



# 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

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# Where to start

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

This guide explains how to use Franchise Recruitment. You can access individual topics in this guide through

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

as shown in the following video.

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



## Get Started with Salesforce

Salesforce, Spring '21



[@salesforcedocs](#)  
Last updated: February 17, 2021



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.

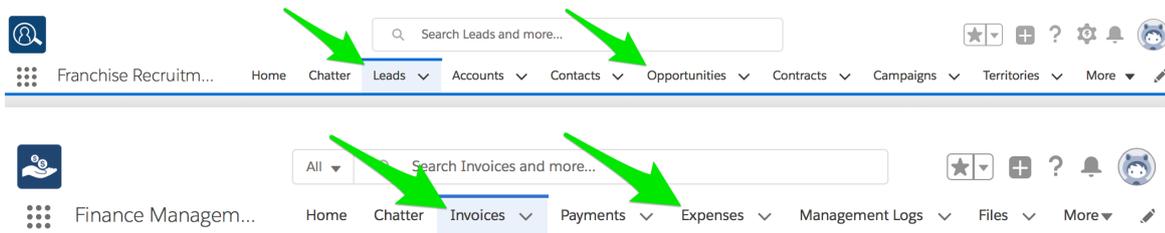


All leads are stored in the list of **Leads**. All opportunities are stored in the list of **Opportunities**, etc.



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

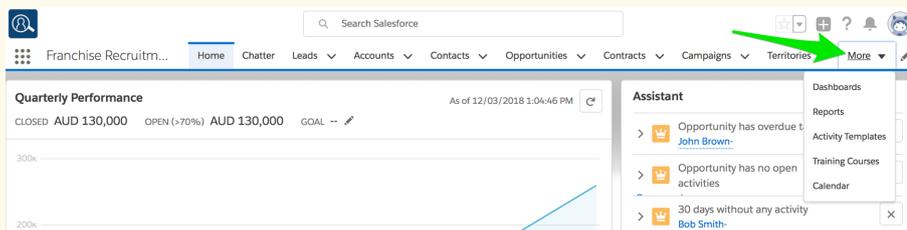
The Salesforce menu provides you access to each different type of record.



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

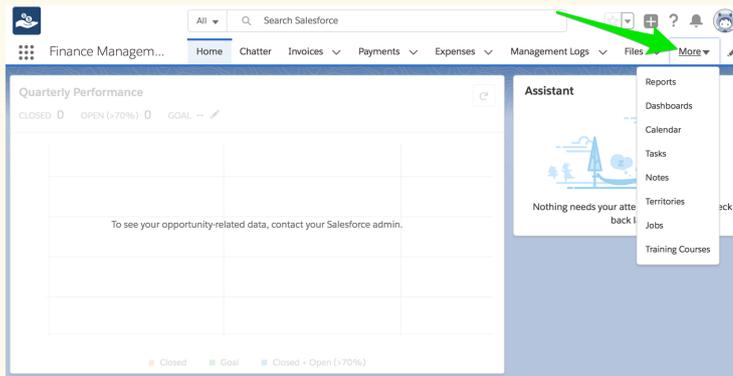


There are likely more menus than can fit on your screen. You can find the rest of the menus under the **More** link.





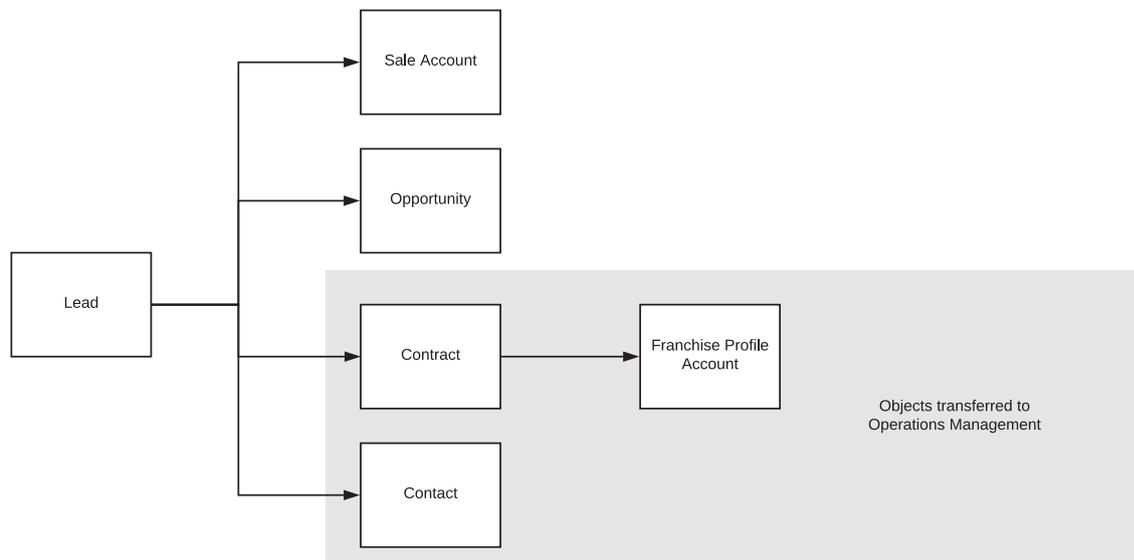
There are likely more menus than can fit on your screen. You can find the rest of the menus under the **More** link.



# Overview

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

The core records within Franchise Recruitment are illustrated below, and described in the following table.



Record	Description
Lead	Captures people’s interest in the purchase of a franchise or in becoming an employee. Structures the lead qualification process into multiple statuses and records the current status. When qualified, Leads are 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.

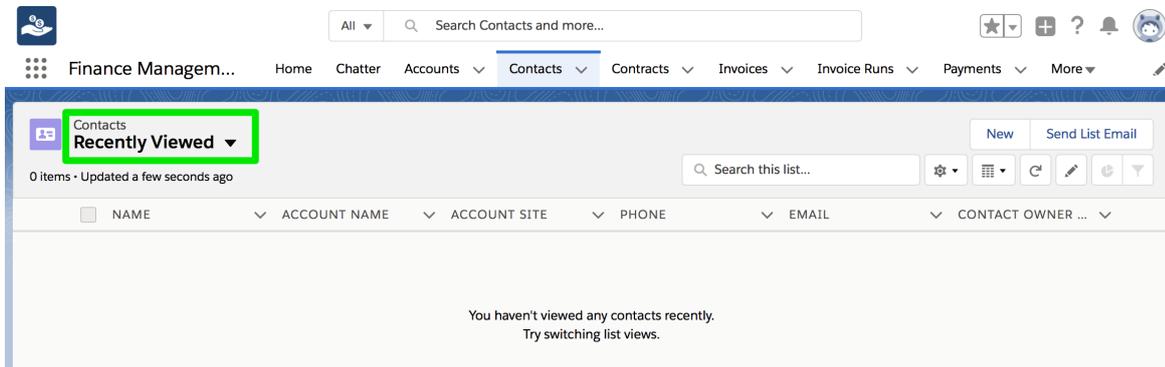
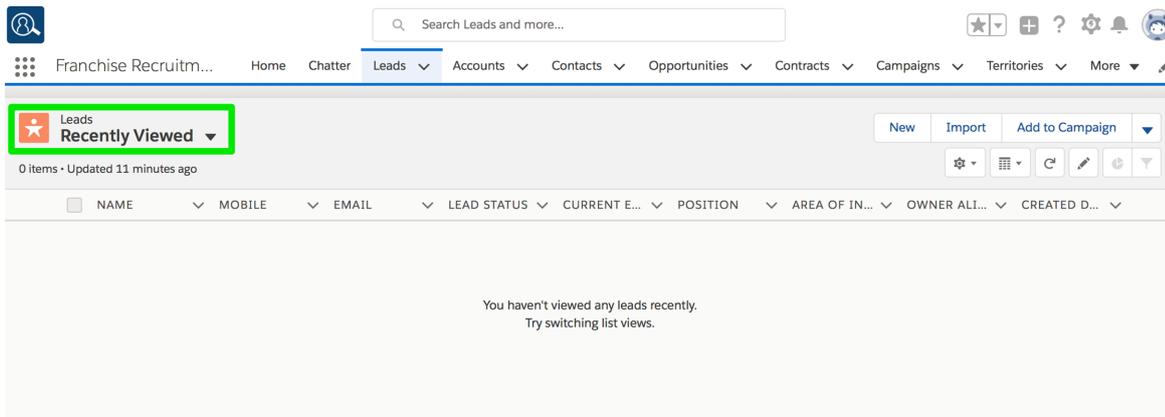
Record	Description
Franchise Profile Account	Generated from the Contract, the Franchise Profile Account becomes the key record representing the franchise. This record can be transferred to the Operations Management product if your organization has licensed it.

# 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.

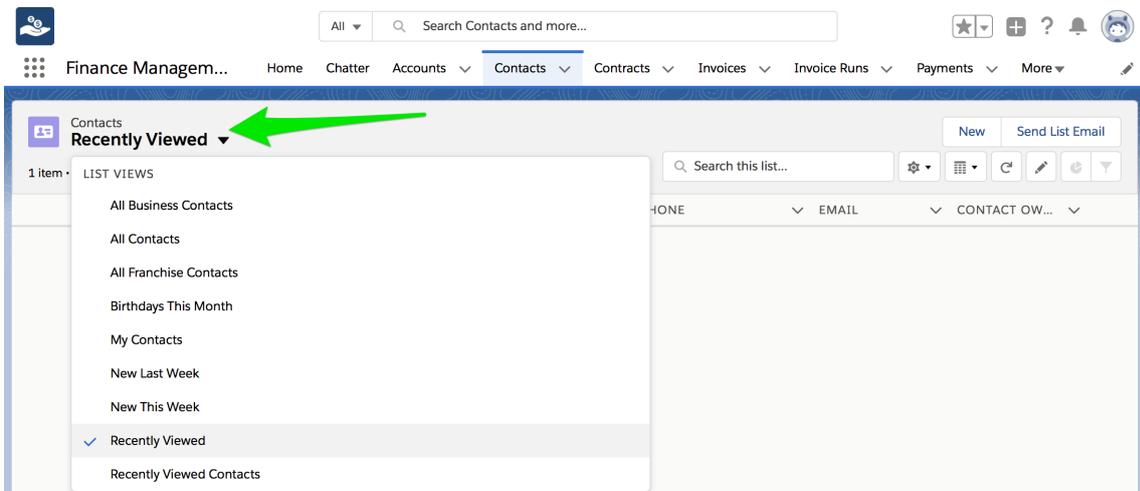
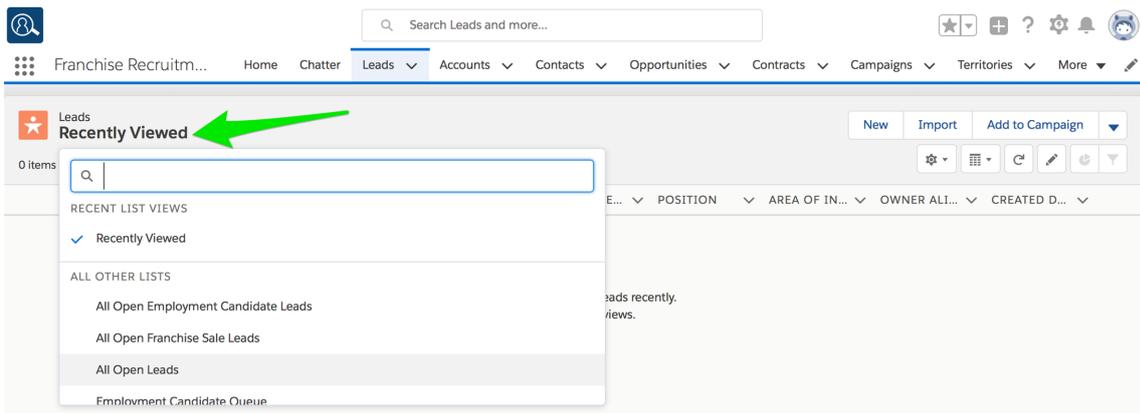
When you first open a menu, the first List View you see is likely to show you an empty list. Salesforce is showing you things you have viewed recently. This is known as the **Recently Viewed List View**.



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

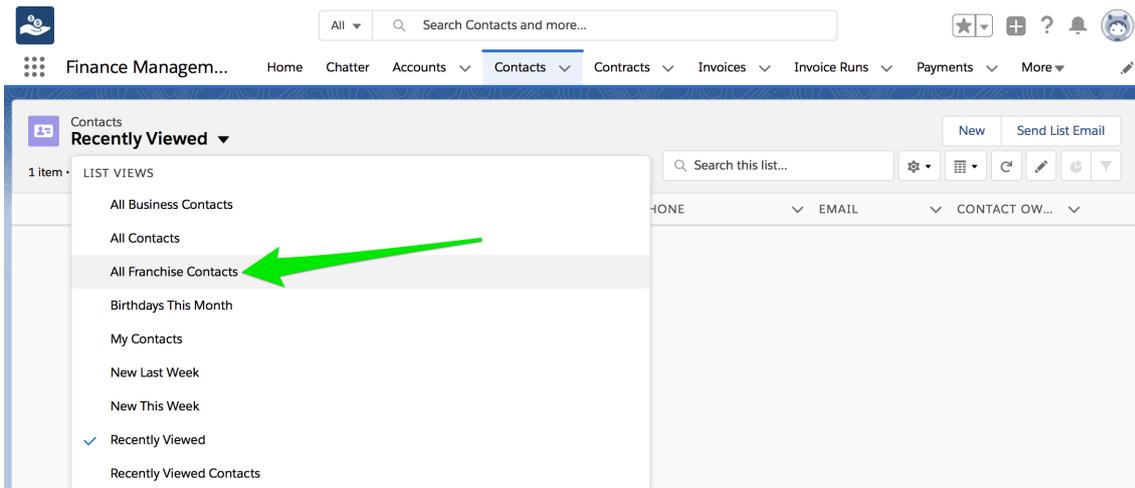
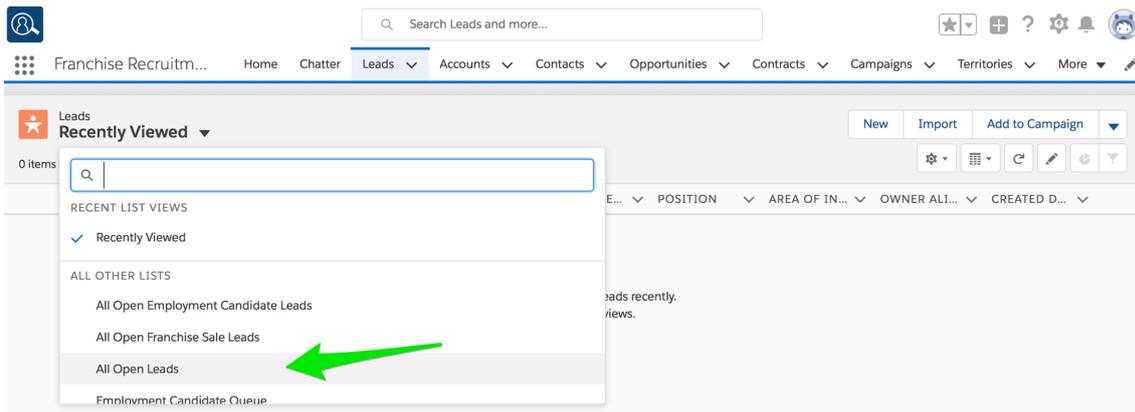
## To see some data

### 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.

Leads  
All Open Leads

50+ Items • Sorted by Name • Filtered by Lead Status • Updated a few seconds ago

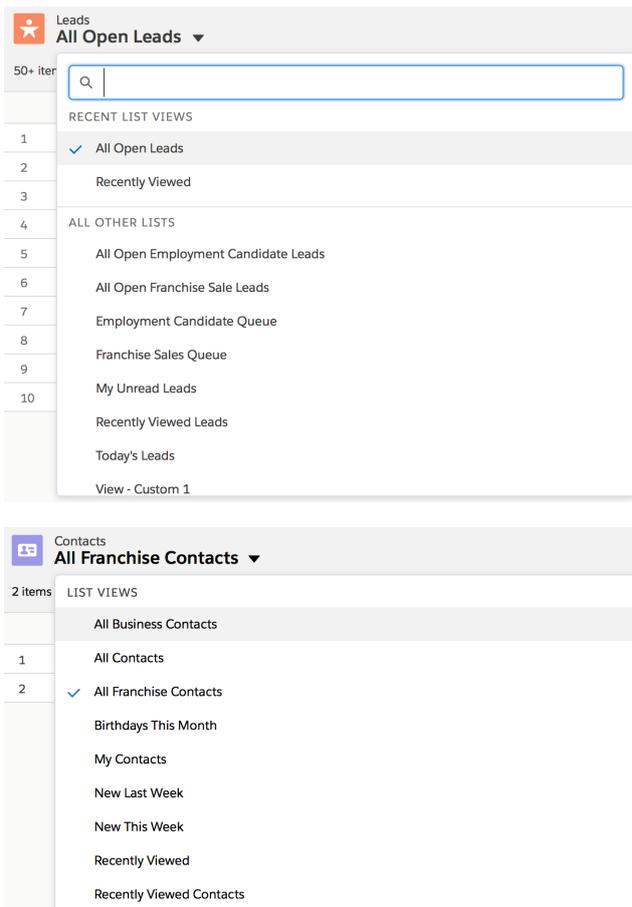
	NAME ↑	STATE/P...	MOBILE	EMAIL	LEAD ST...	CURREN...	POSITION	AREA O...	CREATE...	OWNER ...	UNREAD...
1	Anthony And...	QLD	0424463511	dean.llewell...	New	Novak Pty Ltd	Tradesman	Buy a Franc...	5/09/2017 ...	rsale	<input type="checkbox"/>
2	Arthur Green	QLD	0424463511		In Progress	Jims Mowing	Tradesman	Buy a Franc...	5/07/2017 ...	rsale	<input type="checkbox"/>
3	Bevan Ward	NSW	0424463511		Contacted	Jones Servi...	Tradesman	Buy a Franc...	5/04/2017 ...	rsale	<input type="checkbox"/>
4	Carl Baker	NSW	0424463511		In Progress	City Repairs	Tradesman	Buy a Franc...	5/07/2017 ...	rsale	<input checked="" type="checkbox"/>
5	Christopher ...	NSW	0424463511		Contacted	City Repairs	Tradesman	Buy a Franc...	5/09/2017 ...	rsale	<input checked="" type="checkbox"/>
6	Daniel Walker	NSW	0424463511		In Progress	Jims Mowing	Tradesman	Buy a Franc...	5/09/2017 ...	rsale	<input checked="" type="checkbox"/>
7	David Martin	NSW	0424463511		New	Novak Pty Ltd	Tradesman	Buy a Franc...	5/10/2017 ...	rmark	<input checked="" type="checkbox"/>
8	David Smith	NSW	0424463511		Contacted	Miller Electr...	Tradesman	Buy a Franc...	5/08/2017 ...	rsale	<input type="checkbox"/>
9	Dean Walker	NSW	0424463511		In Progress	Jims Mowing	Tradesman	Buy a Franc...	5/08/2017 ...	smana	<input checked="" type="checkbox"/>
10	Edward John...	NSW	0424463511		New	Andersons ...	Tradesman	Buy a Franc...	5/09/2017 ...	rsale	<input checked="" type="checkbox"/>

Contacts  
All Franchise Contacts

2 Items • Sorted by Name • Filtered by all contacts - Contact Record Type • Updated a few seconds ago

	NAME ↑	ACCOUNT NAME	PHONE	EMAIL	TITLE	CONTACT OW...
1	Ringwood East	FCS Ringwood East	0404 030 808			fmanv
2	Ringwood Franchisee	FCS Ringwood	0404 303 808			LJ

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.

The screenshot shows two screenshots of a CRM interface. The top screenshot is the 'Leads' tab, showing a list of 63 items under 'All Open Leads'. The bottom screenshot is the 'Contacts' tab, showing a list of 2 items under 'All Franchise Contacts'. A green arrow points to the search bar in the 'Leads' tab, and another green arrow points to the 'Contacts' tab in the navigation menu.

**Leads Tab:**

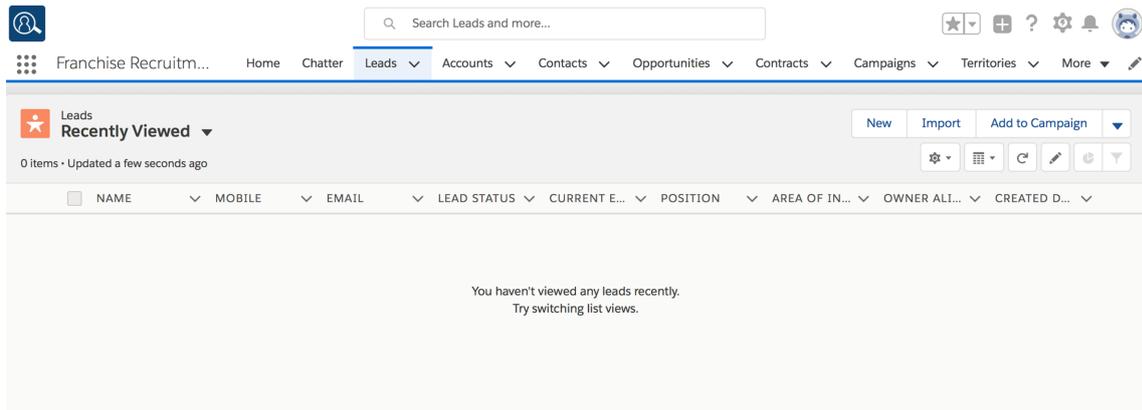
NAME	STATE/P...	MOBILE	EMAIL	LEAD ST...	CURREN...	POSITION	AREA O...	CREATE...	OWNER ...	UNREAD...
Anthony And...	QLD	0424463511	dean.llewell...	New	Novak Pty Ltd	Tradesman	Buy a Franc...	5/09/2017 ...	rsale	<input type="checkbox"/>
Arthur Green	QLD	0424463511		In Progress	Jims Mowing	Tradesman	Buy a Franc...	5/07/2017 ...	rsale	<input type="checkbox"/>
Bevan Ward	NSW	0424463511		Contacted	Jones Servi...	Tradesman	Buy a Franc...	5/04/2017 ...	rsale	<input type="checkbox"/>
Carl Baker	NSW	0424463511		In Progress	City Repairs	Tradesman	Buy a Franc...	5/07/2017 ...	rsale	<input checked="" type="checkbox"/>
Christopher ...	NSW	0424463511		Contacted	City Repairs	Tradesman	Buy a Franc...	5/09/2017 ...	rsale	<input checked="" type="checkbox"/>
Daniel Walker	NSW	0424463511		In Progress	Jims Mowing	Tradesman	Buy a Franc...	5/09/2017 ...	rsale	<input checked="" type="checkbox"/>
David Martin	NSW	0424463511		New	Novak Pty Ltd	Tradesman	Buy a Franc...	5/10/2017 ...	rmark	<input checked="" type="checkbox"/>
David Smith	NSW	0424463511		Contacted	Miller Electr...	Tradesman	Buy a Franc...	5/08/2017 ...	rsale	<input type="checkbox"/>
Dean Walker	NSW	0424463511		In Progress	Jims Mowing	Tradesman	Buy a Franc...	5/08/2017 ...	smana	<input checked="" type="checkbox"/>
Edward John...	NSW	0424463511		New	Andersons ...	Tradesman	Buy a Franc...	5/09/2017 ...	rsale	<input checked="" type="checkbox"/>

**Contacts Tab:**

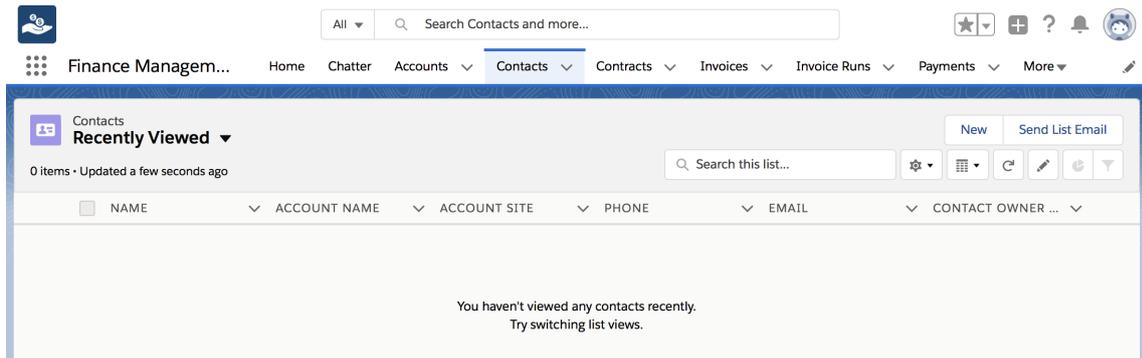
NAME	ACCOUNT NAME	PHONE	EMAIL	TITLE	CONTACT OW...
Ringwood East	FCS Ringwood East	0404 030 808			fmanv
Ringwood Franchisee	FCS Ringwood	0404 303 808			LJ

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.



The screenshot shows the Salesforce interface for the 'Leads' object. The 'Recently Viewed' list view is active, showing 0 items. The list view is empty, with a message: 'You haven't viewed any leads recently. Try switching list views.' The list view columns are: NAME, MOBILE, EMAIL, LEAD STATUS, CURRENT E..., POSITION, AREA OF IN..., OWNER ALL..., and CREATED D... The top navigation bar includes 'Franchise Recruitm...', 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Contracts', 'Campaigns', 'Territories', and 'More'.



The screenshot shows the Salesforce interface for the 'Contacts' object. The 'Recently Viewed' list view is active, showing 0 items. The list view is empty, with a message: 'You haven't viewed any contacts recently. Try switching list views.' The list view columns are: NAME, ACCOUNT NAME, ACCOUNT SITE, PHONE, EMAIL, and CONTACT OWNER... The top navigation bar includes 'Finance Managem...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Invoices', 'Invoice Runs', 'Payments', and 'More'.

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.

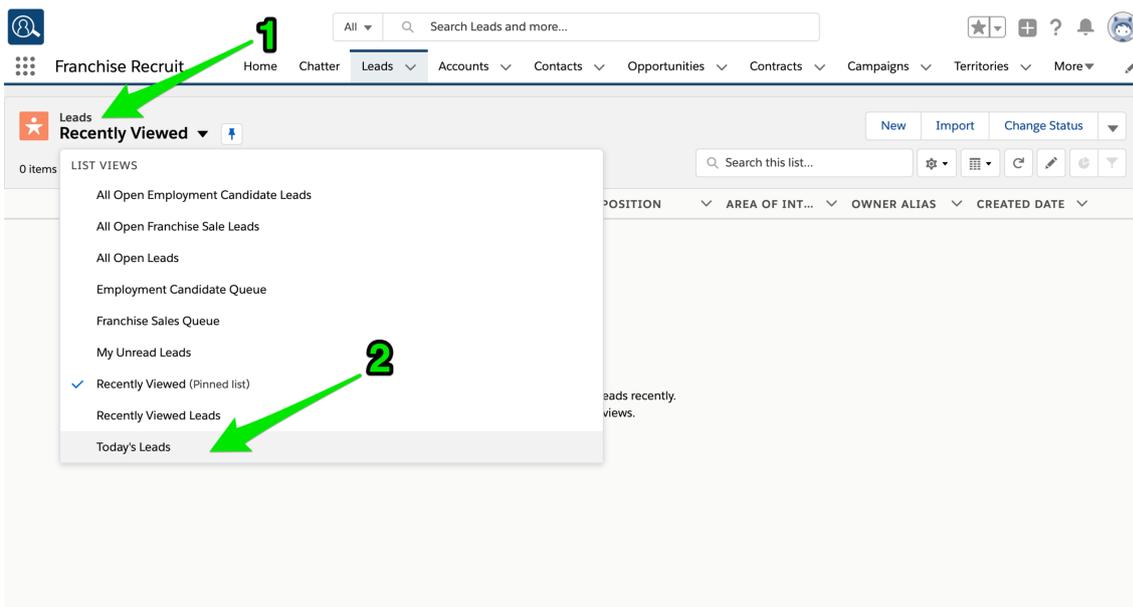
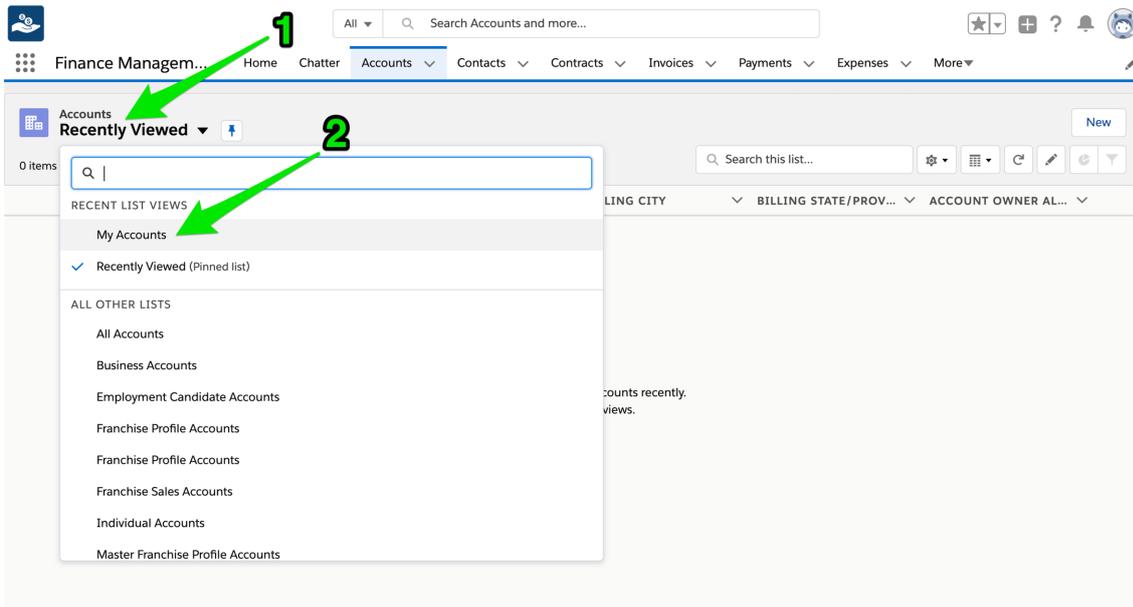


When you select the Leads tab, the only leads you see on the Recently Viewed list are the ones you have already visited. For some job roles, it is more important to see the incoming leads rather than the ones that have already been visited.

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.

The screenshot shows the 'Finance Management' interface. The 'Accounts' tab is active, displaying a list titled 'My Accounts'. A green arrow points to a pin icon next to the list title. Below the list, a table shows one account: 'FCS AUSTRALIA' in NSW with phone number '02 9503 0500' and owner 'OHOM'.

ACCOUNT NAME ↑	BILLING STATE/PROVINCE ↓	PHONE	TYPE	ACCOUNT OWNER ALIAS ↓
1 FCS AUSTRALIA	NSW	02 9503 0500		OHOM

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

The screenshot shows the 'Finance Management' interface with the 'Leads' tab active. The 'Today's Leads' list view is displayed, and a green circle highlights the pin icon next to its title. The table below shows one lead: 'David Gover' in VIC with email 'dg@gmail.com', status 'New', and date '27/02/2019 3:01 PM'.

NAME ↑	COMPANY	STATE/P...	EMAIL	LEAD ST...	CREATED DATE	OWNER ALIAS	UNREAD ...
1 David Gover		VIC	dg@gmail.com	New	27/02/2019 3:01 PM	Franchise Sales Queue	<input checked="" type="checkbox"/>



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.

The screenshot displays two screenshots of a software interface. The top screenshot shows the 'Leads' section with a list view named 'All Open Leads'. It contains 63 items, sorted by 'Created Date' and filtered by 'Lead Status'. The table lists various leads with columns for Name, State, Mobile, Email, Lead Status, Current Status, Position, Area, Created Date, Owner, and Unread status.

	NAME	STATE/P...	MOBILE	EMAIL	LEAD ST...	CURREN...	POSITION	AREA O...	CREAT...	OWNER ...	UNREAD...
1	Greg Stephens	VIC	0444448884	greg.stephe...	New		Plumber	Employmen...	5/03/2018 ...	Employmen...	<input checked="" type="checkbox"/>
2	Employee				Contacted			Employmen...	5/03/2018 ...	Jannis	<input type="checkbox"/>
3	Robert Smith		0405307043	jack.kenny...	New			Buy a Franc...	21/02/201...	Franchise S...	<input checked="" type="checkbox"/>
4	James Brown	NSW	0400000000	mike@franc...	New			Buy a Franc...	20/12/201...	Franchise S...	<input checked="" type="checkbox"/>
5	Mike Medves			mike@franc...	In Progress			Buy a Franc...	23/10/201...	rsale	<input type="checkbox"/>
6	test converted		0414444444		New			Buy a Franc...	6/10/2017 ...	fsys	<input type="checkbox"/>
7	Robert Jacks...	NSW	0424463511		New	TradeZone	Tradesman	Buy a Franc...	5/10/2017 ...	rsale	<input checked="" type="checkbox"/>
8	John Ali	NSW	0424463511		New	Bunnings	Executive	Buy a Franc...	5/10/2017 ...	rsale	<input checked="" type="checkbox"/>
9	Michael Wrig...	NSW	0424463511		New	Allens Elect...	Tradesman	Buy a Franc...	5/10/2017 ...	rsale	<input checked="" type="checkbox"/>

The bottom screenshot shows the 'Invoices' section with a list view named 'All'. It contains 9 items, sorted by 'Invoice Number' and filtered by 'all invoices'. The table lists invoices with columns for Invoice Number, Amount, Status, Created By, Created Date, Due Date, and Has status.

	INVOICE ...	AMOUNT	STATUS	CREATED BY	CREATED ...	DUE DATE	HAS
1	CR-00002	AUD 0.00	Closed	Ringwood Franchisee	20/08/2018 ...		<input type="checkbox"/>
2	CR-00003	AUD 150.00	Open	Ringwood Franchisee	20/08/2018 ...		<input type="checkbox"/>
3	CR-00004	AUD 0.00	Open	Ringwood Franchisee	20/08/2018 ...		<input type="checkbox"/>
4	CR-00004	AUD 60.00	Open	Ringwood Franchisee	20/08/2018 ...		<input type="checkbox"/>
5	CR-00005	AUD 100.00	Open	Ringwood Franchisee	20/08/2018 ...		<input type="checkbox"/>
6	INV-00001	AUD 380.00	Closed	Ringwood Franchisee	17/08/2018 ...	17/08/2018	<input type="checkbox"/>
7	INV-00002	AUD 475.00	Open	Ringwood Franchisee	20/08/2018 ...	20/08/2018	<input type="checkbox"/>
8	INV-00006	AUD 300.00	Closed	Ringwood Franchisee	21/08/2018 ...	21/08/2018	<input checked="" type="checkbox"/>
9	INV-00007	AUD 175.00	Open	Ringwood Franchisee	21/08/2018 ...	21/08/2018	<input type="checkbox"/>

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

The screenshot shows the 'Leads' section of the Franchise Recruitment system. The page title is 'Leads All Open Leads' with 63 items. The table lists leads with columns for Name, State, Mobile, Email, Lead Status, Current Status, Position, and Area. A green arrow labeled '1' points to the list view control icon (a gear with a list symbol) in the top right corner. A second green arrow labeled '2' points to the 'Clone' option in the 'LIST VIEW CONTROLS' dropdown menu that appears after clicking the icon.

	NAME	STATE/P...	MOBILE	EMAIL	LEAD ST...	CURREN...	POSITION	AREA O...
1	Greg Stephens	VIC	0444448884	greg.stephe...	New		Plumber	Employment
2	Employee				Contacted		Employment	
3	Robert Smith		0405307043	jack.kenny...	New		Buy a Franc...	
4	James Brown	NSW	0400000000	mike@franc...	New		Buy a Franc...	
5	Mike Medves			mike@franc...	In Progress		Buy a Franc...	
6	test converted		0414444444		New		Buy a Franc...	
7	Robert Jacks...	NSW	0424463511		New	TradeZone	Tradesman	Buy a Franc...
8	John Ali	NSW	0424463511		New	Bunnings	Executive	Buy a Franc...
9	Michael Wrig...	NSW	0424463511		New	Allens Elect...	Tradesman	Buy a Franc...

The screenshot shows the 'Invoices' section of the Franchise Recruitment system. The page title is 'Invoices All' with 9 items. The table lists invoices with columns for Invoice Number, Amount, Status, and Created By. A green arrow labeled '1' points to the list view control icon (a gear with a list symbol) in the top right corner. A second green arrow labeled '2' points to the 'Clone' option in the 'LIST VIEW CONTROLS' dropdown menu that appears after clicking the icon.

	INVOICE ...	AMOUNT	STATUS	CREATED BY	CREAT
1	CR-00002	AUD 0.00	Closed	Ringwood Franchisee	20/08
2	CR-00003	AUD 150.00	Open	Ringwood Franchisee	20/08
3	CR-00004	AUD 0.00	Open	Ringwood Franchisee	20/08
4	CR-00004	AUD 60.00	Open	Ringwood Franchisee	20/08
5	CR-00005	AUD 100.00	Open	Ringwood Franchisee	20/08
6	INV-00001	AUD 380.00	Closed	Ringwood Franchisee	17/08
7	INV-00002	AUD 475.00	Open	Ringwood Franchisee	20/08
8	INV-00006	AUD 300.00	Closed	Ringwood Franchisee	21/08
9	INV-00007	AUD 175.00	Open	Ringwood Franchisee	21/08

The Clone List View dialog box appears.

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

Clone List View

\*List Name

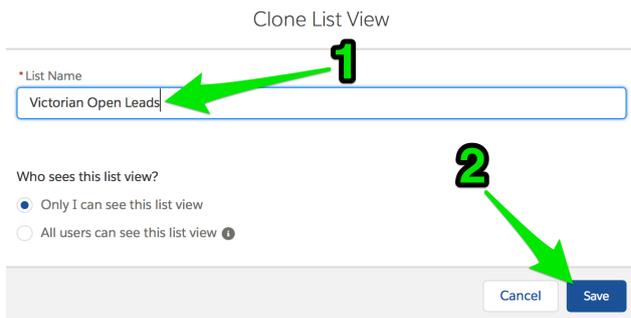
Victorian Open Leads

Who sees this list view?

Only I can see this list view

All users can see this list view ⓘ

Cancel Save



Clone List View

\*List Name

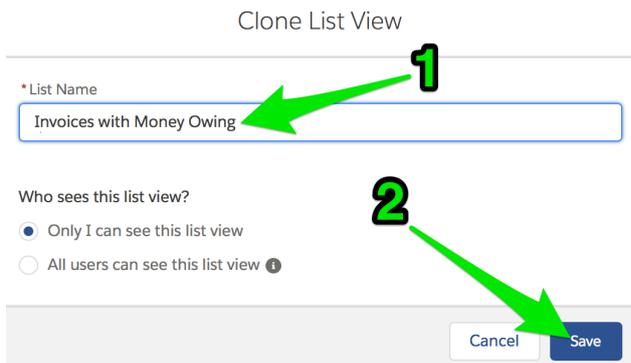
Invoices with Money Owing

Who sees this list view?

Only I can see this list view

All users can see this list view ⓘ

Cancel Save



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

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

The screenshot shows the 'Leads' section of the Franchise Recruitment system. The page title is 'Victorian Open Leads' and it displays 50+ items. A filter dialog box is open, allowing the user to add a new filter condition. The dialog box has three main sections: 'Field', 'Operator', and 'Value'. The 'Field' dropdown is set to '# Leads', the 'Operator' dropdown is set to 'equals', and the 'Value' field is empty. The 'Done' button is visible at the bottom of the dialog. On the right side of the screen, there is a 'Filters' panel showing the current filter: 'Lead Status does not contain closed'. Below this, there is a 'New Filter\*' button and 'Add Filter' and 'Remove All' links.

ID	Name	State	MO...	EM...	LEA...	CU...	PO...	ARE...	C...	OW...	UN...
1	Greg St...	VIC	04444...	greg.st...	New	Plumber	Empl...	5/03/...	Empl...	<input checked="" type="checkbox"/>	
2	Employ...				Contact...		Empl...	5/03/...	Jannis	<input type="checkbox"/>	
3	Robert ...		04053...	jack.ke...	New		Buy a F...	21/02...	Franchi...	<input checked="" type="checkbox"/>	
4	James ...	NSW	04000...	mike@...	New						
5	Mike M...			mike@...	In Prog...						
6	test con...		04144...		New						
7	Robert ...	NSW	04244...		New	TradeZ...					
8	John Ali	NSW	04244...		New	Bunnin...					
9	Michael...	NSW	04244...		New	Allens ...					
10	William...	NSW	04244...		New	Steven...					
11	David ...	NSW	04244...		New	Novak ...					
12	Richard...	NSW		dean.ll...	New	Jones ...					
13	Joseph ...	NSW	04244...		Contact...	A.B Bui...					
14	Thomas...	NSW	04244...		Contact...	Pauls B...					

The screenshot shows the 'Invoices' section of the Franchise Recruitment system. The page title is 'Invoices with Money Owning' and it displays 9 items. A filter dialog box is open, allowing the user to add a new filter condition. The dialog box has three main sections: 'Field', 'Operator', and 'Value'. The 'Field' dropdown is set to 'Account Age', the 'Operator' dropdown is set to 'equals', and the 'Value' field is empty. The 'Done' button is visible at the bottom of the dialog. On the right side of the screen, there is a 'Filters' panel showing the current filter: 'Filter by Owner All invoices'. Below this, there is a 'New Filter\*' button and 'Add Filter' and 'Remove All' links.

ID	INVOICE ...	AMOUNT	STATUS	CREATED BY	CREATED ...
1	CR-00002	AUD 0.00	Closed	Disposed Expenses	20/08/2018
2	CR-00003	AUD 150.00			
3	CR-00004	AUD 0.00			
4	CR-00004	AUD 60.00			
5	CR-00005	AUD 100.00			
6	INV-00001	AUD 380.00			
7	INV-00002	AUD 475.00			
8	INV-00006	AUD 300.00			
9	INV-00007	AUD 175.00			

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

Leads  
Victorian Open Leads

50+ Items • Sorted by Unread By Owner • Filtered by Lead Status • Updated a few seconds ago

	NAME	STA...	MO...	EM...	LEA...	CU...	PO...	ARE...	CRE...	OW...	U...
1	Greg St...	VIC	04444...	greg.st...	New	Plumber	Emplo...	5/03/...	Emplo...	✓	
2	Robert ...		04053...	jack.ke...	New		Buy a F...	21/02...	Franchi...	✓	
3	James ...	NSW	04000...	mike@...	New		Buy a F...	20/12...	Franchi...	✓	
4	Roger Hill	NSW	04244...		Contact...	Workw...					
5	Ryan Cl...	NSW	04244...		Contact...	All Car...					
6	Carl Ba...	NSW	04244...		In Prog...	City Re...					
7	Henry T...	NSW	04244...		In Prog...	Pauls B...					
8	Harold ...	NSW	04244...		New	Miller ...					
9	Peter Cl...	NSW	04244...		New	Jones ...					
10	Patrick ...	NSW	04244...		New	Novak ...					
11	Walter ...	NSW	04244...		New	Steven...					
12	Jerry W...	NSW	04244...		New	Anders...					
13	Joshua ...	NSW	04244...		In Prog...	CBD E...					
14	Gregory...	NSW	04244...		In Prog...	Cosgro...					

Filters

Show me All leads

Matching all of these filters

Lead Status does not contain closed

New Filter\*

Add Filter Remove All

Add Filter Logic

Invoices  
Invoices with Money Owing

9 items • Sorted by Invoice Number • Filtered by all invoices • Updated 2 minutes ago

	INVOICE ...	AMOUNT	STATUS	CREATED BY	CREATED ...
1	CR-00002	AUD 0.00	Closed	Dina...	20/08/2018
2	CR-00003	AUD 150.00			
3	CR-00004	AUD 0.00			
4	CR-00004	AUD 60.00			
5	CR-00005	AUD 100.00			
6	INV-00001	AUD 380.00			
7	INV-00002	AUD 475.00			
8	INV-00006	AUD 300.00			
9	INV-00007	AUD 175.00			

Cancel Save

Filter by Owner All invoices

Matching all of these filters

New Filter\*

Add Filter Remove All

Add Filter Logic

## 6. Now press Save.

Franchise Recruitm... Home Chatter **Leads** Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads **Victorian Open Leads** New Import Change Status

50+ Items • Sorted by Unread by Owner • Filtered by Lead Status • Updated 3 minutes ago

	NAME	STA...	MO...	EM...	LEA...	CU...	PO...	ARE...	CRE...	OW...	U...
1	Greg St...	VIC	04444...	greg.st...	New	Plumber	Emplo...	5/03/...	Emplo...		
2	Robert ...		04053...	jack.ke...	New		Buy a F...	21/02...	Franchi...		
3	James ...	NSW	04000...	mike@...	New		Buy a F...	20/12...	Franchi...		
4	Roger Hill	NSW	04244...		Contac...	Workw...	Trades...	Buy a F...	5/07/...	rsale	
5	Ryan Cl...	NSW	04244...		Contac...	All Car...	Trades...	Buy a F...	5/07/...	rsale	
6	Carl Ba...	NSW	04244...		In Prog...	City Re...	Trades...	Buy a F...	5/07/...	rsale	
7	Henry T...	NSW	04244...		In Prog...	Pauls B...	Trades...	Buy a F...	5/07/...	rsale	
8	Harold ...	NSW	04244...		New	Miller ...	Trades...	Buy a F...	5/07/...	rsale	
9	Peter Cl...	NSW	04244...		New	Jones ...	Trades...	Buy a F...	5/07/...	rsale	
10	Patrick ...	NSW	04244...		New	Novak ...	Trades...	Buy a F...	5/07/...	rsale	
11	Walter ...	NSW	04244...		New	Steven...	Trades...	Buy a F...	5/07/...	rsale	
12	Jerry W...	NSW	04244...		New	Anders...	Trades...	Buy a F...	5/07/...	rsale	

Cancel Save

Show me All leads

Matching all of these filters

Lead Status does not contain closed

State/Province\* equals VIC

Add Filter Remove All

Add Filter Logic

Finance Managem... Home Chatter **Invoices** Payments Expenses Management Logs Files More

Invoices **Invoices with Money Owig** New

9 items • Sorted by Invoice Number • Filtered by all invoices • Updated 5 minutes ago

	INVOICE ...	AMOUNT	STATUS	CREATED BY	CREATED ...
1	CR-00002	AUD 0.00	Closed	Ringwood Franchisee	20/08/2018...
2	CR-00003	AUD 150.00	Open	Ringwood Franchisee	20/08/2018...
3	CR-00004	AUD 0.00	Open	Ringwood Franchisee	20/08/2018...
4	CR-00004	AUD 60.00	Open	Ringwood Franchisee	20/08/2018...
5	CR-00005	AUD 100.00	Open	Ringwood Franchisee	20/08/2018...
6	INV-00001	AUD 380.00	Closed	Ringwood Franchisee	17/08/2018...
7	INV-00002	AUD 475.00	Open	Ringwood Franchisee	20/08/2018...
8	INV-00006	AUD 300.00	Closed	Ringwood Franchisee	21/08/2018...
9	INV-00007	AUD 175.00	Open	Ringwood Franchisee	21/08/2018...

Cancel Save

Filter by Owner All invoices

Matching all of these filters

Amount Owig\* greater than 0

Add Filter Remove All

Add Filter Logic

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

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads  
Victorian Open Leads

1 item • Sorted by Unread By Owner • Filtered by Lead Status, State/Province • Updated 3 minutes ago

NAME	STA...	MO...	EM...	LEA...	CU...	PO...	ARE...	CRE...	OW...	U...
1	Greg St...	VIC	04444...	greg.st...	New	Plumber	Emplo...	5/03/...	Emplo...	

Filters

Show me All leads

Matching all of these filters

- Lead Status does not contain closed
- State/Province equals VIC

Add Filter Remove All

Add Filter Logic

Finance Managem... Home Chatter Invoices Payments Expenses Management Logs Files More

Invoices  
Invoices with Money Owng

5 items • Sorted by Invoice Number • Filtered by all invoices - Amount Owng • Updated a few seconds ago

INVOICE ...	AMOUNT	STATUS	CREATED BY	CREATED ...
1 CR-00003	AUD 150.00	Open	Ringwood Franchisee	20/08/2018...
2 CR-00004	AUD 60.00	Open	Ringwood Franchisee	20/08/2018...
3 CR-00005	AUD 100.00	Open	Ringwood Franchisee	20/08/2018...
4 INV-00002	AUD 475.00	Open	Ringwood Franchisee	20/08/2018...
5 INV-00007	AUD 175.00	Open	Ringwood Franchisee	21/08/2018...

Filters

Filter by Owner All invoices

Matching all of these filters

- Amount Owng greater than AUD 0

Add Filter Remove All

Add Filter Logic

Now you can see your newly modified list view.

