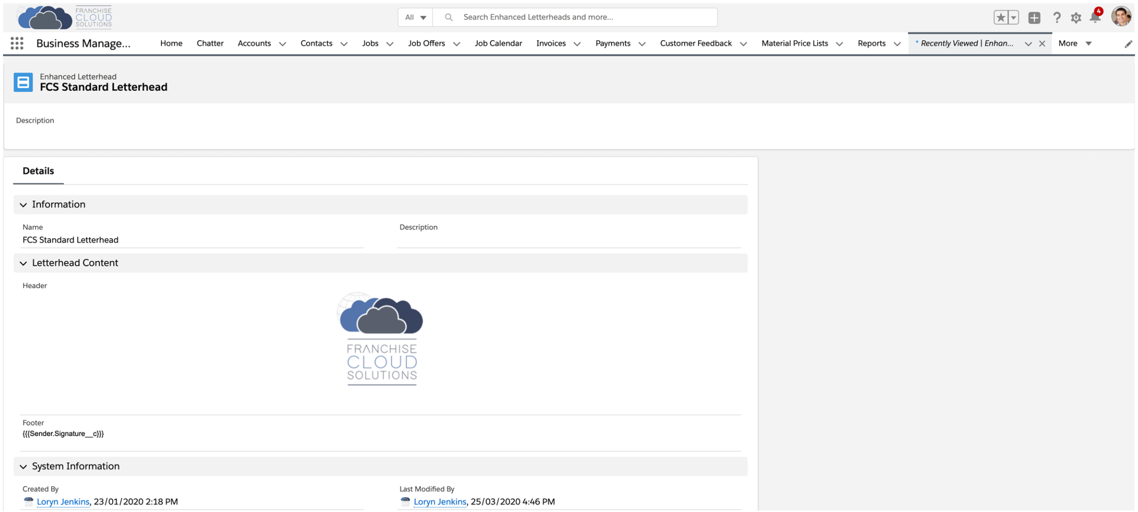


5. Now select the Standard Letterhead.



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





If you would like a change to the Standard Letterhead, speak to your field manager or system administrator.

There may be more than one Letterhead available within your implementation. If there is, review each letterhead to see which one(s) you might like to use. You can add letterheads to any custom email template you might choose to create. *See* "How to create a custom email template" on page 201.

How to create a custom email template

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

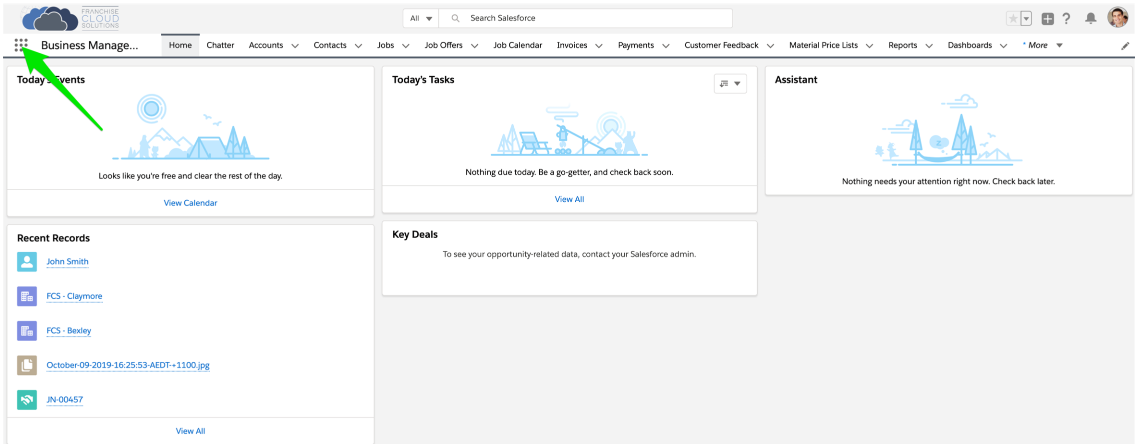
- customized header and footers

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

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

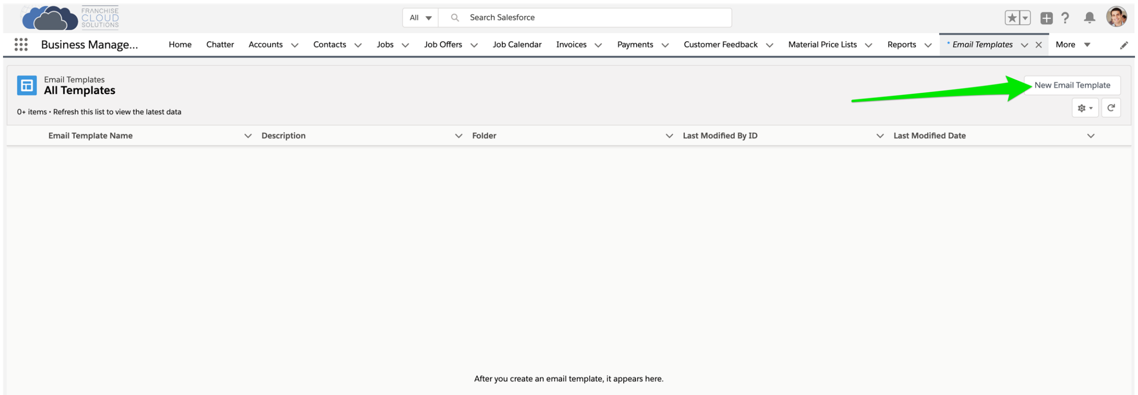
To create a custom email template

1. Open the **App Launcher**.

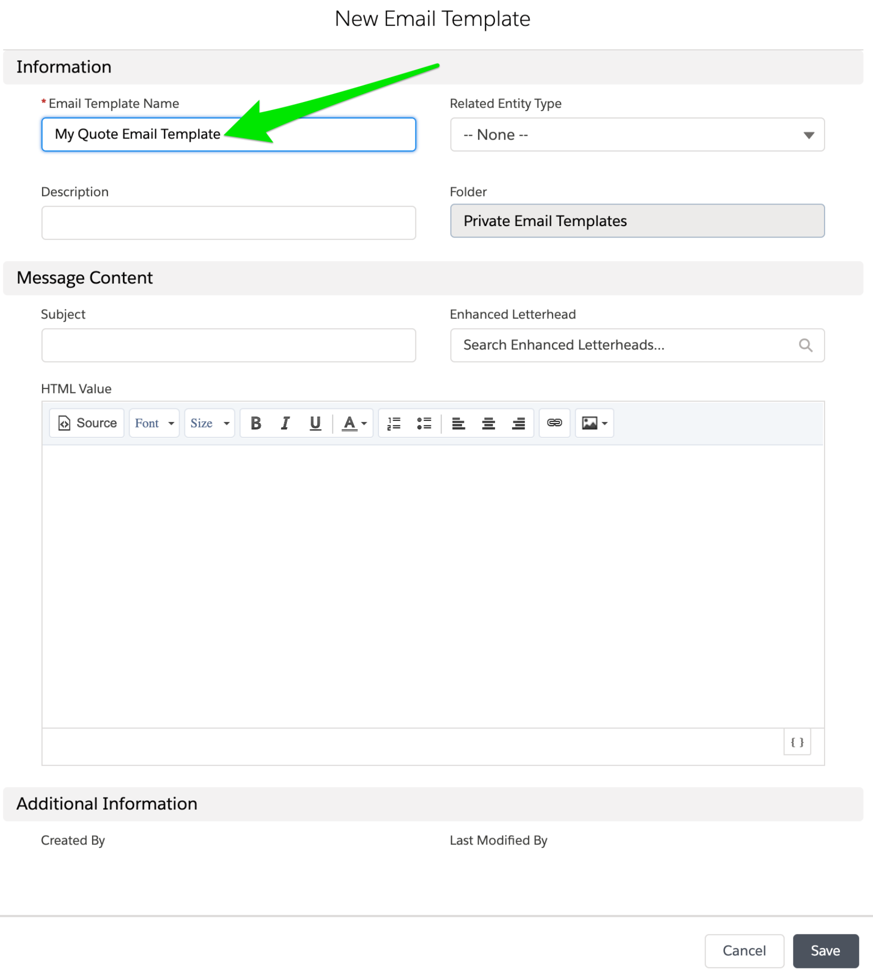


2. In the **App Launcher** `Search` box, enter *`email templates`* and select the **Email Templates** link.

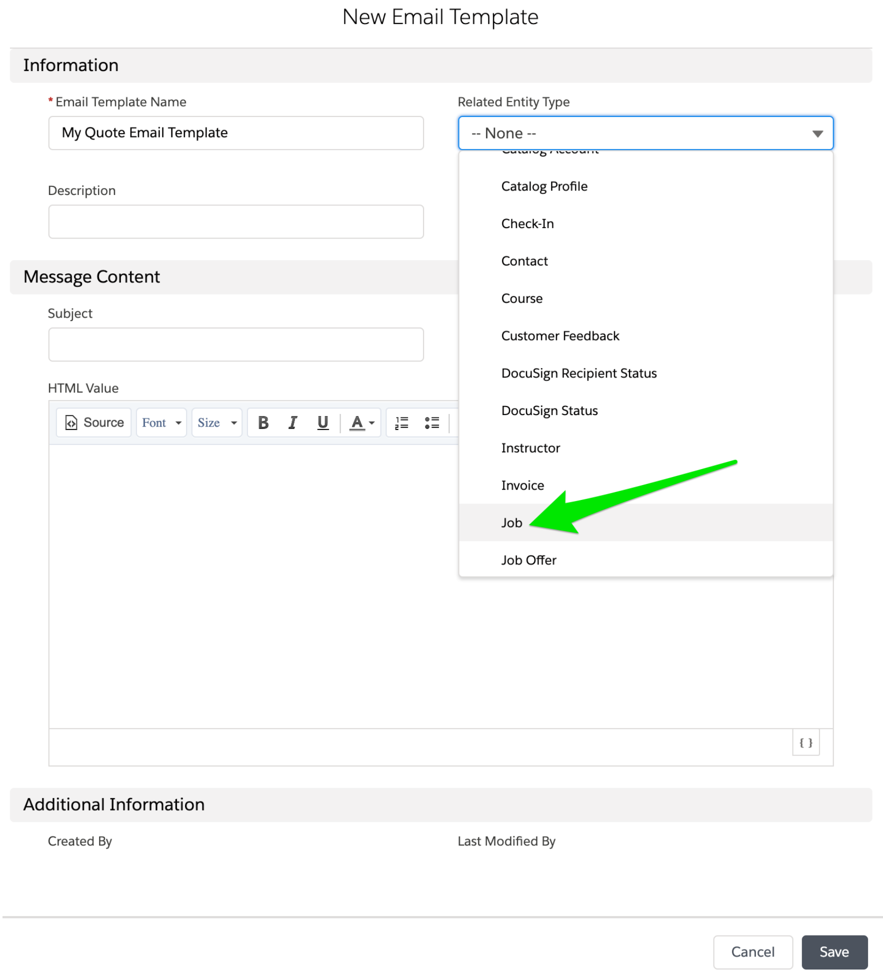
3. You may see an empty **Email Templates** list. Press **New Email Template**.



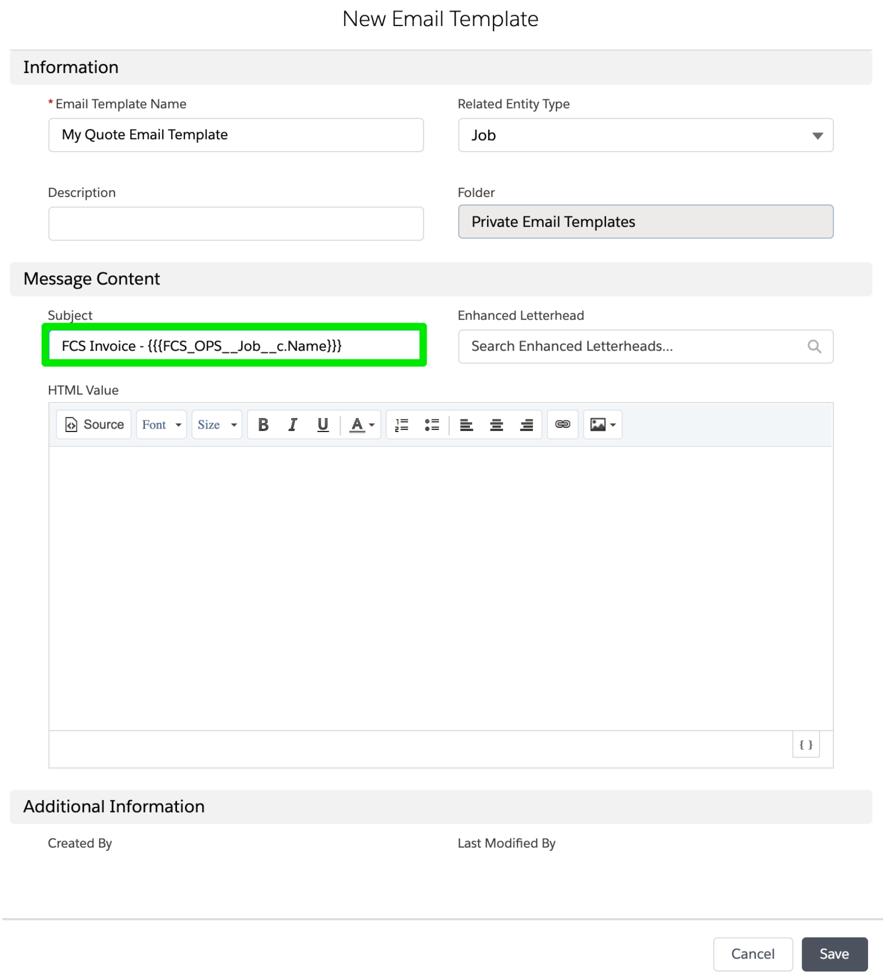
4. Insert an email template name that will help you identify it.



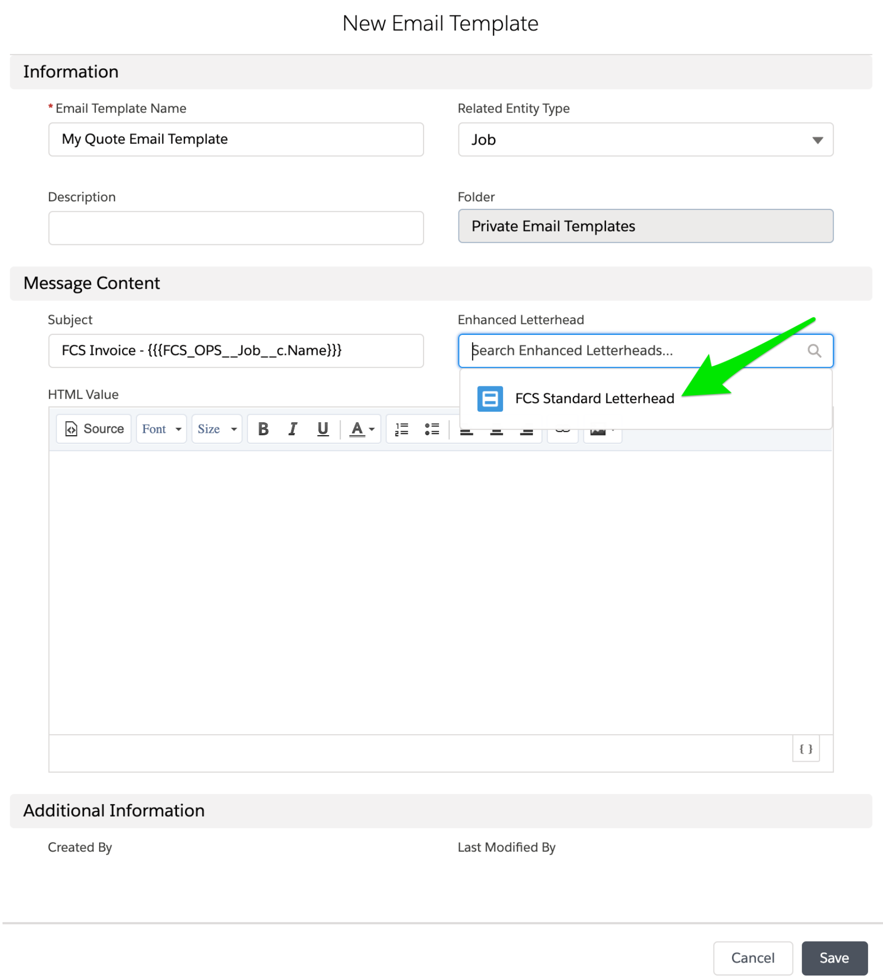
5. If you are going to use merge fields, you must base the email template off a particular entity type. Leads should be based on Lead.



6. Enter an email subject line.

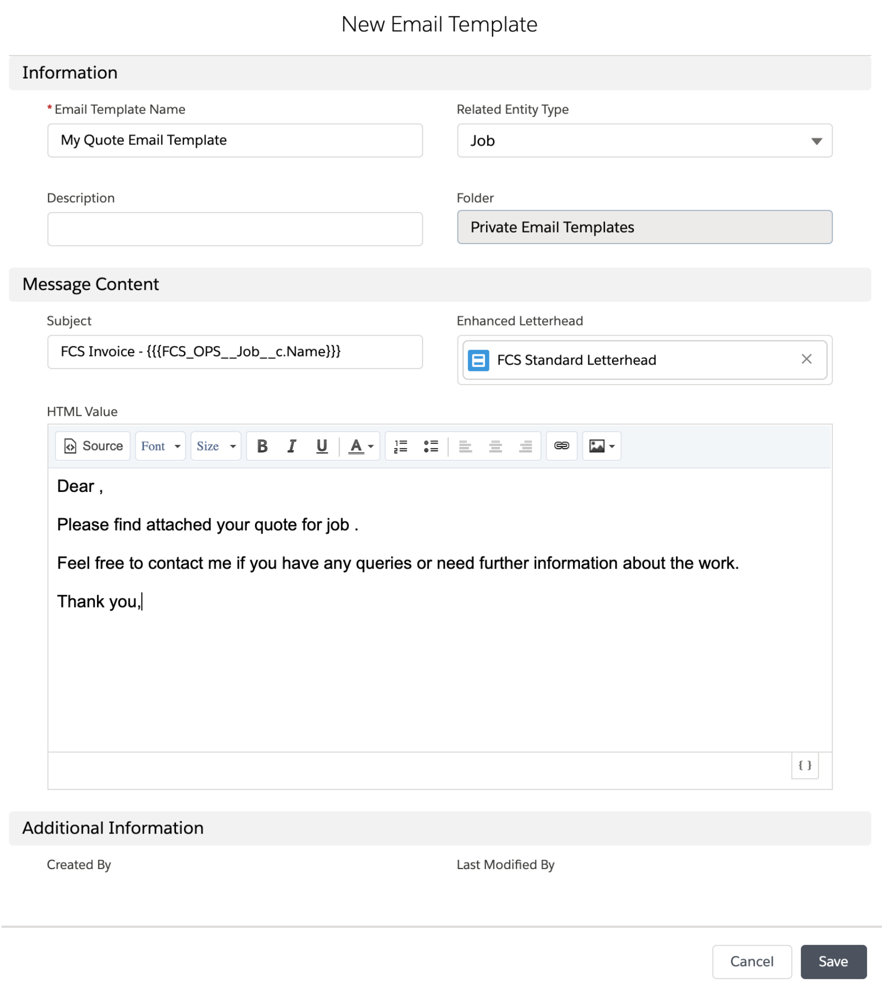


7. Select an appropriate letterhead.

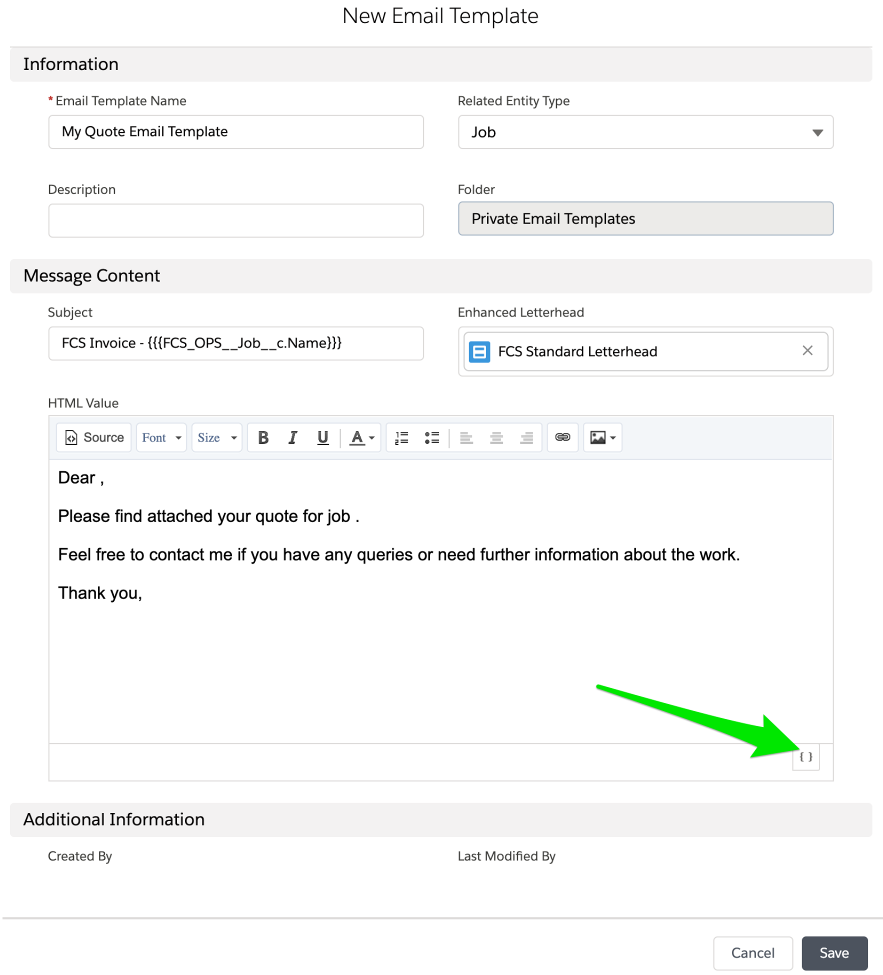


You can review the available letterheads. *See* “How to review email template headers and footers” on page 198.

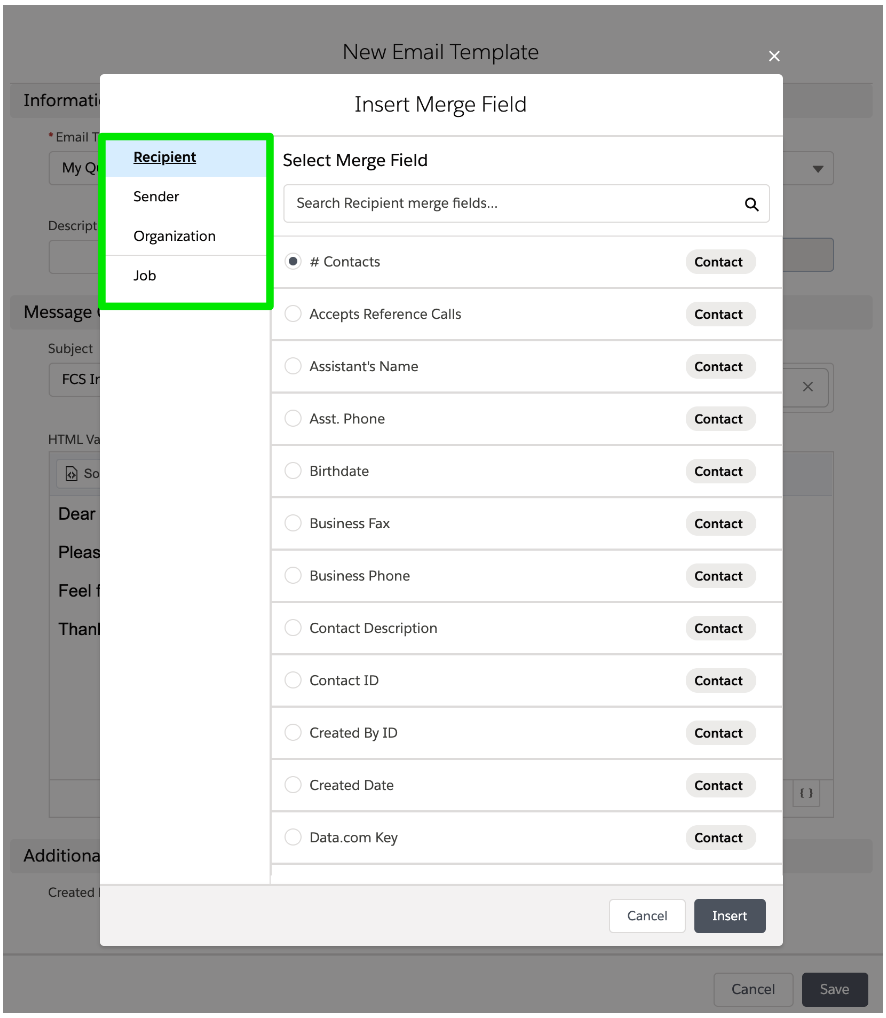
8. Enter boilerplate text into the `HTML Value` field.



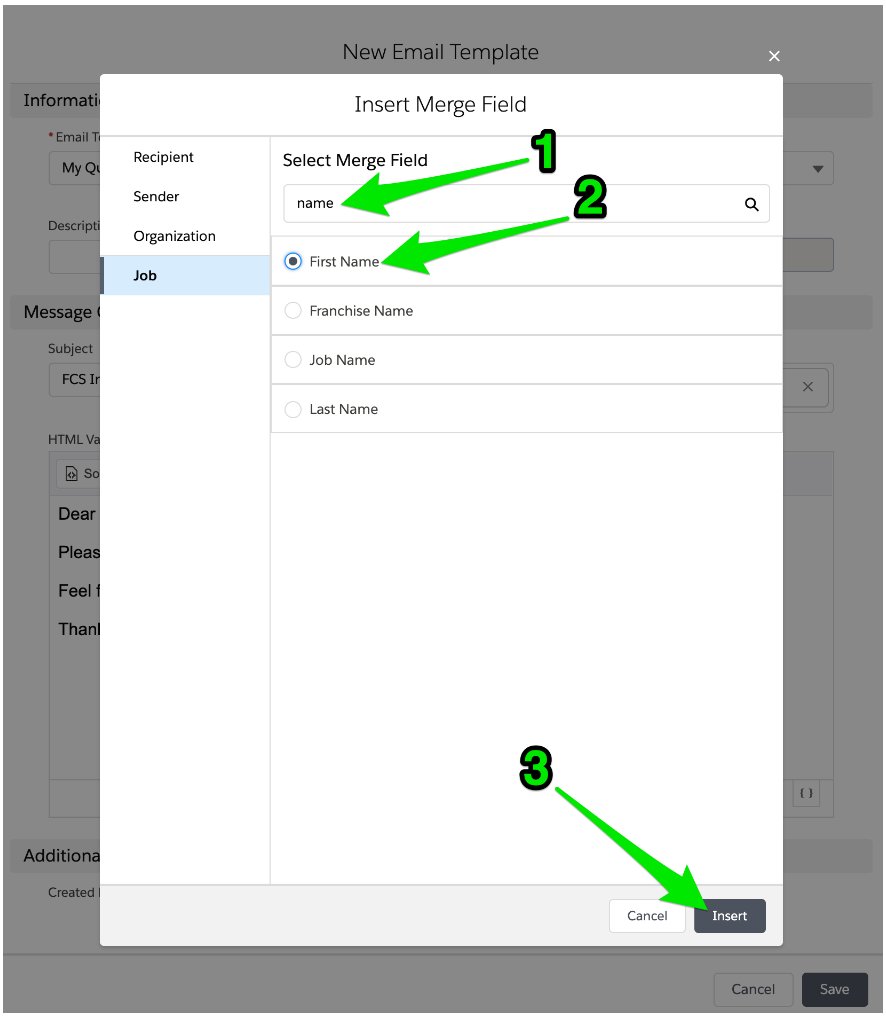
9. To insert variables into the email template body, press the **Insert Merge Field** button (i.e. the brace button { }).



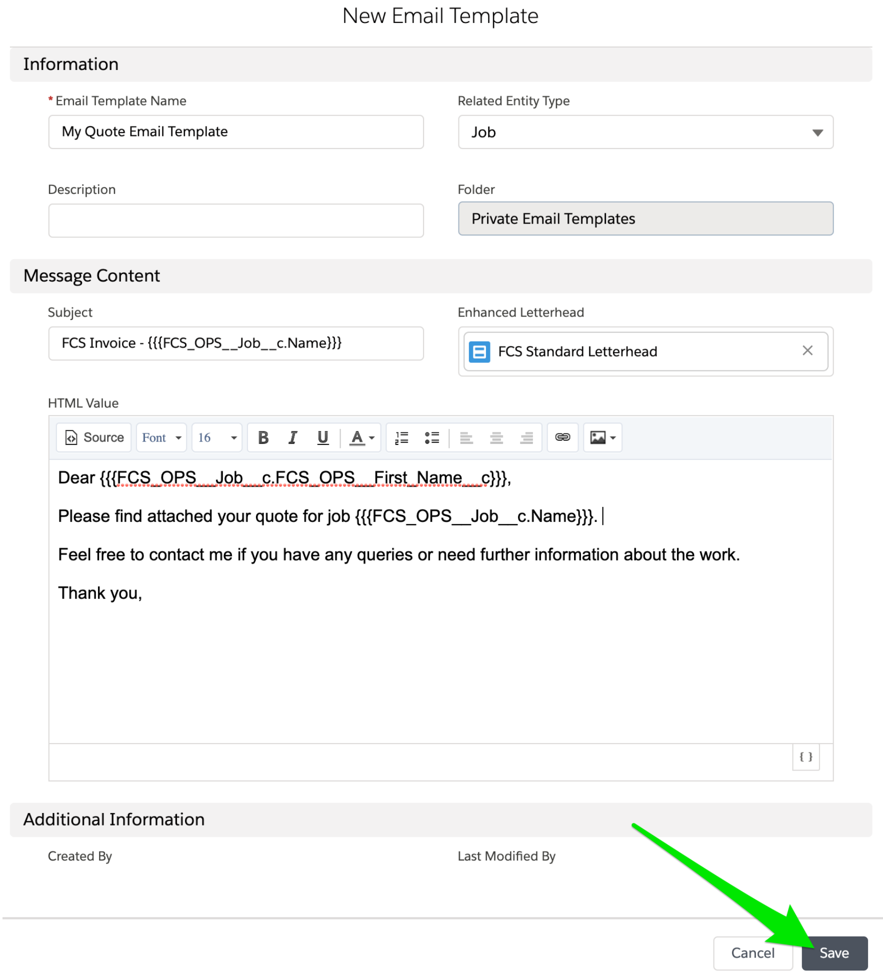
10. Select the Object Reference. Sometimes you might reference yourself (Sender) or your organization (Organization).



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



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



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

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.

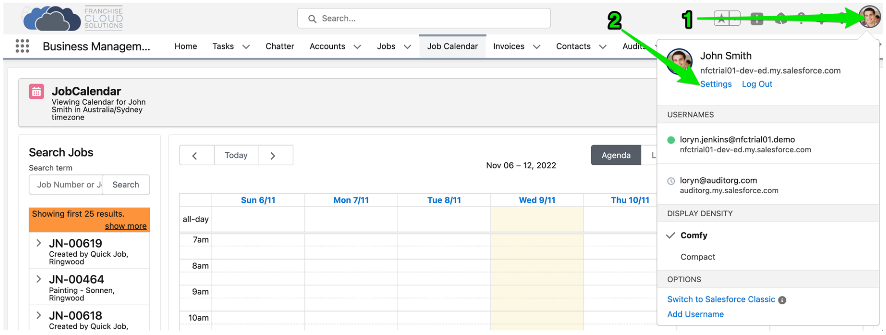
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.

How to send all emails to my inbox

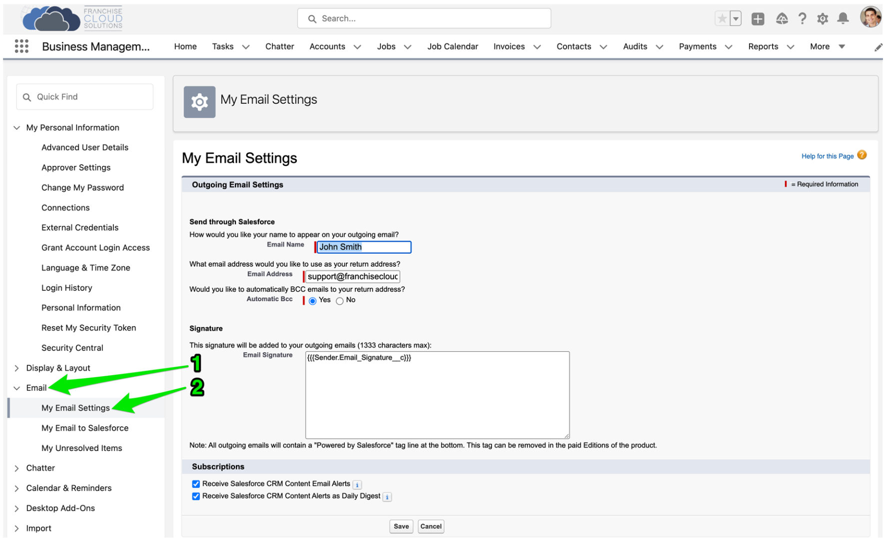
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

To blind copy all emails to your email address

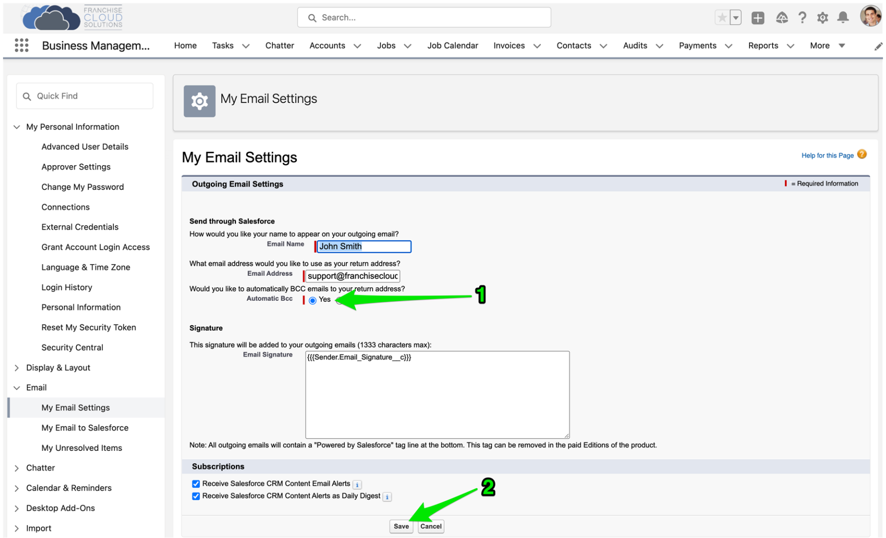
1. Go to **View Profile** and choose **Settings**.



