



# Operations Management Administration Guide

version 1.25



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

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# CHAPTER 1

## Getting Started

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# Introduction

Franchise Cloud Solutions Operations Management is part of the FranchiseOps application package, which is designed especially for the franchise industry. It provides an efficient platform for franchise businesses to manage

- » distributing job opportunities to the optimal franchisee for each job
- » planning, quoting and scheduling jobs
- » efficient and accurate generation of quotes and invoices
- » collection of payments
- » management of customer feedback

Operations Management will help any franchisor

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

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



SMS messaging is an optional product.

Please refer to the **SMS Management Administration Guide** for configuration details.

## Where to start

This guide describes how to perform Administration tasks specific to Operations Management.

We recommend you consult Salesforce documentation for help [configuring the Salesforce Platform](#). You will find Salesforce documentation especially useful in

- » Managing users
  - » Refer to [Salesforce documentation on User Management](#)
- » Importing and exporting data
  - » Refer to [Salesforce documentation on Data Loader](#)

This guide is to be read in conjunction with

- » Head Office User Guides
  - » [Operations Management for Management Teams](#)
  - » [Operations Management for Finance Professionals](#)
- » Administration Guides
  - » [Operations Management Administration Guide](#)
- » Franchisee User Guides
  - » [Business Management for Franchisees](#)
- » Site-specific notes
  - » **System Implementation Notes**

In particular, the **System Implementation Notes** will inform you as to the

- » licensed options
- » configuration settings and options for your site
- » any site-specific customizations that may affect behavior
- » design of the Job Offer SMS conversation configured for your business

# Understanding data visibility

FranchiseOps has hierarchical data ownership and visibility. Visibility is enforced through Salesforce sharing rules. When you are logged into an account with permissions set to a certain role in the hierarchy, you can see data available to that role and all roles below it, but you cannot see data belonging to sibling or parent roles.

A typical implementation may contain levels such as

- » System
- » Country Master Franchise
- » State Master Franchise
- » Regional Master Franchise
- » Franchisees



If you have access to the State Master Franchise, then you can see data for Regional Master Franchises and Franchisees within your territories.

For more information about

- » Data visibility in Salesforce,
  - » Refer to Salesforce Documentation, [Control Who Sees What](#)
- » Sharing rules,
  - » Refer to Salesforce Documentation, [Sharing Rules](#)
- » Implementation of sharing rules on your site,
  - » Refer to **Site Implementation Notes**

# CHAPTER 2

## Working with Master Franchise Profile Accounts

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# How to create a master franchise profile account

To create a Master Franchise Profile Account

1. Go to **Accounts**.
2. Choose **New**.  
The **New Account** dialog appears.
3. Choose **Master Franchise Profile** then **Next**.  
The **New Account: Master Franchise Profile** dialog appears.
4. Enter the **Account Name**, **Default Tax Rate** and any other relevant information you have to hand. Press **Save**.

You have now created a new Master Franchise Profile account.



After creating a Master Franchise Profile Account, the next most common steps are to

- » Associate the account with a Configuration Set (See “Setting up the master franchise profile account configuration set” on page 8).
- » Associate the account with a Master Territory (See “How to create a master territory” on page 26).

# CHAPTER 3

## Working with Configuration Sets

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# Setting up the master franchise profile account configuration set

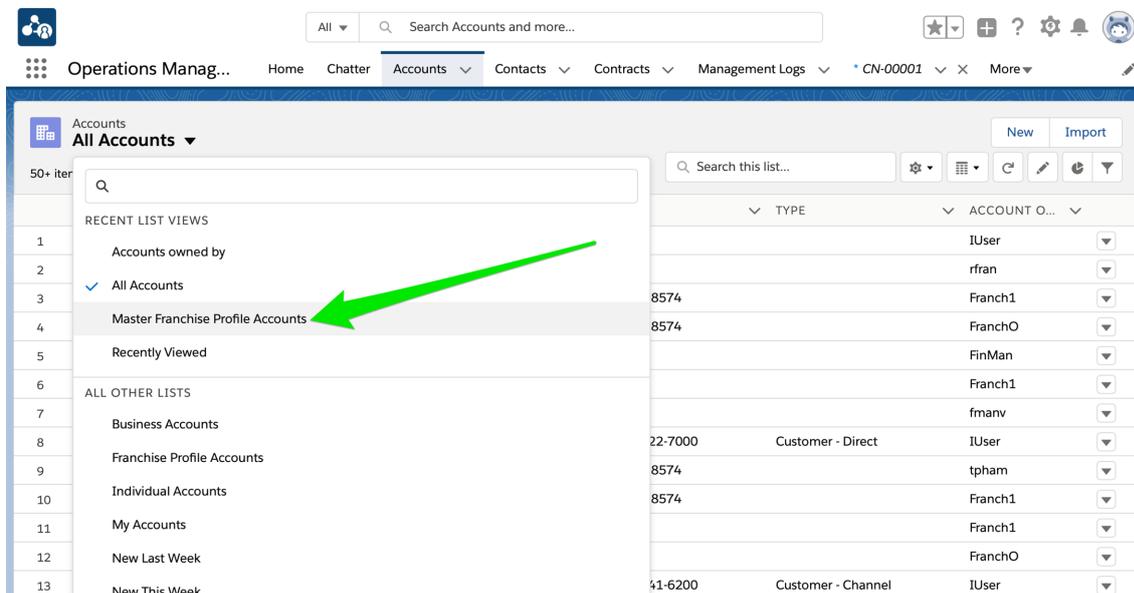
There are a wide range of behaviors within Operations Management that can be configured for each Master Franchise Profile Account. Multiple Master Franchise Profile Accounts can share Configuration Sets, thus displaying uniform behavior. They can also be configured with separate Configuration Sets to implement varying behavior.

Configuration Sets control behaviors across the following areas

- » Sequence numbering
- » Survey frequency
- » Escalation settings
- » Contract expiry notification
- » SMS configuration for automated job allocation messages
- » Job allocation settings
- » Xero integration

## To locate the Configuration Set for a Master Franchise Profile Account

1. From the **Accounts** tab, select the **Master Franchise Profile Accounts** list view.



The screenshot shows the 'Accounts' tab in the Operations Management interface. The left-hand menu is open, displaying a list of account views. A green arrow points to the 'Master Franchise Profile Accounts' option, which is currently selected. The main content area shows a table of accounts with columns for 'TYPE' and 'ACCOUNT O...'. The table contains several rows of account data, including 'IUser', 'rfran', 'Franch1', 'FranchO', 'FinMan', 'fmanv', 'IUser', 'tpham', 'Franch1', 'Franch1', 'FranchO', and 'IUser'.

TYPE	ACCOUNT O...
IUser	
rfran	
8574	Franch1
8574	FranchO
	FinMan
	Franch1
	fmanv
22-7000	Customer - Direct
8574	tpham
8574	Franch1
	Franch1
	FranchO
41-6200	Customer - Channel
	IUser

## 2. Select the Master Franchise Profile Account.

The screenshot shows the 'Accounts' section of the Operations Manager interface. The page title is 'Master Franchise Profile Accounts'. Below the title, there are 5 items listed in a table. A green arrow points to the 'VIC Master' account, which is the fifth item in the list.

	ACCOUNT ...	BILLING STREET	MASTER FRA...	BIL...	BIL...	BILLING ...	BILLING ...	P...	E...	T...	ACC...
1	<input type="checkbox"/>	Australia Master	1 Pitt Street	NS...	2000	Sydney	Australia				FinM...
2	<input type="checkbox"/>	JK Master	Australia Master				AU				IUser
3	<input type="checkbox"/>	NSW Master	9 Commercial Road	Australia Master	NS...	2208	Kingsrove	Australia			FinM...
4	<input type="checkbox"/>	SA Master	Australia Master								U
5	<input type="checkbox"/>	VIC Master	26 Collins Street	Australia Master	VIC	3000	Melbourne	AUSTRALIA			fmanv

## 3. Scroll to the Other Information section to find the Configuration Set.

The screenshot shows the 'VIC Master' account details page. The 'Other Information' section is expanded, and the 'Configuration Set' field is highlighted with a green box. The value of the Configuration Set is 'CN-00001'.

**Other Information**

Survey Frequency (Days)	Referrer
Insurance End Date	Source
Initial Contact Date	<b>Configuration Set</b> CN-00001

**System Information**

Created By Loryn Jenkins, 15/08/2018 4:43 PM	Last Modified By Loryn Jenkins, 14/11/2018 1:41 PM
Parent Account	Account Record Type Master Franchise Profile
Account Currency AUD - Australian Dollar	

## To view the Configuration Set

### 1. When the Configuration Set is not empty, click the link to view it.

The screenshot shows the 'VIC Master' account details page. The 'Other Information' section is expanded, and the 'Configuration Set' field is highlighted with a green arrow. The value of the Configuration Set is 'CN-00001'.

**Other Information**

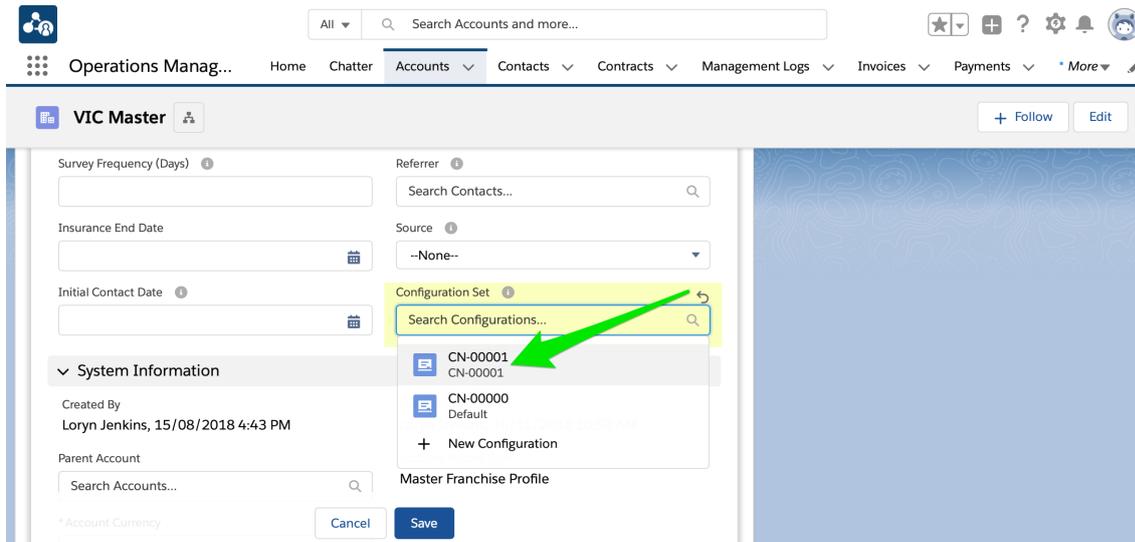
Survey Frequency (Days)	Referrer
Insurance End Date	Source
Initial Contact Date	<a href="#">Configuration Set</a> CN-00001

**System Information**

Created By Loryn Jenkins, 15/08/2018 4:43 PM	Last Modified By Loryn Jenkins, 16/11/2018 10:53 AM
Parent Account	Account Record Type Master Franchise Profile
Account Currency AUD - Australian Dollar	

## To select an existing Configuration Set

1. To select an existing Configuration Set, press the **Edit** button, then choose from the existing Configuration Sets.



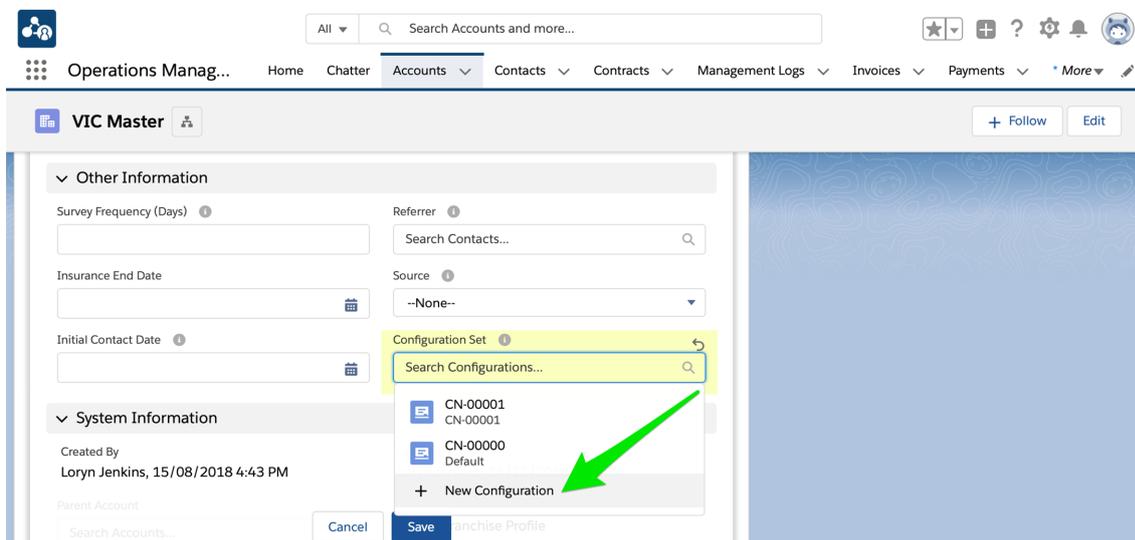
The screenshot shows the 'VIC Master' configuration page. The 'Configuration Set' dropdown menu is open, displaying a search bar and a list of existing configuration sets: 'CN-00001' (with a sub-entry 'CN-00001') and 'CN-00000' (with a sub-entry 'Default'). A green arrow points to the 'CN-00001' entry. The page also includes fields for 'Survey Frequency (Days)', 'Insurance End Date', 'Initial Contact Date', 'Referrer', and 'Source'. The 'System Information' section shows 'Created By: Loryn Jenkins, 15/08/2018 4:43 PM' and 'Parent Account'.



You may need to search for a Configuration Set if it does not immediately appear on the list.

## To create a new Configuration Set

1. When there is no current Configuration Set, **Edit** the field in order to either select an existing one or create a new one.



The screenshot shows the 'VIC Master' configuration page. The 'Configuration Set' dropdown menu is open, displaying a search bar and a list of existing configuration sets: 'CN-00001' (with a sub-entry 'CN-00001') and 'CN-00000' (with a sub-entry 'Default'). A green arrow points to the '+ New Configuration' option at the bottom of the dropdown. The page also includes fields for 'Survey Frequency (Days)', 'Insurance End Date', 'Initial Contact Date', 'Referrer', and 'Source'. The 'System Information' section shows 'Created By: Loryn Jenkins, 15/08/2018 4:43 PM' and 'Parent Account'.

- The new **New Configuration: Master Franchise** dialog box appears. Enter mandatory information and as much other information as you are able, then press **Save**.

New Configuration: Master Franchise

---

Name ⓘ

**Sequence Settings**

Prefix ⓘ  Next Contract Number ⓘ

Padding ⓘ  Version Padding ⓘ

Version Separator ⓘ

**Survey Settings**

Survey Ending (1st Criteria) ⓘ  Survey Greeting ⓘ

Survey Ending (2nd Criteria) ⓘ

**Escalation Settings**

1.Esc Not Closed & Complaint (D,B,W) ⓘ  1.Esc Open&Complaint (Not D,B,W) ⓘ

2.Esc Not Closed & Complaint (D,B,W) ⓘ  2.Esc Open&Complaint (Not D,B,W) ⓘ

Not Closed & Type Enquiry ⓘ  Not Closed & Type Praise,Suggestion ⓘ

- The new **Configuration Set** is displayed in the **Configuration Set** field. Press **Save**.

The screenshot shows the 'VIC Master' account configuration page. The 'Other Information' section is expanded, showing fields for 'Survey Frequency (Days)', 'Insurance End Date', 'Initial Contact Date', 'Referrer', 'Source', and 'Configuration Set'. The 'Configuration Set' field is highlighted in yellow and contains the value 'CN-00002'. A green arrow points to the 'Save' button at the bottom of the form.

### To configure the Configuration Set

- » See “How to configure contract sequence numbering” on page 13
- » See “How to configure escalation of customer feedback” on page 15

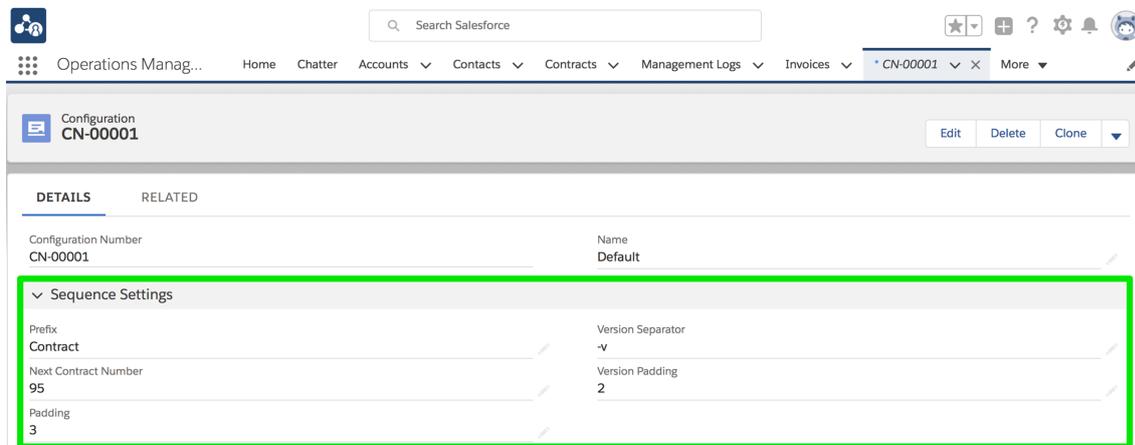
- » See “How to configure contract expiry notifications” on page 16
- » See “How to configure job allocation” on page 17
- » See “How to configure customer matching criteria” on page 18
- » How to configure insurance policy reminders
- » See “How to configure financial syncing” on page 129

# How to configure contract sequence numbering

FranchiseOps supports the configuration of flexible and unique version numbering of contracts. The versioning even includes unique numbers for revisions. The flexibility of this configuration means that you can incorporate an existing version numbering system and version sequence to allow for a smooth transition from your existing manual processes to FranchiseOps-generated contract version numbers.

## To configure contract sequence numbering

1. From the Master Franchise Profile Account's **Configuration Set**, locate the **Sequence Settings** section.



Configuration Number	Name
CN-00001	Default
▼ Sequence Settings	
Prefix Contract	Version Separator .v
Next Contract Number 95	Version Padding 2
Padding 3	

2. Edit the sequence settings as needed. The fields are explained below.

## Field Notes

✓ To create a unique version number of the form  
» *Contract-00100.v01*  
Adjust the values as described below.

- » **Prefix** is a static field. Enter *Contract*
- » **Next Contract Number** describes the next number in the contract sequence. Enter *100*
- » **Padding** describes the number of digits in the contract number. Enter *5*
- » **Version Separator** describes which characters are inserted between the contract number and the version. Enter *.v*
- » **Version Padding** describes the number of digits in the version number. Enter *2*

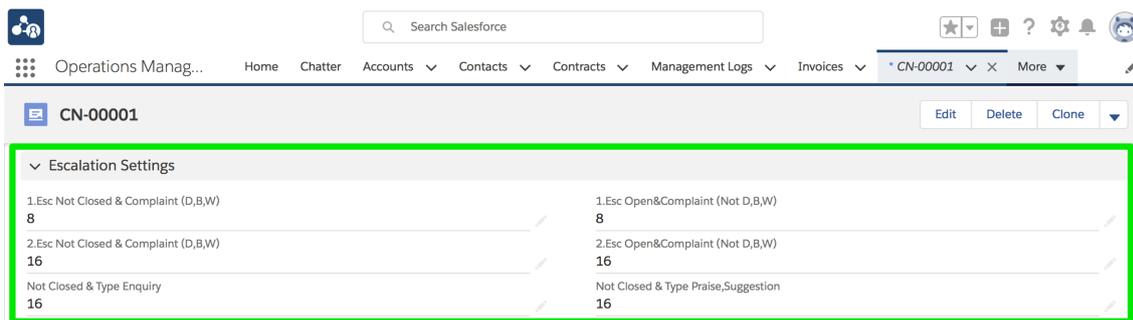
You can use this system to customize your contract sequence numbering.

# How to configure escalation of customer feedback

After a certain number of hours, open Customer Feedback records can trigger notification emails to the manager of the responsible person. You can configure the number of hours before an escalation email is sent.

## To configure the escalation period

1. From the Master Franchise Profile Account's **Configuration Set**, scroll down to the **Escalation Settings** section.



The screenshot shows the Salesforce interface for a Configuration Set (CN-00001). The 'Escalation Settings' section is highlighted with a green border. It contains a table with two columns of settings, each with a condition and a number of days.

Condition	Days	Condition	Days
1.Esc Not Closed & Complaint (D,B,W)	8	1.Esc Open&Complaint (Not D,B,W)	8
2.Esc Not Closed & Complaint (D,B,W)	16	2.Esc Open&Complaint (Not D,B,W)	16
Not Closed & Type Enquiry	16	Not Closed & Type Praise,Suggestion	16

2. Set the number of days until each notification event.



The fields named with a 1 and 2 represent the first and second notifications the described condition. Each other condition has only a single notification.

3. Press **Save**.

# How to configure contract expiry notifications

The system is configured to send contract expiry notification emails to appropriate parties a certain number of days before the expiry of a franchise contract.

## To configure contract expiry notifications

1. From the Master Franchise Profile Account's **Configuration Set**, scroll down to the **Contract Notification** section and set the **Expiry Notification** field to the number of days prior to contract expiry, then press **Save**.

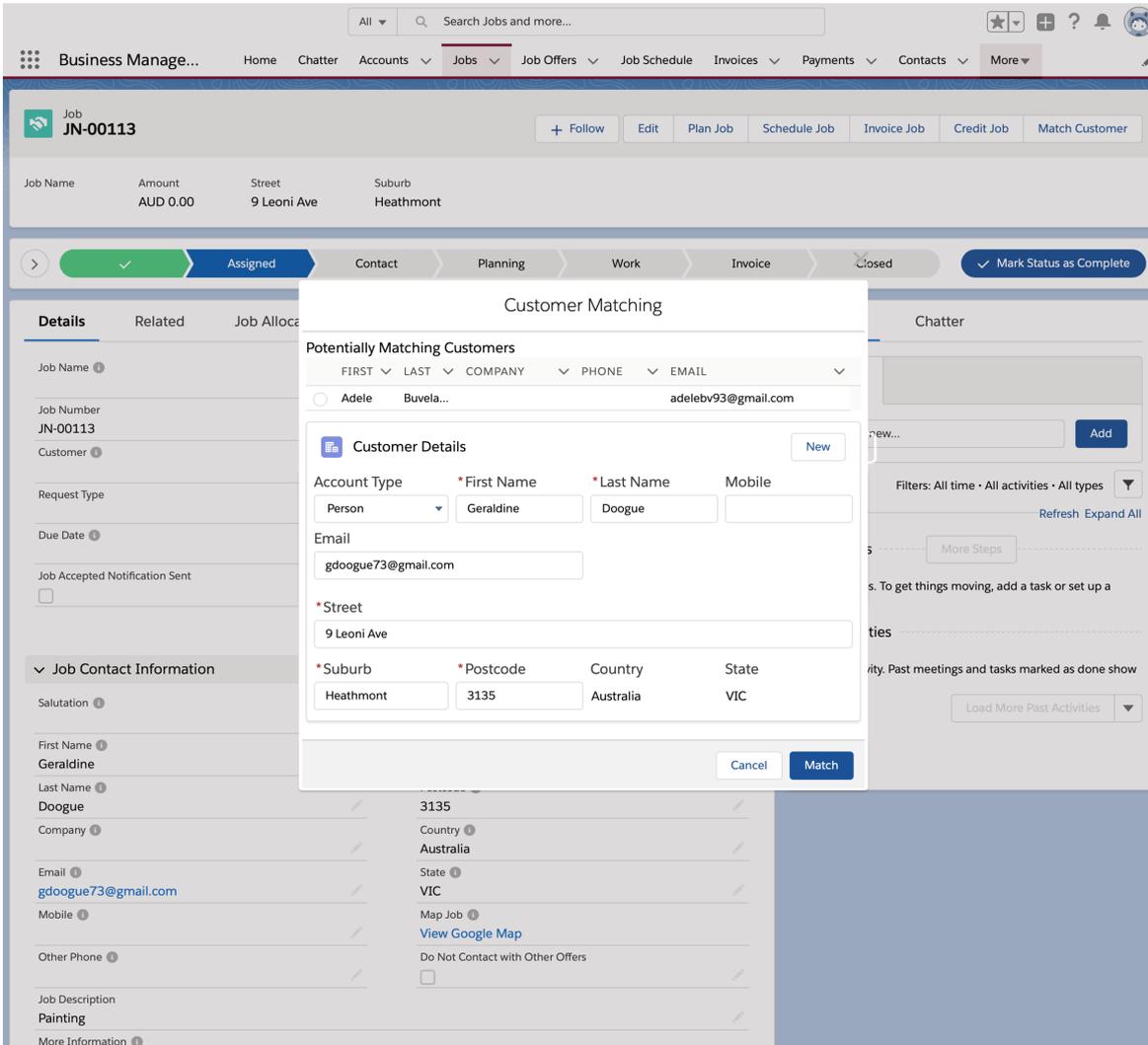
The screenshot shows the Salesforce configuration page for a Contract Notification (CN-00001). The page is divided into several sections. The 'Escalation Settings' section contains six input fields with values: 8, 8, 16, 16, 16, and 16. The 'Contract Notification' section is highlighted in yellow and contains one input field labeled 'Expiry Notification' with the value '90'. A green box highlights the 'Expiry Notification' field, and a green arrow points to the 'Save' button. The 'Save' button is also highlighted in blue. The 'Job Allocation Settings' section is partially visible at the bottom.

# How to configure job allocation

To understand how to configure the Job Allocation section of the Configuration Set, Working with Job Allocation.

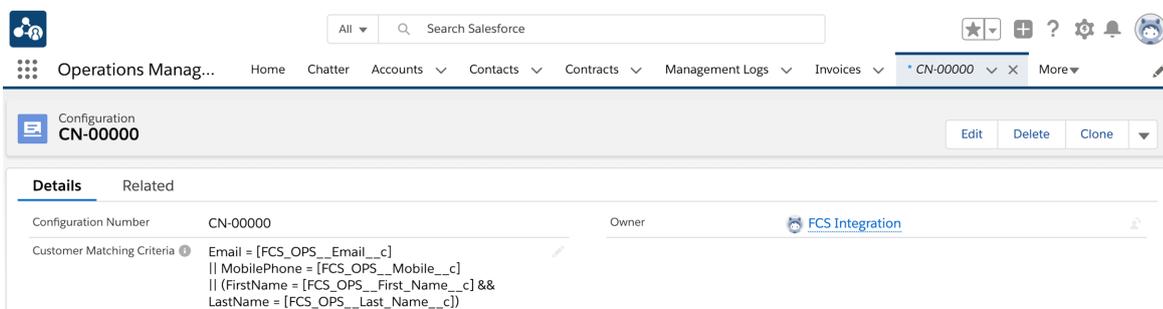
# How to configure customer matching criteria

Using the Match Customer function, franchisees can match Job contact details against details stored within their existing Contacts.



## Configuration

What constitutes a match is controlled by the Customer Match Criteria on the Master Franchise Profile Account's Configuration record.



The notation consists of

- » Contact field(LHS) = Job field(RHS)
- » Logical operators && (and) || (or)
- » Grouping operators (parentheses)

#### **For more information**

- » To find field names for Salesforce built-in objects (e.g. Contact record),
  - » See [Salesforce Fields Reference](#)
- » To find field names for Operations Management custom objects,
  - » See “How to identify a Field API Name” on page 239

# How to configure job satisfaction surveys

Job surveys are sent to selected customers. Job surveys are limited to a maximum survey frequency of 20% of jobs.

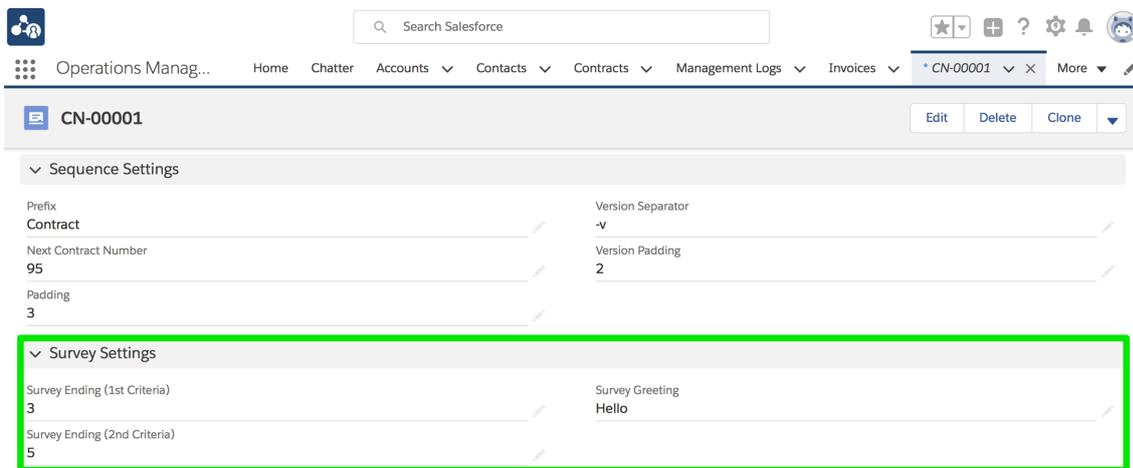
The means of limiting the maximum survey frequency is to only select jobs whose job numbers end in one of two configurable digits. For example, the digits 3 and 5 may be selected as the survey digits. Therefore jobs JN-00243 and JN-00245 will be selected as possible candidates for surveying, whereas jobs JN-00241 and JN-00247 will not be selected.

For a customer to receive a job survey

- » the job must be closed
- » the customer must have a personal account
- » the customer account must have an email address
- » the customer must not have opted out of receiving emails or surveys
- » the job number must match configurable “survey digits”

To configure which job numbers are selected for surveying

1. From the Master Franchise Profile Account’s **Configuration Set**, scroll down to the **Survey Settings** section.



The screenshot shows the Salesforce interface for a Configuration Set named 'CN-00001'. The 'Survey Settings' section is highlighted with a red box. The settings are as follows:

Sequence Settings	
Prefix	Version Separator
Contract	-v
Next Contract Number	Version Padding
95	2
Padding	
3	

Survey Settings	
Survey Ending (1st Criteria)	Survey Greeting
3	Hello
Survey Ending (2nd Criteria)	
5	

2. Set the **Survey Ending (1st Criteria)** and **Survey Ending (2nd Criteria)** fields each to a single digit (0–9).

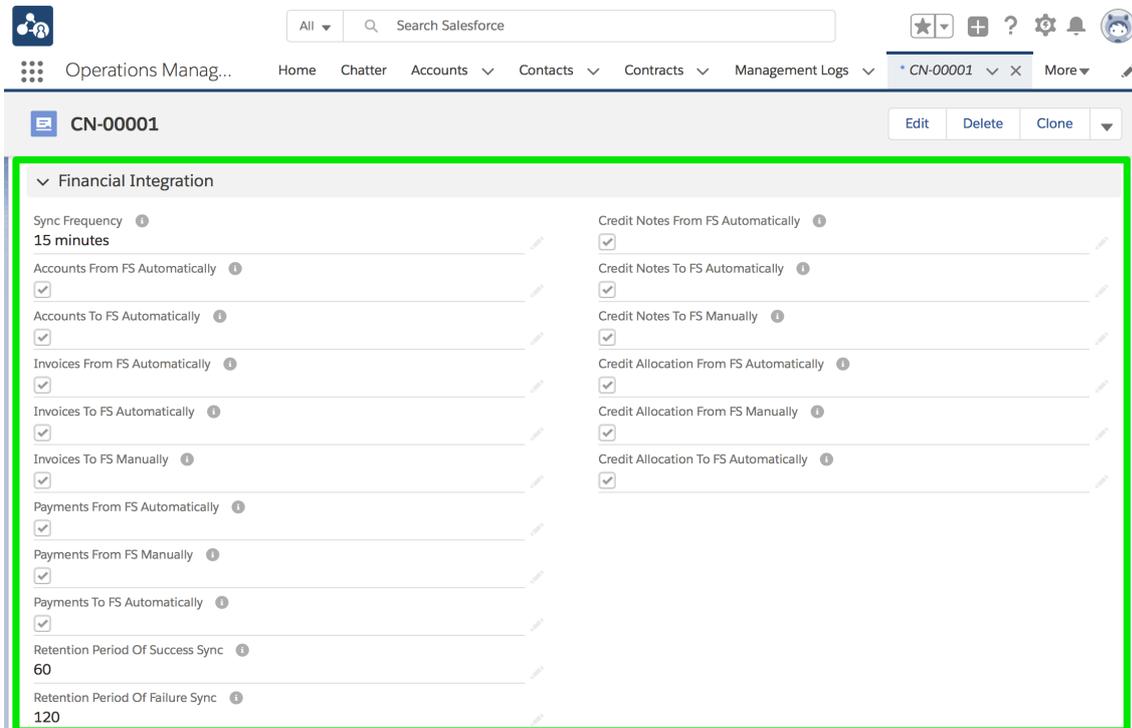
These settings will cause jobs whose numbers end in either of these digits to be considered for receipt of a job survey.

# How to configure financial syncing

The Sync configuration for the Master Franchise controls the frequency and scope of records that are synced for the Master Franchise and all franchisees.

## To configure automatic syncing

1. From the Master Franchise Profile Account's **Configuration Set**, locate the **Financial Integration** section.



2. Ensure that each of the financial records you know need to be synced actually are being synced.
3. Determine whether one-way or two-way syncing is required and set the fields in keeping with the desired policy.
4. Ensure the Sync Frequency is set at an appropriate level of granularity. This will control the frequency with which syncs from Xero to Salesforce occur.



Consult the on-screen field notes for a definition of each setting shown in the above image.



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



# CHAPTER 4

## Working with Products

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# How to create a product

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



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

## To add a new product:

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

New Product: Territory

**Product Information**

* Product Name	Platinum	Active	<input checked="" type="checkbox"/>
Product Code	1007	Product Family	Territory
* Product Currency	AUD - Australian Dollar	Product Classification	--None--
Product Description	Platinum-level product includes income guarantee.		
	Product Classification Level	Level 3	

The new product is now available for use within territories.



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

# CHAPTER 5

## Working with Territories

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# How to create a master territory

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

## To create a new master territory

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

New Territory: Master Franchise

### Information

*Territory Name Master Territory - South NZ	Franchise Search Accounts... <input type="text"/>
*Status Owned	Territory Owner Search Contacts... <input type="text"/>
Sub Status --None--	Country <input type="text"/> New Zealand
*Product Gold Territory	State <input type="text"/> --None--
Type Metro	Territory Number TERR-30001
Active <input type="checkbox"/>	

### Sale Information

Buy Back Conditions <input type="text"/>	Resale Price <input type="text"/>
Conditions of Resale <input type="text"/>	Price Considerations <input type="text"/>
	Potential Resale Inclusions <input type="text"/>

### System Information

Master Territory Master Territory - NZ	Owner REC Administrator
	Record Type Master Franchise

## Field Notes

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

# How to create a franchise territory

A franchise territory is managed within Operations Management. A franchise territory is the child of a master territory and has its locations defined by a combination of suburb names and postcodes.



It is important to create **Territories** and **Territory Locations** covering all job addresses. If a job address does not match any given **Territory Location** owned by an active **Territory** belonging to the Master Franchise Profile Account then job allocation will not create job potentials and therefore will not allocate jobs to franchisees.

## To create a franchise territory ready for sale

1. From the **Territories** list, press **New**.  
The **New Territory** dialog box appears.
2. Select the **Franchise** record type, and press **Next**.

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

New Territory: Franchise

#### Information

*Territory Name Territory - Albany (NZ)	Franchise Search Accounts...
*Status Unowned	Territory Owner Search Contacts...
Sub Status --None--	Country New Zealand
*Product Bronze Territory	State --None--
Type Metro	Territory Number TERR-20001
Active <input type="checkbox"/>	

#### Sale Information

Buy Back Conditions	Resale Price
Conditions of Resale	Price Considerations
	Potential Resale Inclusions

#### System Information

Master Territory Master Territory - NZ	Owner REC Administrator
	Record Type Franchise

Cancel Save & New Save

#### Field Notes

- » Enter the `Territory Name` as the primary user identifier for this record.
- » Set `Status` to `Unowned` as when first configuring the territory for sale.
- » Generally leave `Substatus` as `--None--` when first configuring the territory for sale.
- » Select the appropriate `Product` based on the territory's classification.
- » Select the appropriate `Type` for this territory. `Type` is used to assist sales representatives in searching for and identifying appropriate territories for customers.

- » Leave the `Franchise` and `Territory Owner` fields empty when configuring the territory for sale.
- » Set the `Country` (and `State`, if appropriate).
- » Enter a `Territory Number` as a territory reference.
- » Use the fields within **Sale Information** as described in the on-screen field help.
- » Select the `Master Territory` to which this territory belongs.
- » Check the `Active` field. `Active` indicates that the territory record is complete and ready for use. (`Inactive` indicates the territory is still being set up or has been superseded.)

## To set the franchise location

1. From the **Territory**, select the **Related** tab.
2. From **Territory Locations**, press **New**.  
The **New Territory Location** dialog box appears.
3. Complete the details as appropriate.

New Territory Location

---

**Information**

<p>*Territory Location Name <input type="text" value="Albany (NZ)"/></p> <p>*Suburb <input type="text" value="Albany"/></p> <p>*Postcode <input type="text" value="0632"/></p> <p>*Country <small>?</small> <input type="text" value="New Zealand"/></p> <p>State <small>?</small> <input type="text" value="--None--"/></p>	<p>*Territory <input type="text" value="Territory - Albany (NZ)"/></p> <p>Location Latitude <input type="text"/></p> <p>Longitude <input type="text"/></p>
--	--

## Field Notes

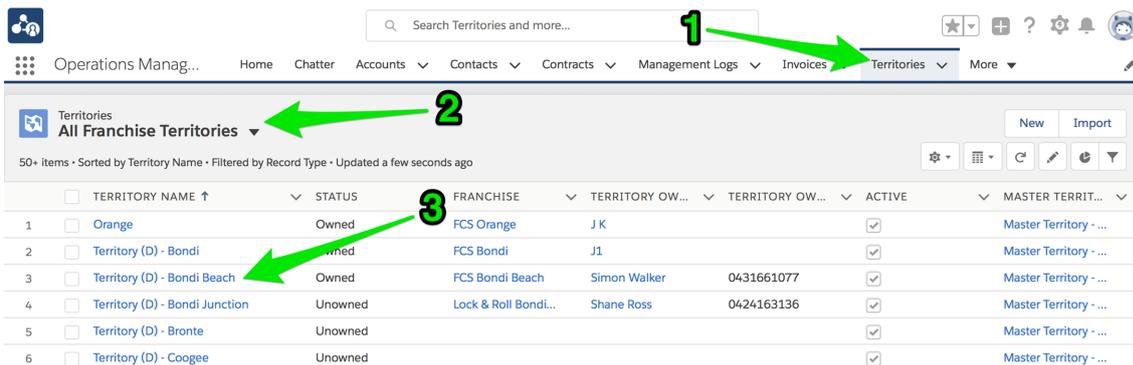
- » Enter a `Territory Location Name` that will identify this territory.
- » Enter a `Suburb` name that describes this location.