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads  
Victorian Open Leads

1 item • Sorted by Unread By Owner • Filtered by Lead Status, State/Province • Updated 4 minutes ago

NAME	STATE/P...	MOBILE	EMAIL	LEAD ST...	CURREN...	POSITION	AREA O...	CREATE...	OWNER ...	UNRE...
1	Greg Stephens	VIC	0444448884	greg.stephe...	New	Plumber	Employmen...	5/03/2018 ...	Employmen...	

Finance Managem... Home Chatter Invoices Payments Expenses Management Logs Files More

Invoices  
Invoices with Money Owing

5 items • Sorted by Invoice Number • Filtered by all invoices - Amount Owing • Updated 2 minutes ago

INVOICE ...	AMOUNT	STATUS	CREATED BY	CREATED ...	DUE DATE	HAS BEE...
1 CR-00003	AUD 150.00	Open	Ringwood Franchisee	20/08/2018 ...		<input type="checkbox"/>
2 CR-00004	AUD 60.00	Open	Ringwood Franchisee	20/08/2018 ...		<input type="checkbox"/>
3 CR-00005	AUD 100.00	Open	Ringwood Franchisee	20/08/2018 ...		<input type="checkbox"/>
4 INV-00002	AUD 475.00	Open	Ringwood Franchisee	20/08/2018 ...	20/08/2018	<input type="checkbox"/>
5 INV-00007	AUD 175.00	Open	Ringwood Franchisee	21/08/2018 ...	21/08/2018	<input type="checkbox"/>



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.

Leads Recently Viewed

3 items • Updated a minute ago

<input type="checkbox"/>	NAME	MOBILE	EMAIL	LEAD STATUS	CURRENT E...	POSITION	AREA	CREATED D...
<input type="checkbox"/>	1	George King	dean.llewellyn+...	New	Bills Hardware	Tradesman	Buy a F	5/09/2017 3:4...
<input type="checkbox"/>	2	James Brown	0400000000	mike@franchis...	New		Buy a F	20/12/2017 3:...
<input type="checkbox"/>	3	Richard Ward	dean.llewellyn+...	New	Jones Services	Tradesman	Buy a F	5/10/2017 2:2...

LIST VIEW CONTROLS

- New
- Clone
- Rename
- Sharing Settings
- Show List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

Contacts All Contacts

5 items • Sorted by Name • Filtered by all contacts • Updated 27 minutes ago

Search this list...

<input type="checkbox"/>	NAME	ACCOUNT NAME	TITLE	PHONE	EM	CONTACT ...
<input type="checkbox"/>	1	Greg Cleary	Greg Cleary			rfran
<input type="checkbox"/>	2	Janet Baker	Janet Baker			rfran
<input type="checkbox"/>	3	Mark Williams	Mark Williams		mar	rfran
<input type="checkbox"/>	4	Ringwood East	FCS Ringwood East	0404 030 808		fmanv
<input type="checkbox"/>	5	Ringwood Franchisee	FCS Ringwood	0404 303 808		LJ

LIST VIEW CONTROLS

- New
- Clone
- Rename
- Sharing Settings
- Edit List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

2. Enter the new List Name and press Save.

New List View

\*List Name  
My New Leads

Who sees this list view?  
 Only I can see this list view  
 All users can see this list view

Cancel Save

New List View

\*List Name  
VIC Contacts

Who sees this list view?  
 Only I can see this list view  
 All users can see this list view  
 Share list view with groups of users

Cancel Save

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

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

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads My New Leads

50+ items - Sorted by Name - Updated a few seconds ago

	NAME	EMAIL	COMPA...	STATE/...	LEAD ST...	UNREA...	CREATE...	OWNER...
1	Anthony An...	dean.llewel...		QLD	New	<input type="checkbox"/>	5/09/2017...	rsale
2	Arthur Green			QLD	In Progress	<input type="checkbox"/>	5/07/2017...	rsale
3	Bevan Ward			NSW	Contacted	<input type="checkbox"/>	5/04/2017...	rsale
4	Carl Baker			NSW	In Progress	<input type="checkbox"/>	5/07/2017...	rsale
5	Christopher...			NSW	Contacted	<input checked="" type="checkbox"/>	5/09/2017...	rsale

Filters  
Show me My leads  
Add Filter Remove All

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 a few seconds ago

	NAME	ACCOUNT NAME	PHONE	EMAIL	TITLE	CONT...
1	Ringwood East	FCS Ringwood East	0404 030 808			fmanv

Filters  
Filter by Owner My contacts  
Add Filter Remove All

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

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads My New Leads 50+ items • Sorted by Name • Updated 3 minutes ago

Field: **1** Lead Status

Operator: **2** New

Done **3**

Filters: Show me My leads. Matching all of these filters. New Filter\*. Add Filter. Remove All. Add Filter Logic.

Finance Managem... Home Chatter Accounts Contacts Invoices Invoice Runs Payments More

Contacts VIC Contacts 1 item • Sorted by Name • Filtered by my contacts • Updated 3 minutes ago

Field: **1** Mailing State/Province

Operator: **2** equals

Value: **3** VIC

Done **4**

Filters: Filter by Owner My contacts. Matching all of these filters. New Filter\*. Add Filter. Remove All. Add Filter Logic.

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

## 5. Press Save.

Franchise Recruitment... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads My New Leads

50+ items • Sorted by Name • Updated 6 minutes ago

	NAME	EMAIL	COMPA...	STATE/...	LEAD ST...	UNREA...	CREATE...	OWNER...
1	Anthony An...	dean.llewel...		QLD	New	<input type="checkbox"/>	5/09/2017...	rsale
2	Arthur Green			QLD	In Progress	<input type="checkbox"/>	5/07/2017...	rsale
3	Bevan Ward			NSW	Contacted	<input type="checkbox"/>	5/04/2017...	rsale
4	Carl Baker			NSW	In Progress	<input checked="" type="checkbox"/>	5/07/2017...	rsale
5	Christopher...			NSW	Contacted	<input checked="" type="checkbox"/>	5/09/2017...	rsale
6	Daniel Walker			NSW	In Progress	<input checked="" type="checkbox"/>	5/09/2017...	rsale
7	David Smith			NSW	Contacted	<input type="checkbox"/>	5/08/2017...	rsale
8	Edward Joh...			NSW	New	<input checked="" type="checkbox"/>	5/09/2017...	rsale
9	Frank Kelly			NSW	New	<input checked="" type="checkbox"/>	5/08/2017...	rsale
10	Gabriel Taylor			NSW	Exhausted	<input type="checkbox"/>	5/07/2017...	rsale

Cancel Save

Show me My leads

Matching all of these filters

Lead Status\* equals New

Add Filter Remove All

Add Filter Logic

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

	NAME	ACCOUNT NAME	PHONE	EMAIL	TITLE	CONT...
1	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.

Leads  
**My New Leads** ▾

25 items • Sorted by Name • Filtered by Lead Status • Updated a few seconds ago

	NAME ↑	EMAIL	COMPAN...	STATE/...	LEAD ST...	UNREA...	CREATE...	OWNER...
1	<input type="checkbox"/> Anthony An...	dean.llewel...		QLD	New	<input type="checkbox"/>	5/09/2017...	rsale
2	<input type="checkbox"/> Edward Joh...			NSW	New	<input checked="" type="checkbox"/>	5/09/2017...	rsale
3	<input type="checkbox"/> Frank Kelly			NSW	New	<input checked="" type="checkbox"/>	5/08/2017...	rsale
4	<input type="checkbox"/> Gary Walker			NSW	New	<input checked="" type="checkbox"/>	5/09/2017...	rsale
5	<input type="checkbox"/> Harold Moore			NSW	New	<input checked="" type="checkbox"/>	5/07/2017...	rsale
6	<input type="checkbox"/> Jeffrey Robi...			NSW	New	<input checked="" type="checkbox"/>	5/08/2017...	rsale
7	<input type="checkbox"/> Jerry Wright			NSW	New	<input checked="" type="checkbox"/>	5/07/2017...	rsale
8	<input type="checkbox"/> John Ali			NSW	New	<input checked="" type="checkbox"/>	5/10/2017...	rsale
9	<input type="checkbox"/> Jose Lee			NSW	New	<input checked="" type="checkbox"/>	5/08/2017...	rsale
10	<input type="checkbox"/> Kenneth Co...			NSW	New	<input checked="" type="checkbox"/>	5/09/2017...	rsale

Filters

Show me My leads

Matching all of these filters

Lead Status equals New

Add Filter Remove All

Add Filter Logic

Contacts  
**VIC Contacts** ▾

1 item • Sorted by Name • Filtered by my contacts - Mailing State/Province • Updated a few seconds ago

	NAME ↑	ACCOUNT NAME	PHONE	EMAIL	TITLE	CONT...
1	<input type="checkbox"/> Ringwood East	FCS Ringwood East	0404 030 808			fmanv

Filters

Filter by Owner My contacts

Matching all of these filters

Mailing State/Province equals VIC

Add Filter Remove All

Add Filter Logic

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

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads **My New Leads** New Import Change Status

25 items • Sorted by Name • Filtered by Lead Status • Updated 2 minutes ago

	NAME ↑	EMAIL	COMPANY	STATE/PROVI...	LEAD STATUS	UNREAD BY O...	CREATED DATE	OWNER ALIAS
1	Anthony Anderson	dean.llewellyn+fw...		QLD	New	<input type="checkbox"/>	5/09/2017 3:48 P...	rsale
2	Edward Johnson			NSW	New	<input checked="" type="checkbox"/>	5/09/2017 3:48 P...	rsale
3	Frank Kelly			NSW	New	<input checked="" type="checkbox"/>	5/08/2017 3:48 P...	rsale
4	Gary Walker			NSW	New	<input checked="" type="checkbox"/>	5/09/2017 3:48 P...	rsale
5	Harold Moore			NSW	New	<input checked="" type="checkbox"/>	5/07/2017 3:48 P...	rsale
6	Jeffrey Robinson			NSW	New	<input checked="" type="checkbox"/>	5/08/2017 3:48 P...	rsale
7	Jerry Wright			NSW	New	<input checked="" type="checkbox"/>	5/07/2017 3:48 P...	rsale
8	John Ali			NSW	New	<input checked="" type="checkbox"/>	5/10/2017 2:29 P...	rsale
9	Jose Lee			NSW	New	<input checked="" type="checkbox"/>	5/08/2017 3:48 P...	rsale
10	Kenneth Cooper			NSW	New	<input checked="" type="checkbox"/>	5/09/2017 3:48 P...	rsale

Finance Managem... Home Chatter Accounts Contacts Contracts Invoices Invoice Runs Payments More

Contacts **VIC Contacts** New Send List Email

1 item • Sorted by Name • Filtered by my contacts - Mailing State/Province • Updated a few seconds ago

Search this list...

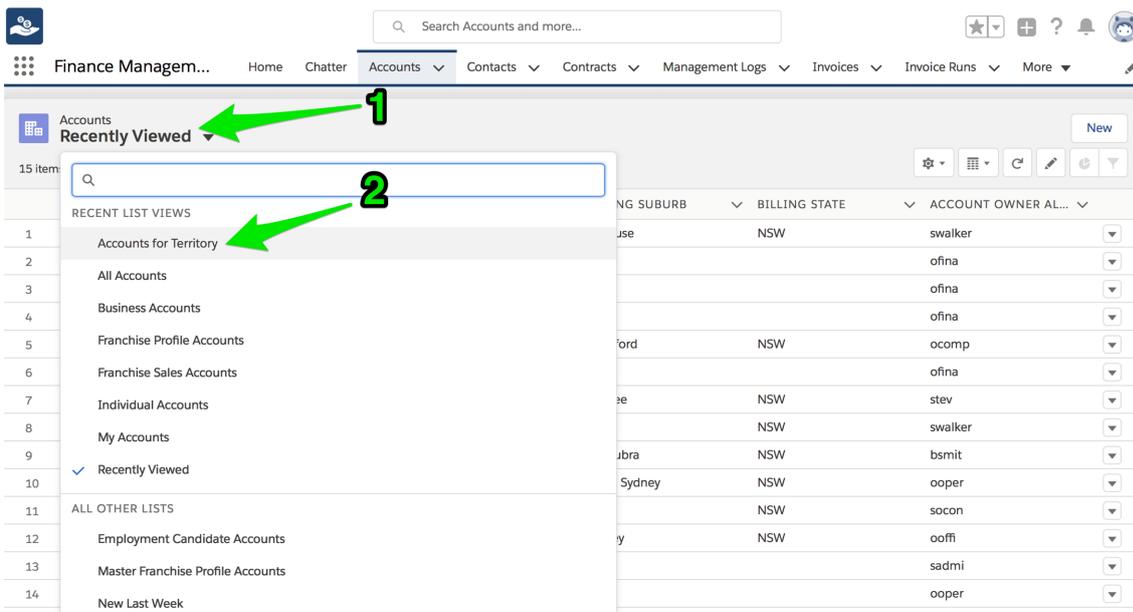
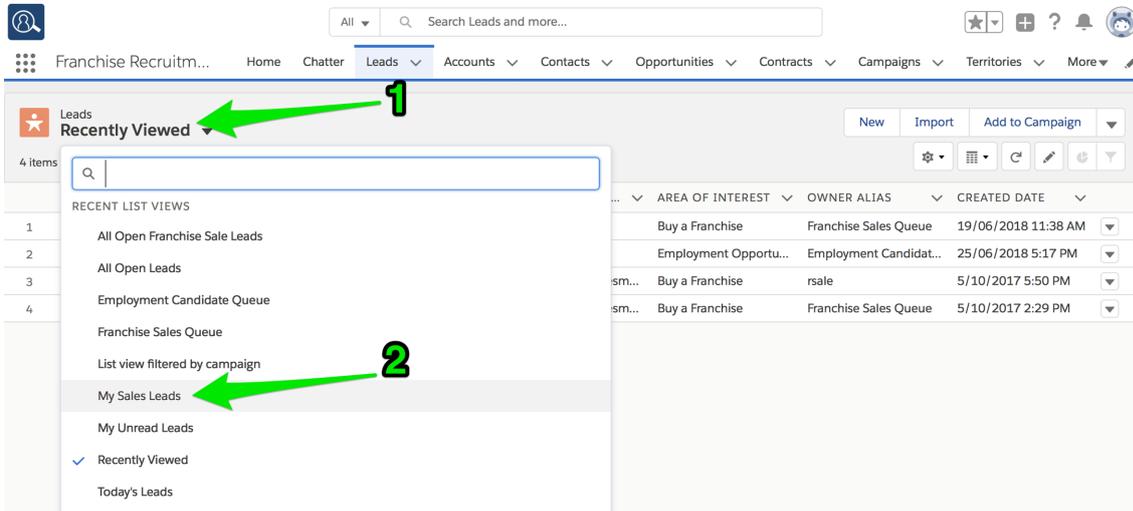
	NAME ↑	ACCOUNT NAME	PHONE	EMAIL	TITLE	CONTACT OW...
1	Ringwood East	FCS Ringwood East	0404 030 808			fmanv

# How to add columns to a list view

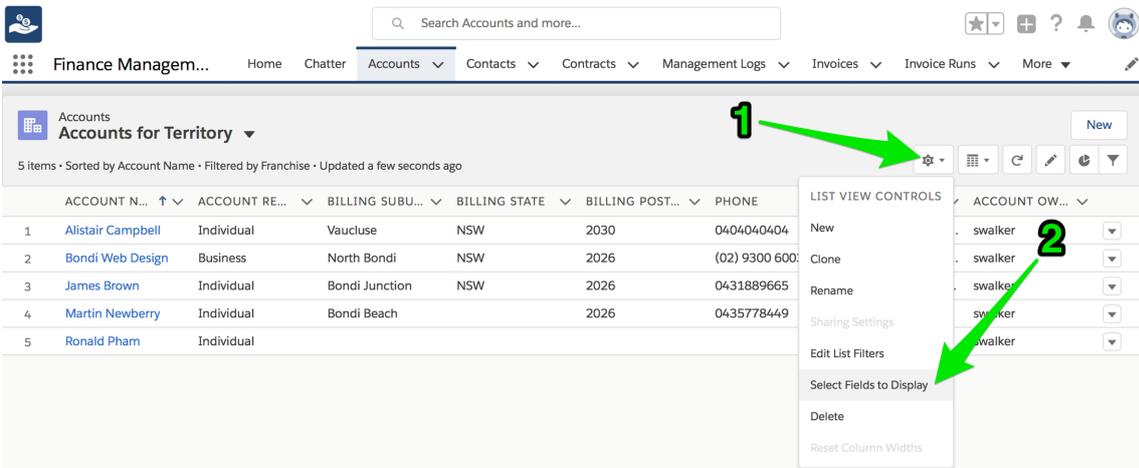
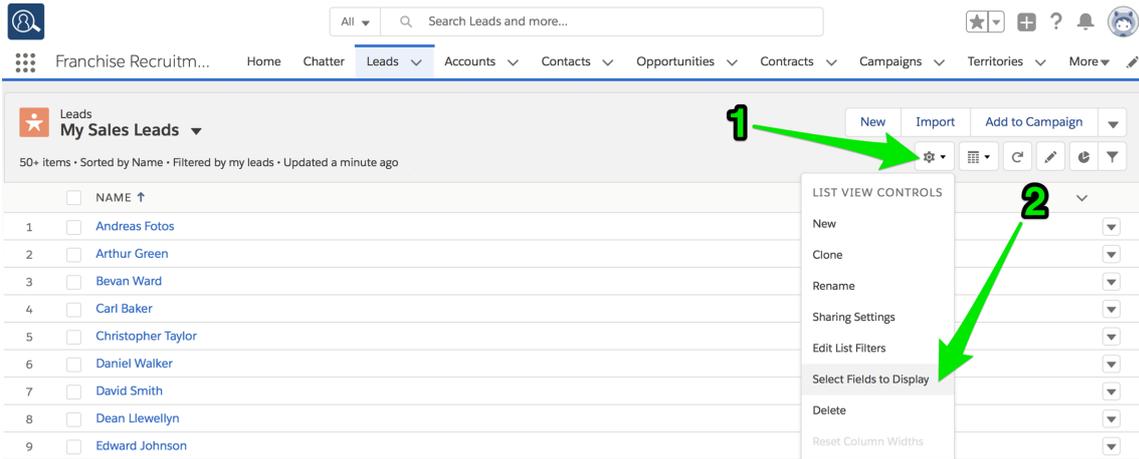
You can add columns to any custom list view.

## 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.

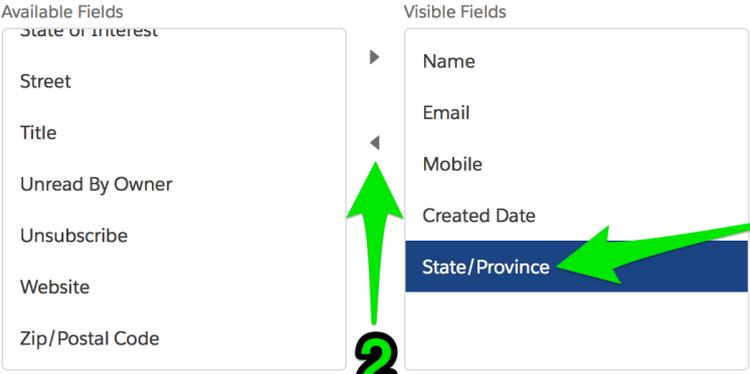


## 3. From Available Fields, select the fields you want to make visible.



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

Select Fields to Display



The screenshot shows a dialog box titled "Select Fields to Display". It is divided into two columns: "Available Fields" on the left and "Visible Fields" on the right. In the "Available Fields" column, the following fields are listed: State of Interest, Street, Title, Unread By Owner, Unsubscribe, Website, and Zip/Postal Code. In the "Visible Fields" column, the following fields are listed: Name, Email, Mobile, Created Date, and State/Province. The "State/Province" field in the "Visible Fields" column is highlighted in blue. A green arrow labeled "1" points to this highlighted field. Another green arrow labeled "2" points to the right-pointing arrow between the two columns, indicating the action of moving a field from available to visible.

Available Fields

- State of Interest
- Street
- Title
- Unread By Owner
- Unsubscribe
- Website
- Zip/Postal Code

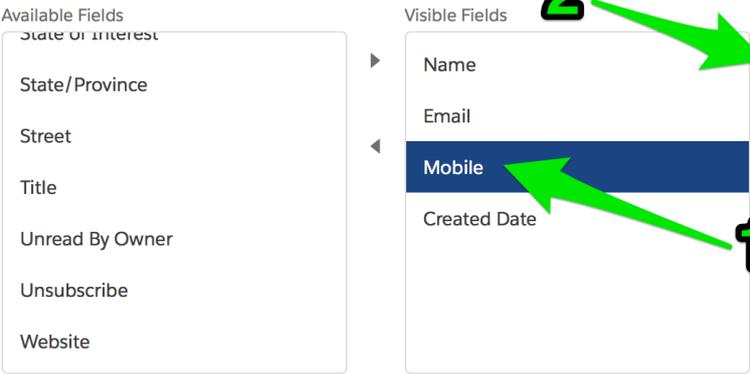
Visible Fields

- Name
- Email
- Mobile
- Created Date
- State/Province

Cancel Save

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

Select Fields to Display



The screenshot shows the same "Select Fields to Display" dialog box. In the "Available Fields" column, the following fields are listed: State of Interest, State/Province, Street, Title, Unread By Owner, Unsubscribe, and Website. In the "Visible Fields" column, the following fields are listed: Name, Email, Mobile, and Created Date. The "Mobile" field in the "Visible Fields" column is highlighted in blue. A green arrow labeled "1" points to this highlighted field. Another green arrow labeled "2" points to the right-pointing arrow between the two columns, indicating the action of moving a field from available to visible.

Available Fields

- State of Interest
- State/Province
- Street
- Title
- Unread By Owner
- Unsubscribe
- Website

Visible Fields

- Name
- Email
- Mobile
- Created Date

Cancel Save

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

### Select Fields to Display

Available Fields

- State of Interest
- State/Province
- Street
- Title
- Unread By Owner
- Unsubscribe
- Website

Visible Fields

- Name
- Mobile
- Email
- Created Date

Cancel Save

Now you can see the updated list.

Leads

My Sales Leads

50+ Items • Sorted by Name • Filtered by my leads • Updated a few seconds ago

	NAME ↑	MOBILE	EMAIL	CREATED DATE
1	<a href="#">Andreas Fotos</a>	0488798644	<a href="mailto:andreas.fotos@hotmail.com">andreas.fotos@hotmail.com</a>	20/03/2018 6:11 AM
2	<a href="#">Arthur Green</a>	0424463511		5/07/2017 3:48 PM
3	<a href="#">Bevan Ward</a>	0424463511		5/04/2017 3:48 PM
4	<a href="#">Carl Baker</a>	0424463511		5/07/2017 3:48 PM
5	<a href="#">Christopher Taylor</a>	0424463511		5/09/2017 3:48 PM
6	<a href="#">Daniel Walker</a>	0424463511		5/09/2017 3:48 PM

Accounts

Accounts for Territory

5 Items • Sorted by Account Name • Filtered by Franchise • Updated a few seconds ago

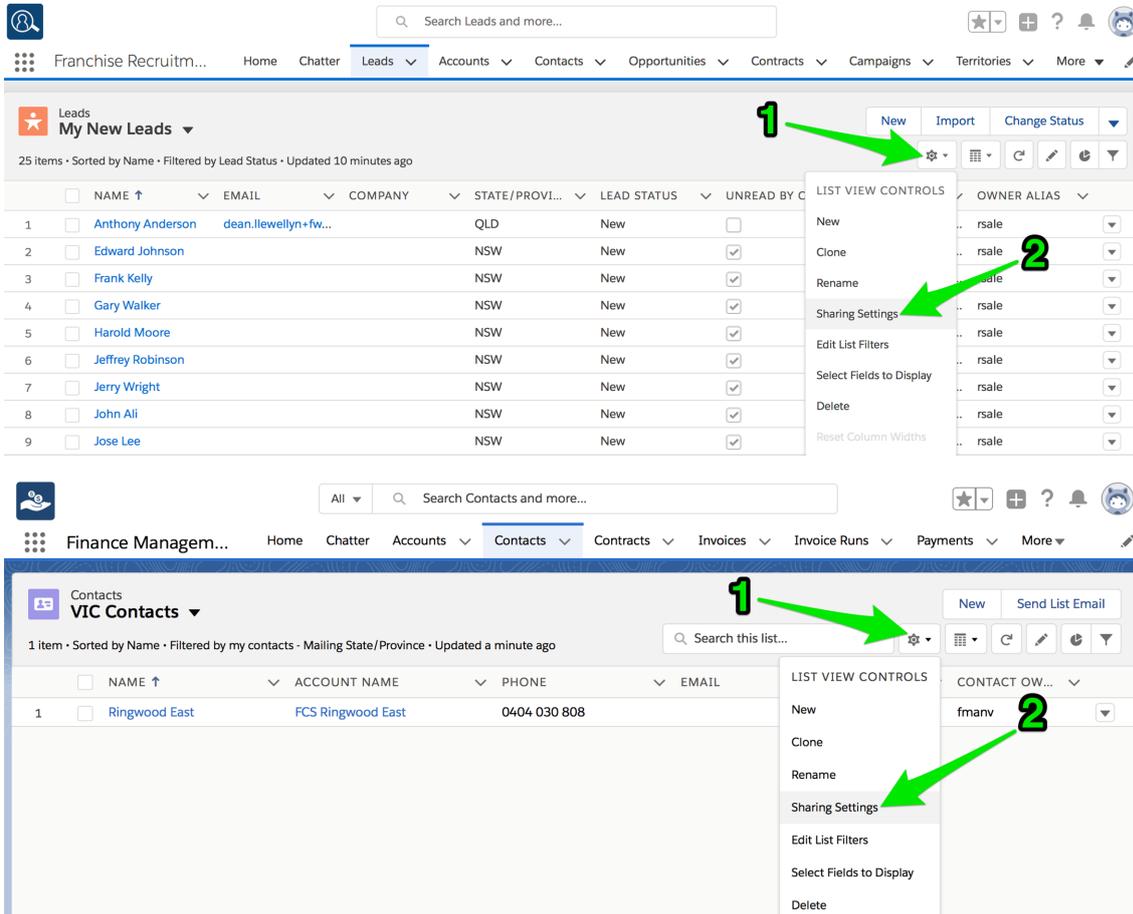
	ACCOUNT NAME ↑	ACCOUNT RECORD T...	FRANCHISE	PHONE	EMAIL	ACCOUNT OWNER AL...
1	<a href="#">Alistair Campbell</a>	Individual	<a href="#">FCS Bondi Beach</a>	0404040404	<a href="mailto:a.campbell@gmail.com.au">a.campbell@gmail.com.au</a>	swalker
2	<a href="#">Bondi Web Design</a>	Business	<a href="#">FCS Bondi Beach</a>	(02) 9300 6003	<a href="mailto:info@bondiwebdesign.com">info@bondiwebdesign.com</a>	swalker
3	<a href="#">James Brown</a>	Individual	<a href="#">FCS Bondi Beach</a>	0431899665	<a href="mailto:mike+test@franchiseclou...">mike+test@franchiseclou...</a>	swalker
4	<a href="#">Martin Newberry</a>	Individual	<a href="#">FCS Bondi Beach</a>	0435778449		swalker
5	<a href="#">Ronald Pham</a>	Individual	<a href="#">FCS Bondi Beach</a>			swalker

# 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**.

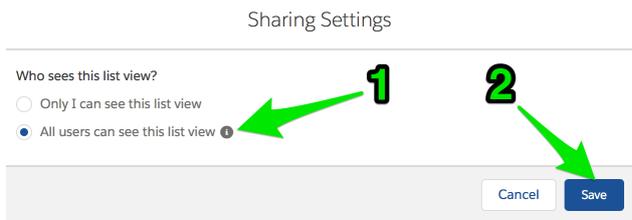
Sharing Settings

Who sees this list view?

Only I can see this list view

All users can see this list view

Cancel Save



You have now shared a list view with everyone.



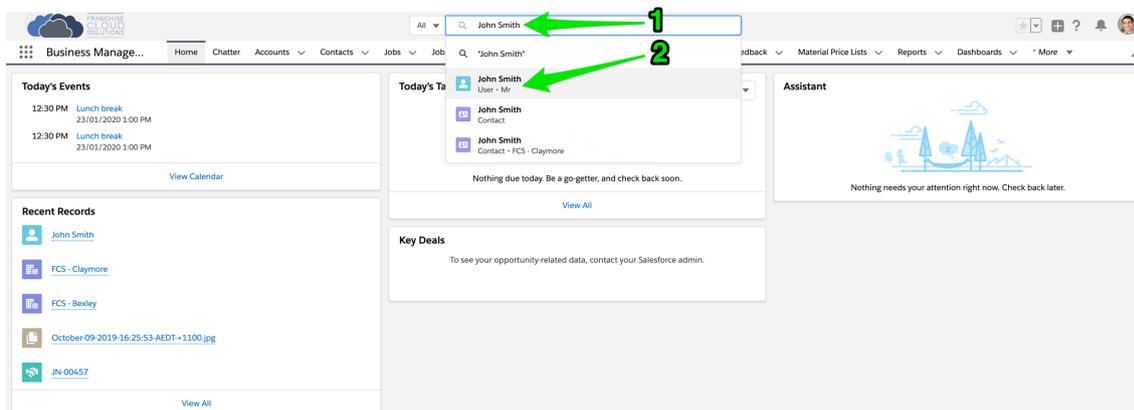
The shared list view can now be edited by anyone with the **Manage Public List Views** permission.

# 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

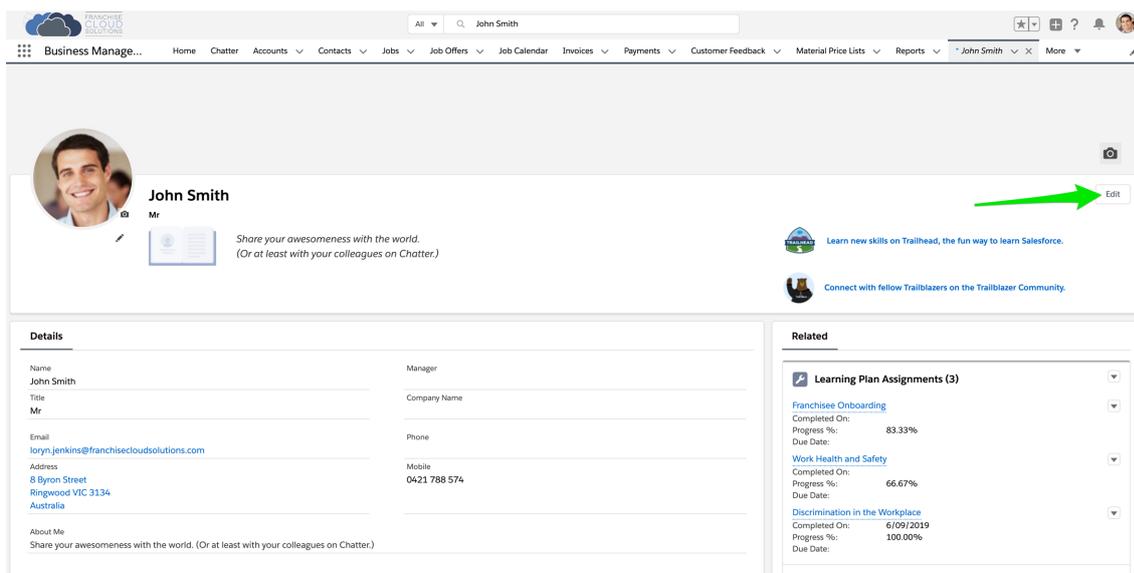
1. Using the search box, select your **User** record. See How to search for information.



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**.

Edit User

---

**\* Name** Manager

First Name

**\* Last Name**

Title  Company Name

Email  Phone

Address Mobile

Street

City  State/Province

Zip/Postal Code  Country

About Me



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

### Set a default email signature

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

The screenshot shows the Salesforce user interface. At the top right, there is a user profile icon labeled '1'. Below it, the user profile card for 'John Smith' is open, showing the 'Settings' link highlighted with a green arrow labeled '2'. The profile card also shows the user's email address, 'john.smith@fcs.com.au', and a 'Log Out' link. The main content area of the page shows 'Today's Events', 'Today's Tasks', 'Recent Records', and 'Key Deals'.

## 2. Go to My Email Settings.

The screenshot shows the Salesforce Business Manager interface. The left sidebar menu is open, and 'My Email Settings' is highlighted with a green arrow and the number '2'. Another green arrow with the number '1' points to the 'Personal Information' menu item. The main content area shows the 'Personal Information' page with the following details:

- Personal Information**
  - First Name: John
  - Last Name: Smith
  - Alias: FO
  - Email: loryn.jenkins@franchi
  - Username: franchiseowner@franchi01.demo
  - Nickname: franchiseowner
  - Phone: [Empty]
  - Extension: [Empty]
  - Fax: [Empty]
  - Mobile: 0421 788 574
- Address**
  - Street: 8 Byron Street
  - City: Ringwood
  - State/Province: VIC
  - Zip/Postal Code: 3134
  - Country: Australia
- My Work Information**
  - Company Name: [Empty]
  - Title: Mr
  - Department: [Empty]
  - Division: [Empty]
  - Employee Number: [Empty]
  - Start of Day: 6:00 AM
  - End of Day: 11:00 PM

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

The screenshot shows the Salesforce Business Manager interface with the 'My Email Settings' page. The 'Outgoing Email Settings' section is visible, with the 'Email Signature' field highlighted. The signature text is 'John Smith FCS Distributions 0400 000 000'.

**Outgoing Email Settings**

- How would you like your name to appear on your outgoing email?
  - Email Name: John Smith
- What email address would you like to use as your return address?
  - Email Address: john.smith@fcs.com.au
- Would you like to automatically BCC emails to your return address?
  - Automatic BCC:  Yes  No
- This signature will be added to your outgoing emails (1311 characters max)
  - Email Signature: John Smith  
FCS Distributions  
0400 000 000

Note: All outgoing emails will contain a "Powered by Salesforce" tag line at the bottom. This tag can be removed in the paid Editions of the product.

**Subscriptions**

- Receive Salesforce CRM Content Email Alerts
- Receive Salesforce CRM Content Alerts as Daily Digest

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

The screenshot shows the 'My Email Settings' page in Salesforce. The 'Outgoing Email Settings' section is highlighted. The 'Email Signature' field contains the code `{{Sender.Email_Signature__c}}`. A green arrow labeled '1' points to this field, and another green arrow labeled '2' points to the 'Save' button. The 'Subscriptions' section is also visible below.



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

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# Understanding Leads

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

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

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

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

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

## Lead statuses

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

- » 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:

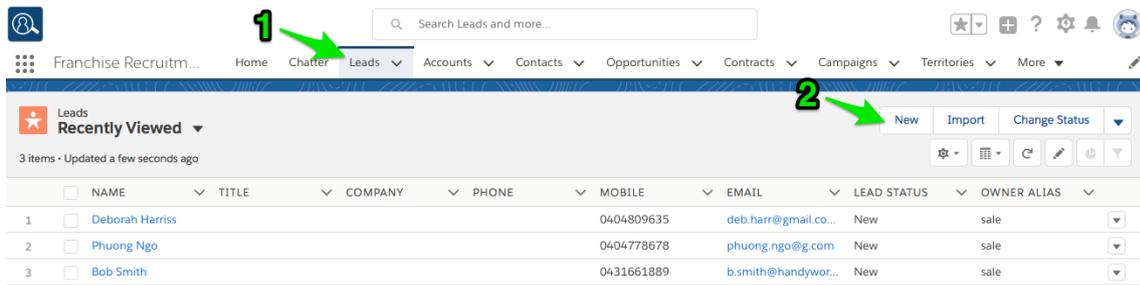
- » When an individual responds to a lead, See “How to mark a lead as belonging to a campaign” on page 243.
- » When you are sending offers to people already in your database, See “How to mark many existing leads as campaign members” on page 245.
- » When you have a list of people outside Salesforce,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

New Lead

---

Select a record type

Franchise Sales  
Franchise Sales Record Type

Employment Candidate  
Employment Candidate Record Type

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

New Lead: Franchise Sales

---

**Lead Information**

\*Name  
Salutation: Mr.  
First Name: Steve  
Last Name: Harriss

Lead Owner: Sales

Mobile: 0431 667 899  
Lead Status: New

Email: st.har@gmail.com  
Lead Source: Email

Position: Bricklayer  
Initial Contact Date: [empty]

Current Employer: Self-employed

\*Area of Interest: Buy a Franchise

Preferred Communication Channel: Email

**Address Information**

Address: [empty]

Assign using active assignment rule

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

New Lead: Franchise Sales

---

Street

City  State/Province

Zip/Postal Code  Country

**1:1 Meeting**

Preferred Date 1  Preferred Date 2

Preferred Time 1  Preferred Time 2

--None-- --None--

**Additional Information**

Country of Interest  Australia  
State of Interest  NSW

Unsubscribe   
SMS Unsubscribe

**System Information**

\*Lead Currency  Australian Dollar  
Lead Record Type **Franchise Sales**

Assign using active assignment rule

# 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

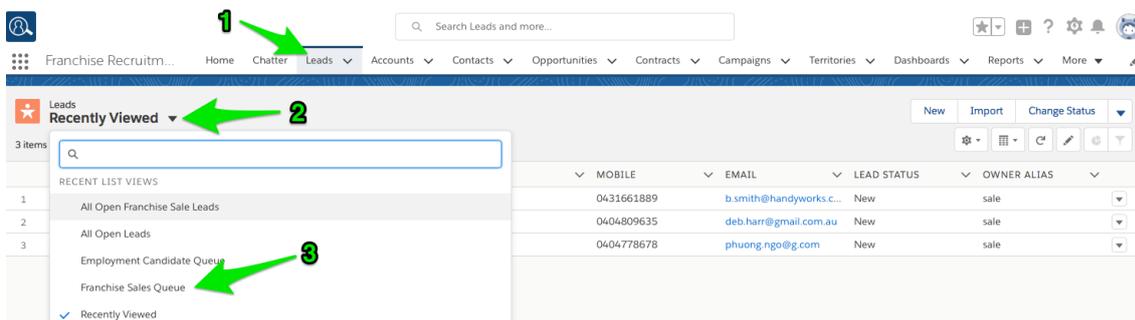
Website leads are automatically added to one of two queues. The queue is the owner of the Lead.

- » 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.

Franchise Recruitment... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads Franchise Sales Queue

2 items selected

	NAME	CITY	STATE/P...	MOBILE	EMAIL	LEAD ST...	POSITION	CURREN...	CREATE...	OWNER ...	UNREAD...
1	<input checked="" type="checkbox"/>	Bob Smith		0431661889	b.smith@ha...	New			2/03/2018 ...	Franchise S...	<input checked="" type="checkbox"/>
2	<input type="checkbox"/>	Deborah Har...		0404809635	deb.harr@g...	New			2/03/2018 ...	Franchise S...	<input checked="" type="checkbox"/>
3	<input type="checkbox"/>	James Brown	NSW	0400000000	mike@franc...	New			20/12/201...	Franchise S...	<input checked="" type="checkbox"/>
4	<input checked="" type="checkbox"/>	Phuong Ngo	VIC	0404778678	phuong.ngo...	New	Electrician		2/03/2018 ...	Franchise S...	<input checked="" type="checkbox"/>
5	<input type="checkbox"/>	Richard Ward	Waterloo NSW		dean.llewell...	New	Tradesman	Jones Servic...	5/10/2017 ...	Franchise S...	<input checked="" type="checkbox"/>
6	<input type="checkbox"/>	Robert Smith		0405307043	jack.kenny...	New			21/02/201...	Franchise S...	<input checked="" type="checkbox"/>

### 2. Press the Accept button.

Franchise Recruitment... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads Franchise Sales Queue

2 items selected

	NAME	CITY	STATE/P...	MOBILE	EMAIL	LEAD ST...	POSITION	CURREN...	CREATE...	OWNER ...	UNREAD...
1	<input checked="" type="checkbox"/>	Bob Smith		0431661889	b.smith@ha...	New			2/03/2018 ...	Franchise S...	<input checked="" type="checkbox"/>
2	<input type="checkbox"/>	Deborah Har...		0404809635	deb.harr@g...	New			2/03/2018 ...	Franchise S...	<input checked="" type="checkbox"/>
3	<input type="checkbox"/>	James Brown	NSW	0400000000	mike@franc...	New			20/12/201...	Franchise S...	<input checked="" type="checkbox"/>
4	<input checked="" type="checkbox"/>	Phuong Ngo	VIC	0404778678	phuong.ngo...	New	Electrician		2/03/2018 ...	Franchise S...	<input checked="" type="checkbox"/>
5	<input type="checkbox"/>	Richard Ward	Waterloo NSW		dean.llewell...	New	Tradesman	Jones Servic...	5/10/2017 ...	Franchise S...	<input checked="" type="checkbox"/>
6	<input type="checkbox"/>	Robert Smith		0405307043	jack.kenny...	New			21/02/201...	Franchise S...	<input checked="" type="checkbox"/>

You are now the owner of the selected leads.

## To assign leads to someone else

### 1. Open the lead detail.

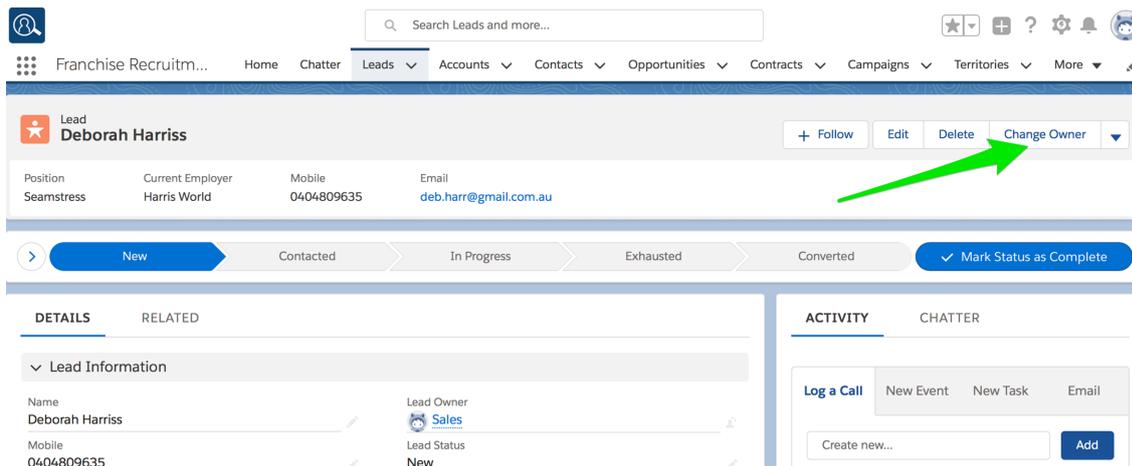
Franchise Recruitment... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Leads Recently Viewed

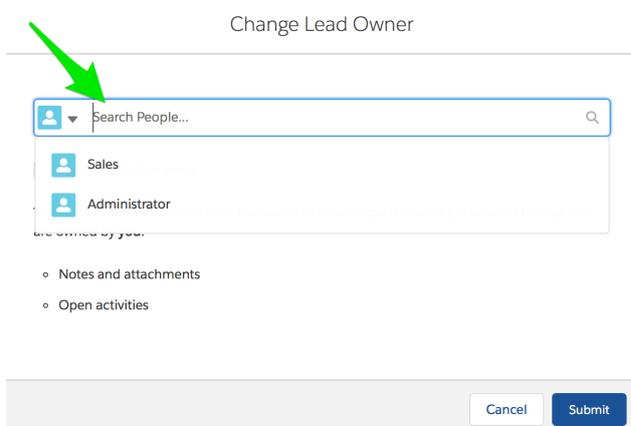
3 items • Updated 23 minutes ago

	NAME	TITLE	COMPANY	PHONE	MOBILE	EMAIL	LEAD STATUS	OWNER ALIAS
1	<input type="checkbox"/>	Bob Smith			0431661889	b.smith@handyw...	New	sale
2	<input type="checkbox"/>	Deborah Harris			0404809635	deb.harr@gmail.c...	New	sale
3	<input type="checkbox"/>	Phuong Ngo			0404778678	phuong.ngo@g.com	New	sale

## 2. Press the Change Owner button.



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



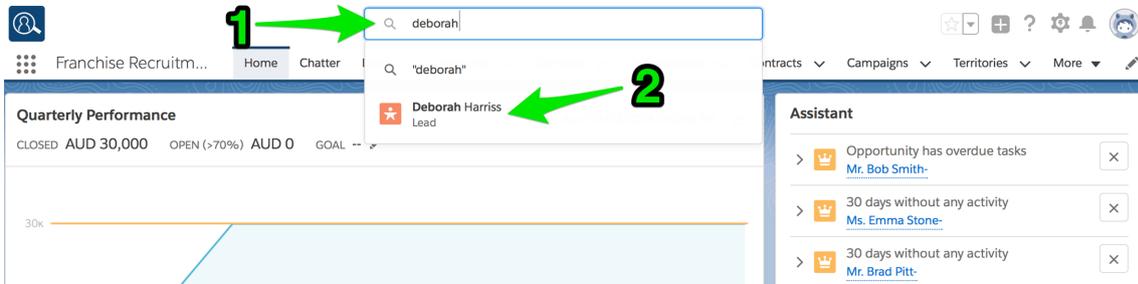
You have now assigned a lead to a person responsible for qualifying and developing the sales opportunity.

# How to contact a lead

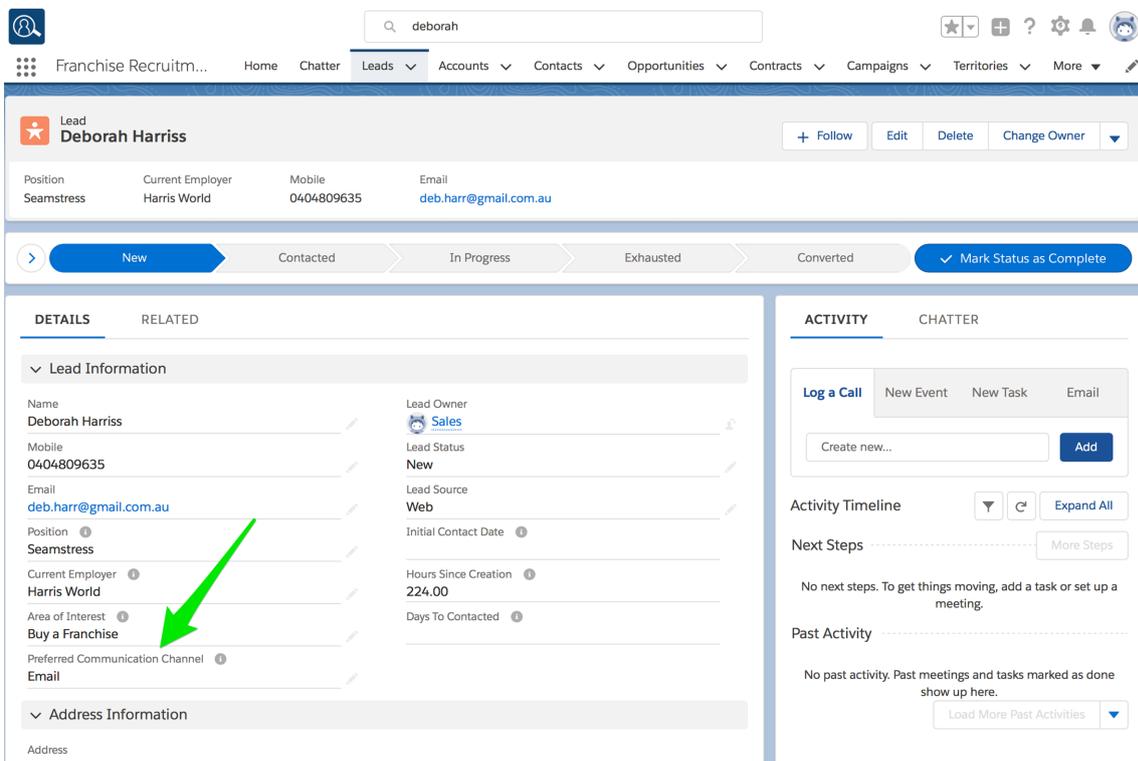
Franchise Recruitment provides the tools to track and record communications with each prospect.

## 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.

The screenshot displays the Franchise Recruitment CRM interface for a lead named Deborah Harris. The top navigation bar includes a search bar with 'deborah' entered and various utility icons. Below the navigation, the lead's profile is shown with fields for Name, Position, Current Employer, Mobile, and Email. A progress bar indicates the lead's status, currently set to 'New'. The main content area is divided into 'DETAILS' and 'RELATED' sections. The 'DETAILS' section contains fields for Name, Mobile, Email, Position, Current Employer, Area of Interest, and Preferred Communication Channel. The 'RELATED' section contains fields for Lead Owner, Lead Status, Lead Source, Initial Contact Date, Hours Since Creation, and Days To Contacted. On the right side, the 'ACTIVITY' and 'CHATTER' sections are visible. The 'ACTIVITY' section has a dropdown menu with options: 'Log a Call', 'New Event', 'New Task', and 'Email'. A green arrow points to the 'Email' option. Below the dropdown is a 'Create new...' input field and an 'Add' button. The 'Next Steps' section shows 'No next steps. To get things moving, add a task or set up a meeting.' and the 'Past Activity' section shows 'No past activity. Past meetings and tasks marked as done show up here.'