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



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



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

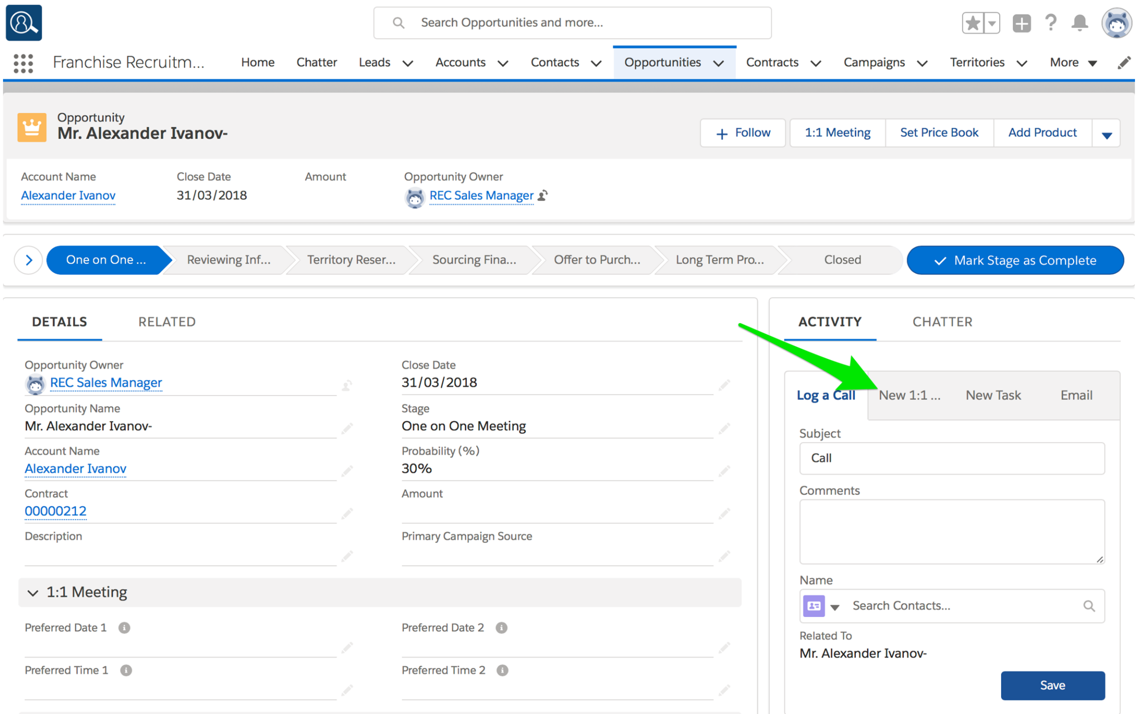
How to schedule a one on one meeting

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

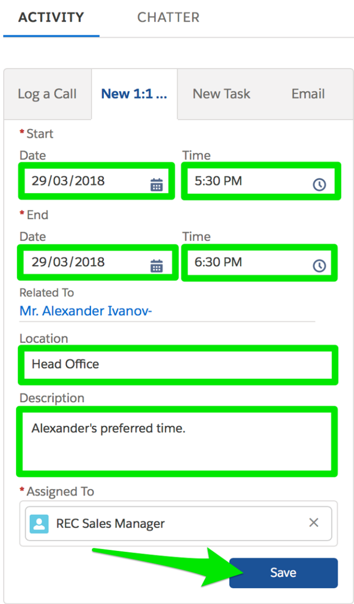
> To check the sales representative's availability, How to check availability.

To schedule a one on one meeting

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



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



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.

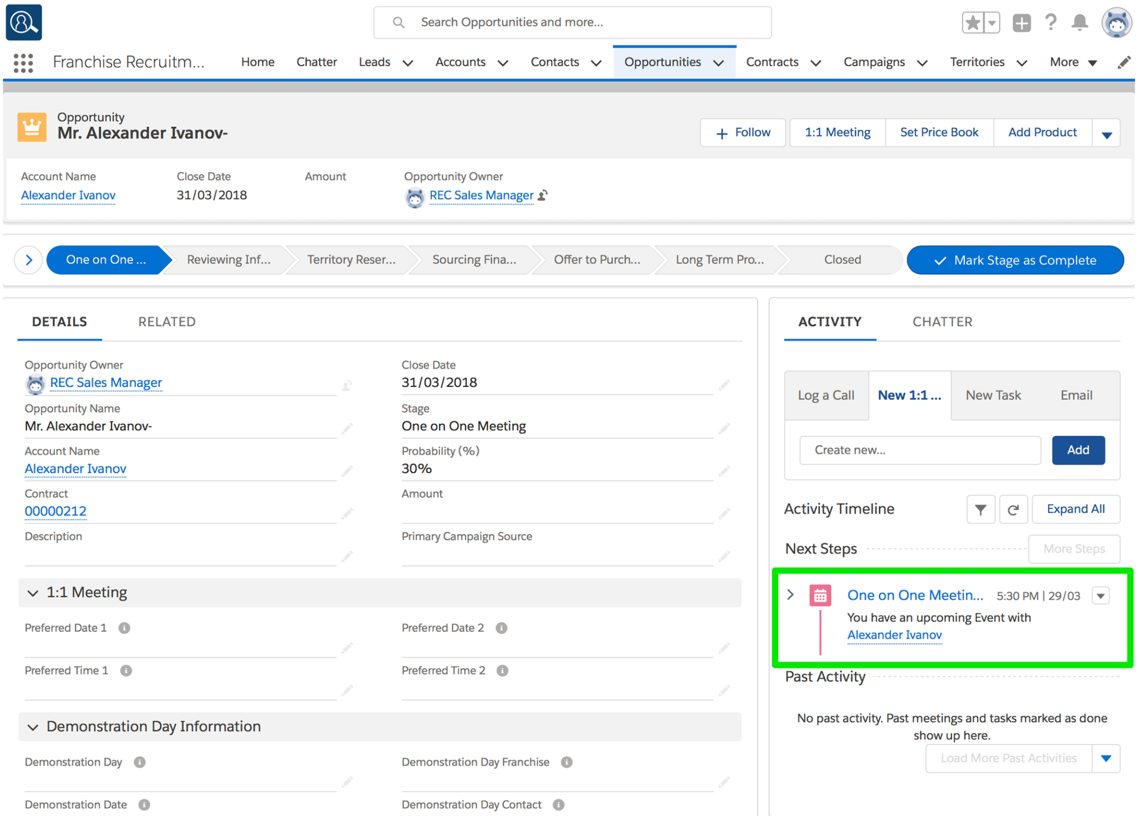
How to reschedule a one on one meeting

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

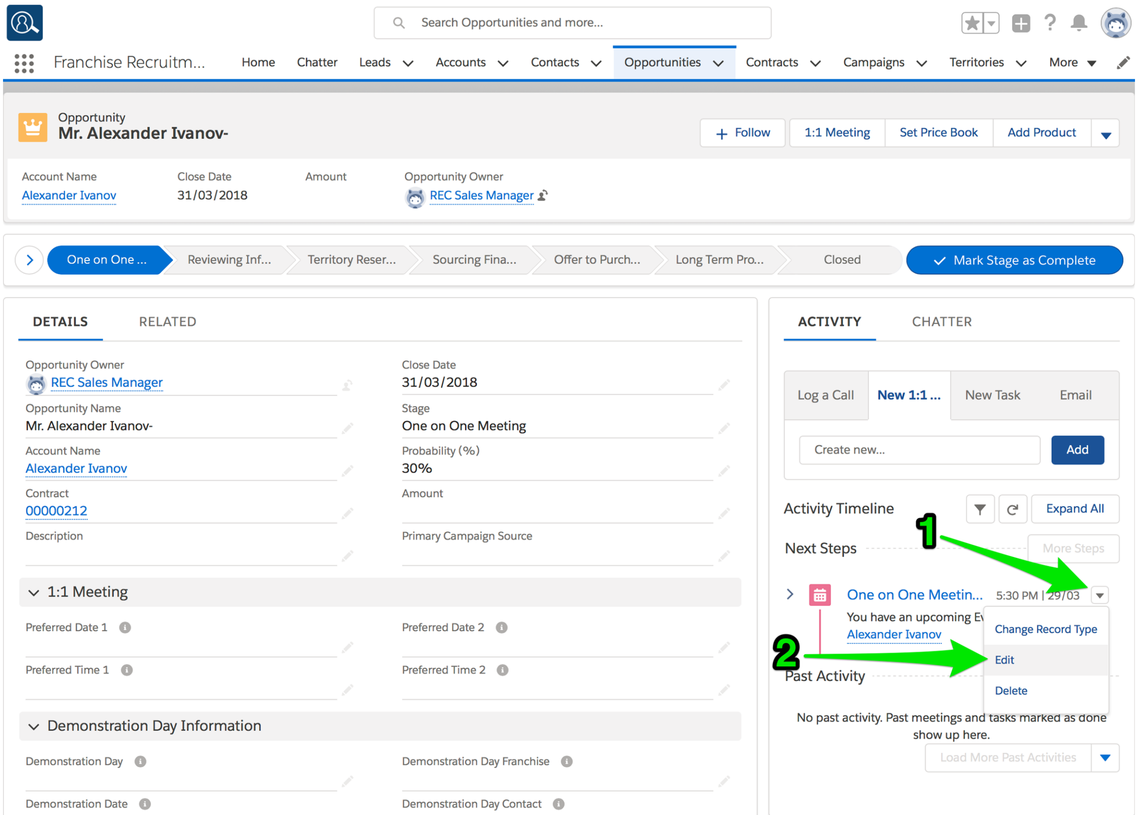
> To check the sales representative’s availability, How to check availability.

To reschedule a one on one meeting

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

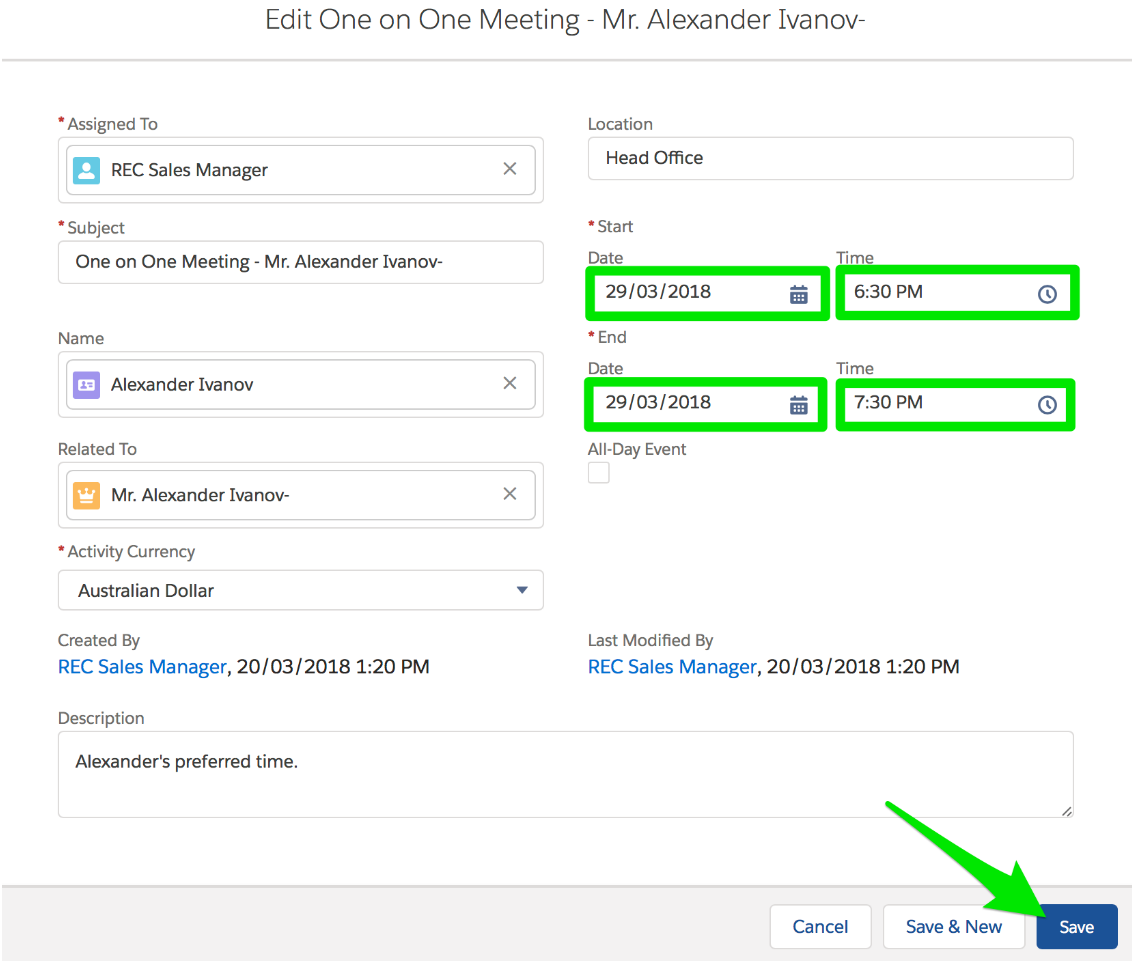


2. From the **Show more** button menu, select **Edit**.



The **Edit One on One Meeting** dialog box appears.

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



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

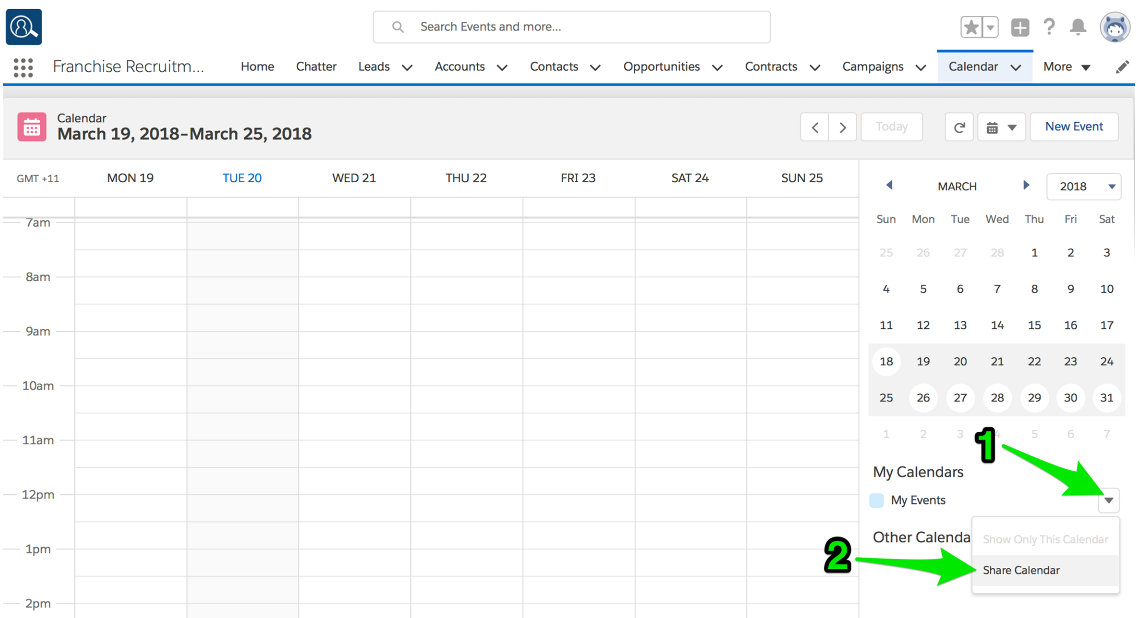
- Send an email confirming the agreed details, or
- Use an external calendaring application such as Google Calendar to send the meeting confirmation

How to share your calendar

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

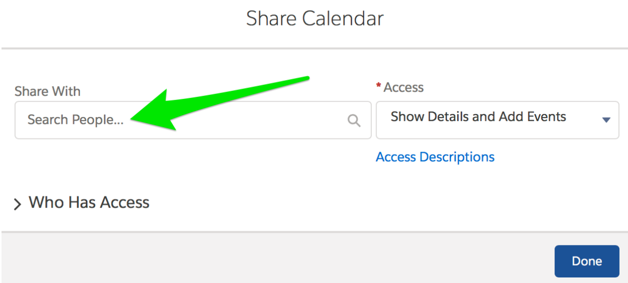
To allow other people to check your availability

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

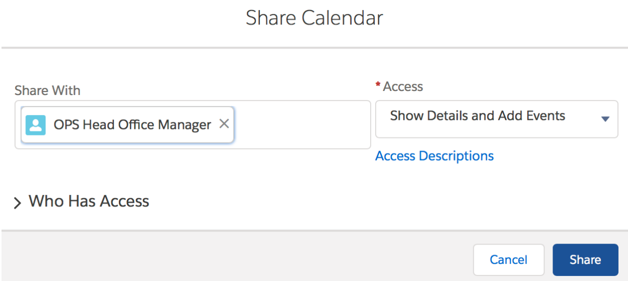


The **Share Calendar** dialog box appears.

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



3. Press **Share**.



You have now shared your calendar.

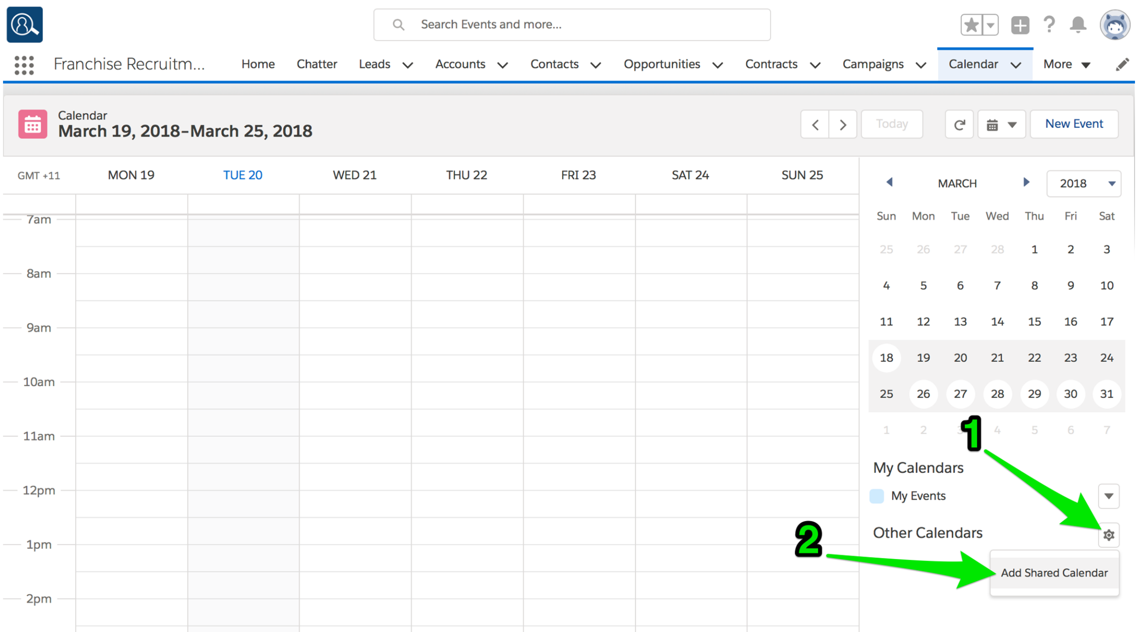
> You can check who you have shared your calendar with by selecting **Who Has Access** in the **Share Calendar** dialog box.

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.

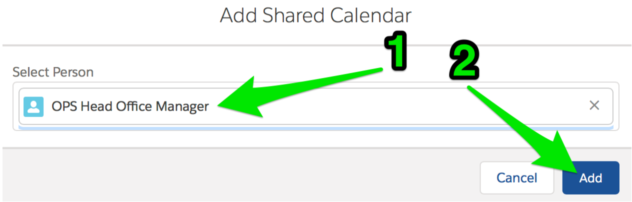
To view someone else's shared calendar

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

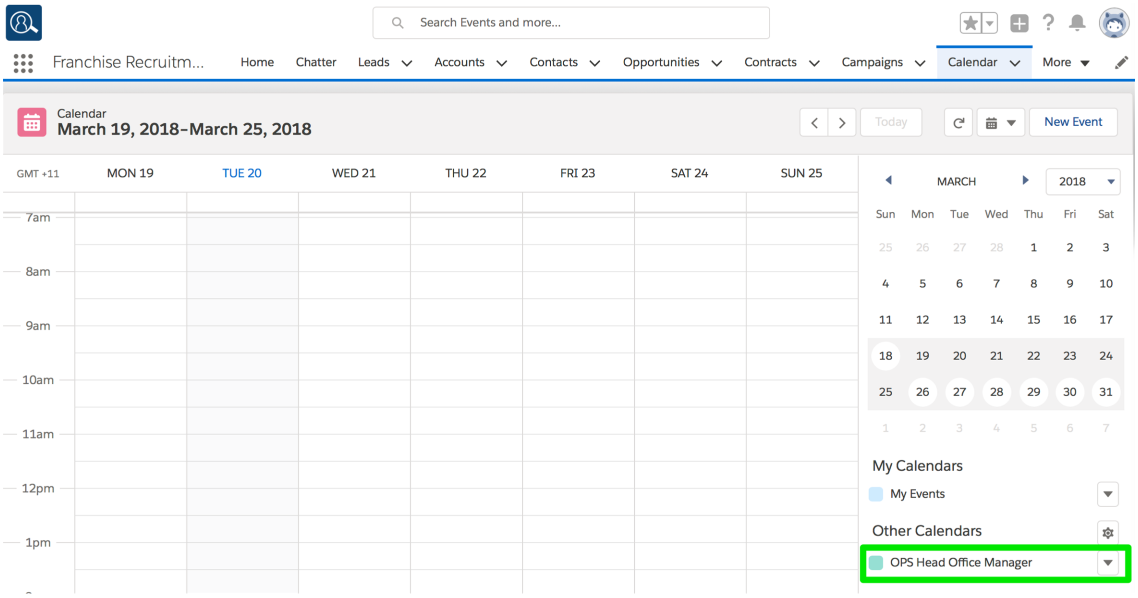


The **Add Shared Calendar** dialog box appears.

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.



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.

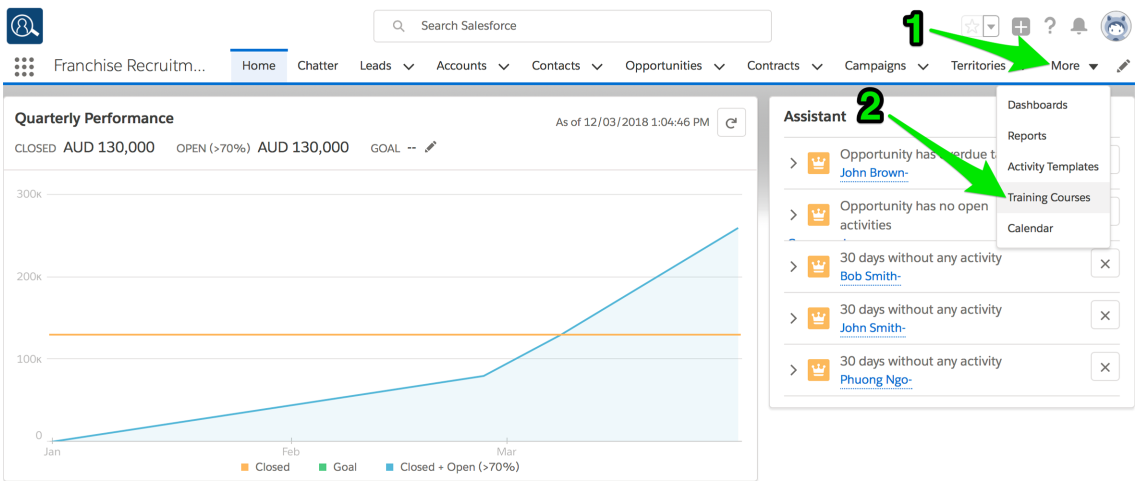
> Administrator privileges are required in order to create a training course. Once a training course is created, any user can book contacts into the training course.

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.

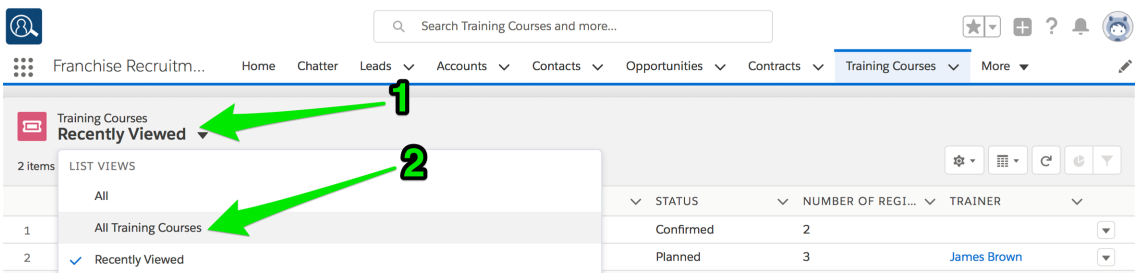
To enroll a contact in a training course

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

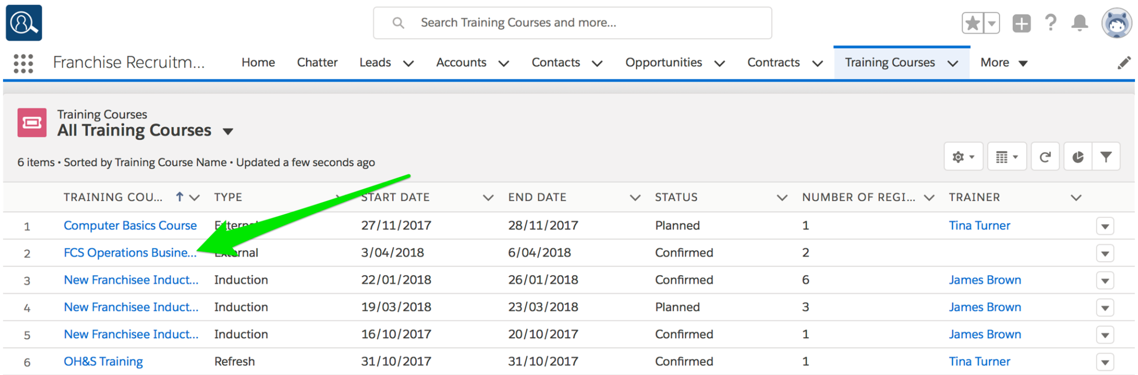


The **Training Courses** list appears.

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

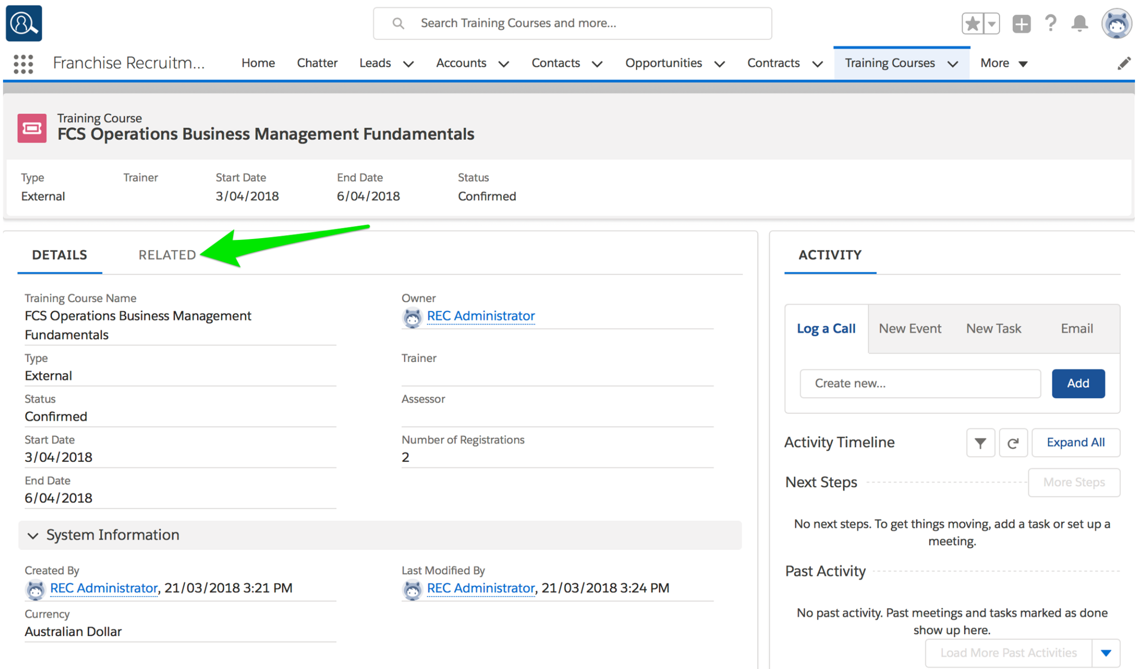


3. Select the desired training course.

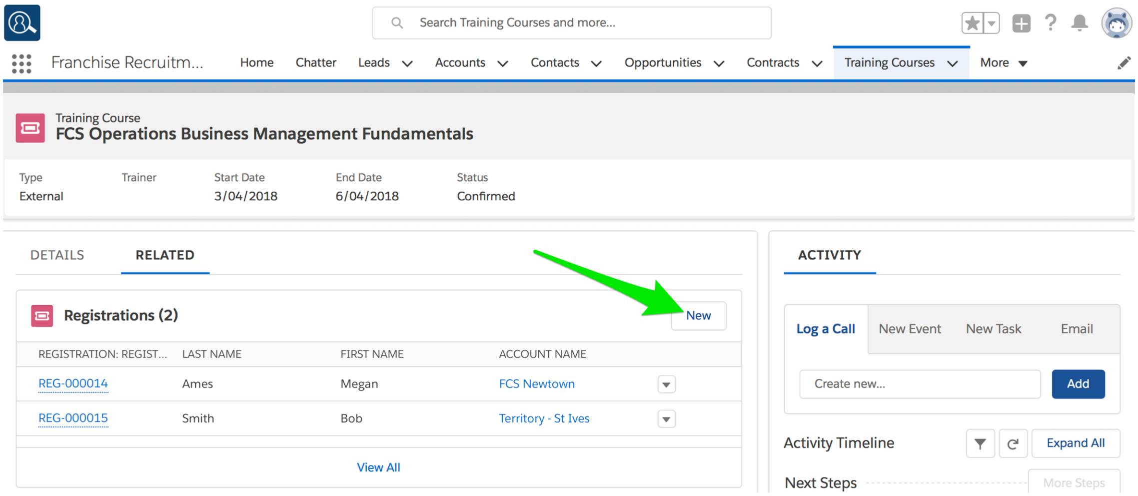


The selected **Training Course** opens.

4. Select **Related**.

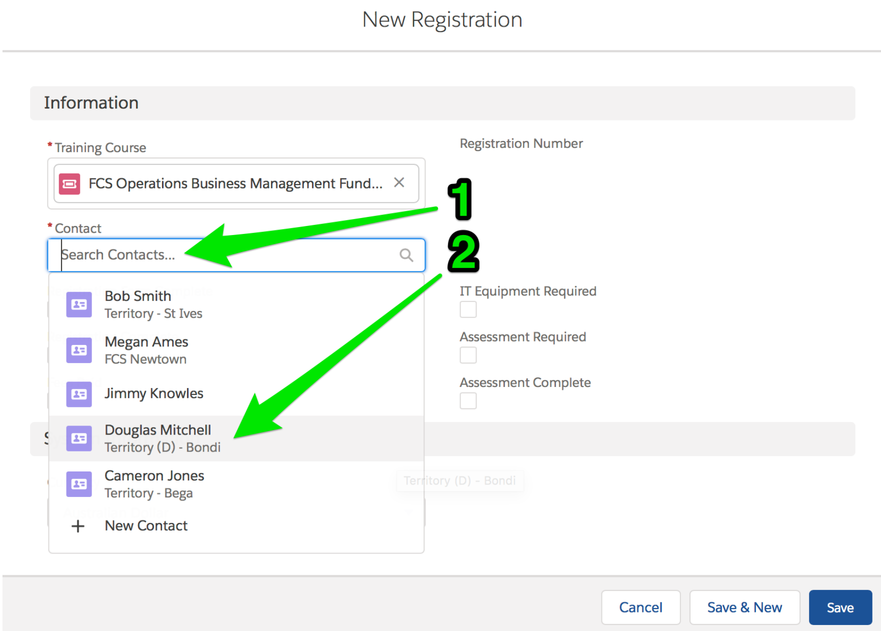


5. From the **Registrations** list, press **New**.

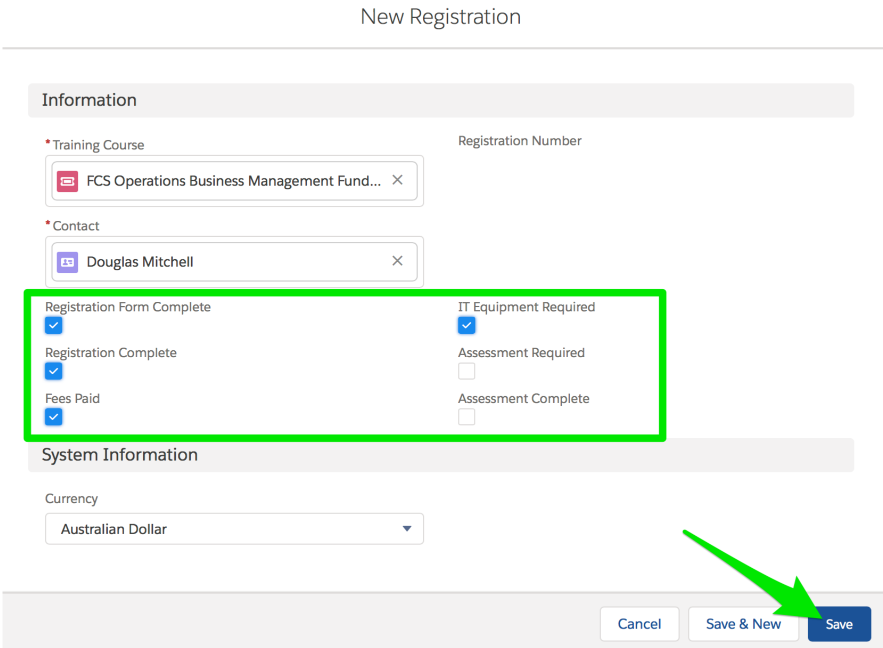


The **New Registration** dialog box appears.

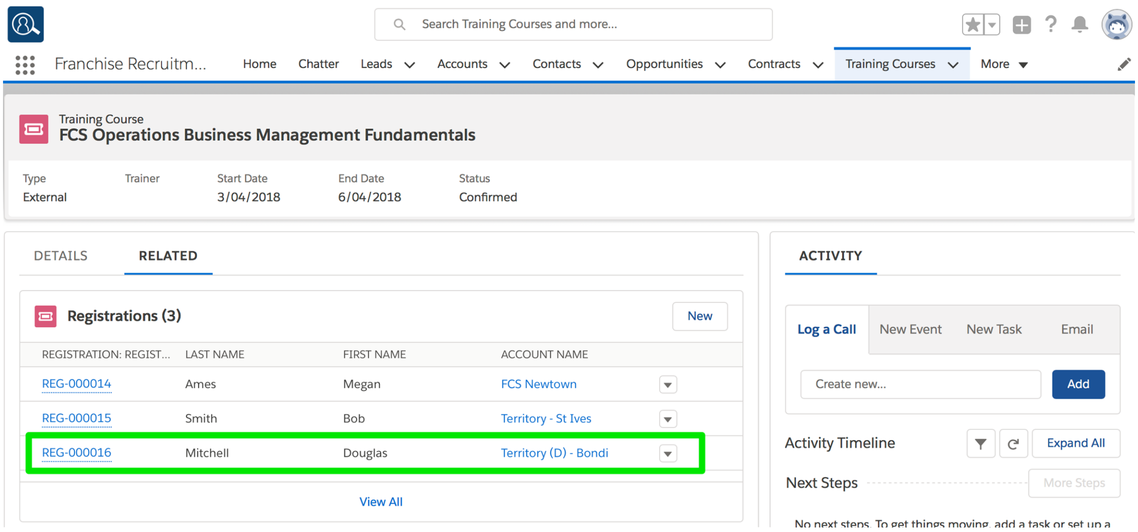
6. Search or select from the list to add the `Contact`.



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



The contact is now registered for the course.



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

CHAPTER 8

Customer Communications

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.

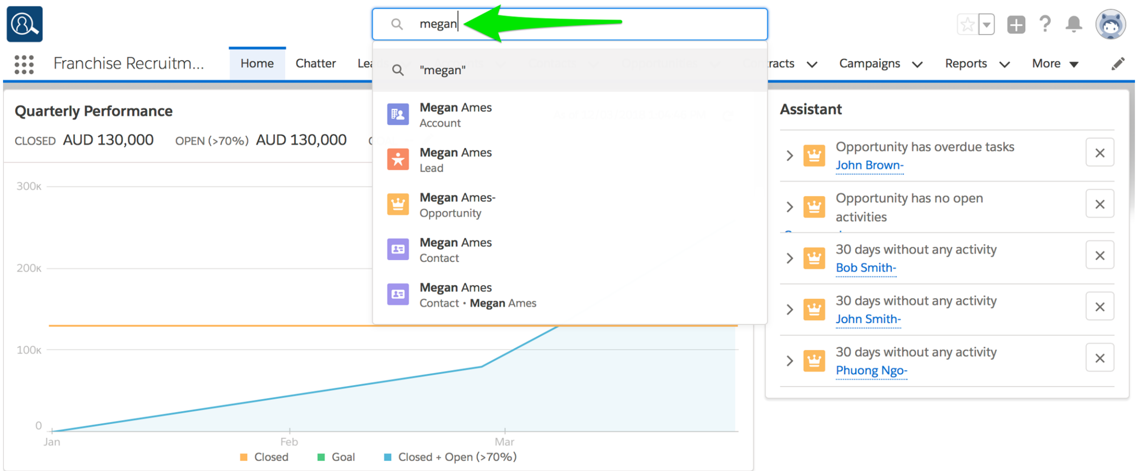
> When recording new leads over the phone, *See* "Manually created leads" on page 48.