- » Enter a `Postcode` that describes this location.
- » Select the `Country` (and `State`, if appropriate).
- » Optionally enter `Latitude` or `Longitude` identifiers.

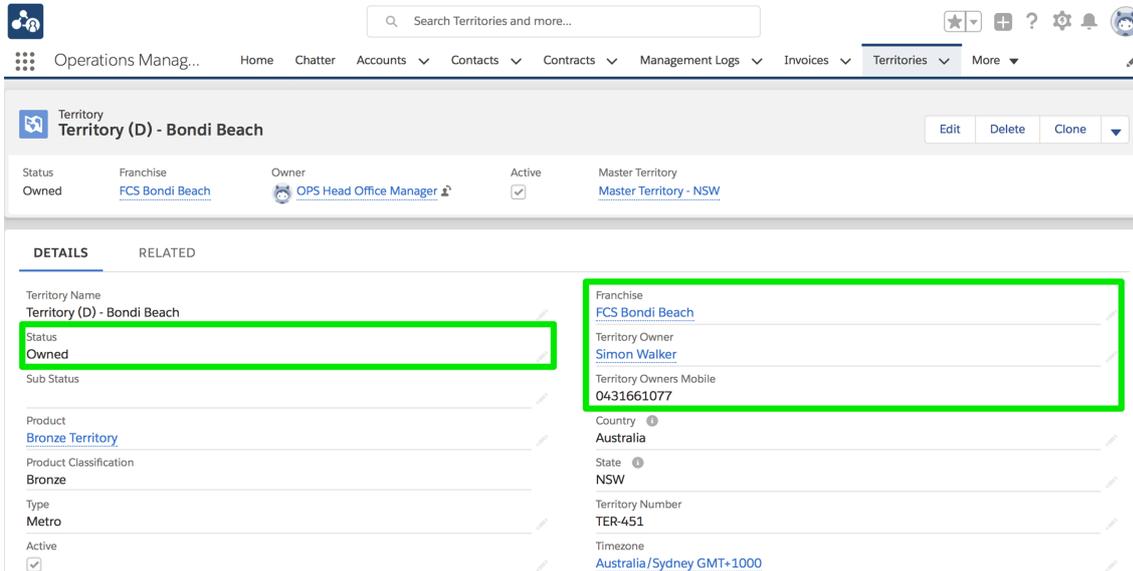
# How to register the owner and operator of a territory

To add a franchise owner and a franchise profile account as the operator of a Territory

1. Ensure the Franchise Profile Account has been correctly created. Refer to manual **Operations Management User Guide** topic “How to create a franchise profile account.”
2. From the Salesforce **Territories** tab, open the appropriate **Territory**.



3. Set the key fields on the Territory, including the Franchise, Territory Owner and Status, then **Save** the record.

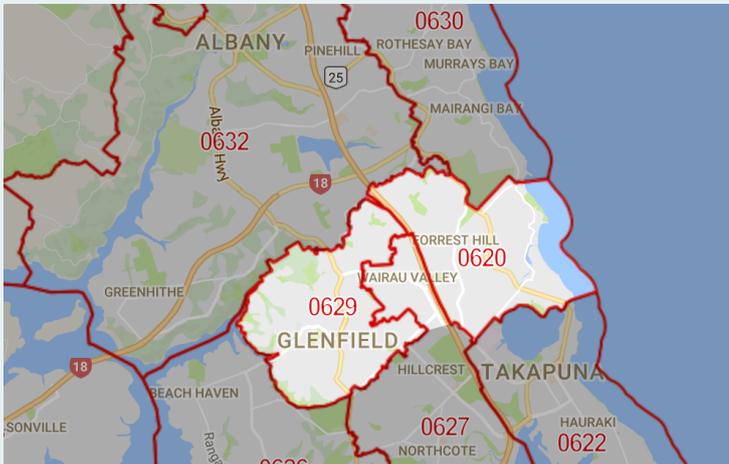


# How to split or merge franchise territories

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



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



Here is how the territory is defined in Operations Management

**Territory - Upper North Shore** [Edit] [Delete] [Clone]

Status: Unowned | Franchise: | Owner: REC Administrator | Active:  | Master Territory: Master Territory - NZ

**RELATED**

**Territory Locations (5)** [New]

TERRITORY LOCATION NAME	SUBURB	POSTCODE	STATE
<a href="#">0629-Glenfield</a>	Glenfield	0629	[Dropdown]
<a href="#">0627-Wirau Valley</a>	Wirau Valley	0627	[Dropdown]
<a href="#">0620-Forrest Hill</a>	Forrest Hill	0620	[Dropdown]
<a href="#">0620-Sunnynook</a>	Sunnynook	0620	[Dropdown]
<a href="#">0620-Milford</a>	Milford	0620	[Dropdown]

[View All](#)

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

## To split a territory

1. Create the new territory or territories. See "How to create a franchise territory" on page 28.
2. Move each **Territory Location** record from the current territory to its new territory. See "To move a Territory Location record" on the next page.

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

## To move a Territory Location record

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

The screenshot shows the Salesforce interface for a Territory named "Territory - Upper North Shore". The page displays a list of "Territory Locations (5)". The table has columns for Territory Location Name, Suburb, Postcode, and State. The first row is "0629-Glenfield". A green arrow labeled "1" points to the dropdown menu icon for the first row. A second green arrow labeled "2" points to the "Edit" button in the dropdown menu for the first row.

Territory Location Name	SUBURB	POSTCODE	STATE
<a href="#">0629-Glenfield</a>	Glenfield	0629	
<a href="#">0627-Wirau Valley</a>	Wirau Valley	0627	
<a href="#">0620-Forrest Hill</a>	Forrest Hill	0620	
<a href="#">0620-Sunnynook</a>	Sunnynook	0620	
<a href="#">0620-Milford</a>	Milford	0620	

The **Edit** dialog box appears.

Edit 0629-Glenfield

The "Edit 0629-Glenfield" dialog box contains the following fields:

- Territory Location Name:** 0629-Glenfield
- Suburb:** Glenfield
- Postcode:** 0629
- Country:** New Zealand
- State:** --None--
- Territory:** Territory - Upper North Shore
- Product Classification:** Bronze
- Location:** (empty field)
- Latitude:** (empty field)
- Longitude:** (empty field)

**System Information**

Created By REC Administrator, 26/03/2018 4:36 PM	Last Modified By REC Administrator, 26/03/2018 4:49 PM
---	---

Buttons: Cancel, Save & New, Save

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

Edit 0629-Glenfield

---

<b>*Territory Location Name</b> <input type="text" value="0629-Glenfield"/>	<b>*Territory</b> <input type="text" value="Territory - Glenfield (NZ)"/>
<b>*Suburb</b> <input type="text" value="Glenfield"/>	<b>Product Classification</b> <b>Bronze</b>
<b>*Postcode</b> <input type="text" value="0629"/>	<b>Location</b> Latitude <input type="text"/>
	Longitude <input type="text"/>
<b>*Country</b> ⓘ <input type="text" value="New Zealand"/>	
<b>State</b> ⓘ <input type="text" value="--None--"/>	

**System Information**

Created By REC Administrator, 26/03/2018 4:36 PM	Last Modified By REC Administrator, 26/03/2018 4:49 PM
---	---

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

### To add a split Territory Relationship record

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

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

New Territory Relationship

---

**Information**

Territory Relationship Number

\*New Territory  
Territory - Glenfield (NZ) ×

\*Type  
Split ▾

\*Original Territory  
Territory - Upper North Shore ×

\*Date  
27/03/2018 📅

5. Now press **Save**.



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

### To merge territories

1. Note the territory that is the merge target. Create it if necessary.
2. Go to the territory containing the Territory Location record.
3. Move the Territory Location record. See “To move a Territory Location record” on page 34.
4. Record the merge using the **Replaced By** relationship section.



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

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

# CHAPTER 6

## Working with Users

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How to configure a user as a franchise employee .....	48
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# Overview of User Types

Capabilities	Recruitment	Head Office Operations	Franchise Owner	Franchise Employee	Partner Portal
Chatter	<input checked="" type="checkbox"/>				
Learning Management System	<input checked="" type="checkbox"/>				
Access shared Libraries - file sharing	<input checked="" type="checkbox"/>				
Create Tasks, Events and Emails from the Activity Panel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Apply an Activity List to a Record		<input checked="" type="checkbox"/>			
Create personal Dashboards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Create personal Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Create Management Logs		<input checked="" type="checkbox"/>			
Complete an Audit		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Add Expenses to a Franchise Profile Account		<input checked="" type="checkbox"/>			
Bulk Invoice Franchise Agreement Fees & Expenses		<input checked="" type="checkbox"/>			
View customer Leads & Jobs		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Create a new Franchise Profile Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Receive Job Offers - accept or decline offers			<input checked="" type="checkbox"/>		
View all Job & Customer details - desktop and mobile			<input checked="" type="checkbox"/>		
View assigned Job & Customer details - desktop and mobile			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Plan a Job - create line items with hours and value			<input checked="" type="checkbox"/>		
Submit a formal Quote to a customer			<input checked="" type="checkbox"/>		
Schedule customer's work into the team calendar			<input checked="" type="checkbox"/>		
View Event & Customer details - desktop and mobile			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Capabilities	Recruitment	Head Office Operations	Franchise Owner	Franchise Employee	Partner Portal
Raise an Invoice and send to the customer			<input checked="" type="checkbox"/>		
View Franchise Sales Leads	<input checked="" type="checkbox"/>				
Convert Leads to Opportunities	<input checked="" type="checkbox"/>				
Reserve a Territory / Marketing Zone / Site	<input checked="" type="checkbox"/>				
Set a price on a Territory / Marketing Zone / Site	<input checked="" type="checkbox"/>				
View and Manage Sales Pipeline	<input checked="" type="checkbox"/>				
Run Reports & View Dashboards for Sales Data	<input checked="" type="checkbox"/>				
Draft an initial Franchise Agreement	<input checked="" type="checkbox"/>				

# How to create a user

You will need to create a user account for head office users, franchise owners and their employees who use Operations Management.



Refer to [Salesforce documentation on User Management](#) to learn how to create a new user in Salesforce.

## To add a user

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

Field	Head Office User	Franchise Owner	Franchise Employee
User License	<i>Salesforce Platform</i>	<i>Salesforce Platform</i>	<i>Salesforce Platform</i>
Role	Appropriate for the Master Franchise	Appropriate for the Master Franchise	Appropriate for the Master Franchise
Profile	Select from one of the following <ul style="list-style-type: none"> <li>» <i>OPS Field Manager</i></li> <li>» <i>OPS Compliance Manager</i></li> <li>» <i>OPS Operations Manager</i></li> <li>» <i>OPS Finance Manager</i></li> <li>» <i>OPS Head Office Manager</i></li> <li>» <i>OPS Administrator</i></li> </ul>	<i>OPS Franchise Owner</i>	<i>OPS Franchise Employee</i>
Permission Set License Assignment	<i>Orders Platform</i>	N/A	N/A

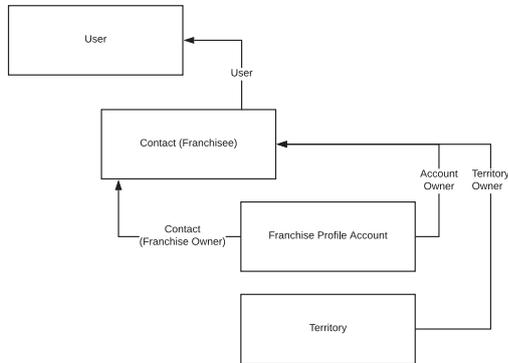
Field	Head Office User	Franchise Owner	Franchise Employee
Managed Packages	<p>For all users</p> <ul style="list-style-type: none"> <li>» <i>Base</i></li> <li>» <i>FranchiseOps</i></li> </ul> <p>Then select optional components</p> <ul style="list-style-type: none"> <li>» <i>SMS</i></li> </ul>	<p>For all users</p> <ul style="list-style-type: none"> <li>» <i>Base</i></li> <li>» <i>FranchiseOps</i></li> </ul> <p>Then select optional components</p> <ul style="list-style-type: none"> <li>» <i>SMS</i></li> </ul>	<p>For all users</p> <ul style="list-style-type: none"> <li>» <i>Base</i></li> <li>» <i>FranchiseOps</i></li> </ul> <p>Then select optional components</p> <ul style="list-style-type: none"> <li>» <i>SMS</i></li> </ul>
Permission Set Assignment	<p>One of the following</p> <ul style="list-style-type: none"> <li>» <i>OPS Field Manager Access</i></li> <li>» <i>OPS Compliance Manager Access</i></li> <li>» <i>OPS Operations Manager Access</i></li> <li>» <i>OPS Finance Manager Access</i></li> <li>» <i>OPS Head Office Manager Access</i></li> <li>» <i>OPS Administrator Access</i></li> </ul> <p>then optionally select from</p> <ul style="list-style-type: none"> <li>» <i>OPS Contract Management</i> if the user needs to manage contracts</li> <li>» <i>FIN Integration User Access</i> if the user is to have access to Financial Integration features</li> <li>» <i>OPS Nextdoc User</i> if the user is licensed to generate documents</li> </ul>	<ul style="list-style-type: none"> <li>» <i>FIN Integration User Access</i> if the user is to have access to Financial Integration features</li> <li>» <i>OPS Franchise Owner Access</i></li> <li>» <i>OPS Nextdoc User</i></li> </ul>	<ul style="list-style-type: none"> <li>» <i>OPS Franchise Employee Access</i></li> <li>» <i>OPS Nextdoc User</i> if the user is to generate Quotes or Invoices</li> </ul>

Field	Head Office User	Franchise Owner	Franchise Employee
Permission Set Assignment	<p>If the Managed Package <i>FranchiseOps</i> has been selected, then you may optionally assign</p> <ul style="list-style-type: none"> <li>» <i>OPS Audit User</i> if the user needs to perform audits</li> </ul> <p>If the Managed Package <i>FranchiseOps</i> has been selected and the Permission Set Assignment is <i>OPS Administrator Access</i>, then you may optionally assign</p> <ul style="list-style-type: none"> <li>» <i>OPS Audit Admin</i> if the user needs to create new audit schedules</li> </ul>		

# How to configure a user as franchise owner

When someone logs into Salesforce, the login is evaluated against a user profile. For the user profile to access the franchise owner's data, the Contact, Franchise Profile Account and Territory records need to be appropriately configured.

The illustration shows the relationships needed to configure a user as a franchise owner.



The following procedure configures the user as a franchise owner and causes them to appear as a resource on the Job Calendar. To exclude them from the Job Calendar, See “How to prevent an employee from appearing as a job calendar resource” on page 51.

## To configure a user as a franchise owner

1. Create a user profile configured for a franchise owner.
  - a. To create the user, follow Salesforce instructions.
  - b. To configure the user profile for a franchise owner, See “How to create a user” on page 40.



In the below example, Simon Walker is the name of the new franchise owner user.

2. On the **Franchise Profile Account**, select the franchise owner's User as the Account Owner.

The screenshot shows the 'Account' page for 'FCS Ringwood'. The 'Details' tab is selected, displaying a table with the following information:

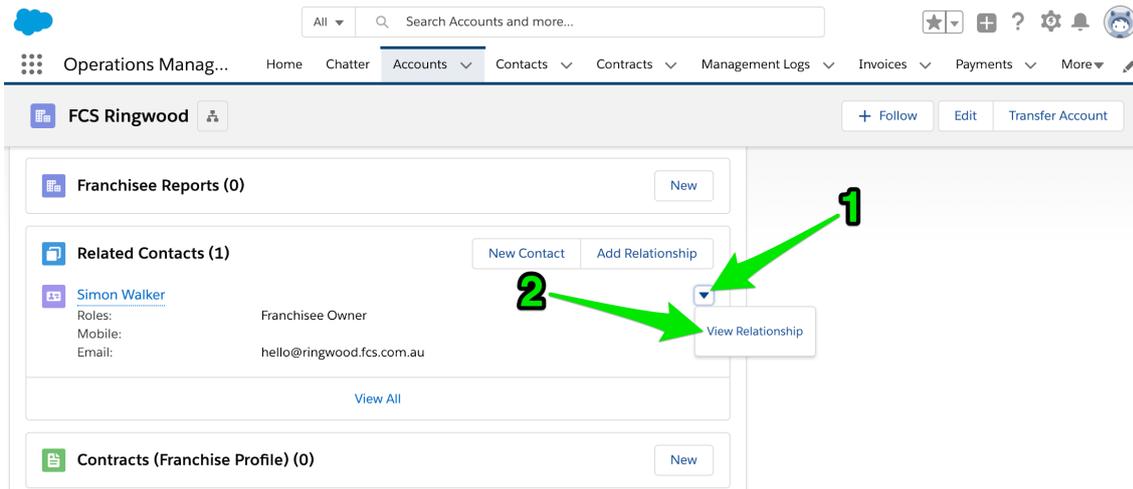
Account Name	Account Owner
FCS Ringwood	Simon Walker
Master Franchise VIC MASTER	Email hello@ringwood.fcs.com.au
Status Active	Phone

Other visible elements include the 'Billing Address' (1/54 Wantima Road, Ringwood, 3134, VIC, Australia), 'Status' (Active), and 'Connection Status' (Disconnected).

3. From the **Account Related** tab, scroll down to the **Contact** section and press **New Contact**. Select the *Franchise Contact* type, then complete the **New Contact: Franchise Contact** form.

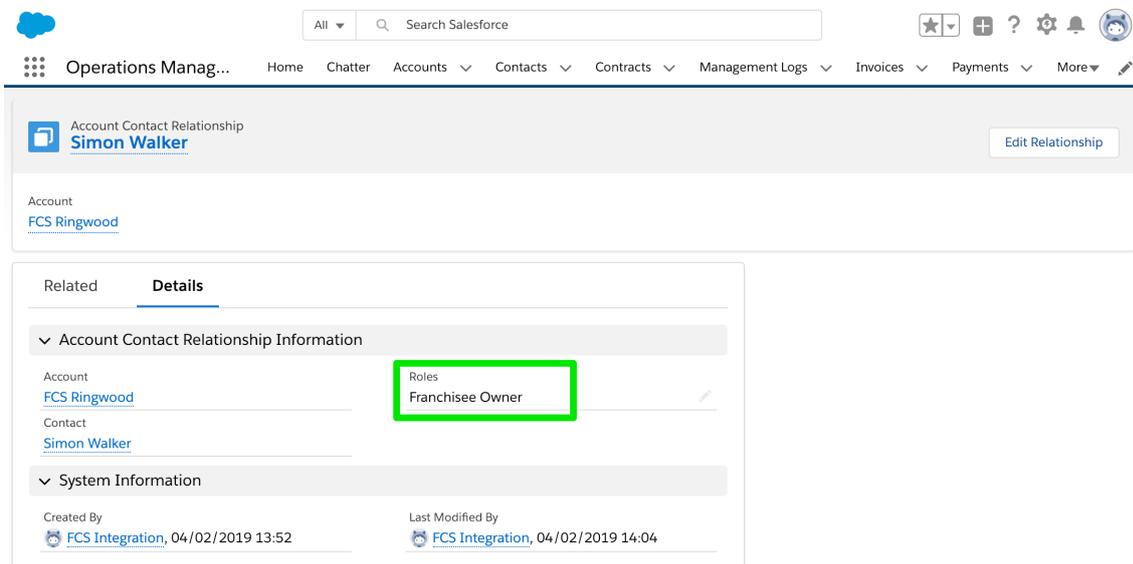
The screenshot shows the 'Account Related' tab for 'FCS Ringwood'. The 'Related Contacts (0)' section is highlighted with a green arrow pointing to the 'New Contact' button. Other sections visible include 'Assets (0)', 'Assets Register (0)', 'Franchisee Reports (0)', and 'Contracts (Franchise Profile) (0)'. The 'Activity Lists' section is also visible on the right side of the page.

4. From the **Related Contacts** section, select **Edit** and then **View Relationship**.



The **Account Contact Relationship** page displays.

5. Set Roles to *Franchise Owner*.



6. From the **Contact**, set the franchise owner User record as the Contact Owner.

The screenshot shows the Salesforce interface for a Contact record. At the top, there is a search bar and navigation tabs for Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, Payments, Expenses, and More. The contact details for Simon Walker are displayed, including Account Name (FCS Bondi Beach), Email (simon.walker@gmail.com), and Contact Owner (Simon Walker). The 'Contact Owner' field is highlighted with a green box. The 'DETAILS' tab is active, showing fields for Name, Account Name, Title, Reports To, Birthdate, Status, Phone, Home Phone, Mobile, Fax, and Email. The 'ACTIVITY' tab is also visible, showing a 'Log a Call' button and an activity timeline.

7. Set the **ContactStatus** to *Active*.

8. Also set the **Contact's User** field to the franchise owner's User record.

The screenshot shows the same Salesforce interface as above, but with the 'User' field in the 'Franchise Employee Information' section highlighted with a green box. The 'Status' field is set to 'Active'. The 'DETAILS' tab is active, showing fields for Name, Account Name, Title, Reports To, Birthdate, Status, Address Information, Marketing Information, and Franchise Employee Information. The 'ACTIVITY' tab is also visible, showing a 'Log a Call' button and an activity timeline with several entries.

9. Set the **Contact's** Calendar Alias to an appropriate value.

Operations Manag... Home Chatter Accounts Contacts Contracts Management Logs Invoices Payments Expenses Jobs Job Offers

Contact  
**Simon Walker**

Mailing Address Other Address

Marketing Information

Preferred Communication Channel Unsubscribe  
SMS Unsubscribe

Franchise Employee Information

Hourly Cost Accepts Reference Calls  
Drivers Licence Number FAC  
Licence Number FAC Since  
User FAC Nomination  
Simon Walker Calendar Colour  
Calendar Alias  
SW

10. On the **Territory**, select the franchise owner's User as the Territory Owner.

Operations Manag... Home Chatter Accounts Contacts Territories More

Territory  
**Ringwood**

Status Owned Franchise FCS Ringwood Owner FCS Integration Active Master Territory VIC MASTER

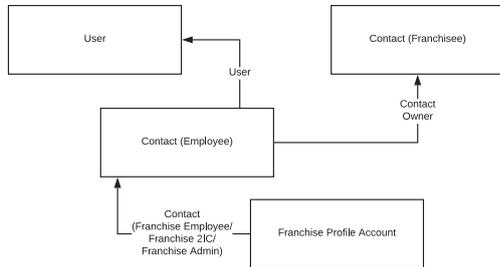
Details Related

Territory Name Franchise  
Ringwood FCS Ringwood  
Status Owned Territory Owner  
Owned Simon Walker

The franchise owner user now has access to all data in the Franchise Profile Account.

# How to configure a user as a franchise employee

The illustration shows the relationships needed to configure a user as a franchise employee.



The following procedure configures the user as a franchise employee and causes them to appear as a resource on the Job Calendar. To exclude them from the Job Calendar, See “How to prevent an employee from appearing as a job calendar resource” on page 51.

## When you add a franchise employee user

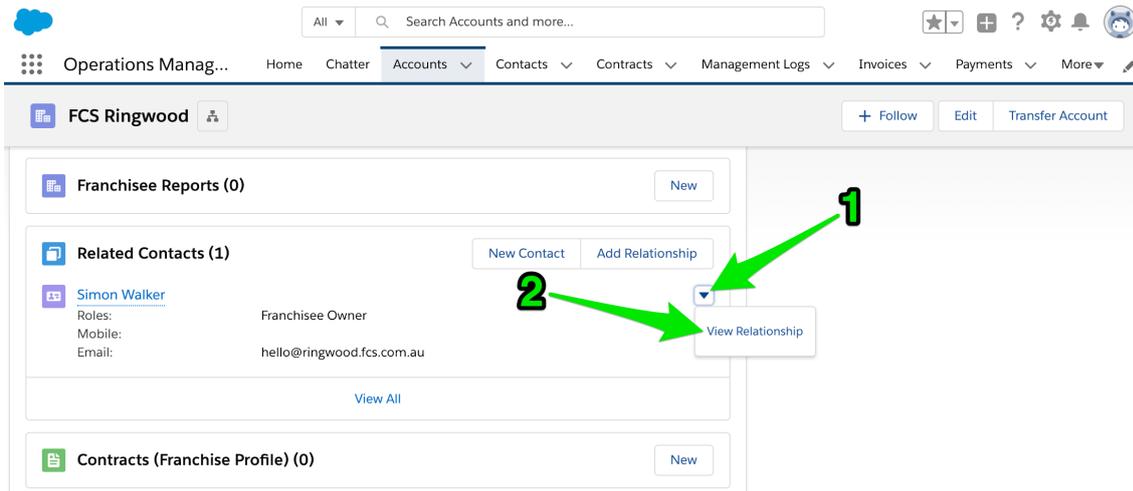
1. Create a user profile configured for a franchise employee.
  - a. To create the user, follow Salesforce instructions.
  - b. To configure the user profile for a franchise employee, See “How to create a user” on page 40.



In the below example, Simon Walker is the name of our franchise owner user and James Walker the name of his new employee.

2. If there is no matching **Contact** record, from the Franchise Profile Account’s **Related** tab, scroll down to the **Related Contacts** section and press **New Contact**. Choose the *Franchise Contact* type, then complete the **New Contact: Franchise Contact** form and press **Save**.

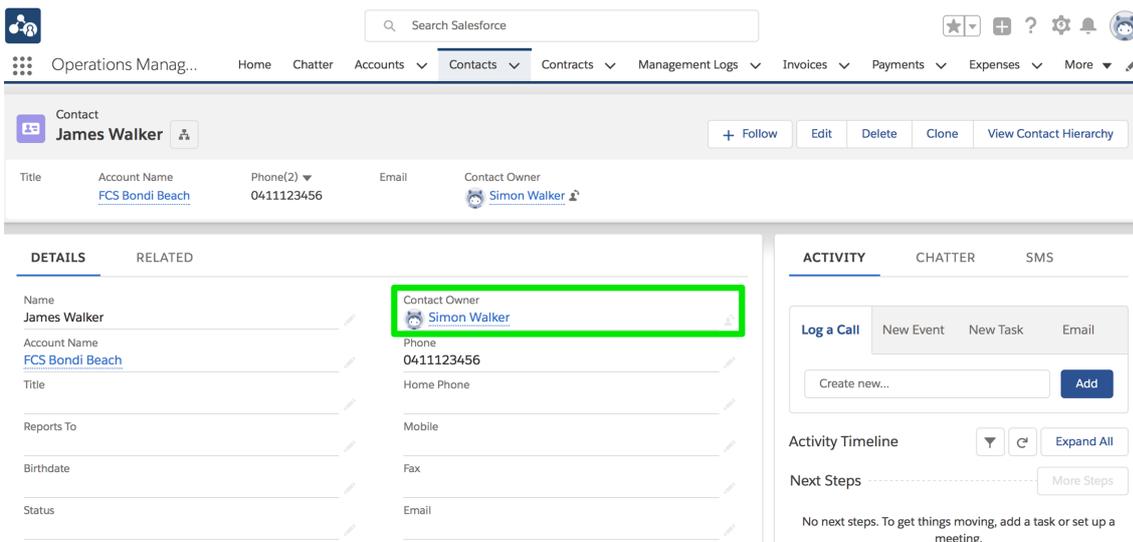
3. From the **Related Contacts**, select **Edit** and then **View Relationship**.



4. Set the **Role** to one of the following:

- a. *Franchise Employee*
- b. *Franchise 2IC*
- c. *Franchise Admin*

5. On the **Contact**, set the franchise owner user as the **Contact Owner**.



6. Set the **Contact Status** to *Active*.

## 7. Connect the Contact's User field with the franchise employee's user record.

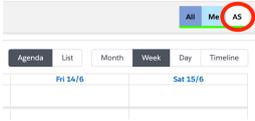
The screenshot shows the Salesforce interface for a Contact record. The contact is named James Walker and is associated with the account FCS Bondi Beach. The contact owner is Simon Walker. The 'DETAILS' tab is active, showing various fields. The 'User' field is highlighted with a green box and contains the name James Walker. The 'Franchise Employee Information' section includes fields for Hourly Cost (\$30.00), Drivers Licence Number, Licence Number, and User (James Walker). Other fields include Contact Owner (Simon Walker), Phone (0411123456), Home Phone, Mobile, Fax, Email, Mailing Address (11 Beach Road, Bondi NSW 2026, Australia), Other Address, Preferred Communication Channel, Unsubscribe, SMS Unsubscribe, Accepts Reference Calls, FAC, FAC Since, and FAC Nomination.

## 8. And set the Contact's Calendar Alias to an appropriate value.

The screenshot shows the Salesforce interface for a Contact record. The contact is named Mr. James Walker. The 'Marketing Information' section includes fields for Preferred Communication Channel, Unsubscribe, and SMS Unsubscribe. The 'Franchise Employee Information' section includes fields for Hourly Cost, Drivers Licence Number, Licence Number, User (James Walker), and Calendar Alias (JW). Other fields include Mailing Address, Other Address, Accepts Reference Calls, FAC, FAC Since, and FAC Nomination.

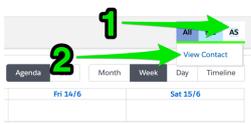
# How to prevent an employee from appearing as a job calendar resource

By default all employees appear as resources on Job Calendar. If you have employees who should not appear as resources on the Job Calendar, it is possible to prevent them from appearing as resources on Job Calendar.

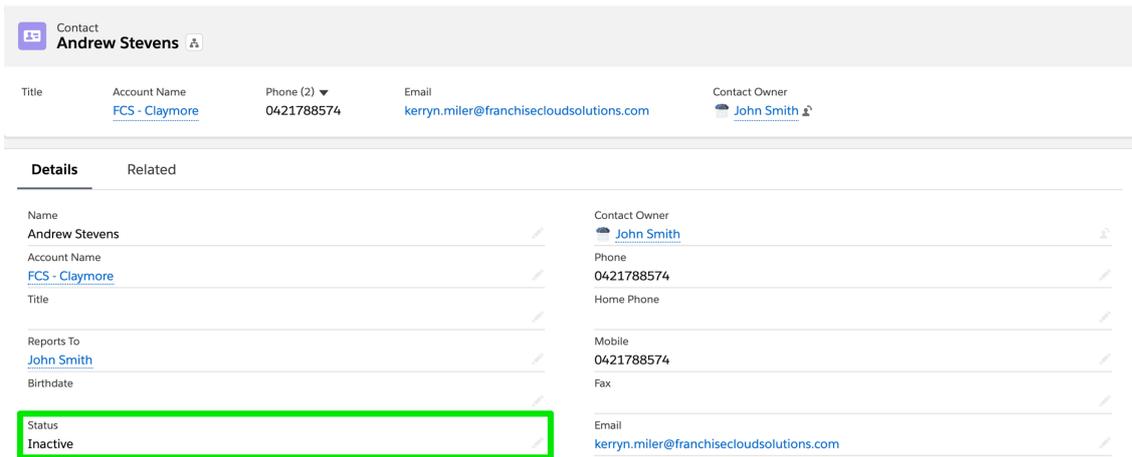


## To prevent an employee from appearing as a resource on Job Calendar

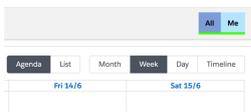
1. On the Job Calendar, right-click on the resource, then select View Contact.



2. On the Contact, set the Status field to *Inactive*.



3. The contact will no longer appear as a resource on the Job Calendar.





# CHAPTER 7

## Working with Job Allocation

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# Configuration potential within the job allocation system



When licensed, Job Allocation is configured especially for your business by our highly trained consultants.

Do not make changes without adequate training. The description that follows is provided to assist you to:

- » understand particular job allocation outcomes
- » appraise you of alternative ways in which the Job Allocation Engine could work for you
- » enable you to communicate with Franchise Cloud Solutions consultants regarding your needs

This description is not provided in lieu of adequate training in the configuration of Job Allocation options and rule sets.

Job Allocation provides an automated rules-based method for distributing jobs that originate with the franchisor website or call center to franchisees. How a job is distributed is highly dependent on the interaction of:

- » job type
- » job location
- » recent daily and weekly volume of job opportunities for each franchisee
- » target volume of daily and weekly job opportunities for each franchisee
- » availability of the franchisee



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

The following description outlines how the Job Allocation System can be configured for your business.

## Duplicate job checking rules

Duplicate jobs can arise through

- » inadvertent multiple submissions of the website form
- » job requests being received by the website and by the call center
- » multiple members of a household or business reporting a job request

In each of these cases, the first job request enters the Job Allocation system. Subsequent jobs are automatically matched via a configured rule set. The system flags all duplicates that match the rule set. Manual review of these duplicates is highly recommended.

- ✓ A typical example of a rule set is
  - » If Last Name and Suburb match, OR
  - » If Email matches, OR
  - » If Mobile matches
  - » Within the last 72 hours

Job Allocation can be configured by

- » customizing the duplicate rule set
- » adjusting the look-back time period in which the rule set is applied

## Job eligibility rules

Franchisees are evaluated according to job eligibility criteria. Job eligibility criteria provide a yes or no choice as to whether a franchisee can be offered the job.

- ✓ A typical example of job eligibility rule set
  - » Franchisee is active
  - » Franchise is available
  - » Franchisee will accept jobs outside own territory

Job eligibility criteria can be specialized to work differently inside and outside their own territory. The number and order of rules being processed can be changed.

## Distance calculation options

Distance can be calculated between the franchisee address and the job address by

- » Straight line (as the crow flies), or
- » By road

The distance of all potential franchisees to the job is calculated using the configured method.

## Exclusiveness of territory

There can be a trade-off between providing a franchisee exclusivity in a territory and providing customers timely service. Job Allocation can support a range of levels of

exclusiveness vs. service.

### **For jobs that originate from the territory owned by the franchisee**

- » At its most exclusive
  - » always be allocated the territory owner
  - » be made never to timeout
  - » provide owned area job offers to a franchise on a 24/7 basis
- » At its least exclusive
  - » offer all reasonable franchisees the job offer simultaneously with the job being allocated to the first to respond
- » Mid-way between these two are policies that
  - » offer a job to the territory owner first (if eligible)
  - » allow the territory owner to accept, reject or ignore the offer
  - » when rejected or expired, offer to next most suitable franchisee

These policies are also affected by job queuing and job throttling controls.

### **Parallel vs. sequential job offers**

Following a first attempt to offer a job to a territory owner, subsequent offers can be distributed sequentially or in parallel.

- » Sequential job offers are distributed one at a time to the next highest ranked franchise first, and offered to each subsequent franchise if rejected or the job offer times out.
- » Parallel job offers are distributed simultaneously, with the first franchise to respond being awarded the job.

### **Queuing job offers**

Job offers can be limited to one-at-a-time, i.e. the franchisee must respond to the current job offer prior to being sent another.

When the one-at-a-time policy is in force, subsequent job offers can either

- » be immediately sent to the next-best franchisee
- » be queued until the current job offer has been accepted, rejected or a timeout reached

### **Throttling job offers**

Job offers can also be throttled through the provision of daily and weekly job offer targets. These targets are set on individual franchises. Ranking rules can preference those franchises who are furthest from achieving their targeted volume of job offers.

## Ranking rules

Ranking rules are used only in sequential mode. Ranking rules determine the order in which job offers are made to franchisees. Ranking is calculated at the point of distributing the job offer to the next highest franchisee.



- A typical example of a ranking rule set
  - » Daily target is not yet reached (order by true first), then
  - » Weekly offer variance (order by greatest first), then
  - » Daily offer variance (order by greatest first), then
  - » Distance (order by least distance first)

Ranking rules can be specialized to operate differently for in-territory and out-of-territory jobs.

## Regional and isolated territories

It is possible to override the normal job offer distribution rules on a territory-by-territory basis for territories that are regional or have no alternative franchisees nearby. These overrides are controlled on a franchisee's Franchise Profile Account.

# Job allocation process

## Introduction

Job Allocation System is a rules-based system to efficiently allocate in-bound job requests across a franchise network. The system successfully automates the vast majority of inbound job requests, speeding the allocation of jobs to franchises while reducing the effort required to do so. Exceptional cases require manual management and intervention.

This chapter describes:

- » How the Job Allocation System works
- » How the Job Allocation System can be configured (or, reconfigured)

To learn how to provide on-going management of and intervention in exceptional cases, See Managing Job Allocation.

## How it works

The function of the Job Allocation System is to translate the Job Address to a Territory Location.

The screenshot displays a Salesforce CRM record for a job with ID 'JN-00401'. The record is organized into several sections. The 'Job Contact Information' section includes fields for Salutation, First Name (Luke), Last Name (Dardanelles), Company, Email (lorynj@gmail.com), Mobile (0404888444), Other Phone (0404888444), and Job Description. A green box highlights the 'Street' field, which contains '22 Swanson Way'. Below this, there are fields for Suburb (Claymore), Postcode (2559), Country (Australia), State (NSW), Map Job, View Google Map, Geo-code Accuracy, and ROOFTOP. The 'Territory & Location Information' section is also highlighted with a green box and contains the following data: Territory (Claymore), Territory Franchisee (FCS - Claymore), Territory Status (Owned), and Location (-34.0462628999999, 150.8061899). A green arrow points from the 'Street' field to the 'Territory & Location Information' section, with the text 'Job Address drives Territory and Location Information' written in green next to it.

The Job Allocation System then uses a defined set of rules to identify a list of Job Potentials—sorted according to defined criteria—to determine the order in which the job will be offered to franchisees.

Job Potentials (6+)			
JOB POTENTIAL: JOB POTENTIAL NU...	ACCOUNT NAME	EXCLUSION REASON	OFFERED
JPN-00797	FCS - Narellan Vale	Potential is on Territory Only	<input type="checkbox"/>
JPN-00799	FCS Maroubra	Potential Franchisee is not active	<input type="checkbox"/>
JPN-00794	FCS - Bexley		<input checked="" type="checkbox"/>
JPN-00793	FCS - Kingsgrove		<input type="checkbox"/>
JPN-00796	FCS - Sans Souci		<input type="checkbox"/>
JPN-00798	FCS - Campsie		<input type="checkbox"/>

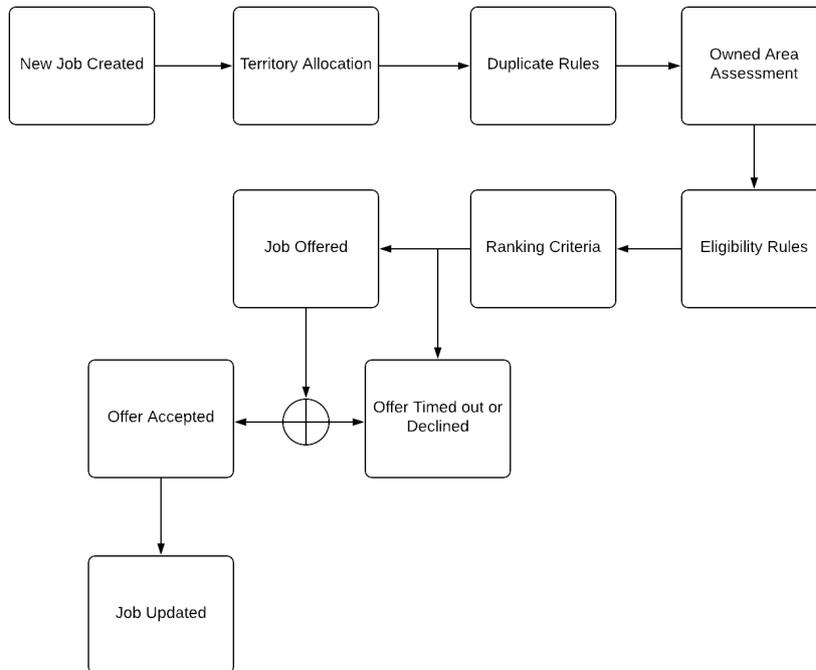
Job offers are then made to franchisees. Using the configured rule set in conjunction with the responses of franchisees, allocation to a franchisee is then made.