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

Log a Call New Event New Task **Email**

\*From Sales <jon.kenny@franchisecloudsolut...>

To Deborah Harriss Cc

Bcc jon.kenny@franchisecloudsolutio... X

Subject Confirm meeting time

Font Size

**B I U** A- [List Icons]

Hey Deborah

Great to speak with you over the phone. Would you like to meet in the evening next Monday?

Jon

Powered by Salesforce  
http://www.salesforce.com/

Related To Search Opportun Q

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.

<input type="checkbox"/>	NAME	TITLE	COMPANY	PHONE	MOBILE	EMAIL	LEAD STATUS	OWNER ALIAS
<input type="checkbox"/>	Bob Smith				0431661889	b.smith@handyw...	New	sale
<input type="checkbox"/>	Deborah Harriss				0404809635	deb.harr@gmail.c...	New	sale
<input type="checkbox"/>	Phuong Ngo				0404778678	phuong.ngo@g.com	New	sale

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

The screenshot shows a CRM interface for a lead named Deborah Harris. The lead is currently in the 'New' status. The 'Area of Interest' field is highlighted with a green arrow, indicating it is the target for editing.

**Lead Information**

Name	Deborah Harris	Lead Owner	Sales
Mobile	0404809635	Lead Status	New
Email	deb.harr@gmail.com.au	Lead Source	Web
Position	Seamstress	Initial Contact Date	
Current Employer	Harris World	Hours Since Creation	224.00
Area of Interest	Buy a Franchise	Days To Contacted	
Preferred Communication Channel	Email		

**Activity**

Log a Call | New Event | New Task | Email

Create new... Add

Activity Timeline

Next Steps: No next steps. To get things moving, add a task or set up a meeting.

Past Activity: No past activity. Past meetings and tasks marked as done show up here.

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

The screenshot shows a CRM interface for a lead named Deborah Harris. The 'Area of Interest' dropdown menu is highlighted in green and set to 'Employment Opportunities'. A green arrow points from the dropdown to the 'Save' button. The lead status is 'New' and the lead source is 'Email'. The lead record type is 'Employment Candidate'.

Field	Value
Name	Deborah Harris
Salutation	--None--
First Name	Deborah
Last Name	Harris
Mobile	0404809635
Email	deb.harr@gmail.com
Position	Seamstress
Current Employer	Harris World
Area of Interest	Employment Opportunities
Preferred Communication Channel	Email
Lead Status	New
Lead Source	Email
Initial Contact Date	
Hours Since Creation	244.00
Days To Contacted	

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

The screenshot shows the 'System Information' section of the lead record. The 'Lead Record Type' is highlighted in green and set to 'Employment Candidate'. The lead was created by REC Sales Manager on 5/08/2017 3:48 PM and last modified by REC Sales Manager on 5/09/2018 4:23 PM. The lead currency is Australian Dollar.

Field	Value
Created By	REC Sales Manager, 5/08/2017 3:48 PM
Last Modified By	REC Sales Manager, 5/09/2018 4:23 PM
Lead Currency	Australian Dollar
Lead Record Type	Employment Candidate

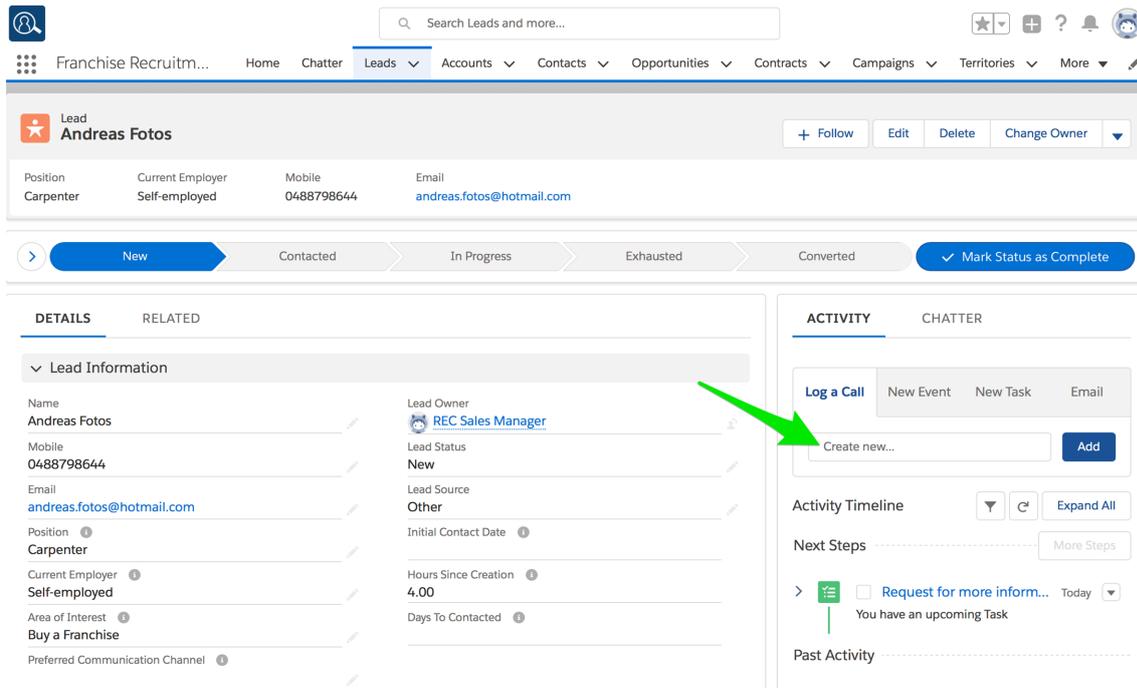
# Candidate contact tools

# 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 screenshot shows the CRM interface for lead 'Andreas Fotos'. The 'Log a Call' form is open, and the following details are entered:

- Subject:** Returned your call
- Comments:** Yes tomorrow is fine.
- Name:** Andreas Fotos

A green box highlights the 'Save' button, and a green arrow points to it. The 'Activity Timeline' section below the form shows the call has been saved.

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

The screenshot shows the CRM interface for lead 'Andreas Fotos'. The 'Activity Timeline' section is visible, and the call 'Returned your call' is highlighted with a green box. The timeline shows the call was logged on 'Today'.

## 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 screenshot shows the Salesforce interface for a lead record. The lead is named 'Andreas Fotos' and is owned by 'REC Sales Manager'. The lead status is 'New'. The activity pane on the right is open, and the 'New Task' tab is selected, indicated by a green arrow. The 'New Task' tab is highlighted in the activity pane, and the 'Add' button is visible. The 'Next Steps' section shows 'No next steps. To get things moving, add a task or set up a meeting.' The 'Past Activity' section shows 'No past activity. Past meetings and tasks marked as done show up here.'

**Lead Information**

Name	Andreas Fotos
Mobile	0488798644
Email	andreas.fotos@hotmail.com
Position	Carpenter
Current Employer	Self-employed
Area of Interest	Buy a Franchise
Preferred Communication Channel	
Lead Owner	REC Sales Manager
Lead Status	New
Lead Source	Other
Initial Contact Date	
Hours Since Creation	4,00
Days To Contacted	

**Activity**

Log a Call | **New Event** | **New Task** | Email

Create new... Add

Activity Timeline

Next Steps: No next steps. To get things moving, add a task or set up a meeting.

Past Activity: No past activity. Past meetings and tasks marked as done show up here.

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 screenshot shows a CRM interface for a lead named 'Andreas Fotos'. The lead's details are visible on the left, including contact information and employment status. On the right, a 'New Task' form is open, with several fields highlighted in green: the subject 'Request for more information about sales terms', the due date '30/03/2018', and the assigned user 'REC Sales Manager'. The status is set to 'Not Started' and the priority is 'Normal'. A green arrow points to the 'Save' button at the bottom of the task form.

Position	Current Employer	Mobile	Email
Carpenter	Self-employed	0488798644	andreas.fotos@hotmail.com

**Lead Information**

Name	Andreas Fotos	Lead Owner	REC Sales Manager
Mobile	0488798644	Lead Status	New
Email	andreas.fotos@hotmail.com	Lead Source	Other
Position	Carpenter	Initial Contact Date	
Current Employer	Self-employed	Hours Since Creation	4,00
Area of Interest	Buy a Franchise	Days To Contacted	
Preferred Communication Channel			

**Address Information**

Address

**1:1 Meeting**

Preferred Date 1		Preferred Date 2	
Preferred Time 1		Preferred Time 2	

**Task Details**

Subject: Request for more information about sales terms

Due Date: 30/03/2018

Assigned To: REC Sales Manager

Name: Andreas Fotos

Comments: Andreas says he understands the terms but is seeking clarification on some specific details.

Status: Not Started

Priority: Normal

Save

# The new task is added to Next Steps.

The screenshot displays the Salesforce Franchise Recruitment interface for a lead named **Andreas Fotos**. The lead's status is **Exhausted**. The interface is divided into two main sections: **DETAILS** and **ACTIVITY**.

**DETAILS - Lead Information:**

Name	Andreas Fotos	Lead Owner	REC Sales Manager
Mobile	0488798644	Lead Status	Exhausted
Email	andreas.fotos@hotmail.com	Lead Source	Other
Position	Carpenter	Initial Contact Date	22/06/2018
Current Employer	Self-employed	Hours Since Creation	3,940.00
Area of Interest	Buy a Franchise	Days To Contacted	94
Preferred Communication Channel			

**ACTIVITY - Next Steps:**

The **Next Steps** section shows a task titled **Request for more infor...** with a due date of **30/03**. The task is highlighted with a green box. Below the task, it says "You have an upcoming Task".

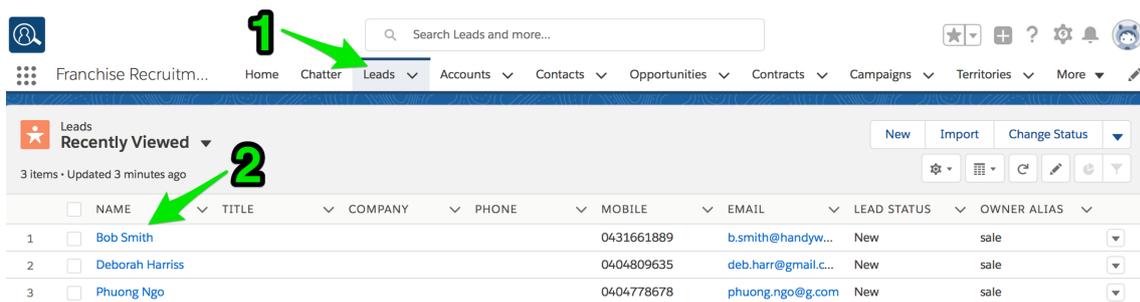
# Qualifying leads

## 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.



The screenshot shows the Franchise Recruitment system interface. At the top, there is a navigation bar with tabs for Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, Territories, and More. A green arrow labeled '1' points to the 'Leads' tab. Below the navigation bar, there is a search bar labeled 'Search Leads and more...'. Below the search bar, there is a 'Leads' section with a 'Recently Viewed' dropdown menu. A green arrow labeled '2' points to the 'Recently Viewed' dropdown menu. Below the dropdown menu, there is a table with 3 items, updated 3 minutes ago. The table has columns for NAME, TITLE, COMPANY, PHONE, MOBILE, EMAIL, LEAD STATUS, and OWNER ALIAS. The table contains three rows of lead information.

	NAME	TITLE	COMPANY	PHONE	MOBILE	EMAIL	LEAD STATUS	OWNER ALIAS
1	<input type="checkbox"/> Bob Smith				0431661889	b.smith@handyw...	New	sale
2	<input type="checkbox"/> Deborah Harris				0404809635	deb.harr@gmail.c...	New	sale
3	<input type="checkbox"/> Phuong Ngo				0404778678	phuong.ngo@g.com	New	sale

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

Lead **Mr. Bob Smith**

Position: Franchise Sales | Current Employer: | Mobile: 0431661889 | Email: b.smith@handyworks.com.au

➔ **New** ➔ Contacted ➔ In Progress ➔ Exhausted ➔ Converted ➔ Mark Status as Complete

**DETAILS** RELATED

Lead Information

Name: Mr. Bob Smith | Lead Owner: Sales | Mobile: 0431661889 | Lead Status: New

**ACTIVITY** CHATTER

Log a Call | New Event | New Task | Email

Create new... Add



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

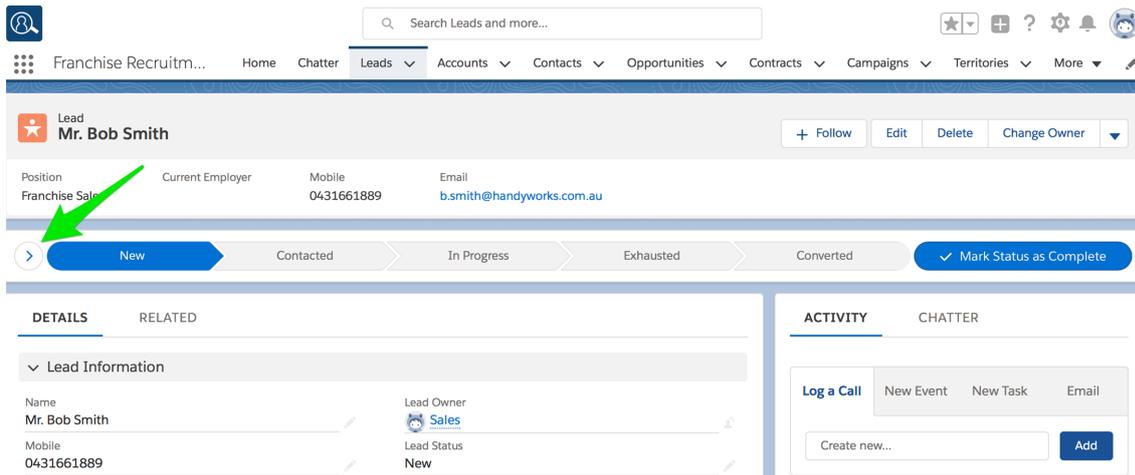
These statuses show you the current state of the lead.



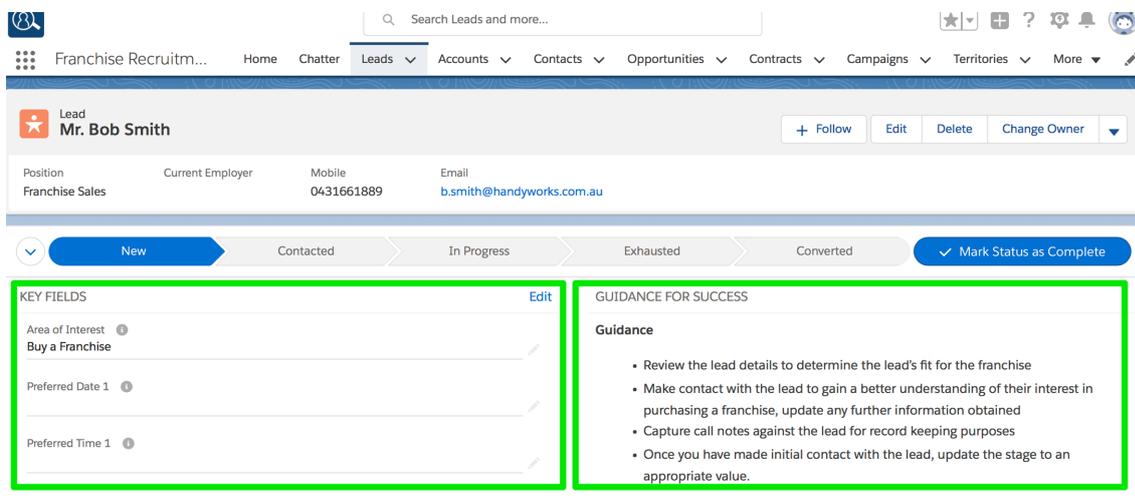
The purpose of the lead is to see who is likely to be serious about considering a purchase. A key indicator of intent is the willingness to meet in a one to one meeting.

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

3. To find out what each status means, click the **Show more** button.



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



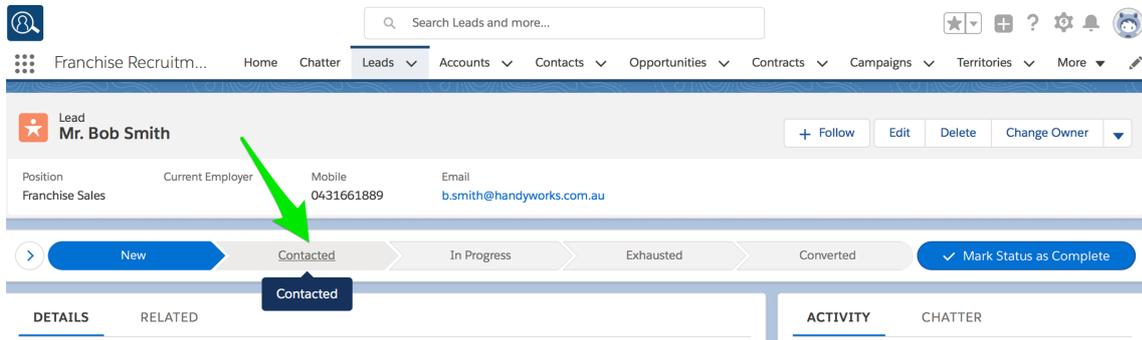
- » **Key Fields** describes which of all the fields are most important for the qualification of the lead.
- » **Guidance for Success** describes best practice for each status.

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

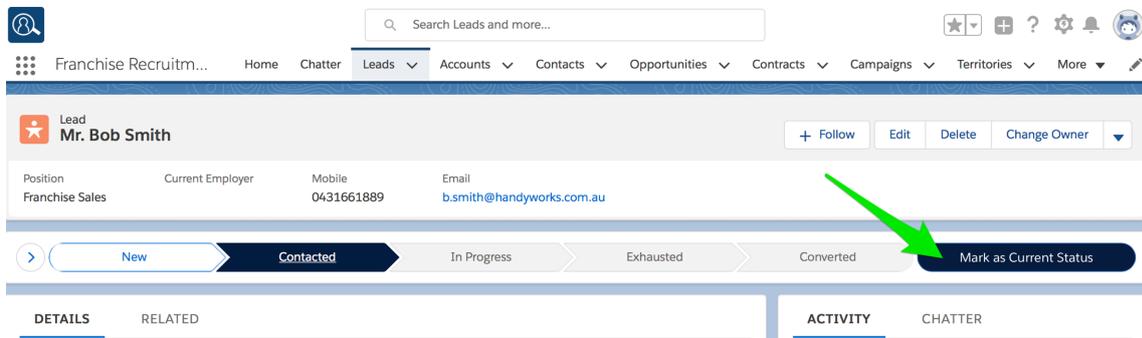
# How to move a lead to the next stage

To move a lead to a target stage

1. Click on the target status indicator.



2. Press the Mark as Current Status button.



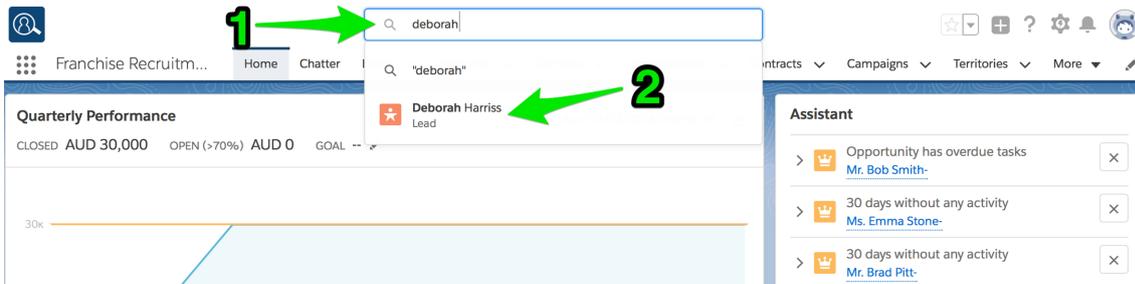
You have now changed the lead status.

# How to send emails to my leads

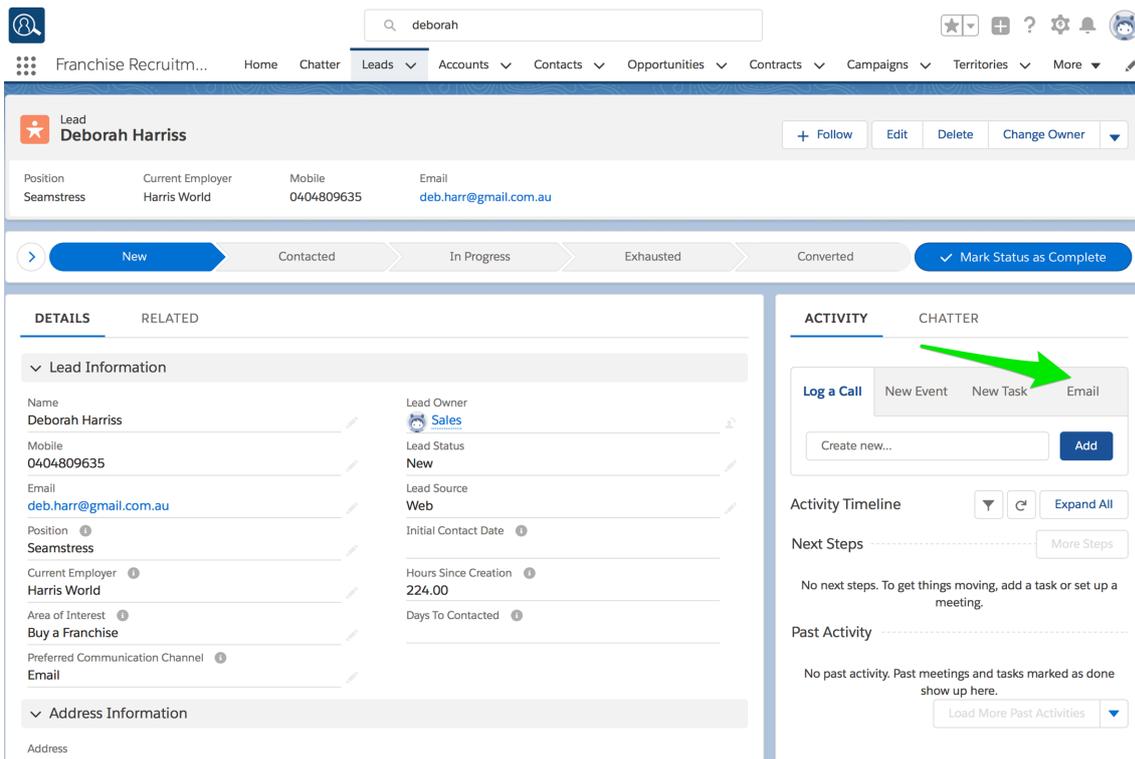
Franchise Recruitment gives you the capability of sending email to one or more leads. You can send an email to just one lead. Or you can send email to many of your leads at a time. Whenever you send emails, Franchise Recruitment stores the email in the lead activity history, so you will always know communication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



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

Log a Call New Event New Task **Email**

\* From Sales <jon.kenny@franchisecloudsolut...>

To Deborah Harris x Cc

Bcc jon.kenny@franchisecloudsolutio... x

Subject Confirm meeting time

Font Size

**B I U A** [List Icons]

Hey Deborah

Great to speak with you over the phone. Would you like to meet in the evening next Monday?

Jon

Powered by Salesforce  
http://www.salesforce.com/

Related To Search Opportun

Send

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

ACTIVITY CHATTER

Log a Call New Event New Task **Email**

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activity

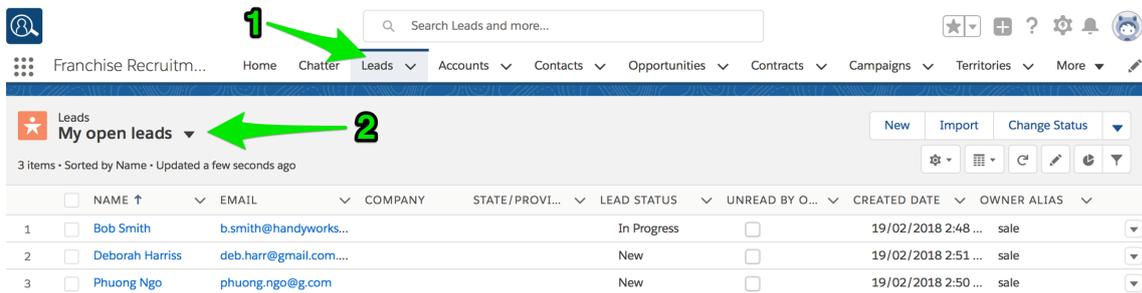
Confirm meeting ti... 12:53 PM | Today  
You sent an email to Deborah Harris

Load More Past Activities

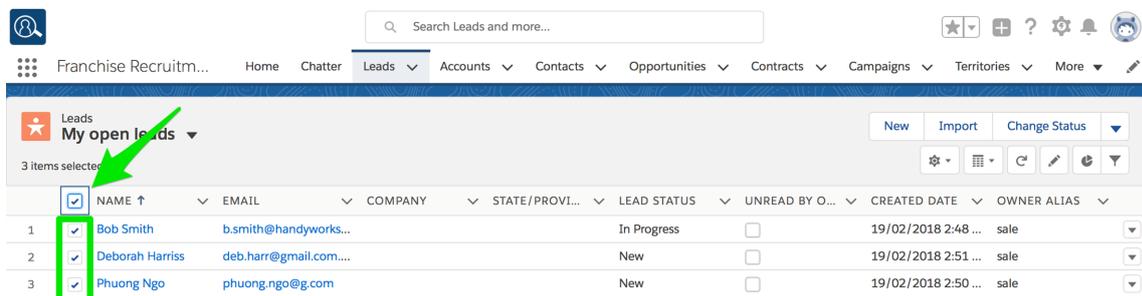
It is really simple to send a mass email to all your leads.

## To email all my leads:

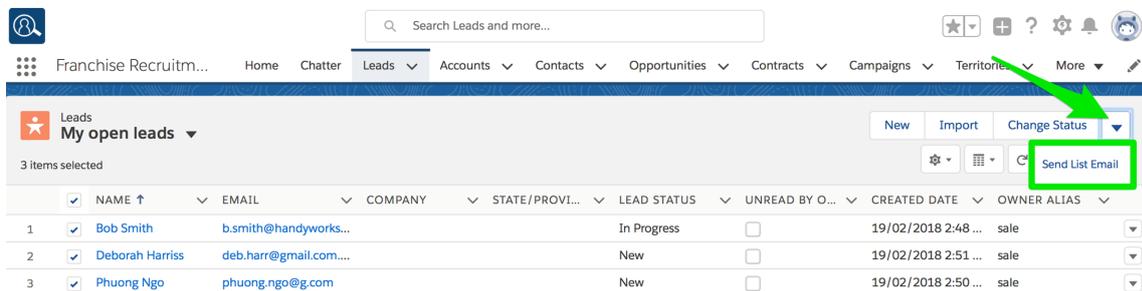
1. From the **Leads** page, select a filter to show all your open leads.



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.

Send List Email

---

Recipients  (3 Selected Recipients) My open L... x

Enter Subject...

**Content** Review

Font Size **B** *I* U **A-**       

100/100 send limits remaining **Send**

5. Now complete the normal details.

Send List Email

---

Recipients  (3 Selected Recipients) My open L... x

Come to the Big Trade Show Event with me!

**Content** Review

Font Size **B** *I* U **A-**       

I would like to invite you as my personal guest to see us in action at this year's premiere trade show.

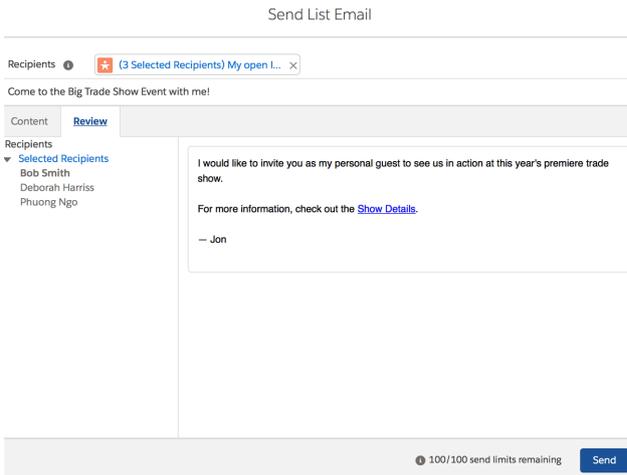
For more information, check out the [Show Details](#).

— Jon|

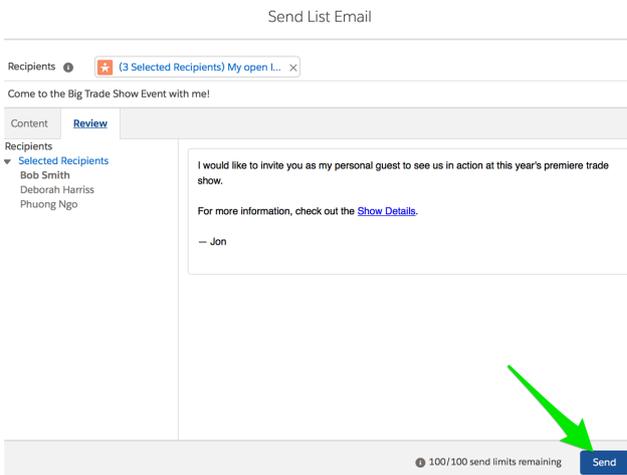
100/100 send limits remaining **Send**

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

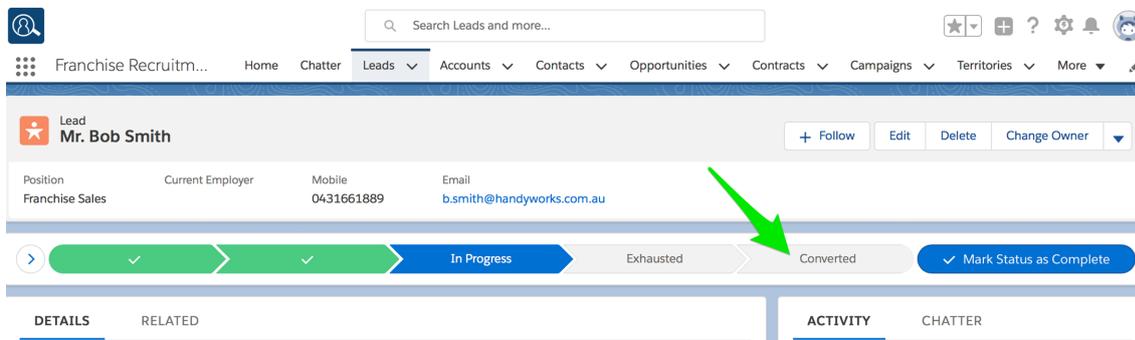
The lead process allows you to sift through all the incoming expressions of interest to identify the ones with the greatest potential for development into a sale. The best practice in Franchise Sales is to consider a lead to be qualified when you have:

- » 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

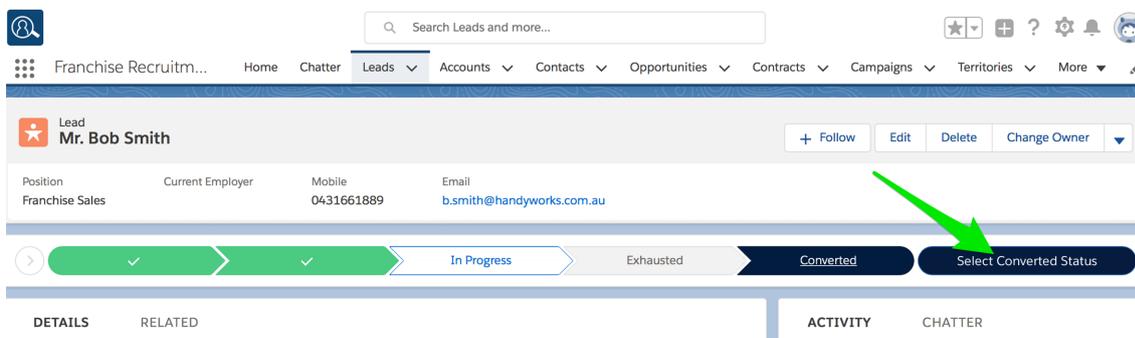
When these items have been met, then you are ready to indicate that the lead has been qualified. You do this by converting it into an opportunity. An opportunity is the next stage in the sales process. It supports the on-going activity needed in order to close the sale.

### 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**.

Convert Lead

Account

Create New    - OR -     Choose Existing

Salutation: --None--

First Name: Bob

Last Name: Smith

Record Type: Franchise Sales

Account Search: Search for matching accounts

0 Account Matches

Update Lead Source

Opportunity

Create New    - OR -     Choose Existing

Bob Smith-

To find opportunity, choose an existing account

Don't create an opportunity upon conversion

Record Owner: REC Sales Manager

Converted Status: Converted

 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

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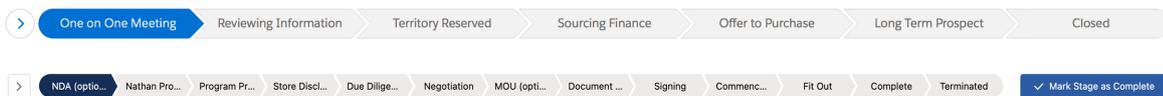
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# The Opportunity Process

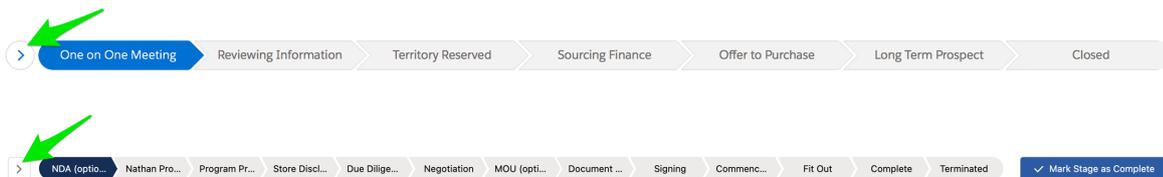
An opportunity represents a person who has been qualified as a prospective purchaser of a franchise. They have expressed interest in a purchase, appear to be a reasonable fit for your franchise, and have agreed to a one on one meeting to discuss a purchase.

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

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



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



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

One on One Meeting | Reviewing Information | Territory Reserved | Sourcing Finance | Offer to Purchase | Long Term Prospect | Closed | Mark Stage as Complete

**KEY FIELDS** [Edit](#)

Approximate Timeline

Triggers & Drivers to Investigate

Territory Notes

Financial Notes

**GUIDANCE FOR SUCCESS**

- Schedule the one on one meeting with the prospect based on their preferred date and time selections (if available)
  - Create a meeting record against the opportunity
  - Send a reminder email for the meeting to the prospect
- Conduct a one on one meeting, focusing on the leads:
  - Timeline to purchase a Franchise
  - Motivation and drivers to be involved with the Franchise
  - Territories of interest and design making criteria
  - Current financial position to make the investment in a Franchise
- Update the Account & Opportunity with your notes from the One on One Meeting.

**Guidance for Success**

- An NDA should be obtained for every candidate and opportunity but must be obtained for any Bearepaires store conversion opportunity
- The NDA should be sent to the candidate using the relevant email template. In the case of Bearepaires conversions, the template includes the discussion concerning contact with our store and other associates.

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	<ul style="list-style-type: none"> <li>» Schedule the one on one meeting with the prospect based on their preferred date and time selections (if available)</li> <li>» Conduct a one on one meeting.</li> <li>» Update the Account &amp; Opportunity with your notes from the One on One Meeting</li> </ul>
Reviewing Information	You have gathered all the 1:1 Meeting information and are reviewing it	<ul style="list-style-type: none"> <li>» Update the Territories of Interest recorded against the opportunity as the prospect makes their selection</li> <li>» Update any new information on their approximate timeline</li> <li>» Organize a Day on the Road with a Franchisee to help the prospect in their decision making process</li> </ul>
Territory Reserved	Candidate has settled on a specific territory	<ul style="list-style-type: none"> <li>» Update the Territories of Interest recorded against the opportunity when the prospect makes their final decision</li> <li>» Update the Opportunity Product with the correct Product and Territory being purchased. This will reserve the Territory for this Opportunity.</li> </ul>
Sourcing Financing	Candidate is seeking financing to complete the transaction	<ul style="list-style-type: none"> <li>» Review the prospect's financial position based on their assets and liabilities</li> <li>» Make the necessary introduction referrals for banking and vehicle finance as required</li> </ul>
Offer to Purchase	Contract and disclosure documents have been provided to the candidate	<ul style="list-style-type: none"> <li>» Capture all the details required for the contract</li> <li>» Create the draft contract record for the opportunity, include all fees, performance criteria and guarantors as required</li> <li>» Generate all relevant disclosure and legal documents and send drafts to the customer</li> </ul>
Long Term Prospect	Transaction will not proceed at this time	<ul style="list-style-type: none"> <li>» 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.</li> </ul>

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)	<ul style="list-style-type: none"> <li>» An NDA should be obtained for every candidate and opportunity but must be obtained for any Beaurepaires store conversion opportunity</li> <li>» 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.</li> </ul>
Nathan Profiler	<ul style="list-style-type: none"> <li>» Request the Franchising &amp; Licencing Director, Business Manager or their delegates to initiate the Nathan Profiler process with the candidate</li> <li>» 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</li> <li>» Evaluate the reports carefully and, as necessary, raise any concerns with the the Franchising &amp; Licencing Director or Business Manager</li> </ul>
Program Presentation	<ul style="list-style-type: none"> <li>» 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</li> <li>» Make notes of this meeting in Franchise Cloud Solutions, including your observations and evaluation of the questions asked by the candidate</li> <li>» If you are unsure of any question the candidate poses, promise a response and seek advice.</li> <li>» If you elect to continue with the opportunity, send a GDT/TT credit application form to the candidate for completion</li> </ul>

Stage	Keys to Success
Store Disclosure (Optional)	<ul style="list-style-type: none"> <li>» This stage only applies to Beaurepaires conversion opportunities</li> <li>» Request a standard store disclosure document for the stores/-territories you are discussing with the candidate</li> <li>» Provide the document to the candidate and save a copy in Franchise Cloud Solutions</li> </ul>
Due Diligence	<ul style="list-style-type: none"> <li>» This stage is complete when the candidate provides a business plan or otherwise indicates they do not wish to proceed</li> <li>» The business plan should be reviewed and any areas of concern noted for clarification or correction and a copy saved in Franchise Cloud Solutions</li> </ul>
Negotiation	<ul style="list-style-type: none"> <li>» The stage is complete when there is a "meeting of the minds" with respect to the deal, any special conditions, etc.</li> <li>» Any deviation from the store disclosure document or any special conditions must be discussed and agreed with the Franchising &amp; Licencing Director or Business Manager before proceeding</li> <li>» 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.</li> </ul>
MOU (optional)	<ul style="list-style-type: none"> <li>» A Memorandum of Understanding applies to Beaurepaires conversion opportunities and, on extremely rare occasions to other types of opportunities</li> <li>» Ensure the proposed premises address is filled out on the related territory</li> <li>» Ensure a legal entity is created and includes a registered address</li> <li>» Send the candidate the standard MOU via Docusign and ensure a signed copy is saved in Franchise Cloud Solutions</li> </ul>
Document Prep	<ul style="list-style-type: none"> <li>» Advise the Franchising &amp; Licencing Director or Business Manager you require agreements and/or disclosure document to be prepared by assigning them a task.</li> <li>» Ensure the relevant fields in the MOU / Contract Information section are completed and that the related territory has a premises address.</li> </ul>

Stage	Keys to Success
Signing	<ul style="list-style-type: none"> <li>» Once the relevant documents have been prepared, the Franchising &amp; Licencing Director or Business Manager will send them to the candidate via DocuSign.</li> <li>» Opportunities at this stage indicate the documents have been sent to the candidate for signing, but are not yet signed.</li> <li>» Once the candidate has signed all the necessary documents via DocuSign, the stage will automatically update to Commencement.</li> </ul>
Commencement	<ul style="list-style-type: none"> <li>» This stage is complete once the candidate has commenced trading</li> </ul>
Fit Out	<ul style="list-style-type: none"> <li>» This stage is complete once the store has been refurbished in accordance with the agreed montage</li> </ul>
Complete	<ul style="list-style-type: none"> <li>» Opportunities may be marked as complete once all documentation has been finalised, records, the store has commence trading and refurb is completed</li> </ul>
Terminated	<ul style="list-style-type: none"> <li>» 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</li> <li>» An opportunity can, therefore, be terminated at any stage</li> </ul>

# 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.

The screenshot shows the 'DETAILS' tab of an opportunity page. The '1:1 Meeting' section is highlighted with a green box. It contains the following information:

Field	Value
Opportunity Owner	Sales
Opportunity Name	Ms. Megan Ames-
Account Name	Megan Ames
Description	
Close Date	31/03/2018
Stage	One on One Meeting
Probability (%)	30%
Amount	
Primary Campaign Source	
Preferred Date 1	13/03/2018
Preferred Time 1	Evening
Preferred Date 2	
Preferred Time 2	
Demonstration Day	
Demonstration Date	
Demonstration Day Franchise	
Demonstration Day Contact	

## To schedule a one on one meeting meeting

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

The screenshot shows the Salesforce interface for an Opportunity named 'Megan Ames'. The 'DETAILS' tab is active, and a pop-up window displays contact information for Megan Ames, including her position (Self-employed), mobile number (0448997335), and email (megan.ames@ames.com). A green box highlights this contact information, and a green arrow points to the 'Megan Ames' link in the 'Account Name' field. The opportunity stage is 'One on One Meeting' and the close date is 31/03/2018.

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

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

The screenshot shows the Salesforce 'More' menu. A green arrow points to the 'More' dropdown menu, and another green arrow points to the 'Calendar' option. A lightbulb icon is present in the top left corner of the slide.

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

The screenshot shows the Salesforce interface for an Opportunity record titled "Megan Ames". The top navigation bar includes "Home", "Chatter", "Leads", "Accounts", "Contacts", "Opportunities", "Contracts", "Campaigns", "Territories", and "More". The Opportunity record details include: Account Name: Megan Ames, Close Date: 31/03/2018, Opportunity Owner: REC Sales Manager. The stage is "1:1 Meeting". The "ACTIVITY" tab is active, showing a "Log a Call" activity form. A green arrow labeled "1" points to the "Log a Call" button.

DETAILS	RELATED
Opportunity Owner REC Sales Manager	Close Date 31/03/2018
Opportunity Name Megan Ames-	Stage One on One Meeting
Account Name Megan Ames	Probability (%) 30%
Contract 00000208	Amount
Description	Primary Campaign Source Google Search

**1:1 Meeting**

Preferred Date 1	Preferred Date 2

Preferred Time 1	Preferred Time 2

**ACTIVITY** | **CHATTER**

Log a Call | New 1:1 ... | New Task | Email

Subject  
Call

Comments

Name  
Search Contacts...

Related To  
Megan Ames-

Save

### 4. Record the meeting details.

The screenshot shows the "Log a Call" activity form for a "New 1:1 Meeting". The form includes fields for Start Date (7/03/2018) and Time (4:00 PM), End Date (7/03/2018) and Time (5:00 PM), Related To (Megan Ames-), Location (Sydney Head Office), Description (Keen to meet soon to discuss the opportunity. Probably interested in a bronze product.), and Assigned To (REC Sales Manager). A "Save" button is at the bottom.

**ACTIVITY** | **CHATTER**

Log a Call | **New 1:1 ...** | New Task | Email

\* Start  
Date: 7/03/2018 | Time: 4:00 PM

\* End  
Date: 7/03/2018 | Time: 5:00 PM

Related To  
Megan Ames-

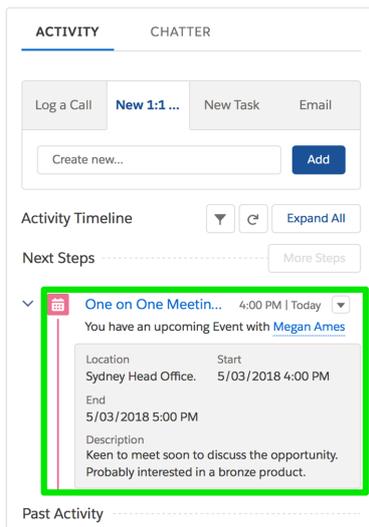
Location  
Sydney Head Office.

Description  
Keen to meet soon to discuss the opportunity.  
Probably interested in a bronze product.

\* Assigned To  
REC Sales Manager

Save

## 5. Press Save.



The screenshot shows the 'ACTIVITY' tab with buttons for 'Log a Call', 'New 1:1 ...', 'New Task', and 'Email'. Below these is a 'Create new...' field and an 'Add' button. The 'Activity Timeline' section shows a meeting event titled 'One on One Meetin...' with details: Location: Sydney Head Office, Start: 5/03/2018 4:00 PM, End: 5/03/2018 5:00 PM, and Description: Keen to meet soon to discuss the opportunity. Probably interested in a bronze product. The event is highlighted with a green border.

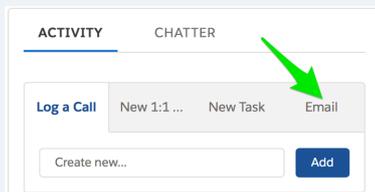
The One on One Meeting is now recorded in the Activity Timeline. It is also entered into your Calendar.



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.

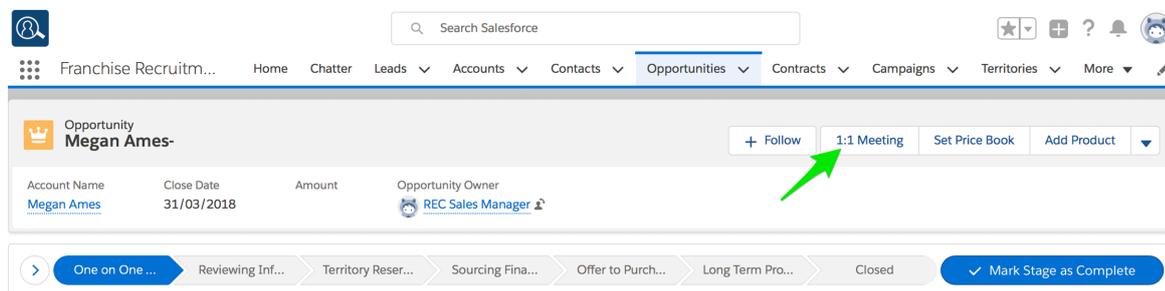


The screenshot shows the 'ACTIVITY' tab with buttons for 'Log a Call', 'New 1:1 ...', 'New Task', and 'Email'. Below these is a 'Create new...' field and an 'Add' button. A green arrow points to the 'Email' button.

## 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.

Timeline Information

Approximate Timeline	Demonstration Day Franchise
1 Month	FCS Randwick
Demonstration Day	Demonstration Day Contact
Yes	Paul Young
Demonstration Date	Triggers & Drivers to Investigate
22/03/2018	Please enter triggers & drivers to investigate...
	Close Date
	30/04/2018

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**.

Territory Search

Fields	Operator	Field Or Value	Value
Territory Name	Contains	Value	Newtown

+ Search

The list of territories matching your search criteria now appear.

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

Territory Search

Fields: Territory Name Operator: Contains Field Or Value: Value Value: Newtown

+ Search

<input type="checkbox"/>	TERRITORY NAME	TERRITORY NUMBER	COUNTRY	STATE	TYPE	STATUS	SUB STATUS
<input checked="" type="checkbox"/>	Territory - Newtown	TER-422	Australia		Metro	Unowned	

Add Selected

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

Territory Search

Fields: Territory Name Operator: Contains Field Or Value: Value Value: Newtown

+ Search

<input type="checkbox"/>	TERRITORY NAME	TERRITORY NUMBER	COUNTRY	STATE	TYPE	STATUS	SUB STATUS	REMOVE
<input checked="" type="checkbox"/>	Territory - Newtown	TER-422	Australia		Metro	Unowned		<a href="#">Remove</a>

Add Selected

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**.

Territory Search

Fields **1** State Operator Equals Field Or Value Value **2** NSW 

+ **3** Search

<input type="checkbox"/>	TERRITORY NAME	TERRITORY NUMBER	COUNTRY	STATE	TYPE	STATUS	SUB STATUS
<input type="checkbox"/>	Territory - Newtown	TER-422	Australia		Metro	Unowned	
<input type="checkbox"/>	Territory - Erskineville	TER-423	Australia		Metro	Unowned	
<input type="checkbox"/>	Territory - Mascot	TER-426	Australia		Metro	Unowned	

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

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

### To find a range of territories using multiple criteria:

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

Territory Search

Fields State Operator Equals Field Or Value Value NSW 

+ Search

A new row appears.

## 2. Specify your additional criteria and press **Search**.



In this case, we are seeing franchises available for purchase in the State of NSW that are not reserved by any other potential purchaser.