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.

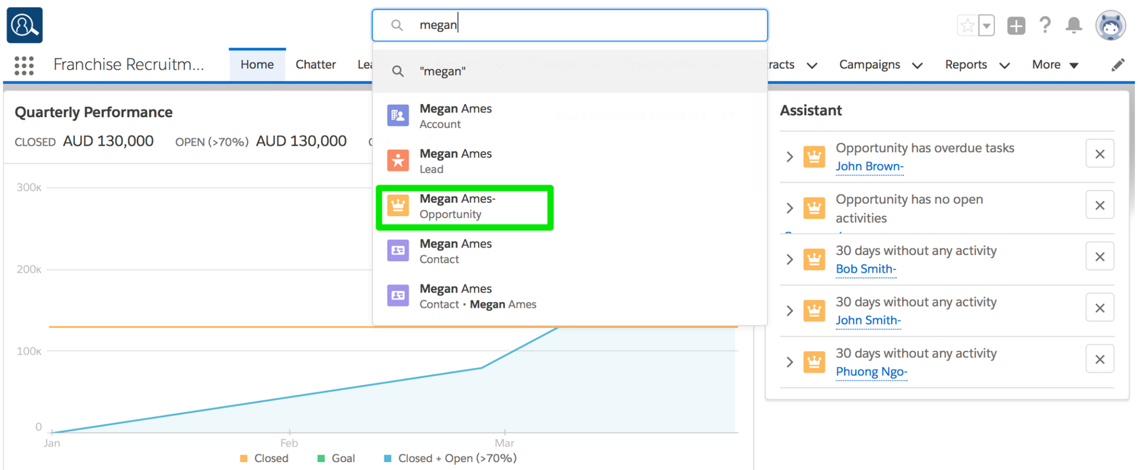
To locate a person's record

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

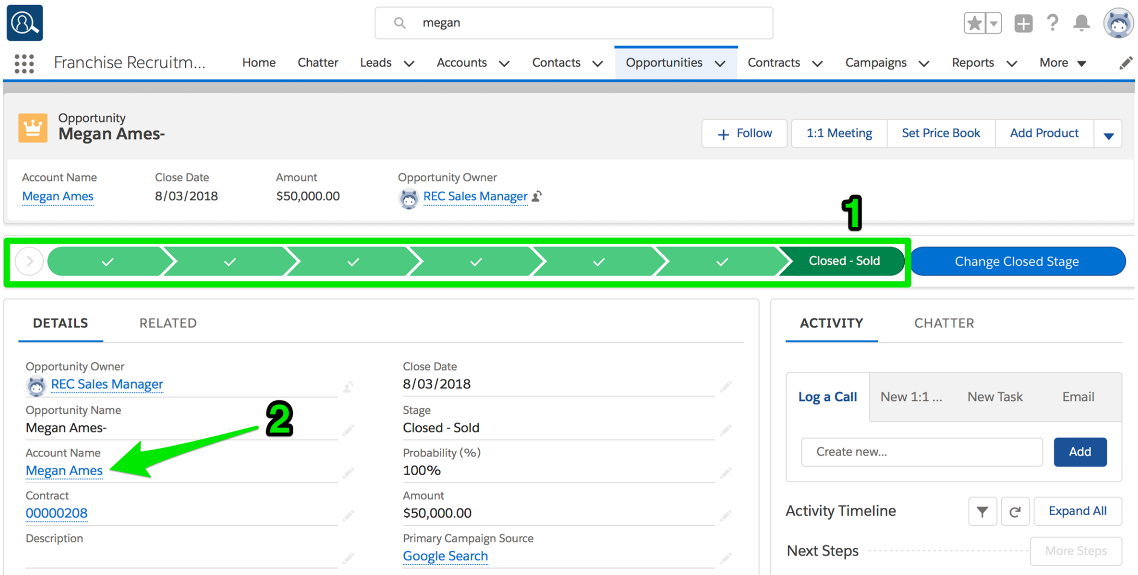


Salesforce displays a list of records that match the name you entered. The type of each record is displayed.

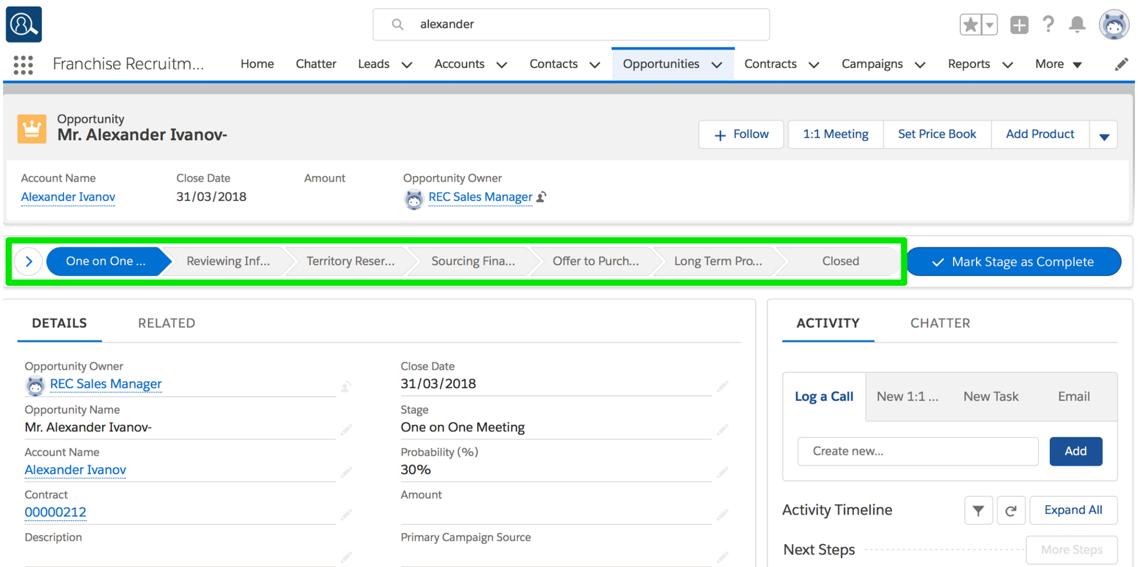
2. If there is an **Opportunity** record, try that one first. Select the **Opportunity**.



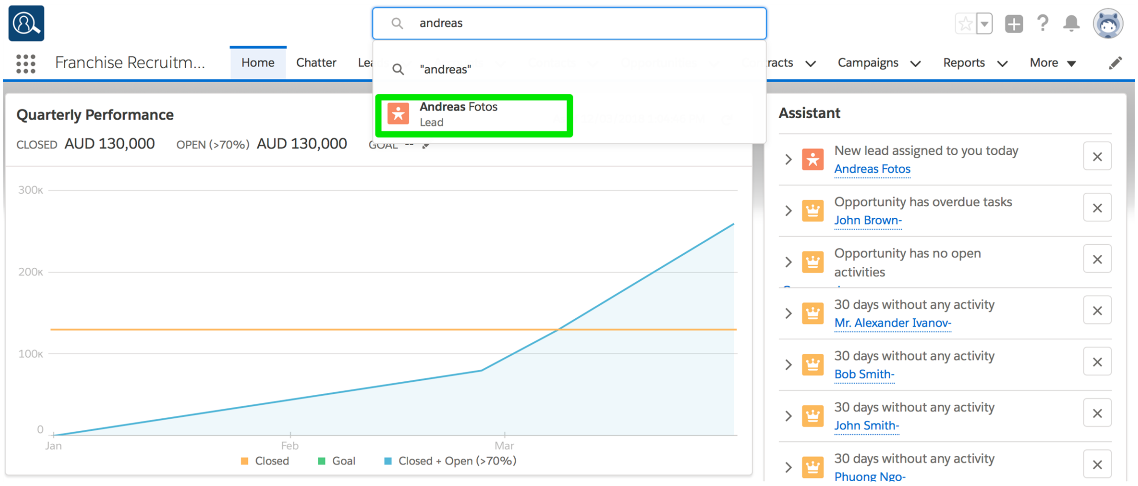
3. Check the Opportunity stage. If the Opportunity stage is closed, then click on the `Account Name` link and record the information in the related Account.



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



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



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

Just double-check you're not misspelling their name.

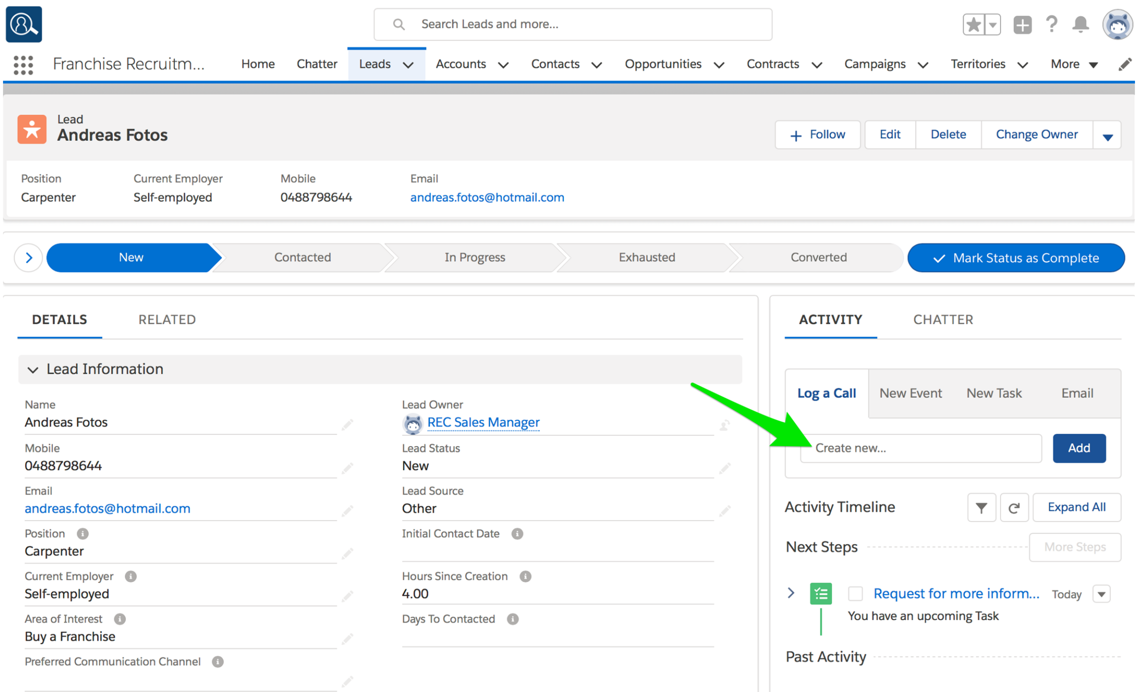
To enter new customers, *See* "Manually created leads" on page 48.

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.

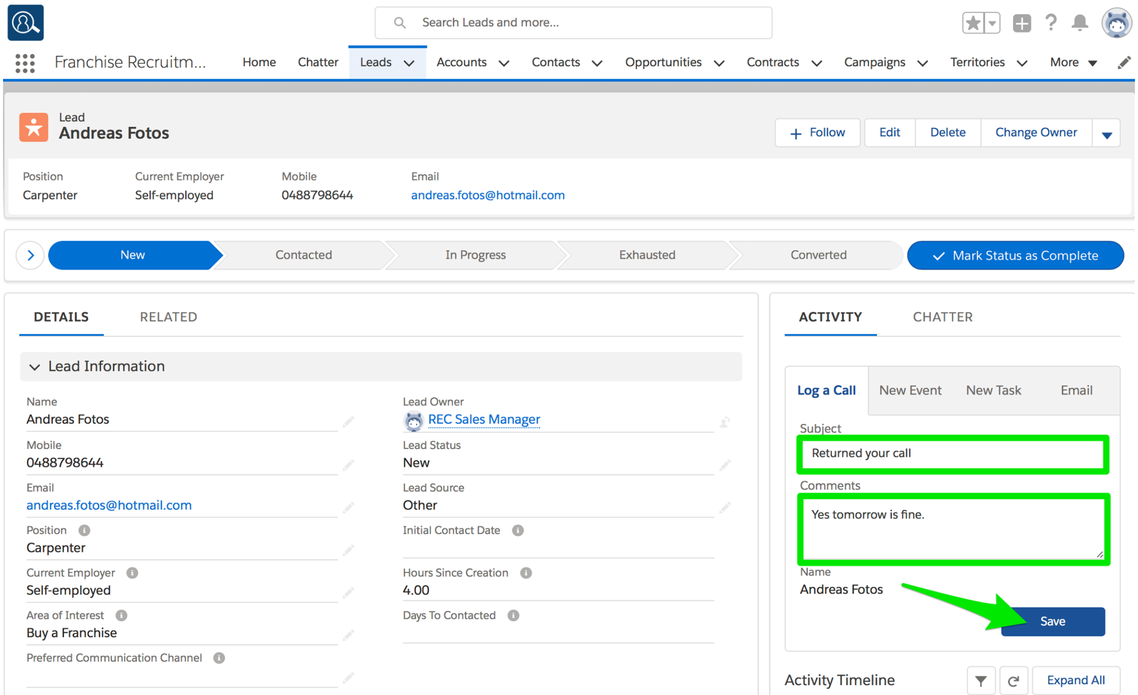
To record information

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…**

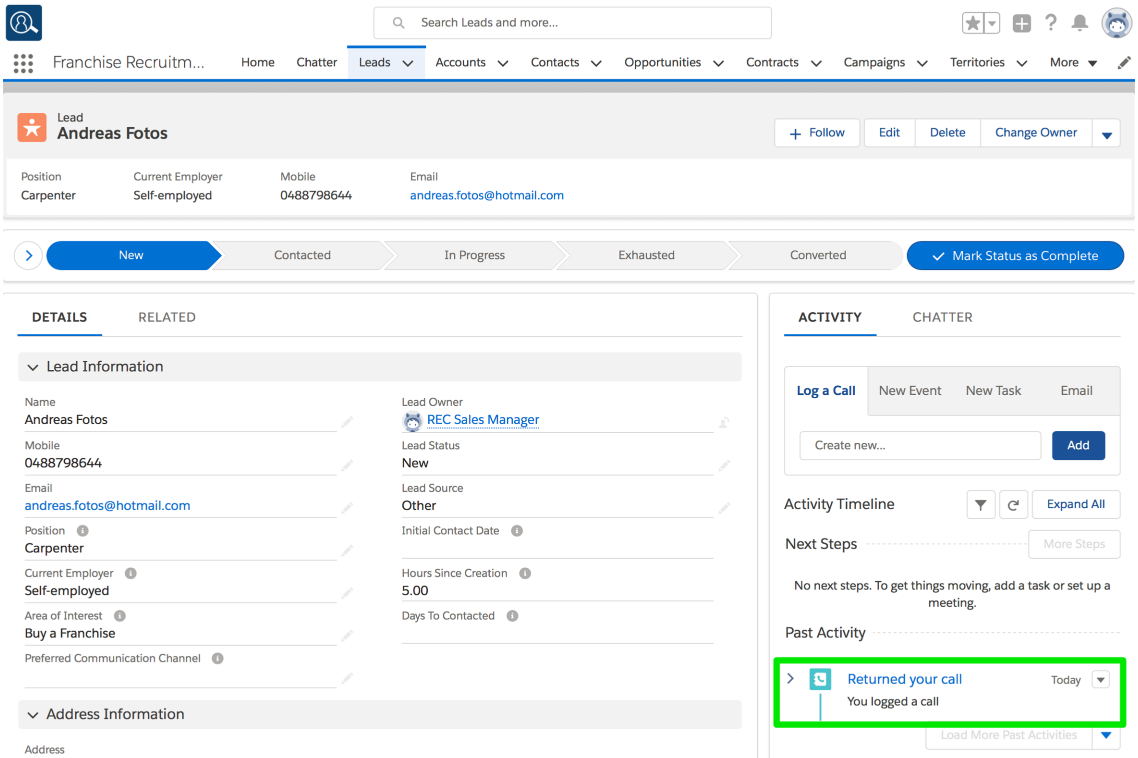


The **Log a Call** activity pane displays.

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



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



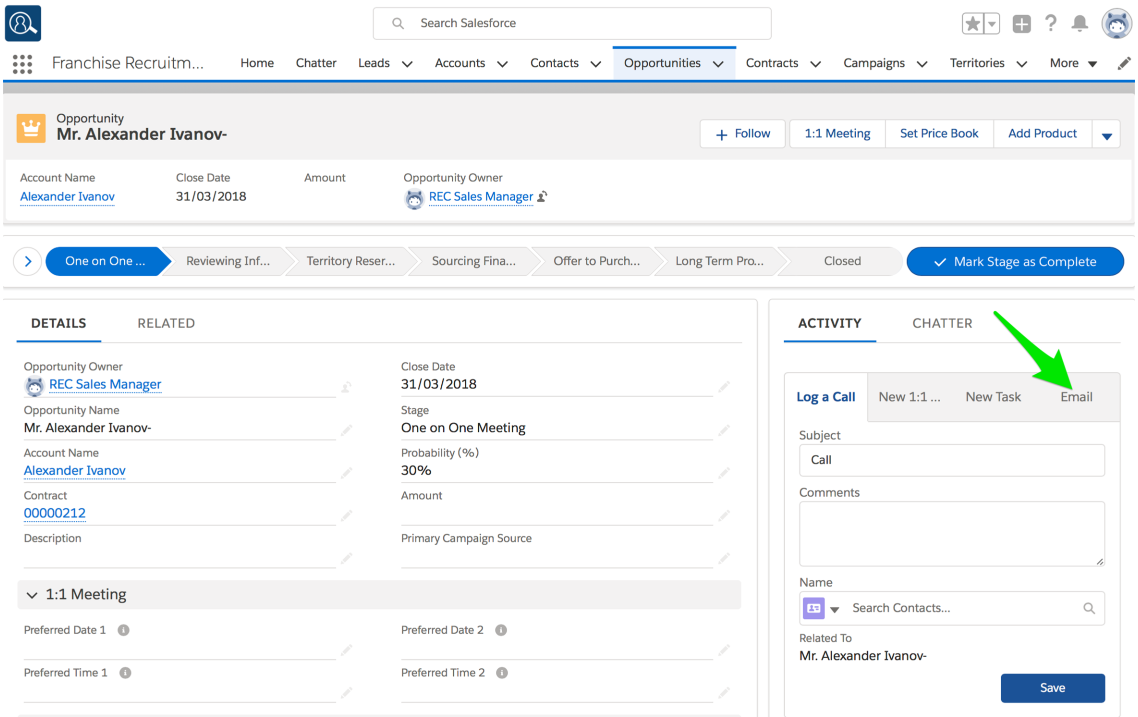
How to send an email

Salesforce allows you to send an email to the 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.

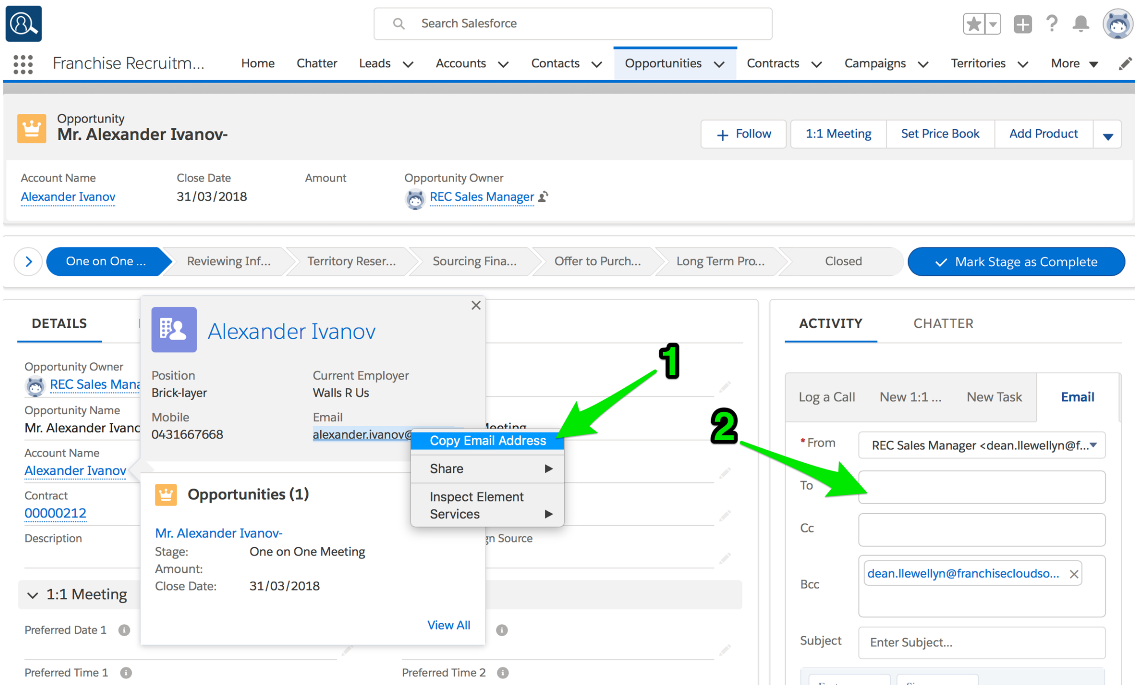
To send an email

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.

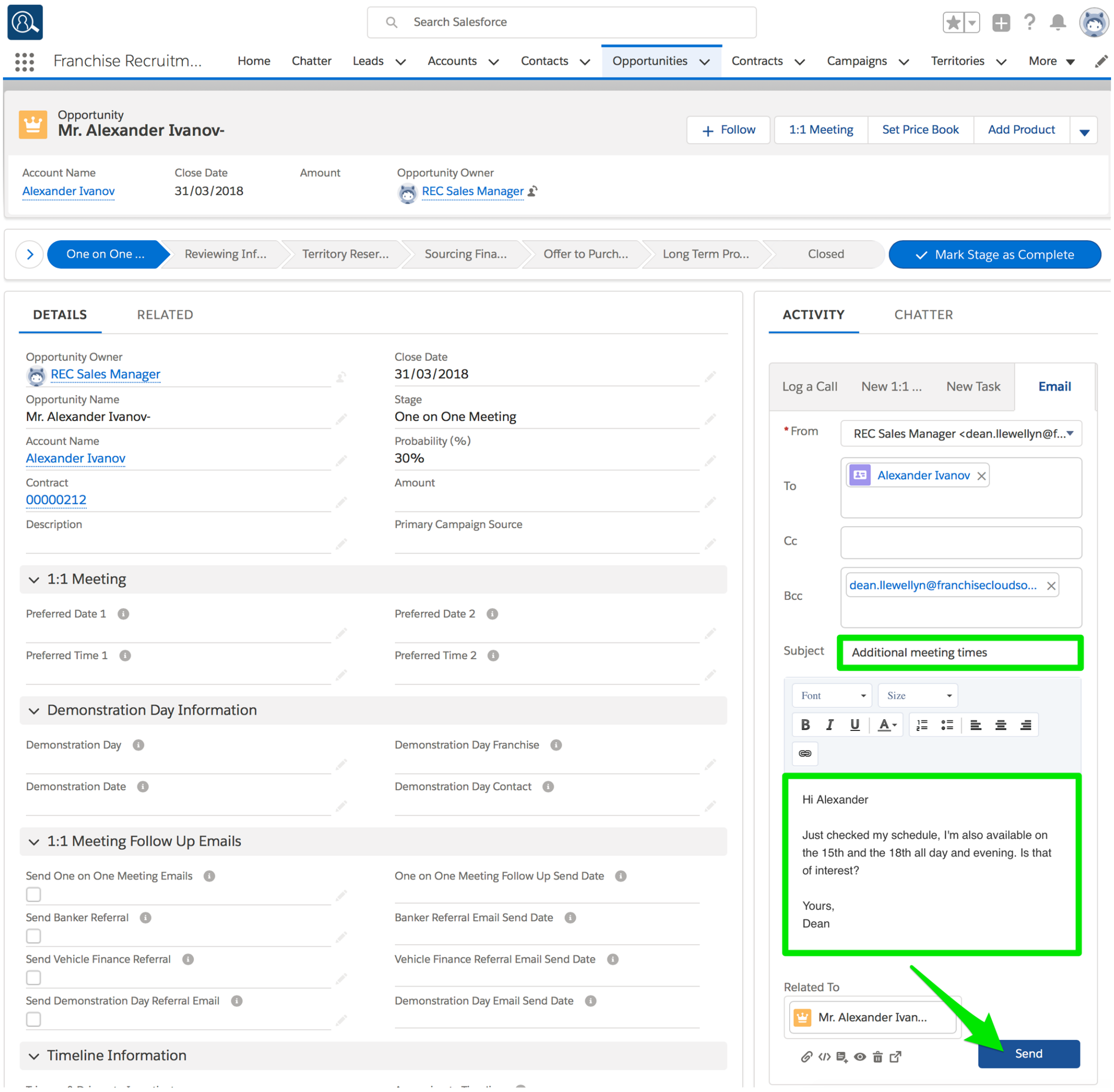


The **Email** tab displays, and shows the owner of the record in the `From` address.

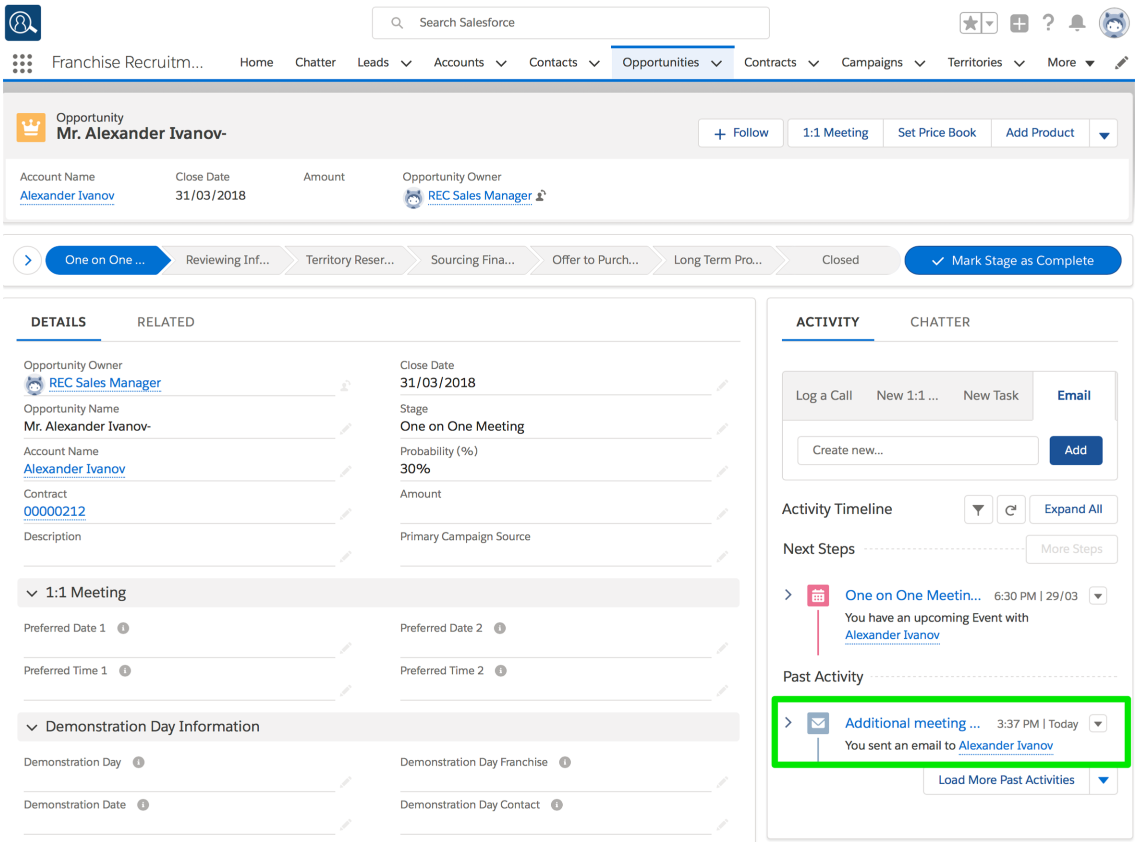
3. Copy the email address from `Account Name` and paste it into the `To` field.



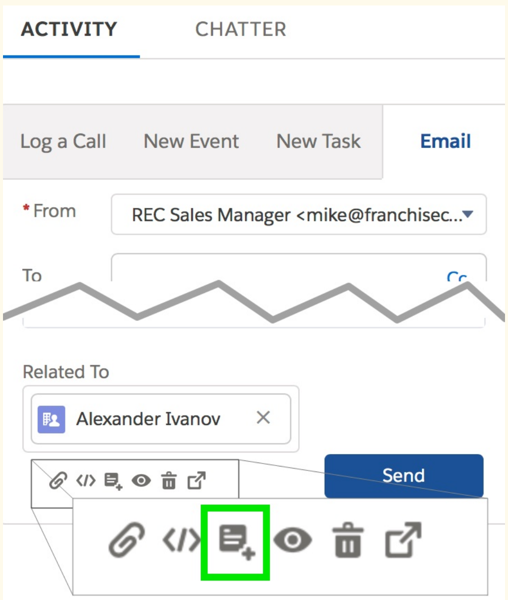
4. Complete `Subject` and `Details` then press **Send**.



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



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



How to confirm a scheduled appointment with a 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.

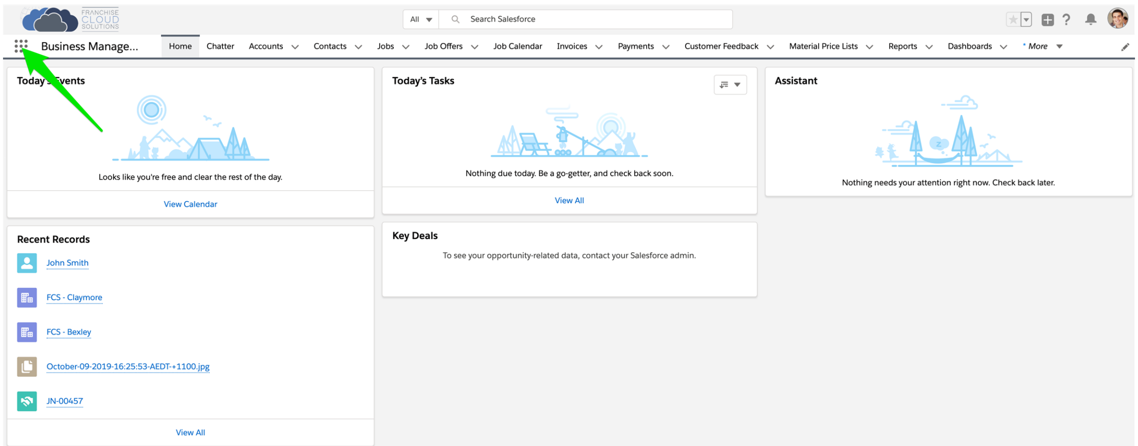
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.

How to review email template headers and footers

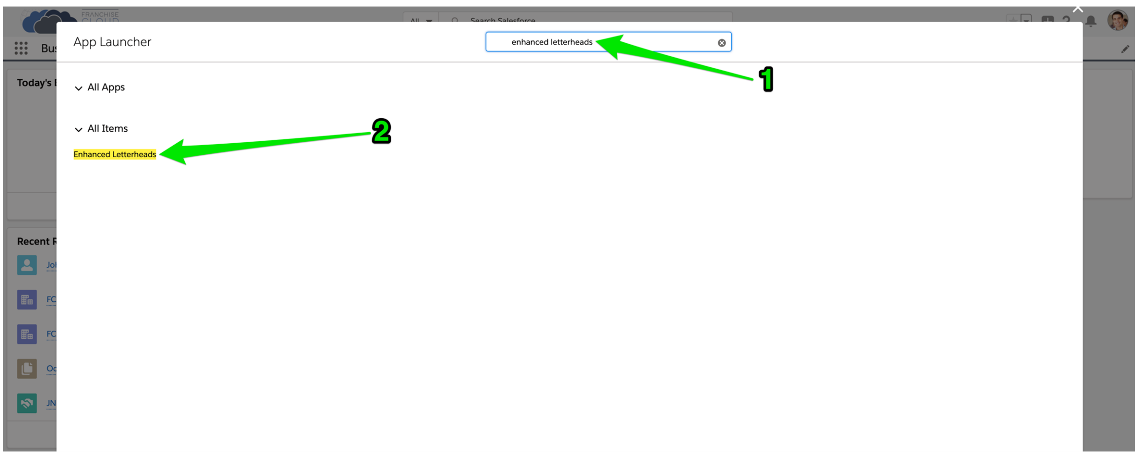
Most likely your franchisor will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

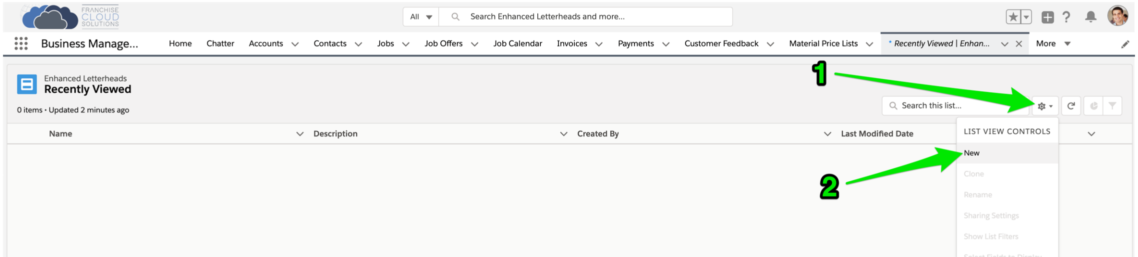
1. Open the **App Launcher**.



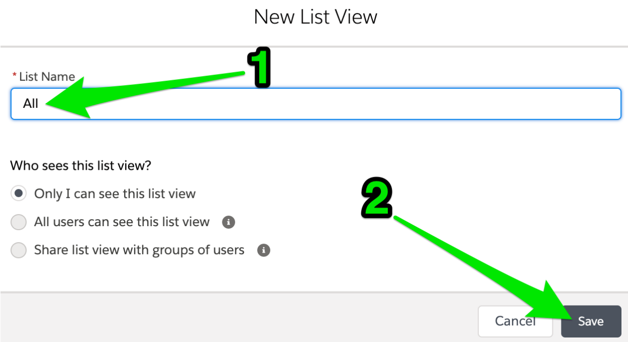
2. In the **App Launcher** `Search` box, enter *`enhanced letterheads`* and select the **Enhanced Letterheads** link.



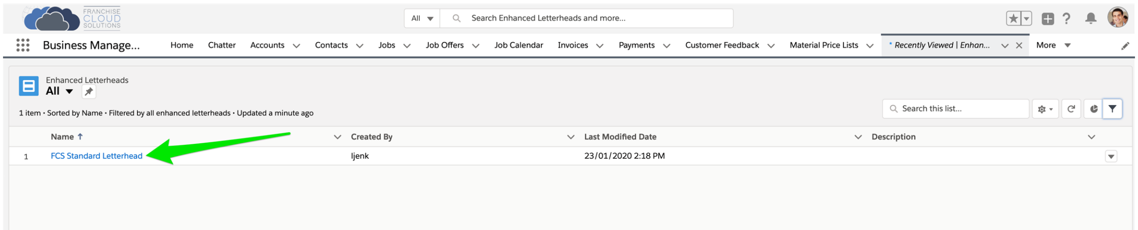
3. You may see an empty **Enhanced Letterheads** list. To see any of the letterheads, create a **New** list view.