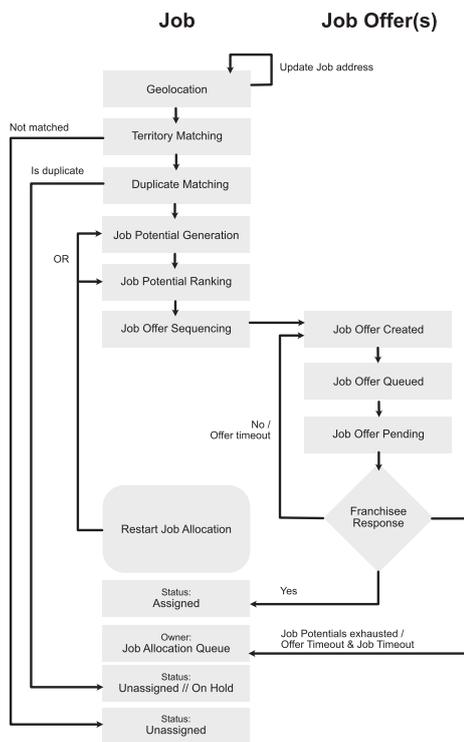


Manual monitoring is required to deal with the exceptional cases that fail to enter job allocation or fail to allocate to a particular franchisee. For information about manual oversight of job allocation, See Managing Job Allocation.

## Step-by-step

The Job Allocation System operates on a **Job** and one or more **Job Offers**. Each step in the process is identified by whether it affects the **Job** or the **Job Offer(s)**.

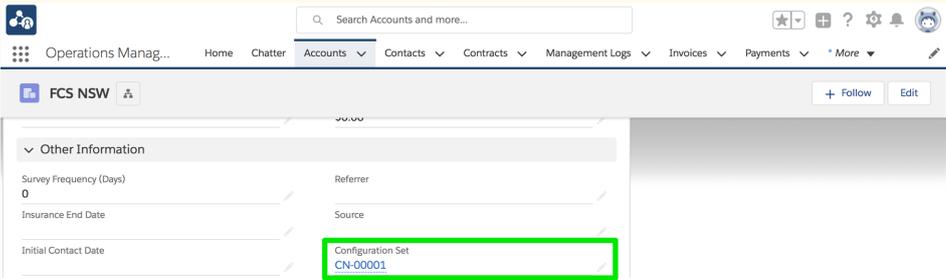




Key steps in this process are described below with respect to

- » the configuration settings that control how the Job Allocation System functions
- » the output produced by the Job Allocation System

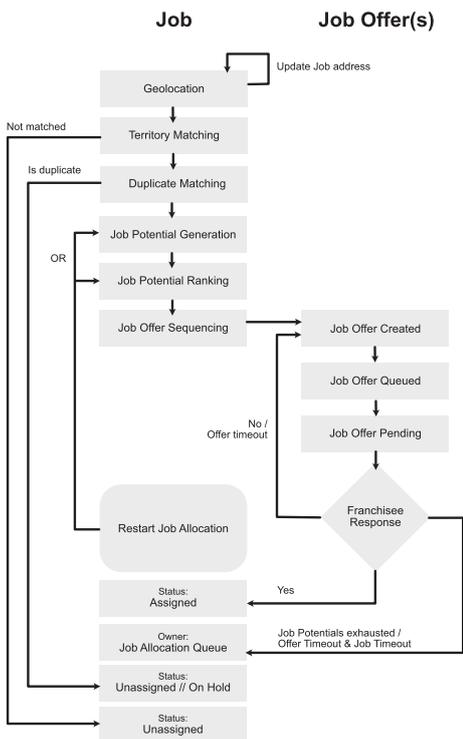
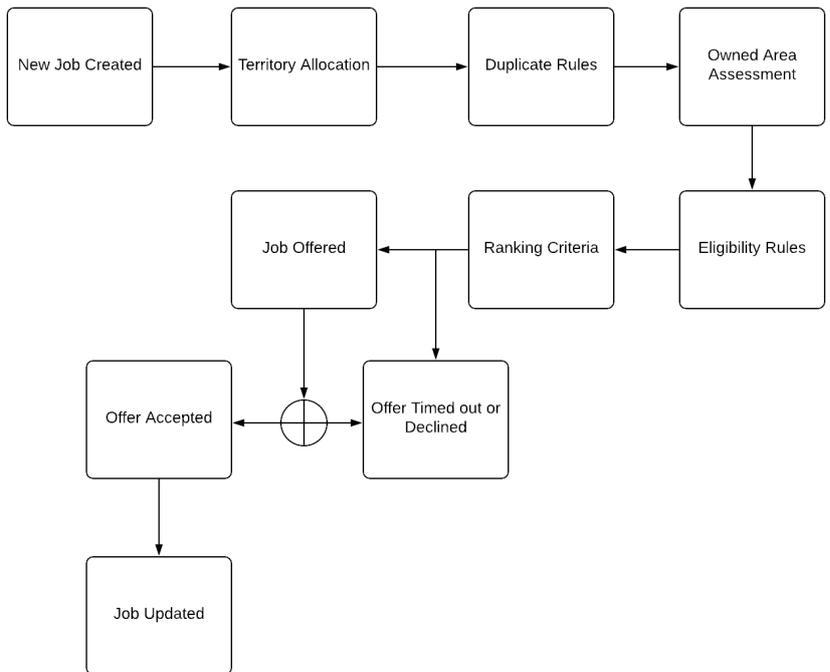
 Each Master Franchise Profile Account can have its own configuration settings. This is controlled by the Master Franchise Profile Account's Configuration Set record.



Read each of the topics below to understand how the Job Allocation System functions.

## Job allocation overview

The job allocation process is sketched out below. The Job Allocation System operates across a Job and one or more Job Offers. Each step in the process is identified by whether it affects the Job or the Job Offer.

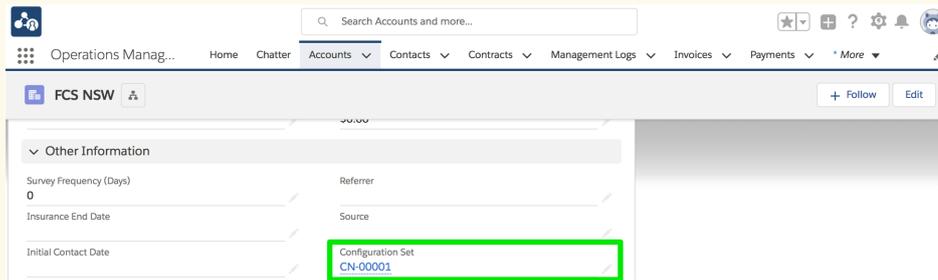


Key steps in this process are described below with respect to

- » the configuration settings that control how the Job Allocation System functions
- » the output produced by the Job Allocation System



Each Master Franchise Profile Account can have its own configuration settings. This is controlled by the Master Franchise Profile Account's Configuration Set record.



## Geolocation

Geolocation takes the address information provided by the customer and converts it to a spatial coordinate using the Google Maps API.

### Configuration

- » Geo-location is performed by service calls to Google Maps. Your Google Maps API key is configured during implementation.
- » Geo-coding precision is controlled by the `Geo-coding Minimum Level` setting, which can include one or more of the following options:
  - » `Rooftop`
  - » `Range_Interpolated`
  - » `Geometric_Center`
  - » `Approximate`

### Outputs

- » Geo-location is recorded in the `Job's Location` and `Geo-code Accuracy` fields. The `Location` value describes the latitude and longitude of the location. The `Geo-code Accuracy` value describes the precision with which this location is identified.
- » If Google returns a `Geo-Code Accuracy` value not listed in the set statuses within the `Geo-coding Minimum Level` setting, JAS will not attempt to allocate it.

## Territory matching

Territory allocation involves

- » determining which territory the geo-located job belongs to, or else
- » assigning the job to the Master Franchise Profile Account's Job Allocation Queue.

Identifying the territory the job is assigned to is the first step of the Job Allocation System. If the Job Allocation System cannot match the job to a territory, it passes the job through to the Job Allocation Queue for manual processing.



It is important to create **Territories** and **Territory Locations** covering all job addresses. If a job address does not match any given **Territory Location** owned by an active **Territory** belonging to the Master Franchise Profile Account then job allocation will not create job potentials and therefore will not allocate jobs to franchisees.

## Configuration

- » If the job cannot be matched to a territory, it is associated with the job queue identified by the **Job Allocation Queue Name** setting.

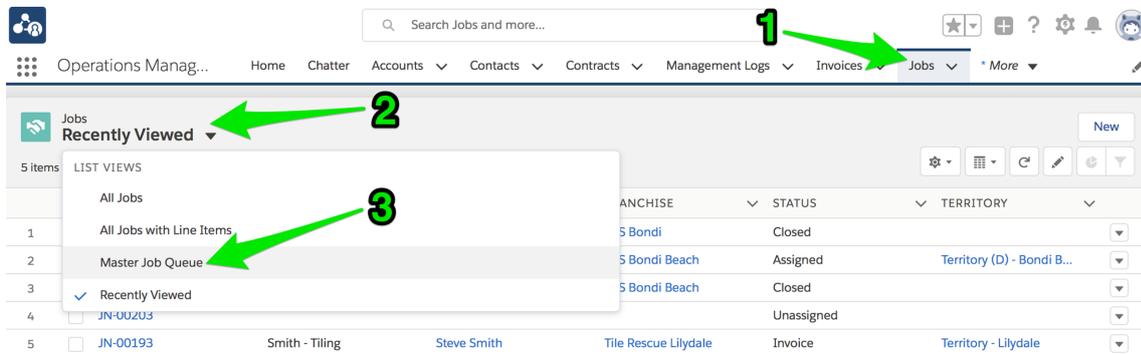
The screenshot shows the 'Job Allocation Settings' for a specific job (CN-00001). The settings are organized into two columns. The left column includes: Job Type Eligibility (Off), Eligibility Criteria Logic (1 AND 2), Geo-coding Minimum Level (Rooftop), Job Offer Processing (Sequential), Distance Calculation (Straight Line), and Distance Units (Kilometres). The right column includes: Timeout Per Offer (15), Timeout Per Job (120), Customer Matching Criteria (a complex formula involving email, phone, first name, last name, mailing street, city, postal code, state, and country), Job Allocation Queue Name (Default Job Queue), No Timeout In Owned Area (unchecked), One Offer At A Time (checked), and Offer Owned Area 24/7 (unchecked).

## Outputs

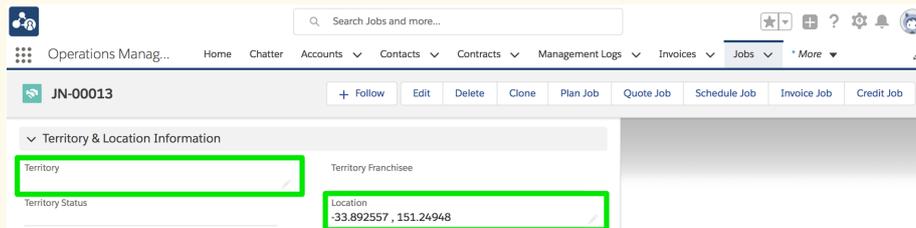
- » When the suburb and postcode of the address matches a **Territory Location**, the **Territory** owning the **Territory Location** is recorded in the **Job Territory** field.

The screenshot shows the 'Job Information' for a specific job (JN-00196). The 'Territory & Location Information' section is expanded, showing the following details: Territory (Territory (D) - Bondi Beach), Territory Franchisee (FCS Bondi Beach), and Location (-33.8869722 , 151.2740841).

» When the suburb and postcode of the address is not found to match to any **Territory Location** (or, if the owning **Territory** is not *Active* or not owned by the Master Franchise Profile Account), the Job is assigned to the Master Franchise Profile's **Job Allocation Queue**, which is configured on the Master Franchise Profile's **Configuration Set**. If it has been created, the Job Allocation Queue is found as a list view on the **SalesforceJobs** tab.



» A job that is assigned to the Job Allocation Queue may be geo-located but not be matched to a territory.



## Duplicate matching

Duplicate matching involves the comparison of fields to identify potential duplicates. Jobs matching the duplicate check criteria are assigned a *Substatus* of *On Hold*.

## Configuration

» Duplicate Job Criteria specifies the duplicate match rules.

» Duplicate Job Timeframe specifies the number of hours in which jobs are examined for potential duplicates.

The screenshot shows the 'Job Allocation Settings' page in Salesforce. The 'Duplicate Job Timeframe' field is highlighted with a green box and contains the value '72'. Below it, the 'Duplicate Job Criteria' field contains the criteria: 'FCS\_OPS\_\_Last\_Name\_\_c && FCS\_OPS\_\_Suburb\_\_c || FCS\_OPS\_\_Email\_\_c || FCS\_OPS\_\_Mobile\_\_c'.

In this example, Duplicate Job Criteria specifies that a job is a duplicate when job records created within 72 hours can be matched by

- » Last Name AND Suburb, OR
- » Email, OR
- » Mobile



To cause job requests to be examined for possible duplicates, Duplicate Job Timeframe must have a value greater than zero.

## Outputs

When a job is matched as a duplicate, the Job's Substatus is assigned to *On Hold*.



To rapidly identify duplicate jobs, it can be useful to create a list view for Jobs On Hold.

The screenshot shows a Salesforce list view for 'Jobs On Hold'. The page title is 'Jobs On Hold' and it indicates '0 items'. The list is sorted by 'JOB NUMBER' and filtered by 'Sub Status equals On Hold'. The main content area is empty, displaying 'No items to display.' The filters panel on the right shows the active filter: 'Sub Status equals On Hold'. There are buttons for 'Add Filter', 'Remove All', and 'Add Filter Logic'.

## Owned area assessment

Owned area assessment determines whether the territory is *Owned* or *Unowned*. *Owned* and *Unowned* territories are subject to different processing in subsequent statuses.

### Inputs

» A territory's ownership status is given by the Territory Status field.

The screenshot shows a Salesforce record for 'Territory - Bellevue Hill'. The record details are as follows:

Field	Value
Status	Unowned
Franchise	
Owner	OPS Head Office Manager
Active	<input checked="" type="checkbox"/>
Master Territory	Master Territory - NSW
Territory Name	Territory - Bellevue Hill
Franchise	
Territory Owner	
Territory Owners Mobile	
Product	Bronze Territory
Product Classification	Bronze
Type	Metro
Active	<input checked="" type="checkbox"/>
Country	Australia
State	NSW
Territory Number	TER-466
Timezone	

The 'Status' field, which contains the value 'Unowned', is highlighted with a green border in the screenshot.

## Outputs

- » The ownership status of a territory at the time of processing is recorded in the **Job Territory Status** field.

The screenshot shows a software interface for job management. At the top, there is a search bar and navigation tabs including 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Jobs', and 'More'. Below the navigation, the job ID 'JN-00197' is displayed with several action buttons: '+ Follow', 'Edit', 'Delete', 'Clone', 'Plan Job', 'Quote Job', 'Schedule Job', 'Invoice Job', and 'Credit Job'. A section titled 'Territory & Location Information' is expanded, showing details for 'Territory - Bellevue Hill'. The 'Territory Status' field is highlighted with a green border and contains the text 'Unowned'. Other fields include 'Territory Franchisee', 'Location', and 'Territory Franchisee'.

## Job Potential Generation

The Job Allocation System generates a list of potential franchises to whom the job could be offered. This list is created by drawing a box around each Franchise Profile Account's Travel Distance Origin. The box side-length is given by Max Travel Distance.

When the job location exists within the franchise's box, the franchise is added to the list of Job Potentials.



Being added to the list of Job Potentials does not mean the Job Allocation System will make a job offer. It does mean that the franchise is further assessed to determine whether or not it will be granted a job offer.

So, Job Potentials represents the full listing of all franchises whose served areas encompass the job location when assessed by examining Max Travel Distance using latitude and longitude.

A Job Potential record is generated for each franchise under consideration.

## Outputs

- » **Job Potentials** are recorded on the Job. You find it on the **Job Related** tab.

Job Potentials (4)			
JOB POTENTIAL: JOB P...	ACCOUNT NAME	EXCLUSION REASON	OFFERED
<a href="#">JPN-00389</a>	<a href="#">FCS Randwick</a>		<input type="checkbox"/> <span>▼</span>
<a href="#">JPN-00390</a>	<a href="#">FCS Bondi</a>		<input type="checkbox"/> <span>▼</span>
<a href="#">JPN-00391</a>	<a href="#">FCS Maroubra</a>		<input type="checkbox"/> <span>▼</span>
<a href="#">JPN-00392</a>	<a href="#">FCS Bondi Beach</a>		<input checked="" type="checkbox"/> <span>▼</span>
<a href="#">View All</a>			

## Determining distance

The latitude and longitude distance assessment used to generate the list of Job Potentials is the first-pass in determining distance. Further assessments of distance is also included.

Distance is also assessed using either of the following two methods:

- » Straight Line, or
- » By road

Both methods are determined through calls to Google Maps, but they can return different results.

The straight line method calculates a straight-line distance between the franchise's `Travel Distance Origin` and the job's `Location`.



Some jobs fall within the box calculation but fall outside the straight line calculation.

The by road method returns the distance between the franchise's `Travel Distance Origin` and the job's `Location` when calculated by the most direct route by road.



By road will always be further than the straight-line distance. Fewer job potentials will be returned (compared with the straight line method) for any given travel distance.

## Configuration

- » You can determine the Distance Calculation method. You can choose between calculating the distance via *Straight Line* or *By Road*.

The screenshot shows the 'Job Allocation Settings' configuration page for record CN-00001. The 'Distance Calculation' field is highlighted with a green box and set to 'Straight Line'. Other settings include Job Type Eligibility (Off), Eligibility Criteria Logic (1 AND 2), Timeout Per Offer (15), Timeout Per Job (120), Customer Matching Criteria (Email, Phone, First Name, Last Name, Mailing Street, Mailing City, Mailing Postal Code, Mailing State, Mailing Country), Geo-coding Minimum Level (Rooftop), Job Offer Processing (Sequential), Distance Units (Kilometres), Job Allocation Queue Name (Default Job Queue), No Timeout In Owned Area (unchecked), One Offer At A Time (checked), and Offer Owned Area 24/7 (unchecked).

## Outputs

- » The result of the distance calculation is recorded in the Job Potentials Distance field.

The screenshot shows the 'Job Potential' record JPN-00266. The 'Distance' field is highlighted with a green box and contains the value '0.85'. Other fields include Job Potential Number (JPN-00266), Job (JN-00151), Suburb (Bondi Beach), Franchise (FCS Bondi Beach), Offered (checked), Exclusion Reason (Potential is on Territory Only), Sequence Number, Travel Distance (10.00), Daily Variance (-32), and Weekly Variance (-28).



Travel Distance is copied from the franchisee's Franchise Profile Account Max Travel Distance field. It is copied to the Job Potential record as a convenience when manually reviewing the processing of Eligibility Criteria and ranking of Job Potentials.

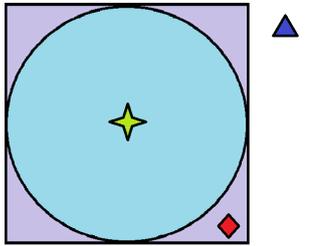


### Tip 1: Why some franchisees are excluded by max travel distance criteria

The fact that a franchise is listed among the Job Potentials shows that it is within the box calculation (determined by latitude and longitude). However, their distance may still be assessed as being outside their Max Travel Distance. Here's how it can happen.

Consider the initial box calculation. The `Travel Distance Origin` is given by the star.

- » When the job is located outside the box (e.g. the blue triangle) the franchise is not listed as a Job Potential.
- » When the job is located within the box the franchise is included as a Job Potential.
- » When the system is configured to use straight line distance calculation, then any job falling outside the circle will be excluded as being beyond max travel distance (e.g. red diamond).



When the system is configured to use the “by road” distance method, then the principles described above will still hold, but the “circle” will be geographically “distorted” based on road distance.



## Tip 2: Why some franchisees are offered jobs further than their max travel distance

When you dial into Google Maps the distance between the franchisee's location and the job, sometimes Google will give you a travel distance that is further away than a franchisee's Max Travel Distance, and yet the franchisee may still be offered the job.

This happens when your system is configured to use Straight Line distance processing.



When a franchisee has a Max Travel Distance of 40 km, they may still be offered a job that is 43 km away by road. This is because the job is less than or equal to 40 km away by straight line distance.



Jobs will never be offered further than the Max Travel Distance when the by road distance method is configured.

## Determining distance

The latitude and longitude distance assessment used to generate the list of Job Potentials is the first-pass in determining distance. Further assessments of distance is also included.

Distance is also assess using either of the following two methods:

- » Straight Line, or
- » By road

Both methods are determined through calls to Google Maps, but they can return different results.

The straight line method calculates a straight-line distance between the franchise's Travel Distance Origin and the job's Location.



Some jobs fall within the box calculation but fall outside the straight line calculation.

The by road method returns the distance between the franchise's Travel Distance Origin and the job's Location when calculated by the most direct route by road.



By road will always be further than the straight-line distance. Fewer jobs will be returned (compared with the straight line method) for any given travel distance.

## Configuration

- » You can determine the Distance Calculation method. You can choose between calculating the distance via *Straight Line* or *By Road*.

The screenshot shows the Salesforce Operations Manager interface for configuration. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', and a dropdown for 'CN-00001'. The main content area is titled 'CN-00001' and contains 'Job Allocation Settings'. The settings are organized into two columns:

Setting Name	Value
Job Type Eligibility	Off
Eligibility Criteria Logic	1 AND 2
Geo-coding Minimum Level	Rooftop
Job Offer Processing	Sequential
Distance Calculation	Straight Line
Distance Units	Kilometres
Timeout Per Offer	15
Timeout Per Job	120
Customer Matching Criteria	Email = [FCS_OPS__Email__c]    Phone = [FCS_OPS__Mobile__c]    (FirstName = [FCS_OPS__First_Name__c] && LastName = [FCS_OPS__Last_Name__c])    (MailingStreet = [FCS_OPS__Street__c] && MailingCity = [FCS_OPS__Suburb__c] && MailingPostalCode = [FCS_OPS__Postcode__c] && MailingState = [FCS_OPS__State_Custom__c] && MailingCountry = [FCS_OPS__Country_Custom__c])
Job Allocation Queue Name	Default Job Queue
No Timeout In Owned Area	<input type="checkbox"/>
One Offer At A Time	<input checked="" type="checkbox"/>
Offer Owned Area 24/7	<input type="checkbox"/>

## Outputs

- » The result of the distance calculation is recorded in the Job Potentials `Distance` field.

The screenshot shows a Salesforce record for Job Potential JPN-00266. The record details are as follows:

Field	Value
Job Potential Number	JPN-00266
Job	JN-00151
Suburb	Bondi Beach
Franchise	FCS Bondi Beach
Offered	<input checked="" type="checkbox"/>
Exclusion Reason	Potential is on Territory Only
New Section	
Distance	0.85
Travel Distance	10.00
Sequence Number	
Daily Variance	-32
Weekly Variance	-28



Travel Distance is copied from the franchisee's **Franchise Profile Account** Max Travel Distance field. It is copied to the Job Potential record as a convenience when manually reviewing the processing of Eligibility Criteria and ranking of Job Potentials.

## Job Potential Eligibility & Ranking

### Eligibility

Eligibility processing involves applying eligibility criteria against each Job Potential record. When a Job Potential is found to fail a criteria, the Job Potential is excluded from further consideration. Ineligibility results in an `Exclusion Reason` being recorded on the Job Potential record.

### Built-in eligibility criteria

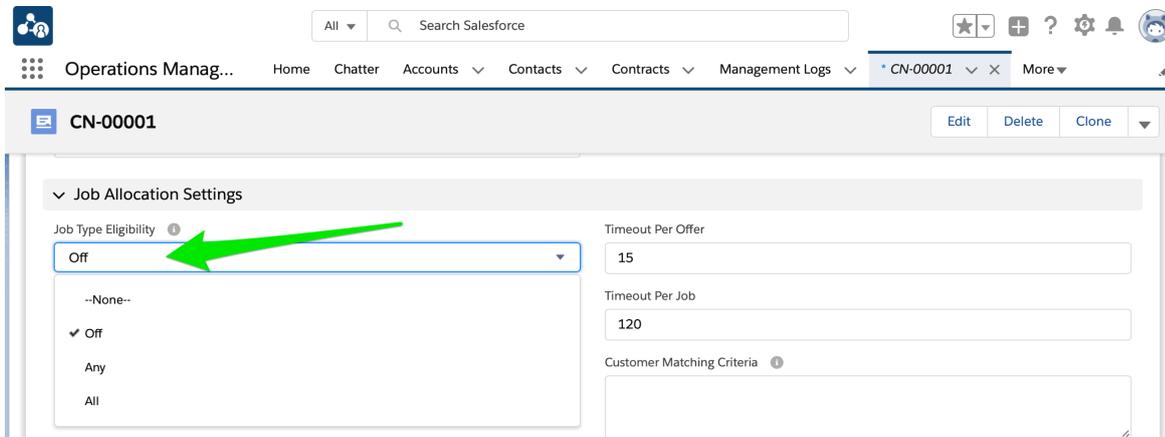
Some eligibility requirements are built into Operations Management. The two major built-in eligibility criteria are

- » Distance
- » Job Type

Job Type eligibility can be set to one of three values.

- » `Off` prevents job types being used to assess the eligibility of a particular Job Potential.

- » *Any* includes a Job Potential when there is a match between any of the Job Types included on the Job Request and the Job Types recorded against a Franchise Profile Account.
- » *All* excludes a Job Potential unless the Franchise Profile Account includes all the Job Types listed on the Job Request.

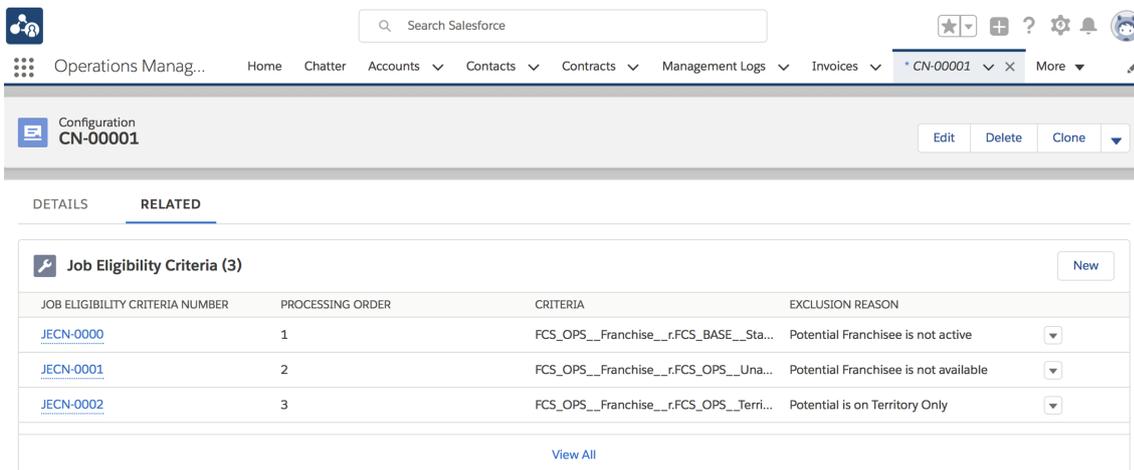


## Dynamic eligibility criteria

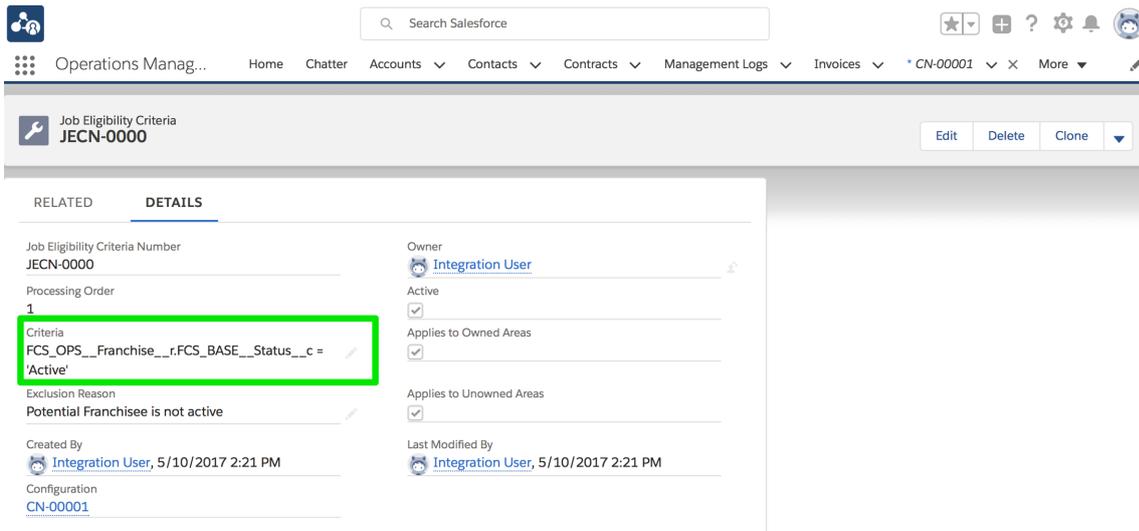
Dynamic eligibility criteria are specified through system configuration. Dynamic eligibility allows for new criteria to be configured.

## Configuration

- » **Job Eligibility Criteria** is configured on the Master Franchise Profile Account's Configuration Set's Related tab.



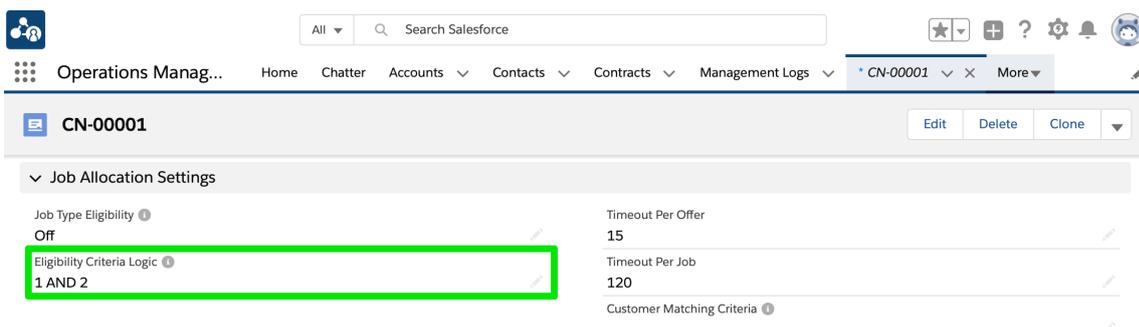
- » Each **Job Eligibility Criteria** rule is configured according to logic defined by the **Criteria** field.



- » **Criteria** is a logic statement that must evaluate to true in order for the Job Potential to be included.
- » **Exclusion Reason** is a human readable statement that is recorded in the Job Potential Exclusion Reason field when the **Criteria** statement evaluates to false.

 You can control whether the criteria applies to **Owned Areas** or **Unowned Areas**. You can control the **Processing Order** of the criteria. To prevent an Eligibility Criteria rule from being evaluated, set **Active** to *False*.

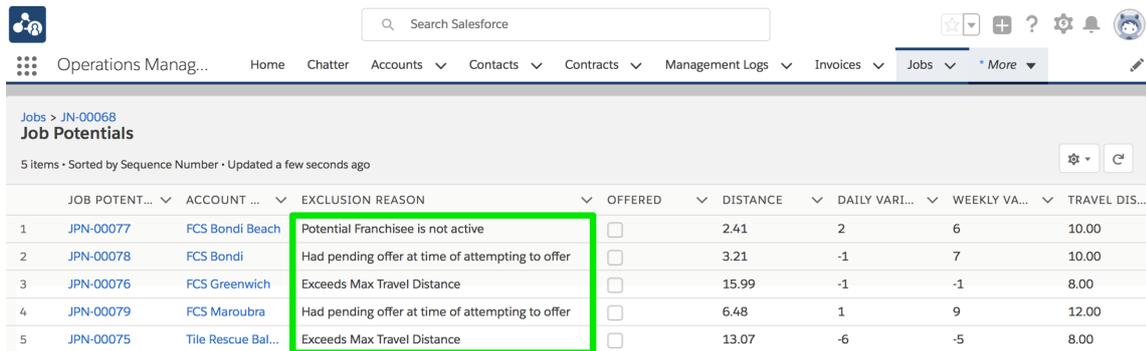
- » **Job Eligibility Criteria** are processed in the order specified by **Processing Order** when the **Active** field is *True*.
- » The overall logical evaluate of **Job Eligibility Criteria** are specified using the **Eligibility Criteria Logic** field on the **Configuration** record.



- » **Eligibility Criteria Logic** can include the operators *AND*, *OR*, *NOT* as well as ordering operators open and closed parentheses. *1 AND 2 NOT (3 OR 4)* is a valid statement.

## Outputs

- » When a Job Potential fails an Eligibility Criteria rule, the Eligibility Criteria Exclusion Reason is inserted into Job Potential Exclusion Reason.



The screenshot shows the Salesforce interface for Job Potentials. The table lists five items, sorted by Sequence Number. The 'EXCLUSION REASON' column is highlighted with a green box, showing the following values:

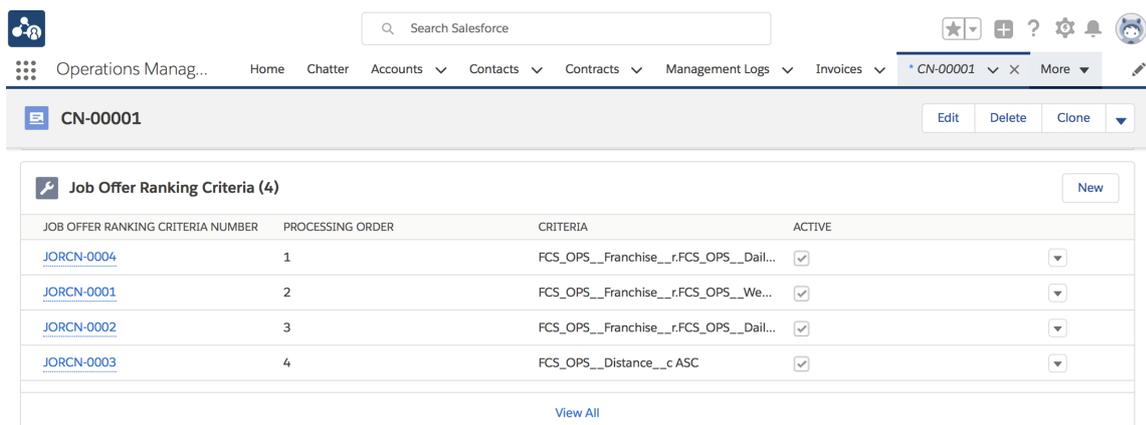
JOB POTENT...	ACCOUNT ...	EXCLUSION REASON	OFFERED	DISTANCE	DAILY VARI...	WEEKLY VA...	TRAVEL DIS...	
1	JPN-00077	FCS Bondi Beach	Potential Franchisee is not active	<input type="checkbox"/>	2.41	2	6	10.00
2	JPN-00078	FCS Bondi	Had pending offer at time of attempting to offer	<input type="checkbox"/>	3.21	-1	7	10.00
3	JPN-00076	FCS Greenwich	Exceeds Max Travel Distance	<input type="checkbox"/>	15.99	-1	-1	8.00
4	JPN-00079	FCS Maroubra	Had pending offer at time of attempting to offer	<input type="checkbox"/>	6.48	1	9	12.00
5	JPN-00075	Tile Rescue Bal...	Exceeds Max Travel Distance	<input type="checkbox"/>	13.07	-6	-5	8.00

## Ranking

Job Potential Ranking establishes the ordering of potential Job Offers when the Job Offer Processing policy is *Sequential*.

## Configuration

- » The Job Offer Ranking Criteria are defined on the Configuration Set's Related tab.



The screenshot shows the Salesforce Configuration Set 'CN-00001' with the 'Job Offer Ranking Criteria' related tab. The table lists four criteria:

JOB OFFER RANKING CRITERIA NUMBER	PROCESSING ORDER	CRITERIA	ACTIVE
<a href="#">JORCN-0004</a>	1	FCS_OPS__Franchise__r.FCS_OPS__Dail...	<input checked="" type="checkbox"/>
<a href="#">JORCN-0001</a>	2	FCS_OPS__Franchise__r.FCS_OPS__We...	<input checked="" type="checkbox"/>
<a href="#">JORCN-0002</a>	3	FCS_OPS__Franchise__r.FCS_OPS__Dail...	<input checked="" type="checkbox"/>
<a href="#">JORCN-0003</a>	4	FCS_OPS__Distance__c ASC	<input checked="" type="checkbox"/>

» Each ranking criteria provides a sorting rule for the Job Potentials list.

Job Offer Ranking Criteria  
JORCN-0004

RELATED DETAILS

Job Offer Ranking Criteria Number  
JORCN-0004

Processing Order  
1

Criteria  
FCS\_OPS\_\_Franchise\_\_r.FCS\_OPS\_\_Daily\_Offer\_Variance\_Flag\_F\_\_c DESC

Owner  
Integration User

Active

Created By  
Integration User, 5/10/2017 4:47 PM

Last Modified By  
Integration User, 5/10/2017 4:48 PM

Configuration  
CN-00001



Think about each Job Offer Ranking Criteria as contributing a sort condition on a specific field, similar to a SQL Order By clause.

## Outputs

» The outcome of Job Potential Ranking is the assignment of a Sequence Number to each Job Potential in order to indicate its rank.

Jobs > JN-00537  
Job Potentials

4 items - Sorted by Sequence Number - Updated a minute ago

Job Potential: J...	Account Name	Exclusion Reason	Offered	Dist...	Daily V...	Weekly Va...	Travel Dist...	Sequence Number ↑
1 JPN-01137	FCS - Lilydale	Potential is on Territory Only	<input type="checkbox"/>	11.61	5	5	100.00	
2 JPN-01139	FCS - Ringwood		<input checked="" type="checkbox"/>	0.10	5	5	100.00	1
3 JPN-01136	FCS - Montrose		<input type="checkbox"/>	9.63	5	5	100.00	2
4 JPN-01138	FCS - Balaclava		<input type="checkbox"/>	22.60	5	5	100.00	3

## Job Offer Sequencing

Job Offer Sequencing involves the dispatch of Job Offers according to the configured policy within the implementation. Available policies are

- » Sequential, OR
- » Parallel

Sequential or parallel jobs offers determines what happens to a job once it has been determined that

- » the franchise territory owner cannot be offered the job
- » the franchise territory owner rejected the job, or
- » the job offer to the franchise territory owner timed out

## Sequential Job Offers

With sequential offers, each non-territory franchise is made a job offer in turn (until one of the franchisees accepts the offer or the job time out is reached).