Territory Search

Fields: State (1) Operator: Equals Value: NSW (2)

AND Fields: Status (3) Operator: Equals Value: Unowned (5)

AND Fields: Sub Status (3) Operator: Does Not Equal (4) Value: Reserved (5)

+ Search (6)

<input type="checkbox"/>	TERRITORY NAME	TERRITORY NUMBER	COUNTRY	STATE	TYPE	STATUS	SUB STATUS
<input type="checkbox"/>	Territory - Newtown	TER-422	Australia		Metro	Unowned	
<input type="checkbox"/>	Territory - Erskineville	TER-423	Australia		Metro	Unowned	
<input type="checkbox"/>	Territory - Mascot	TER-426	Australia		Metro	Unowned	

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

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

### How to record compliance information

You can optionally record Compliance Information at this stage.

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

#### Compliance Information

##### Operating Structure

Please enter operating structure...

##### Legal Entity Name

Please enter legal entity name...

##### Business Number

Please enter business number...

##### Trading Name

Please enter trading name...

##### Company Number

Please enter company number...

### Remember to save

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

The collected information is now stored within the related Account, Opportunity and Contract records.

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



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

## Now advance the stage

You have now completed the One on One Meeting stage.

» Press **Mark Stage as Complete**.

The screenshot shows the CRM interface for an opportunity named 'Megan Ames'. The stage navigation bar at the top indicates the current stage is 'One on One Meeting'. A green arrow points to the 'Mark Stage as Complete' button, which is highlighted in blue. Below the navigation bar, the 'DETAILS' section shows the opportunity owner as 'REC Sales Manager', the close date as '31/03/2018', and the stage as 'One on One Meeting'. The 'ACTIVITY' section shows a 'Log a Call' button and a 'Create new...' field.

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

The screenshot shows the CRM interface for the same opportunity 'Megan Ames'. The stage navigation bar now indicates the current stage is 'Reviewing Information', which is highlighted in green. The 'Mark Stage as Complete' button is now highlighted in blue. Below the navigation bar, the 'DETAILS' section shows the opportunity owner as 'REC Sales Manager', the close date as '31/03/2018', and the stage as 'Reviewing Information'. The 'ACTIVITY' section shows a 'Log a Call' button and a 'Create new...' field.

# 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 screenshot shows the 'Opportunity' page for 'Phuong Ngo'. At the top, there are buttons for '+ Follow', '1:1 Meeting', 'Set Price Book', and 'Add Product'. Below this, the account details are listed: Account Name (Phuong Ngo), Close Date (31/03/2018), Amount, and Opportunity Owner (REC Sales Manager). A progress bar shows stages: One on One Meeting, Reviewing Inf..., Territory Reser..., Sourcing Fina..., Offer to Purch..., Long Term Pro..., and Closed. A 'Mark Stage as Complete' button is visible. The 'DETAILS' tab is active, showing fields for Opportunity Owner, Close Date, Opportunity Name, Stage, Account Name (highlighted with a green arrow), Probability (%), Contract, Amount, and Description. The 'ACTIVITY' tab is also visible, showing options for 'Log a Call', 'New 1:1 ...', 'New Task', and 'Email'.

The Account page appears.

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

The Change Account Owner dialog box appears.

The 'Change Account Owner' dialog box is shown. It has a search bar labeled 'Search People...'. Below the search bar are two checkboxes: 'Transfer open opportunities not owned by you' and 'Send notification email'. A paragraph states: 'The new owner will also become the owner of these records related to Phuong Ngo that are owned by the current record owner.' Below this is a list of records that will be transferred: Open opportunities, Contracts in Draft and In Approval status, Standalone and transferred contracts' draft orders, Contacts, Notes and attachments, and Open activities. At the bottom, there are 'Cancel' and 'Submit' buttons.

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

Change Account Owner

---

 OPS Head Office Manager ×

Transfer open opportunities not owned by you  
 Send notification email

**OPS Head Office Manager** will also become the owner of these records related to **Phuong Ngo** that are owned by **the current record owner**.

- Open opportunities
- Contracts in Draft and In Approval status
- Standalone and transferred contracts' draft orders
- Contacts
- Notes and attachments
- Open activities



# Reviewing information stage

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

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

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

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

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



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



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

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

## To follow up after the one on one meeting

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

DETAILS	RELATED
Opportunity Owner <a href="#">REC Sales Manager</a>	Close Date 31/03/2018
Opportunity Name Megan Ames-	Stage Reviewing Information
Account Name <a href="#">Megan Ames</a>	Probability (%) 45%
Contract <a href="#">0000208</a>	Amount
Description	Primary Campaign Source <a href="#">Google Search</a>
<b>1:1 Meeting</b>	
Preferred Date 1 13/03/2018	Preferred Date 2
Preferred Time 1 Evening	Preferred Time 2
<b>Demonstration Day Information</b>	
Demonstration Day No	Demonstration Day Franchise
Demonstration Date	Demonstration Day Contact
<b>1:1 Meeting Follow Up Emails</b>	
Send One on One Meeting Emails <input type="checkbox"/>	One on One Meeting Follow Up Send Date
Send Banker Referral <input type="checkbox"/>	Banker Referral Email Send Date
Send Vehicle Finance Referral <input type="checkbox"/>	Vehicle Finance Referral Email Send Date
Send Demonstration Day Referral Email <input type="checkbox"/>	Demonstration Day Email Send Date



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



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

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

<b>1:1 Meeting Follow Up Emails</b>	
Send One on One Meeting Emails <input type="checkbox"/>	One on One Meeting Follow Up Send Date
Send Banker Referral <input type="checkbox"/>	Banker Referral Email Send Date
Send Vehicle Finance Referral <input type="checkbox"/>	Vehicle Finance Referral Email Send Date
Send Demonstration Day Referral Email <input type="checkbox"/>	Demonstration Day Email Send Date

### 3. Select each email as needed.

1:1 Meeting Follow Up Emails

<input checked="" type="checkbox"/> Send One on One Meeting Emails ⓘ	↶	One on One Meeting Follow Up Send Date ⓘ
<input checked="" type="checkbox"/> Send Banker Referral ⓘ	↶	Banker Referral Email Send Date ⓘ
<input type="checkbox"/> Send Vehicle Finance Referral ⓘ		Vehicle Finance Referral Email Send Date ⓘ
<input checked="" type="checkbox"/> Send Demonstration Day Referral Email ⓘ	↶	Demonstration Day Email Send Date ⓘ

### 4. Press **Save**.

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

1:1 Meeting Follow Up Emails

<input checked="" type="checkbox"/> Send One on One Meeting Emails ⓘ	↶	One on One Meeting Follow Up Send Date ⓘ
<input checked="" type="checkbox"/> Send Banker Referral ⓘ	↶	Banker Referral Email Send Date ⓘ
<input type="checkbox"/> Send Vehicle Finance Referral ⓘ	↶	Vehicle Finance Referral Email Send Date ⓘ
<input checked="" type="checkbox"/> Send Demonstration Day Referral Email ⓘ	↶	Demonstration Day Email Send Date ⓘ

6/03/2018  
6/03/2018  
6/03/2018  
6/03/2018



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

# How to update territories of interest

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

## To exclude Territories of Interest

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

The screenshot shows the Salesforce interface for an Opportunity record titled "Megan Ames". The "Opportunities" tab is selected in the top navigation. The record details include Account Name (Megan Ames), Close Date (31/03/2018), and Opportunity Owner (REC Sales Manager). The process flow shows the current stage as "Reviewing Information". The "RELATED" tab is selected, and a green arrow points to it. The "RELATED" section shows fields for Opportunity Owner, Opportunity Name, Account Name, Contract, and Description. The "ACTIVITY" section shows options to "Log a Call", "New 1:1 Meeting", "New Task", and "Email".

You see the list of current Territories of Interest.

The screenshot shows the same Salesforce Opportunity record for "Megan Ames". The "RELATED" tab is selected, and a list of "Territories of Interest (2)" is displayed. The list is highlighted with a green border. The list has columns for Territory ID, Territory Name, Product Classification, and Status.

TERRITORY OF INTERE...	TERRITORY NAME	PRODUCT CLASSIFICATION	STATUS
TOI-0000043	Territory - Newtown	Bronze	Under Review
TOI-0000044	Territory - Blacktown	Bronze	Under Review

Below the table is a "View All" link. The "ACTIVITY" section shows options to "Log a Call", "New 1:1 Meeting", "New Task", and "Email".

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

The screenshot shows a table titled "Territories of Interest (2)". The table has four columns: "TERRITORY OF INTERE...", "TERRITORY NAME", "PRODUCT CLASSIFICATION", and "STATUS". There are two rows of data. A green arrow labeled "1" points to the dropdown arrow in the "STATUS" column of the first row. A second green arrow labeled "2" points to the "Edit" button in the dropdown menu that appears for the first row.

TERRITORY OF INTERE...	TERRITORY NAME	PRODUCT CLASSIFICATION	STATUS
<a href="#">TOI-0000043</a>	<a href="#">Territory - Newtown</a>	Bronze	Under Review
<a href="#">TOI-0000044</a>	<a href="#">Territory - Blacktown</a>	Bronze	Under Review

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

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

The screenshot shows the "Edit Territory of Interest" dialog box. The "Status" dropdown menu is open, and "Excluded" is selected. A green arrow labeled "1" points to the dropdown arrow, and another green arrow labeled "2" points to the "Excluded" option. Other fields include "Territory: Territory - Blacktown", "Opportunity: Megan Ames", and "Last Modified By: REC Sales Manager, 6/03/2018 11:29 AM".

4. Press **Save**.

The screenshot shows the Salesforce interface for an Opportunity record titled "Megan Ames". The "Reviewing Inf..." stage is active. In the "RELATED" section, there is a table of "Territories of Interest (2)". The "STATUS" column for the second row, "Territory - Blacktown", is highlighted with a green box and contains the text "Excluded".

TERRITORY OF INTERE...	TERRITORY NAME	PRODUCT CLASSIFICATION	STATUS
<a href="#">TOI-0000043</a>	<a href="#">Territory - Newtown</a>	Bronze	Under Review
<a href="#">TOI-0000044</a>	<a href="#">Territory - Blacktown</a>	Bronze	Excluded

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



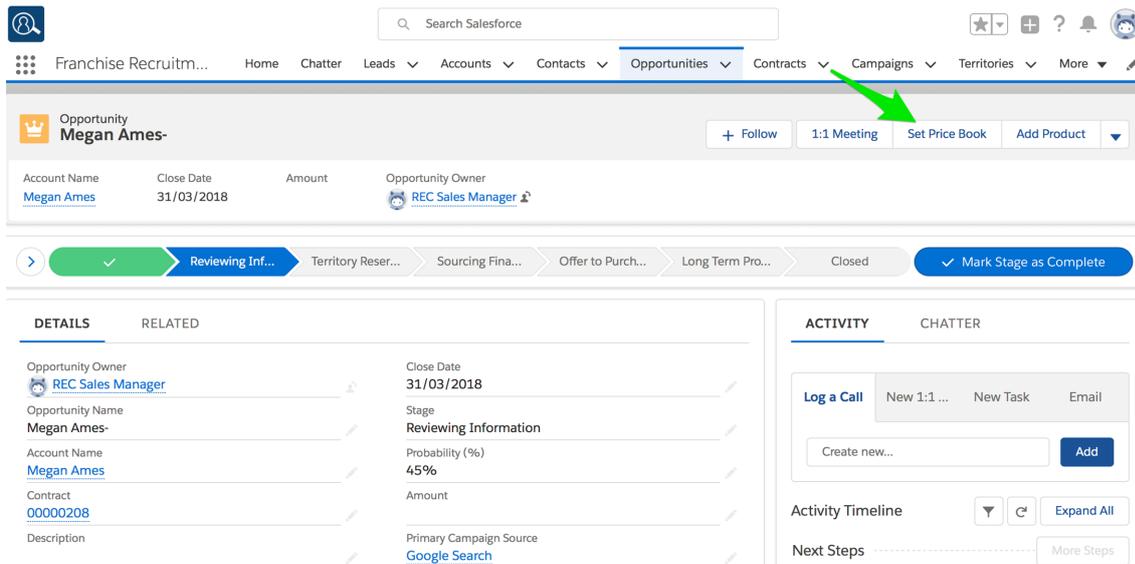
Products are defined through a combination of a Product class, Territory and Price. Product classes are a way to segment the value of territories, allowing you to set higher prices for more productive territories. Territories are classified by product class. Once you add a product to an opportunity you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

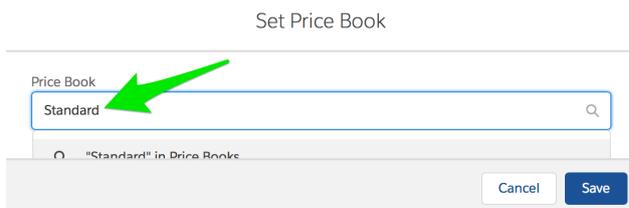
1. From the Opportunity, choose **Set Price Book**.



The screenshot shows the Salesforce interface for an Opportunity named 'Megan Ames'. The top navigation bar includes 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Contracts', 'Campaigns', 'Territories', and 'More'. The 'Opportunities' menu is active. In the opportunity header, there are buttons for '+ Follow', '1:1 Meeting', 'Set Price Book', and 'Add Product'. A green arrow points to the 'Set Price Book' button. Below the header, there is a progress bar with stages: 'Reviewing Inf...', 'Territory Reser...', 'Sourcing Fina...', 'Offer to Purch...', 'Long Term Pro...', and 'Closed'. The 'DETAILS' tab is selected, showing fields for Opportunity Owner (REC Sales Manager), Close Date (31/03/2018), Opportunity Name (Megan Ames), Account Name (Megan Ames), Contract (00000208), and Description. The 'ACTIVITY' tab is also visible, showing a 'Log a Call' button and a 'New 1:1 ...' button.

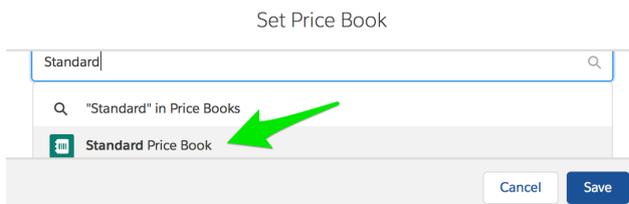
The **Set Price Book** dialog box appears.

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



The screenshot shows the 'Set Price Book' dialog box. The search field is labeled 'Price Book' and contains the text 'Standard'. A green arrow points to the search field. Below the search field, there is a list of results: 'Standard' in Price Books. The 'Save' button is highlighted.

3. Select the price book from the list.



The screenshot shows the 'Set Price Book' dialog box. The search field is labeled 'Price Book' and contains the text 'Standard'. A green arrow points to the search field. Below the search field, there is a list of results: 'Standard' in Price Books. The 'Standard Price Book' item is selected, and a green arrow points to it. The 'Save' button is highlighted.

4. Press **Save**.

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

## How to add a product to the opportunity

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

Product classes are a way to segment the value of territories allowing you to set higher prices for more productive territories. You may only add territories belonging to the selec-

ted product class. The price book will set a default price for the given territory but you can override the default price during negotiation.

## How to add the Product

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

The screenshot shows the Salesforce interface for an Opportunity named 'Megan Ames'. The 'RELATED' tab is active, displaying a table of 'Territories of Interest'. A green arrow and the number '1' highlight the first row of the table, which is 'Territory - Newtown' with a 'Bronze' product classification and an 'Under Review' status.

TERRITORY OF INTERE...	TERRITORY NAME	PRODUCT CLASSIFICATION	STATUS
<a href="#">TOI-0000043</a>	Territory - Newtown	Bronze	Under Review
<a href="#">TOI-0000044</a>	Territory - Blacktown	Bronze	Excluded

## 2. Choose Add Product.

The screenshot shows the 'Opportunity Megan Ames' page. At the top right, there are buttons for '+ Follow', '1:1 Meeting', 'Set Price Book', and 'Add Product'. A green arrow points to the 'Add Product' button. Below the buttons, there are fields for 'Account Name' (Megan Ames), 'Close Date' (31/03/2018), 'Amount', and 'Opportunity Owner' (REC Sales Manager). A progress bar shows stages: 'Reviewing Inf...', 'Territory Reser...', 'Sourcing Fina...', 'Offer to Purch...', 'Long Term Pro...', and 'Closed'. Below the progress bar, there are tabs for 'DETAILS' and 'RELATED'. The 'RELATED' tab is active, showing 'Products (0)' and 'Territories of Interest (2)'. The 'Territories of Interest' table has two rows: 'TOI-0000043 Territory - Newtown Bronze Under Review' and 'TOI-0000044 Territory - Blacktown Bronze Excluded'. On the right, there are tabs for 'ACTIVITY' and 'CHATTER'. The 'ACTIVITY' tab is active, showing 'Log a Call', 'New 1:1 ...', 'New Task', and 'Email'. There is a 'Create new...' field and an 'Add' button. Below that, there is an 'Activity Timeline' section with a dropdown arrow, a refresh icon, and an 'Expand All' button. At the bottom, there is a 'Next Steps' section with a 'More Steps' button and a message: 'No next steps. To get things moving, add a task or set up a meeting.'

The Add Product dialog box appears.

The 'Add Product' dialog box is shown. It has a title bar 'Add Product'. Below the title bar, there is a section for 'Opportunity Megan Ames-'. There are three input fields: '\* Product' with a search icon and placeholder 'Search Products.....', 'Territory' with a search icon and placeholder 'Search Territories...', and '\* Sales Price' with the value '50,000.00'. At the bottom, there are 'Cancel' and 'Save' buttons.

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

The 'Add Product' dialog box is shown with search results. The 'Product' field contains 'Bronze'. A dropdown menu is open, showing search results for 'Bronze'. The first result is 'Bronze Territory Bronze'. A green arrow labeled '1' points to the 'Product' field, and another green arrow labeled '2' points to the 'Bronze Territory Bronze' result. At the bottom, there are 'Cancel' and 'Save' buttons.

#### 4. Begin searching for the Territory.

Add Product

---

Opportunity  
**Megan Ames-**

\*Product

Bronze Territory

Territory

Newtown

Q "Newtown" in Territories

Territory - Newtown

Cancel Save

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

6. Press **Save**.

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Territories More

Opportunity **Megan Ames-** + Follow 1:1 Meeting Set Price Book Add Product

Account Name: Megan Ames Close Date: 31/03/2018 Amount: \$50,000.00 Opportunity Owner: REC Sales Manager

Territory Reser... Sourcing Fina... Offer to Purch... Long Term Pro... Closed Mark Stage as Complete

DETAILS RELATED

Products (1) Add Products Edit Products

PRODUCT	TERRITORY	SALES PRICE	LIST PRICE
Bronze Territory	Territory - Newtown	\$50,000.00	\$50,000.00

View All

Territories of Interest (2) New

TERRITORY OF INTERE...	TERRITORY NAME	PRODUCT CLASSIFICATION	STATUS
TOI-0000043	Territory - Newtown	Bronze	Under Review
TOI-0000044	Territory - Blacktown	Bronze	Excluded

ACTIVITY CHATTER

Log a Call New 1:1 ... New Task Email

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activity

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

The screenshot displays a CRM interface for 'Franchise Recruitment Solutions'. The main header shows navigation tabs: Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, Territories, and More. The current view is for an Opportunity named 'Julian Watson'. The opportunity details include: Account Name (Julian Watson), Close Date (30/9/2022), Amount (AUD 130,000.00), and Opportunity Owner (Julian Christian). A progress bar below the details shows stages: Sourcing Fin..., Long Term Pr..., NDA Sent, NDA Received, and Closed. The 'Add Product' dropdown menu is open, with a green arrow pointing to the 'Create Contract' option. The 'Details' tab on the left shows fields for Opportunity Owner, Opportunity Name, Account Name, Contract, Description, Last Territory ID, and Franchisor Signatory. The 'Activity' tab on the right shows a 'Recap your call...' button and a 'Show All Activities' button.

Field	Value
Opportunity Owner	Julian Christian
Close Date	30/9/2022
Opportunity Name	Julian Watson-
Stage	Sourcing Finance
Account Name	Julian Watson
Probability (%)	80%
Contract	Amount: AUD 130,000.00
Description	Primary Campaign Source
Last Territory ID	a0F5j0000027qGTEAY
UserLookup	
Franchisor Signatory	Fred Smith

Activity	Chatter
Log a Call...	New 1:1 ... New Event More
Recap your call...	Add
Filters: Within 2 months - All activities - All types	Refresh - Expand All - View All
Upcoming & Overdue	No activities to show. Get started by sending an email, scheduling a task, and more.
To change what's shown, try changing your filters.	Show All Activities

» Now click the link to go to the new Contract

The screenshot displays the Franchise Recruitment system interface. At the top, there is a navigation menu with options like Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, Territories, and More. The main content area shows an Opportunity for 'Julian Watson' with details such as Account Name, Close Date (30/9/2022), Amount (AUD 130,000.00), and Opportunity Owner (Julian Christian). A progress bar indicates the current stage is 'Sourcing Fin...'. A modal dialog box titled 'Create Contract' is overlaid on the screen, containing the message: 'A new draft Contract has been created. Click [here](#) to view the new Contract, or click Finish to return to the Opportunity.' A green arrow points to the 'here' link. The modal also features a 'Finish' button. The background interface includes sections for 'Details' and 'Activity'.

# 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.

The screenshot displays the 'Opportunity' page for 'Megan Ames'. At the top, there are action buttons: '+ Follow', '1:1 Meeting', 'Set Price Book', and 'Add Product'. Below this, a summary row shows: Account Name: Megan Ames, Close Date: 8/03/2018, Amount: \$50,000.00, and Opportunity Owner: REC Sales Manager. A progress bar at the bottom of the summary section shows a series of green arrows, with the final arrow labeled 'Closed - Sold' and a 'Change Closed Stage' button. The main content area is divided into 'DETAILS' and 'RELATED' sections. The 'DETAILS' section lists: Opportunity Owner (REC Sales Manager), Opportunity Name (Megan Ames), Account Name (Megan Ames), Contract (00000208), Description, Close Date (8/03/2018), Stage (Closed - Sold), Probability (%) (100%), Amount (\$50,000.00), and Primary Campaign Source (Google Search). The 'RELATED' section is currently empty. To the right, the 'ACTIVITY' and 'CHATTER' sections are visible. The 'ACTIVITY' section includes a 'Log a Call' button, a 'New 1:1 ...' button, a 'New Task' button, and an 'Email' button. Below these is a 'Create new...' input field and an 'Add' button. The 'Activity Timeline' section has a dropdown arrow, a refresh icon, and an 'Expand All' button. The 'Next Steps' section has a 'More Steps' button.

## 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

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# Introducing contracts

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

## Contract statuses

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

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



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.

The screenshot shows the Salesforce interface for an Opportunity record titled "Bob Smith". The top navigation bar includes "Franchise Recruitm...", "Home", "Chatter", "Leads", "Accounts", "Contacts", "Opportunities", "Contracts", "Campaigns", "Territories", and "More". The Opportunity record header shows "Opportunity Bob Smith" with buttons for "Follow", "1:1 Meeting", "Set Price Book", and "Add Product". Below the header, a progress bar shows stages: "Offer to Purch...", "Long Term Pro...", and "Closed". The "DETAILS" section lists fields: Opportunity Owner (REC Sales Manager), Opportunity Name (Bob Smith), Account Name (Bob Smith), Contract (00000207), and Description. A green arrow points to the "Contract 00000207" link. The "ACTIVITY" section shows options for "Log a Call", "New 1:1 ...", "New Task", and "Email".

You now see Contract Details.

The screenshot shows the Salesforce interface for a Contract record titled "00000207". The top navigation bar includes "Franchise Recruitm...", "Home", "Chatter", "Leads", "Accounts", "Contacts", "Opportunities", "Contracts", "Campaigns", "Territories", and "More". The Contract record header shows "Contract 00000207" with buttons for "Follow", "Create Franchise Profile", "Activate", "Edit", and "Email Contract". Below the header, a progress bar shows stages: "Draft", "Documents Issued", "Signed", and "Activated". The "DETAILS" section lists fields: Contract Owner (REC Sales Manager), Contract Number (00000207), Status (Draft), Account Name (Bob Smith), Type Of Agreement (Initial), Contract Start Date (30/03/2018), Contract Term (months) (24), Contract End Date (29/03/2020), Territory (Territory - St Ives), Unexpired Contract Months (24), Master Franchise Profile (FCS NSW), Number Of Further Terms, Further Term Duration (months), and Commencement Date (2/04/2018). The "ACTIVITY" section shows options for "Log a Call", "New Event", "New Task", and "Email".

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.

The screenshot shows a web application interface for contract management. At the top, there is a search bar and navigation tabs including 'Franchise Recruitm...', 'Home', 'Chatter', 'Leads', 'Accounts', 'Contracts', 'Opportunities', 'Campaigns', 'Territories', and 'More'. The 'Contracts' tab is active, displaying a contract for '00000207' with a status of 'Draft'. Below the contract header, there are buttons for '+ Follow', 'Create Franchise Profile', 'Activate', 'Edit', and 'Email Contract'. A progress bar shows stages: 'Draft' (selected), 'Documents Issued', 'Signed', and 'Activated', with a 'Mark Status as Complete' button. The main content area has two tabs: 'DETAILS' and 'RELATED', with a green arrow pointing to the 'RELATED' tab. The 'DETAILS' tab shows fields for Contract Owner (REC Sales Manager), Status (Draft), Account Name (Megan Ames), Type Of Agreement (Initial), Contract Start Date, Contract Term (months), Contract End Date, Contract Number (00000208), Territory (Territory - Newtown), Unexpired Contract Months, Master Franchise Profile (FCS NSW), Number Of Further Terms, Further Term Duration (months), and Commencement Date. On the right, there is an 'ACTIVITY' section with a 'Drawloop' button and a 'Select Document Package' dropdown. Below that, there are buttons for 'Log a Call', 'New Event', 'New Task', and 'Email', along with a 'Create new...' input field and an 'Add' button. At the bottom, there is an 'Activity Timeline' section with a dropdown arrow, a refresh icon, and an 'Expand All' button, and a 'Next Steps' section with a 'More Steps' button.

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

The screenshot shows the Franchise Recruitment system interface. At the top, there is a search bar and navigation tabs including Home, Chatter, Leads, Accounts, Contracts, Opportunities, Campaigns, and Territories. The main content area displays details for Contract 00000207, including Account Name (Bob Smith), Status (Draft), and Contract Start/End Dates. A progress bar shows the contract status: Draft, Documents Issued, Signed, and Activated. Below this, there are sections for DETAILS and RELATED. The RELATED section lists DocuSign Status (0), Fees (0), Contact Roles (0), and KPIs (0). A green arrow points to the 'Add Contact Role' button in the Contact Roles section. To the right, there is an 'ACTIVITY' section with options for Log a Call, New Event, New Task, and Email, and an 'Activity Timeline' section.

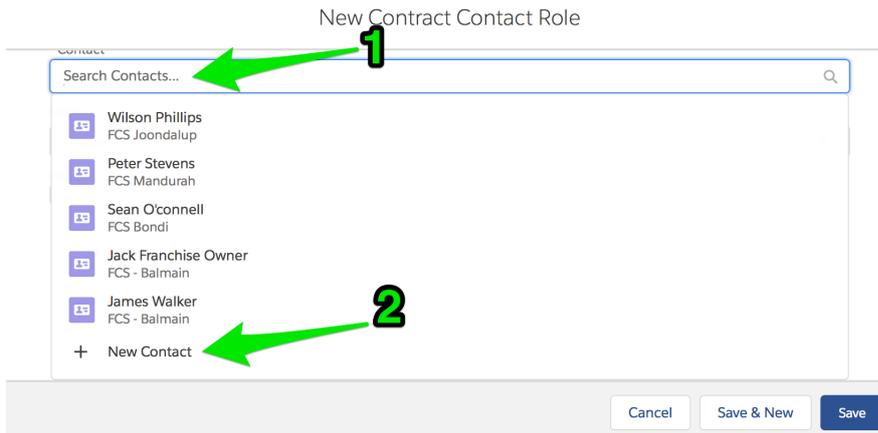
3. The **New Contract Contact Role** dialog box appears.

The 'New Contract Contact Role' dialog box is shown. It has a title bar 'New Contract Contact Role'. The form contains the following fields:

- Contract:** A dropdown menu with the value '00000207' selected.
- Contact:** A search field with the placeholder text 'Search Contacts...'.
- Role:** A dropdown menu with the value '--None--' selected.
- Primary:** A checkbox that is currently unchecked.

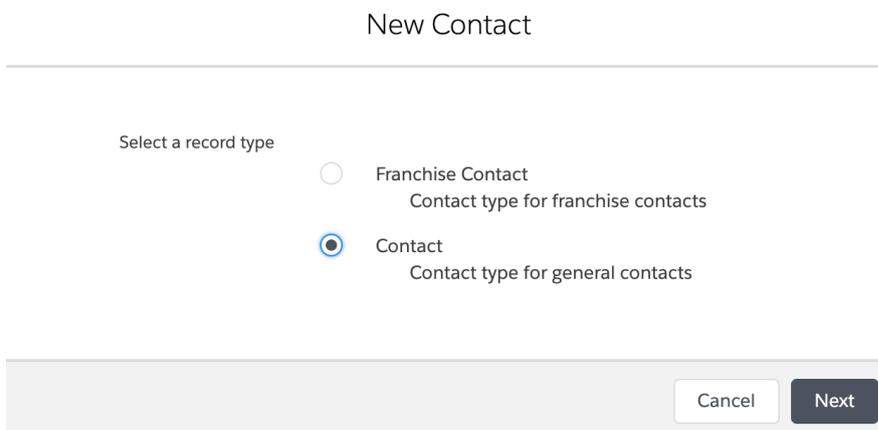
At the bottom of the dialog, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

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**.

New Contact: Contact

**Contact Information**

Contact Owner REC Sales Manager	Phone <input type="text"/>
*Name	Home Phone <input type="text"/>
Salutation Mr. ▼	
First Name Bob	
*Last Name Smith	
Account Name Search Accounts... 🔍	Mobile 0431661889
Title <input type="text"/>	Other Phone <input type="text"/>
Department <input type="text"/>	Fax <input type="text"/>
Birthdate <input type="text" value=""/>	Email b.smith@handyway.com.au
Reports To Search Contacts... 🔍	Assistant <input type="text"/>
Lead Source --None-- ▼	Asst. Phone <input type="text"/>
*Contact Currency AUD - Australian Dollar ▼	

**Address Information**

Mailing Address	Other Address
<input type="text"/>	<input type="text"/>

Cancel Save & New **Save**



7. Select the Role list.

New Contract Contact Role

---

\* Contract  
00000207

\* Contact  
Bob Smith

Role  
--None--

Primary

Cancel Save & New Save

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

New Contract Contact Role

---

\* Contract

Franchisee Owner

Decision Maker

Economic Buyer

Economic Decision Maker

Evaluator

Executive Sponsor

Cancel Save & New Save

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

The screenshot displays the Franchise Recruitment system interface for a contract. At the top, there is a navigation bar with options like Home, Chatter, Leads, Accounts, Contacts, Opportunities, Campaigns, Territories, and More. A search bar is also present. Below the navigation, the contract details for 'Contract 0000207' are shown, including the account name 'Bob Smith' and status 'Draft'. A progress bar indicates the contract's status: Draft, Documents Issued, Signed, and Activated. The 'RELATED' section lists 'Feeds (0)', 'KPIs (0)', and 'Contact Roles (2)'. The 'Contact Roles' section is highlighted with a green box, showing 'Bob Smith' with the role 'Franchisee Owner'. The 'ACTIVITY' section shows options for 'Log a Call', 'New Event', 'New Task', and 'Email'.

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.

The screenshot shows the 'Contract 00000207' page. The 'RELATED' tab is selected and highlighted with a green arrow. The page displays contract details such as Contract Owner (REC Sales Manager), Status (Draft), Account Name (Megan Ames), and Contract Number (00000208). A progress bar at the top indicates the contract is in the 'Draft' stage. The 'ACTIVITY' section on the right includes options for 'Log a Call', 'New Event', 'New Task', and 'Email'.

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

The screenshot shows the 'Contract 00000208' page. The 'RELATED' tab is selected. Under the 'RELATED' section, there are three items: 'DocuSign Status (0)', 'Fees (0)', and 'Contact Roles (0)'. The 'Fees (0)' item is highlighted with a green arrow pointing to the 'New' button. The 'ACTIVITY' section on the right includes options for 'Log a Call', 'New Event', 'New Task', and 'Email'.

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.

The screenshot shows the 'Contracts' page for contract 00000208. The contract status is 'Draft'. A progress bar shows stages: Draft, Documents Issued, Signed, and Activated. The 'RELATED' section shows a 'Fees (1)' table with one entry: Fee-000125, Software Subscription, Fixed, \$500.00. The 'ACTIVITY' section has options for Log a Call, New Event, New Task, and Email, with a 'Create new...' field and an 'Add' button.

ACCOUNT NAME	STATUS	CONTRACT START DATE	CONTRACT END DATE	CONTRACT TERM (MONTHS)
Megan Ames	Draft			

FEE NUMBER	TYPE	CALCULATION TYPE	AMOUNT INC TAX
Fee-000125	Software Subscription	Fixed	\$500.00

### 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`.

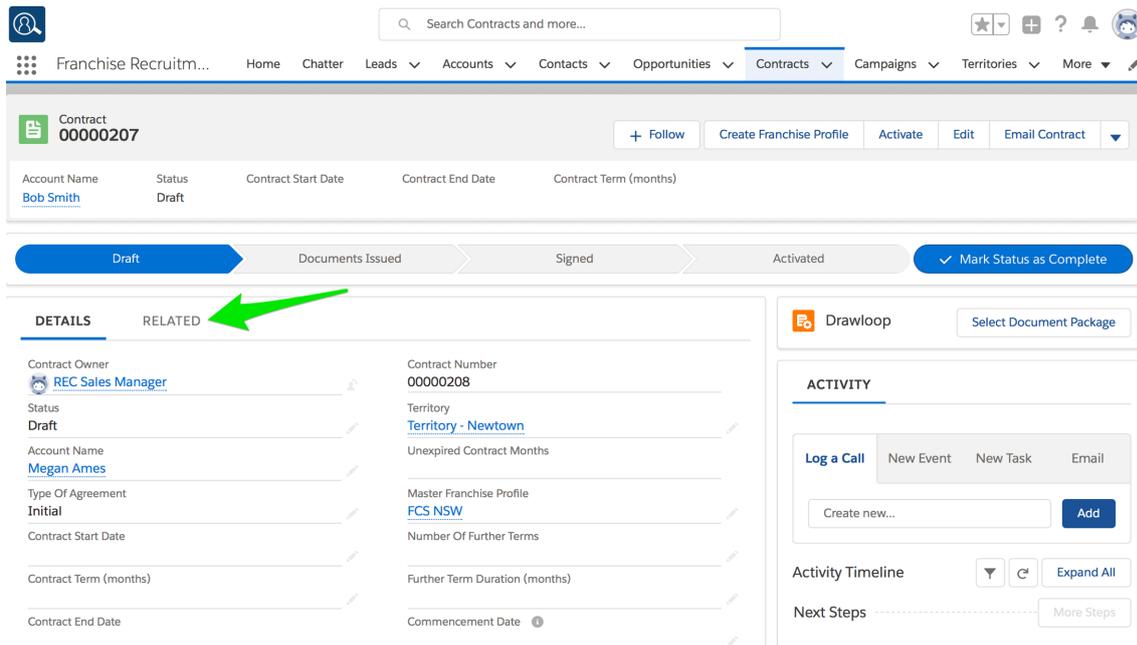
# How to specify contract targets

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.



The screenshot shows the Franchise Recruitment software interface. At the top, there is a search bar and navigation tabs including Home, Chatter, Leads, Accounts, Contracts, Opportunities, Campaigns, Territories, and More. The 'Contracts' tab is selected, showing a contract for 'Contract 00000207' with a status of 'Draft'. Below the contract details, there is a progress bar with stages: Draft, Documents Issued, Signed, and Activated. The 'Draft' stage is currently active. A green arrow points to the 'RELATED' tab in the 'DETAILS' section. The 'RELATED' tab shows a list of contract details, including Contract Owner (REC Sales Manager), Status (Draft), Account Name (Megan Ames), Type Of Agreement (Initial), Contract Start Date, Contract Term (months), Contract End Date, Contract Number (00000208), Territory (Territory - Newtown), Unexpired Contract Months, Master Franchise Profile (FCS NSW), Number Of Further Terms, Further Term Duration (months), and Commencement Date. On the right side, there is an 'ACTIVITY' section with options for 'Log a Call', 'New Event', 'New Task', and 'Email', and a 'Next Steps' section with a 'More Steps' button.

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

The screenshot shows the Salesforce Franchise Recruitment interface. At the top, there is a search bar and navigation tabs for Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, Territories, and More. The main header displays 'Contract 00000208' with buttons for '+ Follow', 'Create Franchise Profile', 'Activate', 'Edit', and 'Email Contract'. Below this, a table lists contract details: Account Name (Megan Ames), Status (Draft), Contract Start Date, Contract End Date, and Contract Term (months). A progress bar shows stages: Draft (active), Documents Issued, Signed, and Activated, with a 'Mark Status as Complete' button. The 'RELATED' section includes 'DocuSign Status (0)', 'Fees (0)', 'Contact Roles (0)', and 'KPIs (0)'. A green arrow points to the 'New' button next to 'KPIs (0)'. The 'ACTIVITY' section on the right includes a 'Log a Call' button and options for 'New Event', 'New Task', and 'Email'.

The New KPI dialog box appears.

The 'New KPI' dialog box is shown. It has a title bar 'New KPI'. The 'Information' section contains: 'KPI Number' (empty), 'Contract' (dropdown menu showing 'Contract 00000208'), '\*Target Date' (calendar icon), and '\*Description' (rich text editor with a toolbar). The 'System Information' section contains 'Currency' (dropdown menu showing 'Australian Dollar'). At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

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

New KPI

---

**Information**

KPI Number

\*Contract  
00000208

\*Target Date  
1/10/2018

\*Description

B I U

**System Information**

Currency  
Australian Dollar

[Cancel](#) [Save & New](#) [Save](#)

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

New KPI

---

**Information**

KPI Number

\*Contract  
00000208

\*Target Date  
1/10/2018

\*Description  
Exceed \$150,000 in sales invoices.

**System Information**

Currency  
Australian Dollar

[Cancel](#) [Save & New](#) [Save](#)

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

The screenshot displays the Salesforce Franchise Recruitment interface for a contract record. At the top, there is a search bar and navigation tabs including Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, Territories, and More. The main header shows the contract ID '00000208' and a status of 'Draft'. Below this, a table lists contract details: Account Name (Megan Ames), Status (Draft), Contract Start Date, Contract End Date, and Contract Term (months). A progress bar indicates the contract's status, with 'Draft' selected and 'Mark Status as Complete' as an option. The 'RELATED' section lists various items: DocuSign Status (0), Fees (0), Contact Roles (0), and KPIs (1). The KPIs section is expanded to show a table with one entry: 'KPI-00030', which is highlighted with a green border. To the right, there is a 'Drawloop' section with a 'Select Document Package' button, and an 'ACTIVITY' section with options to 'Log a Call', 'New Event', 'New Task', or 'Email', along with an 'Add' button. Below the activity section, there are sections for 'Activity Timeline', 'Next Steps' (with a 'More Steps' button), and 'Past Activity'.

# 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**.

The screenshot shows a contract record for 'Contract 00000207' with account name 'Bob Smith' and status 'Draft'. The interface includes a progress bar with stages: Draft, Documents Issued, Signed, and Activated. A 'Mark Status as Complete' button is visible. The 'DETAILS' section lists contract information such as owner, dates, and terms. On the right, the 'Drawloop' section contains a 'Select Document Package' button, which is highlighted with a green arrow. Below this is an 'ACTIVITY' section with options like 'Log a Call', 'New Event', 'New Task', and 'Email', along with an 'Add' button and an 'Activity Timeline' section.

One or more **Document Packages** appear.

The screenshot shows a dropdown menu titled 'Document Package' with a search icon. It lists three options: 'Contract Documents', 'Email Contract', and 'Email Contract (DocuSign)'. Each option has a checkmark in a box to its right. At the bottom of the menu is a 'Run Document Package' button.

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

The screenshot shows the Drawloop interface with a 'Document Package' dropdown menu. The menu is open, showing three options: 'Contract Documents' (selected with a blue checkmark), 'Email Contract', and 'Email Contract (DocuSign)'. Below the dropdown are expandable sections for 'Contact', 'Document Selection', and 'Delivery Option' (marked as 'REQUIRED'). A 'Run Document Package' button is at the bottom.

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.

The screenshot shows the contract details page for contract 00000207. The 'Account Name' field is highlighted in green and contains 'Bob Smith'. The 'Contact' dropdown menu is open, showing a list of contacts: 'None', 'Bob Smith (b.smith@handyway.com.au)', and 'Marlene Smith'. A green arrow points from the 'Bob Smith' contact in the dropdown to the 'Bob Smith' contact in the 'Account Name' field. The page also shows contract status 'Draft', start date '30/03/2018', end date '29/03/2020', and term '24' months.

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

Drawloop

> Document Package **CONTRACT DOCUMENTS**

> Contact **BOB SMITH**

> Document Selection

- Franchise Agreement Optional Document
- Professional Advice Report Optional Document
- Document Receipt Optional Document
- Schedule 1 - All Current Franchisees Optional Document
- Schedule 2 - Ceased Franchisees Optional Document
- Schedule 3 - Pre Owned Territory ... Optional Document

**Next**

> Delivery Option **REQUIRED**

Run Document Package

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

Drawloop

> Document Package **CONTRACT DOCUMENTS**

> Contact **BOB SMITH**

> Document Selection **SELECTED**

> Delivery Option

- Download This is the test file

**Run Document Package**

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

Drawloop

> Document Package **CONTRACT DOCUMENTS**

> Contact **BOB SMITH**

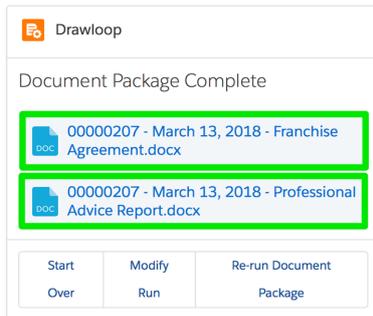
> Document Selection **SELECTED**

> Delivery Option **DOWNLOAD**

40%  
acquiring data

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

- 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.

- 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**.

Contract 00000207

+ Follow Create Franchise Profile Activate Edit **Email Contract**

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
Bob Smith	Draft	30/03/2018	29/03/2020	24

Draft Documents Issued Signed Activated **Mark Status as Complete**

**DETAILS** RELATED

Contract Owner	Contract Number
REC Sales Manager	00000207
Status	Territory
Draft	Territory - St Ives
Account Name	Unexpired Contract Months
Bob Smith	24
Type Of Agreement	Master Franchise Profile
Initial	FCS NSW
Contract Start Date	Number Of Further Terms
30/03/2018	1 (One)
Contract Term (months)	Further Term Duration (months)
24	24
Contract End Date	Commencement Date
29/03/2020	2/04/2018

**Drawloop**

Document Package Complete

- 00000207 - March 13, 2018 - Franchise Agreement.docx
- 00000207 - March 13, 2018 - Professional Advice Report.docx

Start Over Modify Run Re-run Document Package

**ACTIVITY**

An email details page appears.

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

CONTRACT 00000207

BACK TO CONTRACT

On this page you can select a contact (if applicable), select a Document Package to run, and choose how you want to deliver the Document Package.

1. Specify the contact for the Document Package:  
Bob Smith
2. Select Optional Documents to Include:  
Franchising Code of Conduct  
Information Statement
3. Attachments:  
00000207 - March 9, 2018 - Franchise Agreement.docx (Contract)  
00000207 - March 9, 2018 - Professional Advice Report.docx (Contract)  
00000207 - March 9, 2018 - Schedule 1 - All Current Franchisees.docx (Contract)  
00000207 - March 9, 2018 - Schedule 2 - Ceased Franchisees.docx (Contract)  
00000207 - March 9, 2018 - Document Receipt.docx (Contract)  
00000207 - March 9, 2018 - Schedule 3 - Pre Owned Territory Letter.docx (Contract)
4. Choose a delivery method for the Document Package:  
Email

Run Cancel

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.

- Review all the relevant fields, edit the standard email body as needed and review the attachments. When you are ready, press **Send**.

**TASK**  
Send an Email

From: "Franchise Cloud Solutions" <hello@franchisecloudsolutions.com>

To: Contact: Bob Smith

Related To: Contract: 00000207

Additional To:

CC:

BCC:

Subject: Franchise Agreement Documents

Body:

FRANCHISE CLOUD SOLUTIONS

Dear Bob,

Please find the attached franchise sales agreement documents for your review and signature.

Please feel free to reach out if you have any queries.

Thank you,

Cancel Send

Attachments

Action	File	Size
Del	File - Franchising Code of Conduct.pdf	781 KB
Del	File - Information Statement For Prospective Franchisees.pdf	56 KB
Del	File - 00000207 - March 9, 2018 - Franchise Agreement.pdf	80 KB
Del	File - 00000207 - March 9, 2018 - Professional Advice Report.pdf	160 KB
Del	File - 00000207 - March 9, 2018 - Schedule 1 - All Current Franchisees.pdf	266 KB
Del	File - 00000207 - March 9, 2018 - Schedule 2 - Ceased Franchisees.pdf	180 KB
Del	File - 00000207 - March 9, 2018 - Document Receipt.pdf	154 KB
Del	File - 00000207 - March 9, 2018 - Schedule 3 - Pre Owned Territory Letter.pdf	86 KB

- 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

- Download the documents (See “How to generate contract documents” on page 127) then issue them outside the system.
- 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.

Contract Execution

Documents Issued Date  13/03/2018

Customer Signed Date 27/03/2018 ✓

Customer Signed By Bob Smith ✓

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

Contract 0000207 + Follow Create Franchise Profile Edit Clone Delete

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">Bob Smith</a>	Signed	30/03/2018	29/03/2020	24

✓ ✓ **Signed** Activated Deactivation in Pro... Deactivated **✓ Mark Status as Complete**

# 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 screenshot shows a web interface for contract management. At the top, there is a search bar and navigation tabs including 'Home', 'Chatter', 'Leads', 'Accounts', 'Contracts', 'Opportunities', 'Campaigns', and 'Territories'. The 'Contracts' tab is active, displaying a contract for 'Contract 00000207' with account name 'Bob Smith' and status 'Signed'. A green arrow points to the 'Create Franchise Profile' button. Below the contract details, there is a progress bar showing the status 'Signed' and a 'Mark Status as Complete' button. The main content area is divided into 'DETAILS' and 'RELATED' sections. The 'DETAILS' section lists contract information such as 'Contract Owner: REC Sales Manager', 'Contract Name: Territory - St Ives', 'Status: Signed', 'Account Name: Bob Smith', 'Type Of Agreement: Initial', 'Contract Start Date: 30/03/2018', 'Contract Term (months): 24', 'Contract End Date: 29/03/2020', and 'Unexpired Contract Months: 24'. The 'RELATED' section lists 'Contract Number: 00000207', 'Contract Version Number', 'Territory: Territory - St Ives', 'Master Franchise Profile: FCS - NSW', 'Purchase History: PH-000027', 'Previous Contract', 'Number Of Further Terms: 1 (One)', and 'Further Term Duration (months): 24'. On the right side, there is a 'Drawloop' section with a 'Select Document Package' button and an 'ACTIVITY' section with options for 'Log a Call', 'New Event', 'New Task', and 'Email'. There is also a 'Create new...' button and an 'Add' button. Below the activity section, there are filters for 'All time', 'All activities', and 'All types', and buttons for 'Refresh' and 'Expand All'. The 'Next Steps' section shows 'No next steps. To get things moving, add a task or set up a meeting.' and the 'Past Activities' section is empty.

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

Create Franchise Profile

---

You are about to create a Franchise Account and Contact.

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

The screenshot shows the Salesforce interface for an Account record. At the top, there is a search bar and navigation tabs for Franchise Recruitment, Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, Territories, and More. The Account record is titled "Territory - St Ives" and is currently "Inactive". The Billing Address is "12 Myrtle Street, St Ives NSW 2075, Australia". The Account Owner is "REC Sales Manager". The Account details include fields for Parent Account, Status (Inactive), Timezone, Next Review Due Date, and Next Review Date. The Business Information section includes Legal Entity Name (Shortbridge Trading), Business Number (49 8887 3382929), Trading Name (FCS St Ives), and Operating Structure (Pty Ltd Company). The Activity and Chatter sections are also visible, showing options to log a call, create new events, tasks, or emails, and view the activity timeline.

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.

Contract 00000207 + Follow Create Franchise Profile Edit Clone Delete

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">Bob Smith</a>	Activated	30/03/2018	29/03/2020	24

✓ ✓ ✓ **Activated** Deactivation in Pro... Deactivated ✓ Mark Status as Complete



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



# CHAPTER 6

## Working with Accounts

Overview of account types .....	140
When a franchise opportunity turns out to be an employment candidate .....	142

# Overview of account types

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

Account type	Purpose within Franchise Recruitment
Franchise Sales	A prospect qualified for the purchase of a franchise license.
Business Account	<p>To represent a prospect that will be purchasing the franchise under a company name.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">  <p>This is rarely used. In most cases where a company is the legal entity performing the purchase a Franchise Sales account is still preferable.</p> </div>
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 screenshot shows the Salesforce interface for an account named 'Phuong Ngo'. The account details include Position (Painter), Current Employer (M.J.Harris Painting), Mobile (0404778678), and Email (phuong.ngo@gmail.com). A green arrow points to the 'Change Record Type' button in the top right corner of the account header.