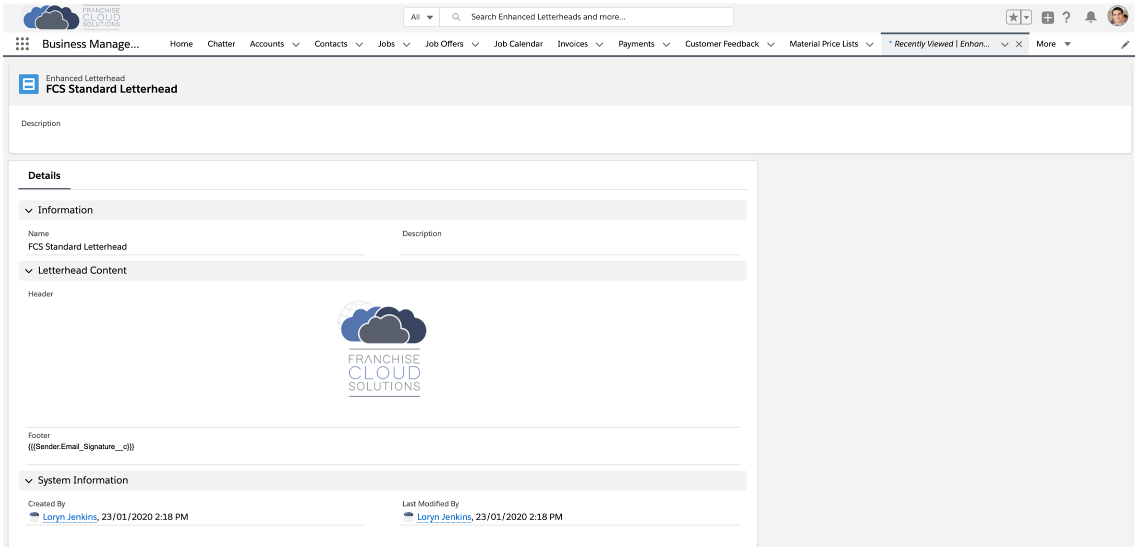
4. Name the list view and press **Save**.

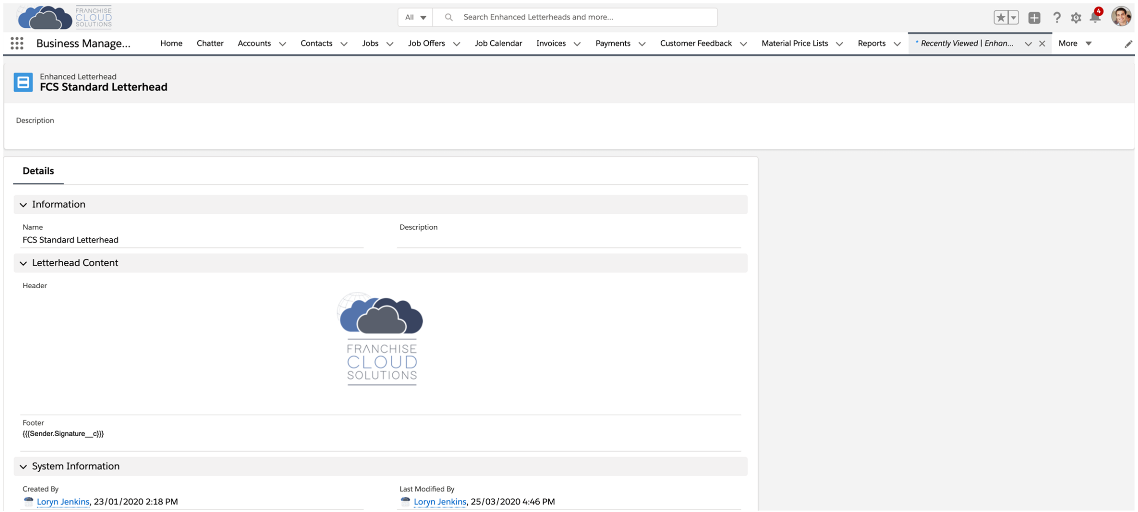


5. Now select the Standard Letterhead.



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





If you would like a change to the Standard Letterhead, speak to your field manager or system administrator.

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

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

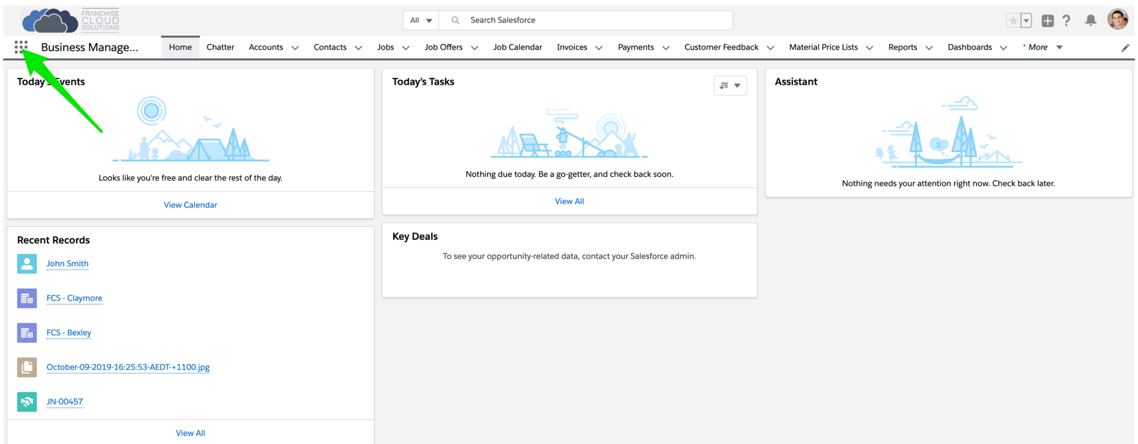
Custom email templates allow you to produce professional email communications for each standard customer touch-point. They often consist of

- 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

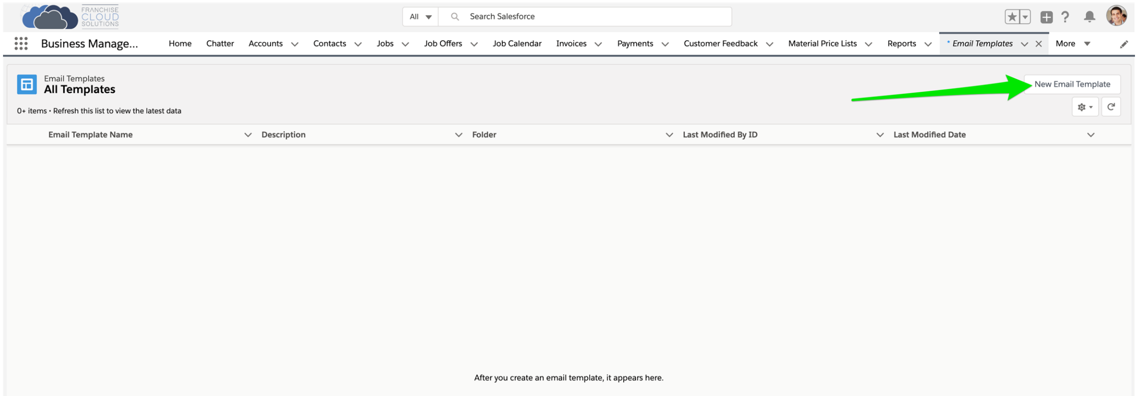
To create a custom email template

1. Open the **App Launcher**.

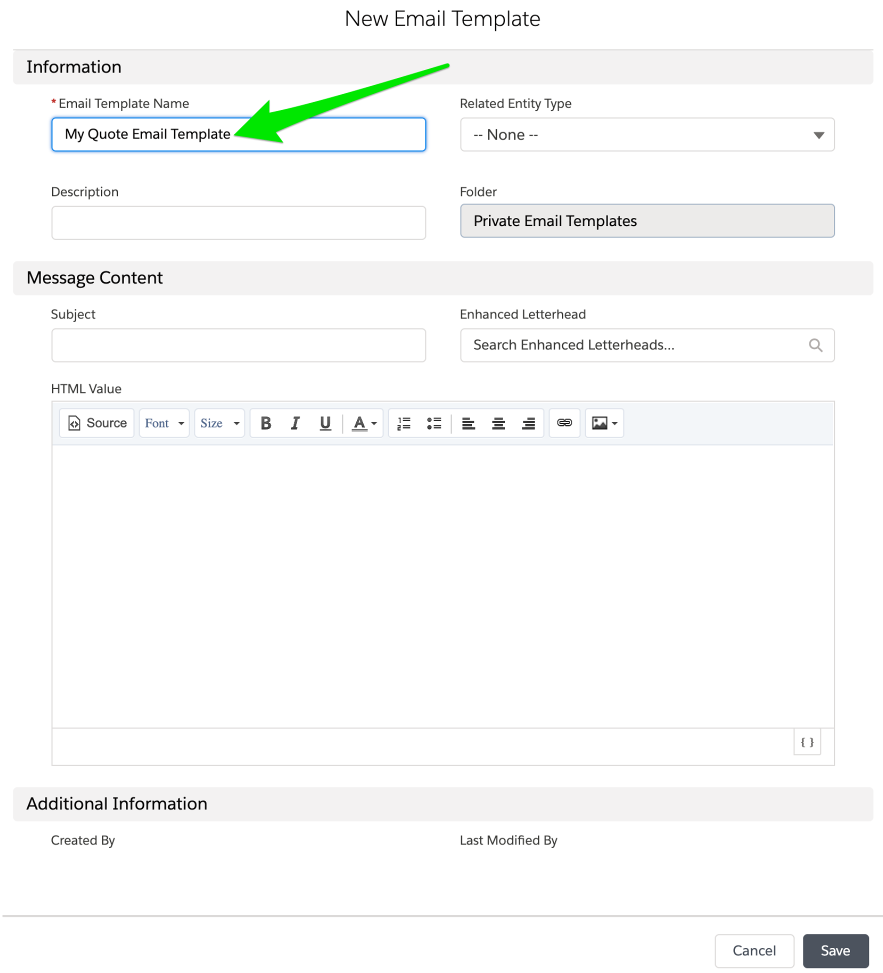


2. In the **App Launcher** `Search` box, enter *`email templates`* and select the **Email Templates** link.

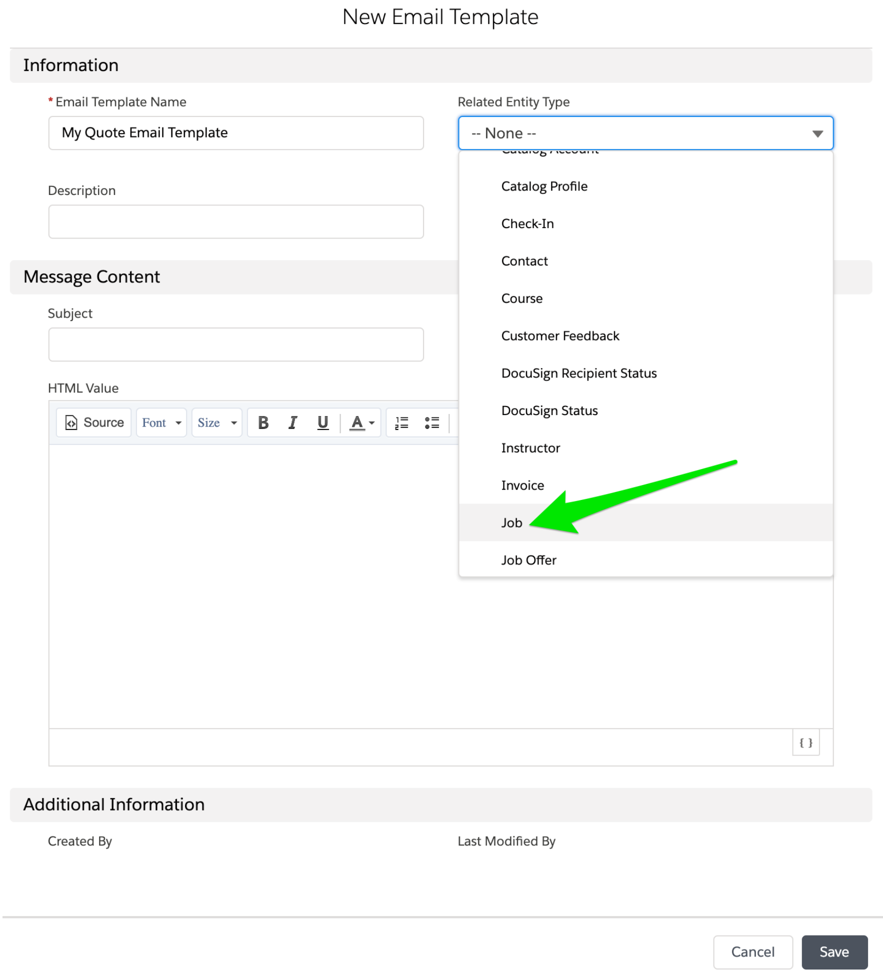
3. You may see an empty **Email Templates** list. Press **New Email Template**.



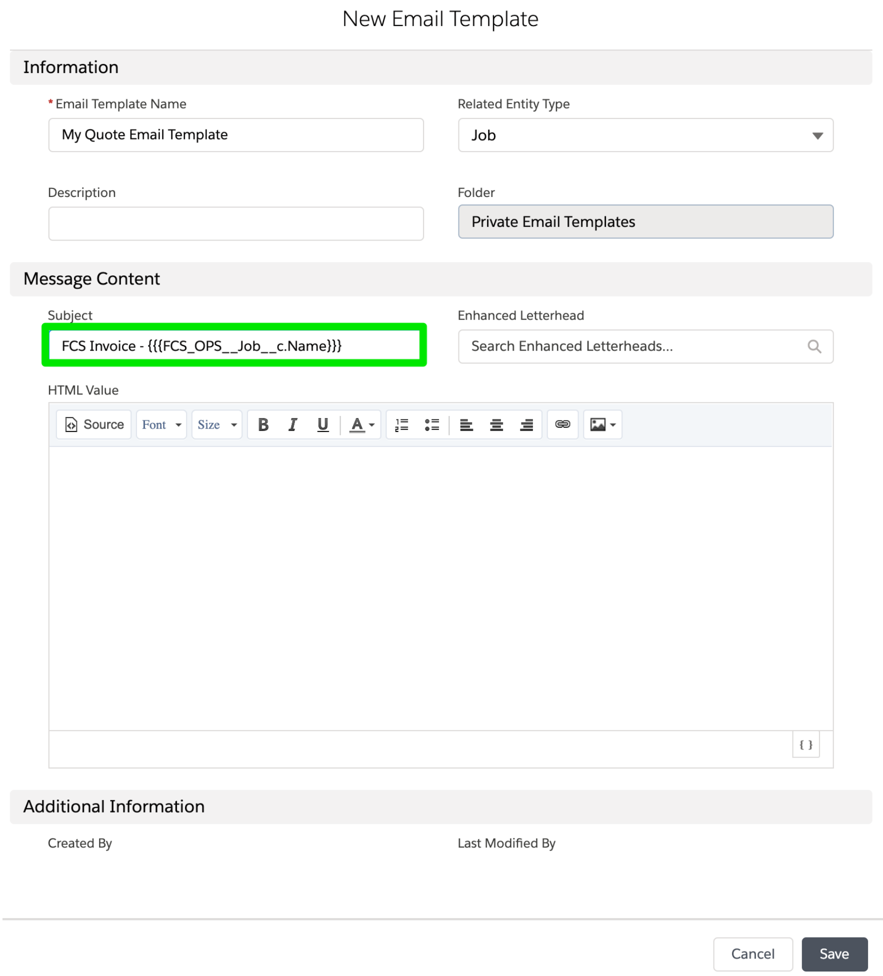
4. Insert an email template name that will help you identify it.



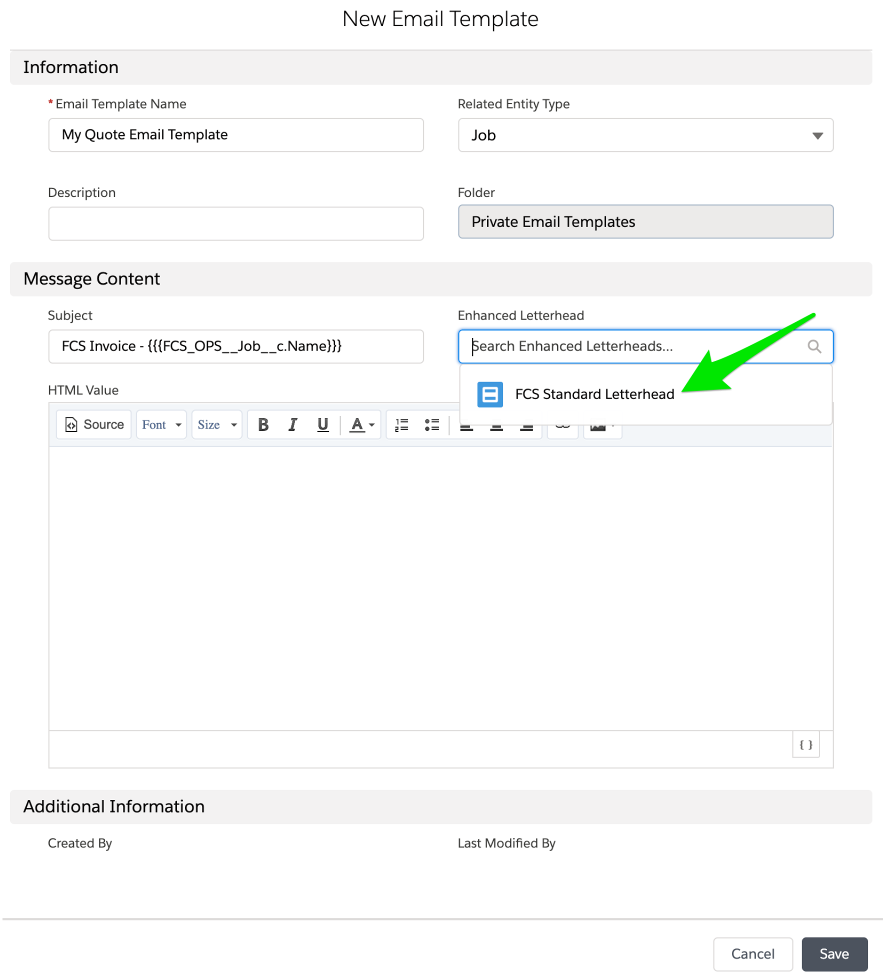
5. If you are going to use merge fields, you must base the email template off a particular entity type. Leads should be based on Lead.



6. Enter an email subject line.

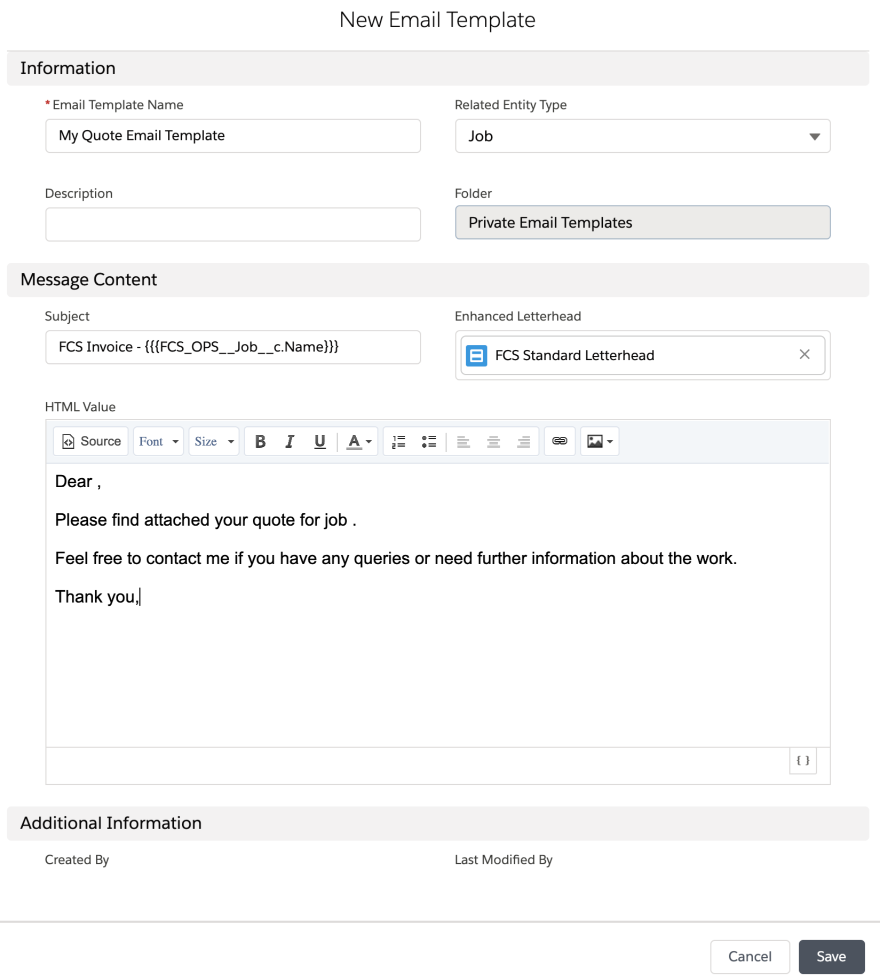


7. Select an appropriate letterhead.

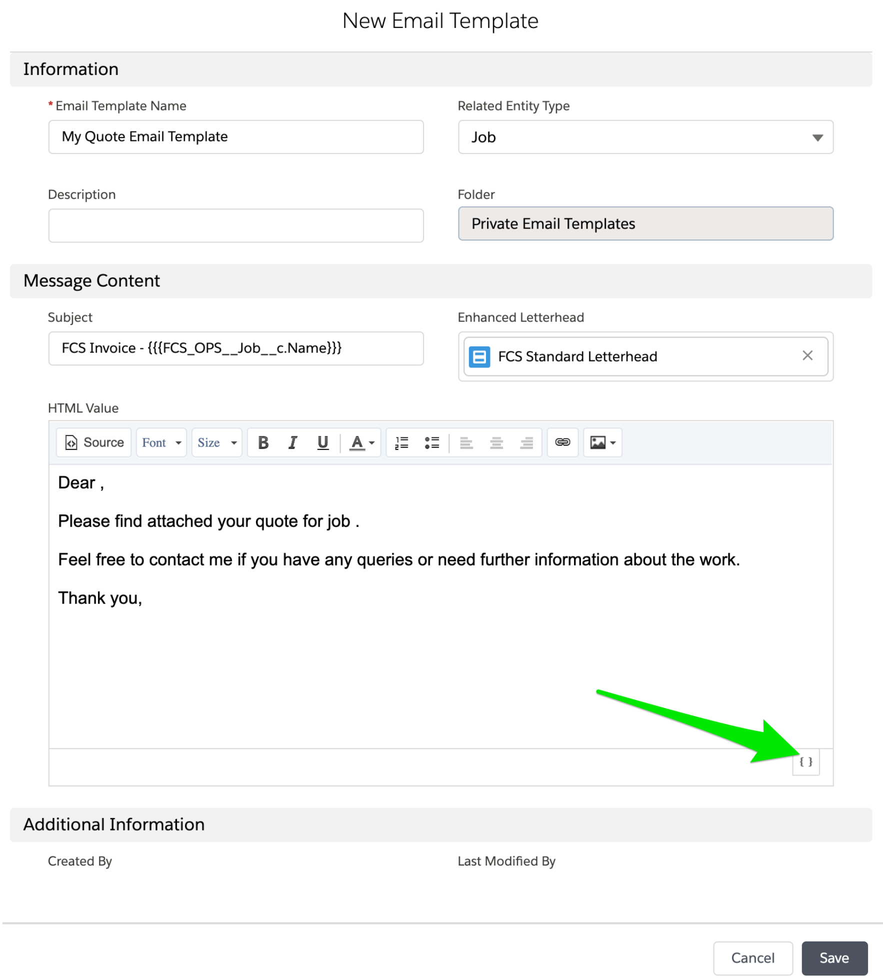


You can review the available letterheads. *See* "How to review email template headers and footers" on page 198.

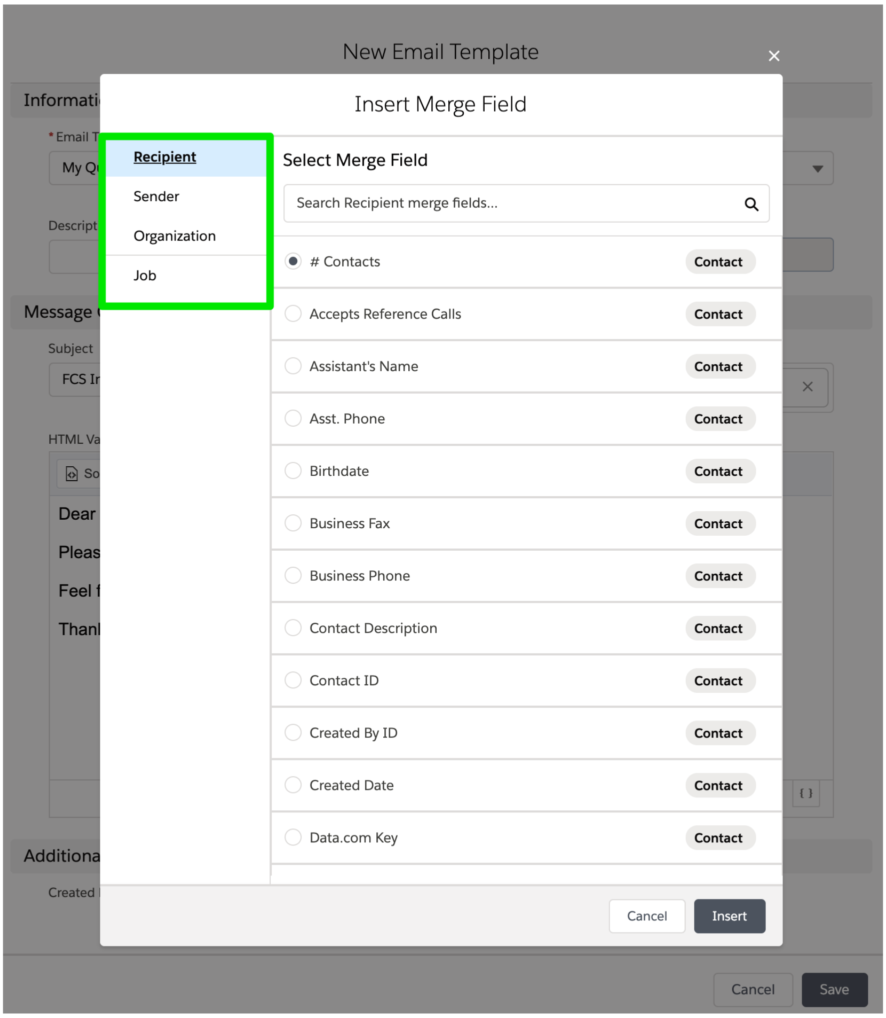
8. Enter boilerplate text into the `HTML Value` field.



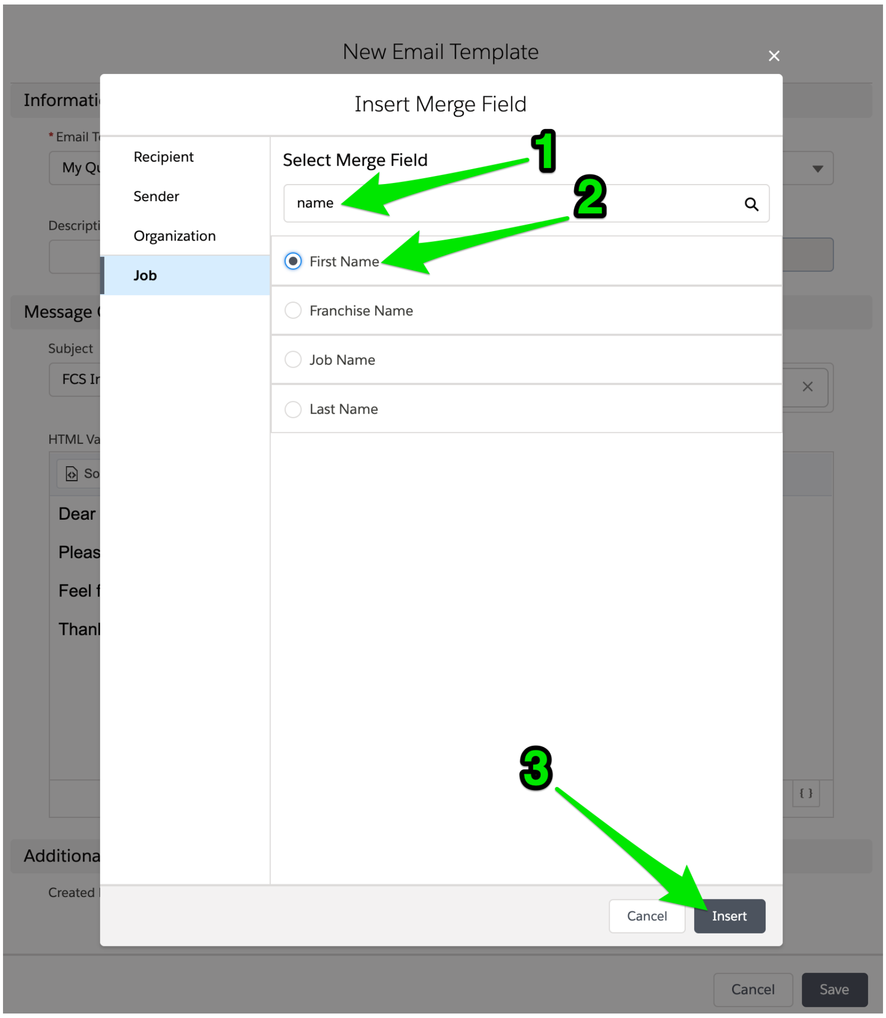
9. To insert variables into the email template body, press the **Insert Merge Field** button (i.e. the brace button { }).



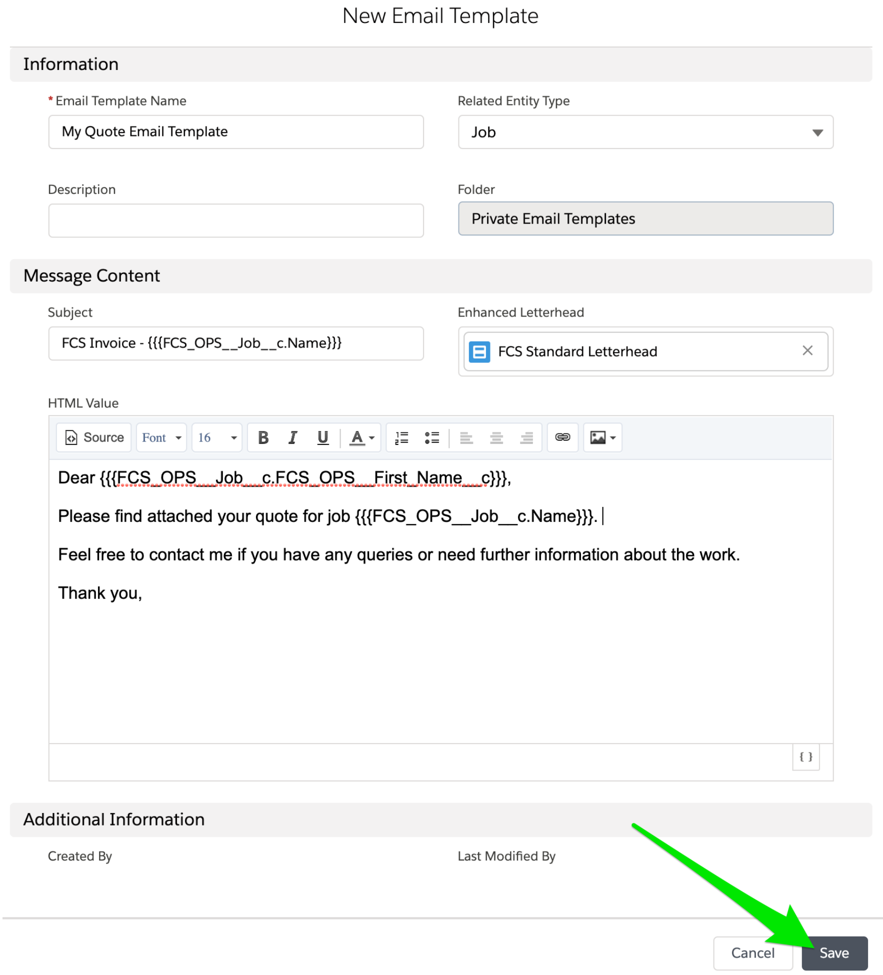
10. Select the Object Reference. Sometimes you might reference yourself (Sender) or your organization (Organization).



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



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



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

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.

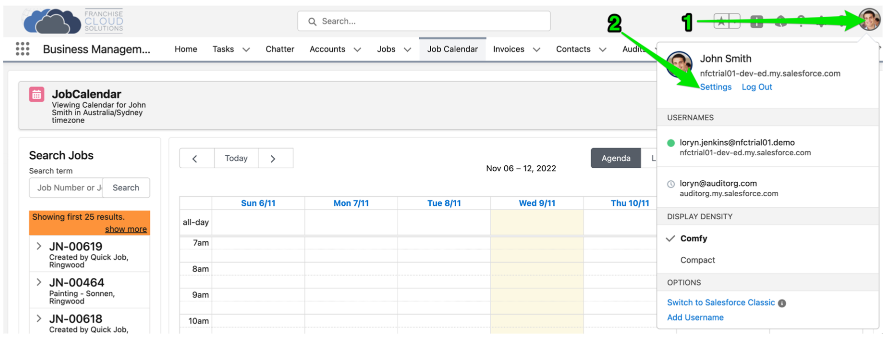
- "Configure My Email to Salesforce" on page 231
- "Log emails using My Email to Salesforce" on page 233

How to send all emails to my inbox

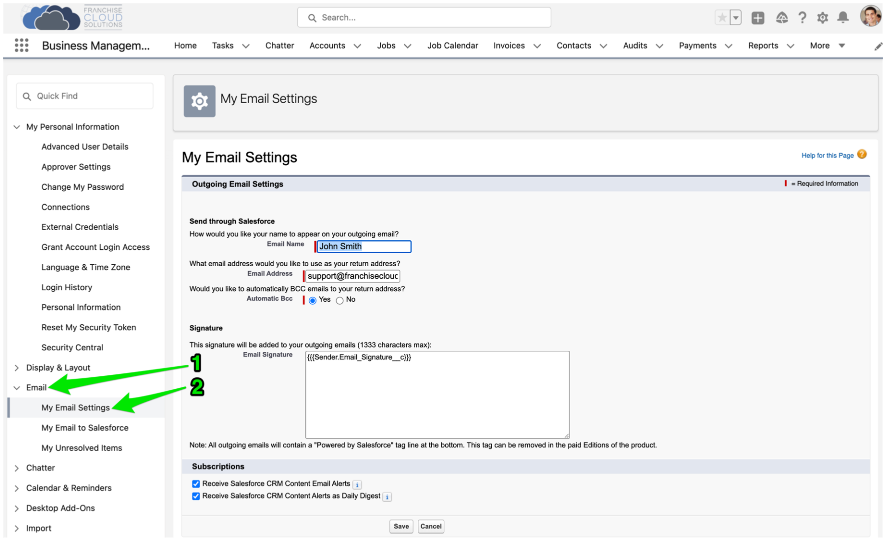
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

To blind copy all emails to your email address

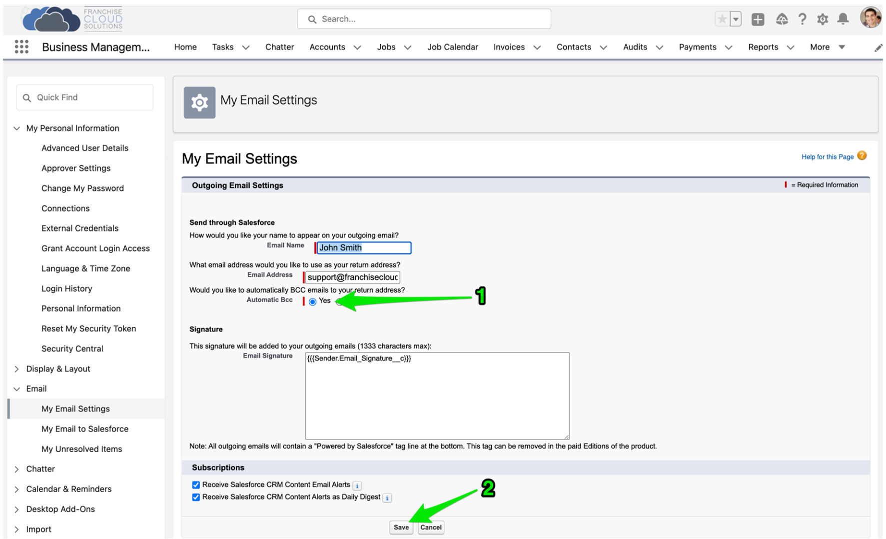
1. Go to **View Profile** and choose **Settings**.