## Parallel Job Offers

With parallel job offers, all non-territory franchise are offered the job simultaneously. The first franchise owner to accept the job becomes its owner.

## Setting the Policy

### Configuration

» Control the Job Offer processing method via the Job Offer Processing setting.

The screenshot shows the Salesforce configuration page for 'CN-00001'. The 'Job Allocation Settings' section is expanded, showing various settings. The 'Job Offer Processing' setting is highlighted with a green box and is set to 'Sequential'. Other settings include 'Job Type Eligibility' (Off), 'Eligibility Criteria Logic' (1 AND 2), 'Timeout Per Offer' (15), 'Timeout Per Job' (120), 'Customer Matching Criteria' (a complex formula), 'Job Allocation Queue Name' (Default Job Queue), 'No Timeout In Owned Area' (unchecked), 'One Offer At A Time' (checked), and 'Offer Owned Area 24/7' (unchecked).

### Detailed refinements

If the system is able to offer the job to the territory owner, it will do so. If it is unable to offer the job to the territory owner, or the territory owner rejects the offer or it times out, then the job offer will be offered to other franchisees.

How the subsequent job offers are made depends on whether the offers are configured in sequence or parallel.

- » In parallel, the job is allocated to whichever franchise accepts the job offer first.
- » In sequence, the job is offered to each franchise in turn until the job offer is accepted or the Job Time Out is reached. Job offers remain pending until they are accepted, declined or one of the timeout limits is reached.

Further configuration options adjust job allocation behavior.

## Configuration

- » One Offer At A Time prevents a Job Offer from being sent if the franchisee currently has an active job offer. When there is an active job, setting Queue In Territory Offers sets the Job Offer Status to *Queued*. Setting Queue In Territory Offers to *False* causes the job to be offered to the next highest ranked franchisee.



When One Offer At A Time is true and Queue In Territory Offers is false, a franchisee will be skipped when it has an existing pending Job Offer. If this Job is subsequently re-offered (at a time when the higher-ranking franchisee has cleared its previously-pending Job Offer) then the highest ranking franchisee is re-offered the job before any lower-ranking franchisees are offered it.

- » Timeout Per Offer sets the maximum number of hours on an unresponded Job Offer. Beyond this threshold, the Job Offer is expired. When One Offer At A Time is selected, the Job Offer is extended to the next highest ranked franchisee.
- » Timeout Per Job sets a maximum number of hours the job can sit within the Job Offer process. Beyond this threshold, the Job is assigned to the queue indicated by Job Allocation Queue Name.
- » Offer Inside Contact Hours causes Job Offers to queue until a Franchise Profile Account's Business Hours record indicates they are open for business.
- » Offer Owned Areas 24/7 overrides Offer Inside Contact Hours for Job Offers that fall inside the franchisee's Territory, causing them to be immediately sent.
- » No Timeout in Owned Area overrides timeout settings when the Territory is Owned. This is typically set for regional franchisees when there are no other franchisees in the area.

## Outputs

- » Outputs result in one or more Job Offers being generated for a Job, or the Job being assigned to the master franchise's job queue.

The screenshot shows the 'Job Potentials' table in the Operations Management system. The table has columns for Job Potential, Account Name, Exclusion Reason, Offered, Dist..., Daily V..., Weekly Va..., Travel Dist..., and Sequence Number. The 'Sequence Number' column is highlighted with a green box, showing values 1, 2, and 3 for the first three rows.

Job Potential: J...	Account Name	Exclusion Reason	Offered	Dist...	Daily V...	Weekly Va...	Travel Dist...	Sequence Number ↑
1 JPN-01137	FCS - Lilydale	Potential is on Territory Only	<input type="checkbox"/>	11.61	5	5	100.00	1
2 JPN-01139	FCS - Ringwood		<input checked="" type="checkbox"/>	0.10	5	5	100.00	2
3 JPN-01136	FCS - Montrose		<input type="checkbox"/>	9.63	5	5	100.00	3
4 JPN-01138	FCS - Balaclava		<input type="checkbox"/>	22.60	5	5	100.00	

## Job potential ranking

When Job Offers Processing is sequential, the Job Allocation System processes Job Potentials in the order given by the Job Offer Ranking Criteria. Job Potential Ranking is processed to establish the ranking order of any potential Job Offers.

### Configuration

- » The Job Offer Ranking Criteria are defined on the **Configuration Set's Related** tab.

The screenshot shows the Salesforce interface for Configuration Set 'CN-00001'. The 'Job Offer Ranking Criteria (4)' section is expanded, displaying a table with the following data:

JORCN-0004	JORCN-0001	JORCN-0002	JORCN-0003
JORCN-0004	JORCN-0001	JORCN-0002	JORCN-0003
1	2	3	4
FCS_OPS__Franchise__r.FCS_OPS__Dail...	FCS_OPS__Franchise__r.FCS_OPS__We...	FCS_OPS__Franchise__r.FCS_OPS__Dail...	FCS_OPS__Distance__c ASC
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- » Each ranking criteria provides a sorting rule for the Job Potentials list.

The screenshot shows the details for Job Offer Ranking Criteria 'JORCN-0004'. The 'DETAILS' tab is active, showing the following information:

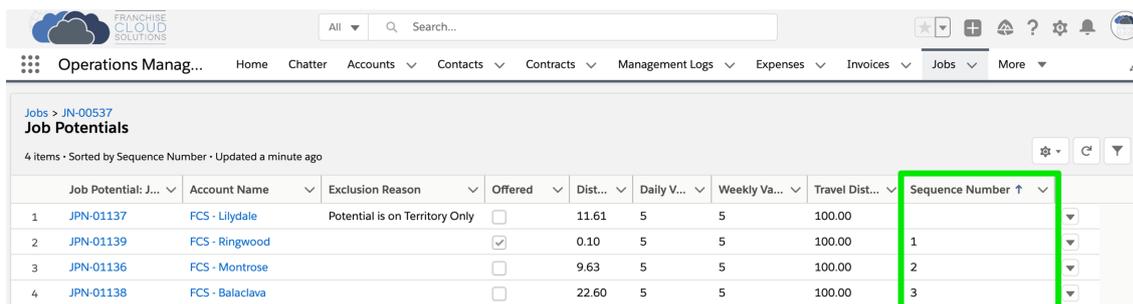
- Job Offer Ranking Criteria Number: JORCN-0004
- Processing Order: 1
- Criteria: FCS\_OPS\_\_Franchise\_\_r.FCS\_OPS\_\_Daily\_Offer\_Variance\_Flag\_F\_\_c DESC (highlighted with a green box)
- Owner: Integration User
- Active:
- Created By: Integration User, 5/10/2017 4:47 PM
- Last Modified By: Integration User, 5/10/2017 4:48 PM
- Configuration: CN-00001



Think about each Job Offer Ranking Criteria as contributing a sort condition on a specific field, similar to a SQL Order By clause.

## Outputs

- » The outcome of Job Potential Ranking is the generation of a **Job Offer** record, and the **Job Potential Offered** flag being set.



Job Potential: J...	Account Name	Exclusion Reason	Offered	Dist...	Daily V...	Weekly Va...	Travel Dist...	Sequence Number ↑
1 JPN-01137	FCS - Lilydale	Potential is on Territory Only	<input type="checkbox"/>	11.61	5	5	100.00	1
2 JPN-01139	FCS - Ringwood		<input checked="" type="checkbox"/>	0.10	5	5	100.00	2
3 JPN-01136	FCS - Montrose		<input type="checkbox"/>	9.63	5	5	100.00	3
4 JPN-01138	FCS - Balaclava		<input type="checkbox"/>	22.60	5	5	100.00	3

## Distributing job offers

If the system is able to offer the job to the territory owner, it will do so. If it is unable to offer the job to the territory owner, or the territory owner rejects the offer or it times out, then the job offer will be offered to other franchisees.

How the subsequent job offers are made depends on whether the offers are configured for sequence or parallel.

- » In parallel, the job is allocated to whichever franchise accepts the job offer first.
- » In sequence, the job is offered to each franchise in turn until the job offer is accepted or the Job Timeout is reached. Job offers remain pending until they are accepted, declined or one of the timeout limits is reached.

Further configuration options adjust job allocation behavior.

## Configuration

- » **One Offer At A Time** prevents a Job Offer from being sent if the franchisee currently has an active job offer. When there is an active job, setting **Queue In Territory Offers** sets the Job Offer Status to *Queued*. Setting **Queue In Territory Offers** to *False* causes the job to be offered to the next highest ranked franchisee.



When **One Offer At A Time** is true and **Queue In Territory Offers** is false, a franchisee will be skipped when it has an existing pending Job Offer. If this Job is subsequently re-offered (at a time when the higher-ranking franchisee has cleared its previously-pending Job Offer) then the highest ranking franchisee is re-offered the job before any lower-ranking franchisees are offered it.

- » **Timeout Per Offer** sets the maximum number of hours on an unresponded Job Offer. Beyond this threshold, the Job Offer is expired. When **One Offer At A Time** is selected, the Job Offer is extended to the next highest ranked franchise.
- » **Timeout Per Job** sets a maximum number of hours the job can sit within the Job Offer process. Beyond this threshold, the Job is assigned to the queue indicated by **Job Allocation Queue Name**.
- » **Offer Inside Contact Hours** causes Job Offers to queue until a Franchise Profile Account's Business Hours record indicates they are open for business.
- » **Offer Owned Areas 24/7 overrides Offer Inside Contact Hours** for Job Offers that fall inside the franchisee's Territory, causing them to be immediately sent.
- » **No Timeout in Owned Area overrides timeout settings** when the Territory is Owned. This is typically set for regional franchisees when there are no other franchisees in the area.

## Outputs

- » Outputs result in one or more Job Offers being generated for a Job, or the Job being assigned to the master franchise's job queue.

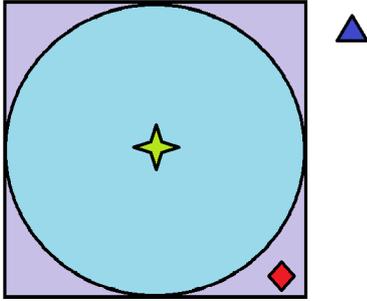
Job Potential: J...	Account Name	Exclusion Reason	Offered	Dist...	Daily V...	Weekly Va...	Travel Dist...	Sequence Number ↑
1 JPN-01137	FCS - Lilydale	Potential is on Territory Only	<input type="checkbox"/>	11.61	5	5	100.00	
2 JPN-01139	FCS - Ringwood		<input checked="" type="checkbox"/>	0.10	5	5	100.00	1
3 JPN-01136	FCS - Montrose		<input type="checkbox"/>	9.63	5	5	100.00	2
4 JPN-01138	FCS - Balaclava		<input type="checkbox"/>	22.60	5	5	100.00	3

## Why some franchisees are excluded by max travel distance criteria?

The fact that a franchise is listed among the Job Potentials shows that it is within the box calculation (determined by latitude and longitude). However, their distance may still be assessed as being outside their Max Travel Distance. Here's how it can happen.

Consider the initial box calculation. The **Travel Distance Origin** is given by the star.

- » When the job is located outside the box (e.g. the blue triangle) the franchise is not listed as a Job Potential.
- » When the job is located within the box the franchise is included as a Job Potential.
- » When the system is configured to use straight line distance calculation, then any job falling outside the circle will be excluded as being beyond max travel distance (e.g. red diamond).



When the system is configured to use the “by road” distance method, then the principles described above will still hold, but the “circle” will be geographically “distorted” based on road distance.

## Why some franchisees are offered jobs further than their max travel distance

When you dial into Google Maps the distance between the franchisee’s location and the job, sometimes Google will give you a travel distance that is further away than a franchisee’s Max Travel Distance, and yet the franchisee may still be offered the job.

This happens when your system is configured to use Straight Line distance processing.



When a franchisee has a Max Travel Distance of 40 km, they may still be offered a job that is 43 km away by road. This is because the job is less than or equal to 40 km away by straight line distance.



Jobs will never be offered further than the Max Travel Distance when the by road distance method is configured.

# Job Statuses

Job Statuses provide a convenient way to keep track of the status of each job. The pathway near the top of the Job Details page provides a visual indicator of the current status of the job.



## Automatic and manual Job Statuses

By managing jobs through each status, Operations Management helps you focus on delighting your customers and growing your business.

Many Job Statuses are set automatically.

- ✓ For example, creating a Job Plan automatically places the Job's Status into *Planning*.

Other Job Statuses allow you to manually set the Status or the Substatus fields.

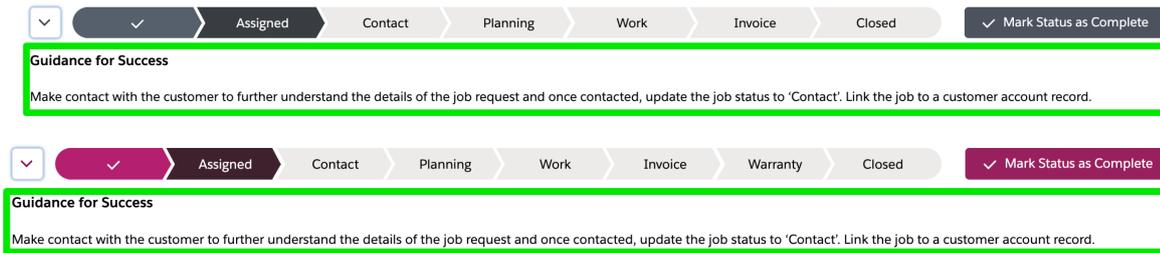
- ✓ For example, if you have Contacted the customer, you need to record the outcome of the contact using the Substatus fields. It allows you to describe whether the contact was Attempted, Successful, On Hold, or whether there is a Pending or Completed Site Visit.

## Guidance for success

You can discover what actions and activities are related to each status by toggling the Show more button on the status pathway.



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



It can be helpful to check **Guidance for Success** to prompt what needs to be done at each status.

### Job status summary

The top-level Job Statuses are described below.

Job Status	Description
Unassigned	A newly-created job before it is assigned to a franchise.
Assigned	A job newly-assigned to a franchise before any attempt to contact the customer has occurred.
Contact	All customer contacts (including attempted contacts) and necessary site visits.
Planning	Determine the tasks, costs and personnel required to complete the job. Schedule the personnel. If a quote is required, generate the quote. Customer accepts the quote.
Work	Work is ready to be scheduled, has commenced, is in progress or is completed.
Invoice	At least one invoice has been generated. Customer has made payments on the invoice. Customer has fully paid the invoice, or the invoice is in dispute.
Closed	The job is complete and payments have been received. The job may automatically close when all invoices attached to the job are fully paid.

Job Substatuses are described below.

Job Status	Substatus	Transition	Description
Unassigned	--None--	Auto	<p>Job is newly created and has not yet been assigned to a Franchisee.</p> <div style="border-left: 2px solid #0070C0; padding-left: 10px; margin-top: 10px;">  <p>This status is now obsolete. Queued for Allocation is used in its place.</p> </div>
	Queued for Allocation	Auto	Job is newly created and is awaiting allocation to a Franchisee.
	In Allocation	Auto	Job is being managed by the Job Allocation System, waiting to be allocated.
	On Hold	Manual	Job has been placed on hold by the Job Allocation system due to inability to assign to a Franchisee. Requires manual intervention in order for it to be assigned to a franchisee.
Assigned	--None--	Auto	Job has been assigned to a franchisee. Franchisee is yet to make contact with the customer.
	Manually Allocated	Auto	Job has been force allocated to a Franchisee. Franchisee is yet to make contact with the customer.

Job Status	Substatus	Transition	Description
Contact	Attempted	Manual	Franchisee has attempted contact (called, sent text or email) without yet making contact.
	Successful	Manual	Franchisee has made contact with the customer.
	Site Visit Pending	Auto	Franchisee has scheduled a site visit. Good practice is to ensure the site visit is recorded within the Job Calendar.
	Site Visit Completed	Manual	Franchisee has visited the site.
	On Hold	Manual	<p>The Job has been temporarily placed on hold for a range of reasons that prevent it proceeding.</p> <p>For example, the customer may be out of town or otherwise unresponsive to contacts.</p> <p>(When it is clear the Job will never proceed, change status to <i>Closed: Not Proceeding</i>.)</p>

Job Status	Substatus	Transition	Description
Planning	In Progress	Auto	<b>Job Planning causes transition.</b> When you begin Job Planning, the system will automatically progress to this Substatus.
	Completed	Manual	Switch to this Substatus when you have completed the Job Planning process.
	Quote Sent	Auto	<b>Quote Job, Email Send causes transition.</b> When you have sent the Quote, system will switch to this Substatus.
	Quote Accepted	Manual	When customer indicates acceptance of quote, manually set to this Substatus.
	On Hold	Manual	When circumstances arise that prevent you from proceeding with Job Planning (e.g. customer unable to provide sufficient information) place it On Hold.

Job Status	Substatus	Transition	Description
Planning	In Progress	Auto	<b>Job Planning causes transition.</b> When you begin Job Planning, the system will automatically progress to this Substatus.
	Completed	Manual	Switch to this Substatus when you have completed the Job Planning process.
	Quote Sent	Auto	<b>Quote Job, Email Send causes transition.</b> When you have sent the Quote, system will switch to this Substatus.
	Quote Call-back	Manual	Customer has received a quote and wants franchisee (or franchise employee) to call back to discuss.
	Quote Accepted	Manual	When customer indicates acceptance of quote, manually set to this Substatus.
	On Hold	Manual	When circumstances arise that prevent you from proceeding with Job Planning (e.g. customer unable to provide sufficient information) place it On Hold.

Job Status	Substatus	Transition	Description
Work	Pending	Manual	<p>Indicates work is being delayed. Reasons include:</p> <ul style="list-style-type: none"> <li>» Waiting for a deposit</li> <li>» Waiting on material or a signature</li> </ul> <p>Selecting a Substatus Reason is mandatory.</p>
	Scheduled	Conditional	<p>Work is scheduled.</p> <div style="border-left: 2px solid #0070C0; padding-left: 10px; margin-top: 10px;">  <p>Automatic transition occurs if the Estimated Hours match Scheduled Hours with 1 hour of variance. Otherwise manual.</p> </div>
	In Progress	Manual	A user has clocked onto the job (from Job Calendar Mobile).
	Completed	Manual	A user has marked the job complete (from Job Calendar Mobile).
	On Hold	Manual	Work cannot proceed due to factors outside your control (e.g. waiting on other trades, customer denies access to work site, etc.)

Job Status	Substatus	Transition	Description
Invoice	In Progress	Auto	Invoice is generated causes transition. You have generated the invoice.
	Completed	Manual	Customer has paid the invoice.
			 <p>This status not used when Franchise Profile Account's Auto Close Job on Final Payment is checked.</p>
Dispute	Manual	Customer is disputing the invoice.	
Warranty	Pending	Manual	<p>Pending warranty have two Sub Status Reasons</p> <ul style="list-style-type: none"> <li>» Material and Signature</li> <li>» Waiting on Deposit</li> </ul>
	In progress	Manual	Warranty Jobs that are in progress have begun the warranty repair work.
	Completed	Manual	Warranty Jobs that have been completed.
	On Hold	Manual	Warranty Jobs that have been placed on hold for any reason.

Job Status	Substatus	Transition	Description
Closed	Completed	Auto	Invoice is paid and the Franchise Profile Account's Auto Close Job on Final Payment is checked causes transition. All work is complete and invoice has been paid in full.
	Not Proceeding	Manual	Job will not proceed and is not being followed up.



- » All Sub Statuses having Auto transitions can also be placed in that Sub Status manually.
- » You can prevent automatic transitions from occurring by checking the Manual Status Update checkbox. This is extremely useful when you are part invoicing a job while work is still progressing. By checking Manual Status Update you can retain the status of *Work-In Progress* despite having put through a part invoice.



# CHAPTER 8

## Job Offer Notifications

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# Understanding job offer notifications

Operations Management provides the ability to notify the franchisees about job offers using email or SMS.



Distributing Job Offers through SMS requires licensing the SMS Management option.

When you have configured either Two Way Email or Two Way SMS, franchisees can choose to respond to these notifications via email or SMS.

This manual discusses the configuration of Two Way Email. The SMS Management is an option described in its own manual.

# How to configure email templates for two way email

Two Way Email requires three email templates to be configured

- » Job Offer Email Template
- » Accepted or Declined Job Offer Template
- » Expired or Timeout Job Offer Template

## To edit each template

- » See “How to configure Classic Email Templates” on page 188.

## To configure each template within the Configuration Set

- » Insert the API Name of each template into the corresponding template field within the Configuration Set.

The screenshot shows the Salesforce Configuration Set for 'CN-00001' under 'Job Allocation Settings'. The 'Job Offer Email Template' field is highlighted in green. The configuration includes various settings such as Job Type Eligibility (Off), Eligibility Criteria Logic (1 AND 2), Geo-coding Minimum Level (Rooftop), Job Offer Processing (Sequential), Distance Calculation (Straight Line), Distance Units (Kilometres), Org Wide Email Address Name (Job Offer), and Job Offer Email Template (Default\_Job\_Offer\_Template). Other fields include Timeout Per Offer (15), Timeout Per Job (120), Customer Matching Criteria, Job Allocation Queue Name (Default Job Queue), No Timeout In Owned Area, One Offer At A Time, Offer Owned Area 24/7, Offer Inside Contact Hours Only, Queue In Territory Offers, and Force Allocation Email Template.



# CHAPTER 9

## Working with SMS Reminders

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# Understanding SMS Reminders

SMS Reminders can be scheduled to remind customers or assignees (i.e. employees or contractors) about up-coming appointments. SMS Reminders are optionally registered through switching on Customer or Assignee Reminders within the Job Calendar Event Detail dialog.

## Registering SMS Reminders

SMS Reminders are registered through the creation of Reminder records. Reminder records are periodically scanned and updated based on changes that have occurred within the Job Calendar.



You can access the Reminders records from the Salesforce menu pencil icon.

## Who reminders are sent to

Customer Reminders are sent to the number from the **Job** *Mobile* field.

Assignee Reminders are sent to the number from the **User** *Mobile* field.

## What times are reported

Times are localized based on the timezones of the Territory and Assignee.



### Customer Time

Customer Reminders report the time of the appointment in the Territory's timezone. When the Job is not associated with a Territory, the Customer Reminder reports the time of the appointment in the Assignee's timezone.



### Assignee Time

Assignee Reminders always report the time of the appointment in the Assignee's timezone, even if the Job is in a different timezone.

This means that a Customer Reminder may report a 10:00 am appointment start, while the Assignee Reminder may report a 9:00 am appointment start if the Assignee's timezone is one hour different from the timezone of the Territory in which the Job is located.

## When reminders are sent

You can expect customer and assignee reminders to be sent as follows

- » Customer reminders – 24 hours before the event

- » Assignee reminders – 1 hour before the event

There are several exceptions to the above timings

- » SMS publishing window
- » reminder blackout period
- » appointments set in the past

Each of these exceptions is explained below.

### **SMS publishing window**

There is a system-wide calendar which defines when reminders may be sent. Franchisees do not have control over this calendar; only system administrators do. Your system administrator will have defined

- » the earliest time in a day a reminder may be sent
- » the latest time in a day a reminder may be sent
- » on which days of the week reminders may be sent

If the reminder is scheduled to send outside the SMS publishing window, it will reschedule the reminder to be sent during an earlier publishing window.



#### **Timezone**

The timezone used for the SMS publishing window is

- » the timezone of the territory in which the job is located, OR
- » the timezone of the assignee (when the job is not assigned to a territory)

### **Reminder blackout period**

There is a reminder blackout period that applies to customer reminders (but not assignee reminders).

If the appointment would have generated a reminder that falls within the next 12 hours from now, no reminder will be sent.



#### **Why the blackout period?**

We assume that if you're only just now booking in an appointment for tomorrow, that you will have spoken with the customer just now and therefore not need to remind them of the appointment.

### **Appointments set in the past**

Reminders are not sent for any appointments created for a past date or time.

## How SMS Reminder records are generated and updated

Reminder scheduling (and updating) is performed by the **Scheduled Job** OPS Reminder Scheduler. OPS Reminder Scheduler operates periodically, ensuring the information in the Job Calendar is updated into the Reminders records.

## How SMS Reminders are sent

The sending of SMS Reminders is triggered by the **Scheduled Job** SMS Reminder Scheduler. SMS Reminder Scheduler requires the presence of reminder journeys within the SMS Management product. Typically customer implementations will have the following SMS Reminder Journeys configured

- » Assignee Reminder
- » Customer Reminder

SMS Reminder Journeys are dependent on the SMS components of the relevant Configuration Record being correctly configured. They are also dependent on the Twilio SMS Gateway being correctly configured.



SMS Reminder templates are configured in their respective SMS Reminder Journey.

# How to configure the SMS publishing window

The SMS publishing window is set globally for the system. By default, SMS Reminders can be sent 24x7. Once a publishing window has been established, SMSs will only be sent during a publishing window.

## To set the SMS publishing window

1. Go to **Setup > Company Settings**.
2. Choose **Business Hours**.
3. **Edit** the `Default` entry.
4. Set the **Time Zone** and the **Business Hours** for the entry. Press **Save** when you're finished.

The screenshot shows the 'Organization Business Hours' configuration page. The page has a sidebar with 'Company Settings' expanded to 'Business Hours'. The main content area is titled 'Organization Business Hours' and includes a 'Business Hours Edit' form. The form has three steps:

- Step 1. Business Hours Name:** The 'Business Hours Name' field is set to 'Default'. There is a 'Use these business hours as the default' checkbox which is checked.
- Step 2. Time Zone:** The 'Time Zone' dropdown is set to 'GMT+11:00 Australian Eastern Daylight Time (Australia/Sydney)'.
- Step 3. Business Hours:** A table for selecting business hours for each day of the week. The table has columns for the day, start time, end time, and a checkbox for '24 hours'. All checkboxes are currently unchecked.

Day	Start Time	End Time	24 Hours
Sunday	7:00 AM	to 7:00 PM	<input type="checkbox"/>
Monday	7:00 AM	to 7:00 PM	<input type="checkbox"/>
Tuesday	7:00 AM	to 7:00 PM	<input type="checkbox"/>
Wednesday	7:00 AM	to 7:00 PM	<input type="checkbox"/>
Thursday	7:00 AM	to 7:00 PM	<input type="checkbox"/>
Friday	7:00 AM	to 7:00 PM	<input type="checkbox"/>
Saturday	7:00 AM	to 7:00 PM	<input type="checkbox"/>



You can establish public holiday schedules by creating new entries for **Organization Business Hours**.

# How to configure the reminder blackout period

The reminder blackout period is not currently configurable.

- » Customer reminders are not sent if their scheduled send date is within 12 hours of now
- » Assignee reminders are not subject to the reminder blackout period

# CHAPTER 10

## Working with Material Price Lists

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# Understanding material price lists

Material Price Lists support job costing and estimation.

They are used in the Job Planning process to provide a ready menu of materials that are regularly used (with the pricing provided by particular suppliers). This feature supports up-front estimation of job profitability by enabling the franchisee to estimate the gross profit of each job.

The screenshot displays the Salesforce Job Planning interface. At the top, there is a search bar and navigation tabs including Business Management, Home, Chatter, Accounts, Jobs, Job Offers, Job Schedule, Invoices, Job Planning, and More. The Job Planning section shows a job summary for Job Number JN-00166, with an Estimated Labour Price of \$240.00 and an Estimated Material Price of \$682.50. Below this, the 'Roofing' job is selected, and a material selection interface is shown. A search bar contains the word 'Yellow', and a dropdown menu shows the selected material: 'MN-00001 Dulux · 10 · Yellow Paint · 55.00'. To the right, there are summary tables for 'Roofing Summary' and 'Labour Summary'. The 'Roofing Summary' table shows Amount \$922.50, Tax 10%, Cost \$675.00, Profit \$247.50, and Total \$1,014.75. The 'Labour Summary' table shows Cost \$150.00, Amount \$240.00, and Profit \$90.00.

Franchisors can create Material Price Lists that are visible by all their franchisees. You may choose to create multiple price lists, e.g.

1. A franchisor price list for all consumables supplied by the master franchise.
2. One or more outside supplier price lists.

Each price list is created for a specific supplier. Multiple suppliers requires multiple price lists.



There may be a need for some master franchisors to create regional price lists. If this is the case, then there needs to be a regional Master Franchise Profile Account that serves as the master for the Franchise Profile Accounts. Each Franchise Profile Account would then belong to one of the regional Master Franchise Profile Accounts. This setup is best configured during implementation.

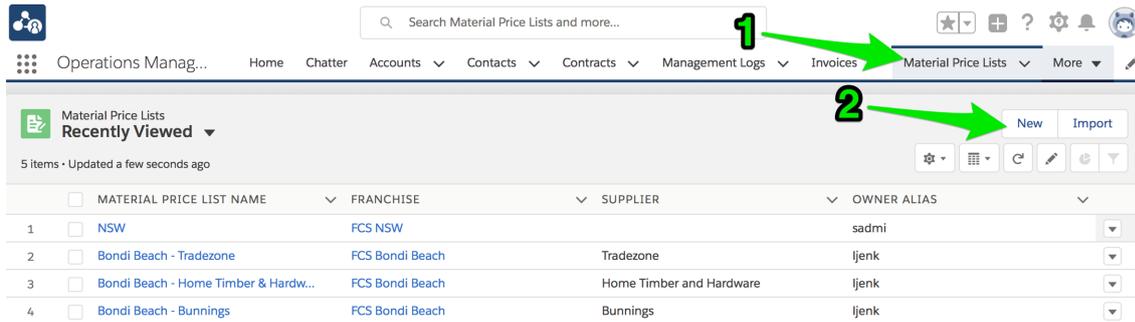
# Creating a material price list

Each price list contains items from a single supplier. When you add a new supplier, you should consider adding a new price list for that supplier.

Some price lists may be shared between multiple companies, while other price lists are owned by the franchisee. Franchisees own any price lists they create.

## To create a price list

1. From the **Material Price Lists** tab, press **New**.



The screenshot shows the 'Material Price Lists' interface. A search bar at the top contains the text 'Search Material Price Lists and more...'. A green arrow labeled '1' points to the search bar. Below the search bar is a navigation menu with tabs: 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Material Price Lists', and 'More'. A green arrow labeled '2' points to the 'New' button in the top right corner of the interface. Below the navigation menu is a header for 'Material Price Lists' with a 'Recently Viewed' dropdown. Below the header is a table with 5 items, updated a few seconds ago. The table has columns for 'MATERIAL PRICE LIST NAME', 'FRANCHISE', 'SUPPLIER', and 'OWNER ALIAS'. The table contains 4 rows of data.

	MATERIAL PRICE LIST NAME	FRANCHISE	SUPPLIER	OWNER ALIAS
1	NSW	FCS NSW		sadmi
2	Bondi Beach - Tradezone	FCS Bondi Beach	Tradezone	ljenk
3	Bondi Beach - Home Timber & Hardw...	FCS Bondi Beach	Home Timber and Hardware	ljenk
4	Bondi Beach - Bunnings	FCS Bondi Beach	Bunnings	ljenk

The **New Material Price** list dialog box displays.

2. Enter the Material Price List Name, the Franchise, and the Supplier, then press **Save**.

New Material Price List

---

**Information**

\* Material Price List Name

Owner  
Loryn Jenkins

\* Franchise

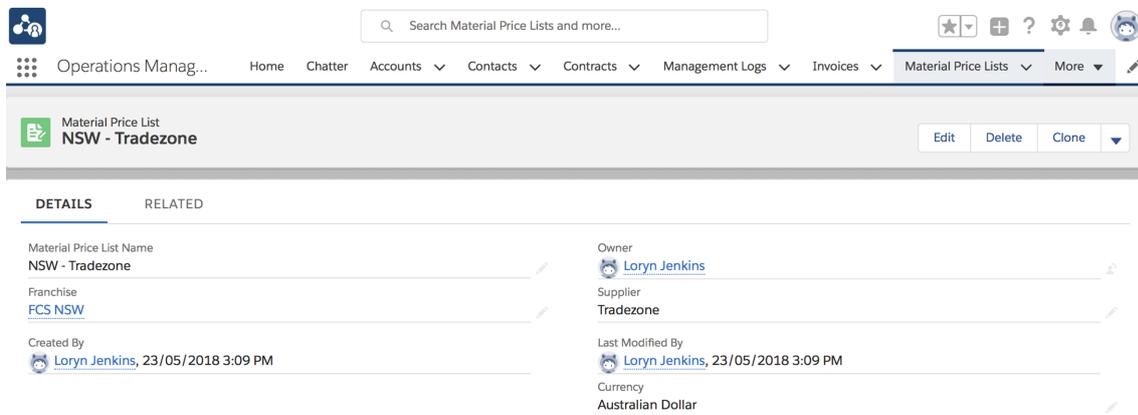
Supplier

**System Information**

Currency



The new price list displays.



The screenshot shows the 'Material Price List' details for 'NSW - Tradezone'. The interface includes a search bar, navigation tabs, and a details section with the following information:

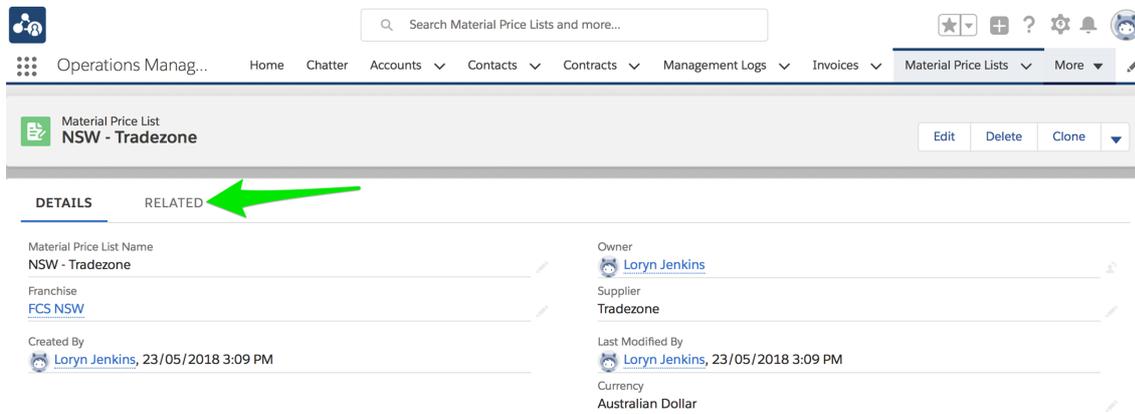
DETAILS	RELATED
Material Price List Name NSW - Tradezone	Owner Loryn Jenkins
Franchise FCS NSW	Supplier Tradezone
Created By Loryn Jenkins, 23/05/2018 3:09 PM	Last Modified By Loryn Jenkins, 23/05/2018 3:09 PM
	Currency Australian Dollar

# Adding a material

Once you have created a price list, you will want to add the most commonly purchased items from that supplier to the price list.

## To add a material to a price list

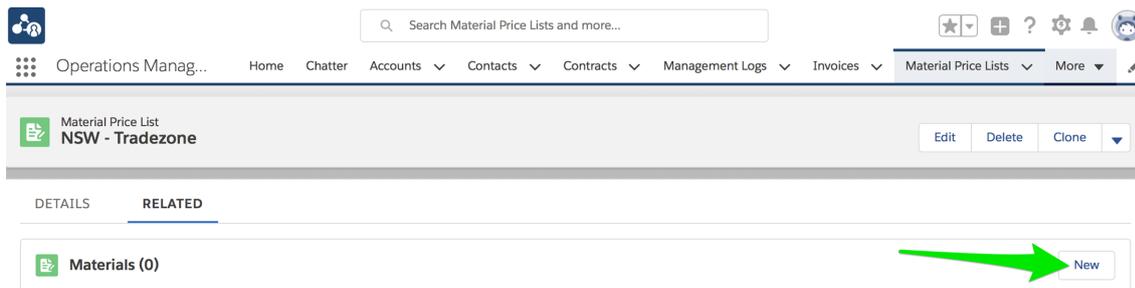
1. From the **Material Price List**, select the **Related** tab.



The screenshot shows the 'Material Price List' interface for 'NSW - Tradezone'. The 'RELATED' tab is selected, indicated by a green arrow. The interface includes a search bar at the top, navigation tabs (Operations Manag..., Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, Material Price Lists, More), and a list of details for the price list. The details are organized into two columns:

Field	Value
Material Price List Name	NSW - Tradezone
Franchise	FCS NSW
Created By	Loryn Jenkins, 23/05/2018 3:09 PM
Owner	Loryn Jenkins
Supplier	Tradezone
Last Modified By	Loryn Jenkins, 23/05/2018 3:09 PM
Currency	Australian Dollar

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



The screenshot shows the 'Materials' section of the interface. The 'RELATED' tab is selected. Below the 'Materials (0)' heading, there is a 'New' button, which is highlighted with a green arrow.

The **New Material** dialog box displays.

### 3. Enter all the relevant material details.

#### New Material

#### Information

Material Number	Price 15.00
* Product Name 36 Watt BSD Series LED - Frosted Diffuser - White	Currency Australian Dollar
Quantity Unit Of Measure Each	Safety Data Sheet Issue Date
Size	Safety Data Sheet Product Name
Supplier Davis Lighting	Safety Data Sheet Required <input type="checkbox"/>
Supplier Part Number BSD4364K	
Description 36 Watt BSD Series LED Slimline Batten IP40 With Frosted Diffuser 4000K 4320lm White	
* Material Price List NSW - Tradezone	

Cancel Save & New Save

The new material record is added to the price list.

Operations Manag... Home Chatter Accounts Contacts Contracts Management Logs Invoices Material Price Lists More

Material Price List  
NSW - Tradezone Edit Delete Clone

DETAILS RELATED

Materials (1) New

MATERIAL NUMBER	PRODUCT NAME	QUANTITY UNIT OF MEASURE	DESCRIPTION
MN-00014	36 Watt BSD Series LED - Frosted Diffuse...	Each	36 Watt BSD Series LED Slimline Batten L...

View All



If there are a large number of supplier materials, it may be quicker for your system administrator to import them.

# Importing and updating material price lists from a spreadsheet

To import or update a price list from a spreadsheet

1. Prepare your price list data in a spreadsheet. It helps to make one spreadsheet per supplier.



It is helpful to generate a template with the right headers already defined. You can use the template to create your price list in a spreadsheet, and then import the spreadsheet into Salesforce.

Refer to Salesforce Knowledge Base Article, [Create an import template file which will create all the header definitions as defined by Salesforce.](#)

2. From the **Material Price Lists** tab, press **Import**.

	MATERIAL PRICE LIST NAME	FRANCHISE	SUPPLIER	OWNER ALIAS
1	<input type="checkbox"/> Bondi Beach - Tradezone	FCS Bondi Beach	Tradezone	ljenk
2	<input type="checkbox"/> NSW - Tradezone	FCS NSW	Tradezone	ljenk
3	<input type="checkbox"/> NSW	FCS NSW		sadmi

The Salesforce Data Import Wizard displays.

3. Select the **Custom Object** named **Material Price Lists**.

Let's do this

Choose data      Edit mapping      Start import

Import your Data into Salesforce  
You can import up to 50,000 records at a time.

What kind of data are you importing? **Custom objects**

Material Price Lists

What do you want to do?      Where is your data located?