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

## Change Account Record Type

Existing picklists aren't updated when record types change. You'll need to change picklist values manually.

Select a record type for **Phuong Ngo**

Available record types

- Franchise Sales  
Person Account Record type for Franchise Sales
- Employment Candidate  
Employment Candidates

Cancel Next



When the account type is Franchise Sales, the **Change Account Record Type** dialog box will appear with Employment Candidate selected.

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

Edit Account

---

**Account Information**

* Account Name	Account Owner
Salutation --None--	REC Sales Manager
First Name Phuong	
* Last Name Ngo	
Mobile 0404778678	* Initial Contact Date 13/03/2018
Email phuong.ngo@gmail.com	
Next Review Due Date	

**Address Information**

Mailing Address

Mailing Street  
6 Wonga Road

Mailing Suburb  
Ringwood

Mailing State  
VIC

Mailing Postcode  
3134

Mailing Country  
Australia

**Marketing Information**

Preferred Communication Channel  
Email

Unsubscribe

SMS Unsubscribe <sup>i</sup>

**Additional Information**

\* Area of Interest  
Buy a Franchise

Country of Interest <sup>i</sup>  
Australia

Latest Closed Sold Date <sup>i</sup>

State of Interest <sup>i</sup>  
VIC

- 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

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# Working with prospects on the phone

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



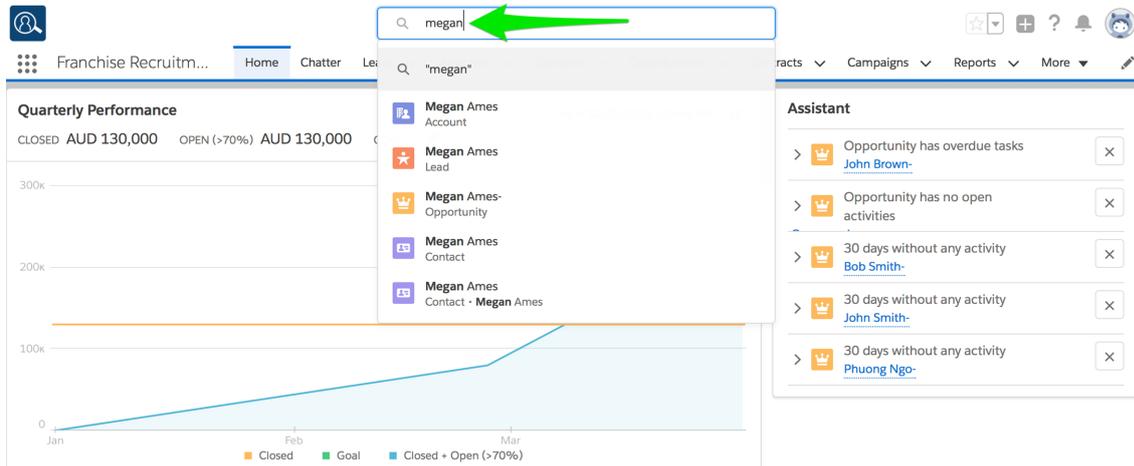
When recording new leads over the phone, See “Manually created leads” on page 48.

## How to locate the right record

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

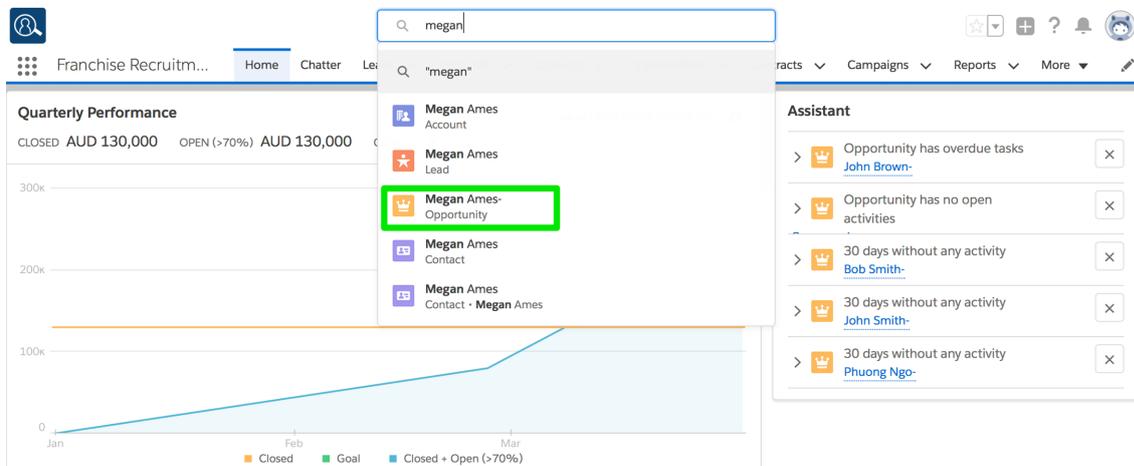
### To locate a person's record

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



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.

The screenshot shows the CRM interface for an opportunity named "Megan Ames-". The opportunity owner is "REC Sales Manager". The account name is "Megan Ames", the close date is "8/03/2018", and the amount is "\$50,000.00". The stage is "Closed - Sold". A green box highlights the stage dropdown menu, and a green arrow points to the "Account Name" link "Megan Ames".

Account Name	Close Date	Amount	Opportunity Owner
<a href="#">Megan Ames</a>	8/03/2018	\$50,000.00	<a href="#">REC Sales Manager</a>

Opportunity Owner: [REC Sales Manager](#)  
Close Date: 8/03/2018  
Opportunity Name: Megan Ames-  
Account Name: [Megan Ames](#)  
Contract: [00000208](#)  
Description: [Empty]

Close Date: 8/03/2018  
Stage: Closed - Sold  
Probability (%): 100%  
Amount: \$50,000.00  
Primary Campaign Source: [Google Search](#)

Activity Timeline: [Empty]  
Next Steps: [Empty]

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

The screenshot shows the CRM interface for an opportunity named "Mr. Alexander Ivanov". The opportunity owner is "REC Sales Manager". The account name is "Alexander Ivanov", the close date is "31/03/2018", and the amount is "\$50,000.00". The stage is "Closed". A green box highlights the stage dropdown menu.

Account Name	Close Date	Amount	Opportunity Owner
<a href="#">Alexander Ivanov</a>	31/03/2018	\$50,000.00	<a href="#">REC Sales Manager</a>

Opportunity Owner: [REC Sales Manager](#)  
Close Date: 31/03/2018  
Opportunity Name: Mr. Alexander Ivanov-  
Account Name: [Alexander Ivanov](#)  
Contract: [00000212](#)  
Description: [Empty]

Close Date: 31/03/2018  
Stage: One on One Meeting  
Probability (%): 30%  
Amount: \$50,000.00  
Primary Campaign Source: [Empty]

Activity Timeline: [Empty]  
Next Steps: [Empty]

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

The screenshot shows a CRM dashboard for 'Franchise Recruitm...'. At the top, there are navigation tabs for 'Home', 'Chatter', and 'Leads'. A search bar at the top center contains the text 'andreas', and a dropdown menu below it shows a search result for 'Andreas Fotos' with a red star icon and the word 'Lead' below it, which is highlighted with a green rectangular box. To the left, a 'Quarterly Performance' chart displays data for January, February, and March. The chart shows a blue line representing 'Closed + Open (>70%)' which rises from near zero in January to approximately 250k in March. A horizontal orange line represents the 'Goal' at approximately 130k. The legend indicates 'Closed' (orange square), 'Goal' (green square), and 'Closed + Open (>70%)' (blue square). To the right, an 'Assistant' panel lists several task notifications, such as 'New lead assigned to you today' for 'Andreas Fotos' and '30 days without any activity' for several other contacts.

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.

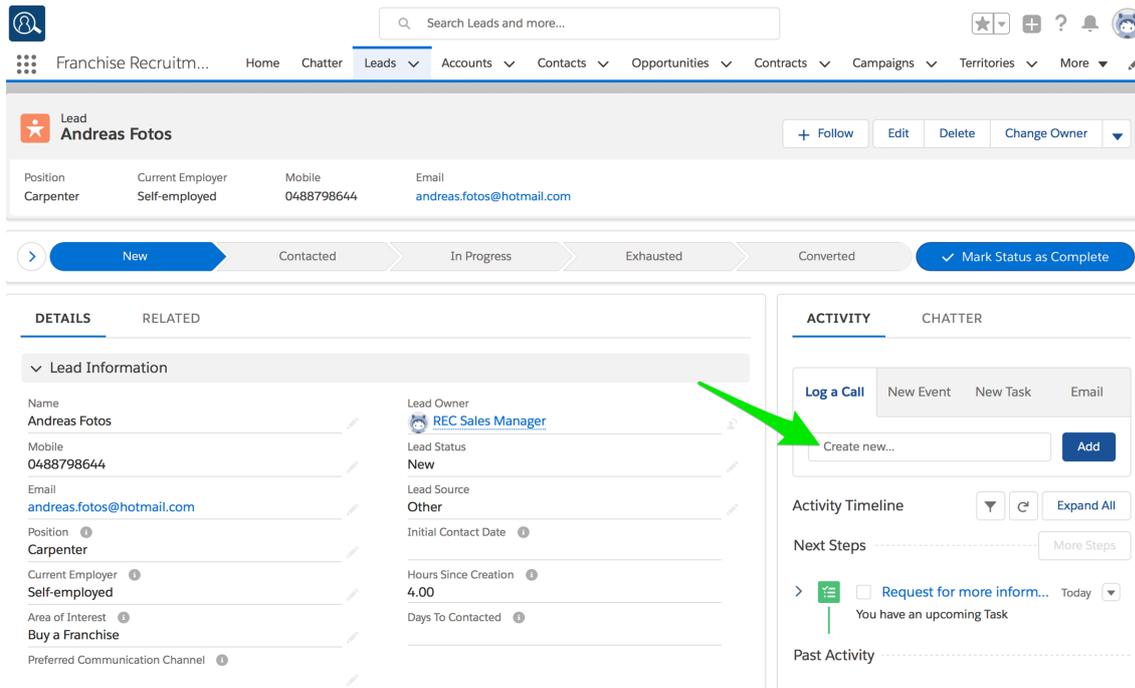
 To enter new customers, See “Manually created leads” on page 48.

# 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 screenshot shows the CRM interface for lead 'Andreas Fotos'. The 'Log a Call' form is open, and the 'Subject' field contains 'Returned your call' and the 'Comments' field contains 'Yes tomorrow is fine.'. A green arrow points to the 'Save' button. The 'DETAILS' tab is active, showing lead information such as Name, Mobile, Email, Position, Current Employer, Area of Interest, and Preferred Communication Channel. The 'ACTIVITY' tab is also visible, showing the 'Log a Call' button and the 'Activity Timeline' section.

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

The screenshot shows the CRM interface for lead 'Andreas Fotos'. The 'Log a Call' form is now closed, and the 'Activity Timeline' section is visible. The call entry 'Returned your call' is now listed in the 'Past Activity' section, with a green box highlighting it. The 'Next Steps' section shows 'No next steps. To get things moving, add a task or set up a meeting.' The 'DETAILS' tab is still active, showing lead information. The 'ACTIVITY' tab is also visible, showing the 'Log a Call' button and the 'Activity Timeline' section.

## 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 screenshot displays the Salesforce interface for an Opportunity record titled "Mr. Alexander Ivanov". The "Activity" pane is open, and the "Email" tab is selected, as indicated by a green arrow. The "Email" tab shows a form for logging an email, with fields for Subject, Comments, Name, and Related To (Mr. Alexander Ivanov). A "Save" button is visible at the bottom right of the form.

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.

The screenshot shows the Salesforce interface for an opportunity named "Mr. Alexander Ivanov". The opportunity owner is "REC Sales Manager". The account name is "Alexander Ivanov". The close date is "31/03/2018". The opportunity owner is "REC Sales Manager". The opportunity name is "Mr. Alexander Ivanov". The account name is "Alexander Ivanov". The contract number is "00000212". The description is "1:1 Meeting". The preferred date is "1" and the preferred time is "1".

A contact card for "Alexander Ivanov" is open, showing his position as "Brick-layer", current employer as "Walls R Us", and email address as "alexander.ivanov@...". A context menu is open over the email address with the following options: "Copy Email Address", "Share", "Inspect Element", and "Services". A green arrow labeled "1" points to the "Copy Email Address" option.

The "ACTIVITY" tab is selected, showing an email composition window. The "From" field is "REC Sales Manager <dean.llewellyn@f...>". The "To" field is empty. The "Cc" field is empty. The "Bcc" field contains "dean.llewellyn@franchisecloudso...". The "Subject" field is "Enter Subject...". A green arrow labeled "2" points from the "To" field to the right.

#### 4. Complete Subject and Details then press Send.

The screenshot displays a CRM interface for an opportunity named "Mr. Alexander Ivanov". The top navigation bar includes "Franchise Recruitm...", "Home", "Chatter", "Leads", "Accounts", "Contacts", "Opportunities", "Contracts", "Campaigns", "Territories", and "More". A search bar for "Salesforce" is visible. The opportunity details show the account name "Alexander Ivanov", close date "31/03/2018", and owner "REC Sales Manager". The opportunity stage is "One on One Meeting".

The "DETAILS" section on the left includes fields for Opportunity Owner (REC Sales Manager), Opportunity Name (Mr. Alexander Ivanov), Account Name (Alexander Ivanov), Contract (00000212), and Description. It also features sections for "1:1 Meeting" (with preferred dates and times), "Demonstration Day Information" (with demonstration day and date), "1:1 Meeting Follow Up Emails" (with checkboxes for various email types), and "Timeline Information".

The "ACTIVITY" section on the right shows an email composition window. The "Subject" field is highlighted with a green box and contains the text "Additional meeting times". The email body is also highlighted with a green box and contains the text: "Hi Alexander", "Just checked my schedule, I'm also available on the 15th and the 18th all day and evening. Is that of interest?", "Yours,", "Dean". A green arrow points to the "Send" button at the bottom right of the email composition window.

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

The screenshot shows the Salesforce interface for an Opportunity record. The top navigation bar includes 'Franchise Recruitm...', 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Contracts', 'Campaigns', 'Territories', and 'More'. The Opportunity record is for 'Mr. Alexander Ivanov', owned by 'REC Sales Manager', with a close date of '31/03/2018'. The 'DETAILS' tab is active, showing fields for Opportunity Owner, Name, Account Name, Contract, and Description. The 'ACTIVITY' tab is also visible, showing a list of activities. A specific activity, 'Additional meeting ...', is highlighted with a green box, indicating that an email was sent to Alexander Ivanov.



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

The screenshot shows the 'Email' activity creation form in Salesforce. The 'From' field is set to 'REC Sales Manager <mike@franchisec...>'. The 'To' field is empty. The 'Related To' field is set to 'Alexander Ivanov'. The 'Send' button is visible. A green box highlights the 'Send' button, indicating that the email has been sent.

## 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.



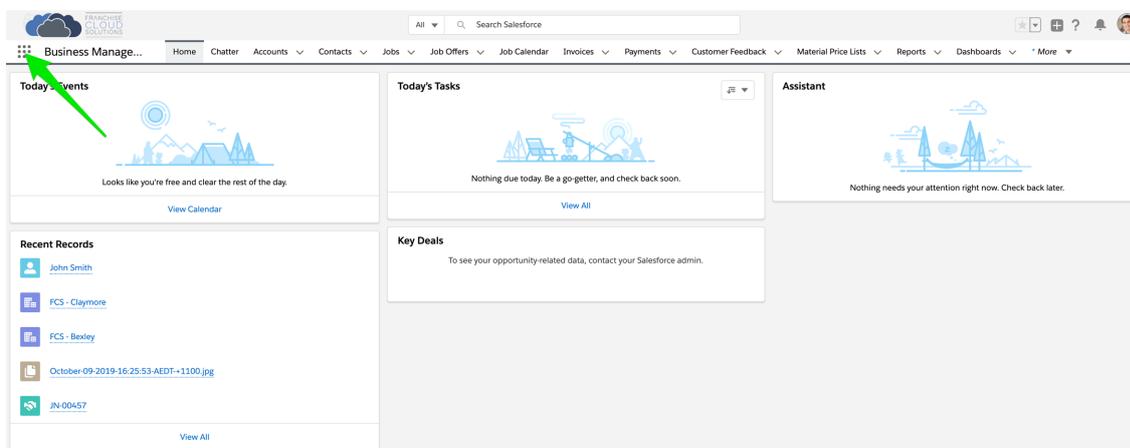
Ask your system administrator to edit the templates for you.

## How to review email template headers and footers

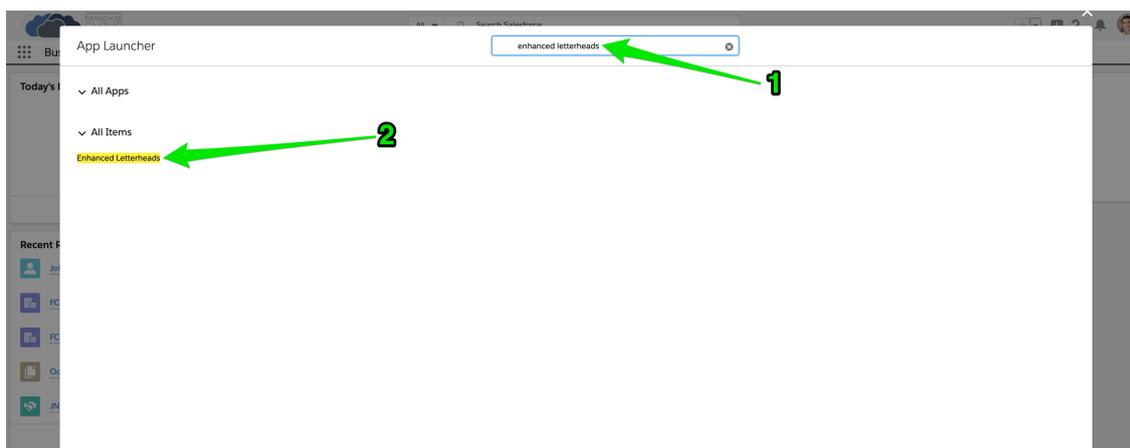
Most likely your franchisor will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

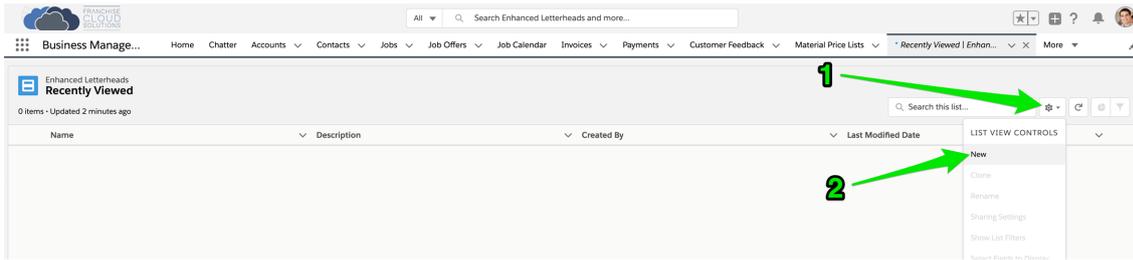
1. Open the App Launcher.



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**.

New List View

\*List Name

All

Who sees this list view?

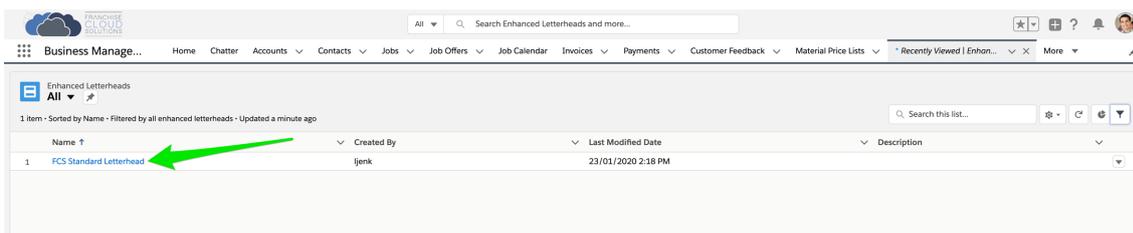
Only I can see this list view

All users can see this list view

Share list view with groups of users

Cancel Save

5. Now select the **Standard Letterhead**.



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

Enhanced Letterhead  
**FCS Standard Letterhead**

Description

**Details**

Information

Name: FCS Standard Letterhead  
Description:

Letterhead Content

Header



Footer  
{{{Sender.Email\_Signature\_\_0}}}

System Information

Created By: Loryn Jenkins, 23/01/2020 2:18 PM  
Last Modified By: Loryn Jenkins, 23/01/2020 2:18 PM

Enhanced Letterhead  
**FCS Standard Letterhead**

Description

**Details**

Information

Name: FCS Standard Letterhead  
Description:

Letterhead Content

Header



Footer  
{{{Sender.Signature\_\_0}}}

System Information

Created By: Loryn Jenkins, 23/01/2020 2:18 PM  
Last Modified By: Loryn Jenkins, 25/03/2020 4:46 PM



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

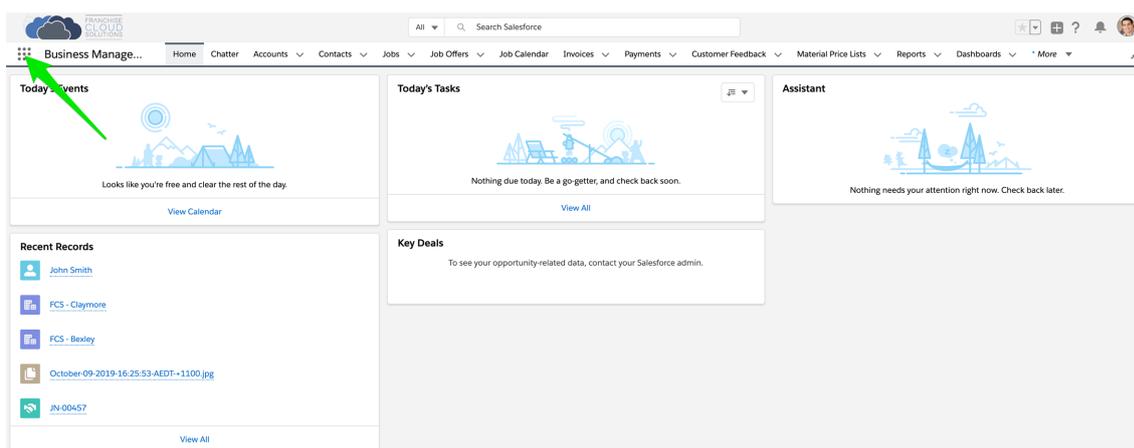
- » customized header and footers

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

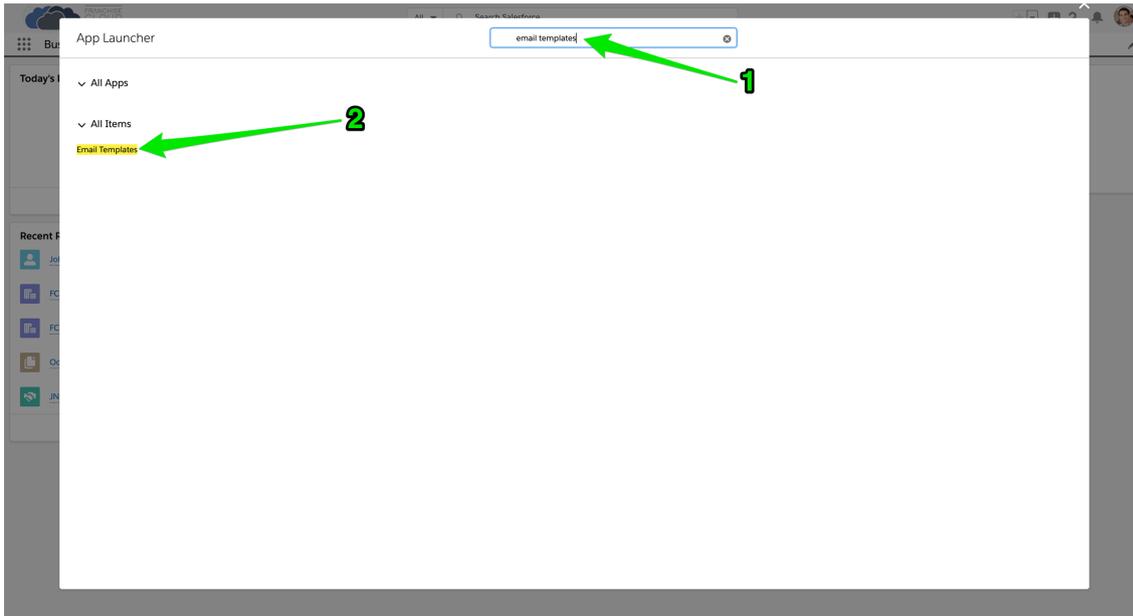
- ✓ Email templates that are frequently created by our clients include
  - » New customer initial contact
  - » Returning customer initial contact
  - » New Quote Job request
  - » New Do & Charge Job request
  - » Scheduled appointment notification
  - » Quote email
  - » Invoice email
  - » Invoice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

## To create a custom email template

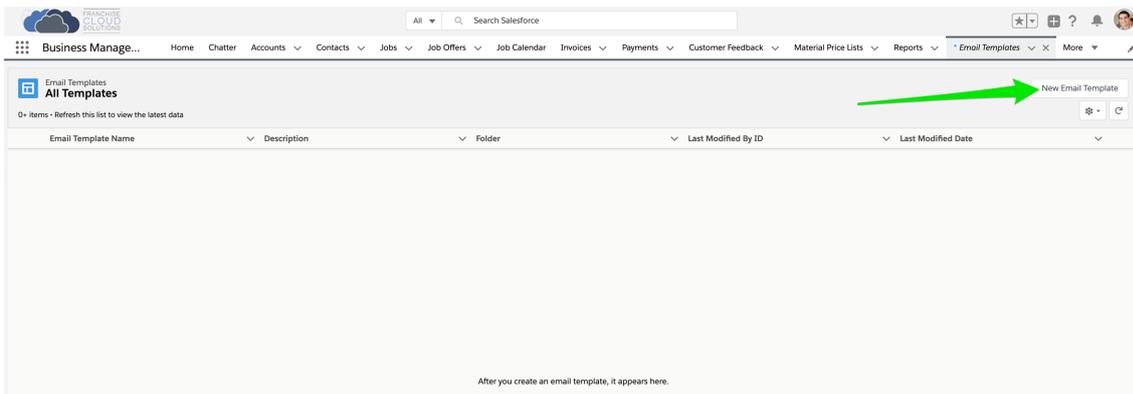
### 1. Open the App Launcher.



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.

New Email Template

**Information**

\* Email Template Name  

Related Entity Type

Description

Folder

**Message Content**

Subject

Enhanced Letterhead

HTML Value

Source Font Size **B** *I* U **A**                                



**Additional Information**

Created By

Last Modified By

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

New Email Template

**Information**

\*Email Template Name

Description

**Message Content**

Subject

HTML Value

**B** *I* U **A**

Related Entity Type

-- None --

- Catalog Profile
- Check-In
- Contact
- Course
- Customer Feedback
- DocuSign Recipient Status
- DocuSign Status
- Instructor
- Invoice
- Job**
- Job Offer

**Additional Information**

Created By

Last Modified By

6. Enter an email subject line.

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

Source Font Size B I U A [List Icons]

**Additional Information**

Created By: Last Modified By:

## 7. Select an appropriate letterhead.

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value:

*(Note: A green arrow points to the "FCS Standard Letterhead" option in the dropdown menu.)*

**Additional Information**

Created By: Last Modified By:



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

8. Enter boilerplate text into the HTML Value field.

New Email Template

**Information**

\* Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

Source Font Size **B** *I* U **A** [List] [List] [List] [List] [List] [List] [List] [List] [List] [List]

Dear ,

Please find attached your quote for job .

Feel free to contact me if you have any queries or need further information about the work.

Thank you,|

**Additional Information**

Created By: Last Modified By:

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

New Email Template

**Information**

*Email Template Name My Quote Email Template	Related Entity Type Job
Description	Folder Private Email Templates

**Message Content**

Subject FCS Invoice - {{{FCS_OPS__Job__c.Name}}}	Enhanced Letterhead FCS Standard Letterhead
---	--

HTML Value

Dear ,

Please find attached your quote for job .

Feel free to contact me if you have any queries or need further information about the work.

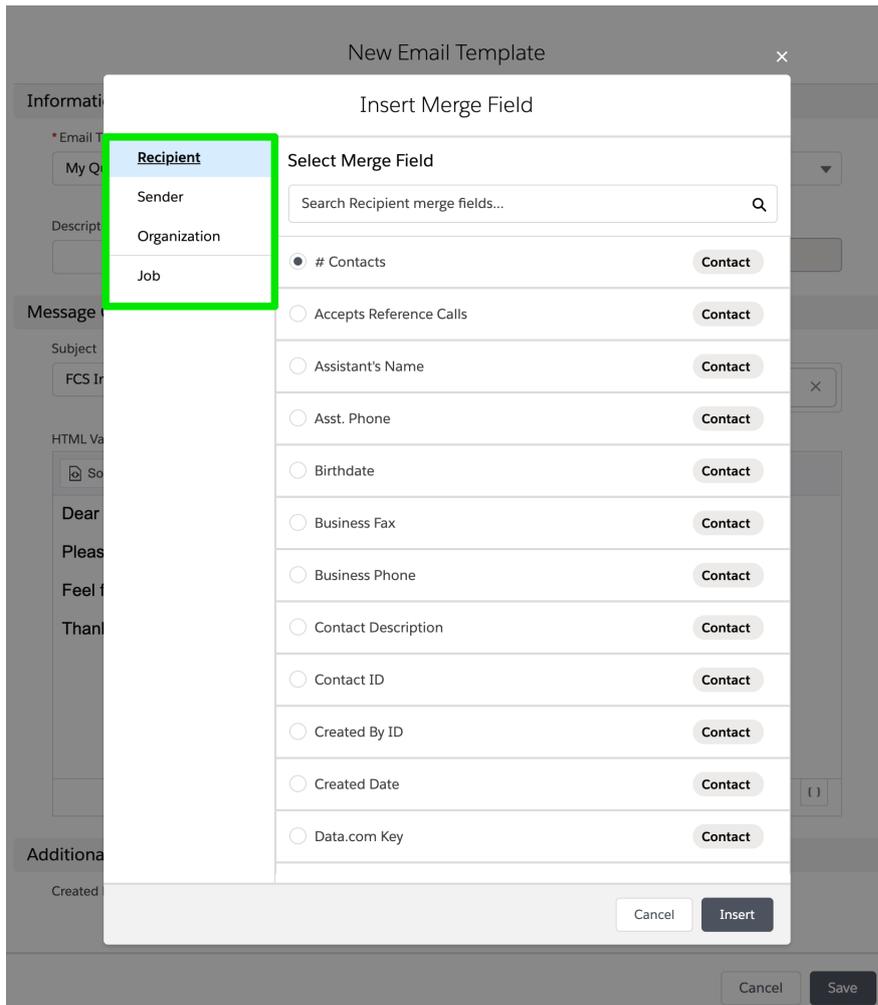
Thank you,



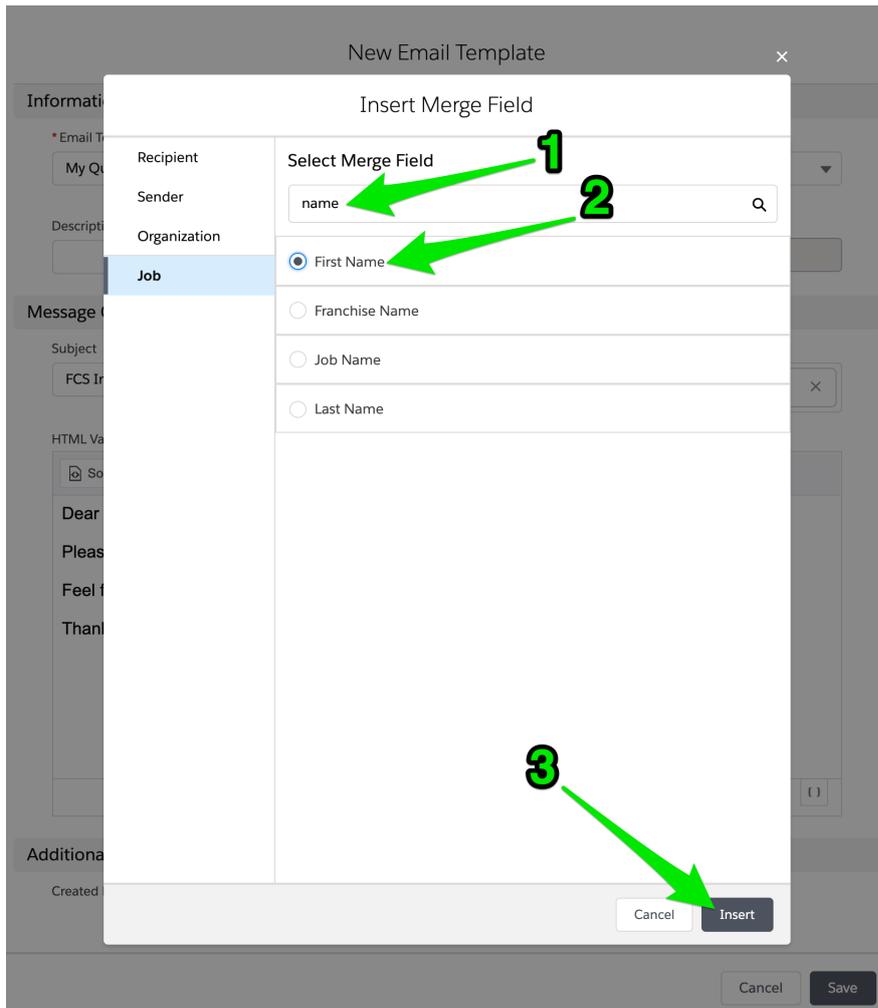
**Additional Information**

Created By	Last Modified By
------------	------------------

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.

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

Dear {{{FCS\_OPS\_\_Job\_\_c.FCS\_OPS\_\_First\_Name\_\_c}}},  
Please find attached your quote for job {{{FCS\_OPS\_\_Job\_\_c.Name}}}. |  
Feel free to contact me if you have any queries or need further information about the work.  
Thank you,

**Additional Information**

Created By: Last Modified By:



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.

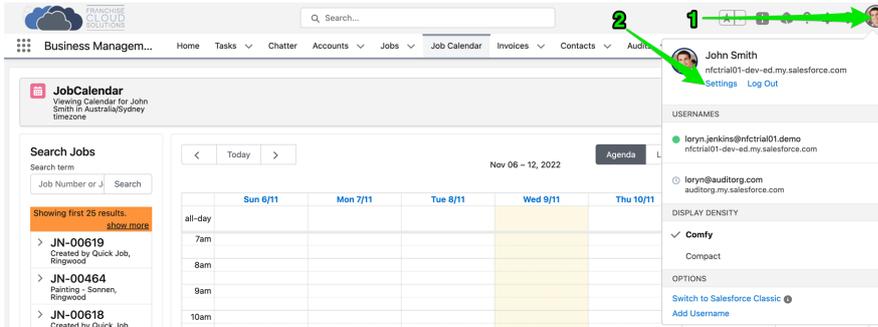
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.

# How to send all emails to my inbox

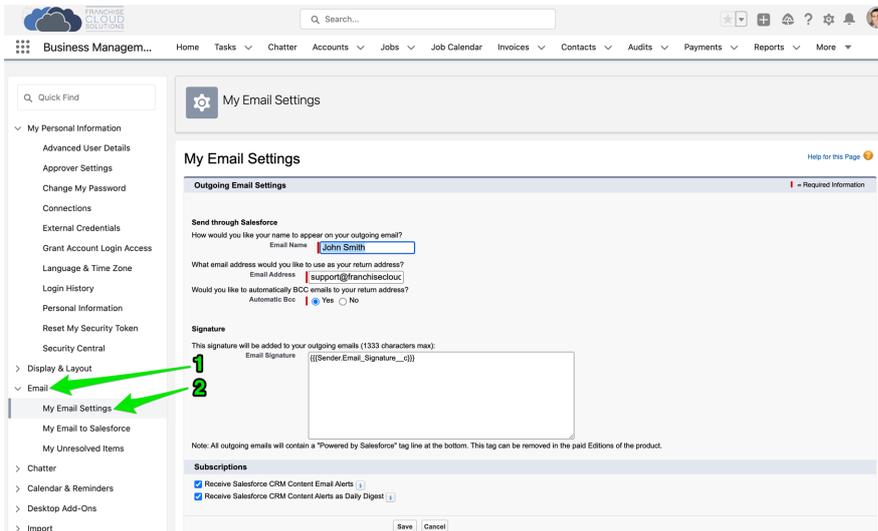
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

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.

The screenshot shows the 'My Email Settings' page in Salesforce. The 'Outgoing Email Settings' section is expanded, showing the following fields:

- Send through Salesforce:** How would you like your name to appear on your outgoing email?  
Email Name:
- What email address would you like to use as your return address?:**  
Email Address:
- Would you like to automatically BCC emails to your return address?:**  
Automatic Bcc:  Yes  No

A green arrow labeled '1' points to the 'Yes' radio button. Below this, there is a 'Signature' section with a text area containing '[[SenderEmail\_Signature\_\_c]]'. At the bottom of the page, there is a 'Subscriptions' section with two checked checkboxes: 'Receive Salesforce CRM Content Email Alerts' and 'Receive Salesforce CRM Content Alerts as Daily Digest'. A green arrow labeled '2' points to the 'Save' button at the bottom of the form.



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.

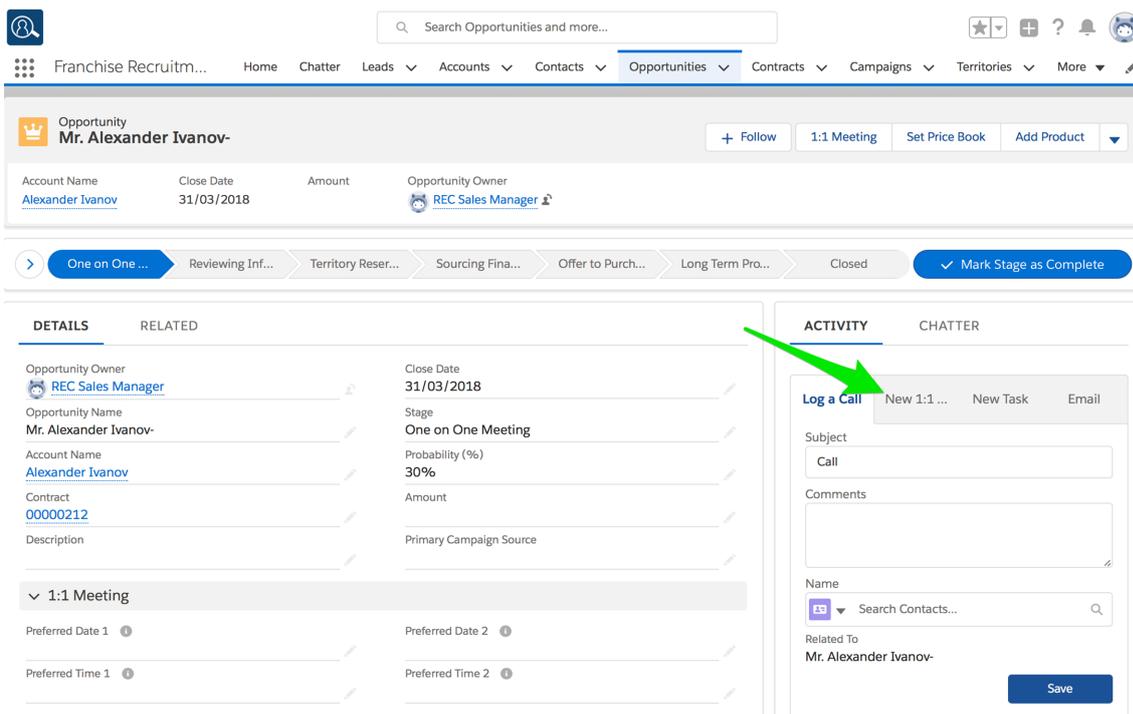
# How to schedule a one on one meeting

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.



The screenshot shows the Salesforce interface for an Opportunity record titled "Mr. Alexander Ivanov". The "Opportunities" tab is selected in the top navigation bar. Below the header, there are buttons for "+ Follow", "1:1 Meeting", "Set Price Book", and "Add Product". The record details include Account Name (Alexander Ivanov), Close Date (31/03/2018), Amount, and Opportunity Owner (REC Sales Manager). A progress bar at the bottom shows the current stage as "One on One...".

The "DETAILS" section is expanded to show the "1:1 Meeting" tab. The "ACTIVITY" section is also visible, showing a "Log a Call" button highlighted with a green arrow. Other activity options include "New 1:1...", "New Task", and "Email". The "Log a Call" button is located at the top of the activity list.

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

ACTIVITY    CHATTER

Log a Call    **New 1:1 ...**    New Task    Email

\* Start  
Date: 29/03/2018    Time: 5:30 PM

\* End  
Date: 29/03/2018    Time: 6:30 PM

Related To  
Mr. Alexander Ivanov

Location  
Head Office

Description  
Alexander's preferred time.

\* Assigned To  
REC Sales Manager

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.

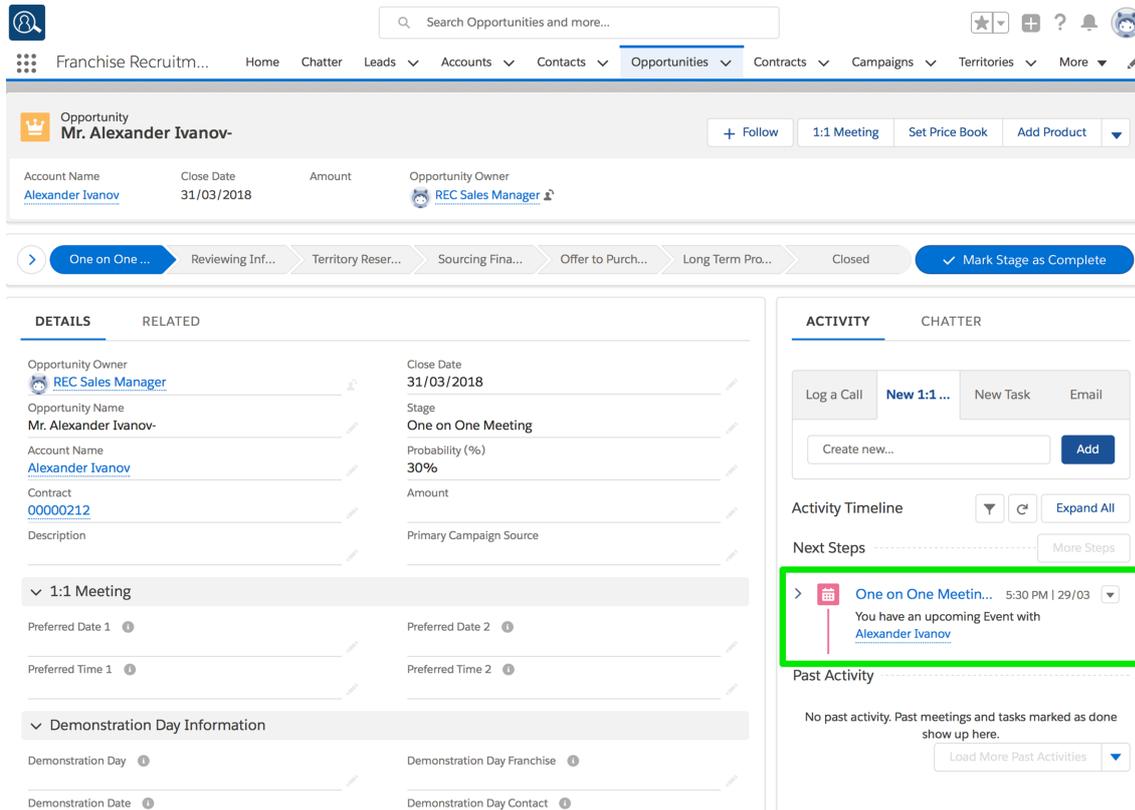
# How to reschedule a one on one meeting

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.



The screenshot shows the Salesforce interface for an Opportunity record titled "Mr. Alexander Ivanov". The record is in the "One on One Meeting" stage. The "Next Steps" list on the right side of the page contains a single event: "One on One Meeting" scheduled for 5:30 PM on 29/03. This event is highlighted with a green box. The "Past Activity" section below it shows "No past activity. Past meetings and tasks marked as done show up here."

Opportunity Owner	Close Date
REC Sales Manager	31/03/2018

Opportunity Name	Stage
Mr. Alexander Ivanov	One on One Meeting

Account Name	Probability (%)
Alexander Ivanov	30%

Contract	Amount
00000212	

Preferred Date 1	Preferred Date 2

Preferred Time 1	Preferred Time 2

Demonstration Day	Demonstration Day Franchise

Demonstration Date	Demonstration Day Contact

Next Steps	More Steps
>  One on One Meetin... 5:30 PM   29/03	

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

The screenshot shows a CRM interface for an opportunity record. The top navigation bar includes 'Franchise Recruitm...', 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Contracts', 'Campaigns', 'Territories', and 'More'. A search bar is present with the text 'Search Opportunities and more...'. The main header for the opportunity is 'Mr. Alexander Ivanov' with a '+ Follow' button and buttons for '1:1 Meeting', 'Set Price Book', and 'Add Product'. Below this is a summary row with fields for 'Account Name' (Alexander Ivanov), 'Close Date' (31/03/2018), 'Amount', and 'Opportunity Owner' (REC Sales Manager). A progress bar shows stages: 'One on One ...', 'Reviewing Inf...', 'Territory Reser...', 'Sourcing Fina...', 'Offer to Purch...', 'Long Term Pro...', 'Closed', and 'Mark Stage as Complete'. The 'DETAILS' tab is active, showing fields for 'Opportunity Owner' (REC Sales Manager), 'Close Date' (31/03/2018), 'Opportunity Name' (Mr. Alexander Ivanov), 'Account Name' (Alexander Ivanov), 'Contract' (00000212), 'Description', 'Stage' (One on One Meeting), 'Probability (%)' (30%), 'Amount', and 'Primary Campaign Source'. There are also fields for 'Preferred Date 1', 'Preferred Date 2', 'Preferred Time 1', and 'Preferred Time 2'. A section for 'Demonstration Day Information' includes 'Demonstration Day', 'Demonstration Day Franchise', 'Demonstration Date', and 'Demonstration Day Contact'. The 'ACTIVITY' tab is also visible, showing a 'Next Steps' section with a 'New 1:1...' button and an 'Activity Timeline' section. A context menu is open over an activity record titled 'One on One Meetin...' with a date of '5:30 PM | 29/03'. The menu options are 'Change Record Type', 'Edit', and 'Delete'. Green arrows and numbers '1' and '2' indicate the 'Edit' option.

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

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

Edit One on One Meeting - Mr. Alexander Ivanov-

\* Assigned To  
REC Sales Manager

Location  
Head Office

\* Subject  
One on One Meeting - Mr. Alexander Ivanov-

\* Start  
Date: 29/03/2018 Time: 6:30 PM

\* End  
Date: 29/03/2018 Time: 7:30 PM

Name  
Alexander Ivanov

Related To  
Mr. Alexander Ivanov-

\* Activity Currency  
Australian Dollar

Created By  
REC Sales Manager, 20/03/2018 1:20 PM

Last Modified By  
REC Sales Manager, 20/03/2018 1:20 PM

Description  
Alexander's preferred time.

Cancel Save & New 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 screenshot shows the Salesforce Calendar interface. At the top, there is a search bar and navigation tabs for various Salesforce features. The main area displays a calendar grid for March 19, 2018, to March 25, 2018. On the right side, there is a calendar navigation panel for the month of March 2018. A dropdown menu is open, showing options for 'My Calendars' and 'Other Calendars'. The 'Other Calendars' section is expanded, showing 'Show Only This Calendar' and 'Share Calendar'. A green arrow labeled '1' points to the 'My Events' option in the 'My Calendars' section. Another green arrow labeled '2' points to the 'Share Calendar' option in the 'Other Calendars' section.

The **Share Calendar** dialog box appears.

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

Share Calendar

---

Share With \* Access

Search People...

[Access Descriptions](#)

> Who Has Access

## 3. Press Share.

Share Calendar

---

Share With \* Access

[Access Descriptions](#)

> Who Has Access

You have now shared your calendar.