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



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



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

Granting EAC sync permission

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

Before you agree, you should understand whether your administrator

- is syncing emails, events, and contacts, or
- is syncing events and contacts only

If you agree to using EAC, you can choose whether captured records are visible to

- only you, or
- a defined group of users (i.e. users who belong to specific groups), or
- everyone who can view the records you have access to

Installing the Salesforce extension for Office 365

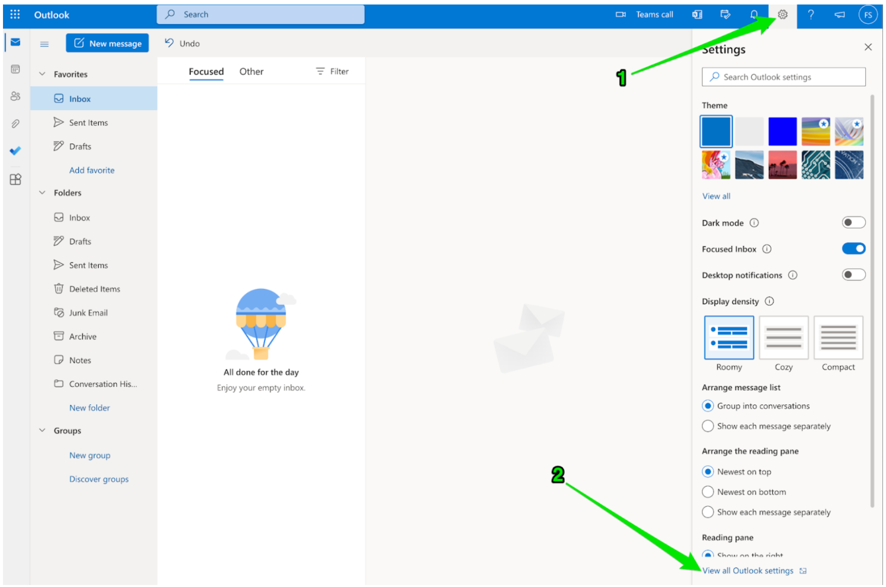
The Salesforce extension for Office 365 provides you control as to

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

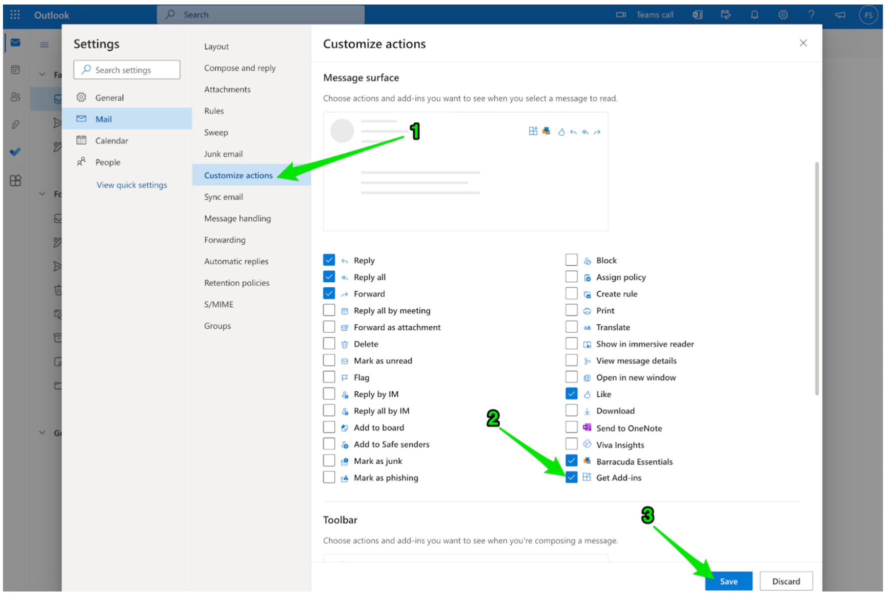
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

To install the Salesforce extension for Office 365

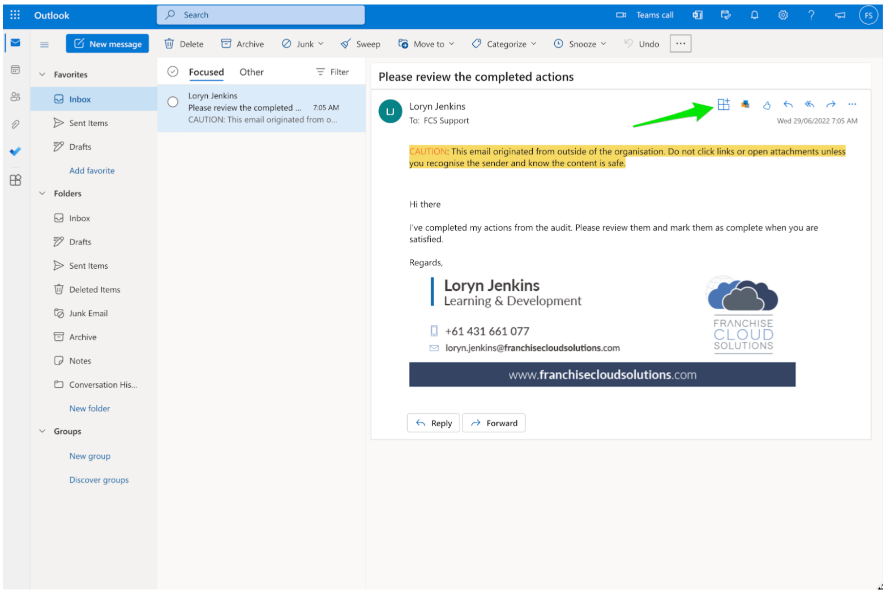
1. From **Outlook 365**, select the **Settings** menu and choose to **View all Outlook Settings**.



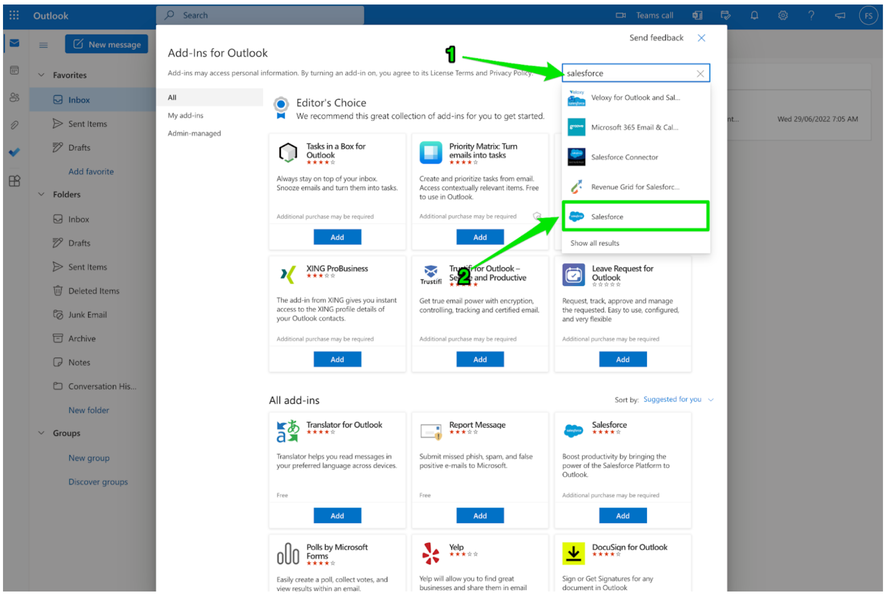
2. Choose **Customize Actions**, scroll to the section named **Message Surface**. Check **Get Add-ins** and press **Save**.



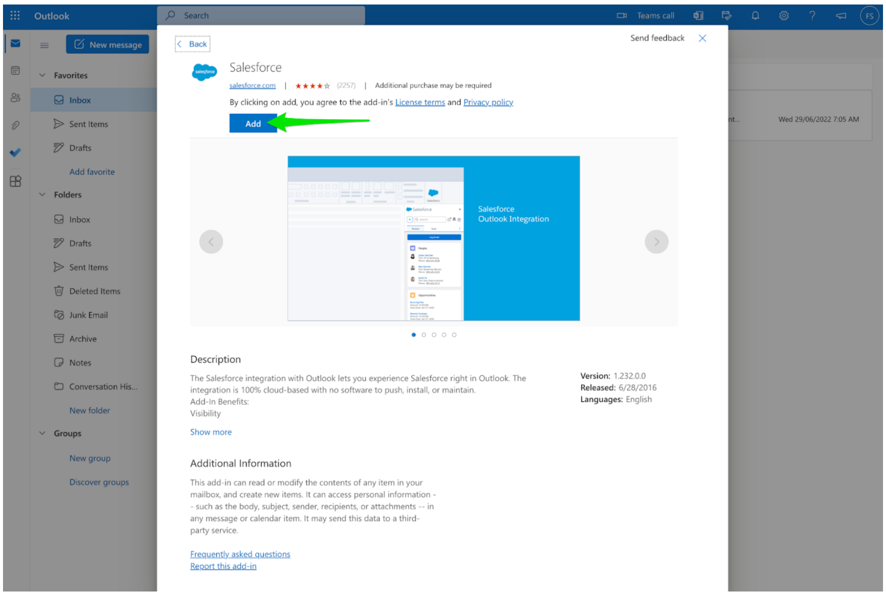
3. Within any message, click the **Get Add-ins** button.



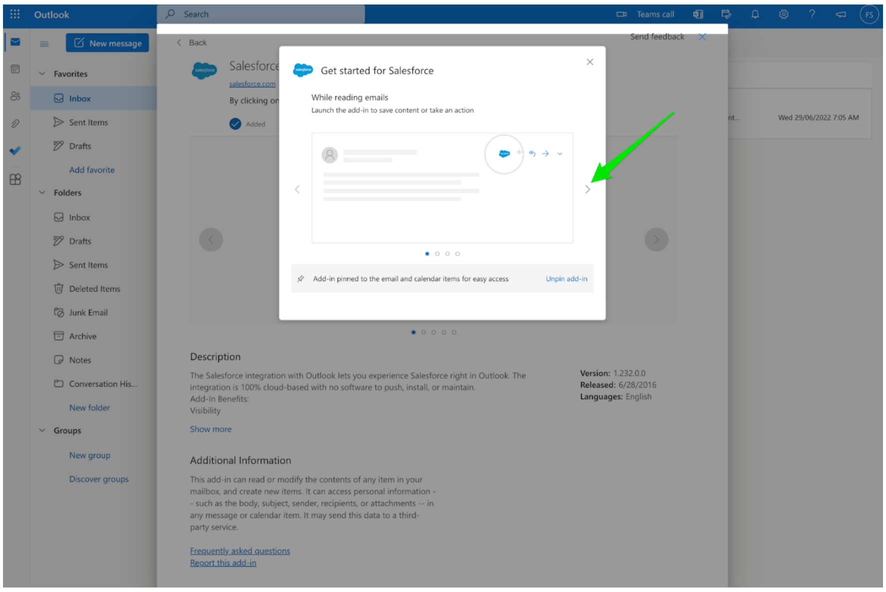
4. Within the Add-ins for Outlook box, search for `Salesforce`. A number of different salesforce add-ins will appear. Select the one shown in the following image or choose **Show all results**.



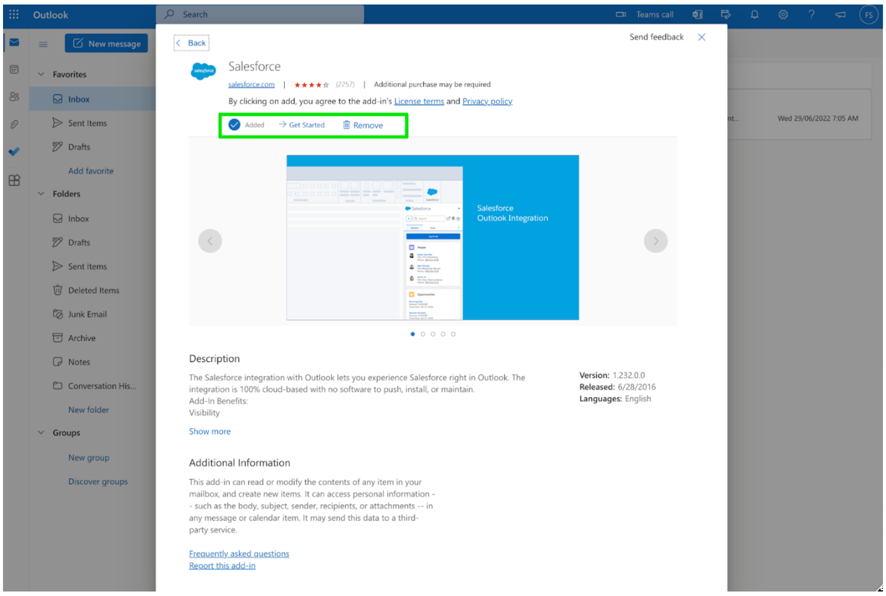
5. From the **Salesforce Connector** page, press the **Add** button.



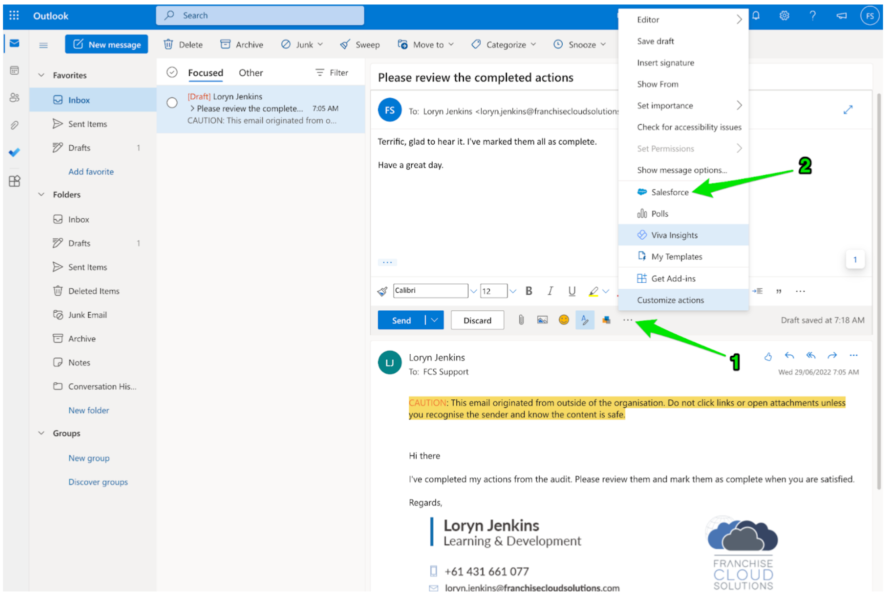
6. We recommend you browse through each of the instructions in the **Get started for Salesforce** box, so you know where to find it and how to use it.



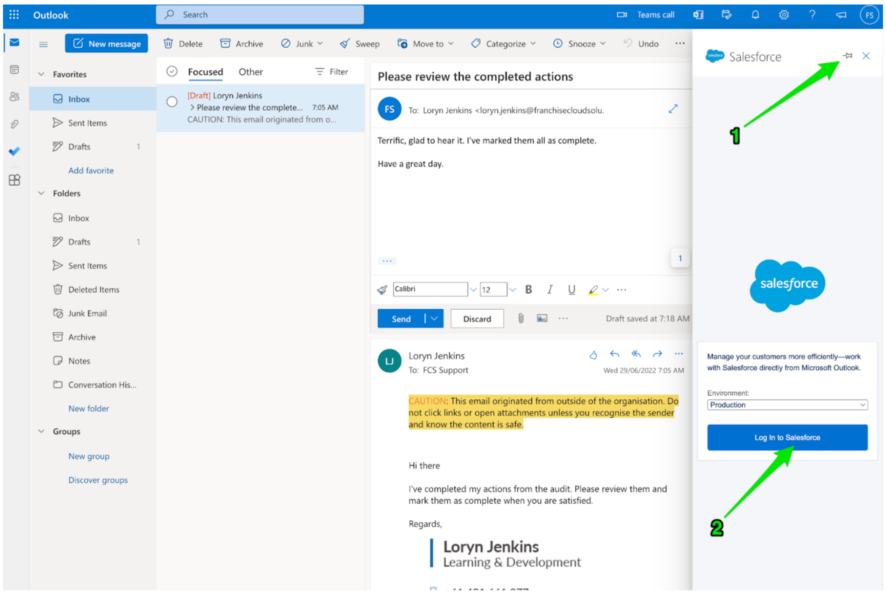
7. Dismiss the **Get started for Salesforce** box and note that the add-in has been added.



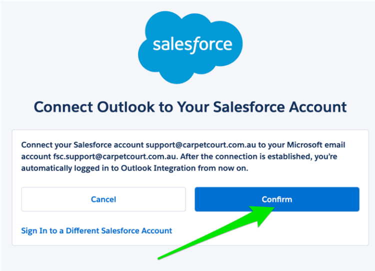
8. Now when you're in any message you're composing, on the **Send** bar, press the **...** button to reveal the menu. Select the **Salesforce** add-in.



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

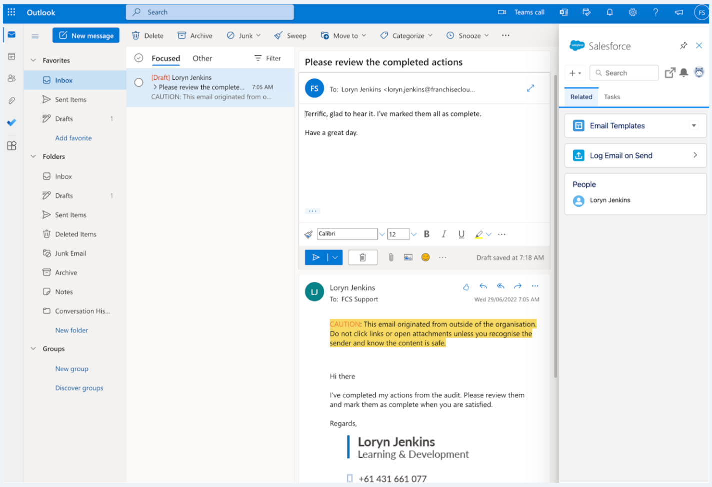


10. At the login prompt, enter your Salesforce **Username** and **Password**. Once logged in, ensure you **Allow** the connection between **Outlook** and your **Salesforce** account.



Congratulations

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



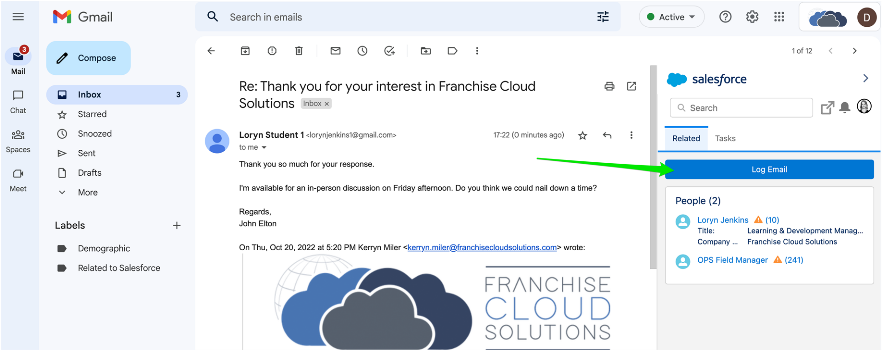
Logging email using Salesforce extensions

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.

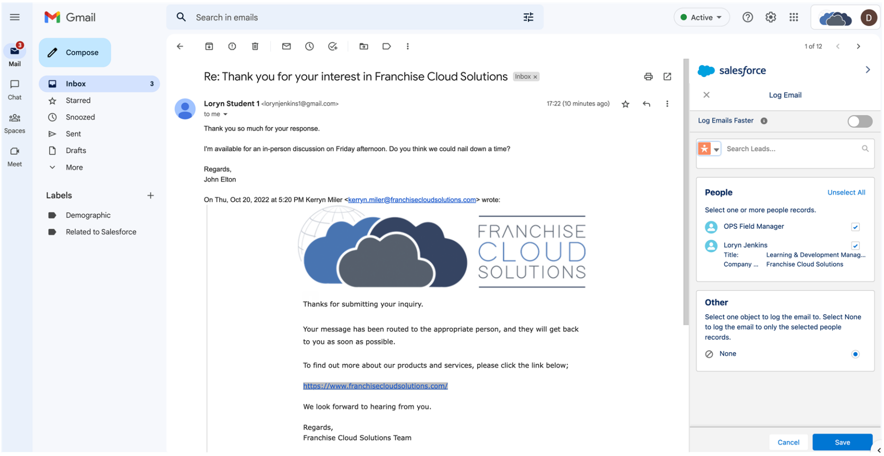
All screen shots below show the Chrome extension. The extension for Office 365 is used similarly.

To log an email against a person

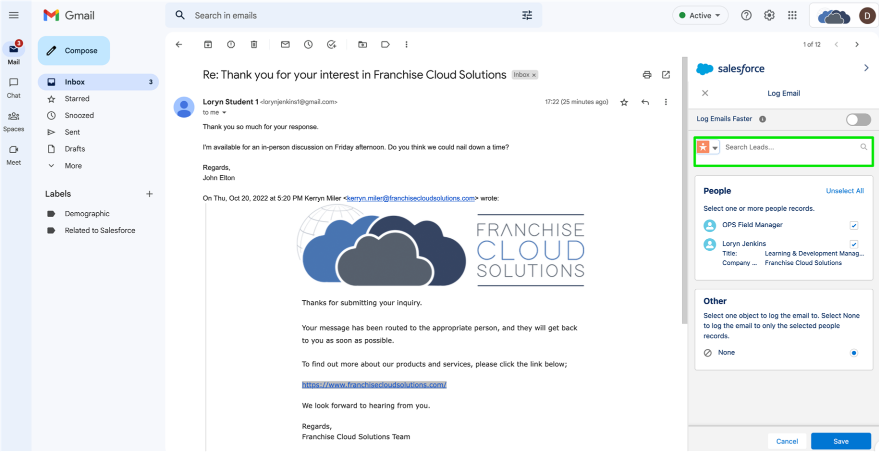
1. With your email open and the Salesforce pane opened, select the **Log Email** button.



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.

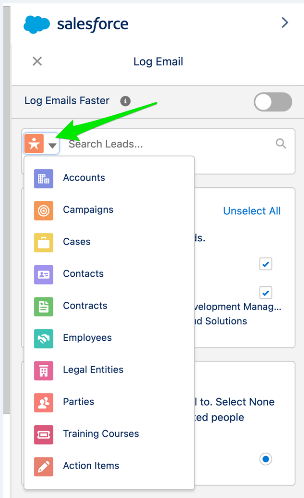


3. If you need to add more people to the list, you can search to find other people or other records. Enter your search term in the search box, and choose from the records appearing in the drop-down list.

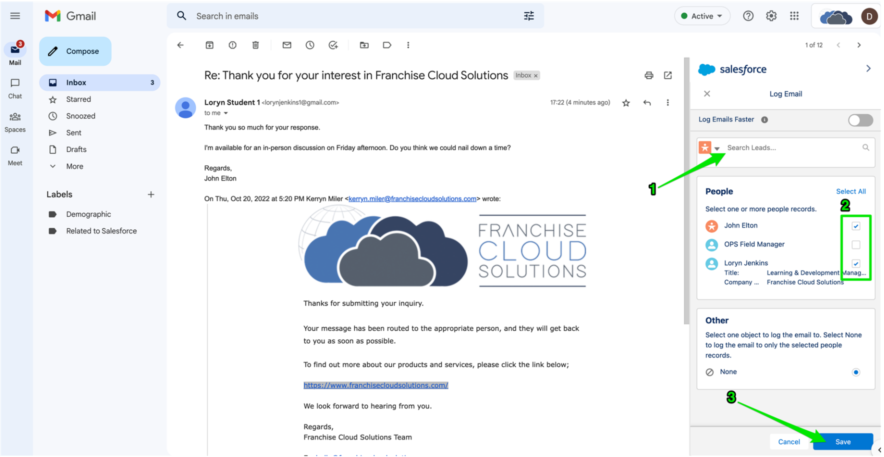


Hint

You can change the record type that you're searching for.



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

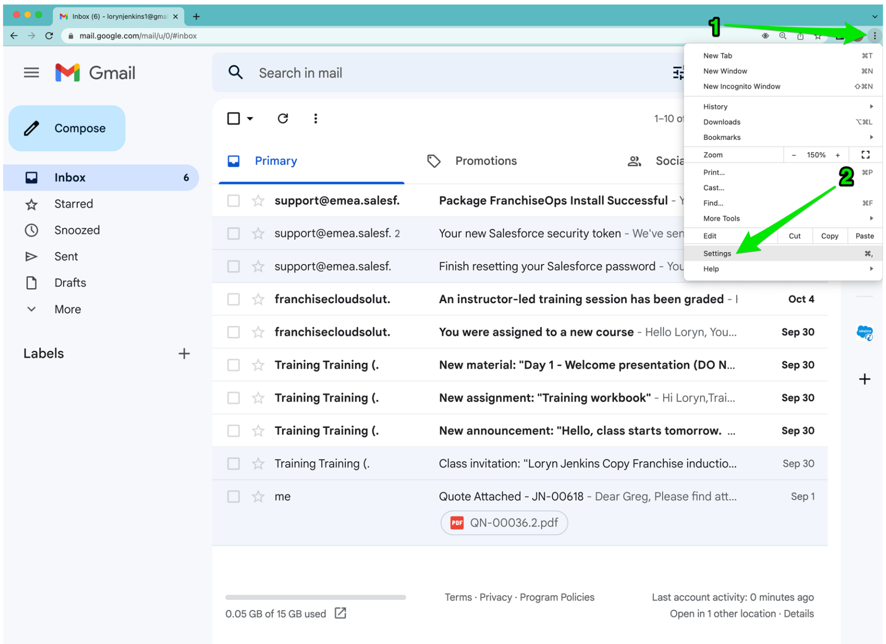
The Salesforce extension for Chrome provides you control as to

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

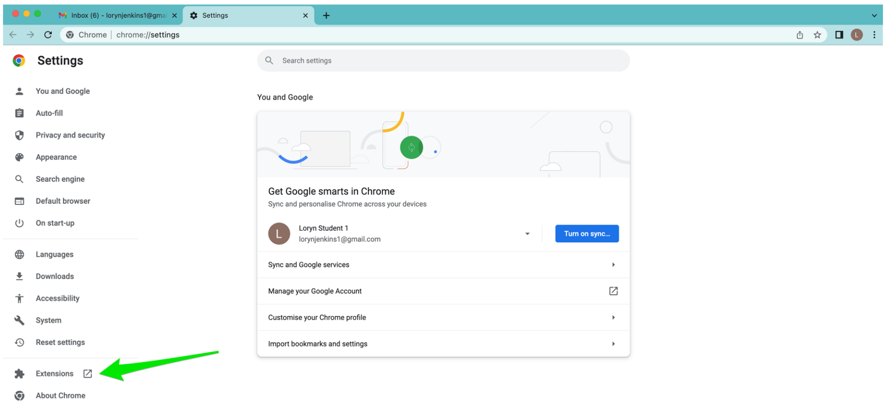
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

To install the Salesforce extension for GSuite

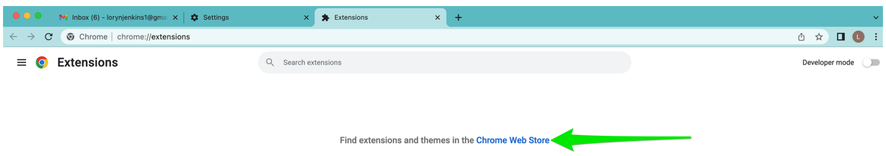
1. Using the **Chrome** browser, open **GMail**. Select the **Customize** ⋮ menu, and choose **Settings**.



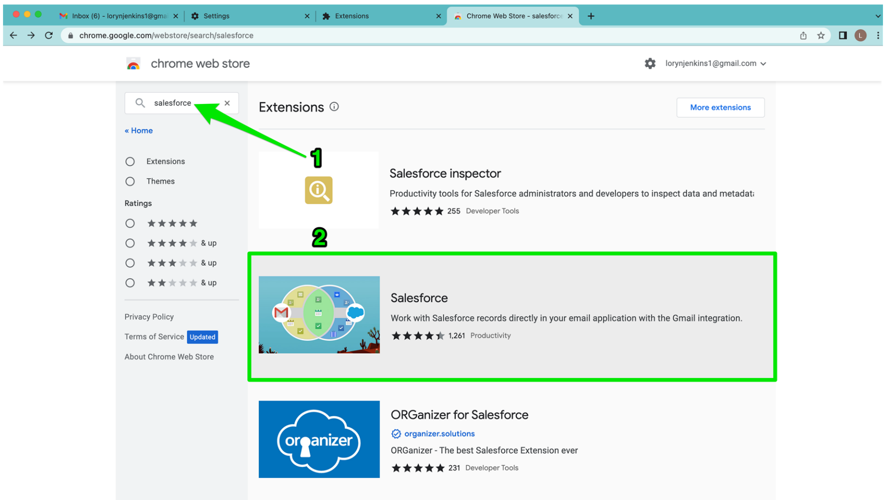
2. Chrome opens a tab in which it displays the **Settings** menu. Select the **Extensions** link.



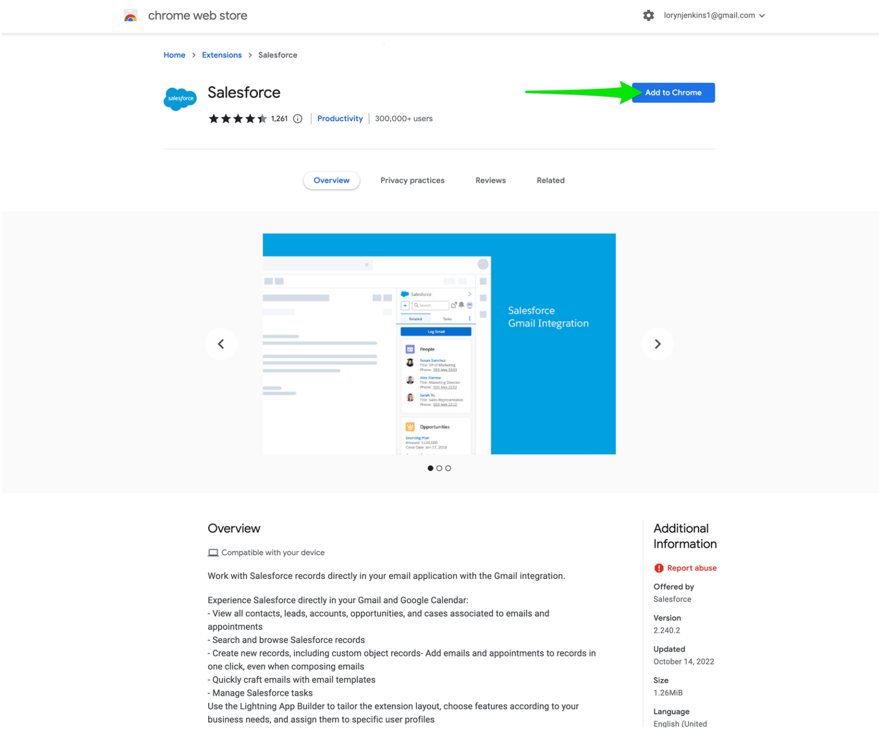
3. **Extensions** opens in yet another tab. Select the link to the **Chrome Web Store**.



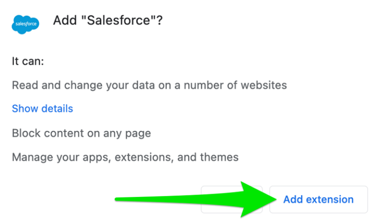
4. A fourth tab opens and displays the **Chrome Web Store**. In the search box, search for `Salesforce`. Select the **Salesforce** extension.



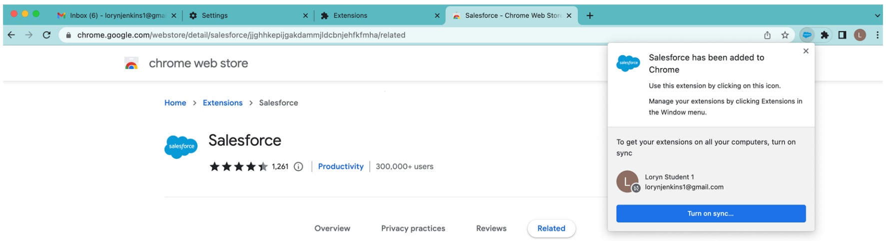
5. From the **Salesforce** entry, select the **Add to Chrome** button.



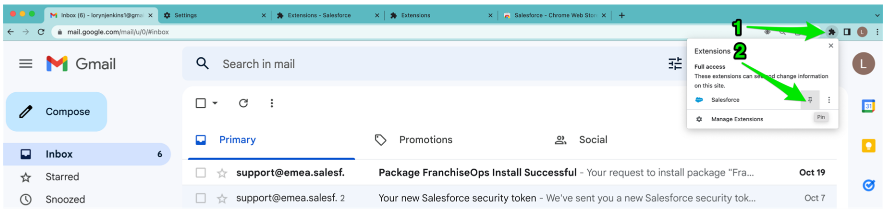
6. From the **Add "Salesforce"** box, select **Add Extension**.



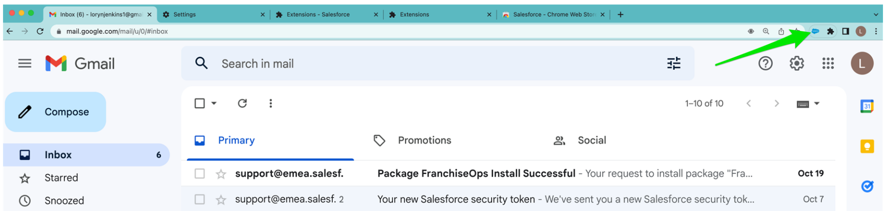
7. Salesforce adds the extension to Chrome then provides a popup to confirm that the extension has been added.



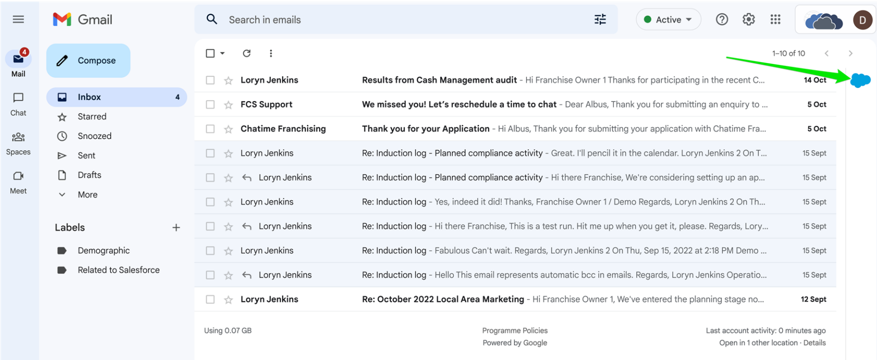
8. Now go back to the tab containing **GMail** and click on the Extensions button, then click the **Pin** button beside the Salesforce label.



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

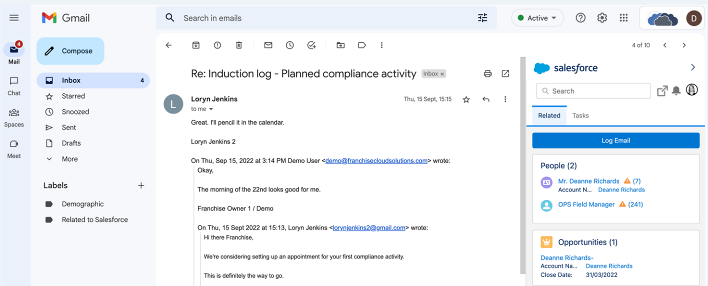


10. The Salesforce extension for Chrome now appears in the sidebar of your web browser. Click on the Salesforce cloud icon to expand the sidebar.