Cancel   Previous   Next

4. Follow the on-screen prompts and instructions.



For more help using the Salesforce Data Import Wizard, Refer to Salesforce documentation, [Import Data with the Data Import Wizard](#).

# CHAPTER 11

## Working with Xero Integration

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# Understanding Xero integration

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

## What data is exchanged

Operations Management exchanges the following financial records

- » Accounts
- » Invoices
- » Payments
- » Credit Notes
- » Credit Allocations

This data is replicated from Salesforce to Xero. Changes made in Xero are synchronized back to Salesforce.



Supplier Invoices can optionally be sent to Xero. Supplier Invoices don't sync back from Xero to Salesforce.

## When data is exchanged

Syncing occurs when an invoice (and its associated payments and allocations) is created in a Master Franchise Profile Account whose Financial Integration Connector is connected to Xero.

When you create a new invoice, payment, credit note or credit allocation in a Xero account that is connected to Operations Management, changes are replicated back to Operations Management in the next sync cycle. The frequency of the sync cycle is determined by the setting of the Master Franchise Profile Account's **Configuration Set**.

# How to connect to Xero

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

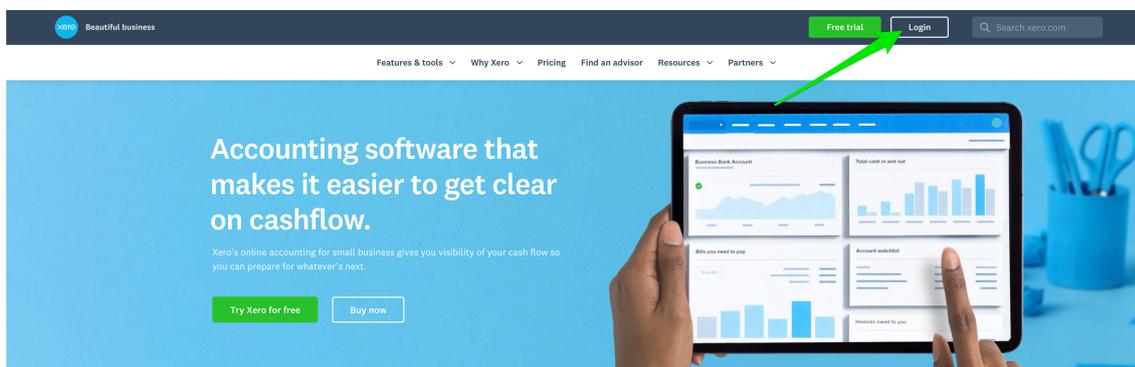
## To connect your Master Franchise Profile Account to Xero

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

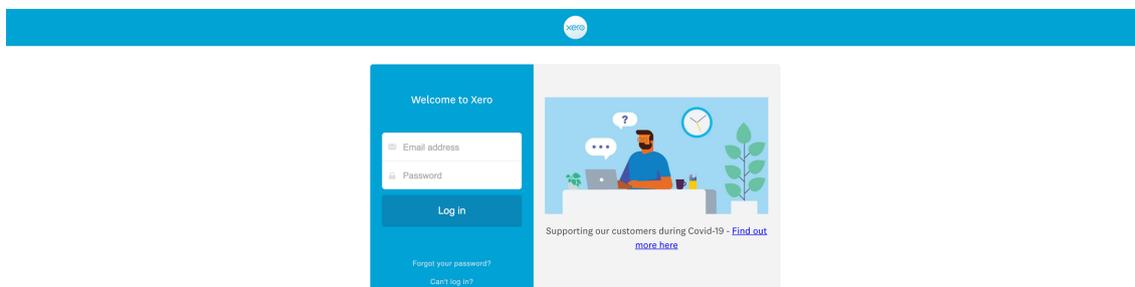
How to do this is described below.

## To login to Xero

1. Go to the Xero website [www.xero.com.au](http://www.xero.com.au) and click the **Login** button.



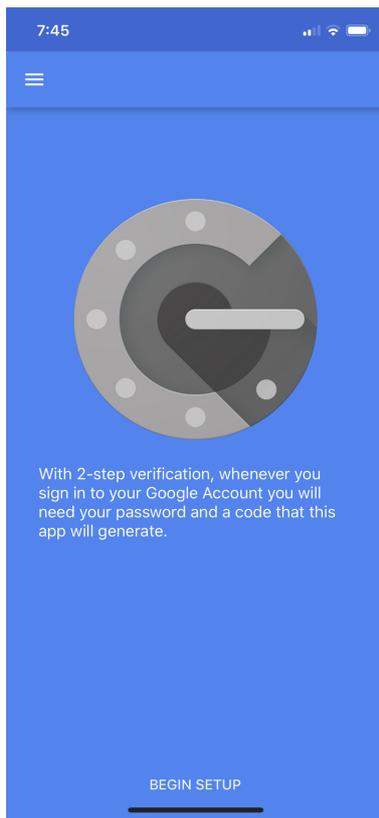
2. Now enter your Email address and Password then press **Log in**.



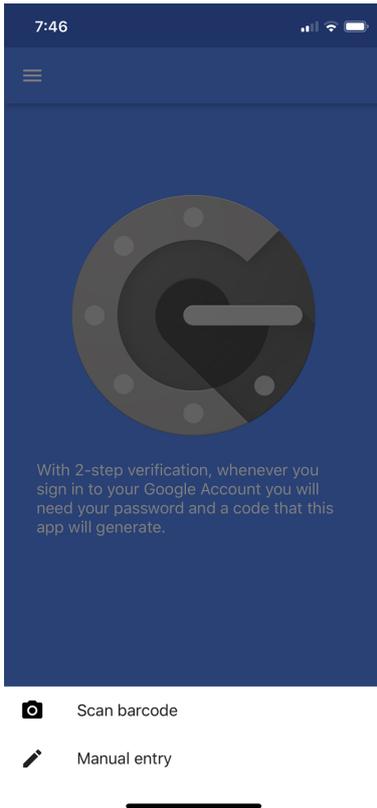
3. Xero may prompt you to set up two-step authentication. Press **Set up two-step authentication** to continue.



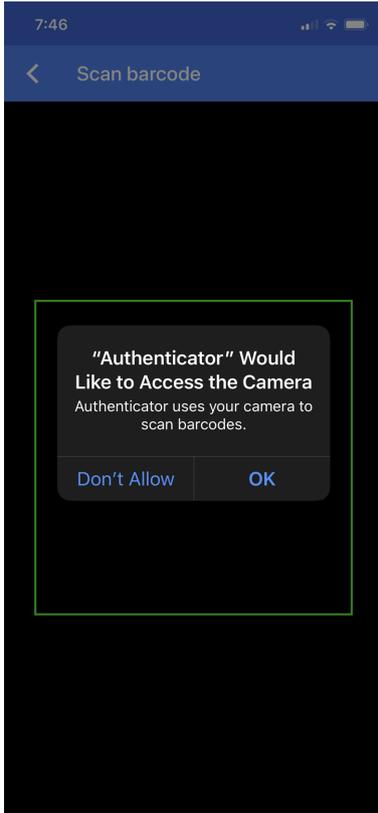
4. If you don't already have the Google Authenticator app on your mobile phone, go to the App Store (for iPhone) or Google Play (for Android) and download the Google Authenticator app.



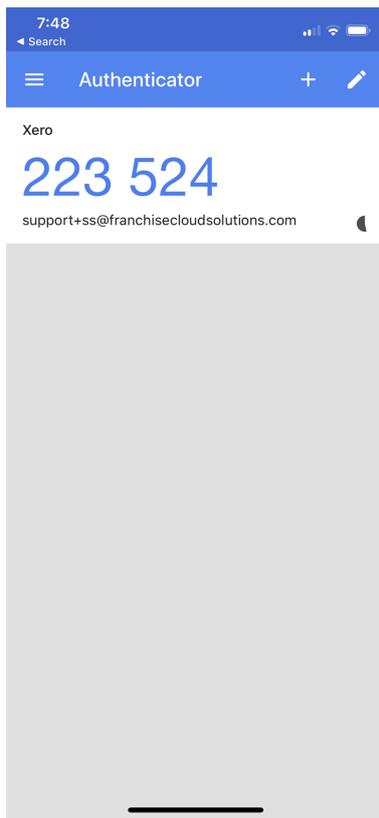
5. If this the first time you've used Google Authenticator, tap **Begin Setup** (otherwise, tap the + button) then tab **Scan barcode**.



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



7. Now point the camera at the QR code on the screen. The camera will recognize the code and create the authentication key on your phone. The authentication key shows a time-limited code that changes regularly.



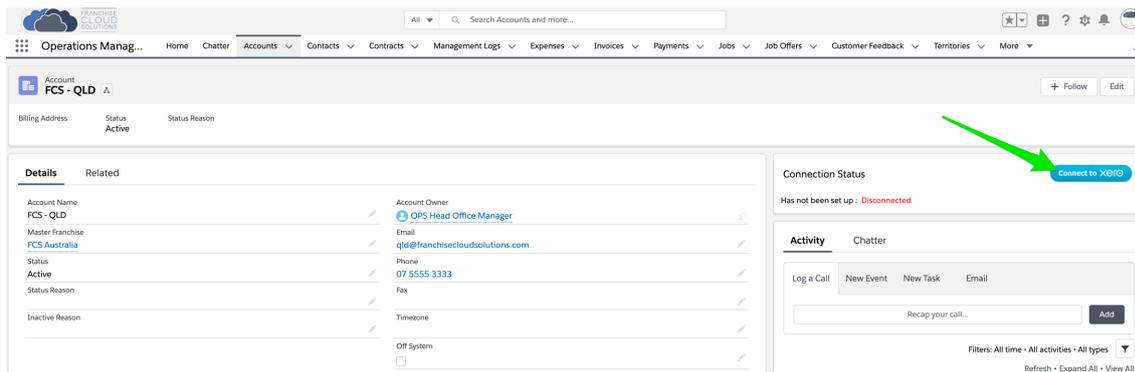
8. Enter the six digit code and press **Log in**.



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

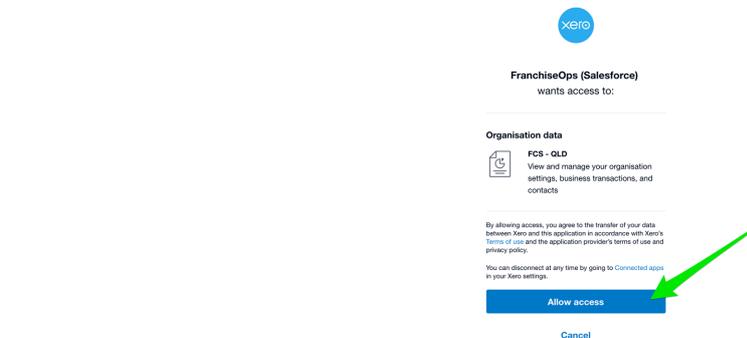
## To connect to Xero

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



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

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



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

### 3. Select appropriate values for the Account Code Mapping Setup and press Save.

Account Code Mapping Setup

* Default Account Code Invoice / Credit Note Lines 11000-00 - Sales	* Default Account Code Payments / Credit Allocations 66000-00 - Receivables
* Default Account Code Supplier Invoice 22000-00 - Cost of Goods Sold	
* Credit Note Status AUTHORISED	* Invoice Status AUTHORISED
* Revenue Inc Tax Code GST on Income	* Revenue Exempt Tax Code GST Free Income
* Expense Inc Tax Code GST on Expenses	* Expense Exempt Tax Code GST Free Expenses
* Select Currency Enabled Currencies	Selected Currencies Australian Dollar

Cancel Save



The above image shows a mapping to an edited Xero chart of accounts. When you edit your Xero chart of accounts, you can review the mapping to ensure Operations Management is still pushing to the right accounts.

### 4. Your Operations Management account is now connected.

Operations Manag... Home Chatter Accounts Contacts Contracts Management Logs Expenses Invoices Payments Jobs Job Offers Customer Feedback Territories More

Account FCS - QLD The financial system has been setup successfully. + Follow Edit

Billing Address Status Active Status Reason

Details	Related
Account Name FCS - QLD	Account Owner QPS Head Office Manager
Master Franchise FCS Australia	Email ql@franchisecloudsolutions.com
Status Active	Phone 07 5555 3333
Status Reason	Fax
Inactive Reason	Timezone
	Off System

Business Information

Connection Status - OAuth 2.0  
FCS - QLD : Connected View Mapping Disconnect

Activity Chatter

Log a Call New Event New Task Email

Recap your call... Add

Filters: All time - All activities - All types

Refresh Expand All View All

Ucommine & Overdue



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



If at any time you need to revise the mapping for a connected account, simply press **View Mapping**. You will be able to edit and save the mapping while it is still connected.

# Understanding syncing and sync records

## Sync Statuses

When you are connected to Xero, your financial records will have an icon showing the sync status of that record. Operations Management works by pushing financial information to the financial system and then pulling it back.

Changes in Operations Management are immediately pushed to Xero.

Operations Management checks periodically to see if data has been changed within Xero. The frequency at which it is checked is determined by the *Sync Frequency* value in the **Configuration Set** attached to the Master Franchise Profile Account. If data has changed then it is pulled back to Operations Management.

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

The following table describes the meaning of each sync status.

Icon	Meaning
	Sync has not been attempted.
	The record has been pushed to the financial system and pulled back successfully.
	The record has been pushed to the financial system but not yet pulled back from it.
	The record has been pulled from the financial system.
	Attempt to push the record to the financial system has failed.

## Types of sync records

There are three types of Sync records.

## » Automated Sync Request records.

The screenshot shows the Salesforce interface for Sync S024482. The 'DETAILS' tab is active, displaying the following information:

Sync Name	S024482	Franchise	VIC Master
Request Sent Time		Invoice	
Response Received Time		Sync Status	Succeeded
Error Message		Number Of Records	
Parent Sync		From Date	27/08/2018 3:27 PM
Type	Automatic	To Date	27/08/2018 3:42 PM
Created By	Integration User, 27/08/2018 3:42 PM	Owner	Integration User
Currency	Australian Dollar	Last Modified By	Integration User, 27/08/2018 3:42 PM

The 'Parent Sync' field is highlighted with a green border. The 'ACTIVITY' tab on the right shows filters for 'All time', 'All activities', and 'All types', with a 'Refresh' and 'Expand All' option. Below the filters, there are sections for 'Next Steps' (with a 'More Steps' button) and 'Past Activities' (with a 'Load More Past Activities' button).

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

## » Manual Sync Request records.

The screenshot shows the Salesforce interface for Sync S024500. The 'DETAILS' tab is active, displaying the following information:

Sync Name	S024500	Franchise	VIC Master
Request Sent Time	27/08/2018 12:00 PM	Invoice	
Response Received Time		Sync Status	In Progress
Error Message		Number Of Records	
Parent Sync		From Date	27/08/2018 3:58 PM
Type	Manual	To Date	27/08/2018 3:59 PM
Created By	Loryn Jenkins, 27/08/2018 4:01 PM	Owner	Loryn Jenkins
Currency	Australian Dollar	Last Modified By	Loryn Jenkins, 27/08/2018 4:01 PM

The 'ACTIVITY' tab on the right shows filters for 'All time', 'All activities', and 'All types', with a 'Refresh' and 'Expand All' option. Below the filters, there are sections for 'Next Steps' (with a 'More Steps' button) and 'Past Activities' (with a 'Load More Past Activities' button).

These are Sync operations initiated by a system administrator. You can recognize them by seeing they are of `TypeManual`, and the `Parent Sync` field is empty.

## » Child Sync Response records.

The screenshot shows a Salesforce record for a Sync with ID S024484. The record is titled "Sync S024484" and has buttons for "Edit", "Delete", and "Change Owner". The record is categorized under "Operations Manag...".

The record details are as follows:

RELATED	DETAILS
Sync Name S024484	Franchise <a href="#">VIC Master</a>
Request Sent Time	Invoice
Response Received Time	Sync Status <b>Succeeded</b>
Error Message	Number Of Records
Parent Sync <a href="#">S024482</a>	From Date
Type	To Date
Created By <a href="#">Integration User</a> , 27/08/2018 3:42 PM	Owner <a href="#">Integration User</a>
Currency Australian Dollar	Last Modified By <a href="#">Integration User</a> , 27/08/2018 3:42 PM

The "Parent Sync" field is highlighted with a green box. The "Sync Status" is "Succeeded".

The "ACTIVITY" section shows filters: "All time · All activities · All types". There are buttons for "Refresh" and "Expand All".

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

**Past Activities**: No past activity. Past meetings and tasks marked as done show up here. Load More Past Activities button.

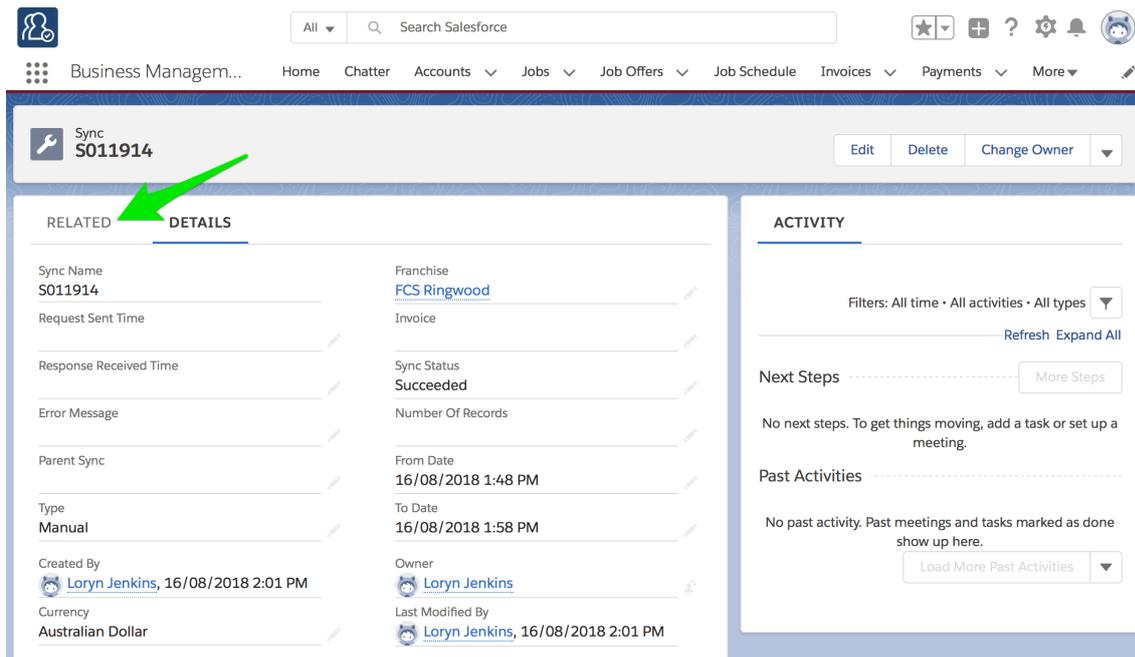
Each Request record has one or more child Response records associated with it. Each Response record is a child of the Request record. You recognize a Response record because it has the name of its parent within the `Parent Sync` field.

## Sync attachments

Sync attachments help system administrators gain more insight into synchronization.

## To explore Sync attachments

1. From any Request Sync record, select the Related tab.

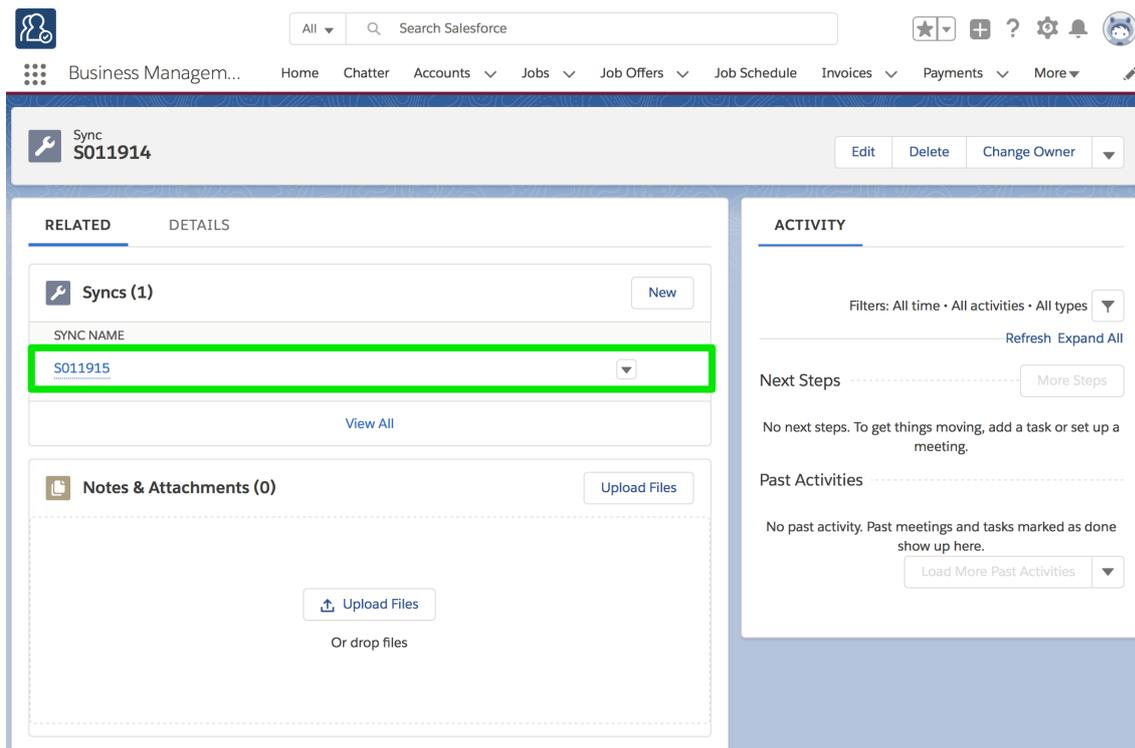


The screenshot shows the Salesforce interface for a Sync record with ID S011914. The 'RELATED' tab is selected, indicated by a green arrow. The record details are as follows:

Sync Name	S011914	Franchise	<a href="#">FCS Ringwood</a>
Request Sent Time		Invoice	
Response Received Time		Sync Status	Succeeded
Error Message		Number Of Records	
Parent Sync		From Date	16/08/2018 1:48 PM
Type	Manual	To Date	16/08/2018 1:58 PM
Created By	<a href="#">Loryn Jenkins</a> , 16/08/2018 2:01 PM	Owner	<a href="#">Loryn Jenkins</a>
Currency	Australian Dollar	Last Modified By	<a href="#">Loryn Jenkins</a> , 16/08/2018 2:01 PM

The 'ACTIVITY' section on the right shows filters for 'All time', 'All activities', and 'All types'. It includes sections for 'Next Steps' (with a 'More Steps' button) and 'Past Activities' (with a 'Load More Past Activities' button). Both sections indicate no next steps or past activities are currently visible.

2. The Responses to this Request are listed within the Syncs list.



The screenshot shows the same Salesforce Sync record S011914, but now the 'Syncs' list is visible. The list contains one entry, S011915, which is highlighted with a green box. Below the list, there is a 'View All' link. The 'Notes & Attachments' section shows zero items and includes an 'Upload Files' button and a message 'Or drop files'.

There are no Attachments to a Request Sync. The Attachments are listed on the Response Sync.

### 3. Select one of the Response Syncs.

The screenshot shows the Salesforce interface for a Sync record. The top navigation bar includes the user profile, search bar, and various utility icons. The main header shows the Sync name 'S011914' and action buttons 'Edit', 'Delete', and 'Change Owner'. The 'RELATED' tab is active, displaying a list of 'Syncs (1)'. A green arrow points to the 'S011915' link in this list. Below the syncs list is a 'Notes & Attachments (0)' section with an 'Upload Files' button. The 'ACTIVITY' panel on the right shows filters and options for 'Next Steps' and 'Past Activities'.

### 4. Choose the Related tab, and note the Request and Response Attachments.

The screenshot shows the Salesforce interface for a Sync record. The top navigation bar is identical to the previous screenshot. The main header shows the Sync name 'S011915' and action buttons 'Edit', 'Delete', and 'Change Owner'. The 'RELATED' tab is active, displaying a list of 'Syncs (0)'. Below this is a 'Notes & Attachments (4)' section with an 'Upload Files' button. A green box highlights four attachments: 'Request 01.txt', 'Response 01.txt', 'Request 02.txt', and 'Response 02.txt'. The 'ACTIVITY' panel on the right is also visible, showing filters and options for 'Next Steps' and 'Past Activities'.

# How to control the scope of syncing

You can independently configure the following sync behavior on each financial record type

- » Direction of sync - to the financial system or from the financial system
- » Sync mode - manual or automatic

The financial record types that can be so modified are

- » Accounts
- » Invoices
- » Payments
- » Credit Notes
- » Credit Allocations

See “How to configure financial syncing” on the facing page.



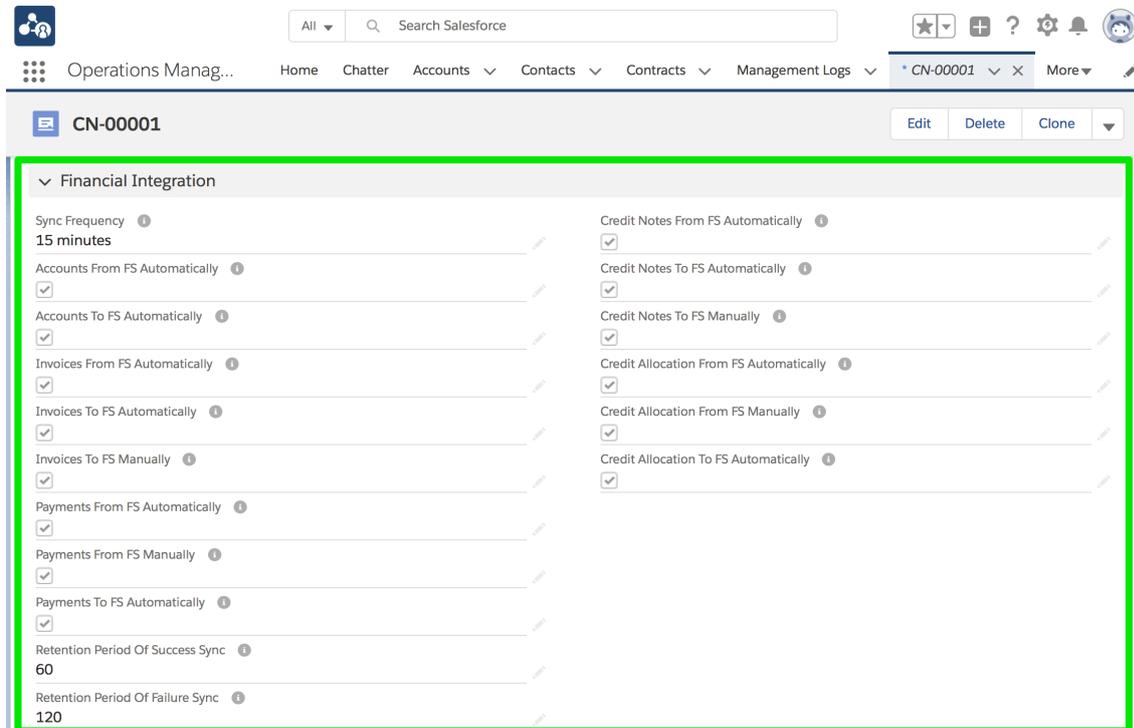
Switching off every check box in the **Financial Integration** section of the **Configuration** record will prevent all synchronization with external financial systems.

# How to configure financial syncing

The Sync configuration for the Master Franchise controls the frequency and scope of records that are synced for the Master Franchise and all franchisees.

## To configure automatic syncing

1. From the Master Franchise Profile Account's **Configuration Set**, locate the **Financial Integration** section.



2. Ensure that each of the financial records you know need to be synced actually are being synced.
3. Determine whether one-way or two-way syncing is required and set the fields in keeping with the desired policy.
4. Ensure the Sync Frequency is set at an appropriate level of granularity. This will control the frequency with which syncs from Xero to Salesforce occur.



Consult the on-screen field notes for a definition of each setting shown in the above image.



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

# How to find the most recent sync



This topic assumes you have connected your Xero account. See “How to connect to Xero” on page 115.

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

## To check the most recent sync period

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

The screenshot shows the Salesforce interface for the 'VIC Master' account. The 'Related' tab is selected, and the 'Details' section is active. The 'Details' section shows the following information:

Field	Value
Account Name	VIC Master
Master Franchise	Australia Master
Status	Active
Status Reason	
Inactive Reason	
Account Owner	VIC Finance Manager
Email	
Phone	
Fax	
Timezone	Australia/Melbourne

The 'Connection Status' is 'Connected'. There are buttons for 'View Mapping' and 'Disconnect'. The 'Activity' section is also visible, showing an 'Email' field and a 'Create new...' button.

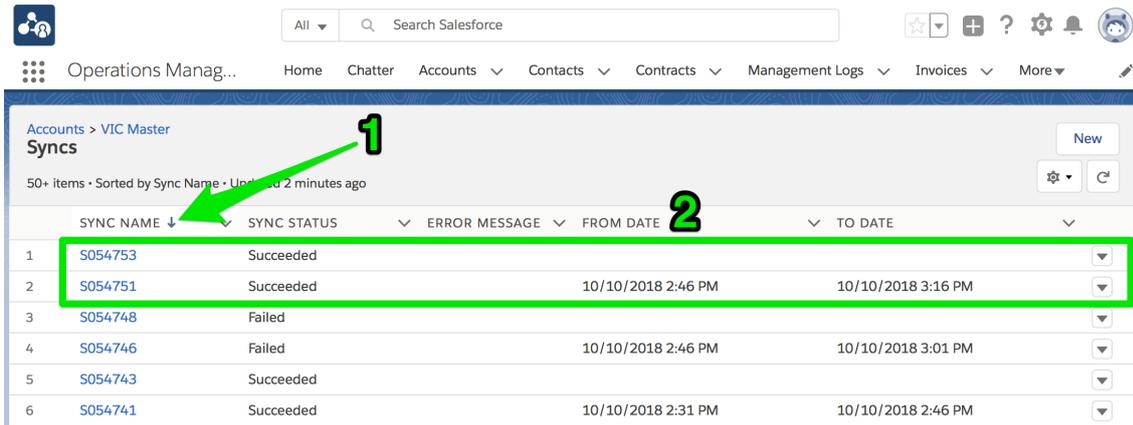
2. Scroll down to the **Syncs** section, then press **View All**.

The screenshot shows the Salesforce interface for the 'VIC Master' account. The 'Syncs' section is visible, showing a table of syncs. A green arrow points to the 'View All' link at the bottom of the table.

SYNC NAME	SYNC STATUS	ERROR MESSAGE	FROM DATE
<a href="#">S054753</a>	Succeeded		
<a href="#">S054751</a>	Succeeded		10/10/2018 2:46...
<a href="#">S054748</a>	Failed		
<a href="#">S054746</a>	Failed		10/10/2018 2:46...
<a href="#">S054743</a>	Succeeded		
<a href="#">S054741</a>	Succeeded		10/10/2018 2:31...

View All

3. Click on the Sync Name column to order newest to oldest.



The screenshot shows the Salesforce interface for 'Accounts > VIC Master Syncs'. The table is sorted by Sync Name. A green arrow labeled '1' points to the 'SYNC NAME' column header. A green box labeled '2' highlights the first two rows of the table, which represent the most recent syncs.

	SYNC NAME	SYNC STATUS	ERROR MESSAGE	FROM DATE	TO DATE
1	S054753	Succeeded			
2	S054751	Succeeded		10/10/2018 2:46 PM	10/10/2018 3:16 PM
3	S054748	Failed			
4	S054746	Failed		10/10/2018 2:46 PM	10/10/2018 3:01 PM
5	S054743	Succeeded			
6	S054741	Succeeded		10/10/2018 2:31 PM	10/10/2018 2:46 PM

The most recent set of syncs is given by the latest Sync records.

4. Check the From Date and the To Date in the most recent automated sync to determine when the most recent sync occurred.

# How to prevent historical syncing

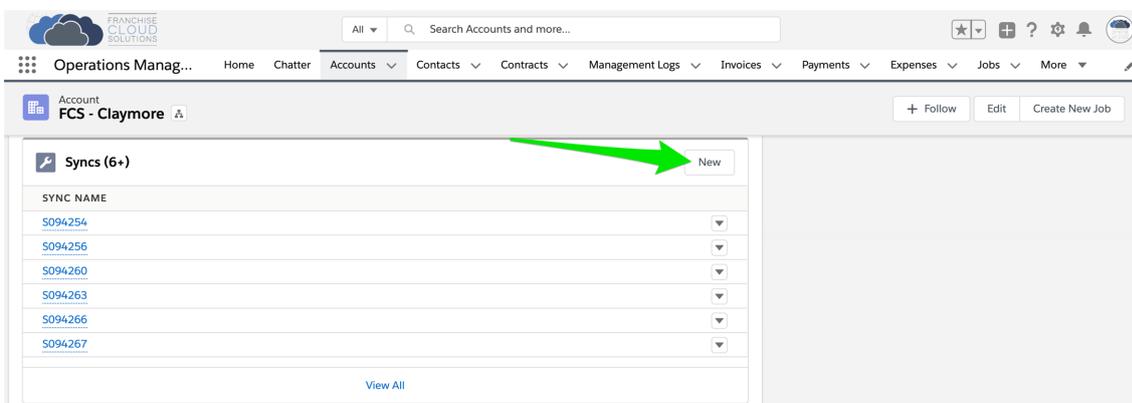
When you are syncing a new Franchise Profile Account or Master Franchise Profile Account with a Xero account that has extensive history, you will often need to prevent the system from attempting to sync the entire history.



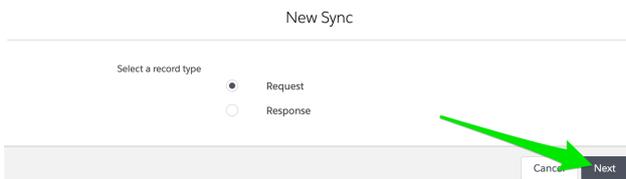
Attempts to sync a long-lived Xero account with a newly created Franchise Profile Account will usually result in syncing errors. You need to limit the sync to the period in which the Franchise Profile Account has records relating to the Xero account.

## To prevent historical syncing

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



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



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

#### New Sync: Request

**Information**

Sync Name	Franchise
	<input type="text" value="FCS - Claymore"/>
Request Sent Time	Invoice
Date <input type="text"/>	<input type="text" value="Search Invoices..."/>
Time <input type="text"/>	
Response Received Time	Sync Status
Date <input type="text"/>	<input type="text" value="Succeeded"/>
Time <input type="text"/>	
Error Message <input type="text"/>	Number Of Records <input type="text"/>
Parent Sync <input type="text" value="Search Syncs..."/>	From Date
Type <input type="text" value="--None--"/>	Date <input type="text"/>
	Time <input type="text"/>
	To Date
	Date <input type="text"/>
	Time <input type="text"/>

**System Information**

Currency	Owner
<input type="text" value="AUD - Australian Dollar"/>	Loryn Jenkins

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

### New Sync: Request

**Information**

Sync Name	Franchise
	<input type="text" value="FCS - Claymore"/>
Request Sent Time	Invoice
Date <input type="text"/>	<input type="text" value="Search Invoices..."/>
Time <input type="text"/>	
Response Received Time	Sync Status
Date <input type="text"/>	<input type="text" value="Succeeded"/>
Time <input type="text"/>	
Error Message	Number Of Records
<input type="text"/>	<input type="text"/>
Parent Sync	From Date
<input type="text" value="Search Syncs..."/>	Date <input type="text"/>
	Time <input type="text"/>
Type	To Date
<input type="text" value="Automatic"/>	Date <input type="text"/>
	Time <input type="text"/>

**System Information**

Currency	Owner
<input type="text" value="AUD - Australian Dollar"/>	Loryn Jenkins

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

New Sync: Request

**Information**

Sync Name	Franchise
	FCS - Claymore
Request Sent Time	Invoice
Date	Search Invoices...
Time	
Response Received Time	Sync Status
Date	Succeeded
Time	
Error Message	Number Of Records
Parent Sync	From Date
Search Syncs...	Date
	Time
Type	To Date
Automatic	Date
	Time
	19/08/2019
	12:00 PM

**System Information**

Currency	Owner
AUD - Australian Dollar	Loryn Jenkins

Cancel   Save & New   **Save**

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



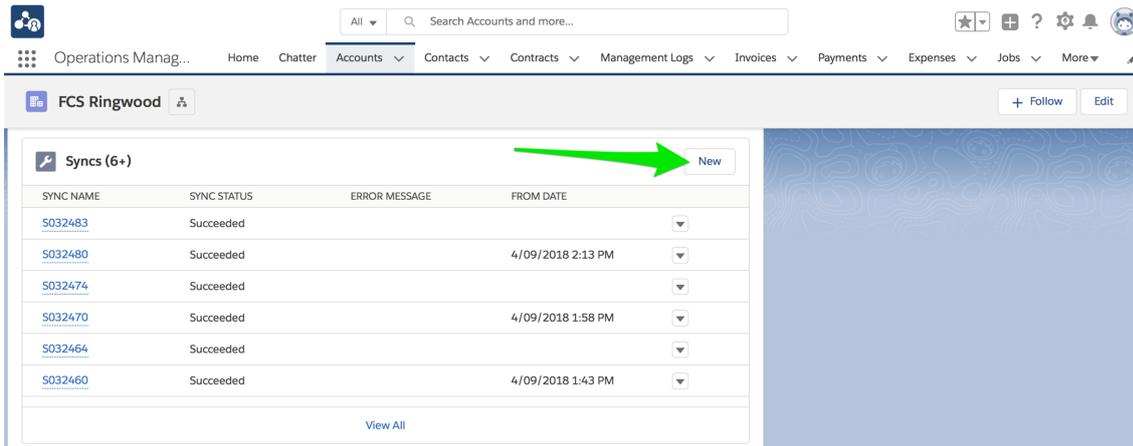
If you need to sync historical records from a defined range prior to the specified **To Date**, create a manual sync for the desired period (See “How to manually sync specific records” on the next page).

# How to manually sync specific records

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

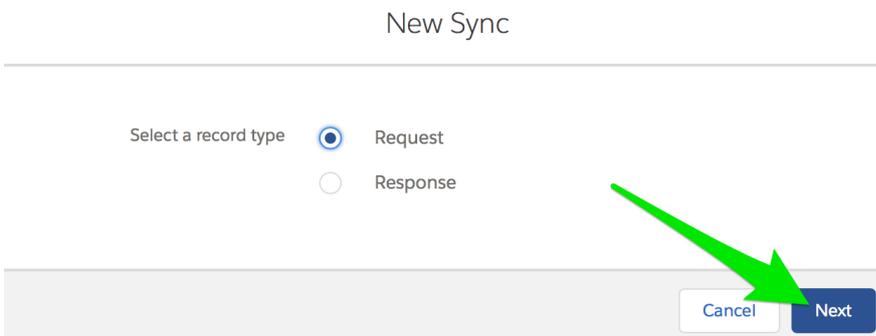
To sync specific date and time ranges for a particular account

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



The **New Sync** dialog box appears.