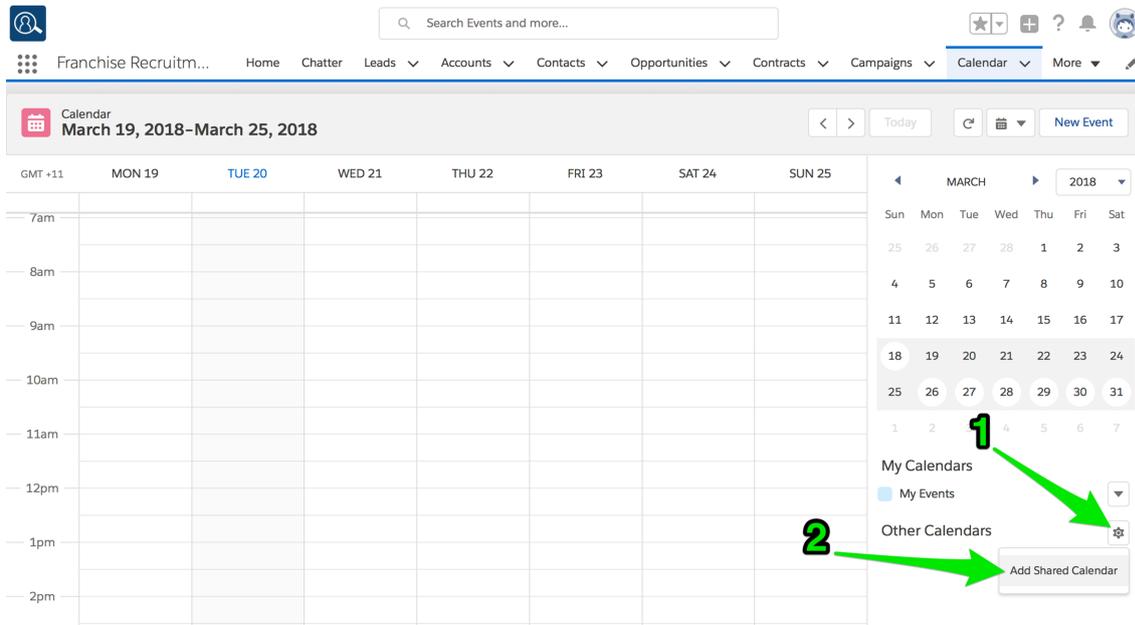
You can check who you have shared your calendar with by selecting **Who Has Access** in the **Share Calendar** dialog box.

## 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.

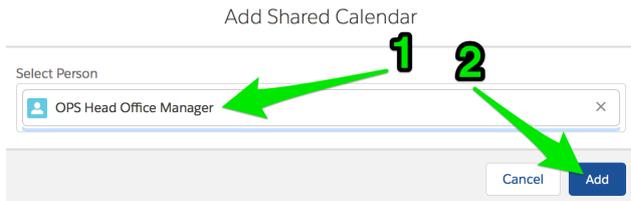
2. Search and then select the person whose calendar you want to view, and then press **Add**.

Add Shared Calendar

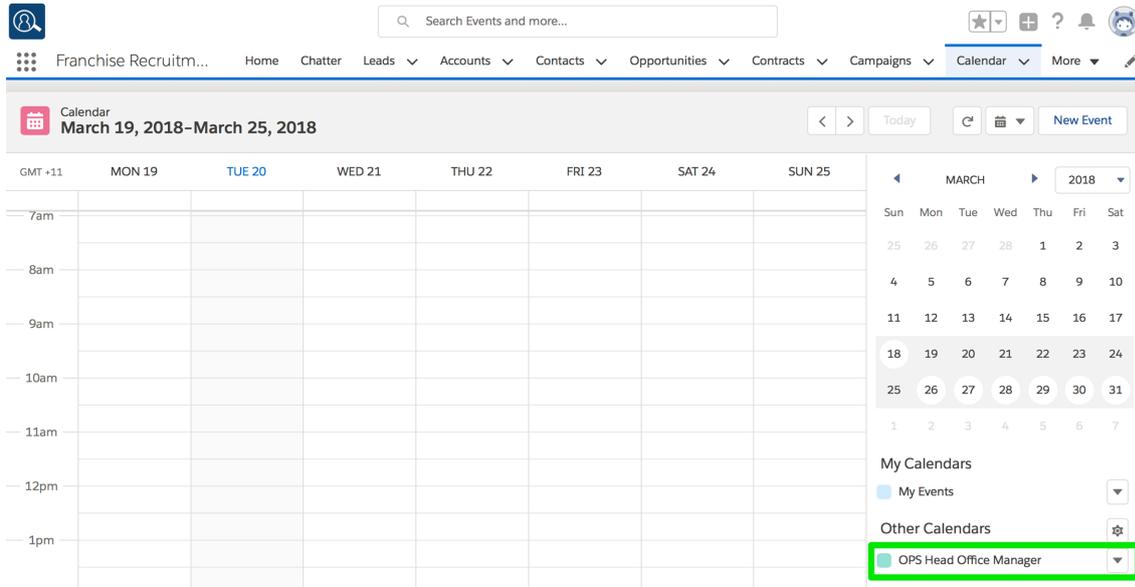
Select Person

OPS Head Office Manager

Cancel Add



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



Calendar

March 19, 2018–March 25, 2018

GMT +11 MON 19 TUE 20 WED 21 THU 22 FRI 23 SAT 24 SUN 25

7am 8am 9am 10am 11am 12pm 1pm

MARCH 2018

My Calendars

My Events

Other Calendars

OPS Head Office Manager

# 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.



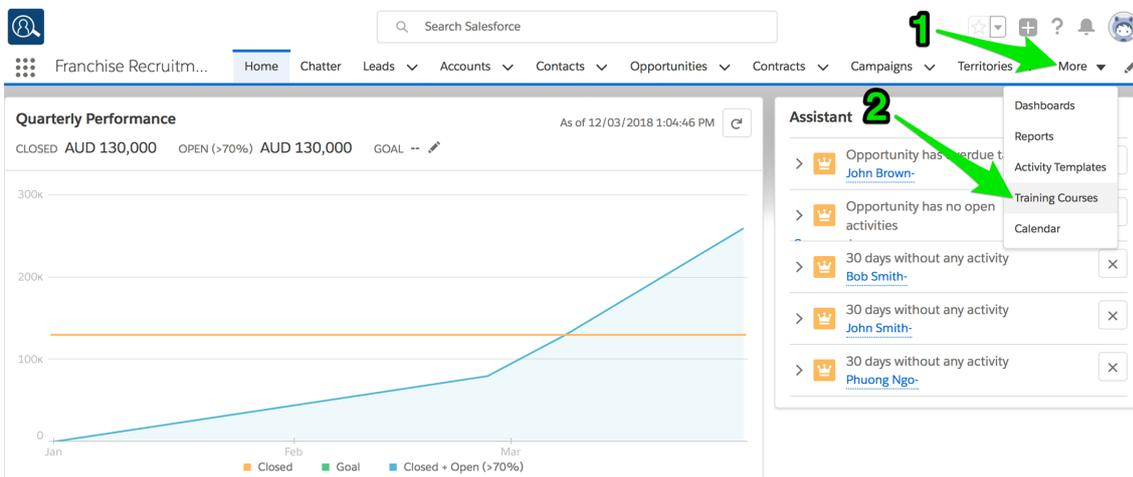
Administrator privileges are required in order to create a training course. Once a training course is created, any user can book contacts into the training course.

## 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.

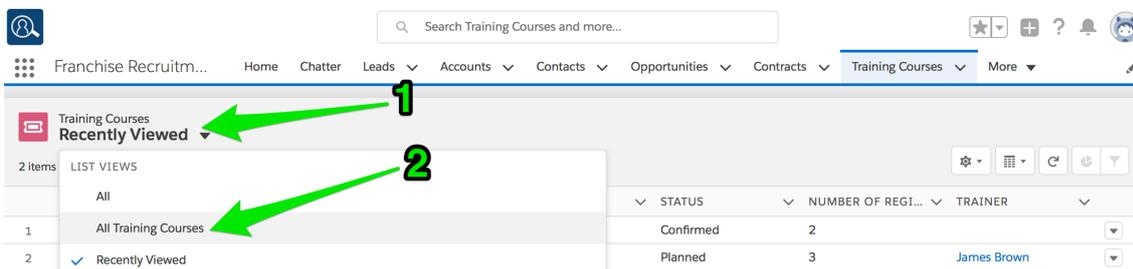
### To enroll a contact in a training course

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

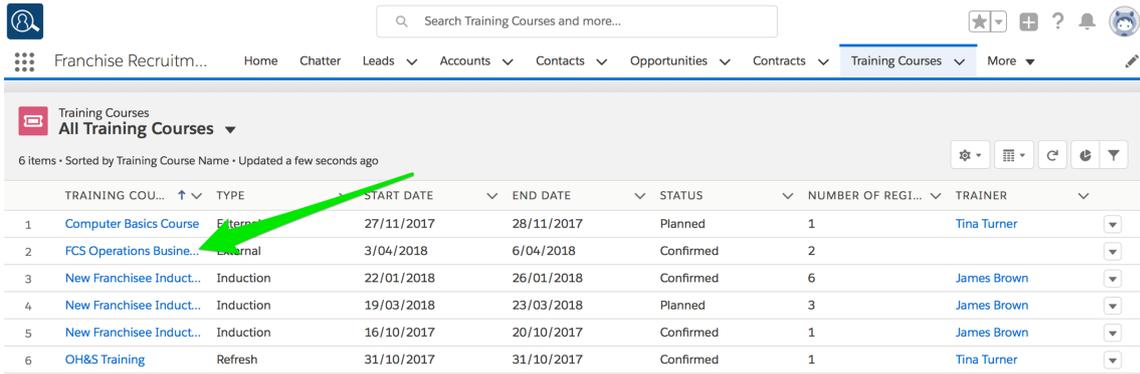


The Training Courses list appears.

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



### 3. Select the desired training course.



Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Training Courses More

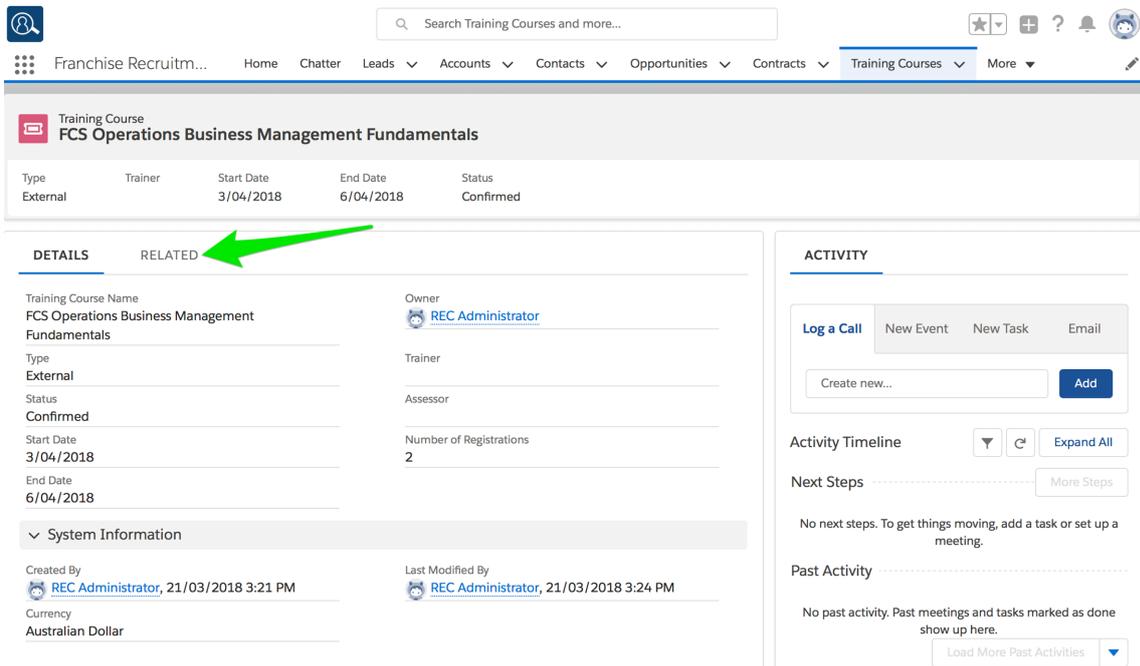
Training Courses  
All Training Courses

6 items • Sorted by Training Course Name • Updated a few seconds ago

TRAINING COU...	↑	TYPE	START DATE	END DATE	STATUS	NUMBER OF REGI...	TRAINER
1	Computer Basics Course	External	27/11/2017	28/11/2017	Planned	1	Tina Turner
2	FCS Operations Business Management Fundamentals	External	3/04/2018	6/04/2018	Confirmed	2	
3	New Franchisee Induction	Induction	22/01/2018	26/01/2018	Confirmed	6	James Brown
4	New Franchisee Induction	Induction	19/03/2018	23/03/2018	Planned	3	James Brown
5	New Franchisee Induction	Induction	16/10/2017	20/10/2017	Confirmed	1	James Brown
6	OH&S Training	Refresh	31/10/2017	31/10/2017	Confirmed	1	Tina Turner

The selected Training Course opens.

### 4. Select Related.



Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Training Courses More

Training Course  
FCS Operations Business Management Fundamentals

Type	Trainer	Start Date	End Date	Status
External		3/04/2018	6/04/2018	Confirmed

**DETAILS** RELATED

Training Course Name  
FCS Operations Business Management Fundamentals

Owner  
REC Administrator

Type  
External

Trainer

Status  
Confirmed

Assessor

Start Date  
3/04/2018

Number of Registrations  
2

End Date  
6/04/2018

System Information

Created By  
REC Administrator, 21/03/2018 3:21 PM

Last Modified By  
REC Administrator, 21/03/2018 3:24 PM

Currency  
Australian Dollar

**ACTIVITY**

Log a Call New Event New Task Email

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activity Load More Past Activities

No past activity. Past meetings and tasks marked as done show up here.

5. From the Registrations list, press New.

The screenshot shows the CRM interface for a training course. The course is 'FCS Operations Business Management Fundamentals'. Below the course details, there is a 'RELATED' section with a 'Registrations (2)' sub-section. A table lists two registrations: REG-000014 (Ames, Megan, FCS Newtown) and REG-000015 (Smith, Bob, Territory - St Ives). A green arrow points to a 'New' button in the top right of the Registrations section. To the right, there is an 'ACTIVITY' section with options like 'Log a Call', 'New Event', 'New Task', and 'Email'.

The New Registration dialog box appears.

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

The screenshot shows the 'New Registration' dialog box. It has a title bar 'New Registration'. Below is an 'Information' section. The 'Training Course' field is set to 'FCS Operations Business Management Fund...'. The 'Contact' field has a search box 'Search Contacts...' and a list of contacts: Bob Smith (Territory - St Ives), Megan Ames (FCS Newtown), Jimmy Knowles, Douglas Mitchell (Territory (D) - Bondi), and Cameron Jones (Territory - Bega). There is also a 'New Contact' option. To the right, there are checkboxes for 'IT Equipment Required', 'Assessment Required', and 'Assessment Complete'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons. A green arrow points to the 'Search Contacts...' field, and another green arrow points to the 'Douglas Mitchell' contact. The number '1' is next to the Training Course field, and the number '2' is next to the Search Contacts field.

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

New Registration

---

**Information**

\* Training Course Registration Number

FCS Operations Business Management Fund... x

\* Contact

Douglas Mitchell x

Registration Form Complete  IT Equipment Required

Registration Complete  Assessment Required

Fees Paid  Assessment Complete

**System Information**

Currency

Australian Dollar

[Cancel](#) [Save & New](#) [Save](#)

The contact is now registered for the course.

Search Training Courses and more...

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Training Courses More

**Training Course**  
FCS Operations Business Management Fundamentals

Type	Trainer	Start Date	End Date	Status
External		3/04/2018	6/04/2018	Confirmed

**REGISTRATIONS (3)**

REGISTRATION: REGIST...	LAST NAME	FIRST NAME	ACCOUNT NAME
REG-000014	Ames	Megan	FCS Newtown
REG-000015	Smith	Bob	Territory - St Ives
REG-000016	Mitchell	Douglas	Territory (D) - Bondi

[View All](#)

**ACTIVITY**

Log a Call New Event New Task Email

Create new... [Add](#)

Activity Timeline [Expand All](#)

Next Steps [More Steps](#)

No next steps. To get things moving, add a task or set up a

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

# CHAPTER 8

## Customer Communications

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# Working with prospects on the phone

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



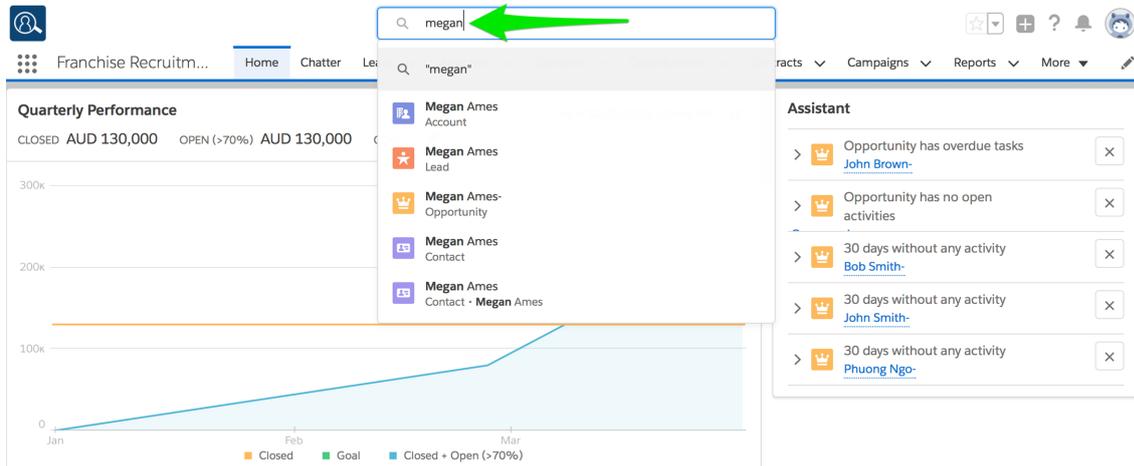
When recording new leads over the phone, See “Manually created leads” on page 48.

## How to locate the right record

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

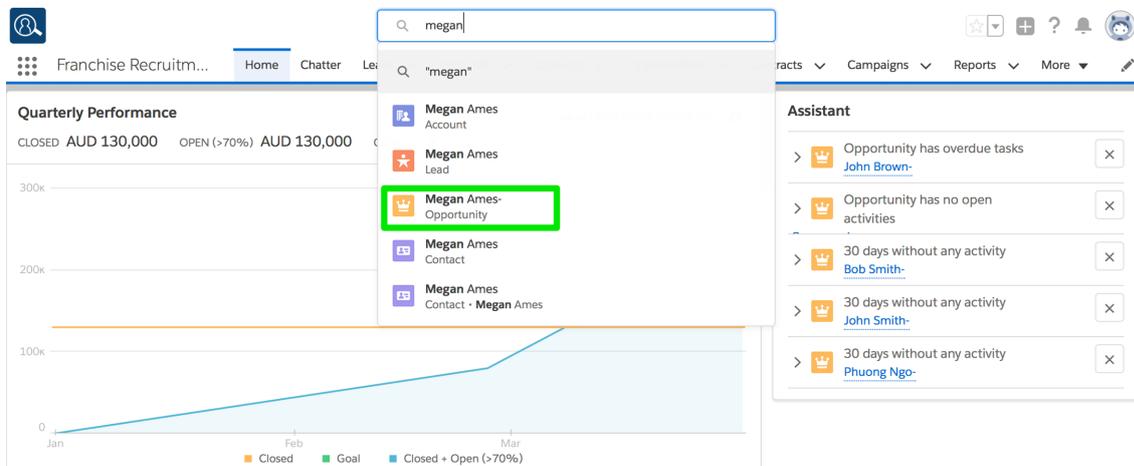
### To locate a person's record

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



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.

Opportunity  
**Megan Ames-**

Account Name: [Megan Ames](#) | Close Date: 8/03/2018 | Amount: \$50,000.00 | Opportunity Owner: [REC Sales Manager](#)

Stage: Closed - Sold

Probability (%): 100%

Contract: [00000208](#) | Amount: \$50,000.00

Description: [Google Search](#)

Activity Log: Log a Call, New 1:1 Meeting, New Task, Email

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

Opportunity  
**Mr. Alexander Ivanov-**

Account Name: [Alexander Ivanov](#) | Close Date: 31/03/2018 | Amount: | Opportunity Owner: [REC Sales Manager](#)

Stage: One on One Meeting

Probability (%): 30%

Contract: [00000212](#) | Amount: | Primary Campaign Source: [Google Search](#)

Activity Log: Log a Call, New 1:1 Meeting, New Task, Email

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

The screenshot shows a CRM dashboard for 'Franchise Recruitm...'. At the top, there are navigation tabs for 'Home', 'Chatter', and 'Leads'. A search bar at the top center contains the text 'andreas', and a dropdown menu below it shows a search result for 'Andreas Fotos' with the role 'Lead', which is highlighted with a green rectangular box. To the left, a 'Quarterly Performance' chart displays sales data for January, February, and March. The chart includes a blue line for 'Closed + Open (>70%)', an orange horizontal line for 'Goal', and a green horizontal line for 'Closed'. The y-axis ranges from 0 to 300k. To the right, an 'Assistant' panel lists several alerts, such as 'New lead assigned to you today' for 'Andreas Fotos' and '30 days without any activity' for several other users.

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.



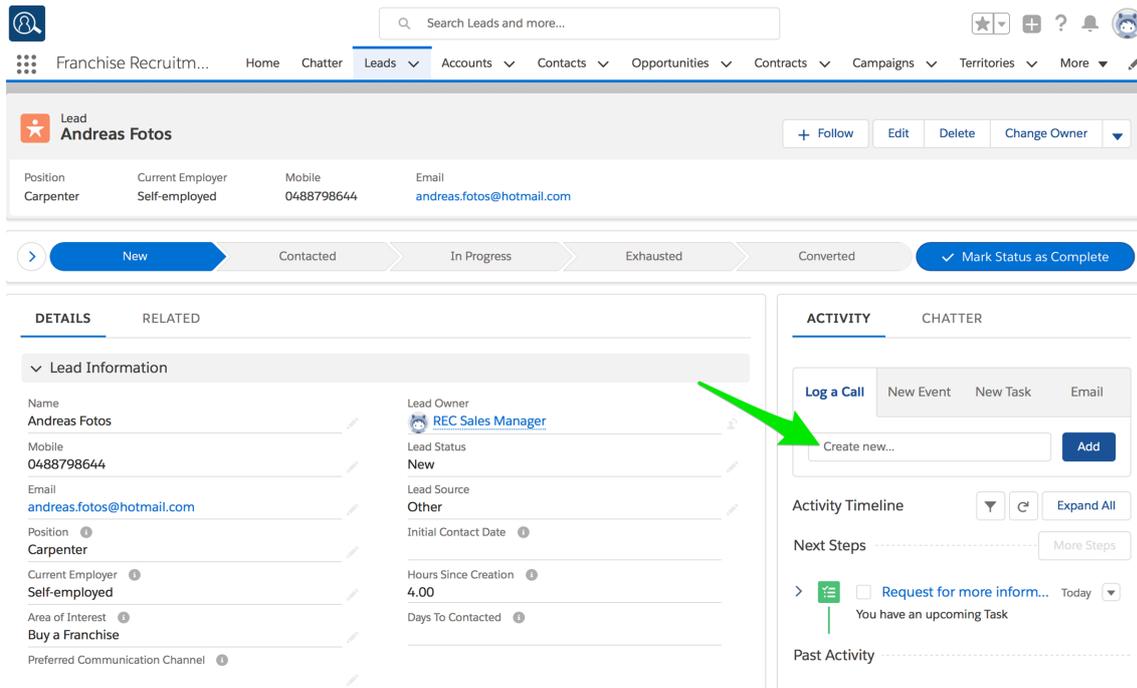
To enter new customers, See "Manually created leads" on page 48.

# 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 screenshot shows the CRM interface for lead 'Andreas Fotos'. The 'Log a Call' form is open, with the following details:

- Lead Information:** Name: Andreas Fotos, Mobile: 0488798644, Email: andreas.fotos@hotmail.com, Position: Carpenter, Current Employer: Self-employed, Area of Interest: Buy a Franchise.
- Lead Owner:** REC Sales Manager
- Lead Status:** New
- Lead Source:** Other
- Hours Since Creation:** 4.00

The 'Log a Call' form fields are:

- Subject:** Returned your call (highlighted in green)
- Comments:** Yes tomorrow is fine. (highlighted in green)
- Name:** Andreas Fotos

A green arrow points to the **Save** button. The 'Activity Timeline' section is visible below the form.

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

The screenshot shows the CRM interface for lead 'Andreas Fotos' after the call has been saved. The 'Log a Call' form is now closed, and the 'Returned your call' activity is visible in the 'Past Activity' section of the 'Activity Timeline'.

The 'Activity Timeline' section shows:

- Next Steps:** No next steps. To get things moving, add a task or set up a meeting.
- Past Activity:** Returned your call (highlighted in green), Today, You logged a call.

## 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 screenshot shows the Salesforce interface for an Opportunity record. The top navigation bar includes 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Contracts', 'Campaigns', 'Territories', and 'More'. The Opportunity record for 'Mr. Alexander Ivanov' is displayed, with fields for 'Account Name', 'Close Date', 'Amount', and 'Opportunity Owner'. The 'Activity' pane is open, and the 'Email' tab is selected, indicated by a green arrow. The 'Email' tab shows a 'Log a Call' button and a 'New 1:1 Meeting' button. The 'Subject' field is set to 'Call' and the 'Comments' field is empty. The 'Name' field is set to 'Mr. Alexander Ivanov' and the 'Save' button is visible.

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.

The screenshot shows the Salesforce Franchise Recruitment interface. At the top, there is a search bar and navigation tabs including Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, and Territories. The main header displays the opportunity name "Mr. Alexander Ivanov" with buttons for "+ Follow", "1:1 Meeting", "Set Price Book", and "Add Product". Below this, a summary row shows "Account Name: Alexander Ivanov", "Close Date: 31/03/2018", and "Opportunity Owner: REC Sales Manager". A progress bar at the bottom of the header shows stages: "One on One Meeting" (selected), "Reviewing Inf...", "Territory Reser...", "Sourcing Fina...", "Offer to Purch...", "Long Term Pro...", and "Closed".

The "DETAILS" section on the left lists fields for Opportunity Owner, Name, Contract, and Description. A context menu is open over the account name "Alexander Ivanov", showing options: "Copy Email Address" (highlighted with a green arrow labeled '1'), "Share", "Inspect Element", and "Services". Below the menu, a list of "Opportunities (1)" is shown, with details for "Mr. Alexander Ivanov-": Stage: "One on One Meeting", Amount, and Close Date: "31/03/2018".

The "ACTIVITY" section on the right shows an email composition window. The "From" field is populated with "REC Sales Manager <dean.llewellyn@f...>". The "To" field is empty, with a green arrow labeled '2' pointing to it from the "Copy Email Address" option in the context menu. Other fields include "Cc", "Bcc" (with a suggested email address), and "Subject".

#### 4. Complete Subject and Details then press Send.

The screenshot displays the Salesforce CRM interface for an opportunity. The top navigation bar includes a search bar and various menu items like Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, Territories, and More. The main header shows the opportunity name "Mr. Alexander Ivanov" and a "1:1 Meeting" stage. Below this, a progress bar indicates the current stage is "One on One Meeting".

The left sidebar is divided into "DETAILS" and "RELATED" sections. The "DETAILS" section includes fields for Opportunity Owner (REC Sales Manager), Opportunity Name (Mr. Alexander Ivanov), Account Name (Alexander Ivanov), Contract (00000212), and Description. It also features sections for "1:1 Meeting" (with preferred dates and times), "Demonstration Day Information" (with demonstration day and franchise details), "1:1 Meeting Follow Up Emails" (with checkboxes for various email types), and "Timeline Information".

The right sidebar is divided into "ACTIVITY" and "CHATTER" sections. The "ACTIVITY" section shows an email composition window. The "From" field is "REC Sales Manager <dean.llewellyn@f...>". The "To" field is "Alexander Ivanov". The "Subject" field is "Additional meeting times". The email body contains the text: "Hi Alexander", "Just checked my schedule, I'm also available on the 15th and the 18th all day and evening. Is that of interest?", and "Yours, Dean". A green box highlights the subject and body text. A green arrow points to the "Send" button at the bottom right of the email composition window.

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

The screenshot shows the Salesforce interface for an Opportunity record. The record is for 'Mr. Alexander Ivanov' with a close date of 31/03/2018. The 'Past Activity' section shows a list of activities, with the most recent one being an email sent to Alexander Ivanov at 3:37 PM today. This email activity is highlighted with a green box.



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

The screenshot shows the 'Email' activity creation form in Salesforce. The 'From' field is set to 'REC Sales Manager <mike@franchisec...>'. The 'To' field is empty. The 'Related To' field is set to 'Alexander Ivanov'. The 'Send' button is visible, and the 'Email' icon in the activity toolbar is highlighted with a green box.

## 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.

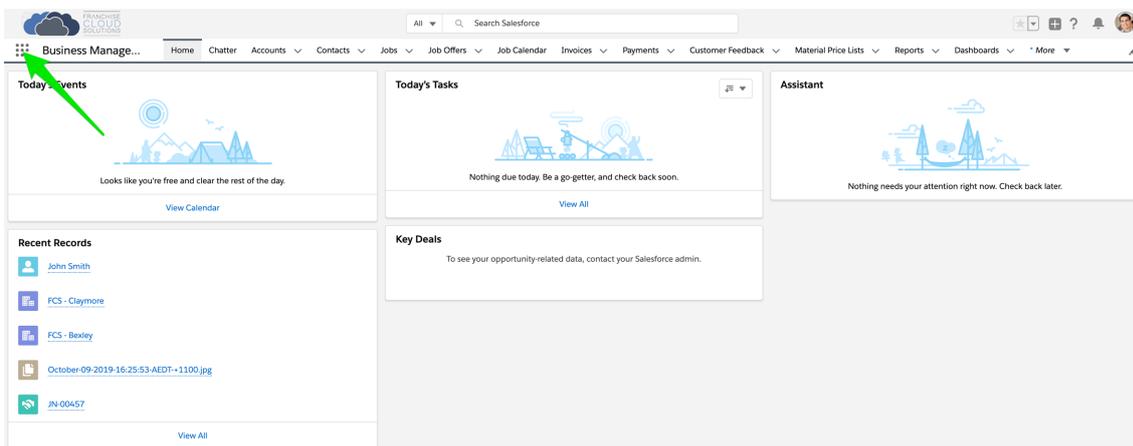
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.

## How to review email template headers and footers

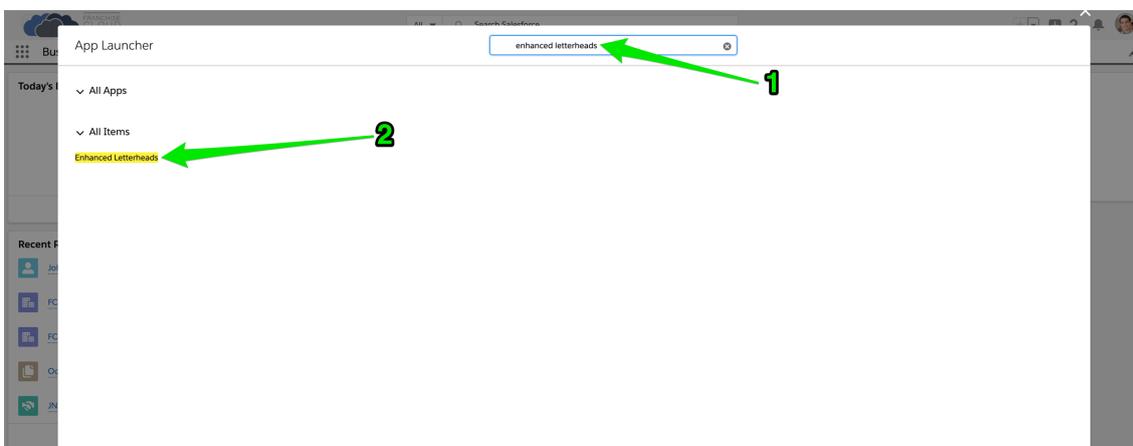
Most likely your franchisor will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

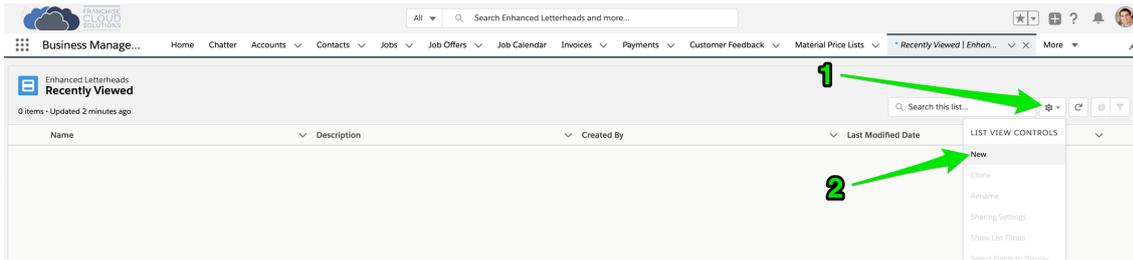
1. Open the App Launcher.



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**.

New List View

\*List Name

All

Who sees this list view?

Only I can see this list view

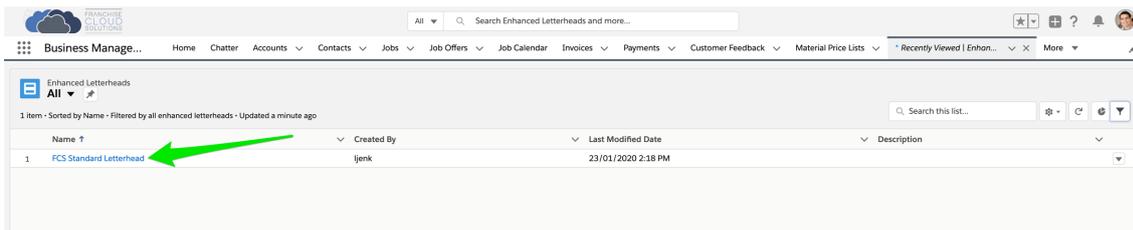
All users can see this list view ⓘ

Share list view with groups of users ⓘ

Cancel Save

The form is titled 'New List View'. It has a text input field for the list name, which contains the text 'All'. Below the input field are three radio button options for visibility: 'Only I can see this list view' (selected), 'All users can see this list view', and 'Share list view with groups of users'. At the bottom right are 'Cancel' and 'Save' buttons. Green arrows labeled '1' and '2' point to the list name input and the 'Save' button respectively.

5. Now select the **Standard Letterhead**.



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

Enhanced Letterhead  
**FCS Standard Letterhead**

Description

**Details**

Information

Name: FCS Standard Letterhead  
Description:

Letterhead Content

Header



Footer  
{{{Sender.Email\_Signature\_0}}}

System Information

Created By: Loryn Jenkins, 23/01/2020 2:18 PM  
Last Modified By: Loryn Jenkins, 23/01/2020 2:18 PM

Enhanced Letterhead  
**FCS Standard Letterhead**

Description

**Details**

Information

Name: FCS Standard Letterhead  
Description:

Letterhead Content

Header



Footer  
{{{Sender.Signature\_0}}}

System Information

Created By: Loryn Jenkins, 23/01/2020 2:18 PM  
Last Modified By: Loryn Jenkins, 25/03/2020 4:46 PM



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.

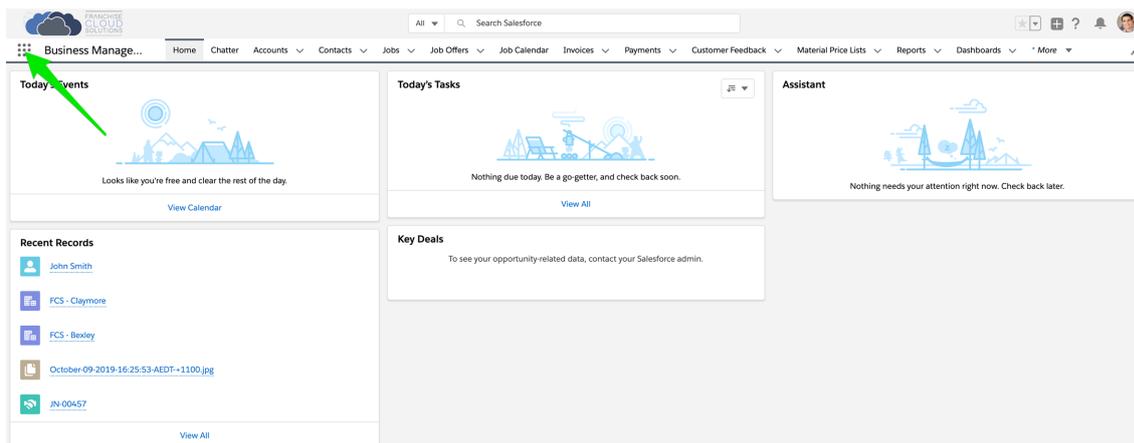


Email templates that are frequently created by our clients include

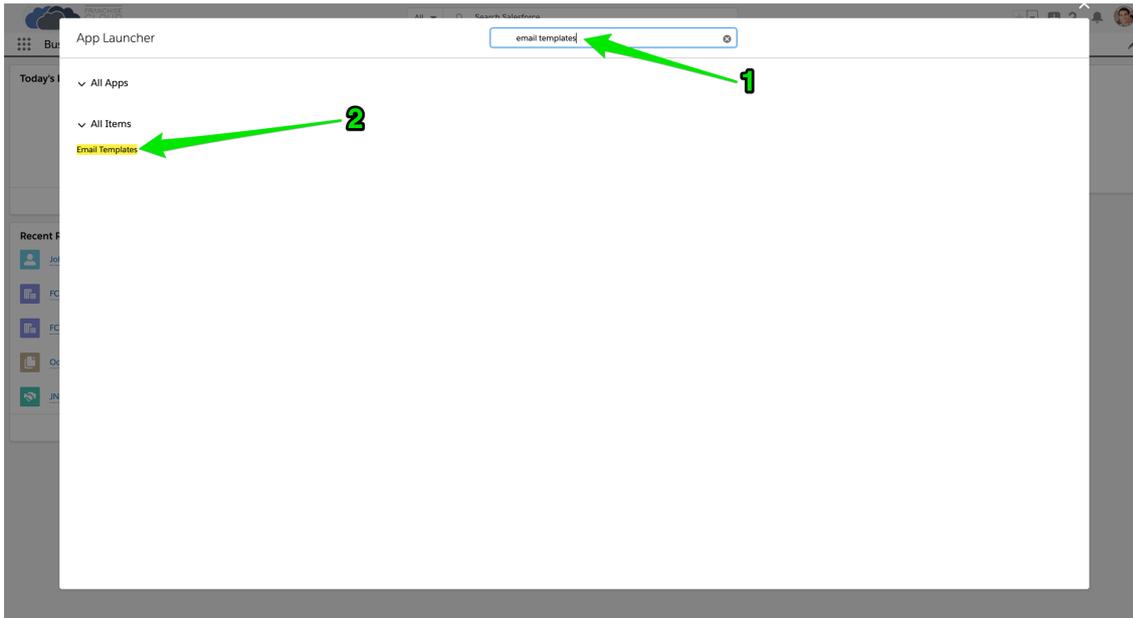
- » New customer initial contact
- » Returning customer initial contact
- » New Quote Job request
- » New Do & Charge Job request
- » Scheduled appointment notification
- » Quote email
- » Invoice email
- » Invoice overdue

## To create a custom email template

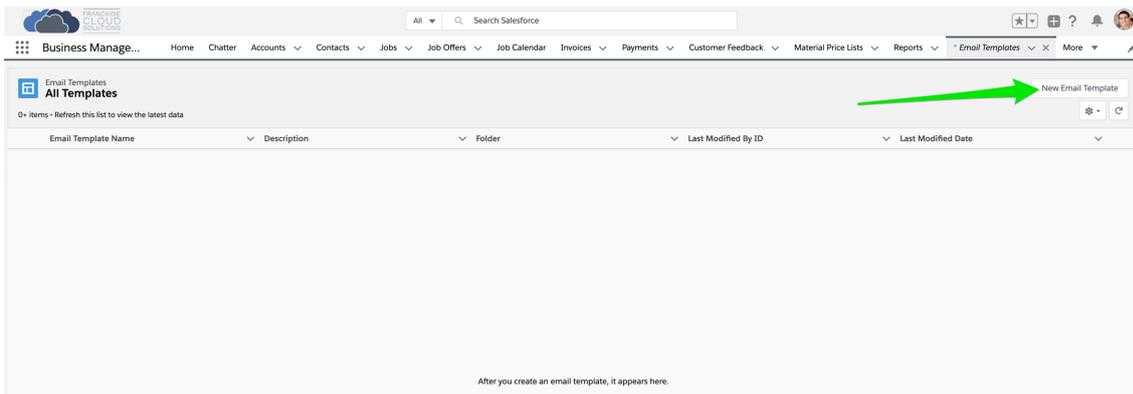
1. Open the App Launcher.



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.

New Email Template

**Information**

\* Email Template Name  

Related Entity Type

Description

Folder

**Message Content**

Subject

Enhanced Letterhead

HTML Value

Source Font Size **B** *I* U **A**               



**Additional Information**

Created By

Last Modified By

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

New Email Template

**Information**

\*Email Template Name

Description

**Message Content**

Subject

HTML Value

Source Font Size **B** *I* U A- [List Icons]

**Related Entity Type**

-- None --

Catalog Profile

Check-In

Contact

Course

Customer Feedback

DocuSign Recipient Status

DocuSign Status

Instructor

Invoice

**Job**

Job Offer

**Additional Information**

Created By Last Modified By

## 6. Enter an email subject line.

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

**Additional Information**

Created By: \_\_\_\_\_ Last Modified By: \_\_\_\_\_

## 7. Select an appropriate letterhead.

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

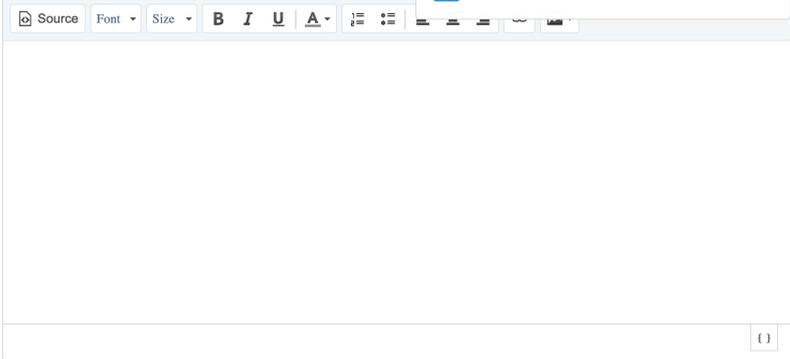
Description:  Folder:

**Message Content**

Subject:

Enhanced Letterhead:  

HTML Value:

Source Font Size **B** *I* U **A** 

**Additional Information**

Created By: Last Modified By:



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

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

New Email Template

**Information**

\* Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

Source Font Size **B** *I* U A

Dear ,

Please find attached your quote for job .

Feel free to contact me if you have any queries or need further information about the work.

Thank you,|

**Additional Information**

Created By: Last Modified By:

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

New Email Template

**Information**

*Email Template Name My Quote Email Template	Related Entity Type Job
Description	Folder Private Email Templates

**Message Content**

Subject FCS Invoice - {{{FCS_OPS__Job__c.Name}}}	Enhanced Letterhead FCS Standard Letterhead
---	--

HTML Value

Dear ,

Please find attached your quote for job .

Feel free to contact me if you have any queries or need further information about the work.

Thank you,

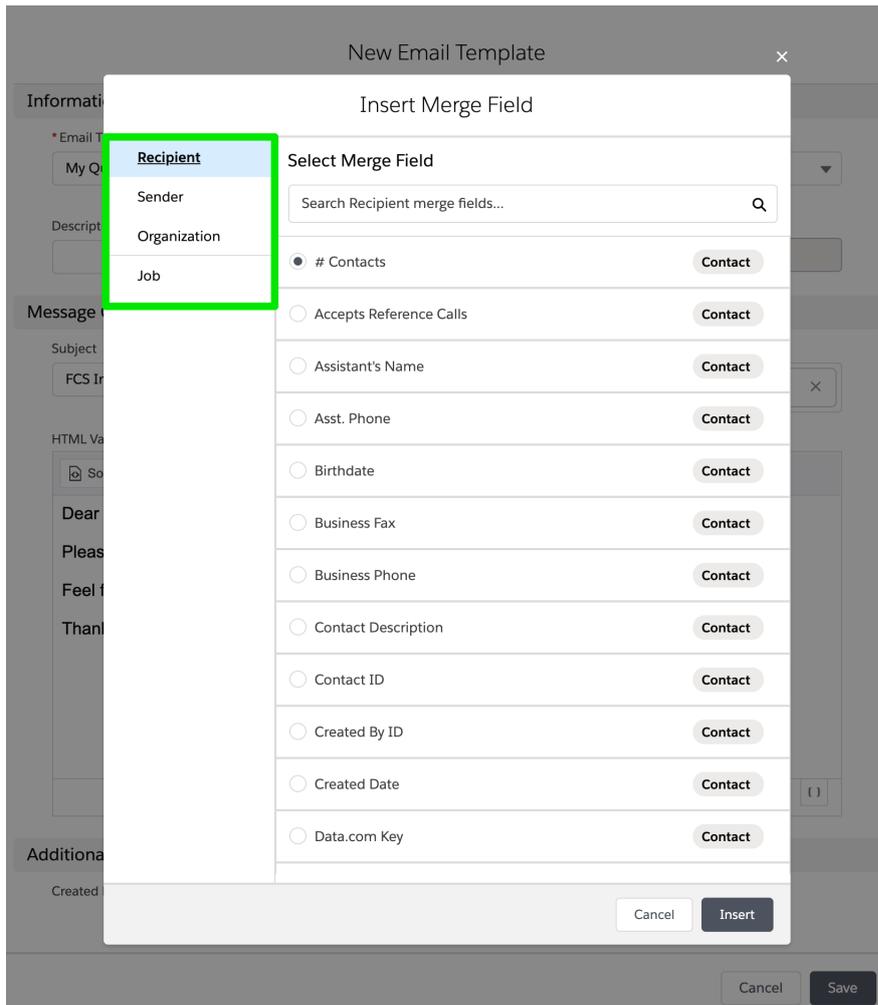


**Additional Information**

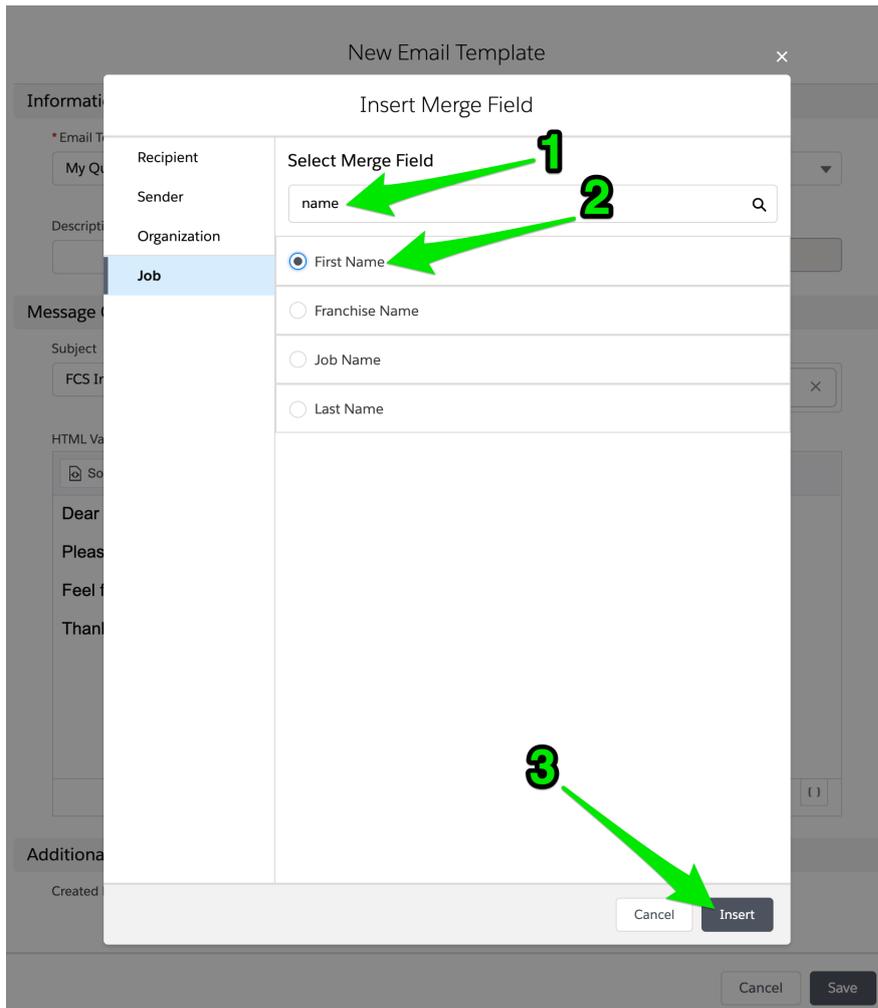
Created By	Last Modified By
------------	------------------

Cancel Save

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.