Congratulations

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

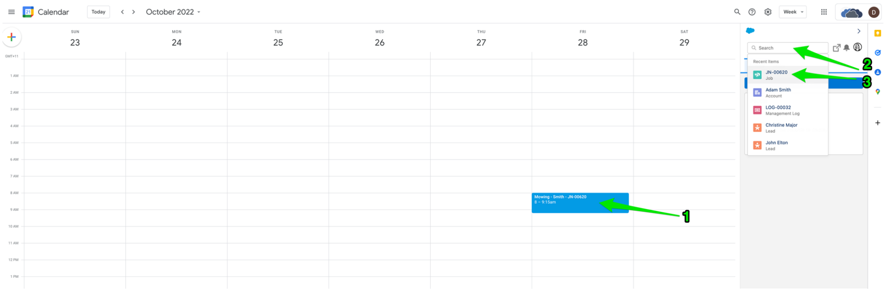


Logging events using Salesforce extensions

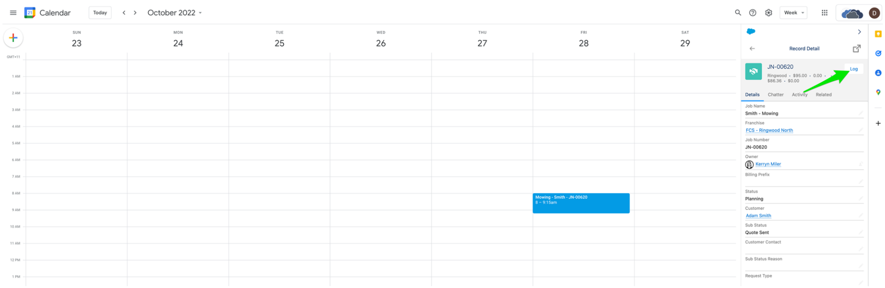
If automatic event syncing is not configured from your personal calendar back to the Salesforce calendar (check with your system administrator) you may still be able to manually log events using the Salesforce extension.

To log an event to a Salesforce record

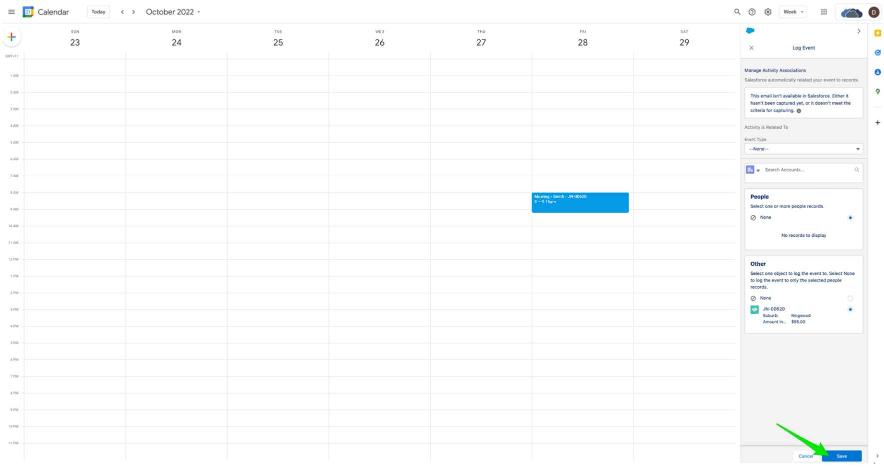
1. In your personal calendar select the event, then search for the appropriate record within the Salesforce search pane.



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

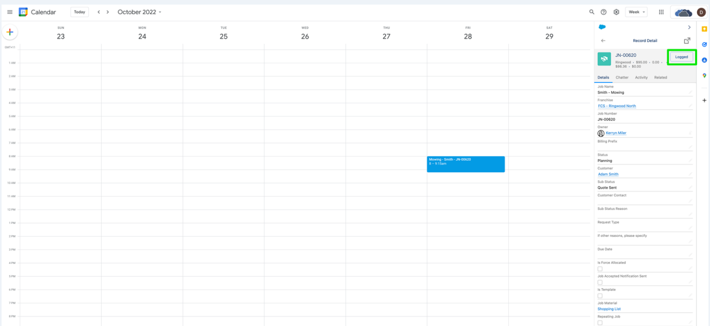


3. Now press **Save**.



Congratulations

The event is logged to Salesforce.

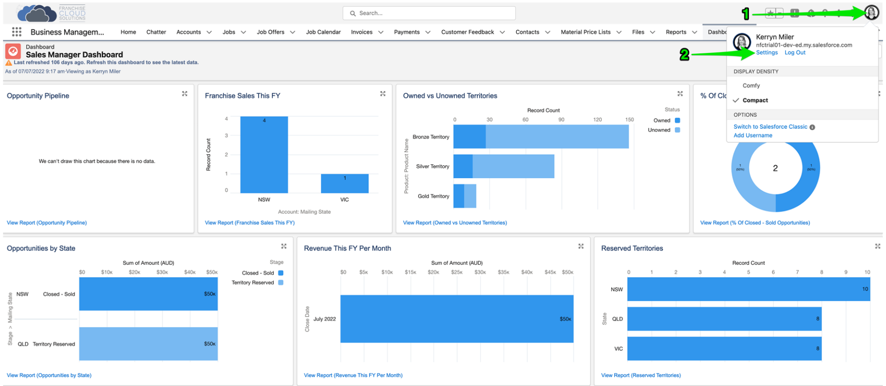


Configure My Email to Salesforce

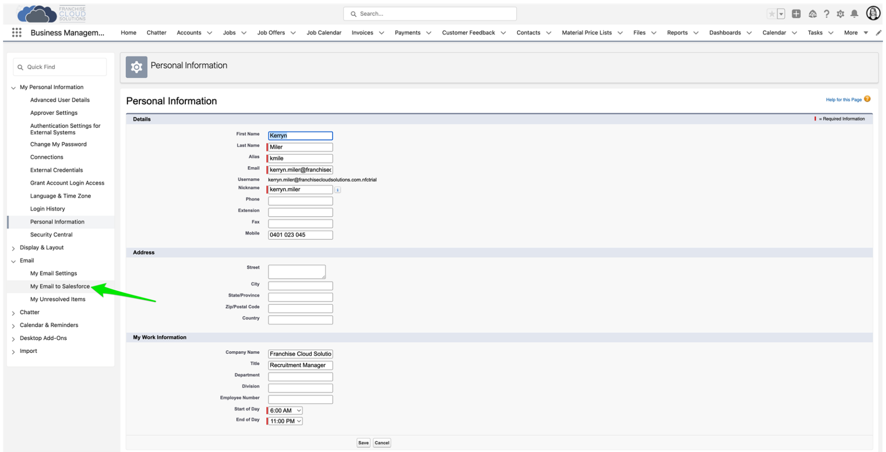
You can configure email to Salesforce to allow you to conveniently forward emails from your mobile to Salesforce for messages relating to a Lead, Contact or Opportunity. This is most useful for recruitment.

To configure My Email to Salesforce

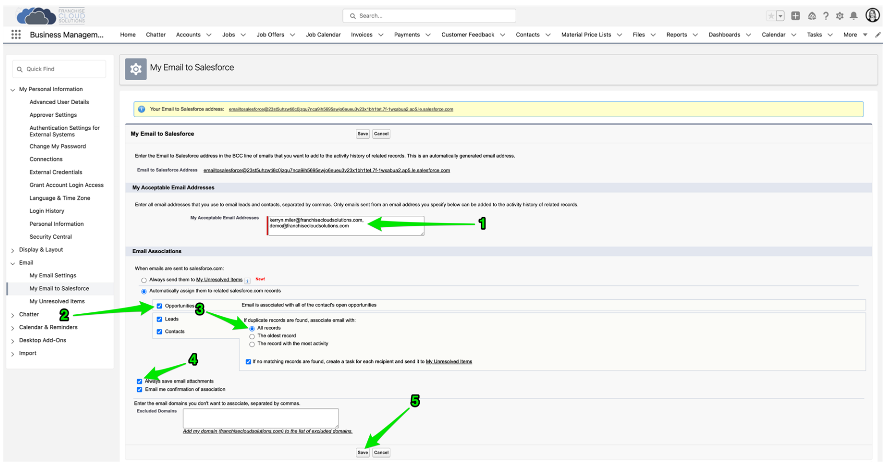
1. In Salesforce, open **View Profile** and then select **Settings**.



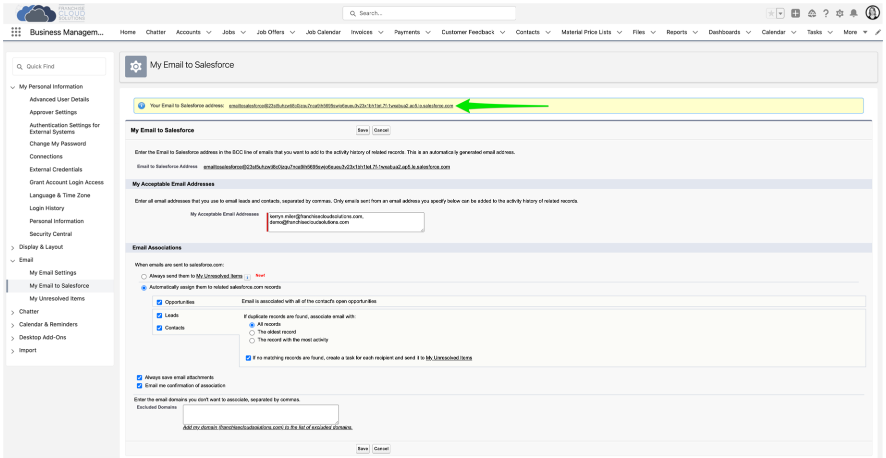
2. From the menu, select **My Email to Salesforce**.



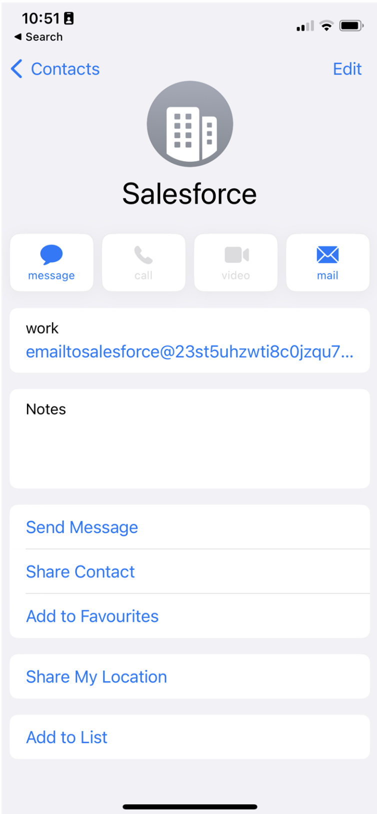
3. In the My Email to Salesforce page configure it according to your needs. Add your email address (or email addresses, if you have more than one). Check **Opportunities**. Add email to **All records** when there is a duplicate. Check **Always save mail attachments**. When you're done, press **Save**.



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



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”.



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

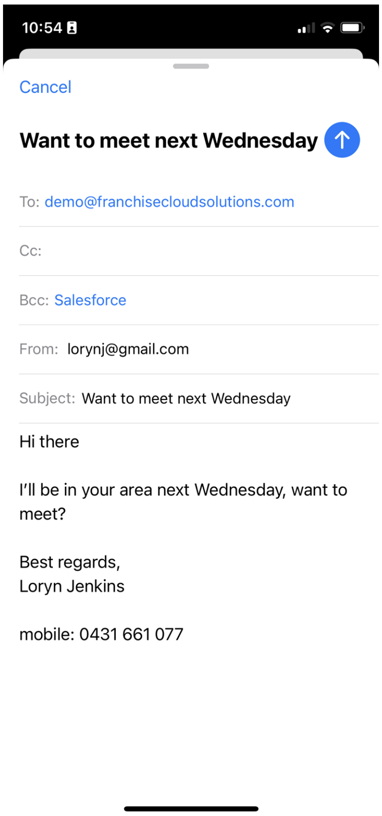
If you’re a franchise recruitment specialist working with leads, contacts and opportunities, and primarily use your mobile for email communications, you may find the **My**

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.



4. When you're ready, press **Send**.

Congratulations

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

CHAPTER 9

Working with Campaigns

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.

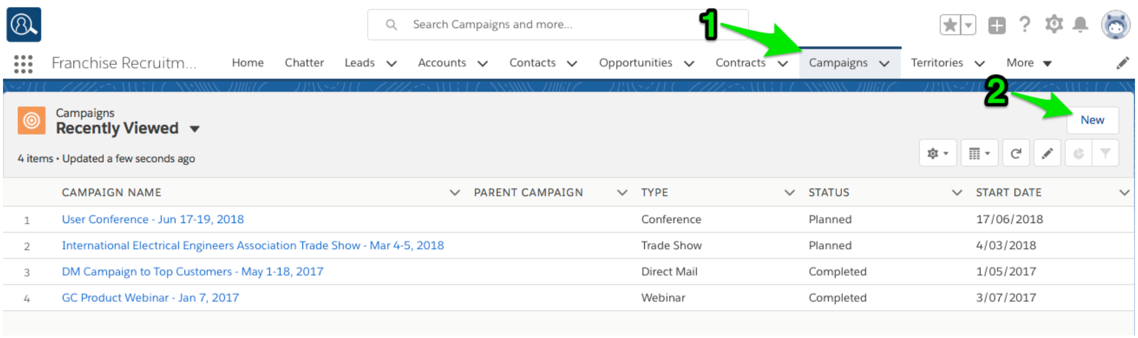
Within Franchise Recruitment, the names of campaigns appear within a web form on your website. The web form allows prospects to register their interest in purchasing a franchise or registering for potential employment. These entries are automatically populated into Salesforce.

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.

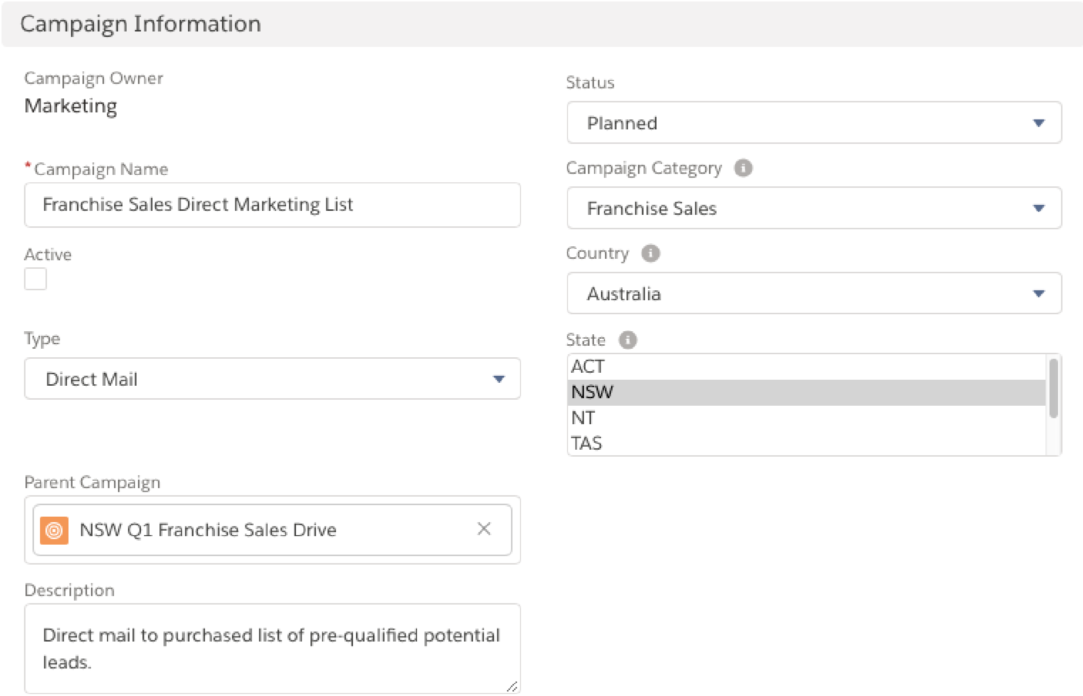
To set up a new Campaign

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



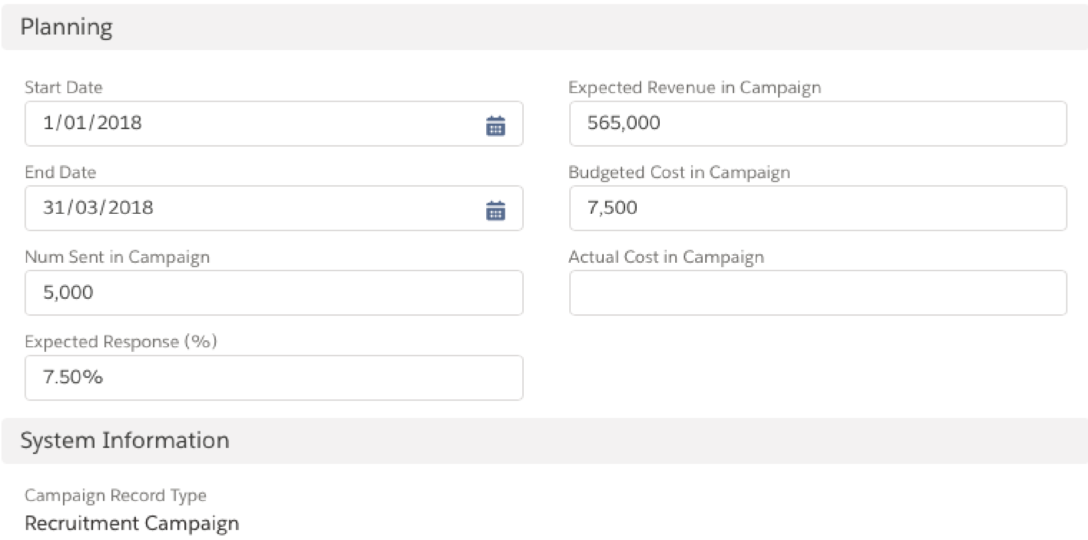
2. Complete the **New Campaign** dialog box.

» Enter **Campaign Information** details.



> 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`.



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`	Excluding campaigns set to states other than the `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

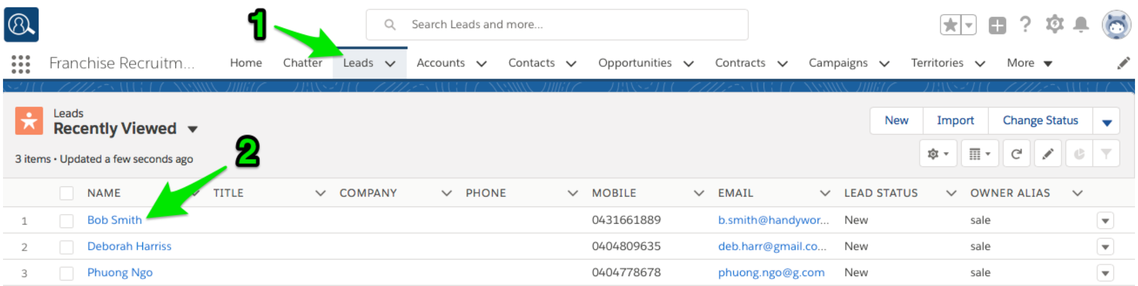
In the **Campaign Detail** page, `Hierarchy ROI` gives you a summary of the return on investment of the current Campaign summed with the ROI of all its child campaigns. To see a more detailed report, look up the standard Salesforce report "Campaign ROI Analysis Report" (found in the Salesforce Marketing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

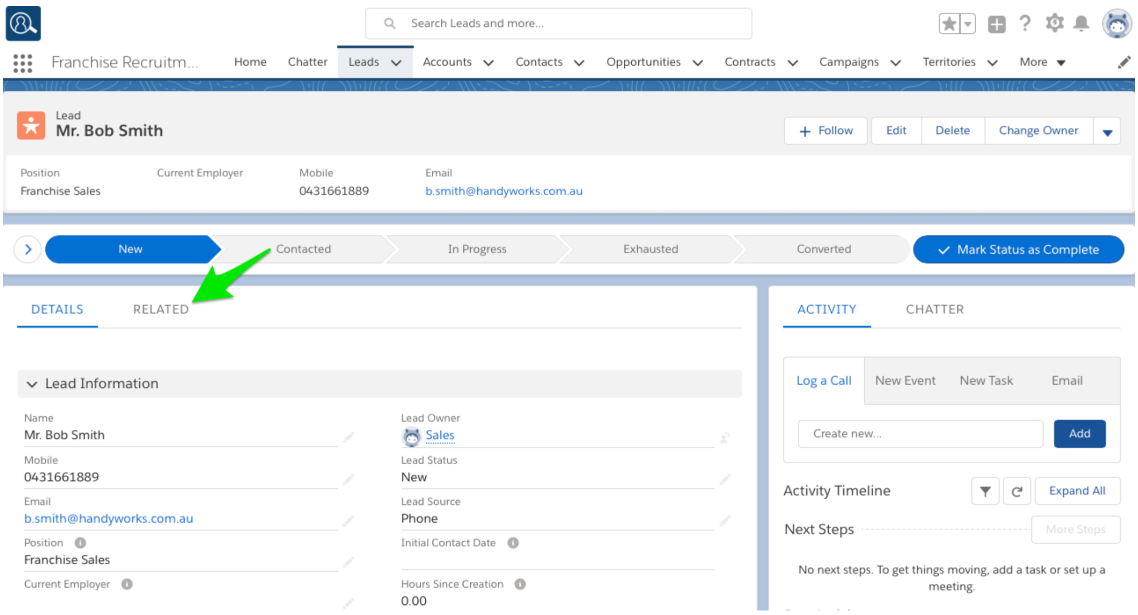
How to add a Lead as a Campaign Member

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

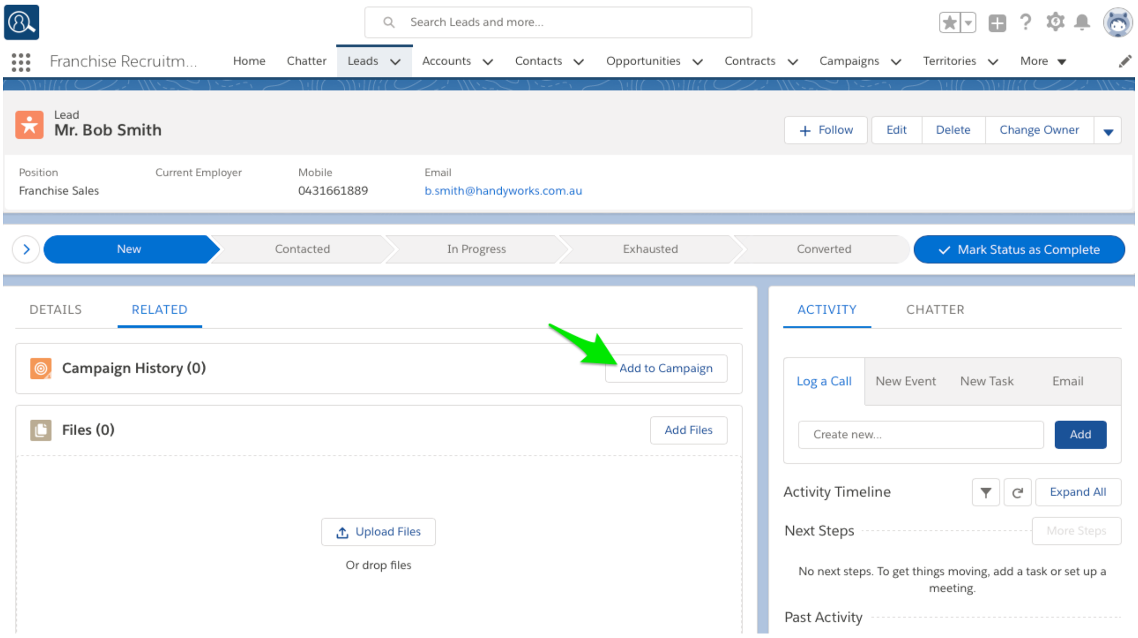


The **Lead** page appears.

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



3. Press **Add to Campaign**.



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.

CHAPTER 10

Working with Activity Lists

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.

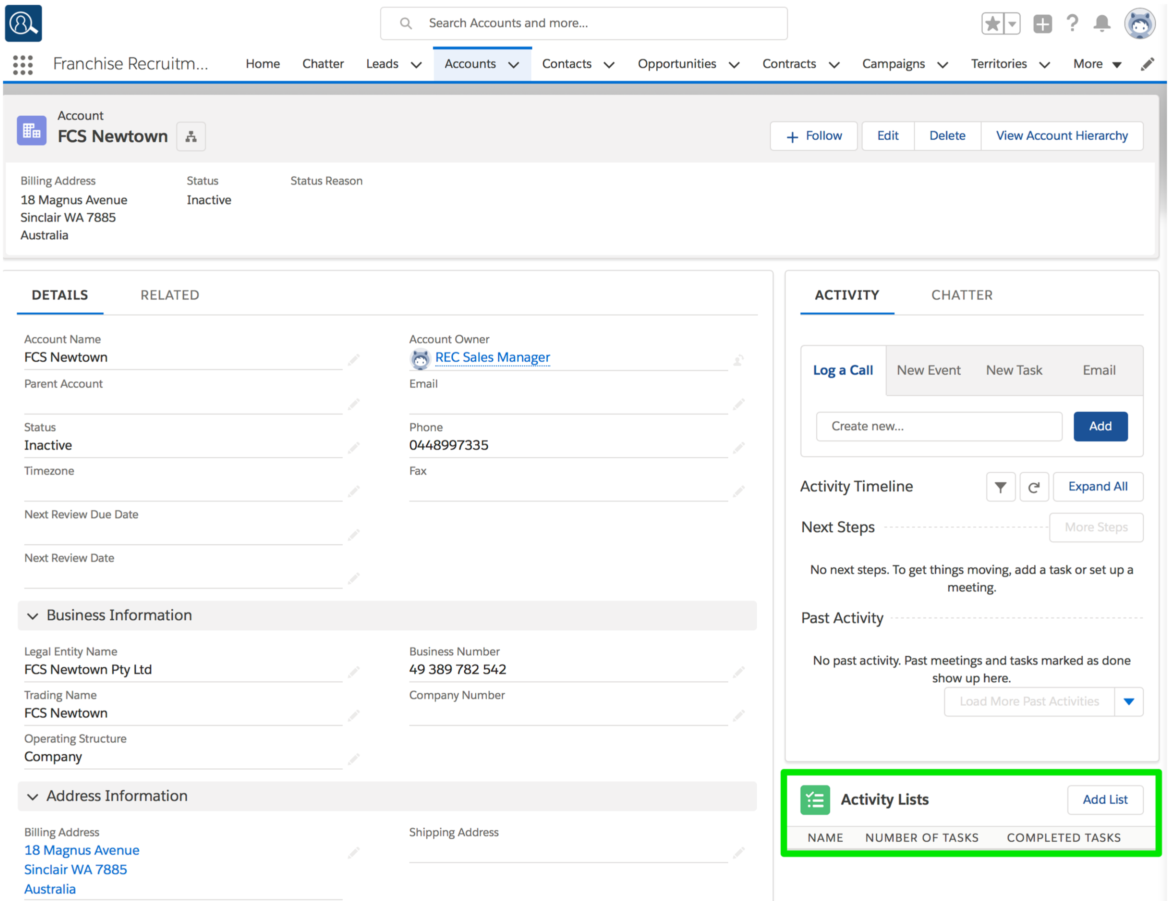
At its heart, an activity list contains a list of tasks. The tasks can be automatically assigned to individuals to be completed within a certain time-frame.

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.

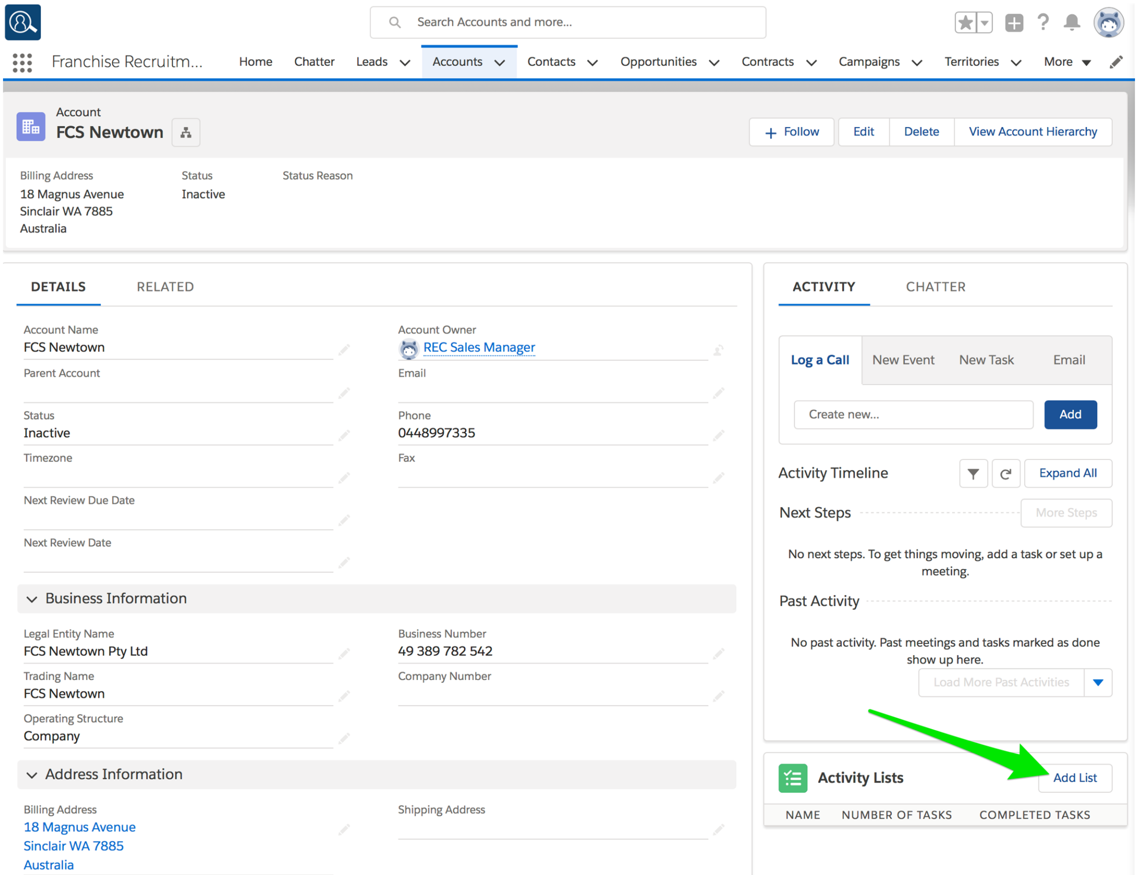
Applying an activity list

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



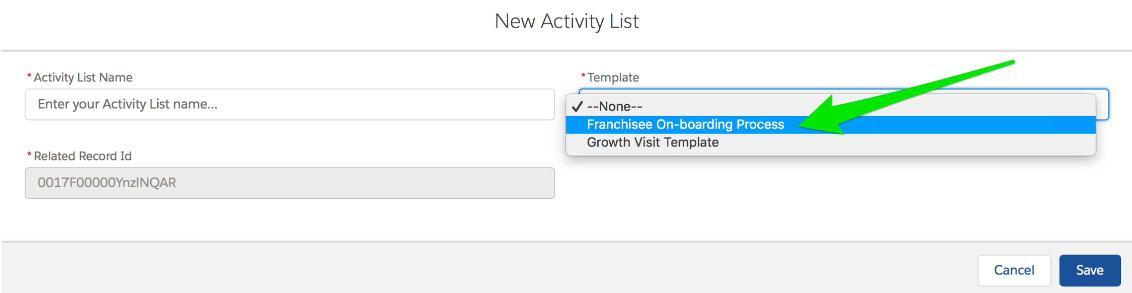
To apply an activity list:

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

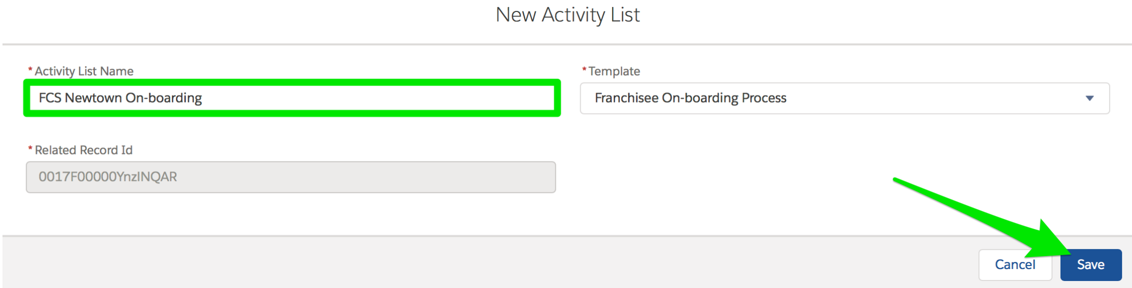


The **New Activity List** dialog box appears.

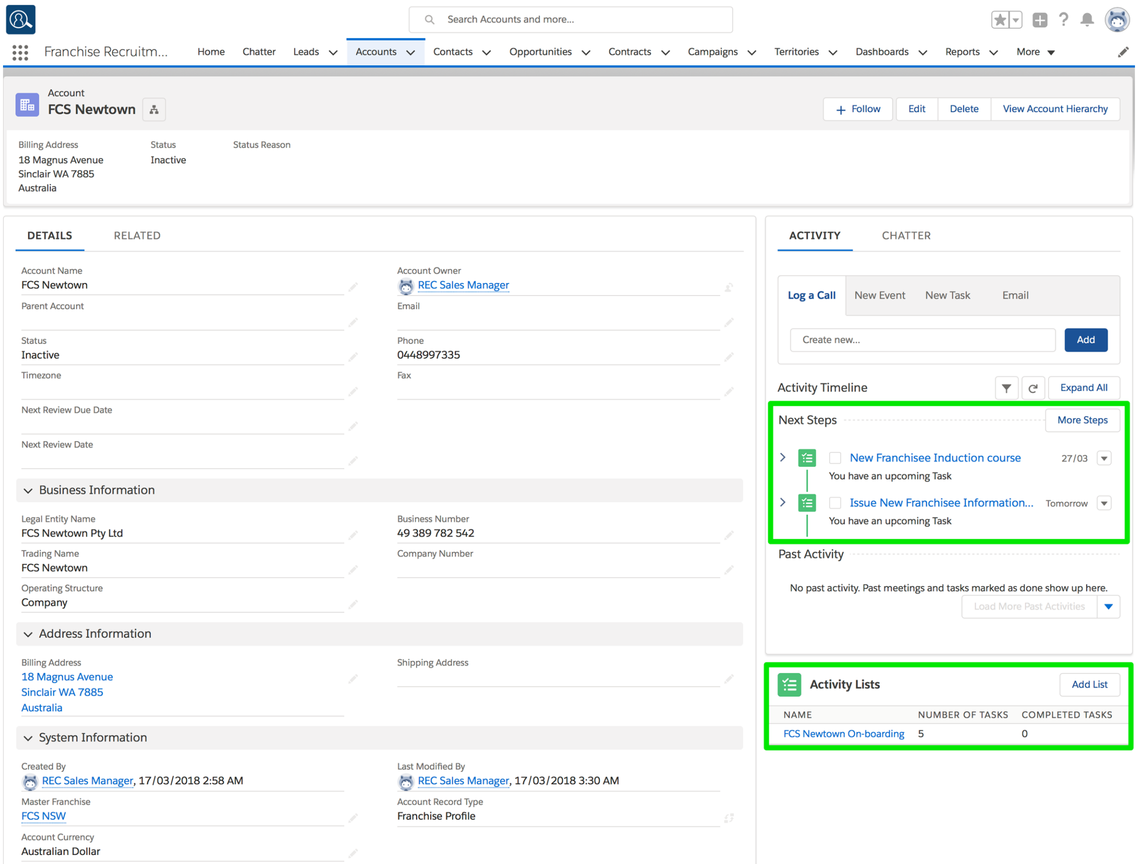
2. Select an available `Template`.