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



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

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

New Sync: Request

### Information

Sync Name	Franchise FCS Ringwood
Request Sent Time Date Time	Invoice INV-00001
Response Received Time Date Time	Sync Status In Progress
Error Message	Number Of Records
Parent Sync Search Syncs...	From Date Date Time
Type Manual	To Date Date Time

### System Information

Currency Australian Dollar	Owner Loryn Jenkins
-------------------------------	------------------------

Cancel Save & New **Save**

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

# How to ready franchisee account names for Xero sync

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



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

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

- » **Financial System Name Type**
- » **Trading Name and**
- » **Legal Entity Name fields.**

## How to use the Legal Entity Name field

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

## How to use the Trading Name field

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

## How to use the Financial System Name Type field

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



**Record Name** will set the `Financial System Name` field from the `FPA Account Name` field.

**Legal Name T/as Record Name** uses the `Legal Entity Name` followed by "T/as" then the `Account Name`.

**Legal Name T/as Trading Name** uses the `Legal Entity Name` followed by "T/as" then the `Trading Name`.

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



Any changes you might make to a **Franchise Profile Account** name in Xero will not be reflected back into Salesforce.

When you begin syncing to a Xero account, the sync process controls the Xero customer account name field. This means that any changes you want made to a Xero account name must be done from Salesforce.



# CHAPTER 12

## Working with Audits

Understanding audits .....	142
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# Understanding audits

Audits are a useful management tool to ensure repeatable processes and quality outcomes are achieved.

Audits are typically used to

- » Collect evidence at defined stages in a job
- » Document business improvement initiatives

Audits allow you to ask a standard set of questions and a range of type of answers

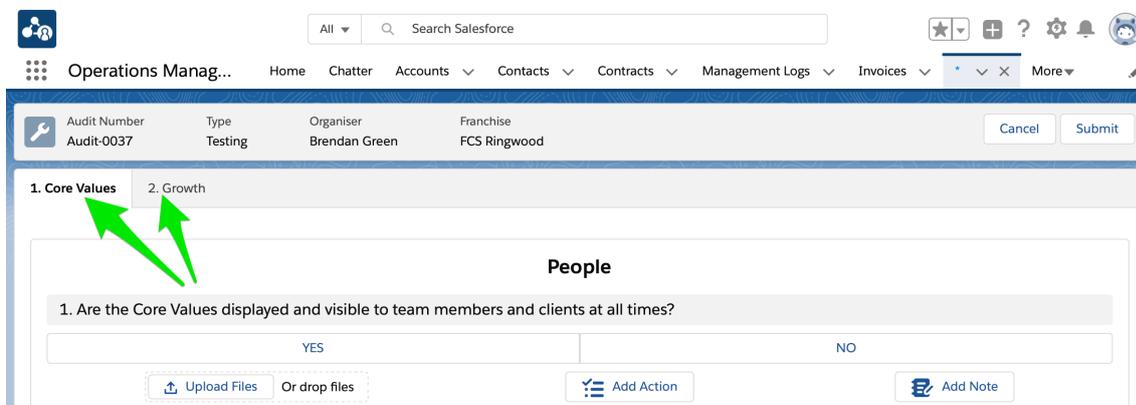
- » Binary answers: Yes or No | Pass or Fail | True or False
- » Scaled answers (0-n)
- » Worded responses selected from a defined set
- » Not applicable (N/A)

Evidence for your answers can be attached, including field notes and images or photographs taken directly from your phone's camera. Follow-up actions can be set directly from the audit. When the audit is complete, the system can optionally calculate a score.

## How audits appear to end users

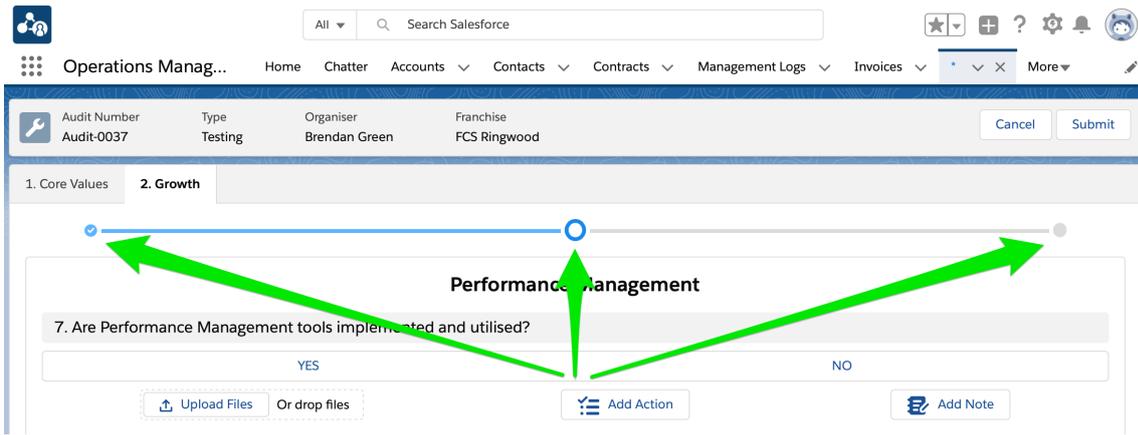
When a user is completing an audit, there are a series of questions that are asked in a regular order.

- » Questions can be grouped by tabs.

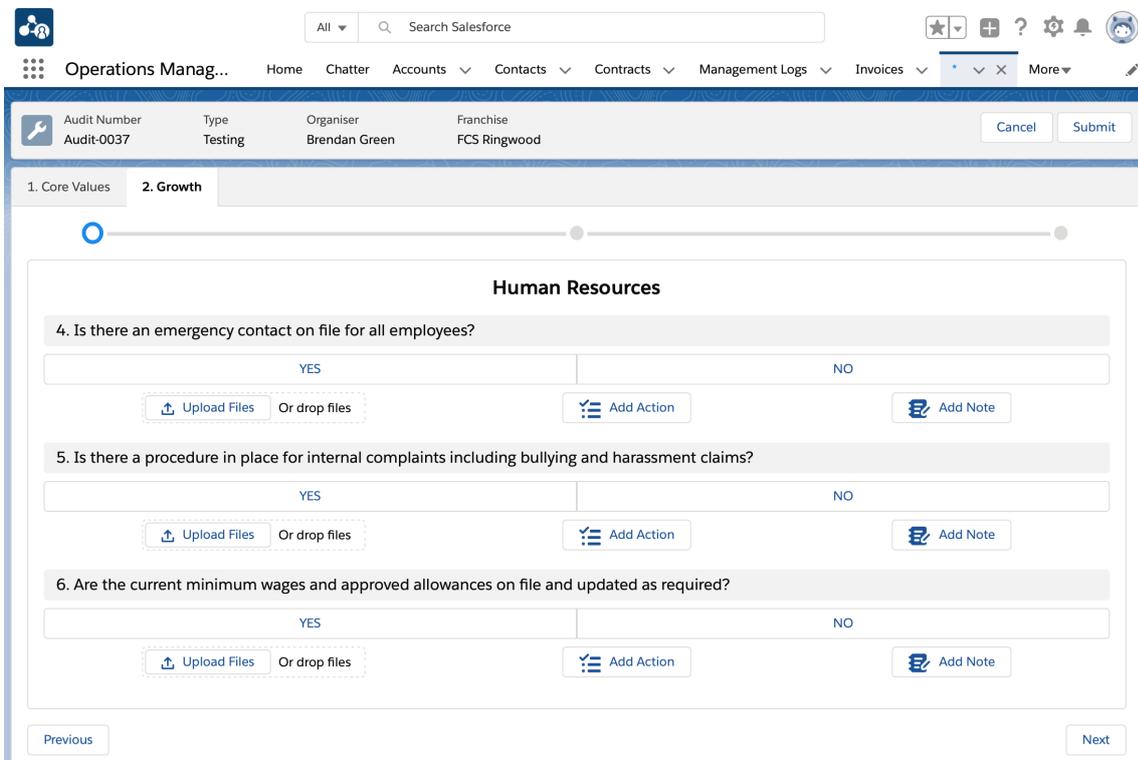


The screenshot shows the Salesforce interface for an audit. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a breadcrumb trail: "Operations Manag... Home Chatter Accounts > Contacts > Contracts > Management Logs > Invoices > > X More >". The main content area is titled "Audit-0037" and includes fields for "Type: Testing", "Organiser: Brendan Green", and "Franchise: FCS Ringwood". There are "Cancel" and "Submit" buttons. The audit is divided into two tabs: "1. Core Values" and "2. Growth". Two green arrows point to these tabs. The "1. Core Values" tab is active and shows a question: "1. Are the Core Values displayed and visible to team members and clients at all times?". Below the question are two radio buttons labeled "YES" and "NO". At the bottom of the form, there are three buttons: "Upload Files" (with a file icon), "Or drop files", and "Add Action" (with a list icon). To the right of "Add Action" is an "Add Note" button (with a notepad icon).

» Each tab can show multiple pages of questions. Progress is shown on a progress bar.



» One or more questions can display on each page.



» The user can provide evidence for answers by recording notes or uploading files, images and photographs.

Operations Manag... Home Chatter Accounts Contacts Contracts Management Logs Invoices More

Audit Number: Audit-0037, Type: Testing, Organiser: Brendan Green, Franchise: FCS Ringwood

### Human Resources

4. Is there an emergency contact on file for all employees?

YES NO

Upload Files Or drop files Add Action Add Note

5. Is there a procedure in place for internal complaints including bullying and harassment claims?

YES NO

Upload Files Or drop files Add Action Add Note

6. Are the current minimum wages and approved allowances on file and updated as required?

YES NO

Upload Files Or drop files Add Action Add Note

Previous Next

» Actions arising from the observation can be created.

Operations Manag... Home Chatter Accounts Contacts Contracts Management Logs Invoices More

Audit Number: Audit-0037, Type: Testing, Organiser: Brendan Green, Franchise: FCS Ringwood

### Human Resources

4. Is there an emergency contact on file for all employees?

YES NO

Upload Files Or drop files Add Action Add Note

5. Is there a procedure in place for internal complaints including bullying and harassment claims?

YES NO

Upload Files Or drop files Add Action Add Note

6. Are the current minimum wages and approved allowances on file and updated as required?

YES NO

Upload Files Or drop files Add Action Add Note

Previous Next

» When complete, the user submits the audit.

The screenshot displays a Salesforce interface for an audit submission. At the top, there is a navigation bar with the 'Operations Manag...' title and various menu items like Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, and More. A search bar for 'Search Salesforce' is also present. Below the navigation bar, the audit details are shown: Audit Number (Audit-0037), Type (Testing), Organiser (Brendan Green), and Franchise (FCS Ringwood). A progress bar indicates the current step is '2. Growth'. The main content area is titled 'Technology' and contains two questions. Question 10 asks about technology solutions and their strengths/weaknesses, with 'YES' selected. Question 11 asks if all technology systems are integrated and working as an end-to-end system, with 'NO' selected. Each question has buttons for 'Upload Files', 'Or drop files', 'Add Action', and 'Add Note'. At the bottom left, there is a 'Previous' button. At the top right, there are 'Cancel' and 'Submit' buttons, with a green arrow pointing to the 'Submit' button.

# How to work with the audit resource file

Questions for all audits are prepared in a single static resource and then imported into Salesforce. The following table explains how to work with the contents of the `Audit_Resource.csv` file.



If you use a spreadsheet to edit the `Audit_Resource.csv` file, remember to export the changes back into CSV format before import into Salesforce.

## Data in the audit resource file

Column Name	Description	Example
Type	Determines which audit type the current question belongs to. To use a new audit type, speak with your system administrator.	General
Display_Order__c	Numeric value describing the display order of each question within a section.	1
Description__c	The question displayed to the user. Can be formatted as plain text or using HTML.	All employees possess current health and safety certificates?
Guidance_Notes__c	Description of the evaluation. Can be formatted as plain text or using HTML.	<p>&lt;p&gt;&lt;b&gt;Check:&lt;/b&gt;&lt;/p&gt; &lt;ul&gt; &lt;li&gt;Current health and safety cert is filed for each employee.&lt;/li&gt; &lt;/ul&gt;</p>
Possible_Findings__c	A pipe-delimited string describing the set of possible answers. Each sub-string is displayed on its own button. See below for the syntax for this column.	N/A   No   Yes
Pass_Finding__c	Optional criteria to determine whether this finding is a pass or fail. Questions pass by default.	8
Category__c	Determines the name of the tab on which the question is displayed. All questions belonging to a category are displayed on the same tab. Tabs appear in alphabetical order.	People

Column Name	Description	Example
Section__c	Determines the name of the section for each question. All questions belonging to a section are displayed on the same page. Sections are presented in alphabetical order.	Health & Safety
Maximum_Score__c	Optional column used for scoring. Specifies the maximum score that can be attributed to this question. Must be a positive number.	10
Scoring_Direction__c	Optional column used for scoring. Determines whether the question starts from a zero-value and adds scores based on your answers, or whether it starts from the Maximum_Score and subtracts scores based on the answer.	DOWN
Weighting__c	Numeric value against which the finding score is multiplied.	5
Show_Notes__c	Determines whether notes are displayed by default.	TRUE



To control the order of the tabs, begin the Category name with a number.



Content within the Category\_\_c and Section\_\_c columns cannot contain commas. If you need to include a separator, use a dash instead of a comma.



If you add a new Type to the spreadsheet, you will need to configure a new audit type (See “How to configure a new audit type” on page 157) before updating the audit resource file into Salesforce.

## Syntax for Possible Findings column

Acceptable syntax for the Possible Findings column is as follows.

Syntax	Example	Description
Binary responses	{ N/A   } Fail   Pass { NA   } False   True { NA   } No   Yes	System recognizes three types of Binary Response, each of which can support an optional Not Applicable (N/A or NA is equally acceptable).

Syntax	Example	Description
Scaled responses	Slider:% Slider:1	Sliders provides a way to select a scaled, numeric response. The slider will produce a slider control whose increments are defined by the value after the colon and whose range is defined by the Maximum_Score.  With the first slider, the slider range is from 0 to 1.0 incrementing by 0.01. The slider value is multiplied by Maximum_Score to obtain the slider's score.  In second example, when Maximum_Score is 10, then the slider will contain ten increments (0, 1, 2 ... 9, 10), the increment being defined by the number following the colon.
Numeric responses	{NA} 1 2 3 4 5 6 7 8 9 10 {N/A} 5 4 3 2 1	With numeric scales, the labels represent values.  In all cases, Maximum_Score must be given as the value of the greatest number.
Custom responses	{N/A} Low=1 Below Average=2 Average=3 Above Average=4 Excellent=5	Arbitrary named responses generate a button set with each response described on the button label.  When scoring is used, the number on the right-hand-side represents the score.



In all examples, an NA response removes the question from score calculation.

## Score calculations

Here are some examples as to how the score calculations work on individual questions.

Possible Findings	Maximum Score	Score Direction	Description	Comments
N/A   False   True	10	UP	True will score 10 False will score 0 N/A excludes question from scoring	Score Direction has no effect on binary responses.
N/A 1 2 3 4 5	5	UP	1 will score 1 2 will score 2 3 will score 3 4 will score 4 5 will score 5 N/A excludes question from scoring	Score will always be the value of the label. Maximum Score will generally be set to being equal to the greatest label value.
N/A Low-w=1 Average=3 Excellent=5	5	UP	Low will score 1 Average will score 3 Excellent will score 5 N/A excludes question from scoring	Score will always be the value of the label. Maximum Score will generally be set to being equal to the greatest label value.

Possible Findings	Maximum Score	Score Direction	Description	Comments
Slider:%	100	UP	The score will be the selected value.	Slider increments by 0.01, which is multiplied by the Maximum_Score to obtain the score value.
Slider:2	10	UP	Slider positions 0, 2, 4, 6, 8, 10 will be generated. The score will consist of the selected value.	Slider value (the number following the colon) sets the increment. Maximum_Score sets the range.
Text			Finding will consist of an open text field.	Text findings are not scored.



When all calculations are finished, system reports on the score relative to the maximum possible score. Not applicable questions are not included in the maximum possible score.

# How data in each audit resource column is displayed

The next two images show how the example above maps to the screen.

New Audit: General

Information

Audit Name

Status  
New

Management Log  
Search Management Logs...

Audit Start Date  
Date Time

Type  
--None--  
--None--  
General

Audit Closed Date  
Date Time

Job  
JN-00102

System Information

Currency  
AUD - Australian Dollar

Owner  
Loryn Jenkins

Cancel Save & New Save

Operations Manag... Home Chatter Accounts Jobs Job Offers Job Schedule Invoices More

Audit Number: Audit-0018, Type: General, Organiser, Franchise

People

Health & Safety

4. All employees possess current health and safety certificates?

Yes	No	N/A

Upload Files Or drop files Add Action

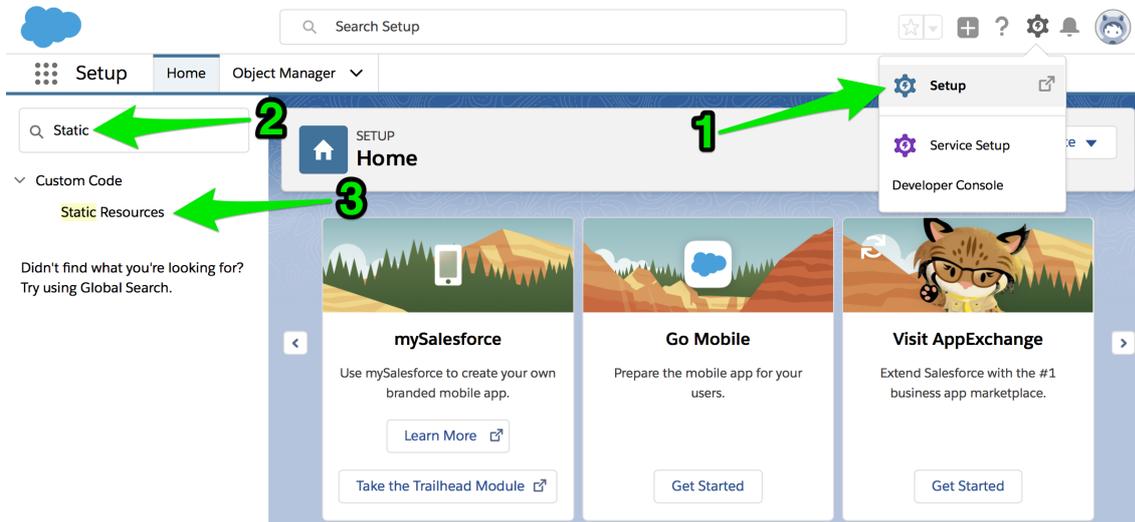
Previous Next

# How to add or change audit instruments

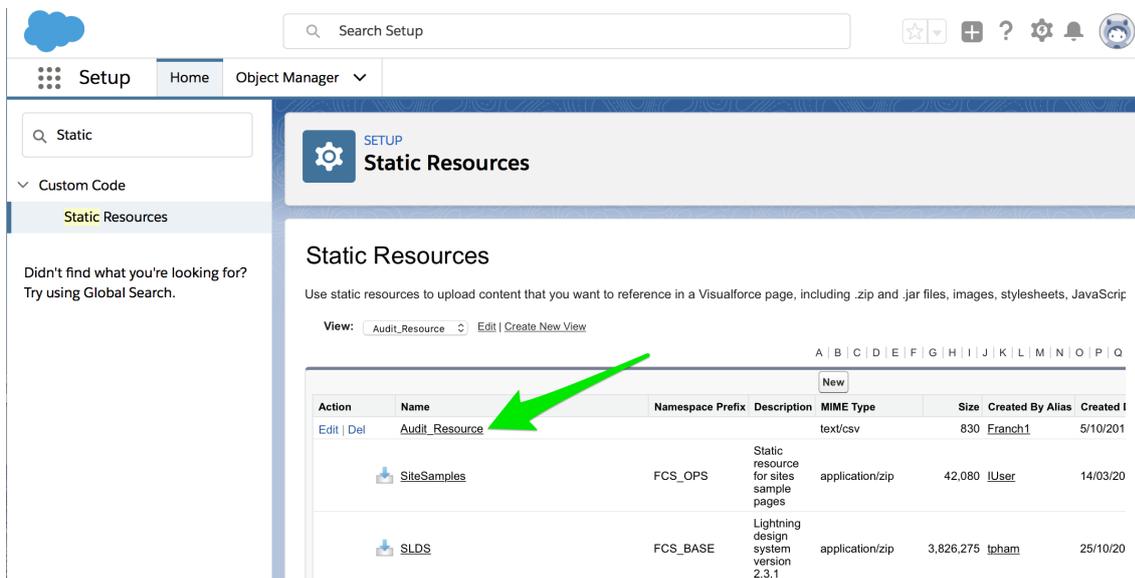
Questions for all audits are prepared in a single static resource and then imported into Salesforce.

To obtain the current audit resource file

1. From **Setup**, search for *Static Resources*.



2. Click on the current `Audit_Resource`.



3. Click on the [View file](#) link.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The left sidebar contains a search bar with 'Static' entered, and a list of items including 'Custom Code' and 'Static Resources'. The main content area is titled 'Static Resources' and displays details for a specific resource named 'Audit\_Resource'. The details include Name, Namespace Prefix, Description, MIME Type (text/csv), Cache Control (Private), Size (830 bytes), and a 'View file' link. A green arrow points to the 'View file' link. Below the details are fields for 'Created By' (Shikher Chowdhary, 5/10/2018 10:57 AM) and 'Last Modified By' (Loryn Jenkins, 18/10/2018 3:18 PM). At the bottom of the details section are 'Edit', 'Delete', and 'Where is this used?' buttons.

4. The `Audit_Resource.csv` file will download to your computer. To make any changes, you will need to edit this file.



If the file happens to download as `Audit_Resource`, `Audit_Resource.xls` or `Audit_Resource.xlsx`, make sure you change the file name to `Audit_Resource.csv` before you open it.

### To edit the audit resource file

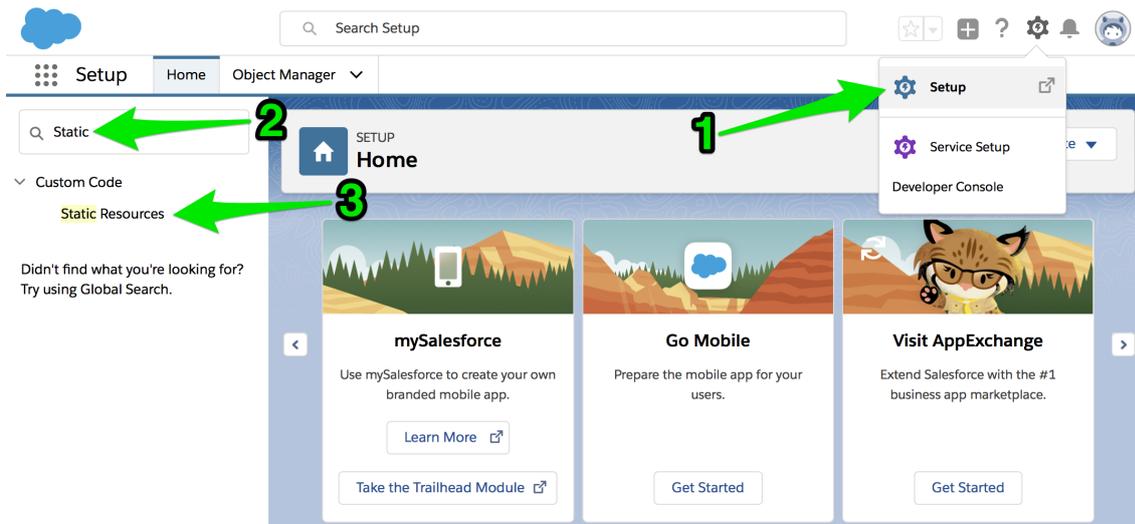
» See “How to work with the audit resource file” on page 146.



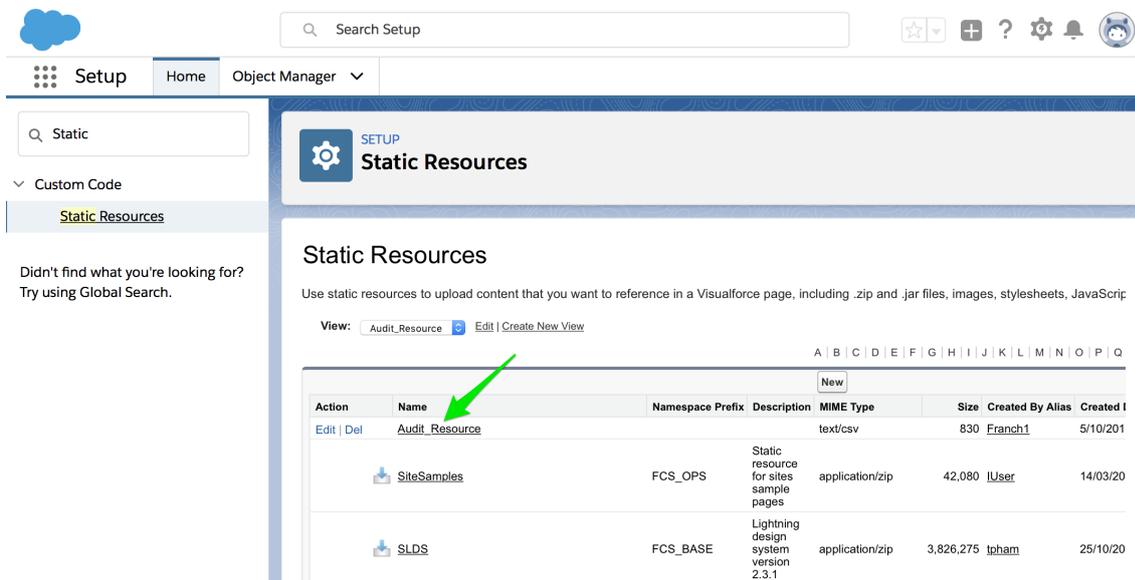
If you add a new Type to the spreadsheet, you will need to configure a new audit type (See “How to configure a new audit type” on page 157) before updating the audit resource file into Salesforce.

## To update the audit resource file

1. From Setup, search for *Static Resources*.



2. Click on the `Audit_Resource` link.



3. Ensure Cache Control is set to *Private*.

Static Resource Detail

Name	Audit_Resource
Namespace Prefix	
Description	
MIME Type	application/vnd.ms-excel
Cache Control	Private
Size	93,540 bytes
View file	
Created By	ECS_Support 12/06/2019 3:30 PM
Last Modified By	ECS_Support 11/07/2019 11:07 AM

4. Now click on the **Edit** link for the `Audit_Resource`.

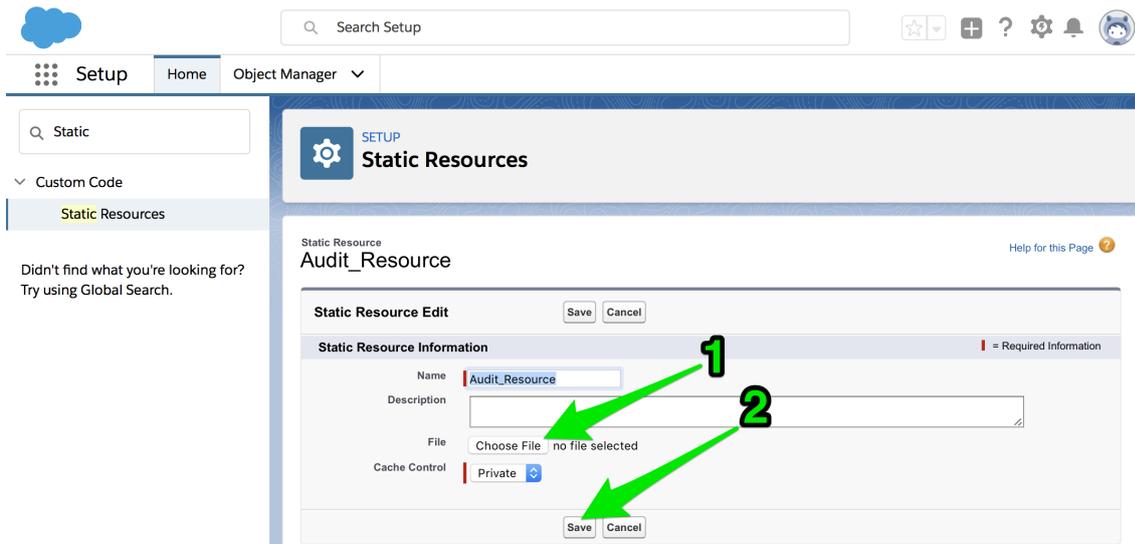
Static Resources

Use static resources to upload content that you want to reference in a Visualforce page, including .zip and .jar files, images, stylesheets, JavaScript

View: Audit\_Resource Edit Create New View

Action	Name	Namespace Prefix	Description	MIME Type	Size	Created By Alias	Created I
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Audit_Resource</a>			text/csv	830	<a href="#">Franch1</a>	5/10/201
	<a href="#">SiteSamples</a>	FCS_OPS	Static resource for sites sample pages	application/zip	42,080	<a href="#">User</a>	14/03/20
	<a href="#">SLDS</a>	FCS_BASE	Lightning design system version 2.3.1	application/zip	3,826,275	<a href="#">lpham</a>	25/10/20

5. Select the **Choose File** button. Select the modified CSV file from your computer. Then choose **Save**.



The `Audit_Resource.csv` file will upload to Salesforce.

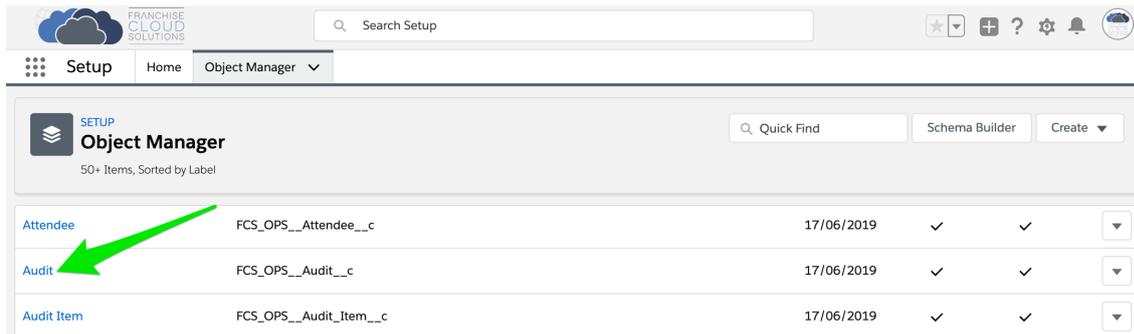
You should then see the changes you have made to the `Audit_Resource.csv` file reflected in the available audit types, questions, answers, tabs and sections.

# How to configure a new audit type

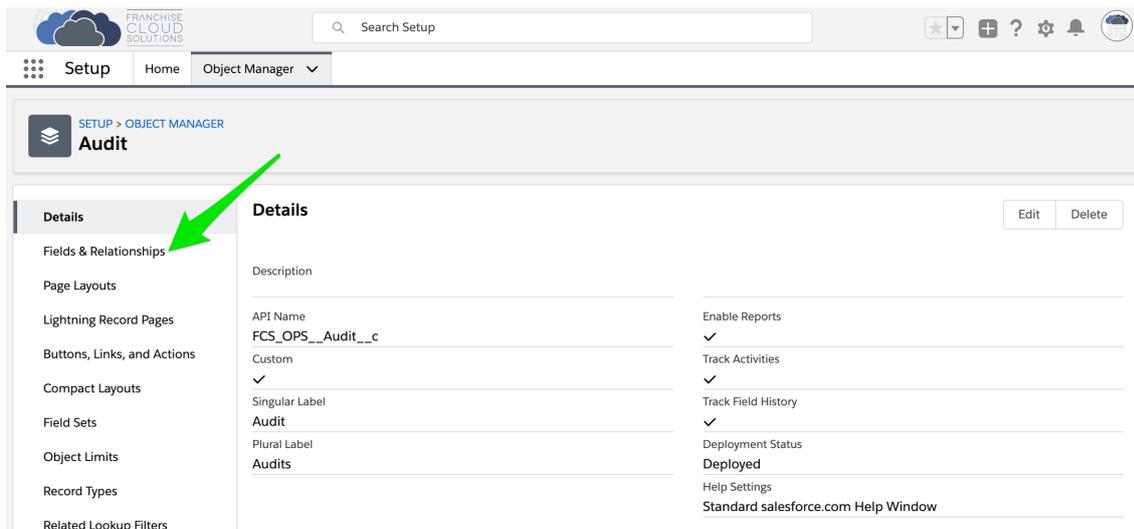
When you import an audit plan into Salesforce, new and changed questions for existing audit types will automatically be available the next time you create a new audit. However, importing an audit plan is not sufficient for new audit types to appear in the Audit dialog's Type field. To make new audit types appear, you need to add a new audit type.

## To add a new audit type

1. Go to **Setup**, and search for *Object Manager*.
2. From **Object Manager**, select the *Audit* record.



3. Select **Fields & Relationships**.



4. Now choose the Field Label named *Type*.

The screenshot shows the Salesforce Setup interface for the 'Audit' object. The 'Fields & Relationships' section is active, displaying a table of 11 fields. A green arrow points to the 'Type' field label in the table.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Audit Closed Date	FCS_OPS__Audit_Closed_Date__c	Date/Time		
Audit Name	Name	Auto Number		✓
Audit Start Date	FCS_OPS__Audit_Start_Date__c	Date/Time		
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Management Log	FCS_OPS__Management_Log__c	Lookup(Management Log)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Record Type	RecordTypeId	Record Type		✓
Status	FCS_OPS__Status__c	Picklist		
Type	FCS_OPS__Type__c	Picklist		

5. In the **Values** pane, add a new type by pressing the **New** button.

The screenshot shows the Salesforce Setup interface for configuring an Audit object. The left sidebar contains navigation options like Details, Fields & Relationships, Page Layouts, etc. The main content area is divided into several sections: Field Information, Package Information, General Options, Picklist Options, Field Dependencies, Validation Rules, Values, and Inactive Values. The 'Values' section is highlighted with a green border and contains a table of active values.

Action	Values	API Name	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	General	General	<input type="checkbox"/>	Assigned dynamically	<a href="#">Integration User</a> , 12/06/2018 7:57 PM
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Growth Visit	Growth Visit	<input type="checkbox"/>	Assigned dynamically	<a href="#">Integration User</a> , 3/07/2018 11:28 AM
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Annual	Annual	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kerryn Miller</a> , 15/11/2018 12:33 PM
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Drug & Alcohol Compliance	Drug & Alcohol Compliance	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kerryn Miller</a> , 24/09/2019 3:23 PM

6. Press **New** to add one or more values. Enter each value onto a new line. Ensure you check each and every Record Type on which you want this Type to appear. Press **Save**.

FRANCHISE CLOUD SOLUTIONS

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Audit

Details

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- Search Layouts for Salesforce Classic
- Triggers
- Validation Rules

Add Picklist Values

#### Type

Help for this Page

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

Work Health and Safety

To add the new value to the picklist values for a particular Record Type, check the appropriate box below.

Type Name	Description
<input checked="" type="checkbox"/>	General

Save Cancel

The new value is added to the list of types available from the General record.



Now importing a spreadsheet containing questions having this Type value will cause the Type to appear within the **Audit** object's `Type` field.

# How to work with attachments that are not images

Attachments that are images can be viewed by clicking the images link. Clicking the image link allows you to view the image. You have the option to delete the image should you choose to do so.

The screenshot shows a Salesforce interface for an audit. At the top, there's a navigation bar with 'Operations Manag...' and a search bar. Below that, a header section contains 'Audit Number: Audit-0029', 'Type: Testing', 'Organiser: Brendan Green', and 'Franchise: FCS Ringwood'. The main content area is titled 'Human Resources' and contains three questions:

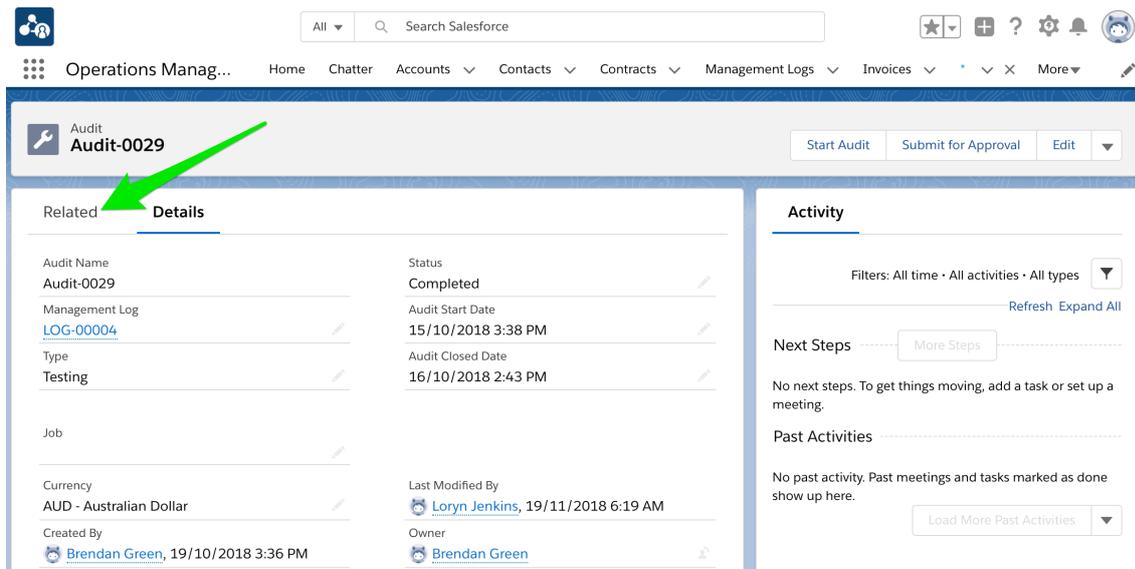
- 4. Is there an emergency contact on file for all employees?  
YES (selected) | NO  
Upload Files | Or drop files | 2 images (highlighted with a green arrow) | Add Action | Add Note
- 5. Is there a procedure in place for internal complaints including bullying and harassment claims?  
YES (selected) | NO  
Upload Files | Or drop files | Add Action | Add Note
- 6. Are the current minimum wages and approved allowances on file and updated as required?  
YES (selected) | NO  
Upload Files | Or drop files | Add Action | Add Note

At the bottom, there are 'Previous' and 'Next' navigation buttons.

Attachments that are not images are managed via attachments to the audit questions.