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

Dear {{{FCS\_OPS\_\_Job\_\_c.FCS\_OPS\_\_First\_Name\_\_c}}},  
Please find attached your quote for job {{{FCS\_OPS\_\_Job\_\_c.Name}}}. |  
Feel free to contact me if you have any queries or need further information about the work.  
Thank you,

**Additional Information**

Created By: Last Modified By:



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

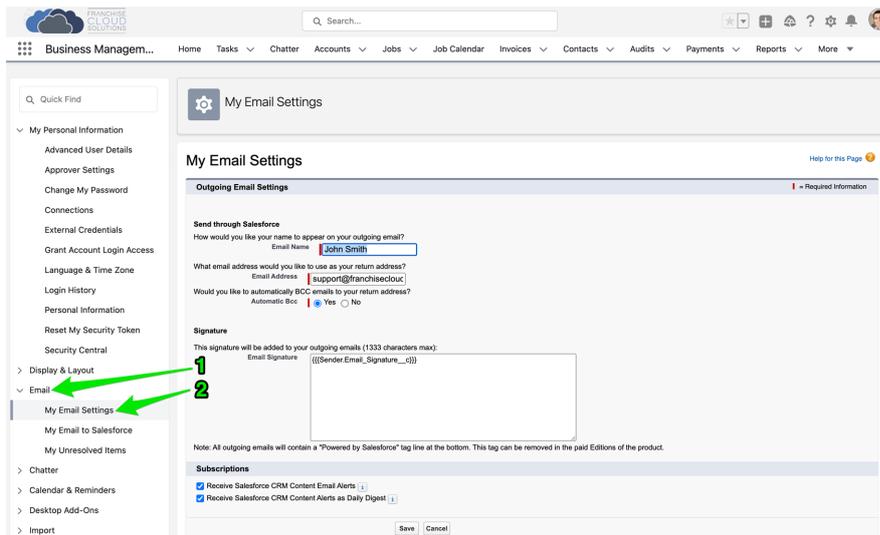
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

### To blind copy all emails to your email address

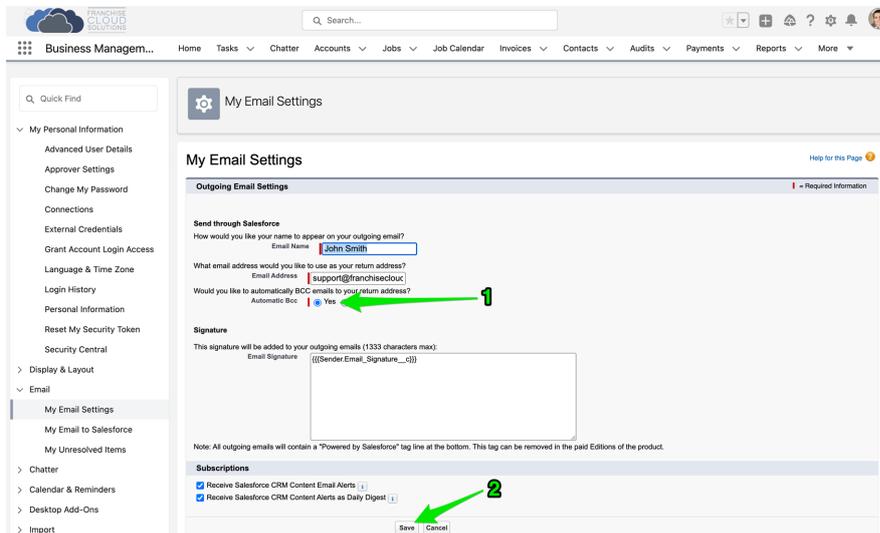
1. Go to **View Profile** and choose **Settings**.

The screenshot displays the Salesforce JobCalendar interface. At the top, there is a search bar and a navigation menu. The main content area is divided into a search results list on the left and a calendar grid on the right. The search results list shows job listings with details like 'JN-00619' and 'JN-00464'. The calendar grid shows dates from Sunday 6/11 to Thursday 10/11, with a time slot from 7am to 10am. On the right side, there is a user profile sidebar for John Smith, with a green arrow pointing to the 'Settings' link. The sidebar also shows user information and options like 'Switch to Salesforce Classic'.

## 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

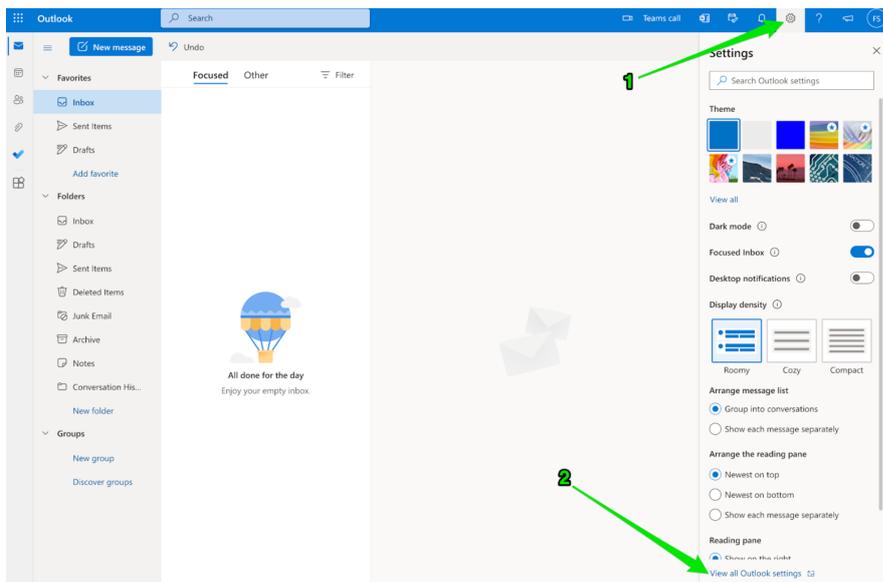
The Salesforce extension for Office 365 provides you control as to

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

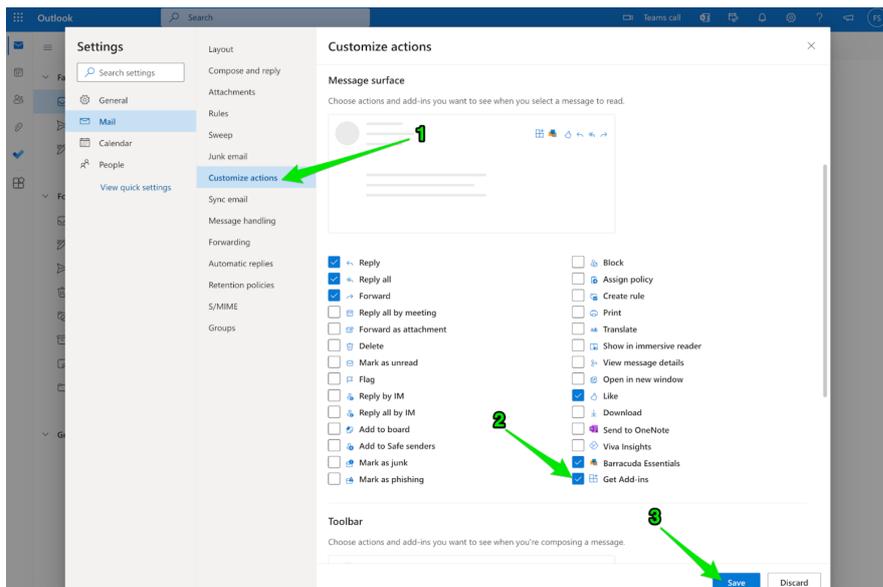
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

## To install the Salesforce extension for Office 365

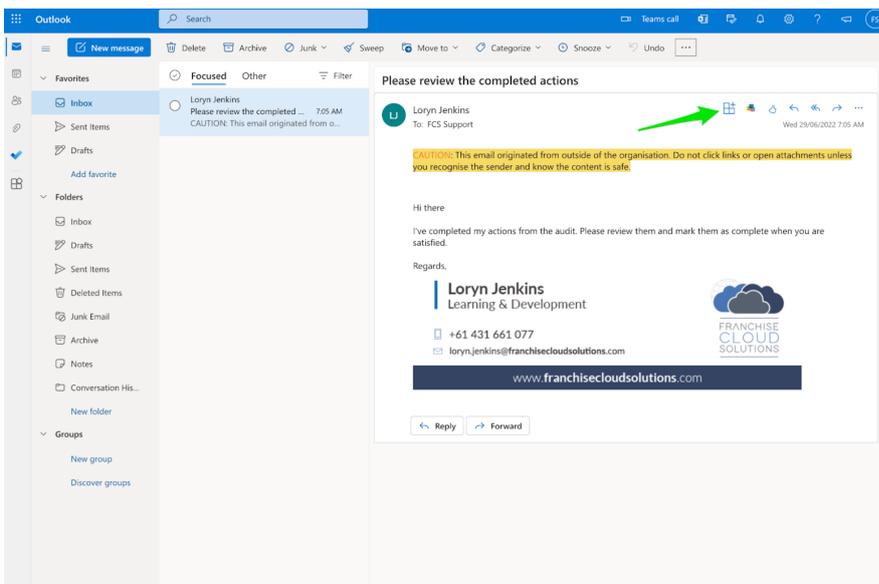
1. From Outlook 365, select the **Settings** menu and choose to **View all Outlook Settings**.



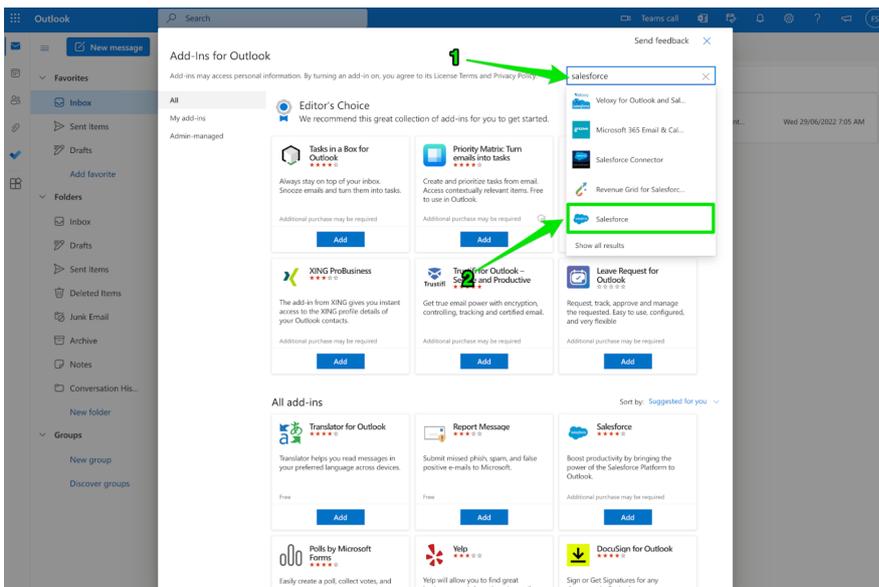
2. Choose **Customize Actions**, scroll to the section named **Message Surface**. Check **Get Add-ins** and press **Save**.



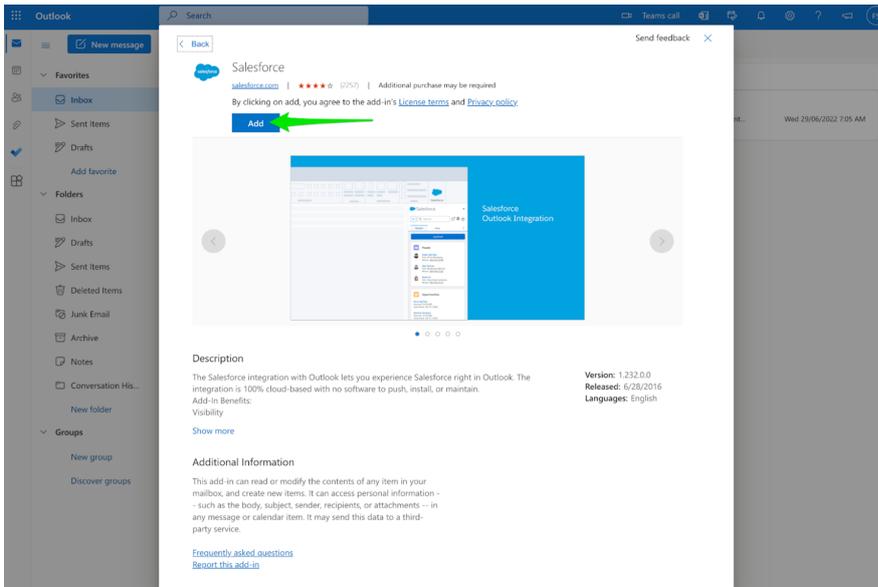
3. Within any message, click the **Get Add-ins** button.



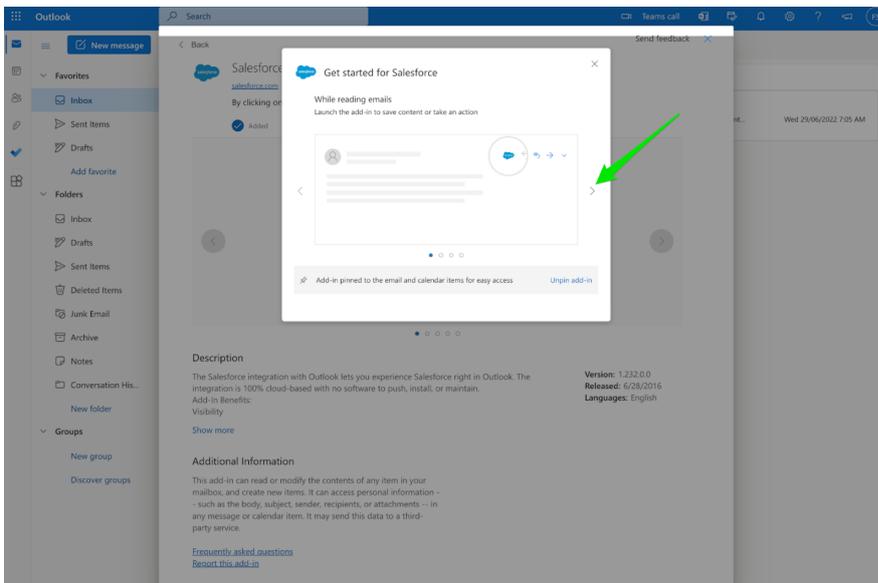
4. Within the Add-ins for Outlook box, search for *Salesforce*. A number of different salesforce add-ins will appear. Select the one shown in the following image or choose **Show all results**.



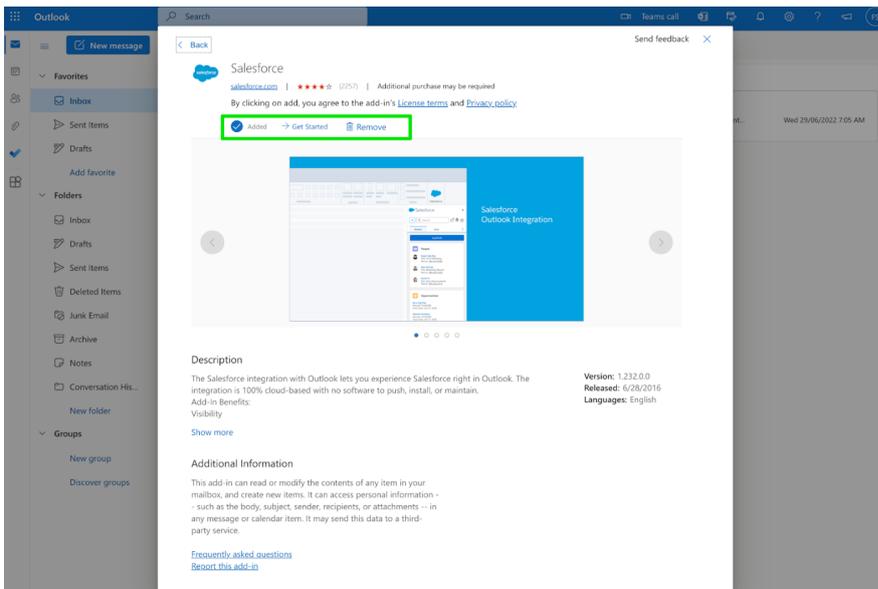
5. From the **Salesforce Connector** page, press the **Add** button.



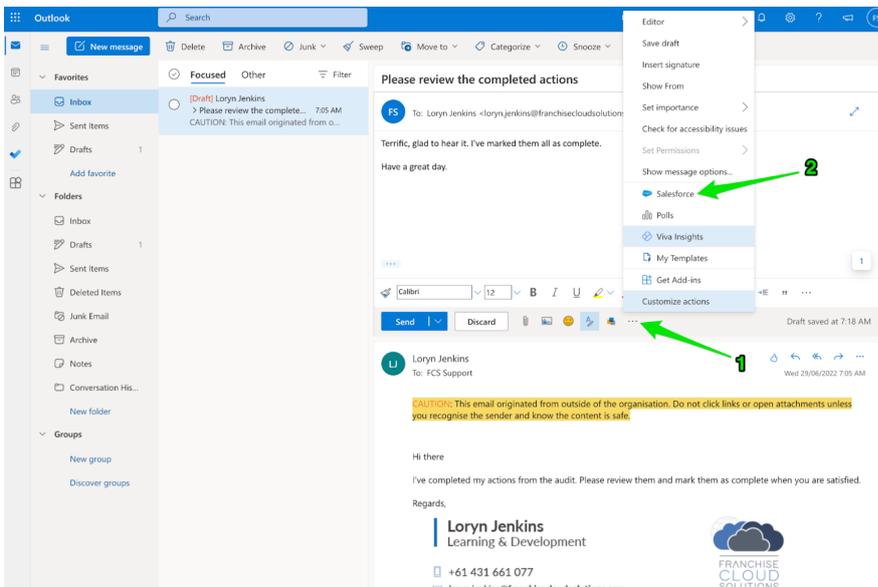
6. We recommend you browse through each of the instructions in the **Get started for Salesforce box**, so you know where to find it and how to use it.



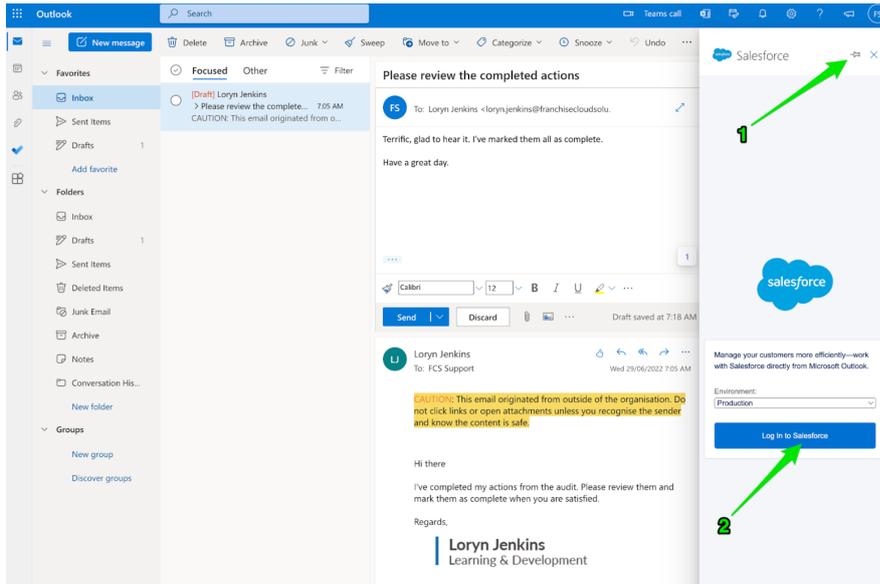
7. Dismiss the **Get started for Salesforce** box and note that the add-in has been added.



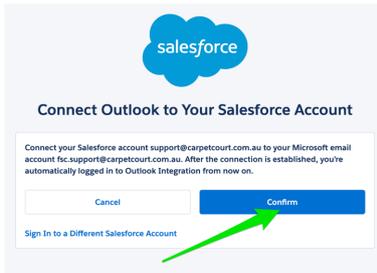
8. Now when you're in any message you're composing, on the **Send** bar, press the ... button to reveal the menu. Select the **Salesforce** add-in.



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

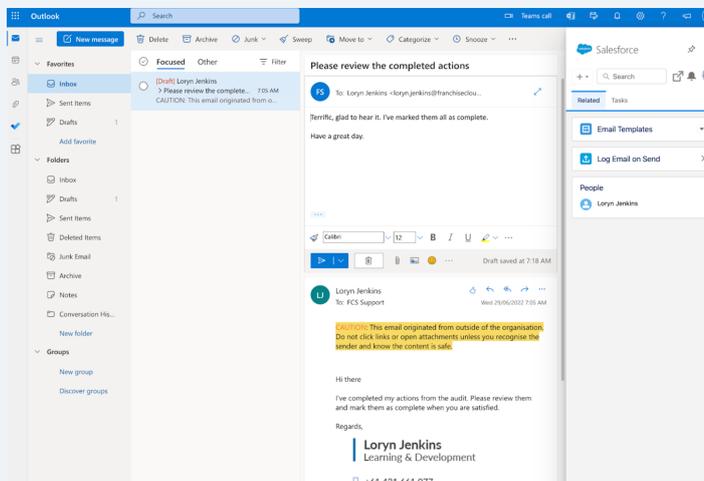


- At the login prompt, enter your Salesforce Username and Password. Once logged in, ensure you **Allow** the connection between **Outlook** and your **Salesforce** account.



## 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

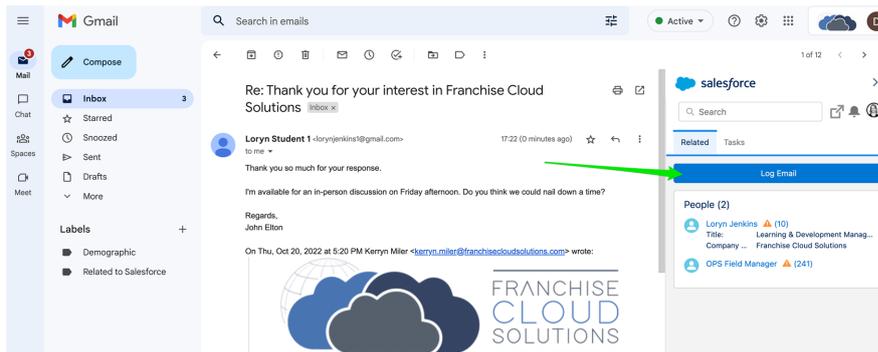
When you open an email with the Salesforce extension open, the Salesforce extension presents you with the opportunity to log the email into Salesforce against one or more records. By default, you can log the email against a person (**Contact** or **Lead**) and against another object (typically **Opportunity**, 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.



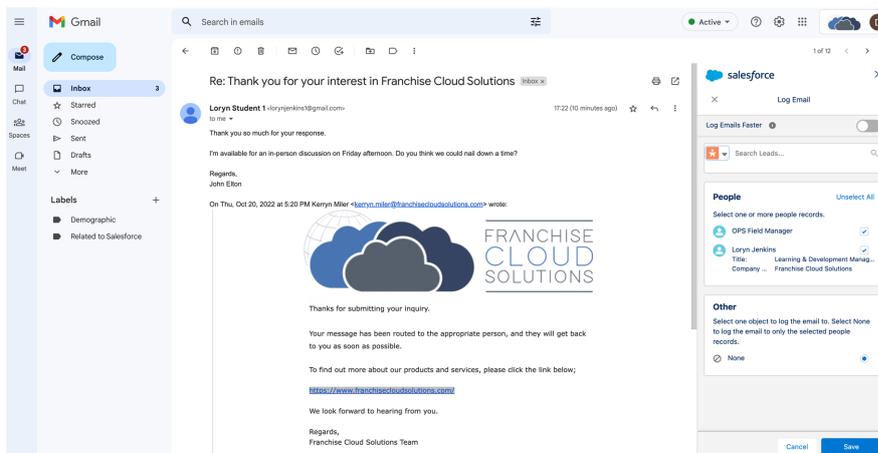
All screen shots below show the Chrome extension. The extension for Office 365 is used similarly.

## To log an email against a person

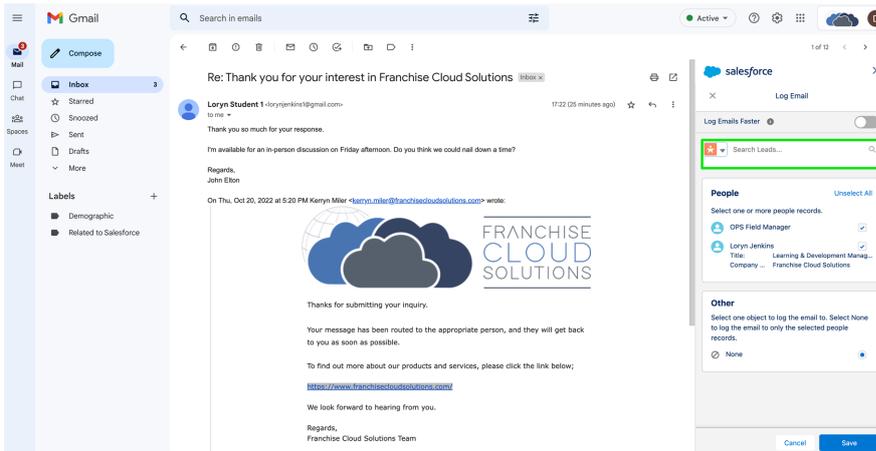
1. With your email open and the Salesforce pane opened, select the **Log Email** button.



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.

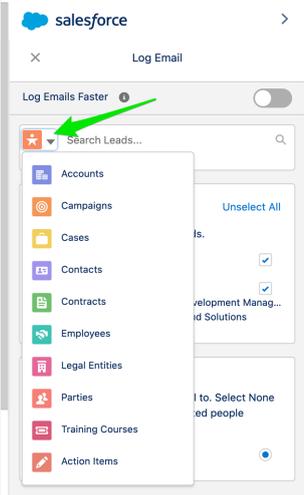


3. If you need to add more people to the list, you can search to find other people or other records. Enter your search term in the search box, and choose from the records appearing in the drop-down list.

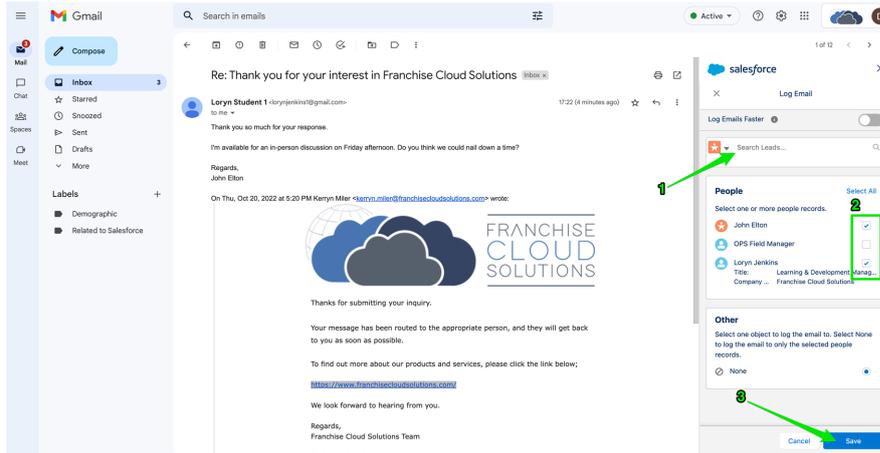


 **Hint**

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

A screenshot of the "Log Email" sidebar from the previous image. A green arrow points to a dropdown menu that is open, showing a list of record types: Accounts, Campaigns, Cases, Contacts, Contracts, Employees, Legal Entities, Parties, Training Courses, and Action Items. The "Search Leads..." option is highlighted at the top of the dropdown.

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

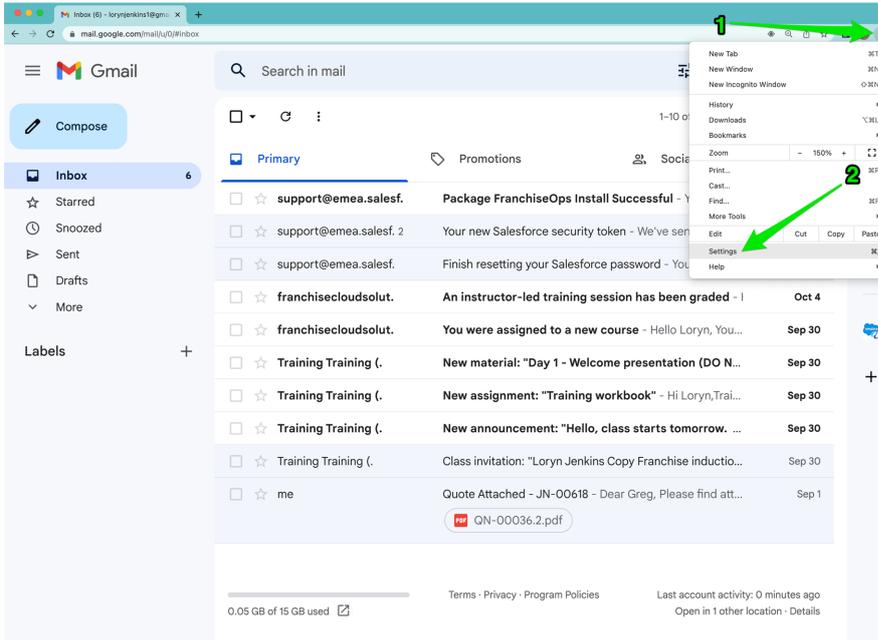
The Salesforce rextension for Chrome provides you control as to

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

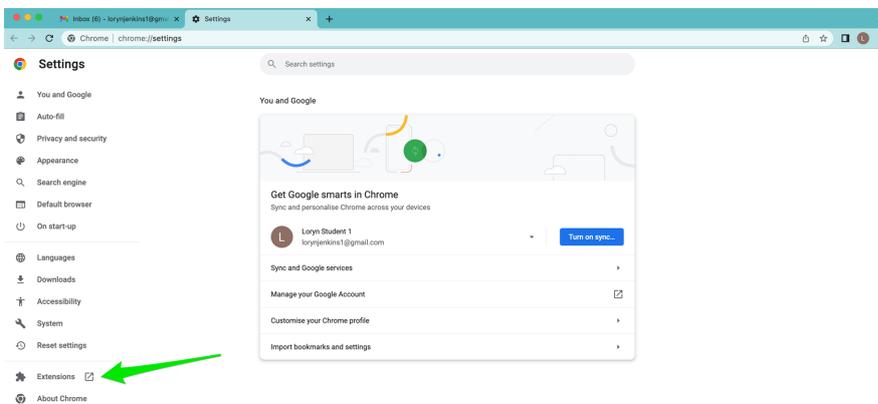
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

## To install the Salesforce extension for GSuite

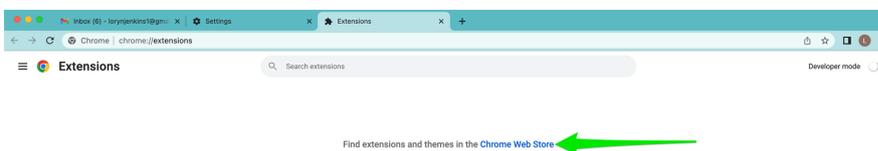
1. Using the **Chrome** browser, open **GMail**. Select the **Customize** menu, and choose **Settings**.



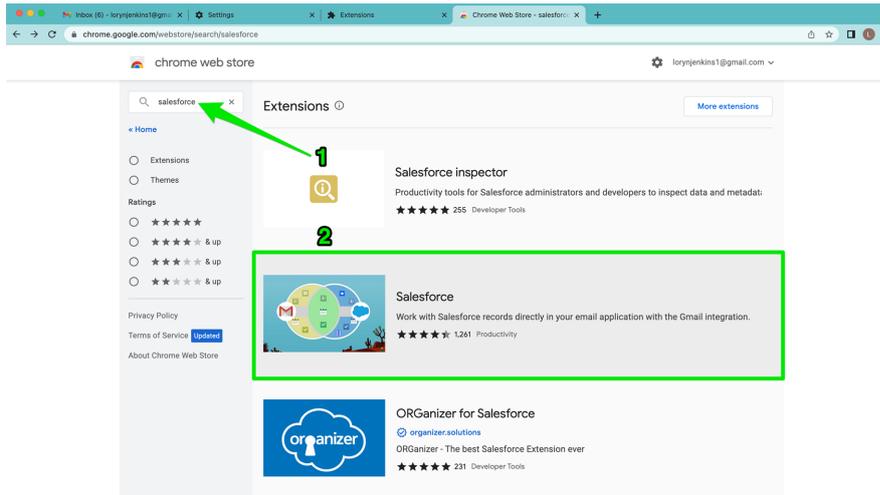
2. Chrome opens a tab in which it displays the **Settings** menu. Select the **Extensions** link.



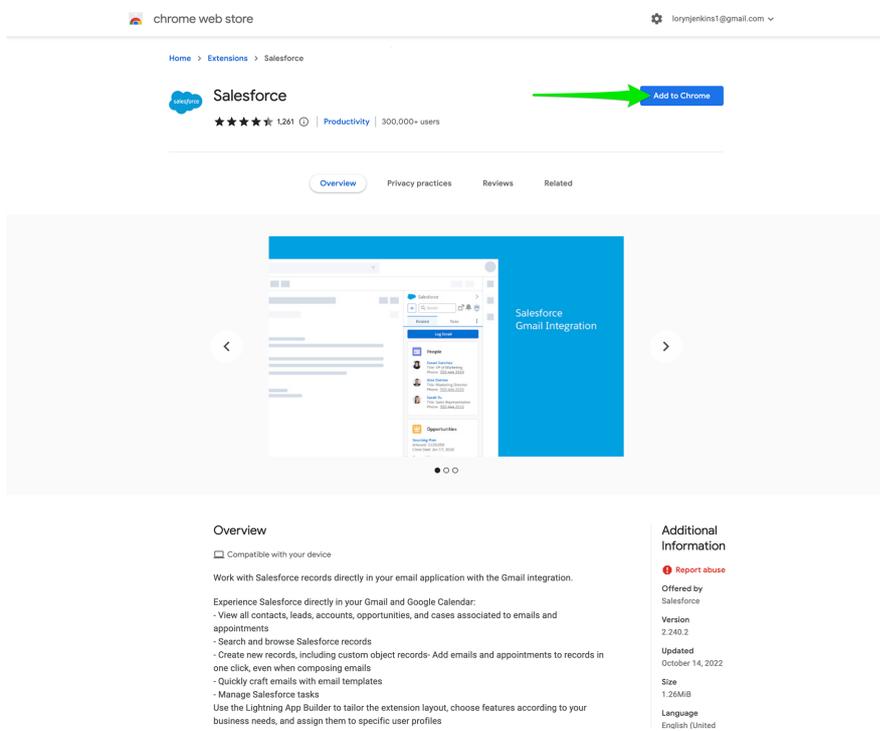
3. **Extensions** opens in yet another tab. Select the link to the **Chrome Web Store**.



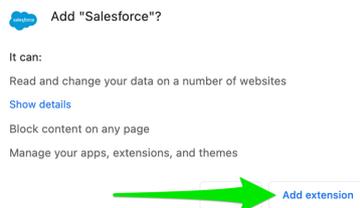
4. A fourth tab opens and displays the **Chrome Web Store**. In the search box, search for *Salesforce*. Select the **Salesforce** extension.



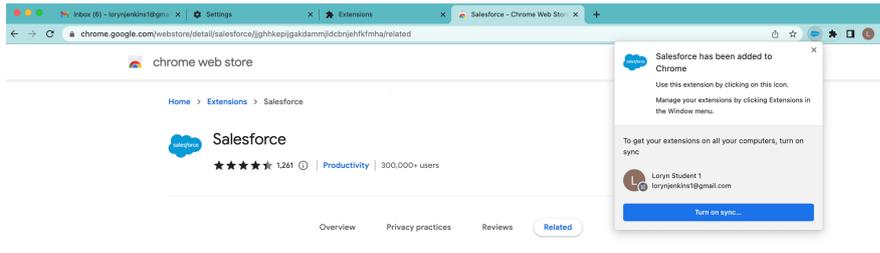
5. From the **Salesforce** entry, select the **Add to Chrome** button.



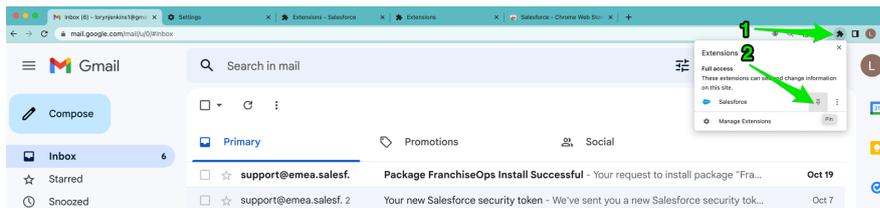
6. From the Add **"Salesforce"** box, select **Add Extension**.



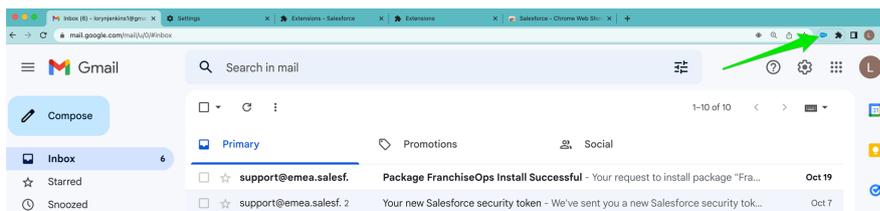
7. Salesforce adds the extension to Chrome then provides a popup to confirm that the extension has been added.



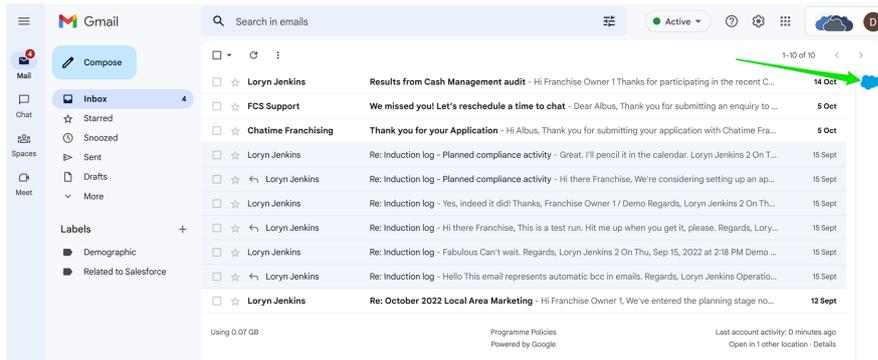
8. Now go back to the tab containing Gmail and click on the Extensions  button, then click the Pin button beside the Salesforce label.



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.

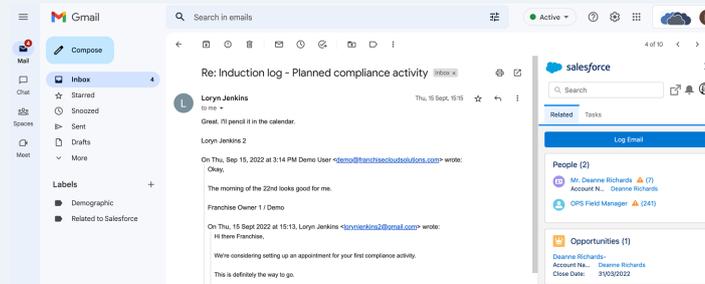


10. The Salesforce extension for Chrome now appears in the sidebar of your web browser. Click on the Salesforce cloud icon to expand the sidebar.



## 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.

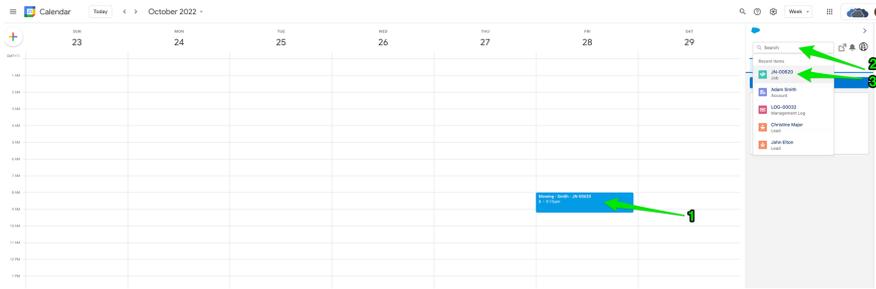


## Logging events using Salesforce extensions

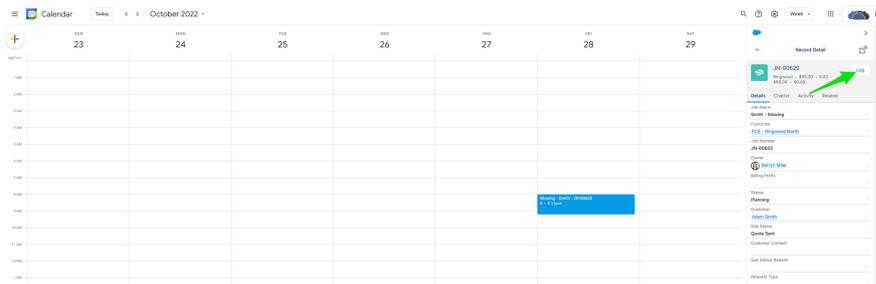
If automatic event syncing is not configured from your personal calendar back to the Salesforce calendar (check with your system administrator) you may still be able to manually log events using the Salesforce extension.

## To log an event to a Salesforce record

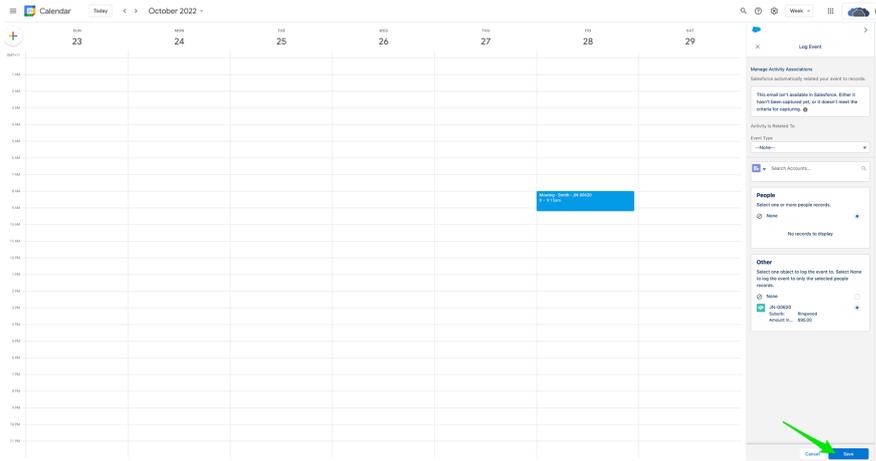
1. In your personal calendar select the event, then search for the appropriate record within the Salesforce search pane.



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

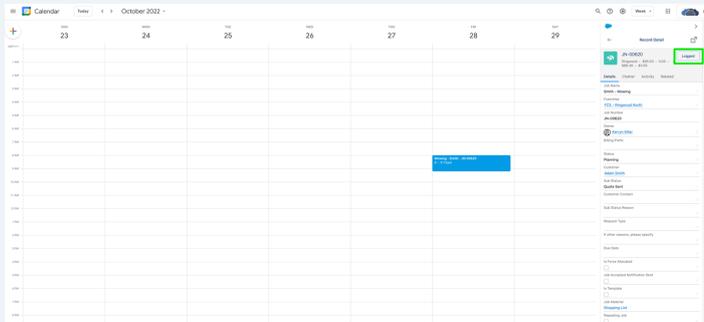


### 3. Now press Save.



## Congratulations

The event is logged to Salesforce.

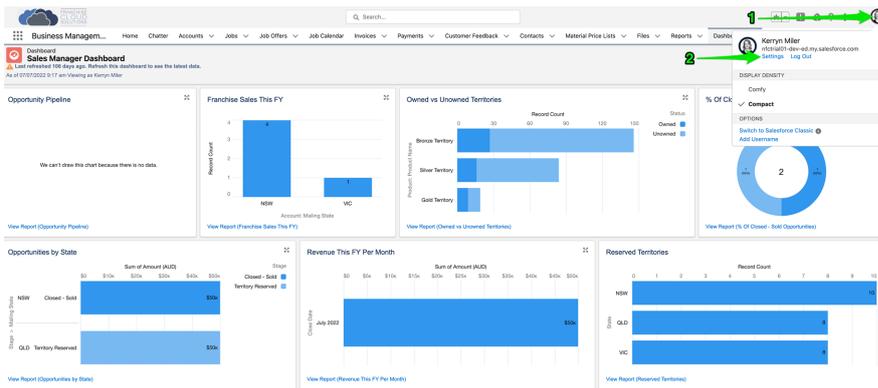


## Configure My Email to Salesforce

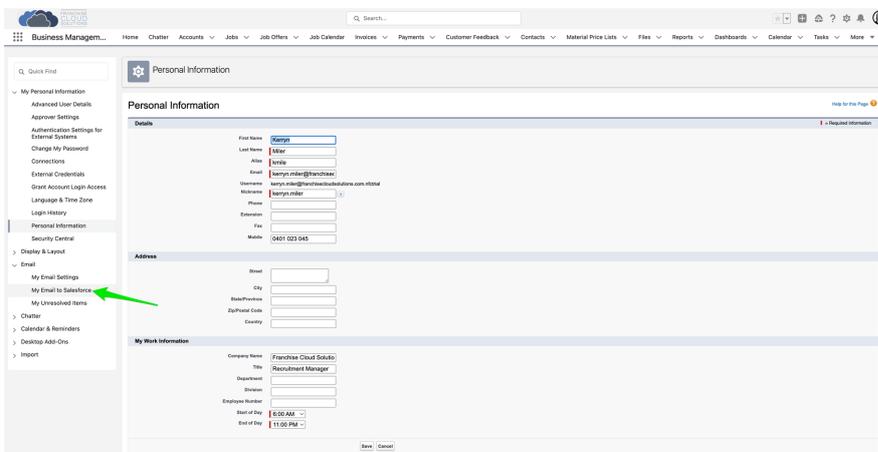
You can configure email to Salesforce to allow you to conveniently forward emails from your mobile to Salesforce for messages relating to a Lead, Contact or Opportunity. This is most useful for recruitment.

# To configure My Email to Salesforce

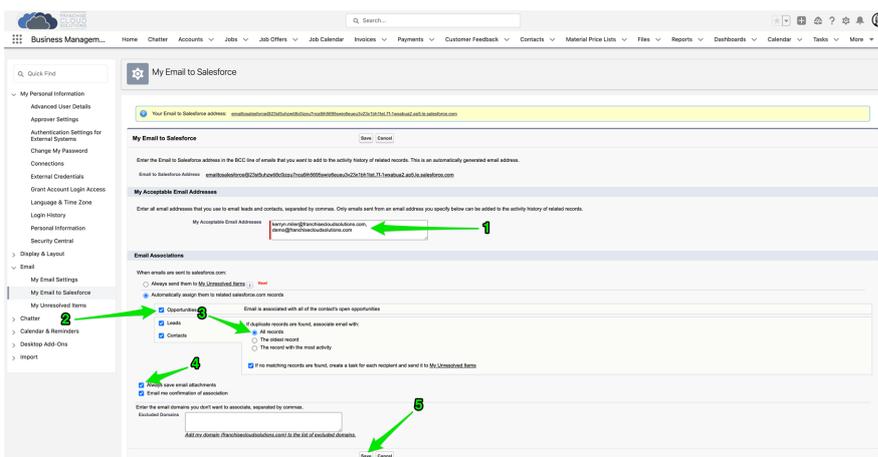
1. In Salesforce, open **View Profile** and then select **Settings**.



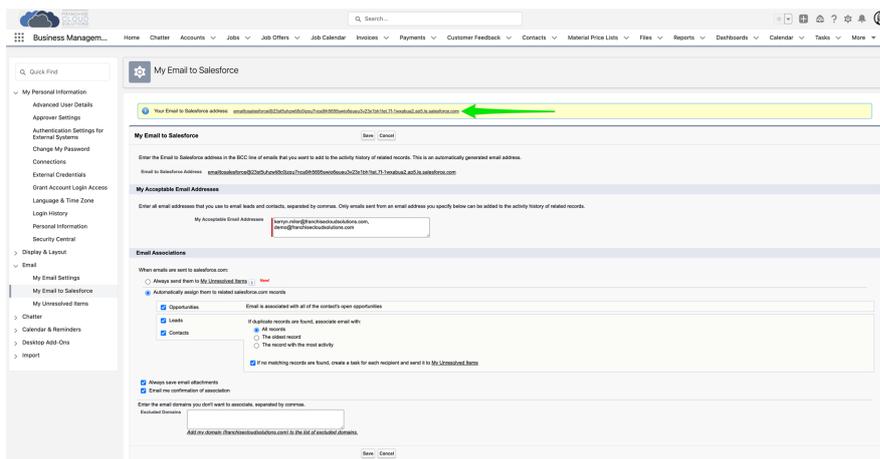
2. From the menu, select **My Email to Salesforce**.