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



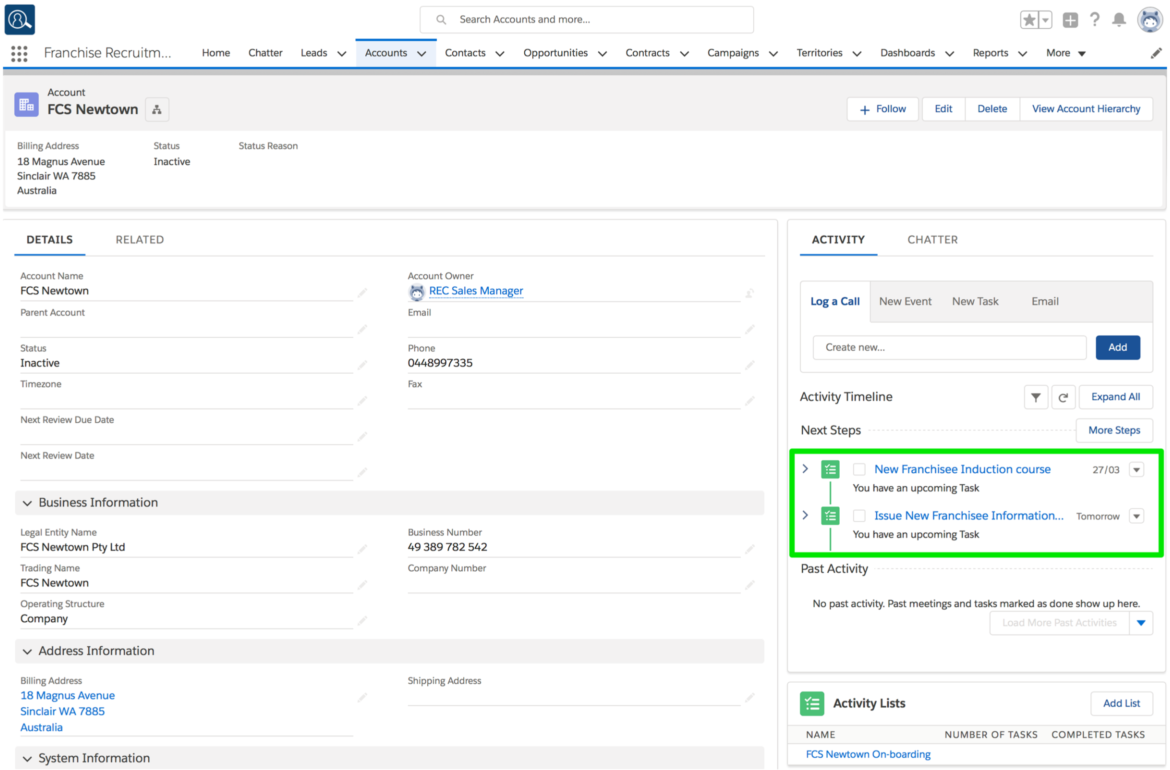
The **Activity List** is attached to the record and at least some of the tasks from the list appear within **Next Steps**.



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

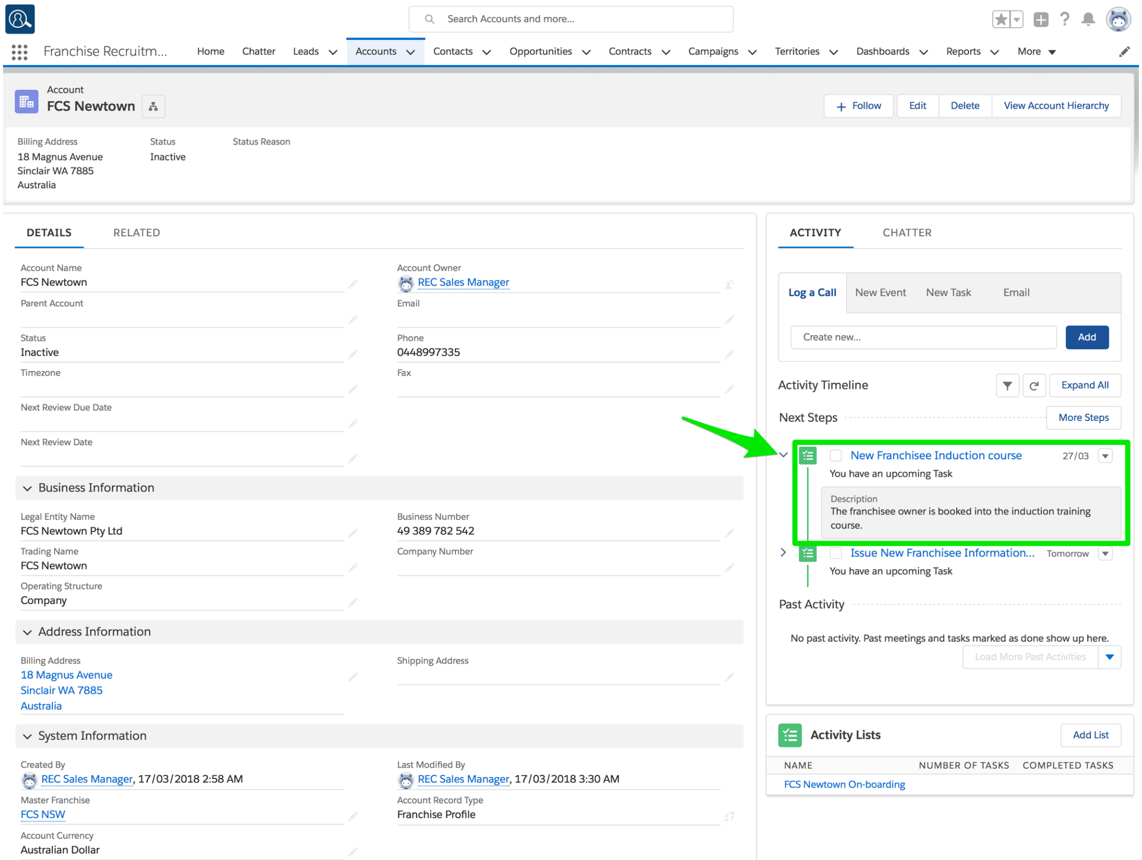
Working with activity list tasks

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**.



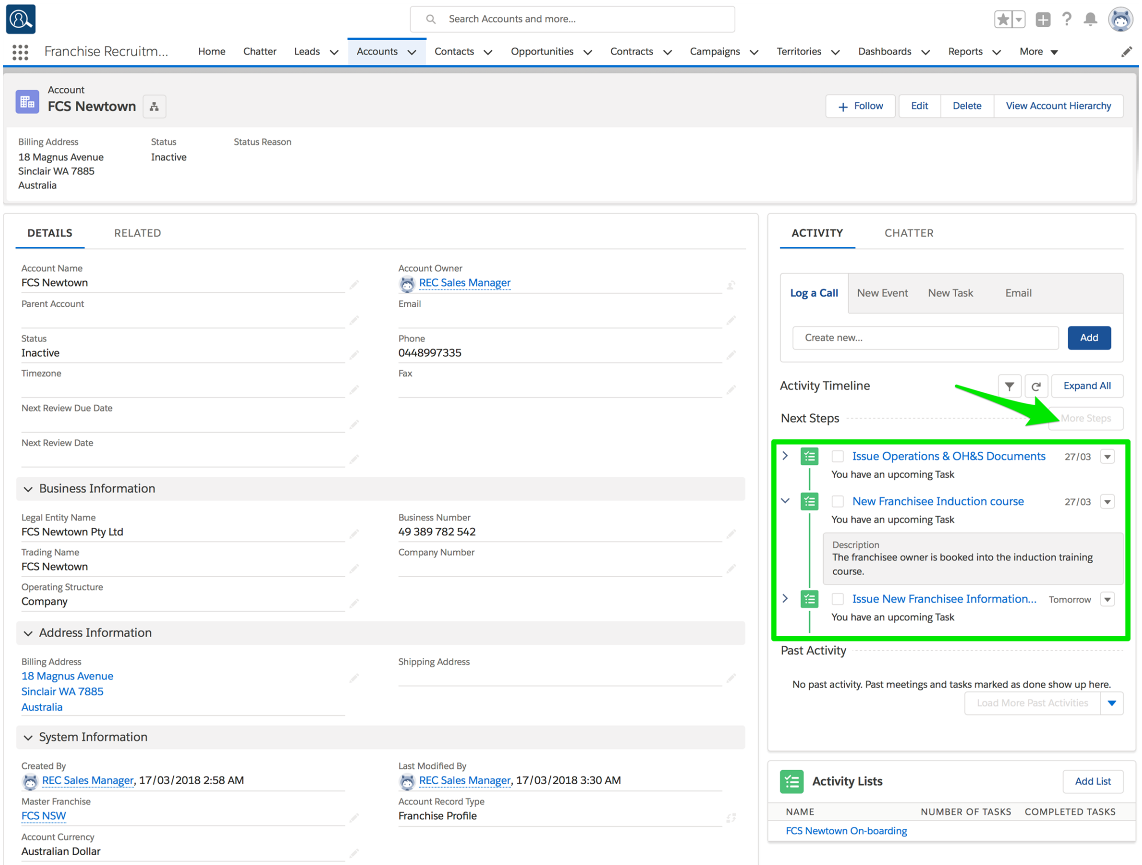
To view more details about an individual task:

» Click the task arrow to reveal more information.



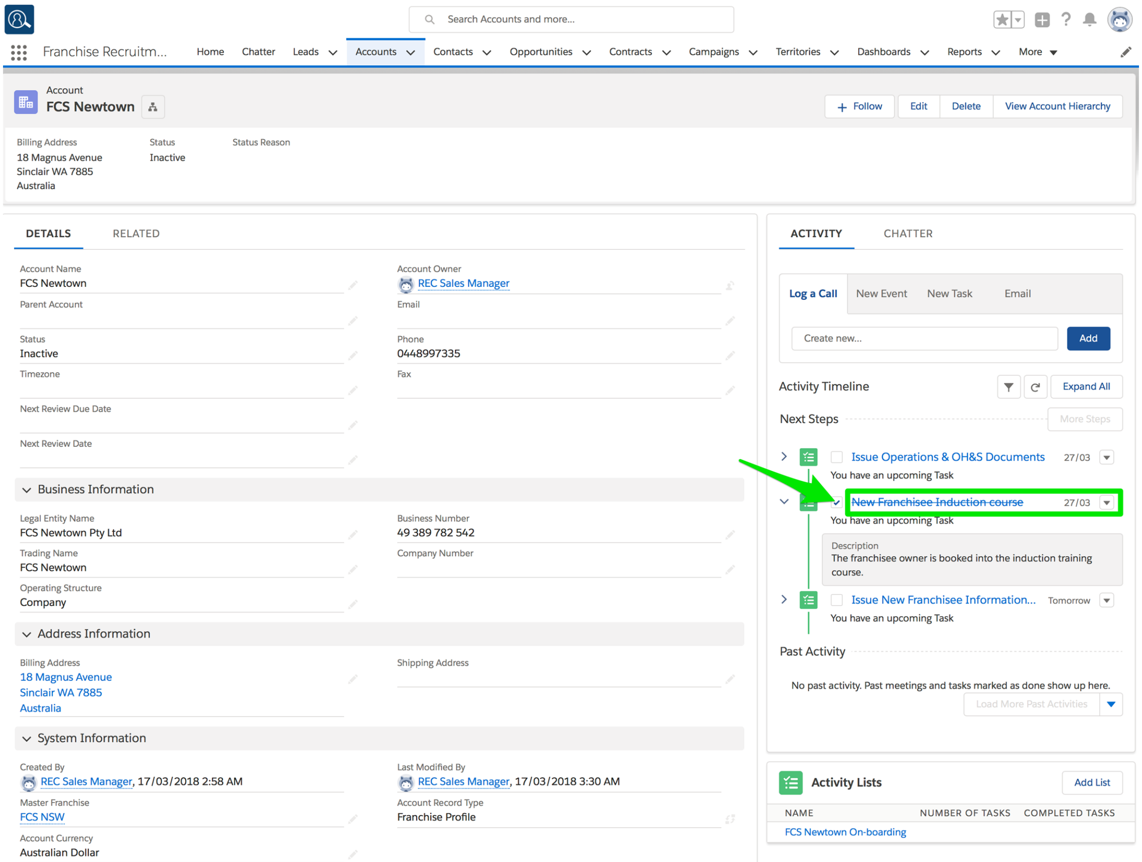
To reveal more tasks:

» Press **More Steps**.



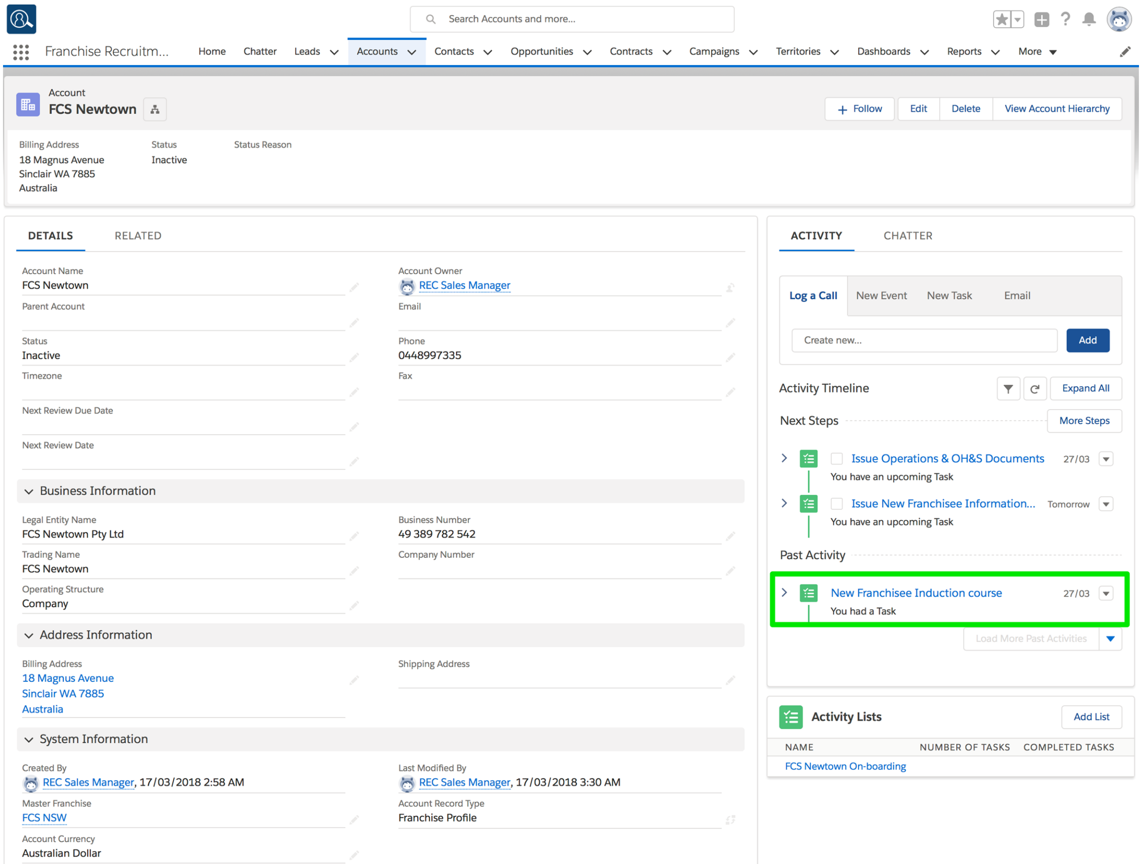
To mark a task as complete:

» Check the task check box.



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**.



CHAPTER 11

Working with Reports

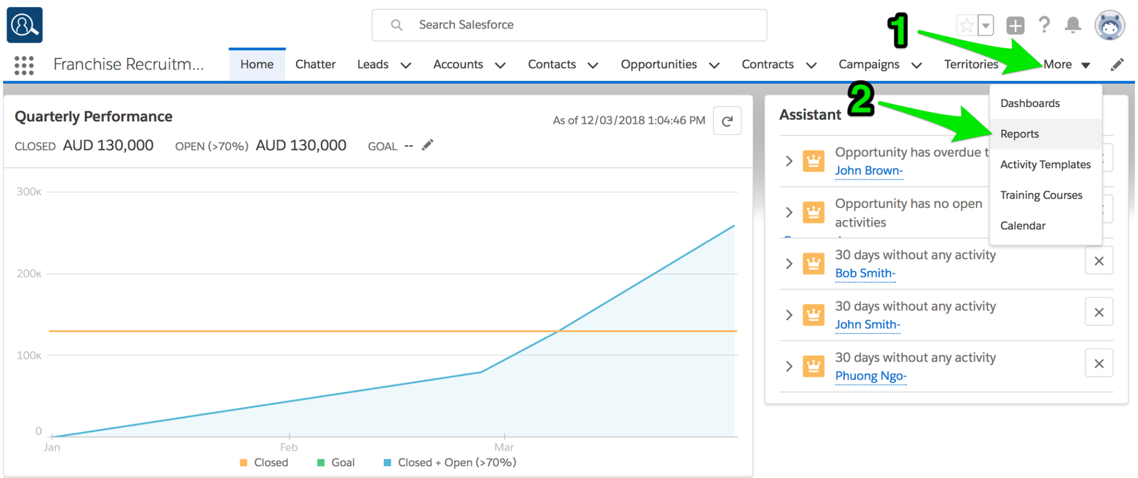
Understanding reports

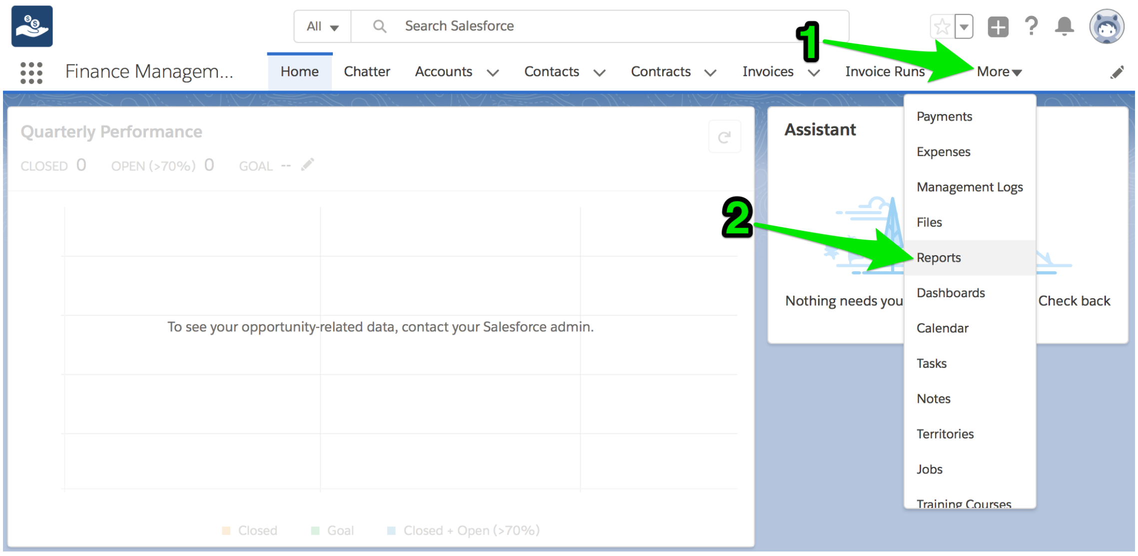
A report provides a summary of your records filtered by specific criteria at a point in time. Reports provide a great way to remain aware of the overall performance of your business.

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

To discover available reports

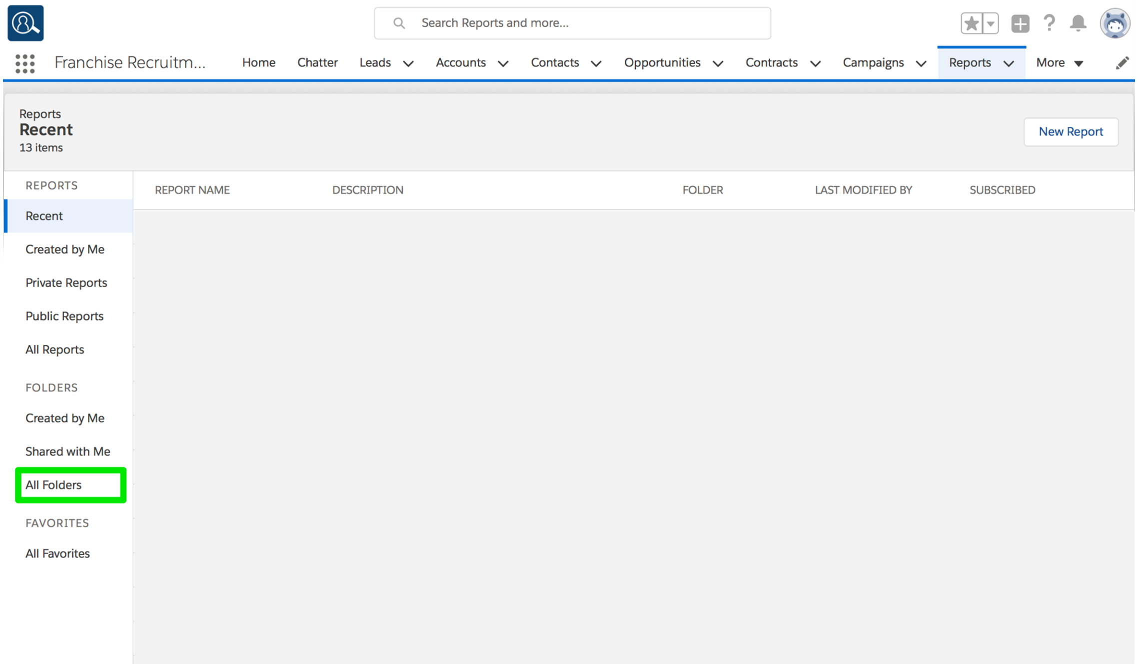
1. From the Salesforce menu, choose **More**, then choose **Reports**.

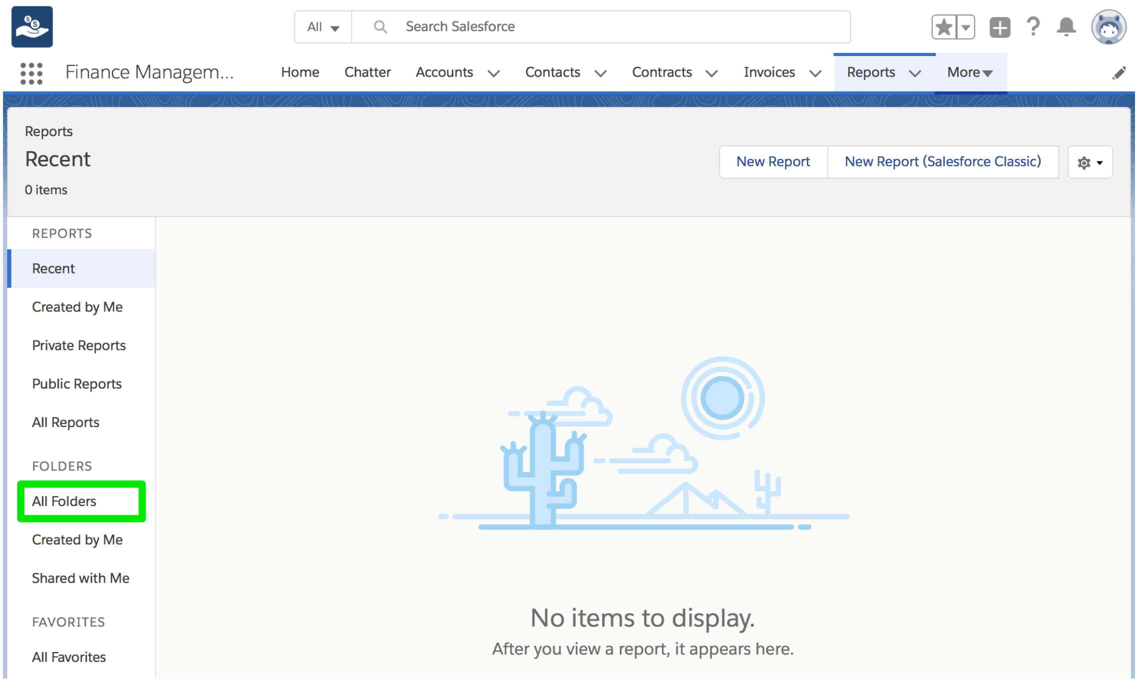




The recent reports folder appears. If you have yet to use a report, this will be blank.

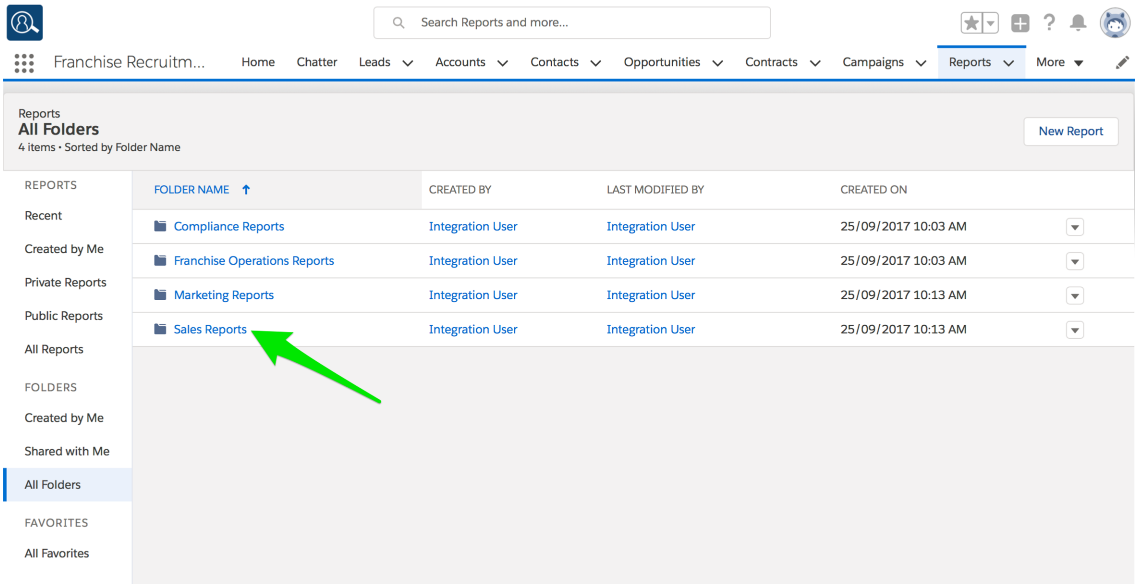
2. To see the different types of reports, go to the **All Folders** folder.

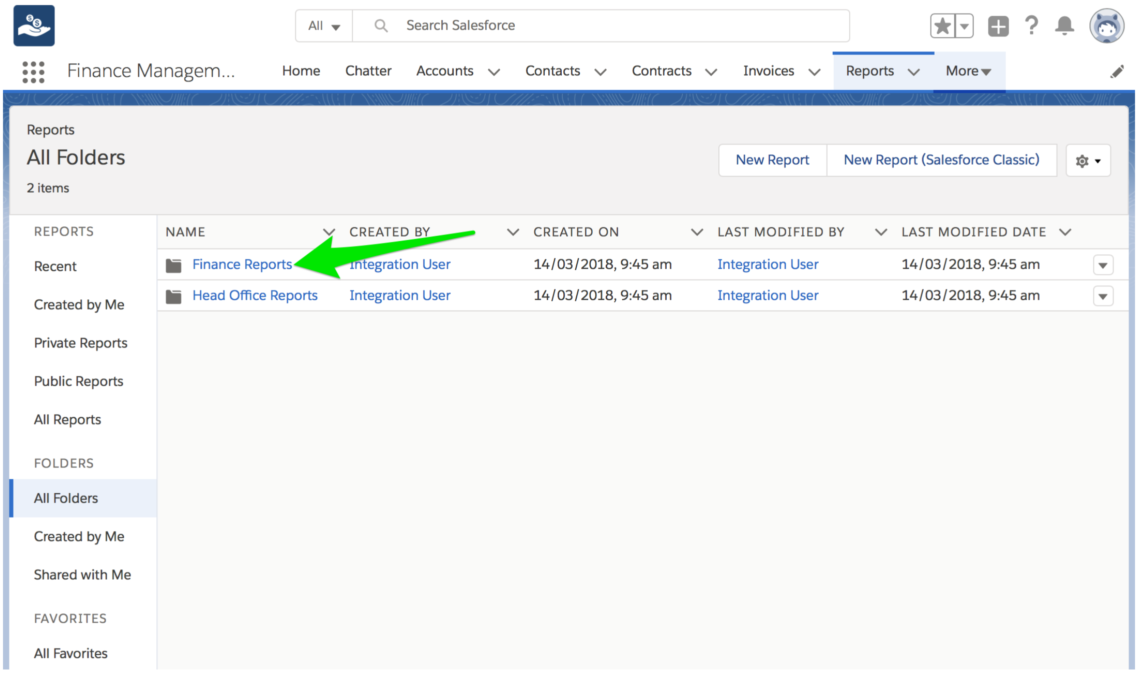




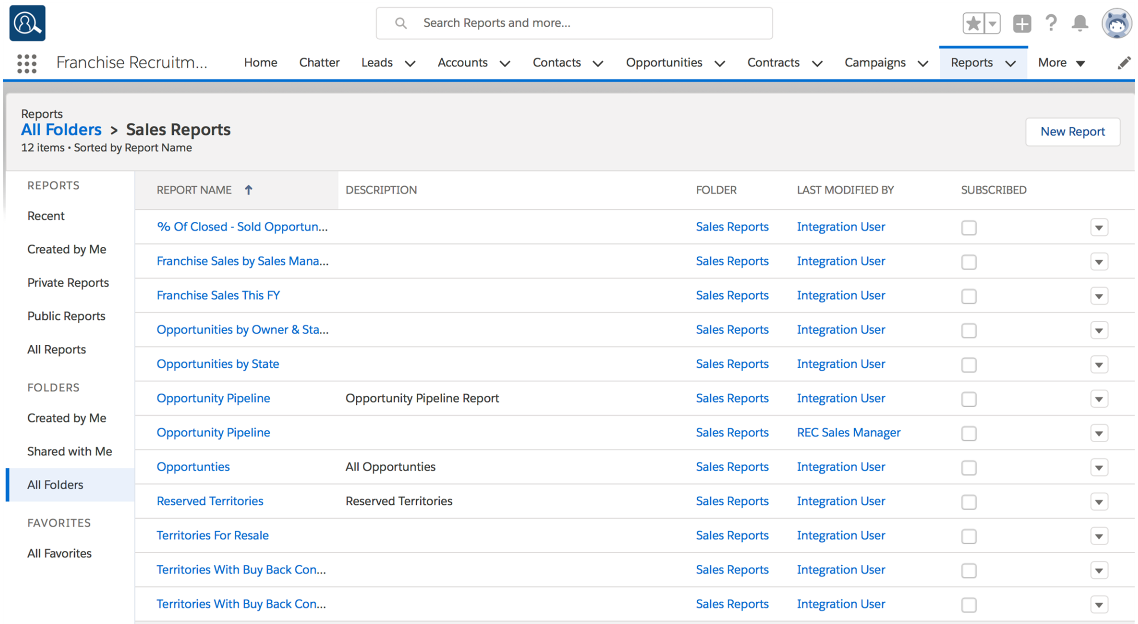
There you will see each of the different categories of report that come with Franchise Recruitment.

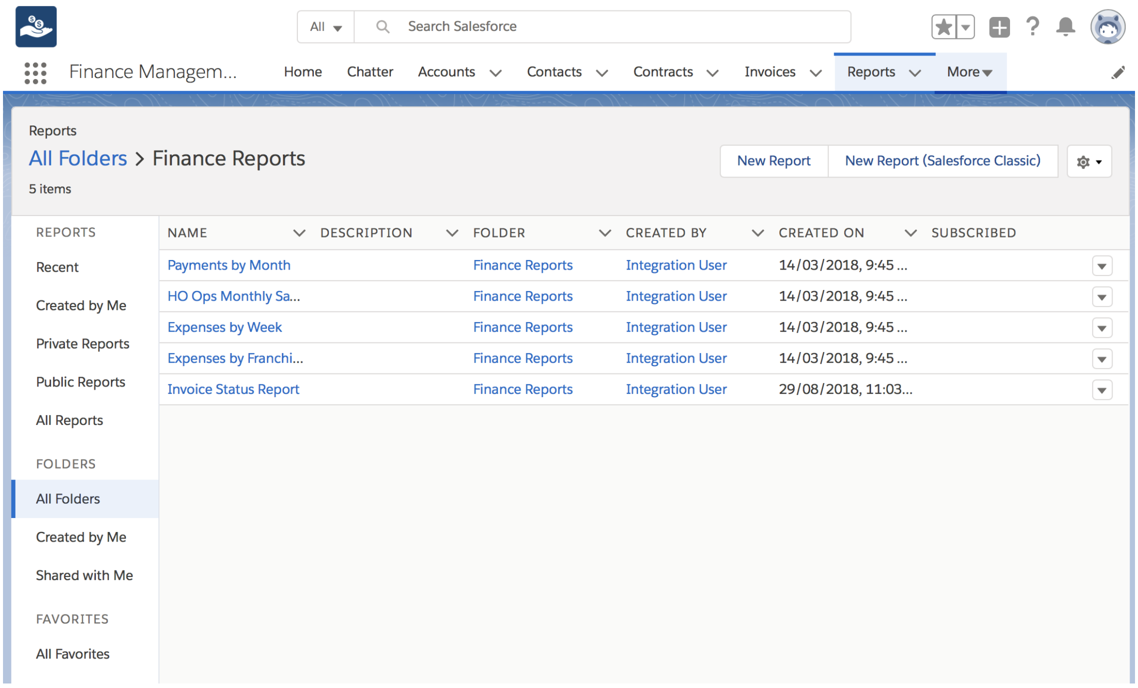
3. Select any one of the report folders.



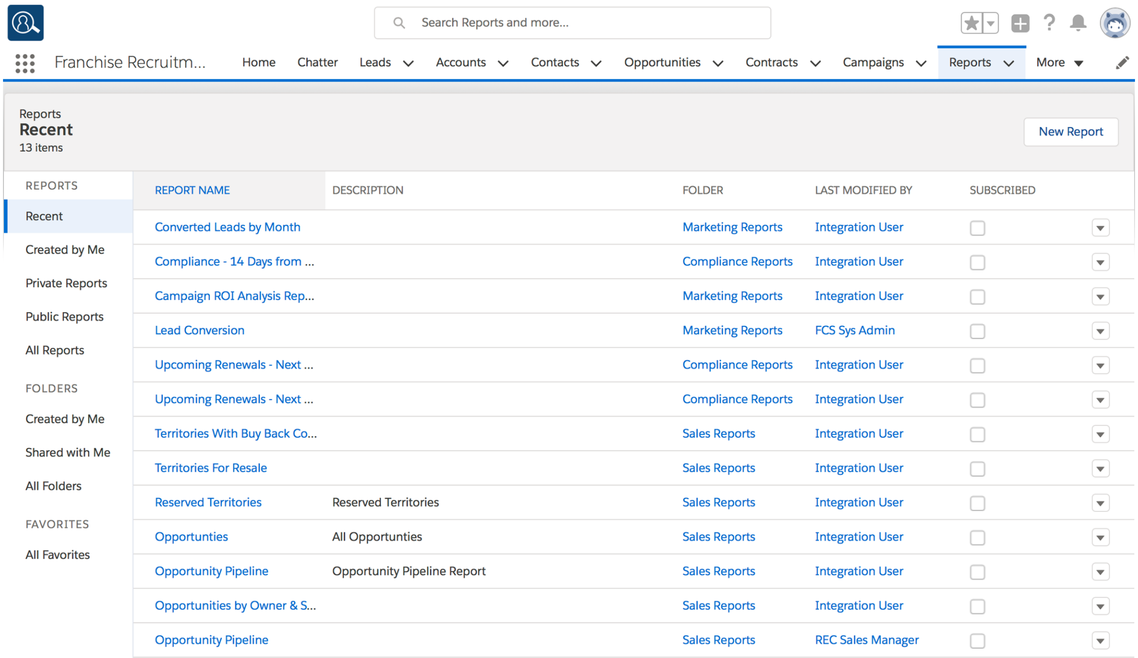


Now you can see the reports within that folder.