## To locate non-image attachments

### 1. From the Audit record, selected Related.

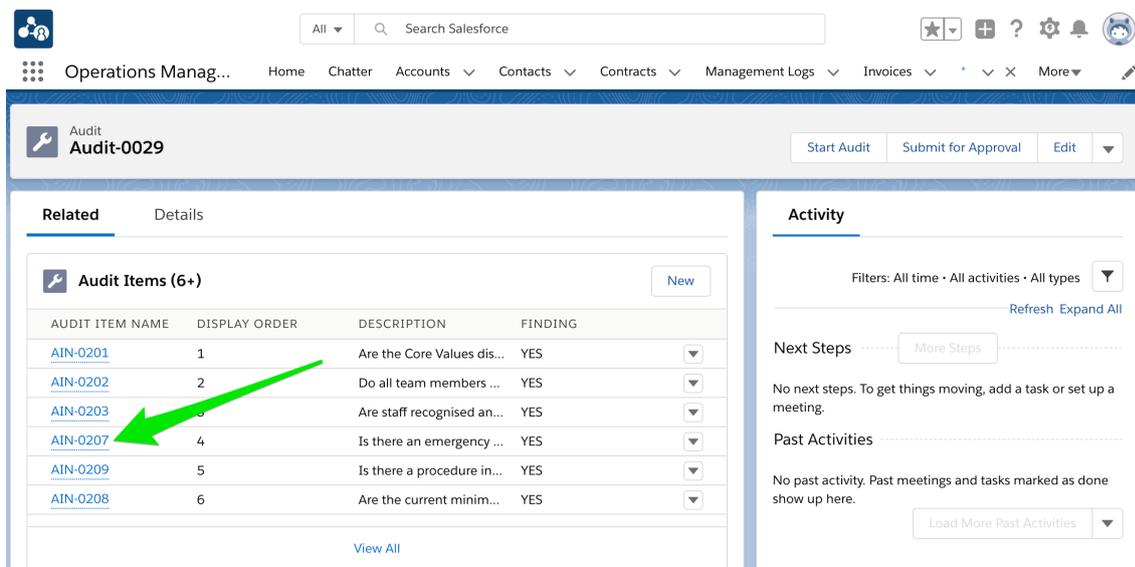


The screenshot shows the Salesforce interface for an Audit record named 'Audit-0029'. The 'Related' tab is selected, and a green arrow points to it. The 'Details' section shows the following information:

Audit Name	Audit-0029	Status	Completed
Management Log	<a href="#">LOG-00004</a>	Audit Start Date	15/10/2018 3:38 PM
Type	Testing	Audit Closed Date	16/10/2018 2:43 PM
Job			
Currency	AUD - Australian Dollar	Last Modified By	Loryn Jenkins, 19/11/2018 6:19 AM
Created By	Brendan Green, 19/10/2018 3:36 PM	Owner	Brendan Green

The 'Activity' section shows filters for 'All time', 'All activities', and 'All types'. It indicates 'No next steps' and 'No past activity'.

### 2. Select an Audit Item.

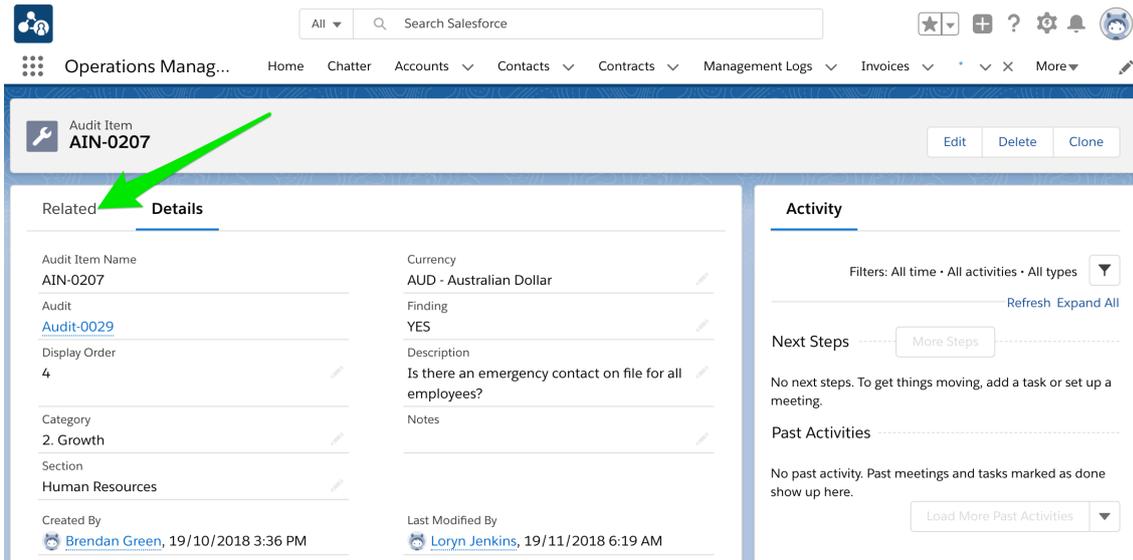


The screenshot shows the Salesforce interface for an Audit record named 'Audit-0029'. The 'Related' tab is selected, and a green arrow points to the 'AIN-0207' audit item in the table. The 'Audit Items (6+)' table is displayed with the following data:

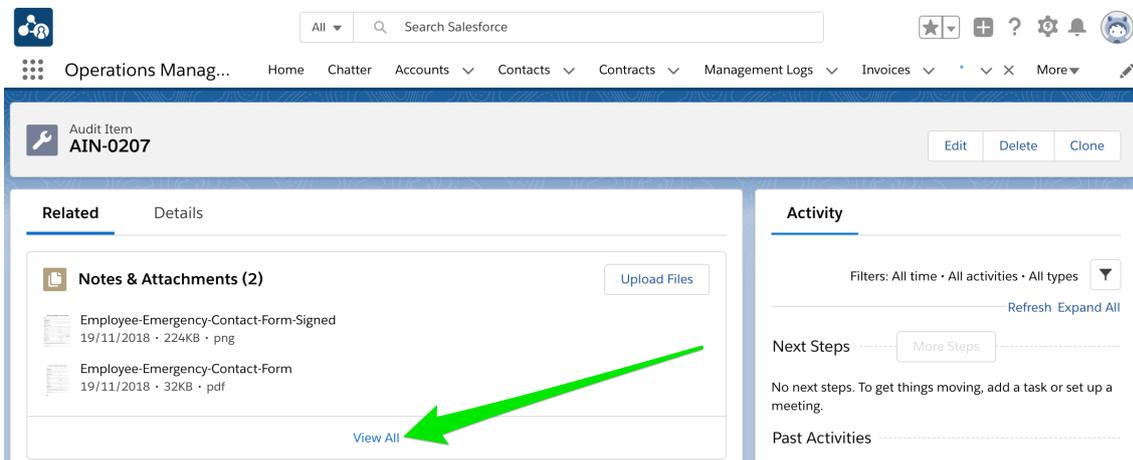
AUDIT ITEM NAME	DISPLAY ORDER	DESCRIPTION	FINDING
<a href="#">AIN-0201</a>	1	Are the Core Values dis...	YES
<a href="#">AIN-0202</a>	2	Do all team members ...	YES
<a href="#">AIN-0203</a>	3	Are staff recognised an...	YES
<a href="#">AIN-0207</a>	4	Is there an emergency ...	YES
<a href="#">AIN-0209</a>	5	Is there a procedure in...	YES
<a href="#">AIN-0208</a>	6	Are the current minim...	YES

The 'Activity' section shows filters for 'All time', 'All activities', and 'All types'. It indicates 'No next steps' and 'No past activity'.

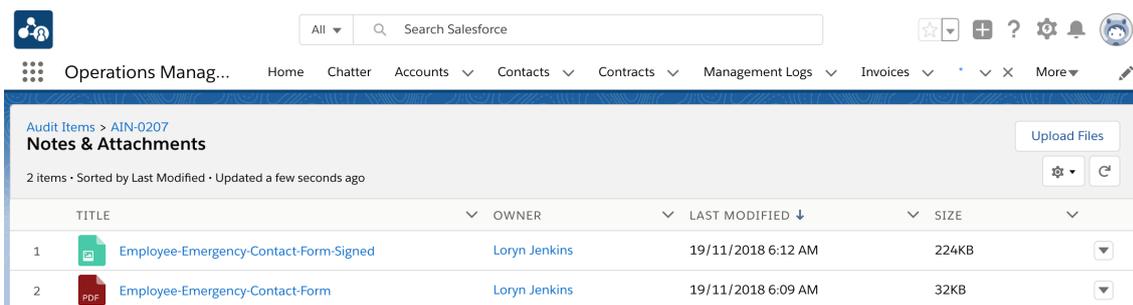
3. Now select the Audit Item's Related tab.



4. In the Notes & Attachments section select the View All link.

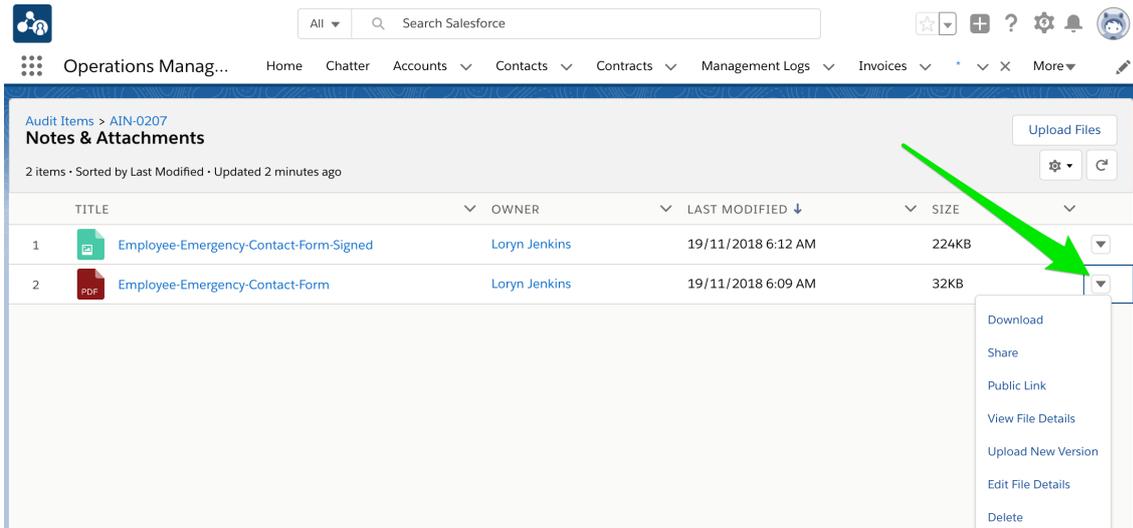


5. You can now view all the files attached to the question.



## To edit any of the attachments

1. Select from the attachment's **Edit** menu.



The screenshot shows the Salesforce interface for 'Notes & Attachments' under 'Audit Items > AIN-0207'. The table lists two attachments:

TITLE	OWNER	LAST MODIFIED	SIZE
1  Employee-Emergency-Contact-Form-Signed	Loryn Jenkins	19/11/2018 6:12 AM	224KB
2  Employee-Emergency-Contact-Form	Loryn Jenkins	19/11/2018 6:09 AM	32KB

A green arrow points to the dropdown menu of the second attachment, which is open and shows the following options: Download, Share, Public Link, View File Details, Upload New Version, Edit File Details, and Delete.

# CHAPTER 13

## Working with Email

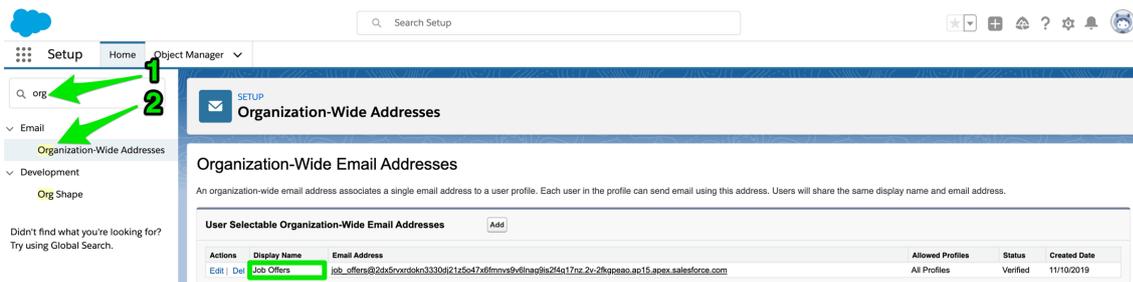
How to configure an organization wide email address .....	166
How to set up an email signature block .....	168
How to edit email template headers and footers .....	172
How to create a custom email template .....	175
How to create a Quote email template .....	186
How to create an Invoice email template .....	187
How to configure Classic Email Templates .....	188
How to convert a Classic Email Template to Lightning .....	190

# How to configure an organization wide email address

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

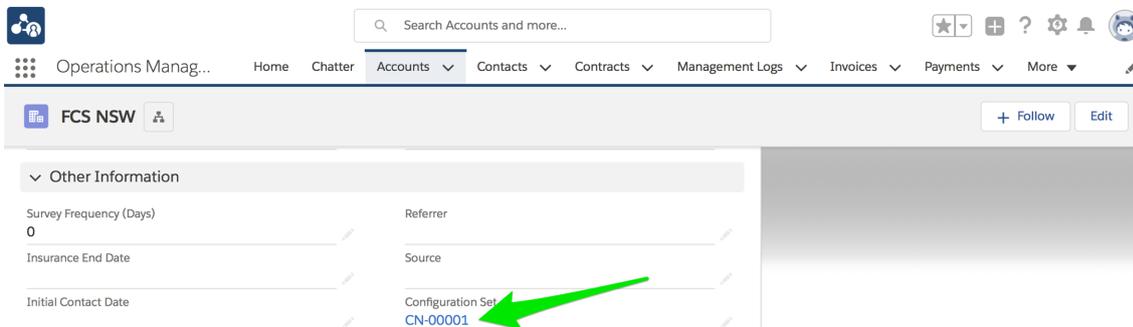
## To configure the Org Wide Email Address

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



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

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



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

Job Allocation Settings	
Geo-coding Minimum Level Rooftop;Range_Interpolated;Geometric_Center;Approximate	Enabled Messaging Direction Both
Job Type Eligibility Off	Retention Period Of Job Potential 90
<b>Org Wide Email Address Name Job Offers</b>	Accepted Or Declined Job Offer Template Accepted_Or_Declined_Job_Offer_Template
Eligibility Criteria Logic	Expired Or Timeout Job Offer Template Expired_Or_Timeout_Job_Offer_Template
Distance Calculation Straight Line	Timeout Per Offer 1
Distance Units Kilometres	Timeout Per Job 2
Job Offer Processing Sequential	No Timeout In Owned Area <input checked="" type="checkbox"/>
Job Allocation Queue Name Default Job Queue	One Offer At A Time <input checked="" type="checkbox"/>
Job Offer Email Template Default_Job_Offer_Template	Offer Owned Area 24/7 <input checked="" type="checkbox"/>
Force Allocation Email Template Force_Allocate_Email_Template	Offer Inside Contact Hours Only <input checked="" type="checkbox"/>
	Queue In Territory Offers <input checked="" type="checkbox"/>
Duplicate Job Timeframe	
Duplicate Job Criteria	
Customer Matching Criteria (FirstName = [FCS_OPS_BETA__First_Name__c] && LastName = [FCS_OPS_BETA__Last_Name__c])	

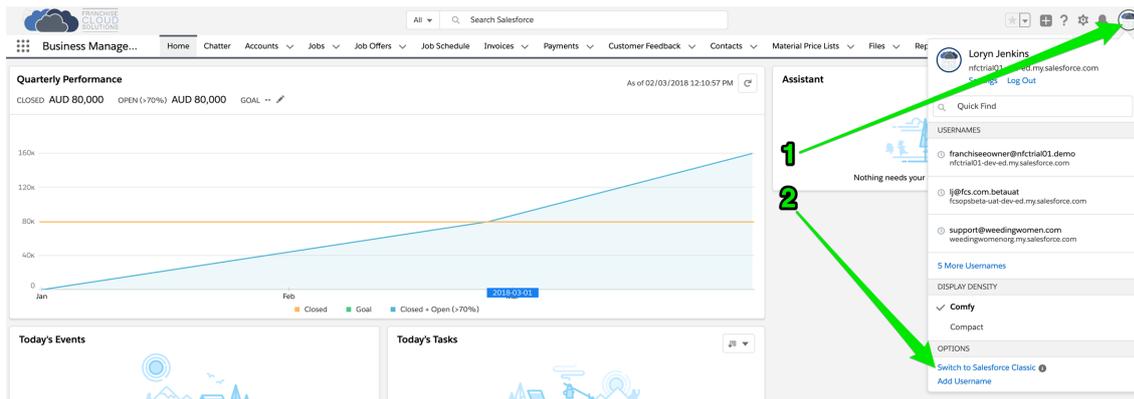
# How to set up an email signature block

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

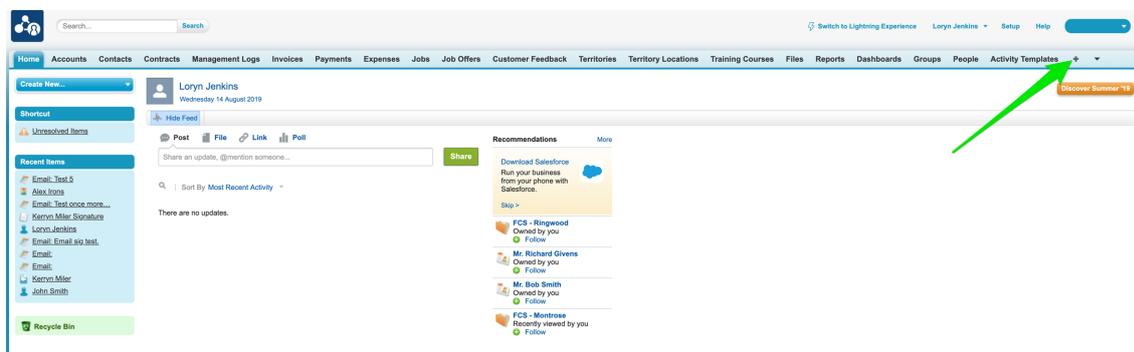
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.

## To obtain a signature block URL

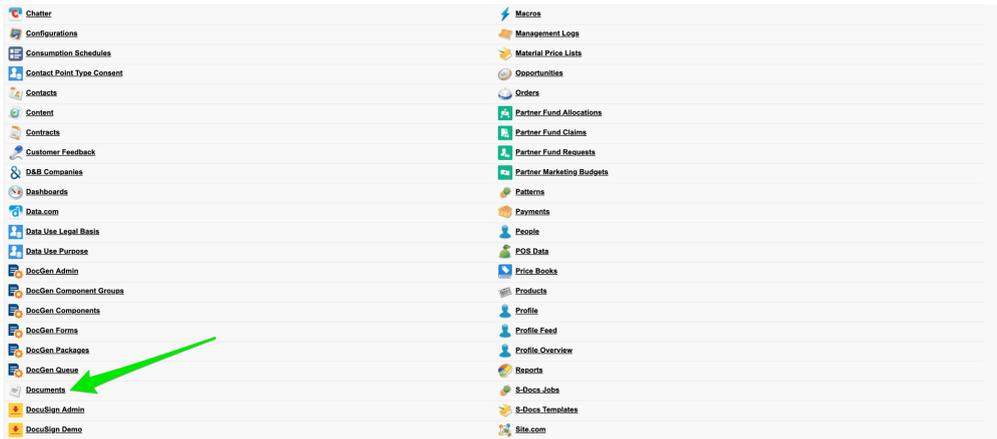
1. Obtain a signature block image for a user.
2. Within Salesforce, switch into Classic.



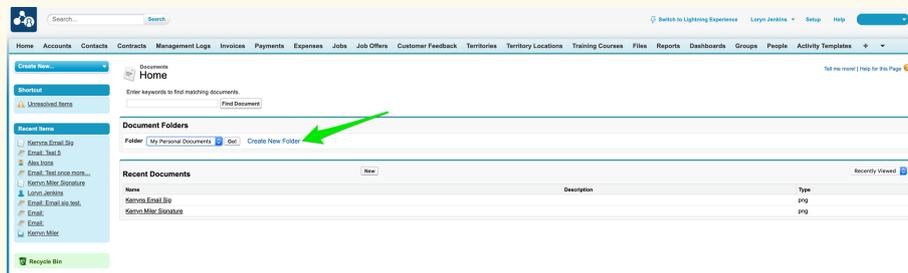
3. Find the documents tab, either in the menu or by pressing the + icon.



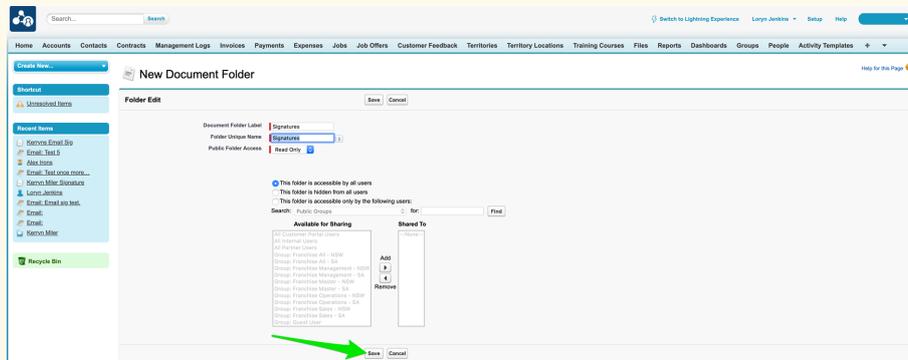
#### 4. Now scroll down and select Documents.



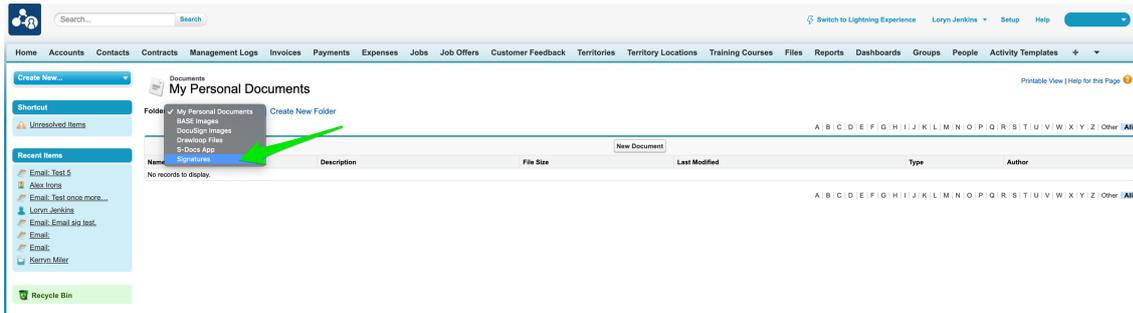
If this is the first signature you have uploaded, create a new folder for all email signatures called *Signatures*.



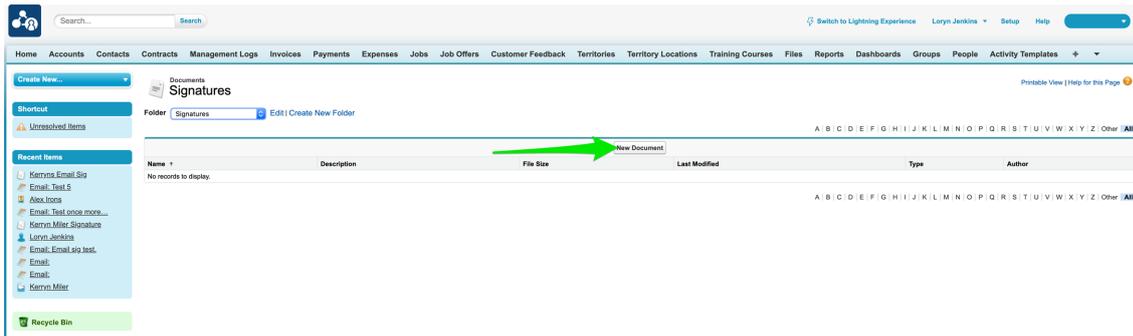
Complete the *Signatures* folder details, then press Save.



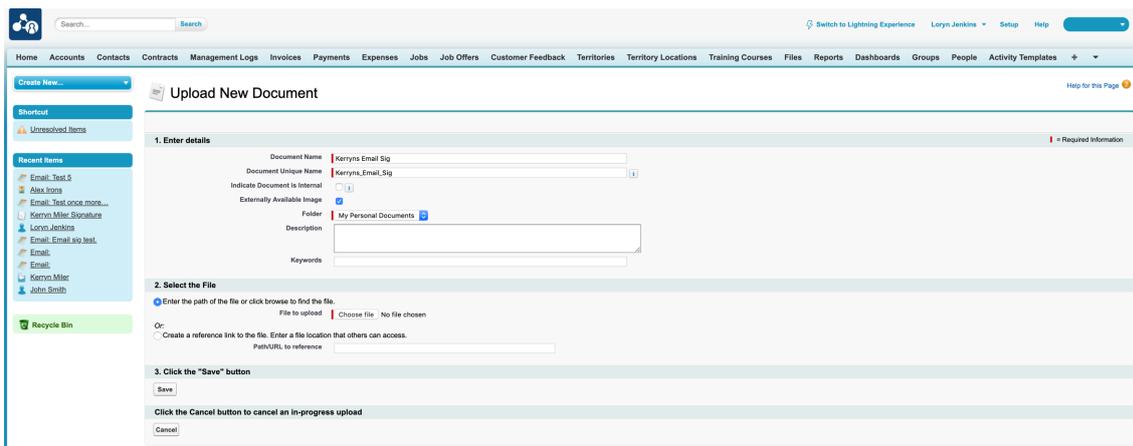
5. Switch to the *Signatures* folder.



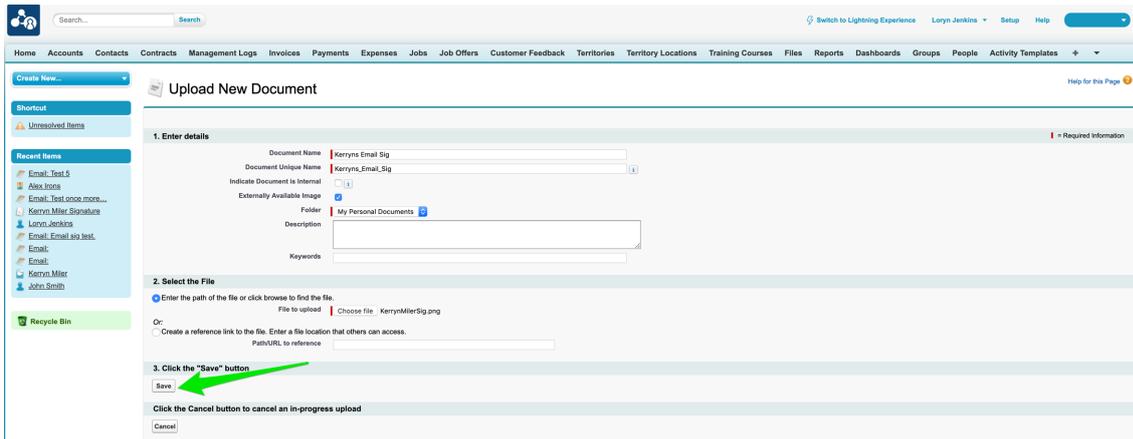
6. From the *Signatures* folder, press New Document.



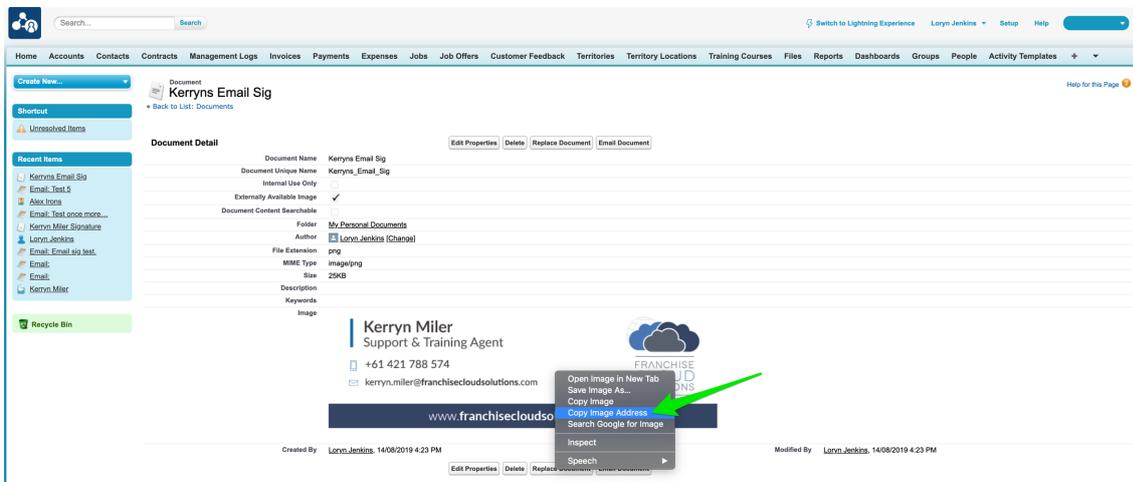
7. Complete the details. Make sure you check Externally Available Image.



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



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



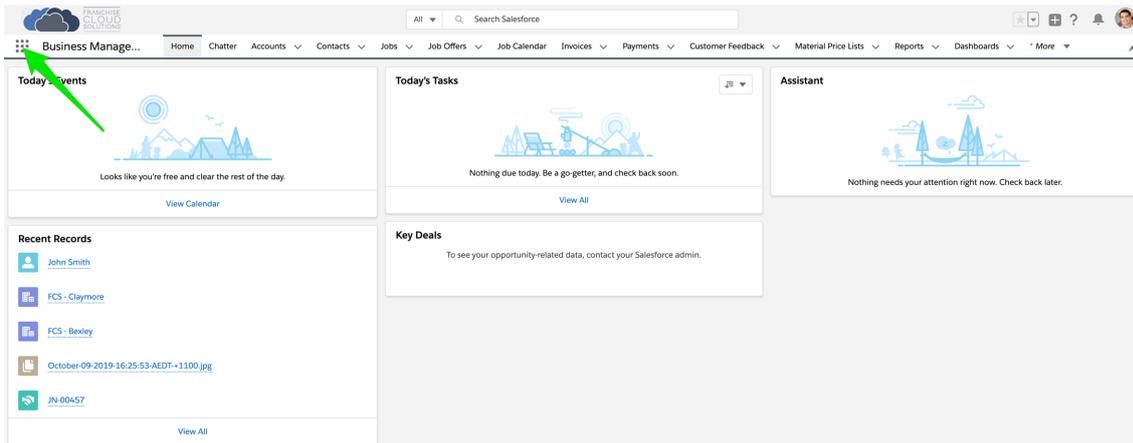
10. Wrap the copied URL into an HTML image tag. Replace *your link* in `<img src=c="your link"/>` with the copied image address. Distribute the URL wrapped in the img tag to the appropriate user.

# How to edit email template headers and footers

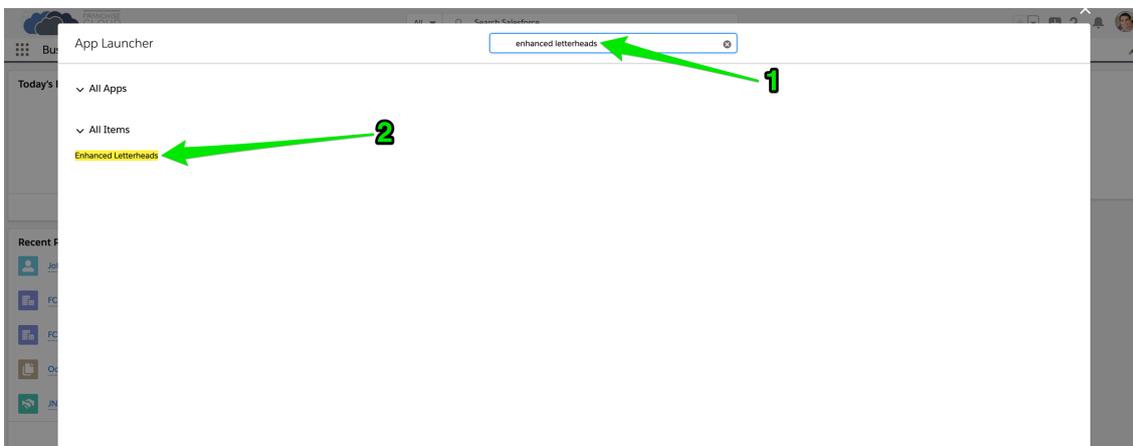
Most likely you will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

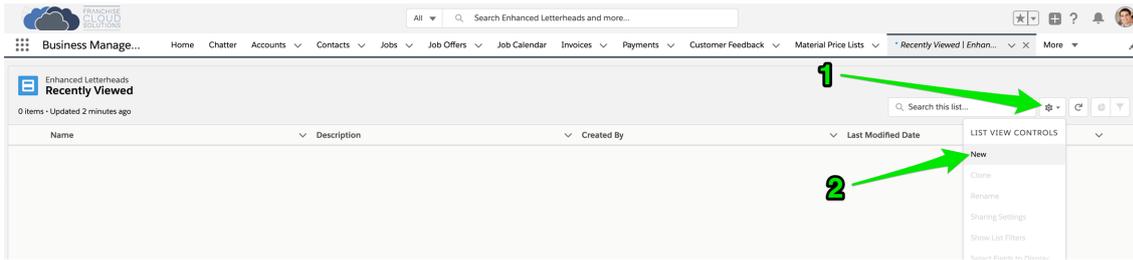
1. Open the App Launcher.



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



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



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

New List View

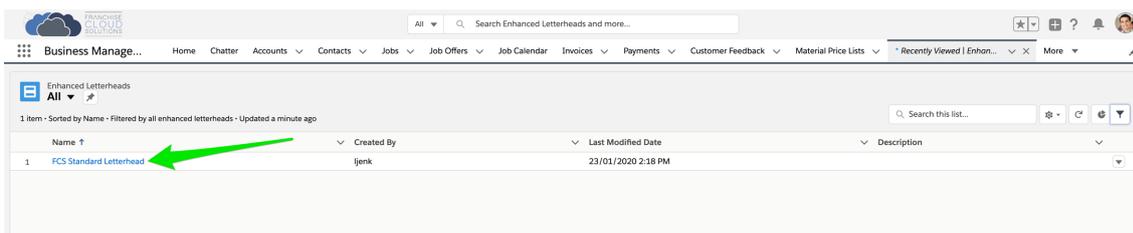
\*List Name  
All

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.

The screenshot shows the 'FCS Standard Letterhead' configuration page. The 'Details' section is expanded to show the following information:

- Information:** Name: FCS Standard Letterhead, Description: (empty)
- Letterhead Content:** Header: (empty), 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

The screenshot shows the 'FCS Standard Letterhead' configuration page with a different version of the letterhead configuration. The 'Details' section is expanded to show the following information:

- Information:** Name: FCS Standard Letterhead, Description: (empty)
- Letterhead Content:** Header: (empty), 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



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

# How to create a custom email template

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

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

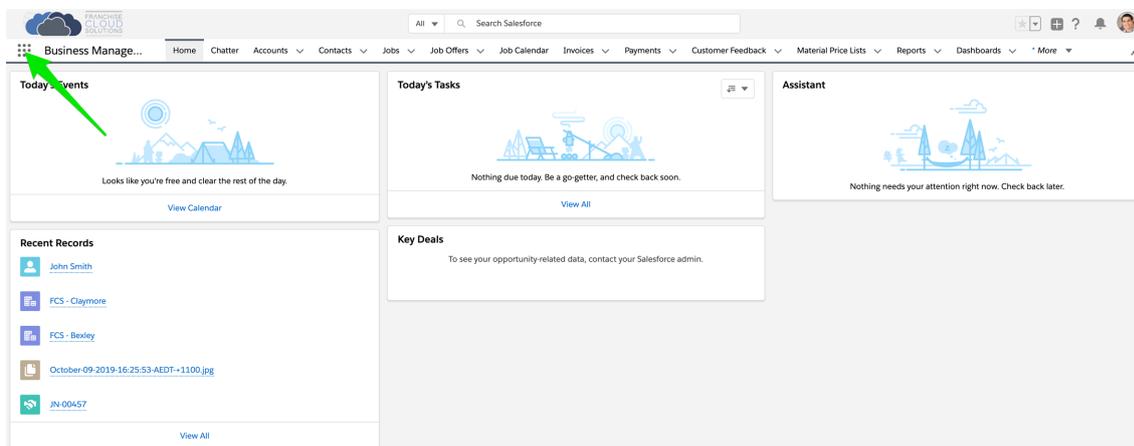


Email templates that are frequently created by our clients include

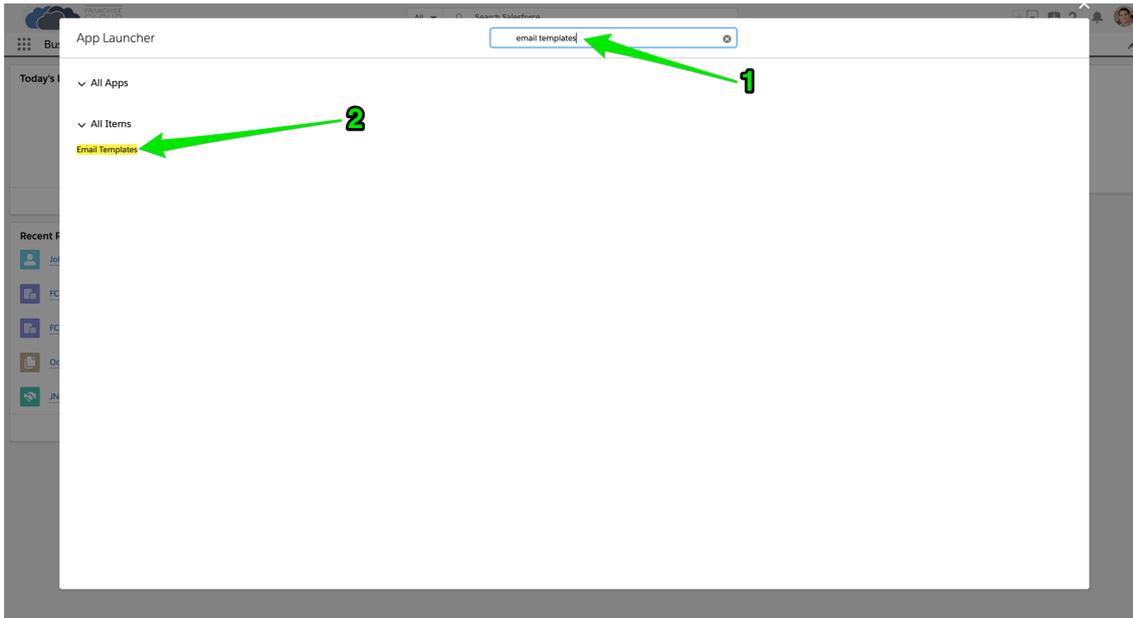
- » New customer initial contact
- » Returning customer initial contact
- » New Quote Job request
- » New Do & Charge Job request
- » Scheduled appointment notification
- » Quote email
- » Invoice email
- » Invoice overdue

## To create a custom email template

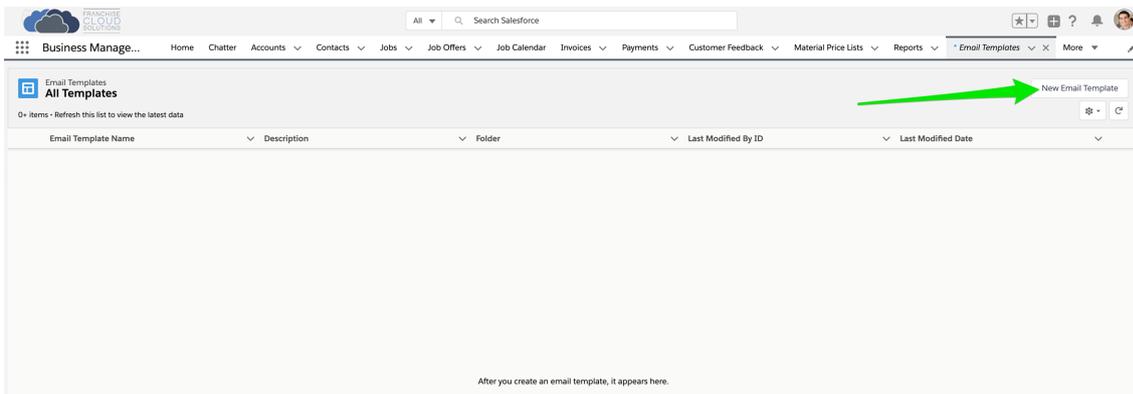
### 1. Open the App Launcher.