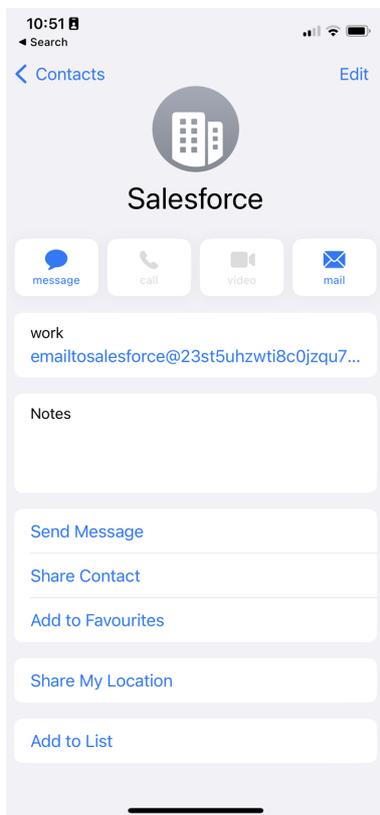
3. In the **My Email to Salesforce** page configure it according to your needs. Add your email address (or email addresses, if you have more than one). Check **Opportunities**. Add email to **All records** when there is a duplicate. Check **Always save mail attachments**. When you're done, press **Save**.



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.

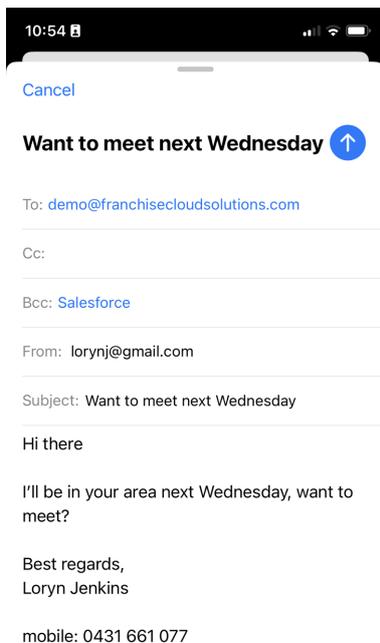


**My Email to Salesforce** provides a way of capturing emails against leads, contacts and opportunities from your phone. My Email to Salesforce is best suited to logging emails to Salesforce when you're on your mobile. One of its limitations is that any email logged through this method is stored text-only. 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

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How to populate leads from your website .....	241
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How to create parent and child campaigns .....	242
How to see a report on hierarchical campaign performance .....	242
How to mark a lead as belonging to a campaign .....	243
How to mark many existing leads as campaign members .....	245
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# Introducing campaigns

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

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

# How to set up a new campaign



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

## To set up a new Campaign

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

The screenshot shows the Salesforce interface for the Campaigns page. The navigation bar at the top includes tabs for Franchise Recruitm..., Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Campaigns, Territories, and More. A search bar is located to the right of the navigation bar. Below the navigation bar, the page header for Campaigns is visible, showing 'Campaigns Recently Viewed' and a 'New' button. A table of campaigns is displayed below the header.

CAMPAIGN NAME	PARENT CAMPAIGN	TYPE	STATUS	START DATE
1 User Conference - Jun 17-19, 2018		Conference	Planned	17/06/2018
2 International Electrical Engineers Association Trade Show - Mar 4-5, 2018		Trade Show	Planned	4/03/2018
3 DM Campaign to Top Customers - May 1-18, 2017		Direct Mail	Completed	1/05/2017
4 GC Product Webinar - Jan 7, 2017		Webinar	Completed	3/07/2017

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

» Enter Campaign Information details.

### Campaign Information

Campaign Owner <b>Marketing</b>	Status Planned
* Campaign Name Franchise Sales Direct Marketing List	Campaign Category ⓘ Franchise Sales
Active <input type="checkbox"/>	Country ⓘ Australia
Type Direct Mail	State ⓘ ACT NSW NT TAS
Parent Campaign NSW Q1 Franchise Sales Drive	
Description Direct mail to purchased list of pre-qualified potential leads.	

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

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

### Planning

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

### System Information

Campaign Record Type  
Recruitment Campaign

3. Press **Save**.

Salesforce now shows you your new Campaign record.

# How to populate leads from your website

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

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

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

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

Campaign field	Value
Campaign Record Type	<i>Recruitment Campaign</i>
Campaign Category	<i>Franchise Sales</i>
Status	<i>In Progress</i>
Active	<i>True</i>

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

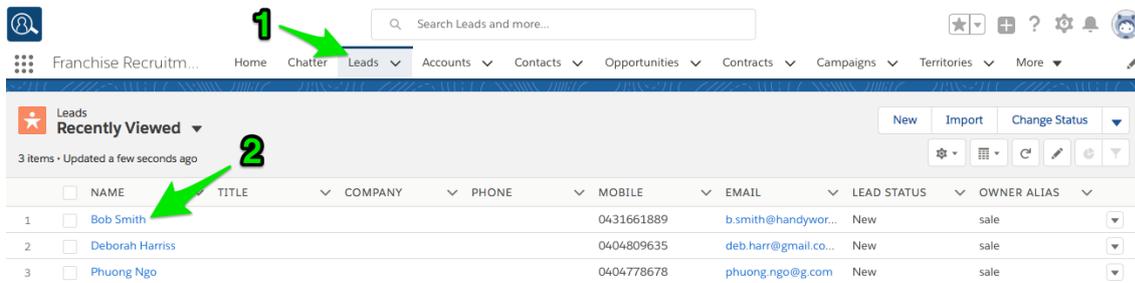
In the **Campaign Detail** page, *Hierarchy ROI* gives you a summary of the return on investment of the current Campaign summed with the ROI of all its child campaigns. To see a more detailed report, look up the standard Salesforce report “Campaign ROI Analysis Report” (found in the Salesforce Marketing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

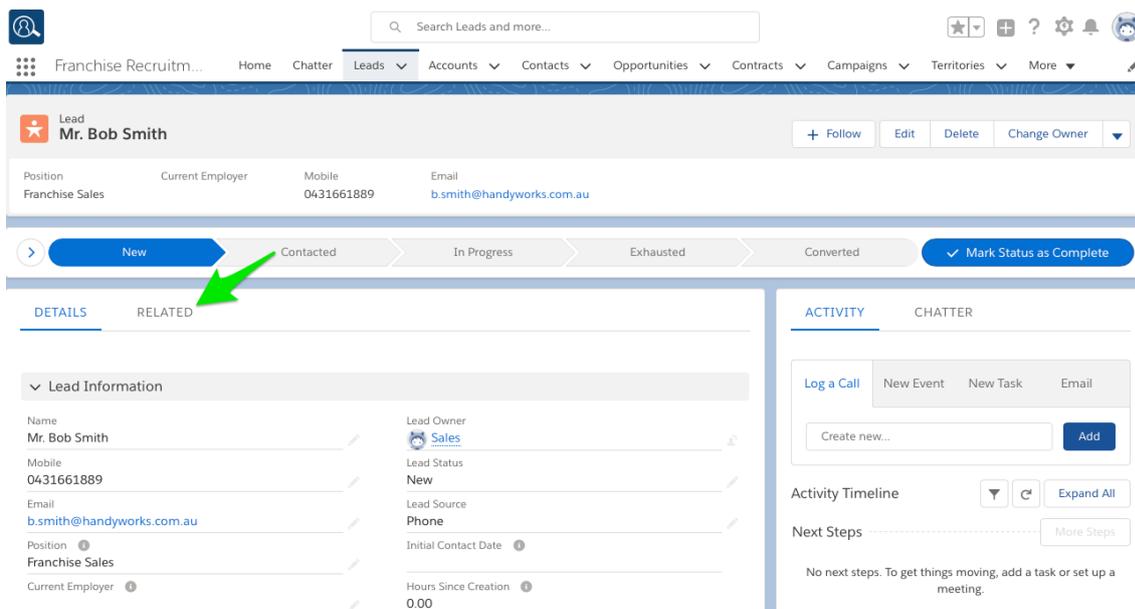
## How to add a Lead as a Campaign Member

1. From the Leads tab, open a Lead.



The Lead page appears.

2. Click on the Related tab.



### 3. Press Add to Campaign.

The screenshot shows a CRM interface for a lead named Mr. Bob Smith. The lead's details include Position (Franchise Sales), Current Employer, Mobile (0431661889), and Email (b.smith@handyworks.com.au). A progress bar at the top shows stages: New, Contacted, In Progress, Exhausted, and Converted, with 'Mark Status as Complete' at the end. The 'RELATED' section contains 'Campaign History (0)' with an 'Add to Campaign' button highlighted by a green arrow, and 'Files (0)' with an 'Add Files' button. The 'ACTIVITY' section on the right includes options for 'Log a Call', 'New Event', 'New Task', and 'Email', along with an 'Add' button. Below this is an 'Activity Timeline' and 'Next Steps' section with a 'More Steps' button.

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

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# Understanding activity lists

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

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

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



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

# Applying an activity list

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

The screenshot shows a CRM interface for an account named 'FCS Newtown'. The account status is 'Inactive'. The page is divided into three main sections: Details, Activity, and Chatter. The 'Details' section is further divided into 'Business Information' and 'Address Information'. The 'Activity' section shows 'Next Steps' and 'Past Activity' with no current activity. The 'Activity Lists' section is highlighted with a green border and contains a table with columns for 'NAME', 'NUMBER OF TASKS', and 'COMPLETED TASKS'. The 'Activity Lists' section also includes an 'Add List' button.

NAME	NUMBER OF TASKS	COMPLETED TASKS
------	-----------------	-----------------

**Activity Lists** [Add List](#)

## To apply an activity list:

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

The screenshot shows the account page for 'FCS Newtowntown'. The account is currently 'Inactive'. The 'ACTIVITY' section on the right has buttons for 'Log a Call', 'New Event', 'New Task', and 'Email'. Below these is an 'Activity Lists' section with a table showing columns for 'NAME', 'NUMBER OF TASKS', and 'COMPLETED TASKS'. A green arrow points to the 'Add List' button in the 'Activity Lists' section.

The New Activity List dialog box appears.

2. Select an available **Template**.

The 'New Activity List' dialog box is shown. It has fields for 'Activity List Name' and 'Related Record Id'. The 'Template' dropdown menu is open, showing options: '--None--', 'Franchisee On-boarding Process', and 'Growth Visit Template'. A green arrow points to the 'Franchisee On-boarding Process' option. At the bottom, there are 'Cancel' and 'Save' buttons.

### 3. Enter the Activity List Name and press Save.

New Activity List

\* Activity List Name

\* Template  
Franchisee On-boarding Process

\* Related Record Id  
0017F00000YnznINQAR

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

The screenshot shows the Salesforce interface for the account 'FCS Newtown'. The account status is 'Inactive'. The 'Next Steps' section is highlighted with a green box and contains two tasks: 'New Franchisee Induction course' due 27/03 and 'Issue New Franchisee Information...' due tomorrow. The 'Activity Lists' section is also highlighted with a green box and shows a table with one entry: 'FCS Newtown On-boarding' with 5 tasks and 0 completed tasks.

NAME	NUMBER OF TASKS	COMPLETED TASKS
FCS Newtown On-boarding	5	0

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**.

The screenshot shows the Salesforce interface for an account named 'FCS Newtown'. The account status is 'Inactive'. The page is divided into several sections:

- Account Details:** Billing Address (18 Magnus Avenue, Sinclair WA 7885, Australia), Status (Inactive), and Status Reason.
- Account Owner:** REC Sales Manager.
- Business Information:** Legal Entity Name (FCS Newtown Pty Ltd), Business Number (49 389 782 542), Trading Name (FCS Newtown), and Company (Company).
- Address Information:** Billing Address (18 Magnus Avenue, Sinclair WA 7885, Australia) and Shipping Address.
- System Information:** (Collapsed section).
- Activity Section:** Includes 'Log a Call' (New Event, New Task, Email), 'Activity Timeline', and 'Next Steps'. Two tasks are listed in the 'Next Steps' section, highlighted with a green box:
  - New Franchisee Induction course** (27/03) - You have an upcoming Task.
  - Issue New Franchisee Information...** (Tomorrow) - You have an upcoming Task.
- Past Activity:** No past activity. Past meetings and tasks marked as done show up here.
- Activity Lists:** A table with columns for NAME, NUMBER OF TASKS, and COMPLETED TASKS. One list is shown: 'FCS Newtown On-boarding'.

## To view more details about an individual task:

» Click the task arrow to reveal more information.

The screenshot shows a CRM interface for an account named 'FCS Newtown'. The account status is 'Inactive'. The page is divided into 'DETAILS' and 'ACTIVITY' sections. The 'DETAILS' section includes fields for Account Name, Parent Account, Status, Timezone, Next Review Due Date, Next Review Date, Business Information (Legal Entity Name, Business Number, Trading Name, Company Number), Address Information (Billing Address, Shipping Address), and System Information (Created By, Last Modified By, Master Franchise, Account Record Type, Account Currency). The 'ACTIVITY' section includes a 'Log a Call' form, an 'Activity Timeline', and 'Next Steps'. A task titled 'New Franchisee Induction course' is highlighted with a green box. The task description reads: 'The franchisee owner is booked into the induction training course.' A green arrow points to the expand/collapse arrow on the left of the task. Below the task is another task 'Issue New Franchisee Information...' and a 'Past Activity' section. At the bottom, there is an 'Activity Lists' section with a table showing 'FCS Newtown On-boarding'.

NAME	NUMBER OF TASKS	COMPLETED TASKS
FCS Newtown On-boarding		

To reveal more tasks:

» Press More Steps.

The screenshot shows a CRM interface for an account named 'FCS Newtown'. The account status is 'Inactive'. The interface is divided into two main sections: 'DETAILS' and 'ACTIVITY'.

**DETAILS:**

- Account Information:** Account Name: FCS Newtown, Parent Account, Status: Inactive, Timezone.
- Business Information:** Legal Entity Name: FCS Newtown Pty Ltd, Business Number: 49 389 782 542, Trading Name: FCS Newtown, Company Number, Operating Structure: Company.
- Address Information:** Billing Address: 18 Magnus Avenue, Sinclair WA 7885, Australia; Shipping Address.
- System Information:** Created By: REC Sales Manager, 17/03/2018 2:58 AM; Last Modified By: REC Sales Manager, 17/03/2018 3:30 AM; Master Franchise: FCS NSW; Account Currency: Australian Dollar; Account Record Type: Franchise Profile.

**ACTIVITY:**

- Log a Call:** New Event, New Task, Email. Create new... Add.
- Activity Timeline:** Expand All.
- Next Steps:** A green box highlights three tasks:
  - Issue Operations & OH&S Documents (27/03): You have an upcoming Task.
  - New Franchisee Induction course (27/03): You have an upcoming Task. Description: The franchisee owner is booked into the induction training course.
  - Issue New Franchisee Information... (Tomorrow): You have an upcoming Task.A green arrow points to the 'More Steps' link.
- Past Activity:** No past activity. Past meetings and tasks marked as done show up here. Load More Past Activities.
- Activity Lists:** Add List.

NAME	NUMBER OF TASKS	COMPLETED TASKS
FCS Newtown On-boarding		

To mark a task as complete:

» Check the task check box.

The screenshot shows the 'FCS Newtown' account page. The 'Next Steps' section contains the following tasks:

- ~~Issue Operations & OH&S Documents~~ 27/03  
You have an upcoming Task
- ~~New Franchisee Induction course~~ 27/03  
You have an upcoming Task  
Description: The franchisee owner is booked into the induction training course.
- Issue New Franchisee Information... Tomorrow  
You have an upcoming Task

The 'Past Activity' section shows: No past activity. Past meetings and tasks marked as done show up here.

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**.

The screenshot displays a CRM interface for an account named 'FCS Newtown'. The account status is 'Inactive'. The interface is divided into two main sections: 'DETAILS' and 'ACTIVITY'.

**Account Details:**

- Account Name:** FCS Newtown
- Status:** Inactive
- Account Owner:** REC Sales Manager
- Phone:** 0448997335
- Business Information:**
  - Legal Entity Name: FCS Newtown Pty Ltd
  - Business Number: 49 389 782 542
  - Trading Name: FCS Newtown
  - Company Number: [Redacted]
- Address Information:**
  - Billing Address: 18 Magnus Avenue, Sinclair WA 7885, Australia
  - Shipping Address: [Redacted]
- System Information:**
  - Created By: REC Sales Manager, 17/03/2018 2:58 AM
  - Last Modified By: REC Sales Manager, 17/03/2018 3:30 AM
  - Master Franchise: FCS NSW
  - Account Record Type: Franchise Profile
  - Account Currency: Australian Dollar

**Activity Section:**

- Activity Timeline:** Shows upcoming tasks:
  - Issue Operations & OH&S Documents (27/03) - You have an upcoming Task
  - Issue New Franchisee Information... (Tomorrow) - You have an upcoming Task
- Past Activity:** Shows completed tasks:
  - New Franchisee Induction course (27/03) - You had a Task** (This entry is highlighted with a green box in the original image)

Below the activity list is an 'Activity Lists' section with a table:

NAME	NUMBER OF TASKS	COMPLETED TASKS
FCS Newtown On-boarding		



# CHAPTER 11

## Working with Reports

Understanding reports .....	260
Standard reports .....	265
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How to run a report .....	268
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How to add report results as campaign members .....	273

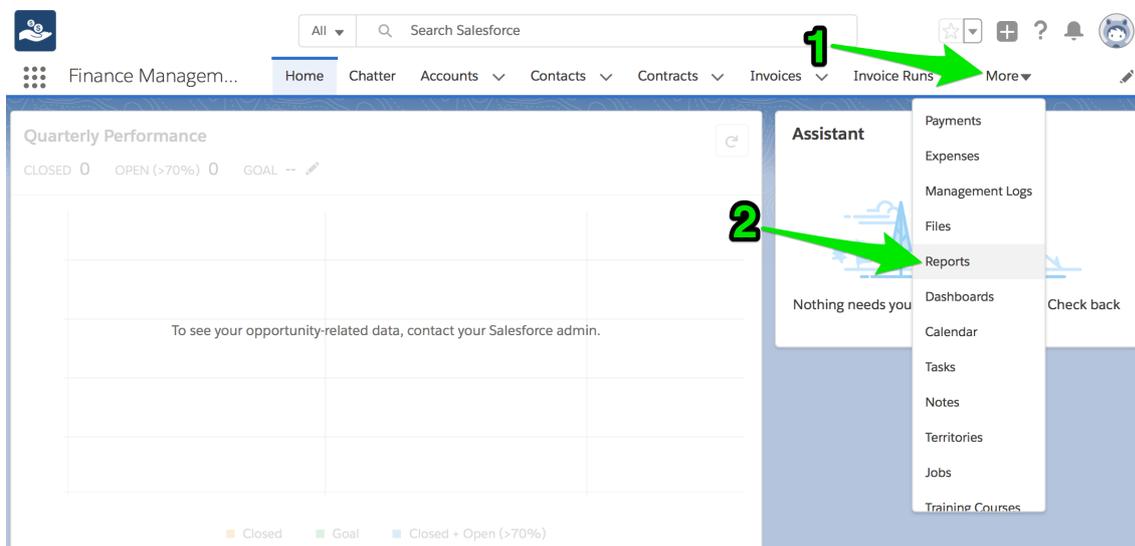
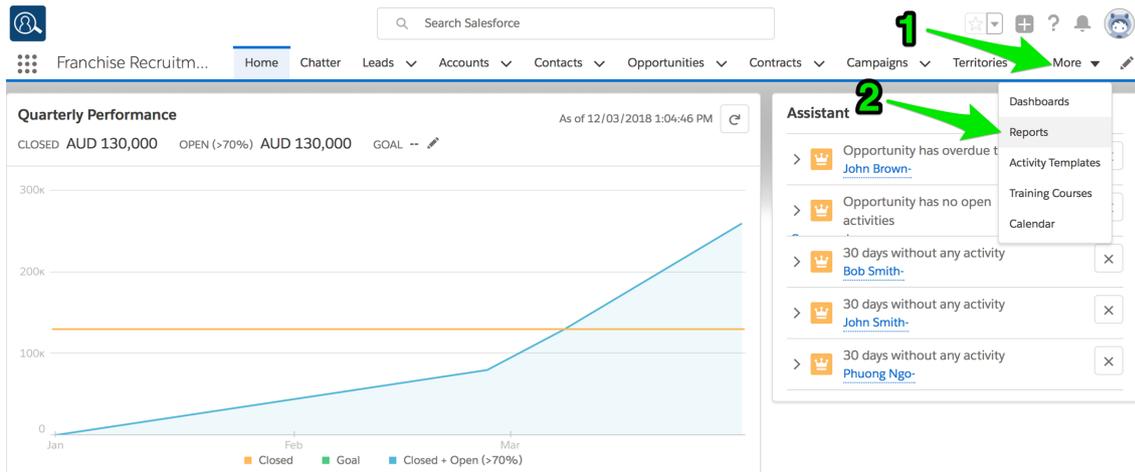
# Understanding reports

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.

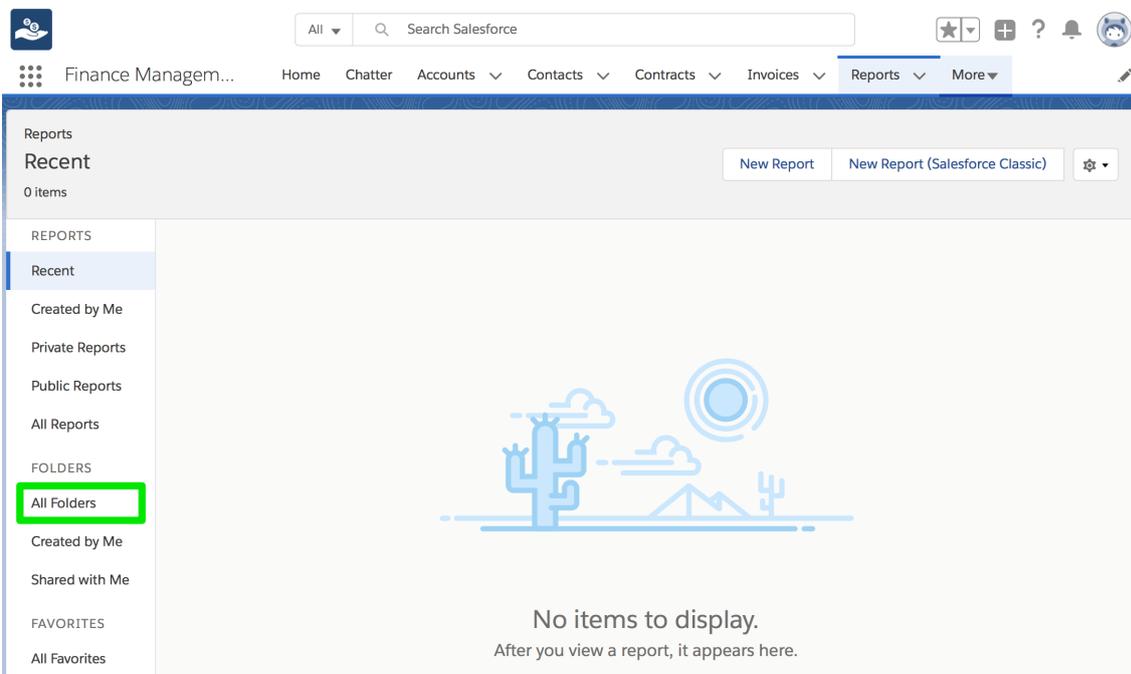
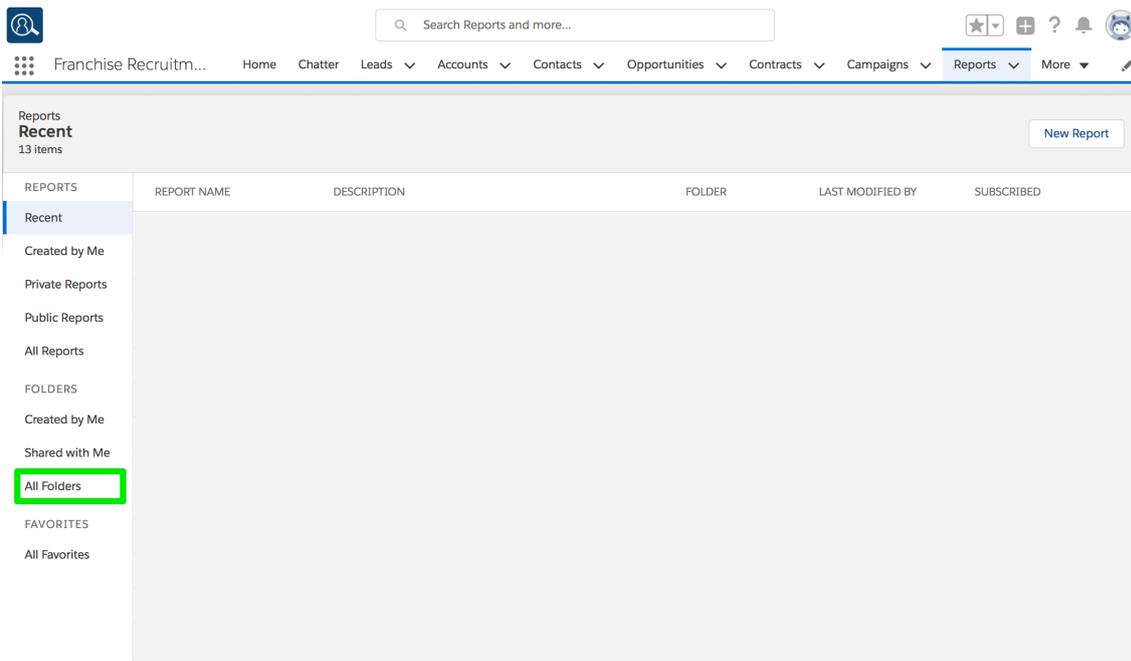
## To discover available reports

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.

Reports  
All Folders  
4 items • Sorted by Folder Name

REPORTS

FOLDER NAME ↑	CREATED BY	LAST MODIFIED BY	CREATED ON
Compliance Reports	Integration User	Integration User	25/09/2017 10:03 AM
Franchise Operations Reports	Integration User	Integration User	25/09/2017 10:03 AM
Marketing Reports	Integration User	Integration User	25/09/2017 10:13 AM
Sales Reports	Integration User	Integration User	25/09/2017 10:13 AM

FOLDERS

- Created by Me
- Shared with Me
- All Folders
- FAVORITES
- All Favorites

Reports  
All Folders  
2 items

REPORTS

NAME	CREATED BY	CREATED ON	LAST MODIFIED BY	LAST MODIFIED DATE
Finance Reports	Integration User	14/03/2018, 9:45 am	Integration User	14/03/2018, 9:45 am
Head Office Reports	Integration User	14/03/2018, 9:45 am	Integration User	14/03/2018, 9:45 am

FOLDERS

- Created by Me
- Shared with Me
- FAVORITES
- All Favorites

Now you can see the reports within that folder.

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Reports More

Search Reports and more...

Reports  
All Folders > Sales Reports  
12 items - Sorted by Report Name

REPORTS	REPORT NAME ↑	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Recent	% Of Closed - Sold Opportun...		Sales Reports	Integration User	<input type="checkbox"/>
Created by Me	Franchise Sales by Sales Mana...		Sales Reports	Integration User	<input type="checkbox"/>
Private Reports	Franchise Sales This FY		Sales Reports	Integration User	<input type="checkbox"/>
Public Reports	Opportunities by Owner & Sta...		Sales Reports	Integration User	<input type="checkbox"/>
All Reports	Opportunities by State		Sales Reports	Integration User	<input type="checkbox"/>
FOLDERS	Opportunity Pipeline	Opportunity Pipeline Report	Sales Reports	Integration User	<input type="checkbox"/>
Created by Me	Opportunity Pipeline		Sales Reports	REC Sales Manager	<input type="checkbox"/>
Shared with Me	Opportunities	All Opportunities	Sales Reports	Integration User	<input type="checkbox"/>
All Folders	Reserved Territories	Reserved Territories	Sales Reports	Integration User	<input type="checkbox"/>
FAVORITES	Territories For Resale		Sales Reports	Integration User	<input type="checkbox"/>
All Favorites	Territories With Buy Back Con...		Sales Reports	Integration User	<input type="checkbox"/>
	Territories With Buy Back Con...		Sales Reports	Integration User	<input type="checkbox"/>

Finance Managem... Home Chatter Accounts Contacts Contracts Invoices Reports More

All Search Salesforce

Reports  
All Folders > Finance Reports  
5 items

REPORTS	NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Recent	Payments by Month		Finance Reports	Integration User	14/03/2018, 9:45 ...	<input type="checkbox"/>
Created by Me	HO Ops Monthly Sa...		Finance Reports	Integration User	14/03/2018, 9:45 ...	<input type="checkbox"/>
Private Reports	Expenses by Week		Finance Reports	Integration User	14/03/2018, 9:45 ...	<input type="checkbox"/>
Public Reports	Expenses by Franchi...		Finance Reports	Integration User	14/03/2018, 9:45 ...	<input type="checkbox"/>
All Reports	Invoice Status Report		Finance Reports	Integration User	29/08/2018, 11:03...	<input type="checkbox"/>

- 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.

Franchise Recruitment... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Reports More

Search Reports and more...

Reports Recent 13 items New Report

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Recent	Converted Leads by Month		Marketing Reports	Integration User	<input type="checkbox"/>
Created by Me	Compliance - 14 Days from ...		Compliance Reports	Integration User	<input type="checkbox"/>
Private Reports	Campaign ROI Analysis Rep...		Marketing Reports	Integration User	<input type="checkbox"/>
Public Reports	Lead Conversion		Marketing Reports	FCS Sys Admin	<input type="checkbox"/>
All Reports	Upcoming Renewals - Next ...		Compliance Reports	Integration User	<input type="checkbox"/>
FOLDERS	Upcoming Renewals - Next ...		Compliance Reports	Integration User	<input type="checkbox"/>
Created by Me	Territories With Buy Back Co...		Sales Reports	Integration User	<input type="checkbox"/>
Shared with Me	Territories For Resale		Sales Reports	Integration User	<input type="checkbox"/>
All Folders	Reserved Territories	Reserved Territories	Sales Reports	Integration User	<input type="checkbox"/>
FAVORITES	Opportunities	All Opportunities	Sales Reports	Integration User	<input type="checkbox"/>
All Favorites	Opportunity Pipeline	Opportunity Pipeline Report	Sales Reports	Integration User	<input type="checkbox"/>
	Opportunities by Owner & S...		Sales Reports	Integration User	<input type="checkbox"/>
	Opportunity Pipeline		Sales Reports	REC Sales Manager	<input type="checkbox"/>

Finance Managem... Home Chatter Accounts Contacts Contracts Invoices Reports More

All Search Salesforce

Reports Recent 9 items New Report New Report (Salesforce Classic) Settings

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Recent	All Jobs by State & Source		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Created by Me	Jobs Historical Trends		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Private Reports	Zero Job Offers By State		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Public Reports	Active Territories by State		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
All Reports	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 screenshot shows the 'Reports' section of the Franchise Recruitment system. The page has a search bar at the top and a navigation menu. The main content area displays a list of reports under the 'Recent' folder. The table below shows the details of these reports.

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Recent	Opportunity Pipeline	Opportunity Pipeline Report	Sales Reports	Integration User	<input type="checkbox"/>
Created by Me	Converted Leads by Month		Marketing Reports	Integration User	<input type="checkbox"/>
Private Reports	Compliance - 14 Days from ...		Compliance Reports	Integration User	<input type="checkbox"/>
Public Reports	Campaign ROI Analysis Rep...		Marketing Reports	Integration User	<input type="checkbox"/>
All Reports	Lead Conversion		Marketing Reports	FCS Sys Admin	<input type="checkbox"/>
FOLDERS	Upcoming Renewals - Next ...		Compliance Reports	Integration User	<input type="checkbox"/>
Created by Me	Upcoming Renewals - Next ...		Compliance Reports	Integration User	<input type="checkbox"/>
Shared with Me	Territories With Buy Back Co...		Sales Reports	Integration User	<input type="checkbox"/>
All Folders	Territories For Resale		Sales Reports	Integration User	<input type="checkbox"/>
FAVORITES	Reserved Territories	Reserved Territories	Sales Reports	Integration User	<input type="checkbox"/>
All Favorites	Opportunities	All Opportunities	Sales Reports	Integration User	<input type="checkbox"/>
	Opportunities by Owner & S...		Sales Reports	Integration User	<input type="checkbox"/>
	Opportunity Pipeline		Sales Reports	REC Sales Manager	<input type="checkbox"/>

The Edit Subscription dialog box appears.

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

Edit Subscription

---

**Schedule**

Frequency

Daily  Weekly  Monthly

Days

SUN  MON  TUE  WED  THU  FRI  SAT

Time (Australia/Sydney)

After subscribing, you'll receive refreshed report results by email.

The report is now listed as being subscribed.

Search Reports and more...

Franchise Recruitm... Home Chatter Leads Accounts Contacts Opportunities Contracts Campaigns Reports More

Reports Recent 13 items New Report

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Recent	Opportunity Pipeline	Opportunity Pipeline Report	Sales Reports	Integration User	<input checked="" type="checkbox"/>
Created by Me	Opportunities	All Opportunities	Sales Reports	Integration User	<input type="checkbox"/>
Private Reports	Converted Leads by Month		Marketing Reports	Integration User	<input type="checkbox"/>
Public Reports	Compliance - 14 Days from ...		Compliance Reports	Integration User	<input type="checkbox"/>
All Reports	Campaign ROI Analysis Rep...		Marketing Reports	Integration User	<input type="checkbox"/>
FOLDERS	Lead Conversion		Marketing Reports	FCS Sys Admin	<input type="checkbox"/>
Created by Me	Upcoming Renewals - Next ...		Compliance Reports	Integration User	<input type="checkbox"/>
Shared with Me	Upcoming Renewals - Next ...		Compliance Reports	Integration User	<input type="checkbox"/>
All Folders	Territories With Buy Back Co...		Sales Reports	Integration User	<input type="checkbox"/>
FAVORITES	Territories For Resale		Sales Reports	Integration User	<input type="checkbox"/>
All Favorites	Reserved Territories	Reserved Territories	Sales Reports	Integration User	<input type="checkbox"/>
	Opportunities by Owner & S...		Sales Reports	Integration User	<input type="checkbox"/>
	Opportunity Pipeline		Sales Reports	REC Sales Manager	<input type="checkbox"/>

# 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 screenshot shows the Salesforce interface for the 'Opportunity Pipeline' report. The top navigation bar includes 'Franchise Recruitm...', 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Contracts', 'Campaigns', 'Reports', and 'More'. A search bar is present. The report header shows 'REPORT Opportunity Pipeline' and 'Total Records 40'. A table lists various opportunities with columns for Stage, Opportunity Name, State of Interest, Amount Sum, Probability (%), Age, Created Date, Opportunity Owner, and Name. A green arrow labeled '1' points to the 'More' button in the top right. Another green arrow labeled '2' points to the 'Export' option in the dropdown menu that appears after clicking 'More'.

The screenshot shows the Salesforce interface for the 'Invoice Status Report'. The top navigation bar includes 'Finance Managem...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Invoices', 'Invoice Runs', 'Reports', and 'More'. A search bar is present. The report header shows 'REPORT Invoice Status Report' and summary statistics: 'Total Records 7', 'Total Amount Inc Tax AUD 9,127.20', 'Total Amount Paid AUD 4,230.00', 'Total Amount Owing AUD 4,891.00', and 'Total Amount Credited AUD 6.20'. A table lists invoice details with columns for Sync Status, Invoice Number, Account, Job, Invoice Date, Due Date, Amount Inc Tax, Amount Paid, Amount Owing, Amount Credited, Has Been Emailed?, and Status. A green arrow labeled '1' points to the 'More' button in the top right. Another green arrow labeled '2' points to the 'Export' option in the dropdown menu that appears after clicking 'More'.

The Export dialog box appears.

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

Export

---

Export View

**Formatted Report**

Export the report as it appears in Salesforce, including the report header, groupings, and filter details.

**Details Only**

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format

Excel Format .xlsx

Cancel Export

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**.

Export

---

Export View

**Formatted Report**

Export the report as it appears in Salesforce, including the report header, groupings, and filter details.

**Details Only**

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format

Excel Format .xls

Encoding

ISO-8859-1 (General US & Western Europe)

Cancel 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

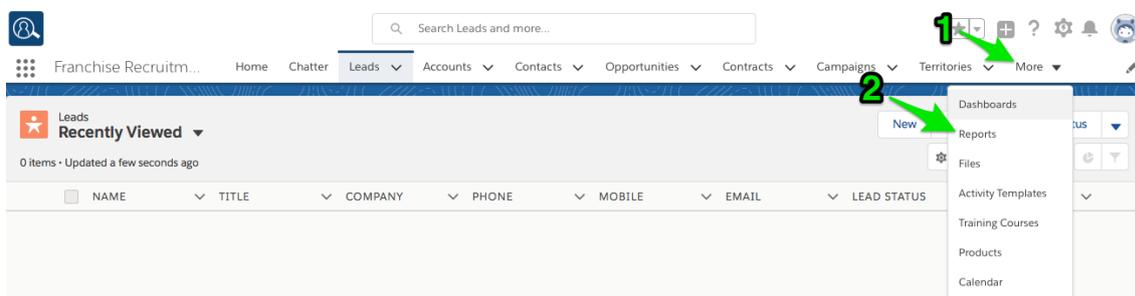
Sometimes you want to add many Lead records that already exist within Salesforce to a campaign. You do this by running a report and making all report results become members of the campaign.



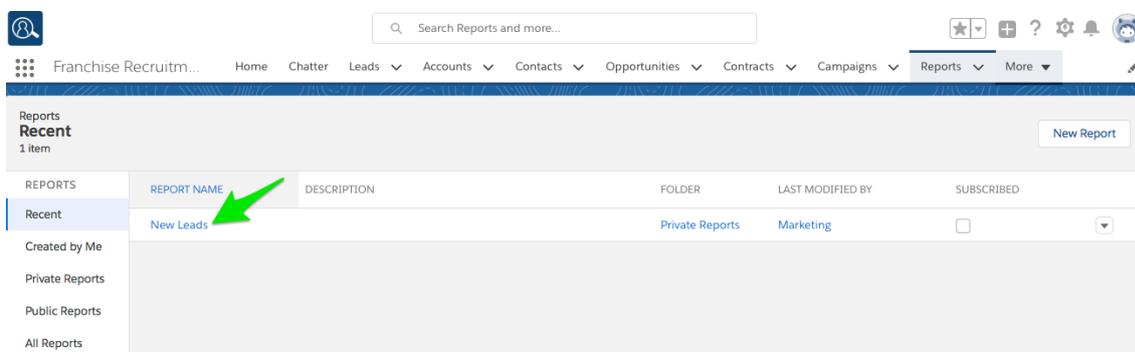
You need to have *Marketing User* checked in your user information. Your system administrator will need to set this for you.

## To add report results as Campaign Members

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

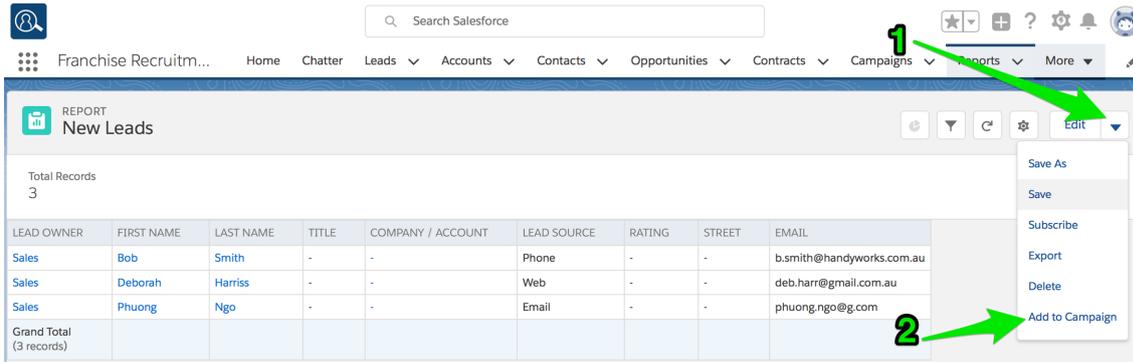


2. Choose a report.



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

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# 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](mailto: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.

Service Desk / Franchise Cloud Solutions

### Franchise Cloud Solutions

Welcome to Franchise Cloud Solution's Service Desk. Raise any request with us by choosing an option below.

What can we help you with?



[How do I...](#)

Help using our products.



[Technical support](#)

Help installing, configuring, or troubleshooting.



[Report a bug](#)

Tell us the problems you're experiencing.



[Suggest improvement](#)

See a place where we can do better? We're all ears.



[Suggest a new feature](#)

Let us know your idea for a new feature.



[Licensing and billing questions](#)

Choose this if you have questions about licensing or billing.



[Other questions](#)

Don't see what you're looking for? Select this option and we'll help you out.

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 your 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

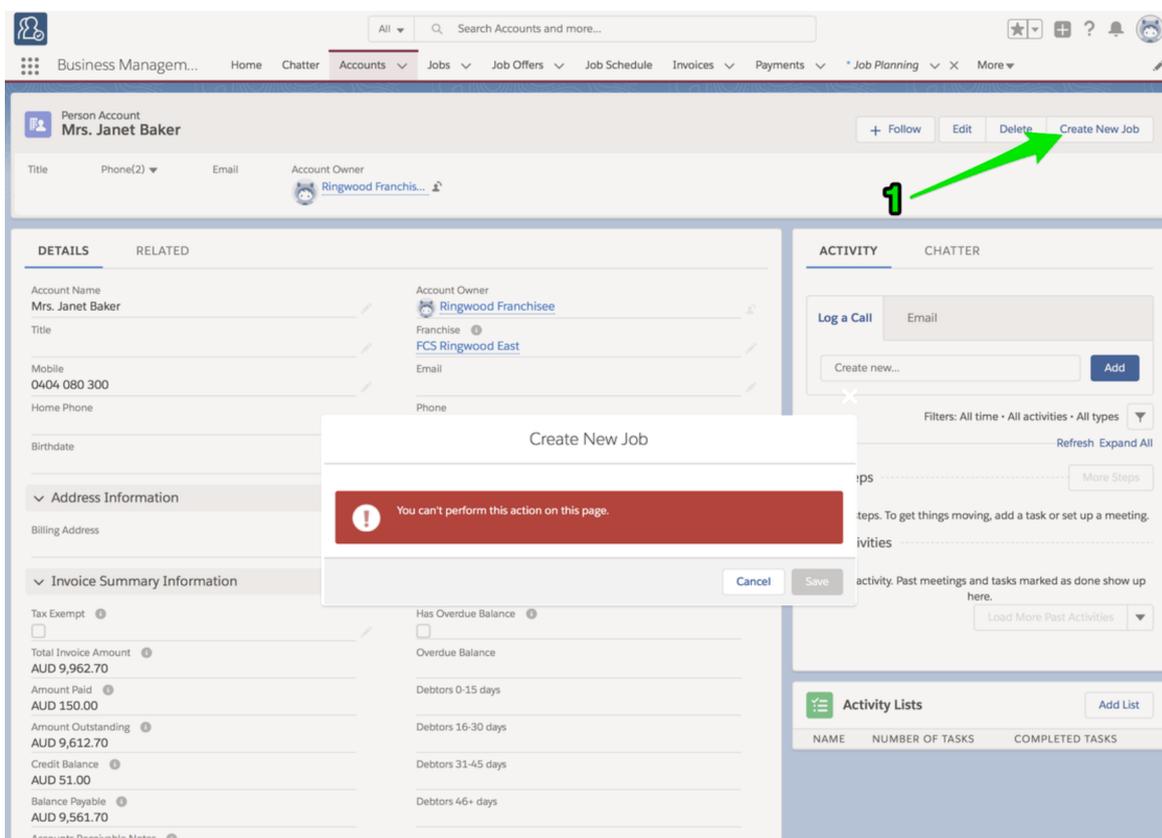
Cannot create new job from a customer's Account page.

*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.

The screenshot shows a Salesforce account page for 'FCS Ringwood East'. The account details include: Type (Phone: 0404 030 808), Account Owner (Loryn Jenkins), and Industry. The 'Account Code Mapping Setup' dialog is open, displaying a red error banner: 'A Component Error has occurred!'. The message text reads: 'Uncaught afterRender threw an error in 'lightning:dualListbox' [Cannot read property 'filter' of undefined]'. Below the message, the 'Component Descriptor' is 'markup://lightning:dualListbox'. The 'File Name' is 'ed.lightning.force.com/components/lightning/dualListbox.js' and the 'Function' is 'H.validateSelection'. A table shows 'Line' 2 and 'Column' 17398. The 'Stack Trace' is expanded, showing the following error details: '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'. The dialog has 'Cancel' and 'Save' buttons at the bottom.

### 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

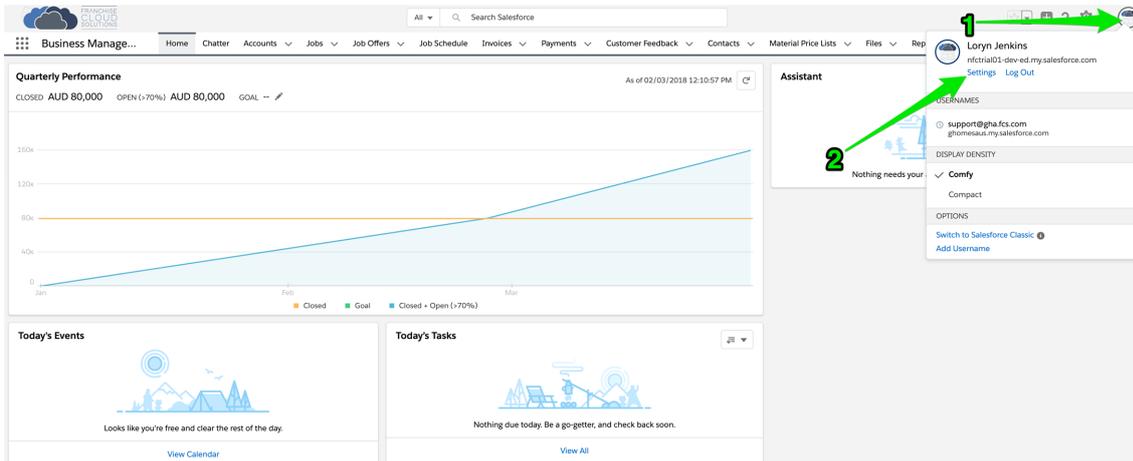
- » Who affected: All franchisees, Users of Job Calendar.
- » Visibility: 40 times per month per franchisee.
- » Block: None.

# Granting Account Login Access

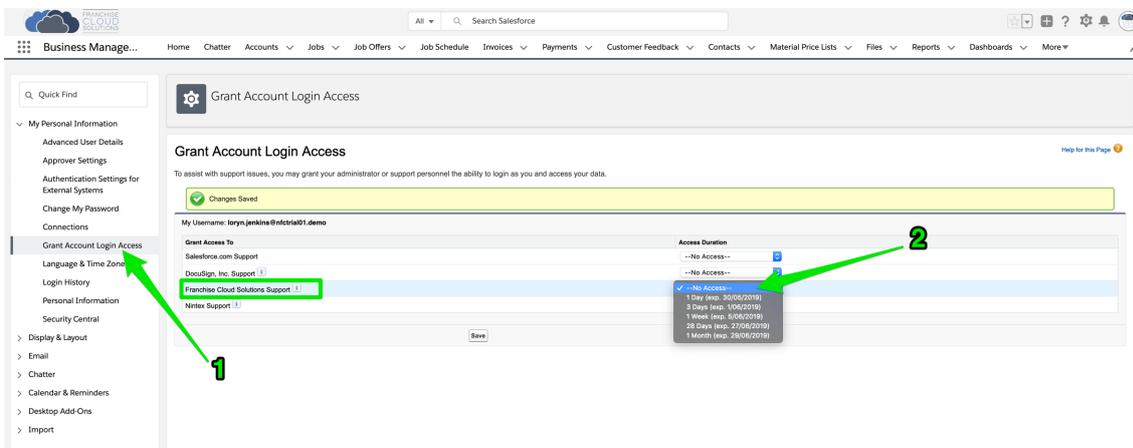
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

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.

The screenshot shows the Salesforce user interface for 'Grant Account Login Access'. The page title is 'Grant Account Login Access'. Below the title, there is a message: 'To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.' A green banner indicates 'Changes Saved'. The user's name is 'My Username: keryn.jenkins@nclcloud01.demo'. The main content is a table with two columns: 'Grant Access To' and 'Access Duration'. The table has three rows: 'Salesforce.com Support' with '--No Access--', 'DocuSign, Inc. Support' with '--No Access--', and 'Franchise Cloud Solutions Support' with '1 Week (exp. 5/06/2019)'. A 'Save' button is located at the bottom of the table, highlighted by a green arrow.

Grant Access To	Access Duration
Salesforce.com Support	--No Access--
DocuSign, Inc. Support	--No Access--
Franchise Cloud Solutions Support	1 Week (exp. 5/06/2019)



You can revoke access at any time.