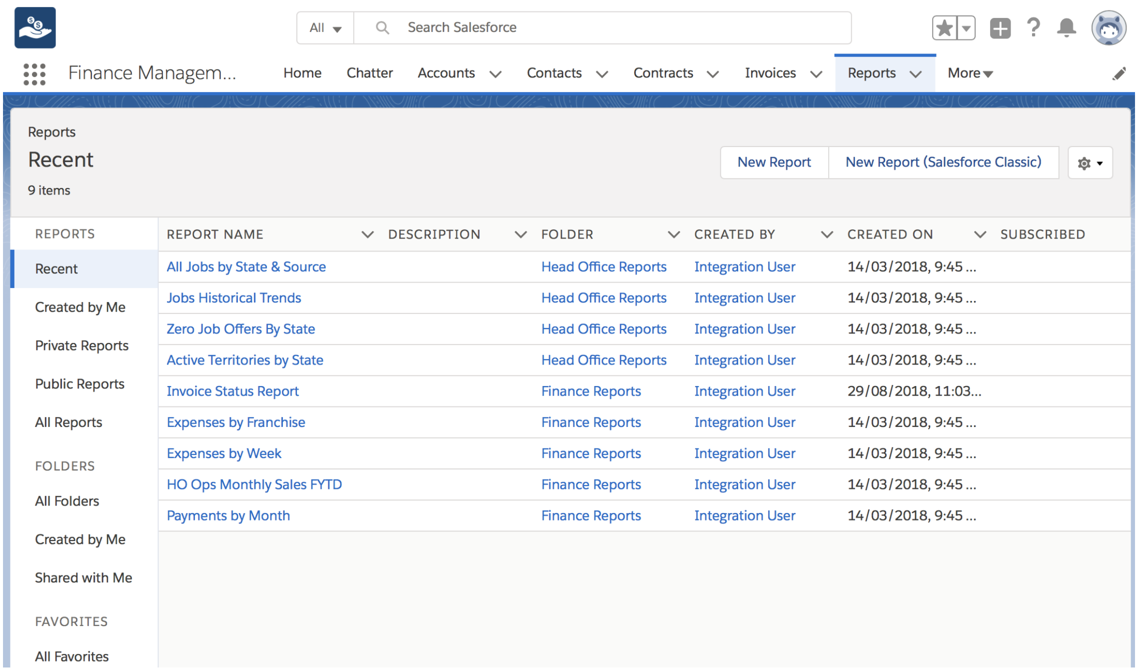


4. Open up some of the reports and look at them. You will begin to understand the range of reports available to you. After you have browsed around for a while, the Recent reports folder will contain all the reports you have opened and looked at recently.



Reports
Recent
13 items

REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Converted Leads by Month		Marketing Reports	Integration User	
Compliance - 14 Days from ...		Compliance Reports	Integration User	
Campaign ROI Analysis Rep...		Marketing Reports	Integration User	
Lead Conversion		Marketing Reports	FCS Sys Admin	
Upcoming Renewals - Next ...		Compliance Reports	Integration User	
Upcoming Renewals - Next ...		Compliance Reports	Integration User	
Territories With Buy Back Co...		Sales Reports	Integration User	
Territories For Resale		Sales Reports	Integration User	
Reserved Territories	Reserved Territories	Sales Reports	Integration User	
Opportunties	All Opportunties	Sales Reports	Integration User	
Opportunity Pipeline	Opportunity Pipeline Report	Sales Reports	Integration User	
Opportunities by Owner & S...		Sales Reports	Integration User	
Opportunity Pipeline		Sales Reports	REC Sales Manager	



Reports
Recent
9 items

REPORT NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
All Jobs by State & Source		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Jobs Historical Trends		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Zero Job Offers By State		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Active Territories by State		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Invoice Status Report		Finance Reports	Integration User	29/08/2018, 11:03...	
Expenses by Franchise		Finance Reports	Integration User	14/03/2018, 9:45 ...	
Expenses by Week		Finance Reports	Integration User	14/03/2018, 9:45 ...	
HO Ops Monthly Sales FYTD		Finance Reports	Integration User	14/03/2018, 9:45 ...	
Payments by Month		Finance Reports	Integration User	14/03/2018, 9:45 ...	

Standard reports

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

Marketing Reports

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

Sales Reports

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

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

DocuSign reports

DocuSign is available for custom implementations only.

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

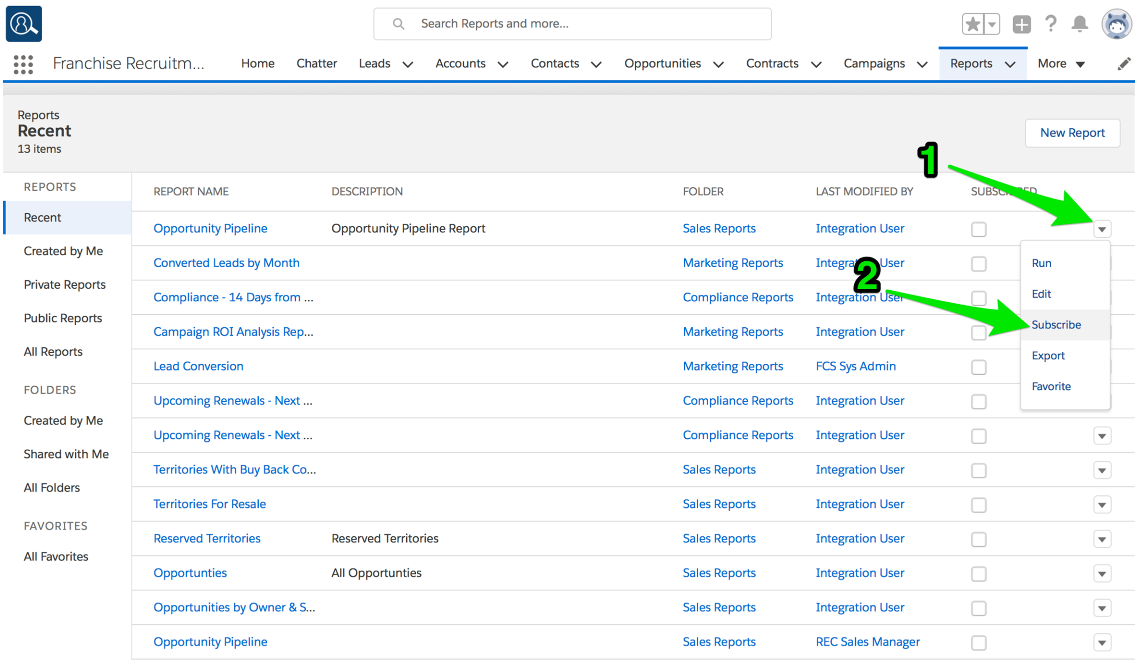
Report Name	Description
Envelopes by Sender this Quarter	Total envelopes sent this quarter by sender.
Envelopes by Sender YTD	Total envelopes sent this year to date by sender.
In Progress Envelopes	Envelopes sent and not voided, deleted or completed.
In Progress Envelopes Older than 72 Hours	All envelopes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

How to run a report

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

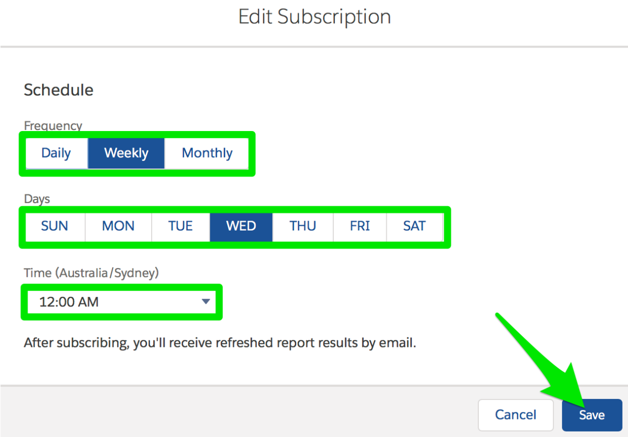
To run a report on a regular schedule

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

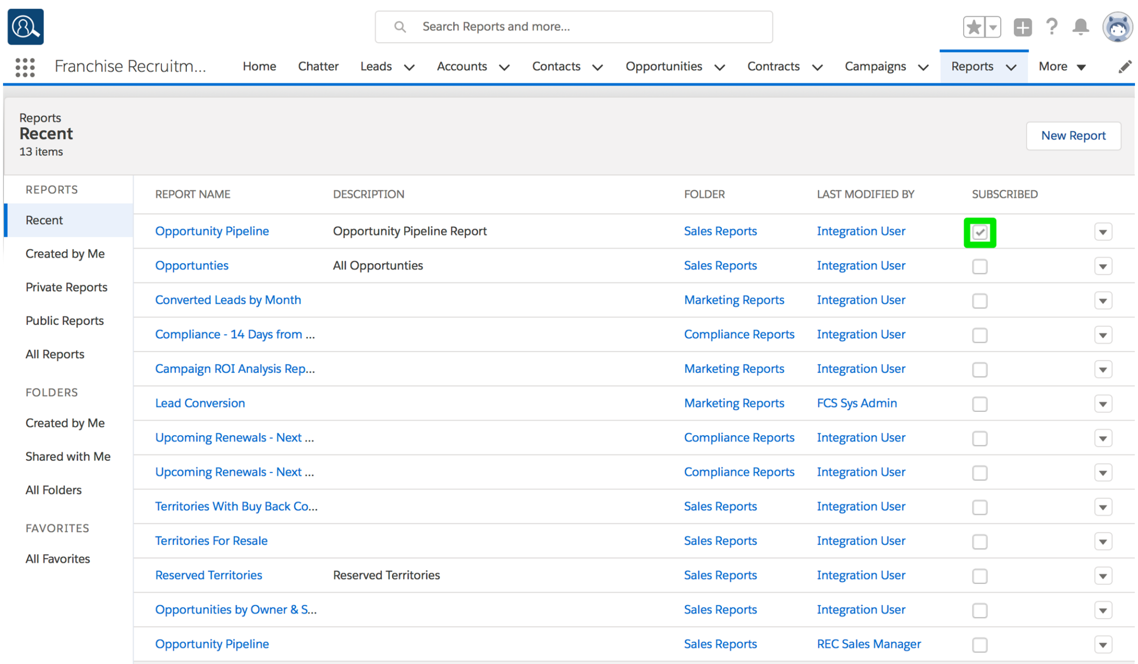


The Edit Subscription dialog box appears.

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



The report is now listed as being subscribed.

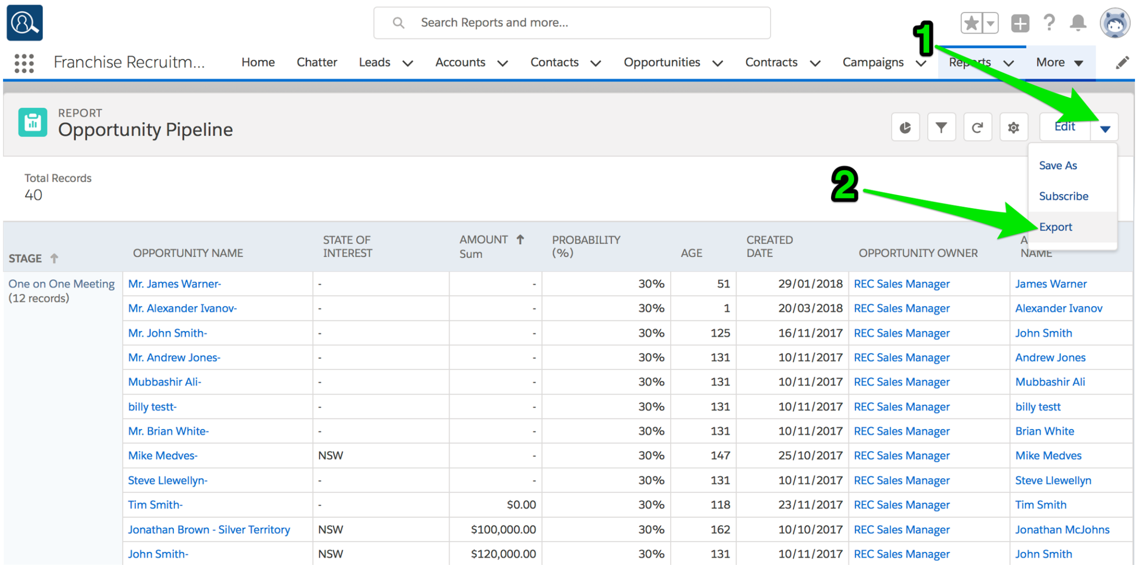


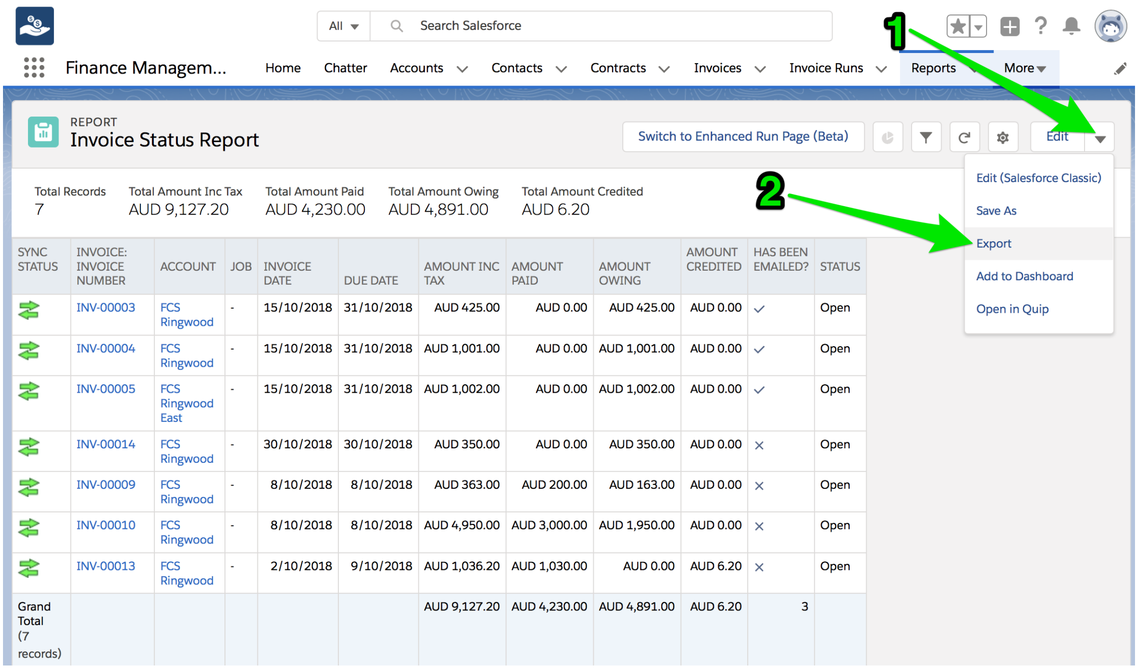
How to export a report

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

To export report results

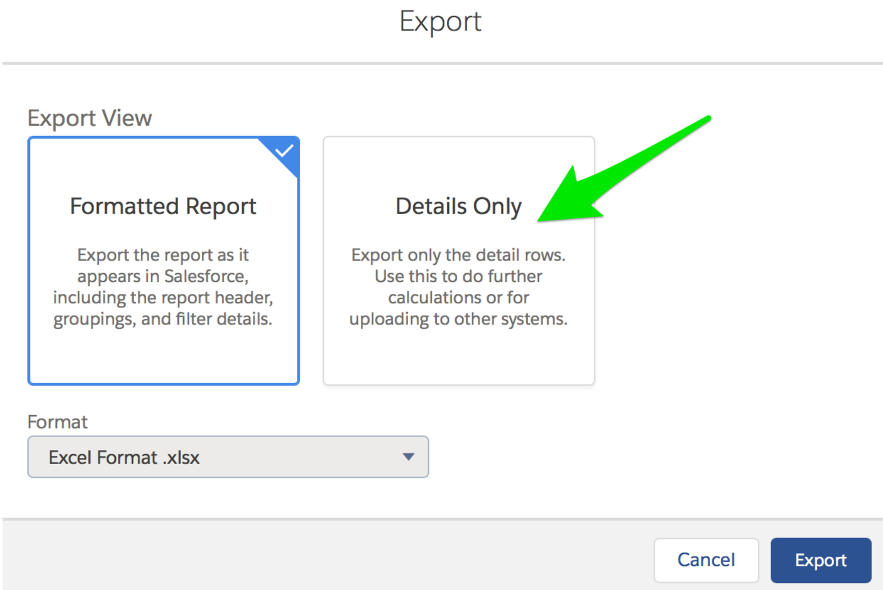
1. From any report, press the **Show more** button then choose **Export**.





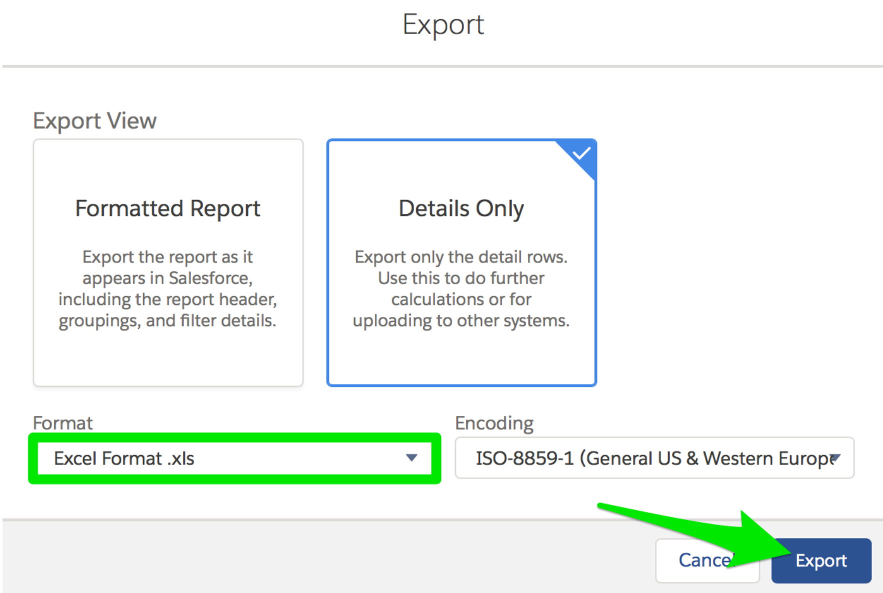
The Export dialog box appears.

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



A **Formatted Report** will appear similar to what you see on-screen and is useful for printing or pasting into emails and reports. A **Details Only** report is preferable for performing further calculations.

3. If you choose Details Only, choose the format you need (*`Excel format .xls`* or *`Comma Delimited .csv`*) then press **Export**.



You will find the exported data in your browser's Downloads folder.

How to print a report

To print a report

1. Export the report. *See* “How to export a report” on page 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.

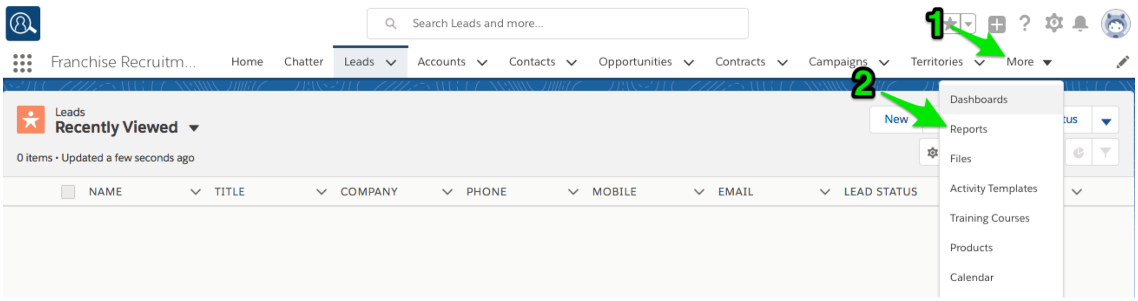
How to add report results as campaign members

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.

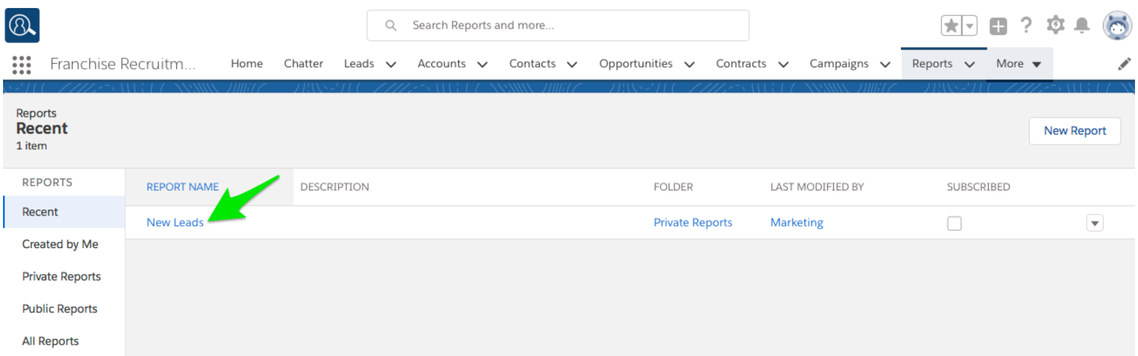
> You need to have `Marketing User` checked in your user information. Your system administrator will need to set this for you.

To add report results as Campaign Members

1. Go to the **Reports** tab.

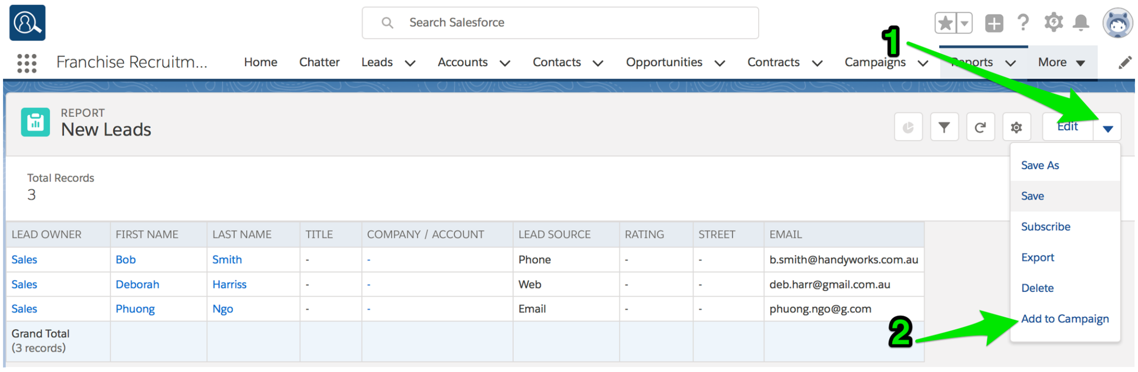


2. Choose a report.



You can now see the report results.

3. From the **Show more** menu, choose **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 Build a new report.

CHAPTER 12

Accessing Help and Support

Product Documentation

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

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

Knowledge Base

Franchise Cloud Solutions maintains a Knowledge Base covering

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

Customers can access the Knowledge Base at any time.

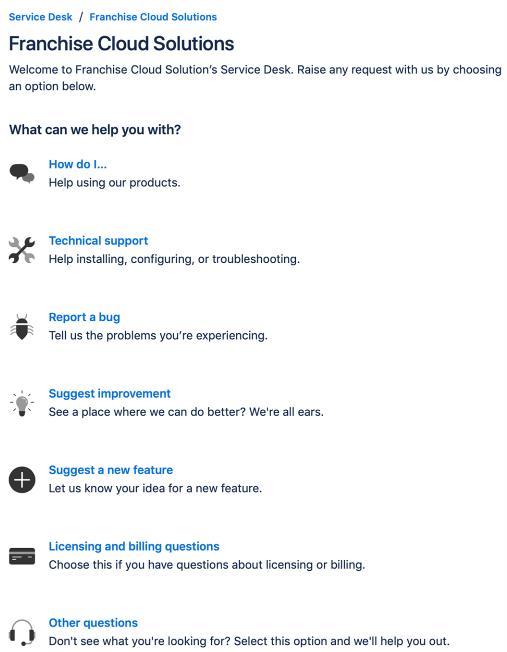
Contacting Customer Support

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

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

Raising Service Requests

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



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

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

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

How to Suggest Improvements or Features

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

We would like to know:

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

Most people only tell us #3.

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

How to Report a Bug

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

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

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

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

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

What is a useful bug report?

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

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

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

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

Here are some tips on writing a good bug report.

How to write a good bug report

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

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

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

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

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

Example Bug Report (minimal)

Summary

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

Description

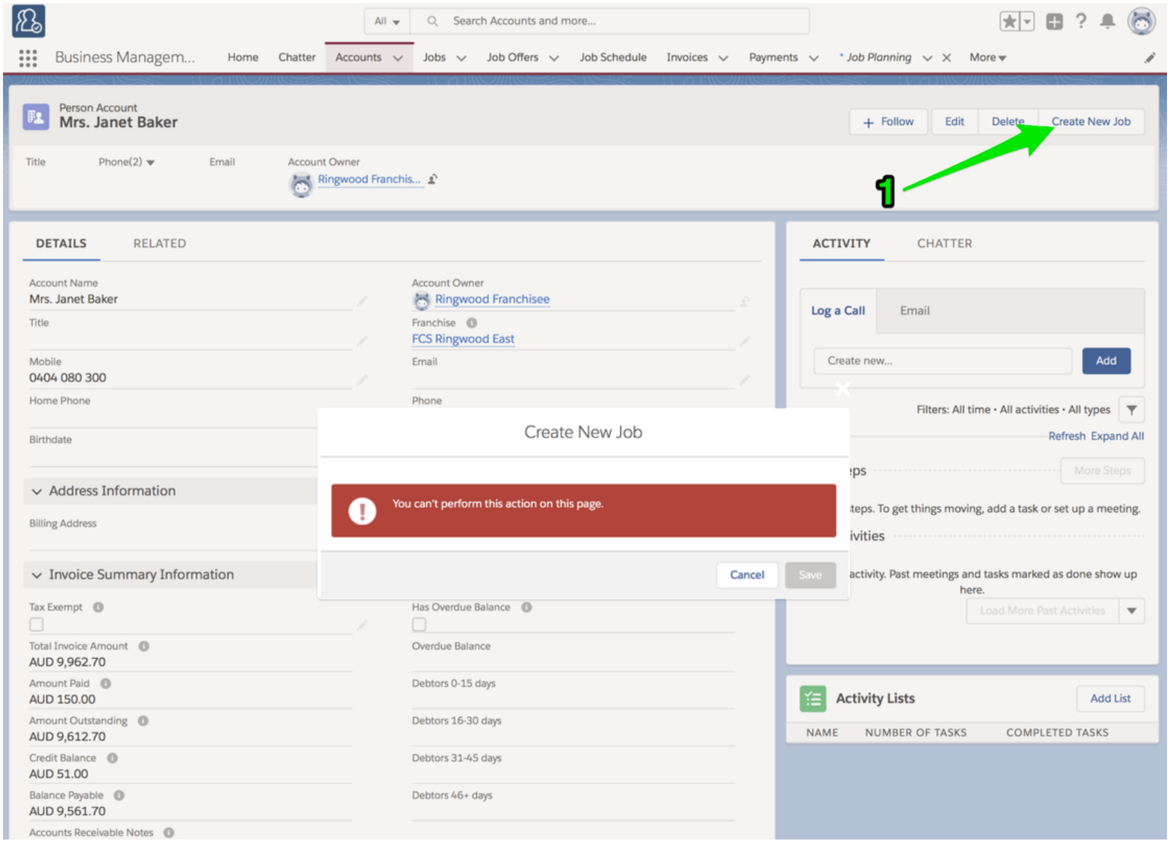
Cannot create new job from a customer's Account page.

To replicate:

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

EXPECT: A new job to be created.

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



Environment

Sandbox.

Google Chrome.

Desktop (Windows 10).

Example Bug Report (technical details)

Summary

Accounts with Financial Integration throw component error on page load

Description

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

Component error throws in both Chrome and Safari.

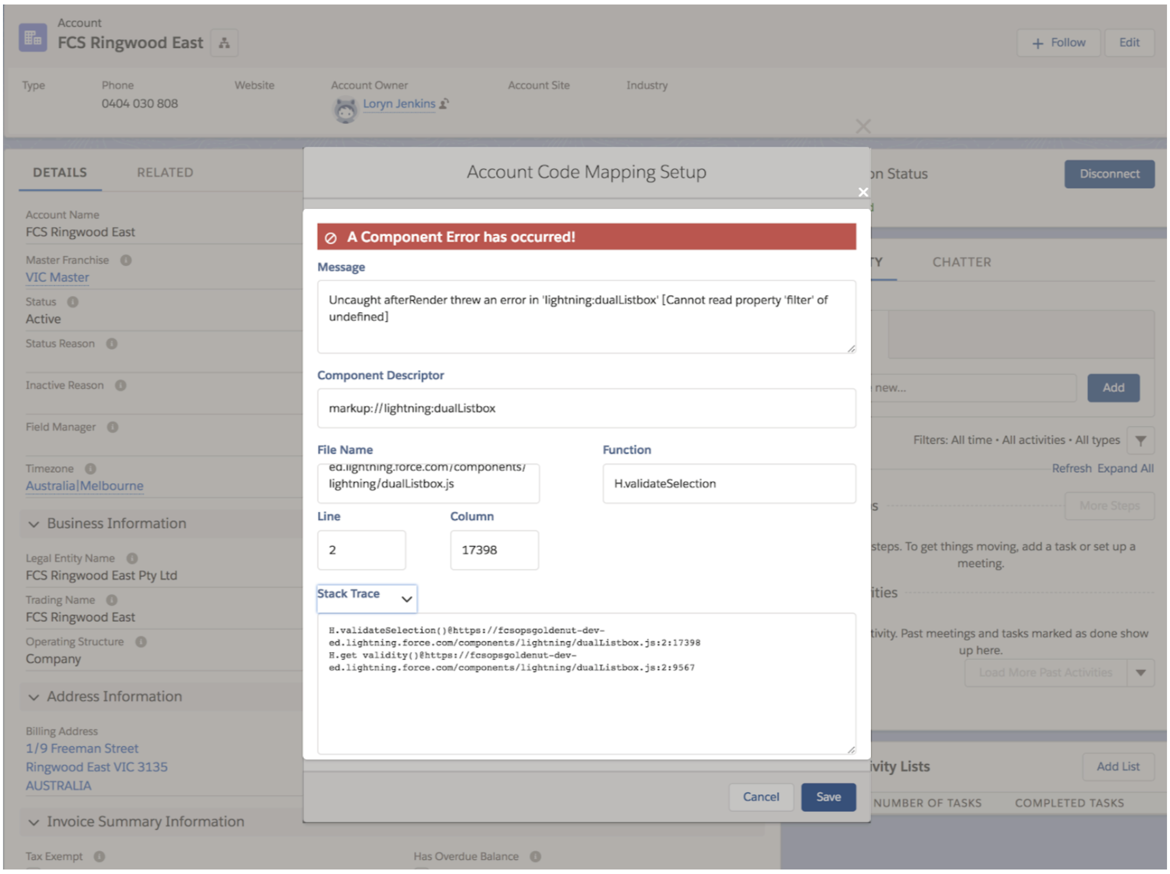
I'm logged into Golden UAT as system administrator.

To replicate

1. Go to the Accounts screen.
2. Choose the **FCS Ringwood East** account.

EXPECT: FCS Ringwood East account displays.

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



Error details

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

Message

```
markup://lightning:dualListbox
```

Component Descriptor

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

Function

```
H.validateSelection
```

Stack Trace

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

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

Environment

Production

Google Chrome OR Safari (BUT NOT Firefox).

MacOS 10.13.

Example Bug Report (medium complexity replication)

Headline

Events on job calendar are clickable only once per instantiation.

Description

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

To replicate:

1. Open calendar.
2. Click on an event. The **Event** dialog box appears.
3. Click the **Cancel** button.
4. Click again on the same event.

EXPECT: Event dialog to re-appear.

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

Further:

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

EXPECT 1: Event dialog to re-appear.

EXPECT 2: Event object unclickable.

ACTUAL: Event object is not clickable.

Environment

Safari & Chrome

Mac OS 10.12

Business Impact

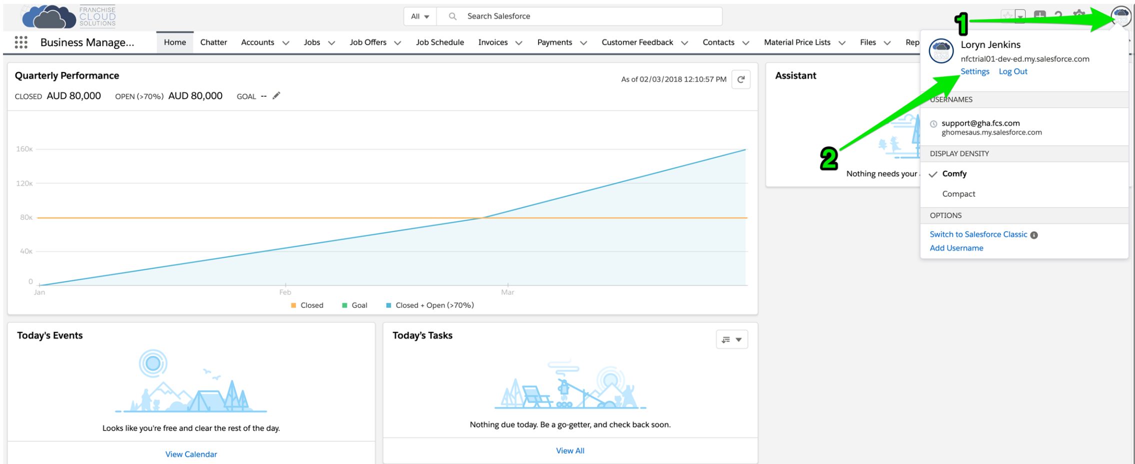
- Who affected: All franchisees, Users of Job Calendar.
- Visibility: 40 times per month per franchisee.
- Block: None.

Granting Account Login Access

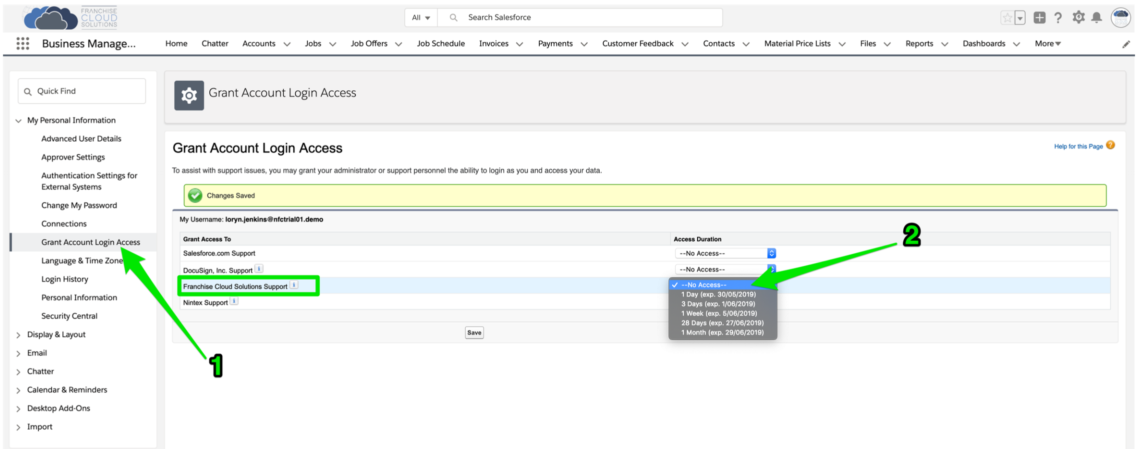
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

To provide our customer support team access to your system

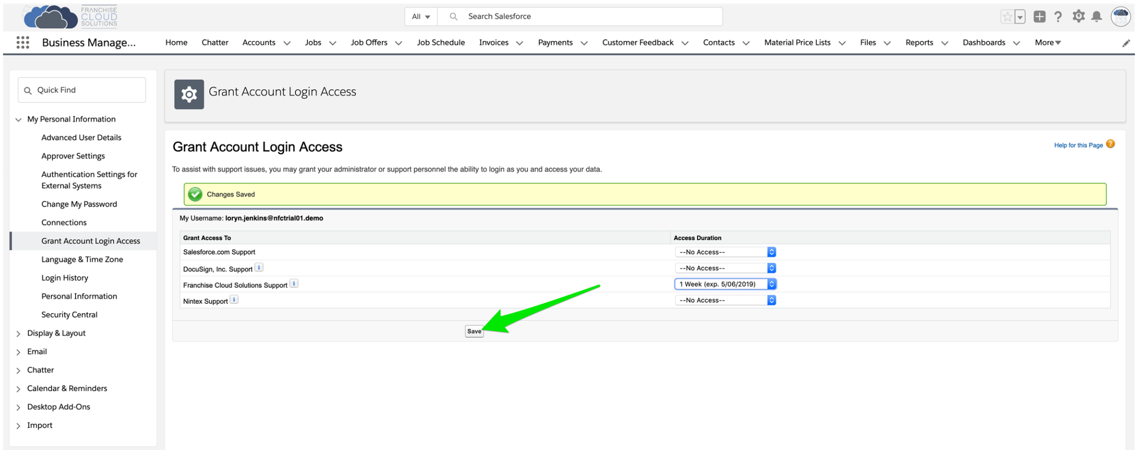
1. Select your account **Settings**.



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



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



> You can revoke access at any time.