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



- 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.

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 <input type="text" value="My Quote Email Template"/>	Related Entity Type <input type="text" value="Job"/>
Description <input type="text"/>	Folder <input type="text" value="Private Email Templates"/>

**Message Content**

Subject <input style="border: 2px solid green;" type="text" value="FCS Invoice - {{{FCS_OPS__Job__c.Name}}}"/>	Enhanced Letterhead <input type="text" value="Search Enhanced Letterheads..."/>
---	--

HTML Value

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

[ ]

**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:   




**Additional Information**

Created By:  Last Modified By:



You can review the available letterheads. See “How to edit email template headers and footers” on page 172.

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

New Email Template

**Information**

* Email Template Name	Related Entity Type
<input type="text" value="My Quote Email Template"/>	<input type="text" value="Job"/>
Description	Folder
<input type="text"/>	<input type="text" value="Private Email Templates"/>

**Message Content**

Subject	Enhanced Letterhead
<input type="text" value="FCS Invoice - {{{FCS_OPS__Job__c.Name}}}"/>	<input type="text" value="FCS Standard 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
<input type="text"/>	<input type="text"/>

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

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

Source Font Size **B** *I* U **A** [List Icons] [Link Icon] [Image Icon]

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.

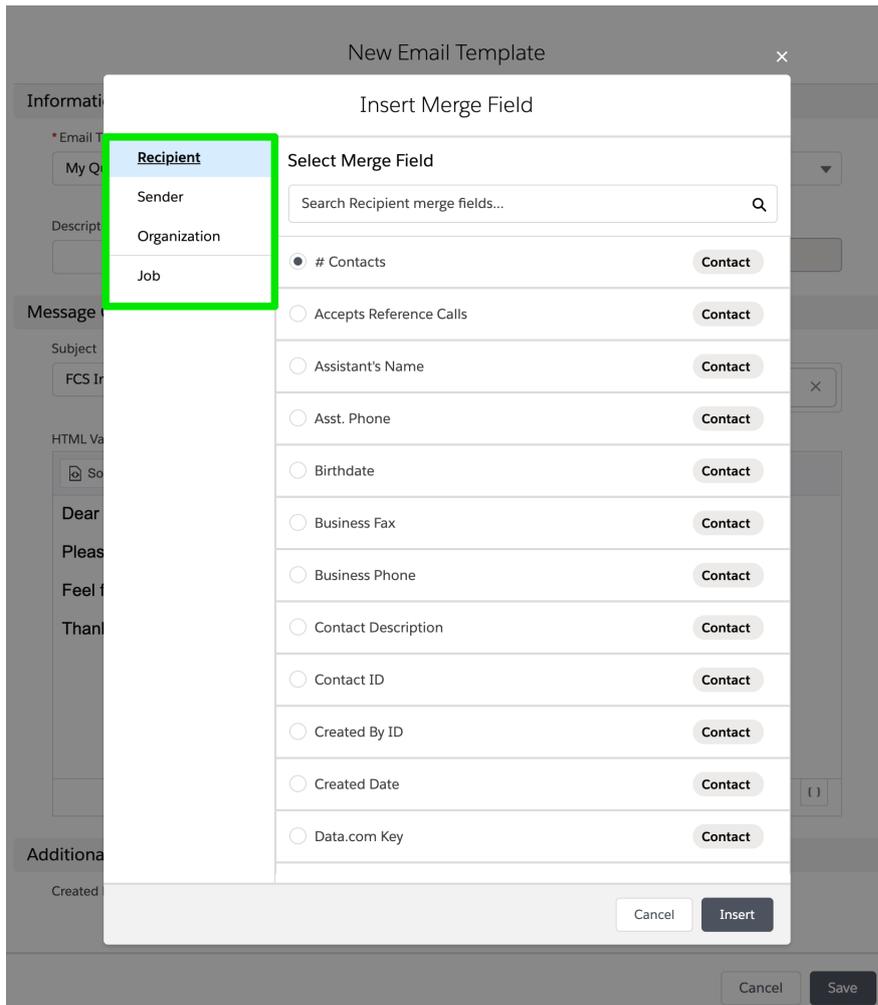
Thank you,



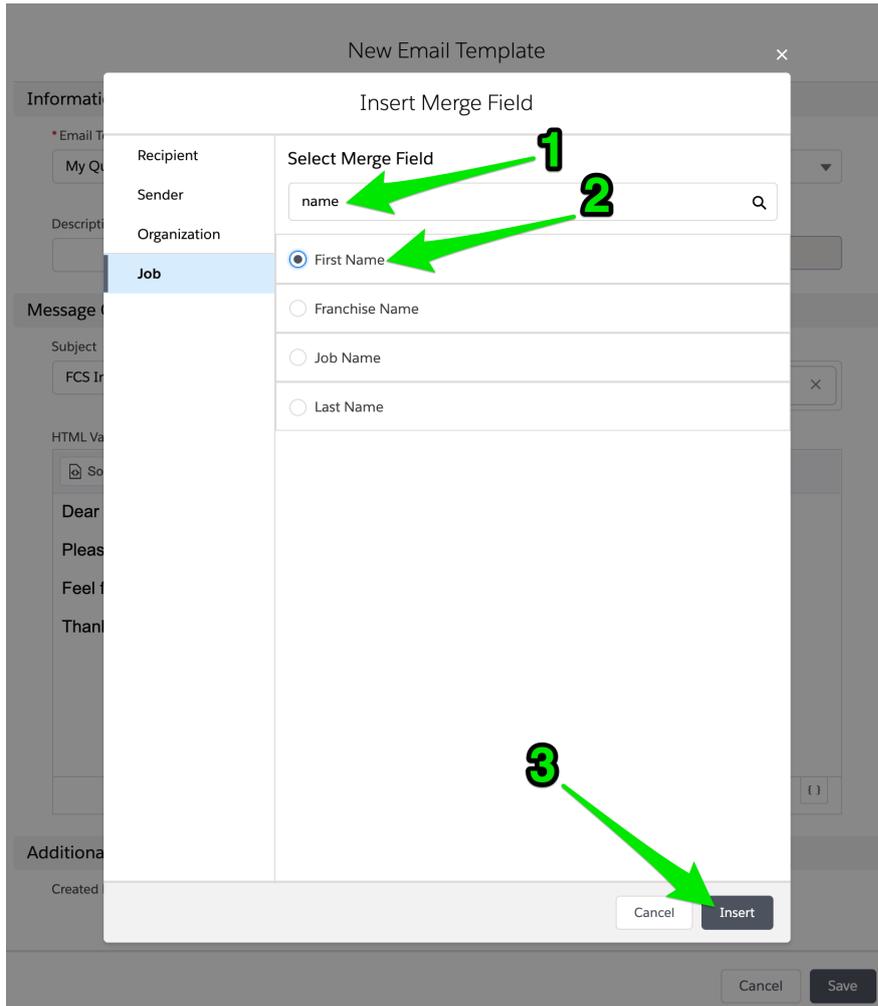
**Additional Information**

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 create a Quote email template

When you are using the Nextdoc for document generation, you need to use an email template for any Quotes you send to customers. You can use the standard Quote email template or you can create your own custom Quote email template.

## To create a custom quote email template

1. Follow the instructions in “How to create a custom email template” on page 175.
2. Ensure you base the `Entity Type` on `Job`.

# How to create an Invoice email template

When you are using the Nextdoc for document generation, you need to use an email template for any Invoices you send to customers. You can use the standard Invoice email template or you can create your own custom Invoice email template.

## To create a custom invoice email template

1. Follow the instructions in “How to create a custom email template” on page 175.
2. Ensure you base the `EntityType` on `Invoice`.

# How to configure Classic Email Templates

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

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



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

## To locate templates for editing

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

The screenshot shows the 'Setup' page with a search bar containing 'classic'. The search results on the left show 'Classic Email Templates' selected. The main content area displays 'Unfiled Public Classic Email Templates' and a table of email templates.

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit   Del	Communities: Changed Password Email	Text	✓	Notification of new password	sFCS	8/06/2018
Edit   Del	Communities: Forgot Password Email	Text	✓	Notification of new password when a user's password is reset (because they forgot it)	sFCS	8/06/2018
Edit   Del	Communities: New Member Welcome Email	Text	✓	Notification that user has been added to a community.	sFCS	8/06/2018
Edit   Del	Communities: User Lockout Email	Text	✓	Email a user receives when they try to reset their password, but have been locked out because of too many failed login attempts.	autoprocc	11/06/2018
Edit   Del	Contact: Follow Up (SAMPLE)	Text	✓	Follow up on meeting	sFCS	5/06/2018

2. From the **Folder** list, select *Job Management Templates*.

The screenshot shows the 'Setup' page with the search results on the left. The main content area displays 'Job Management Templates' and a table of email templates. A green box highlights the first three rows of the table, and a green arrow points to the 'Job Management Templates' folder in the folder list.

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit   Del	Accepted Or Declined Job Offer Template	HTML	✓		sFCS	8/06/2018
Edit   Del	Default Job Offer Template	HTML	✓		sFCS	10/09/2018
Edit   Del	Expired Or Timeout Job Offer Template	HTML	✓		sFCS	8/06/2018
Edit   Del	Job Confirmation Template	HTML	✓		sFCS	8/06/2018
Edit   Del	Quote Follow Up	HTML	✓		sFCS	8/06/2018
Edit   Del	Quote Management Template	HTML	✓		sFCS	8/06/2018

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

## To replace any of the templates

1. From the email template editing screen, configure the HTML and/or Plain Text versions as you see fit.
2. From the **Email Template Detail**, select and copy the `Template Unique Name`.

HTML Email Template [Help for this Page](#)

**Accepted Or Declined Job Offer Template (Managed)**

Preview your email template below.

This Email Template is managed, meaning that you may only edit certain attributes. [Display More Information](#)

**Email Template Detail** [Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Folder	Job Management Templates		
Email Template Name	Accepted Or Declined Job Offer Template	Available For Use	<input checked="" type="checkbox"/>
Template Unique Name	Accepted Or Declined Job Offer Template	Last Used Date	10/09/2018 4:14 PM
Namespace Prefix	FCS_OPS	Times Used	4
Installed Package	FranchiseOps		
Letterhead	Default Company Letterhead		
Email Layout	Free Form Letter		
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)		
Author	support FCS [Change]		
Description			
Created By	support FCS, 8/06/2018 10:57 AM	Modified By	support FCS, 8/06/2018 10:57 AM

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

3. Now go to the relevant **Configuration** record and paste the template's `Template Unique Name` into the appropriate job offer template field.

Job Allocation Setup

Distance Calculation	Straight Line	Timeout Per Offer	20
Distance Units	Kilometres	Timeout Per Job	120
Job Offer Processing	Sequential	No Timeout In Owned Area	<input type="checkbox"/>
Job Allocation Queue Name	Default Job Queue	One Offer At A Time	<input checked="" type="checkbox"/>
Org Wide Email Address Name	job_offers@7-16hjoq96zy262qeqdutrzs3yets041uwu114e7yj0r6jgnrbo.7f-7eutyua0.ap5.apex.salesforce.com	Offer Owned Area 24/7	<input type="checkbox"/>
Job Offer Email Template	Default Job Offer Template	Offer Inside Contact Hours Only	<input checked="" type="checkbox"/>
Expired Or Timeout Job Offer Template	Accepted Or Declined Job Offer Template	Queue In Territory Offers	<input checked="" type="checkbox"/>
Expired Or Timeout Job Offer Template	Expired Or Timeout Job Offer Template		
Job Type Eligibility	Off		
Eligibility Criteria Logic			
Duplicate Job Timeframe			
Duplicate Job Criteria	FCS_OPS__Last_Name__c && FCS_OPS__Suburb__c    FCS_OPS__Email__c    FCS_OPS__Mobile__c		

# How to convert a Classic Email Template to Lightning

Franchisees who have been using the Nintex document generation system may have Classic Email Templates that have been developed for Quote and Invoice delivery. Nextdoc uses Lightning Email Templates. To make use of your existing email templates, convert them to Lightning Email Templates so they can be used by Nextdoc.

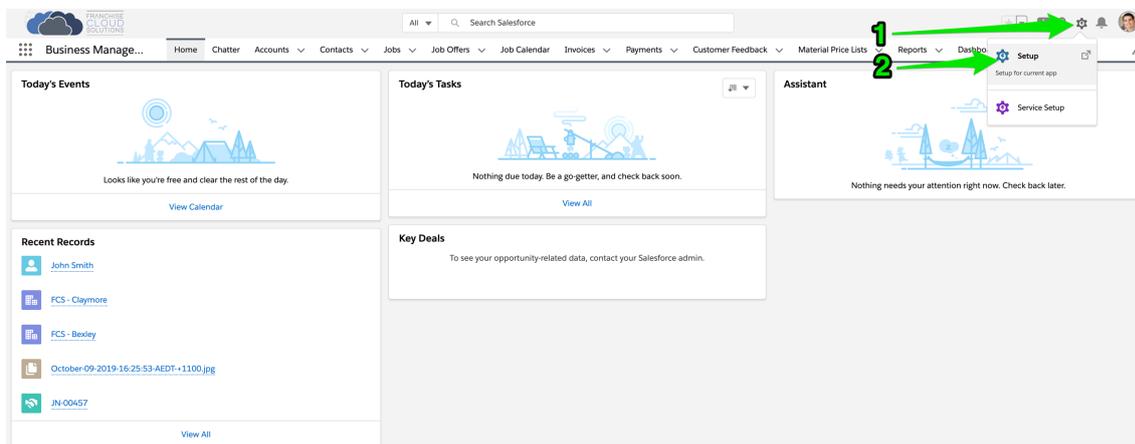


We do not expect you to create new Classic Email Templates.

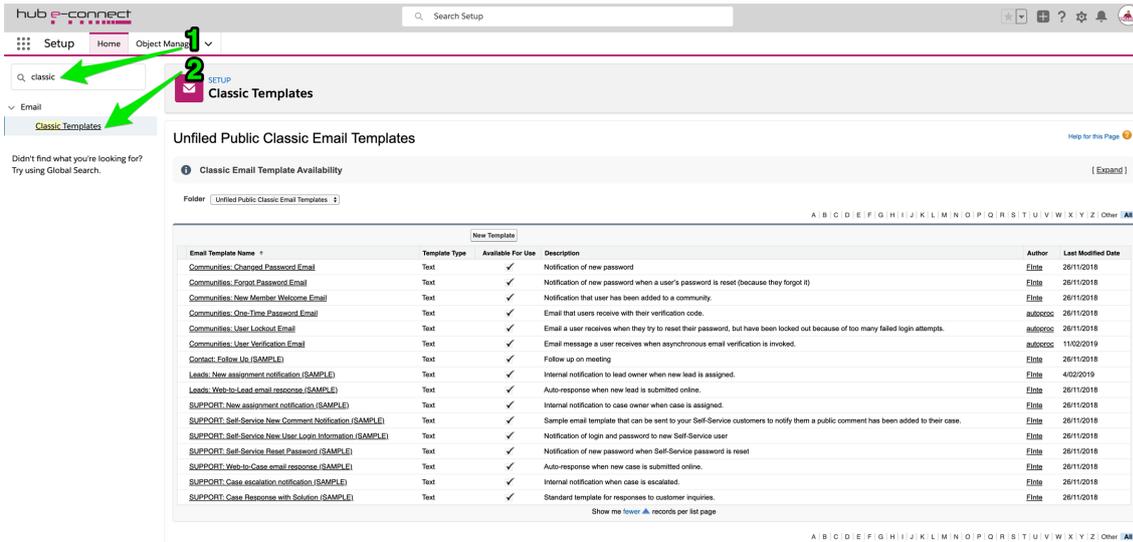
- » If you need to create new email templates, focus on creating Lightning Templates by working through the four linked topics in Step 1.
- » If you do have Classic Email Templates, convert them to Lightning Templates by following the instructions below.

## To convert a Classic Email Template to Lightning

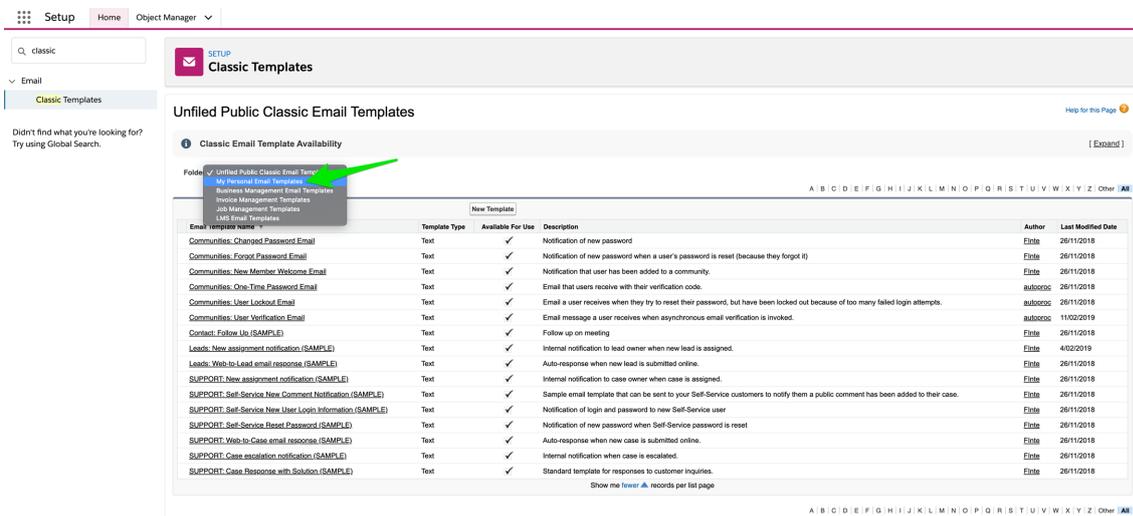
1. Review the steps for creating a Lightning Email Template. See
  - » “How to edit email template headers and footers” on page 172
  - » “How to create a custom email template” on page 175
  - » “How to create a Quote email template” on page 186
  - » “How to create an Invoice email template” on page 187
2. From the **Setup** menu, press **Setup**.



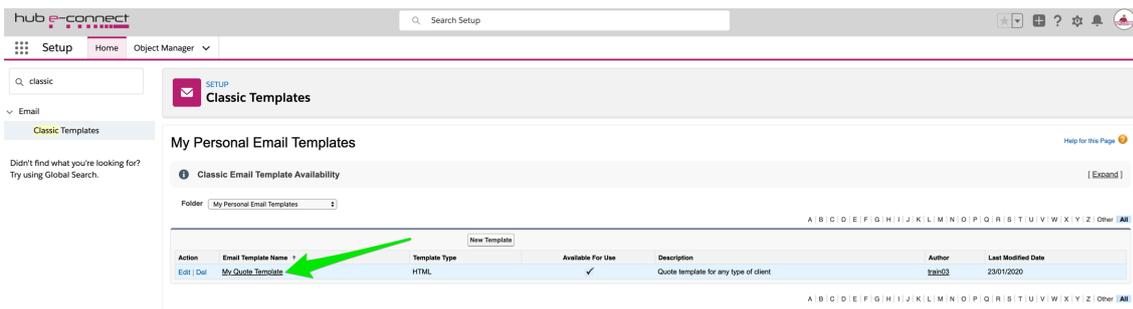
### 3. Using Quick Find, enter *Classic Templates* and select the Classic Template link.



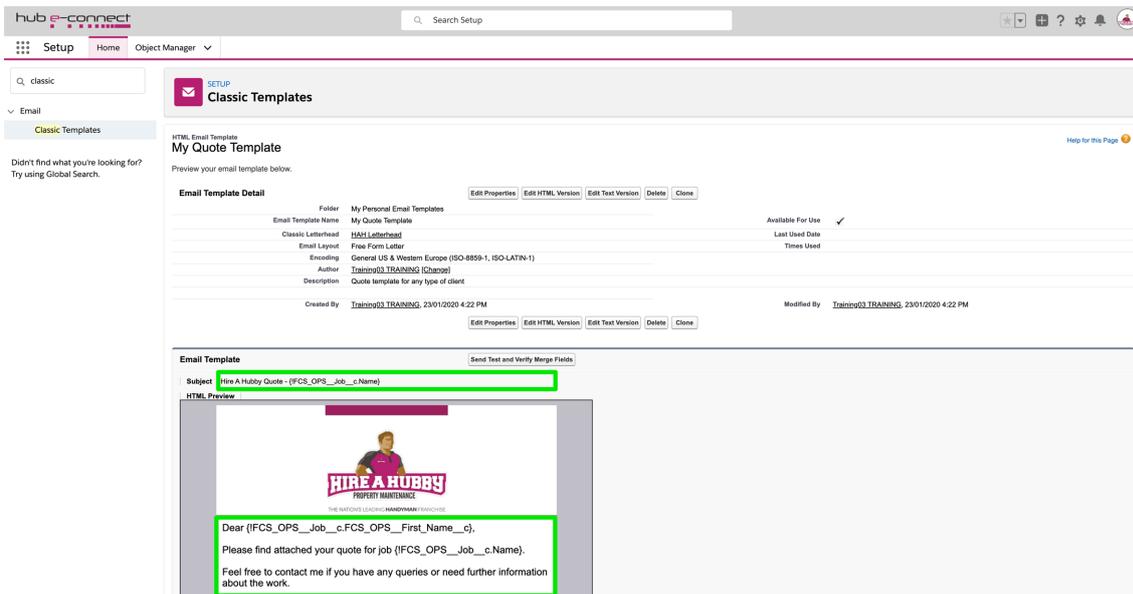
### 4. From Folder, select *My Personal Email Templates*.



### 5. Access the template you are wanting to convert.



- From the **Email Template**, copy the Subject line and the text from the email body. You can copy the email body from either the HTML Preview field or the Plain Text Preview field. Either paste the values into a text editor OR open another tab for the next stage of the process.



- Now create a new Lightning Template following the instructions given in
  - » “How to create a custom email template” on page 175
  - » “How to create a Quote email template” on page 186
  - » “How to create an Invoice email template” on page 187
- At the point of entering the Subject line and the Email body, paste in the Subject line or the Email body from the Classic Email Template.
- Replace the `{!` at the beginning of each merge field with a triple curly brace `{{{`
- Replace the `}` at the end of each merge field with a triple curly close brace `}}}`
- Save** and test the template.



It is possible that some of the merge fields may not yet be mapped to the correct object. Send a test email to yourself using the new template. If you can see a broken merge field in your test email, return to the Lightning Email Template, highlight the broken merge field, then use the Insert Merge Field button to locate the correct merge field.



Follow the instructions in “How to create a custom email template” on page 175 to learn how to insert merge fields.

# CHAPTER

# 13

## Working with the Job Booking Form

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How to change how you heard of us .....	195
How to add or remove fields .....	196
How to embed on your website .....	197
How to change form colors .....	198

# How to change job types

The standard job booking form begins with a list of job types your customers can request of you. The job types are populated from Salesforce. You can add new job types or prevent current job types from appearing.

## To add a new job type

1. From the app selector, search for **Job Types** and select the **Job Types** app.
2. Switch the **List View** to *All* and pin it.
3. Press the **New** button.
4. Complete the **New Job Type** dialog, including checking the *Active* checkbox then pressing **Save**. The New Job Type is now visible on the Job Booking form.

## To remove a job type from displaying in the Job Booking form

1. From the app selector, search for **Job Types** and select the **Job Types** app.
2. Switch the **List View** to *All* and pin it.
3. Click on the chosen **Job Type Number**.
4. From the **Job Type Details** page, uncheck the *Active* checkbox and press **Save**. The selected Job Type no longer displays within the Job Booking form.

# How to change how you heard of us

The standard job booking form contains a drop-down lists consisting of “ways the customer heard about us”. This drop-down is populated from **Sources** records.

## To add a Source to the how you heard of us list

1. From the app selector, search for **Sources** and select the **Sources** app.
2. Switch the **List View** to *All* and pin it.
3. Press the **New** button.
4. Work through the **New Source** dialog box, ensuring it is named, *Active*. Press **Save** when complete.

## To switch off a Source

1. From the app selector, search for **Sources** and select the **Sources** app.
2. Switch the **List View** to *All* and pin it.
3. Select the **Source Name**.
4. From the **Source Details** page, uncheck the *Active* checkbox. The Source no longer appears on the Job Booking form.

# How to add or remove fields

Fields are hard-coded in the form. To add or remove fields, lodge an *Admin as a Service* request through [Service Desk](#).

Fields are hard-coded in the form. To add or remove fields, lodge an *Admin as a Service* request through [Service Desk](#).

# How to embed on your website

Your Franchise Cloud Solutions consultant will provide you with a link to the Job Booking form.

With the link in hand, embed the Job Booking form on your website using an iframe.

[Instructions for embedding an iframe in a webpage can be found at the W3 Schools website.](#)

# How to change form colors

You can set the Job Booking form colors from a custom metadata setting.

## To set the branding colors on the Job Booking form

1. From Salesforce, click the **Setup** button and choose **Setup**.
2. In the **Quick Find** search box, enter “meta”. Select **Custom Metadata Types**.
3. From the list of **All Custom Metadata Types**, select **Manage Records** beside the *Branding* label.
4. Select **Primary**.
5. Press **Edit** and adjust the various colours.
6. Press **Save** when you are done.

# CHAPTER

# 13

## Configuring the Quote Landing Page

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# About customer quote acceptance

In FranchiseOps, a quote email can contain a link that enables the customer to indicate whether they accept or reject the quote.

- » the link takes them to a QuoteLanding page
- » a css stylesheet causes the QuoteLanding page to display using your brand logo, fonts and colors
- » the QuoteLanding page gives the customer the option to accept or reject the quote
- » if the quote contains options, the QuoteLanding page will present the customer with each option, enabling them to select which option they choose to accept
- » acceptance or rejection of a quote (or option) is immediately updated on the Job

# Obtain the QuoteLanding CSS Example

Franchise Cloud Solutions provide a sample [QuoteLanding CSS package](#). The package is a zip file, which you can unzip after downloading to your computer.

When you unzip the example, it will create a folder named **FCS** containing two files: **logo.png** and **styles.css**.



This format provides the an example of the static package you will create in order to configure your own QuoteLanding package.

# Provide your brand logo

To create the package and provide your logo

1. Beside the sample **FCS** folder unzipped from your example, create a new folder named after your brand name or acronym.
2. Into that folder store your company's logo as a png file.
3. Name the image **logo.png**.

# Configure the styles.css file

As part of the example package, we provide a styles.css file that gives you the capability of simple styling. Or, if you would prefer to involve your normal web agency, you can develop a completely custom styles.css file in order to better reflect consistent branding.

## Simple brand customization of the styles.css file

1. Copy the example **styles.css** into the brand folder you created earlier. See “Provide your brand logo” on the previous page.
2. Open it in a text editor to reveal the contents. The following code snippet shows the first 24 lines within the file. We’ve chosen to show this much of the file because this portion of the file has been designed for easy customization.

### Configurable lines in styles.css

```
1  /*<meta />*/
2
3  @import url('https://fonts.googleapis.com/css?family=Nunito+Sans');
4
5  @font-face
6  {
7    font-family: 'Nunito Sans Light';
8    src: url(../Fonts/NunitoSans-Light.ttf);
9  }
10
11 @font-face
12 {
13   font-family: 'Nunito Sans Regular';
14   src: url(../Fonts/NunitoSans-Regular.ttf);
15 }
16
17 :root
18 {
19   --BrandFont: 'Nunito Sans Regular', sans-serif;
20   --BrandColor: #073763;
21   --HeadingColor: #0a5394;
22   --TextColor: #666666;
23   --TextInverse: #FFFFFF;
24 }
```

3. If you wish to provide your brand font, you can change the **@import** and **@font-face** directives to contain the font-family of your choice.

4. Within the `:root` section, provide your company's values for the following variables.
  - » BrandFont
  - » BrandColor
  - » HeadingColor
  - » TextColor
  - » TextInverse
5. When you've replaced the variables with your brand values, save the file.



### **Congratulations**

This is all that's needed for simple customization of the `styles.css` file.



### **To provide a better brand experience**

You may choose to pass the `css` file to your web agency, together with the URL for your QuoteLanding page. You can find the URL for your QuoteLanding page described in "Add the quote acceptance link to your quote email template" on page 208.

# Prepare and update the QuoteLanding static file

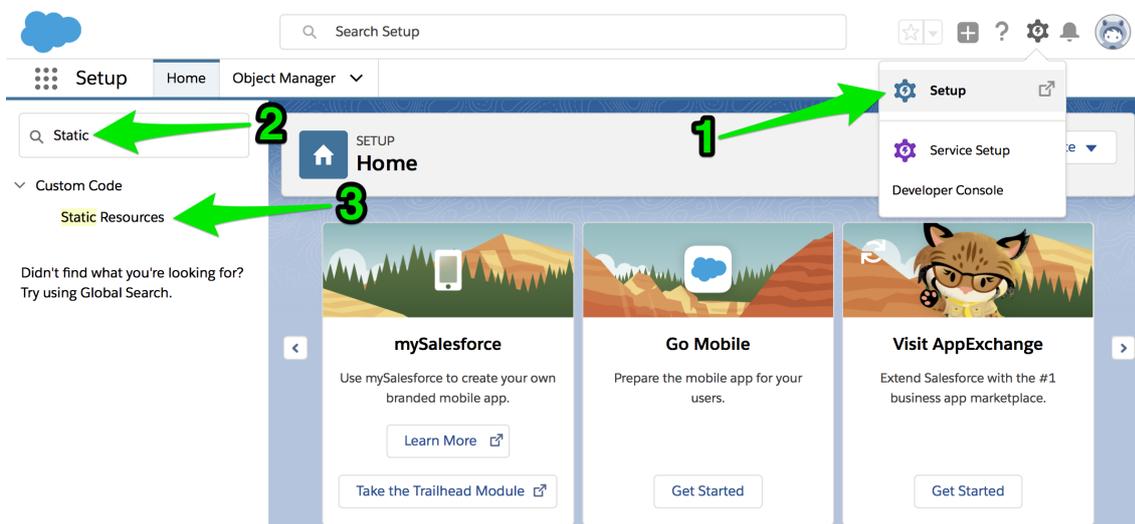
By now you should have all the files you need to create the QuoteLanding static file.

- » A folder named after you brand name or acronym
- » Inside the folder, is an image file `logo.png`
- » Beside it is a css file, `styles.css`

If this is what you've got, you're ready to create and upload the QuoteLanding static file.

## Update the default QuoteLanding static file

1. In your file system, move to a position "above" your brand folder. Select your brand folder and, using your zip utility, zip it. Name the zip file **QuoteLanding.zip**.
2. Now, in Salesforce, go to **Setup** and search for *Static Resources*.



### 3. Click on the QuoteLanding link.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like 'Setup Home', 'ADMINISTRATION', 'PLATFORM TOOLS', and 'SETTINGS'. The main content area is titled 'Static Resources' and contains a table of resources. A green arrow points to the 'QuoteLanding' resource in the table.

Action	Name	Namespace Prefix	Description	MIME Type	Size	Created By Alias	Created Date	Last Modified Date	Cache Control
<a href="#">Edit</a>   <a href="#">Del</a>	assets	nxd		application/zip	1,204	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Private
<a href="#">Edit</a>   <a href="#">Del</a>	Audit_Resource			text/csv	11,224	OM	12/8/2022	14/10/2022, 3:29 pm	Private
<a href="#">Del</a>	Audit_Resource_Template	FCS_OPS	The template contains pre-defined format for audit questions	application/vnd.ms-excel	1,620	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Private
<a href="#">Del</a>	break	FCS_OPS		image/gif	924	sa1	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	stock	FCS_OPS		image/png	1,003	sa1	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	CompanyVLogo	FCS_OPS		image/jpeg	38,087	sa1	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	fullCalendarScheduler	FCS_OPS		application/x-zip-compressed	640,471	sa1	10/8/2022	24/8/2022, 3:10 pm	Public
<a href="#">Del</a>	GoogleMapMarkersFiles	FCS_OPS	Google Map Marker Images and Style Sheet	application/x-zip-compressed	8,844	FCSSur	10/8/2022	24/8/2022, 3:10 pm	Public
<a href="#">Del</a>	joint	FCS_BASE		application/x-zip-compressed	463,340	FCSSur	10/8/2022	26/10/2022, 4:16 pm	Private
<a href="#">Del</a>	Lightning_Security	FCS_BASE		application/zip	341,017	FCSSur	10/8/2022	26/10/2022, 4:15 pm	Public
<a href="#">Del</a>	locked	FCS_OPS		image/png	1,101	sa1	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	mapping	nxd	Assets for the Nextdoc Mapping Tool	application/zip	650,893	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Private
<a href="#">Del</a>	onSite	FCS_OPS		image/png	490	sa1	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Edit</a>   <a href="#">Del</a>	ptreview	nxd		application/zip	646,931	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Private
<a href="#">Edit</a>   <a href="#">Del</a>	progressbarstyle			text/css	3,081	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Edit</a>   <a href="#">Del</a>	QuoteLanding			application/zip	3,234	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	siteAsset_e1811cf542674c6fa78a47ba971aa3fa	FCS_BASE	Template detail image	image/png	18,007	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Edit</a>   <a href="#">Del</a>	SiteSamples		Static resource for sites sample pages	application/zip	42,080	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	SiteSamples	FCS_OPS	Static resource for sites sample pages	application/zip	42,080	FCSSur	10/8/2022	24/8/2022, 3:10 pm	Public
<a href="#">Del</a>	SLDS	FCS_BASE	Lightning design system version 2.3.1	application/zip	3,826,252	FCSSur	10/8/2022	26/10/2022, 4:16 pm	Public
<a href="#">Edit</a>   <a href="#">Del</a>	StiformStyle			text/css	3,164	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	SupplierInvoiceModalCSS	FCS_OPS		text/css	106	sa1	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	SyncBoth	FCS_OPS		image/jpeg	1,950	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	SyncDown	FCS_OPS		image/jpeg	1,867	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Public
<a href="#">Del</a>	SyncNone	FCS_OPS		image/jpeg	1,935	FCSSur	10/8/2022	10/8/2022, 4:37 pm	Public

### 4. Now click on the Edit button.

The screenshot shows the 'Static Resource Detail' page for 'QuoteLanding'. The page displays various metadata fields such as Name, Namespace Prefix, Description, MIME Type, Cache Control, Size, Created By, and Last Modified By. A green arrow points to the 'Edit' button at the top of the page.

Field	Value
Name	QuoteLanding
Namespace Prefix	
Description	
MIME Type	application/zip
Cache Control	Public
Size	3,234 bytes
View file	<a href="#">View file</a>
Created By	QPS.Field Manager 10/8/2022, 4:37 pm
Last Modified By	QPS.Field Manager 10/8/2022, 4:37 pm

5. Select the **Choose File** button. Select the QuoteLanding zip file from your computer. Then choose **Save**.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The left sidebar lists various setup options. The main content area is titled 'Static Resources' and shows the 'QuoteLanding' static resource being edited. The 'Static Resource Information' section includes a 'Name' field with 'QuoteLanding', a 'Description' field, a 'File' field with a 'Choose file' button and 'No file chosen' text, and a 'Cache Control' dropdown set to 'Public'. At the bottom of the form are 'Save' and 'Cancel' buttons. Two green arrows with numbers '1' and '2' are overlaid on the image, pointing to the 'Choose file' button and the 'Save' button respectively.



## Congratulations

You've now updated your QuoteLanding static file in Salesforce.

# Add the quote acceptance link to your quote email template

You will first need to define your QuoteLanding link, then include that link in your quote acceptance email template.

## To define your QuoteLanding link

1. The following snippet shows the format of the URL you will need to construct.

```
https://[your_site]/fcs_ops__updatequotejob?jobId={{FCS_OPS__Job__c.Id}}&brand=[YOUR_BRAND]
```

2. Replace [your\_site] with the site name configured in **Setup > Sites**.
3. Replace [YOUR\_BRAND] with the name of the brand folder included in your QuoteLanding static file.



You should now have a defined QuoteLanding link.

## To add your QuoteLanding link to your email quote template.

1. Follow the procedure for creating a Quote email template. See “How to create a Quote email template” on page 186
2. Within the email body, include a line with something like:

```
Click HERE to accept the quote.
```

3. In the **HTML Value** field, highlight the word **HERE**, and click the **Link**  button. Paste your QuoteLanding link into the **Link URL** field. Press **Save**.
4. Now **Save** the Email Template.



### Congratulations

If you've followed all the instructions in this chapter, you're now ready to test customer quote acceptance.

# CHAPTER

# 13

## Configuring GSuite and Office 365 Synchronization

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# Introducing Einstein Activity Capture

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

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

When synchronization is set up:

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

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

- » "Considerations for EAC Email Sync" on page 212
- » "Considerations for EAC Event and Contact Sync" on page 215



## Salesforce App Contact Sync

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

This is done through through the Salesforce app, and requires

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



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

# Considerations for EAC Email Sync

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

## How Salesforce EAC Email Sync works

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

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



### How EAC matches emails with Accounts and Contacts

If a Personal Account has an email address, EAC will match any email to or from this email address with the Account.

If there is no Account match, it will attempt to match against a Contact's email address. This is likely in the case of Business Accounts, which by default have no personal email addresses.

There are other matching strategies, including matching against Opportunities if you're using Franchise Recruitment, but these are the most common.

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

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

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

## Considerations for using EAC with Franchise Recruitment

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

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

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

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

## Considerations using EAC with Operations Management

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

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



Further, if you have granted franchisees access to the system (whether that be through Business Management, Partner Portal or Mobile licenses) they will be able to view the Franchise Profile Account. If anyone in a head office team are having confidential discussions with or about a franchisee, it is likely that email will be captured and stored on the Franchise Profile Account, which the franchisee has access to. This lack of privacy of confidential information is a significant negative consideration for any Franchise Cloud Solutions customer whose franchisees access Salesforce.

However, you can mitigate this by excluding emails that only involve email participants within specified domains. See the Salesforce documentation for Excluded Addresses.

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

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

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

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



## Recommendation for Operations Management users

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

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

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

This recommendation has practical advantages of

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

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

## Considerations using EAC for Business Management

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

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

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

# Considerations for EAC Event and Contact Sync

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

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

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



If contact sync is set up bi-directionally:

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



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



## Recommendation

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

# How to configure users for EAC Sync

Users who wish to sync via EAC require appropriate permissions.

## To setup users for EAC

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



Now proceed to configure EAC Sync, See “How to configure EAC Sync” on the facing page.

## To add users to an existing EAC Sync configuration

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



### What to expect following configuration

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



### Check status of a user's EAC Sync

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

# How to configure EAC Sync

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



## Before you begin

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

## To configure Einstein Activity Capture for the first time

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



## Operations Management and Business Management Configurations

For deployment on Franchise Operations, we recommend creating separate configurations for head office users and for franchisee users.

6. Determine whether this configuration will sync any combination of Email, Events, or Contacts.



## Considerations

Please take into account “Considerations for EAC Email Sync” on page 212 and “Considerations for EAC Event and Contact Sync” on page 215.

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



#### **For more information**

Refer to the Salesforce [Einstein Activity Capture documentation](#).

# CHAPTER 13

## Managing Other Data

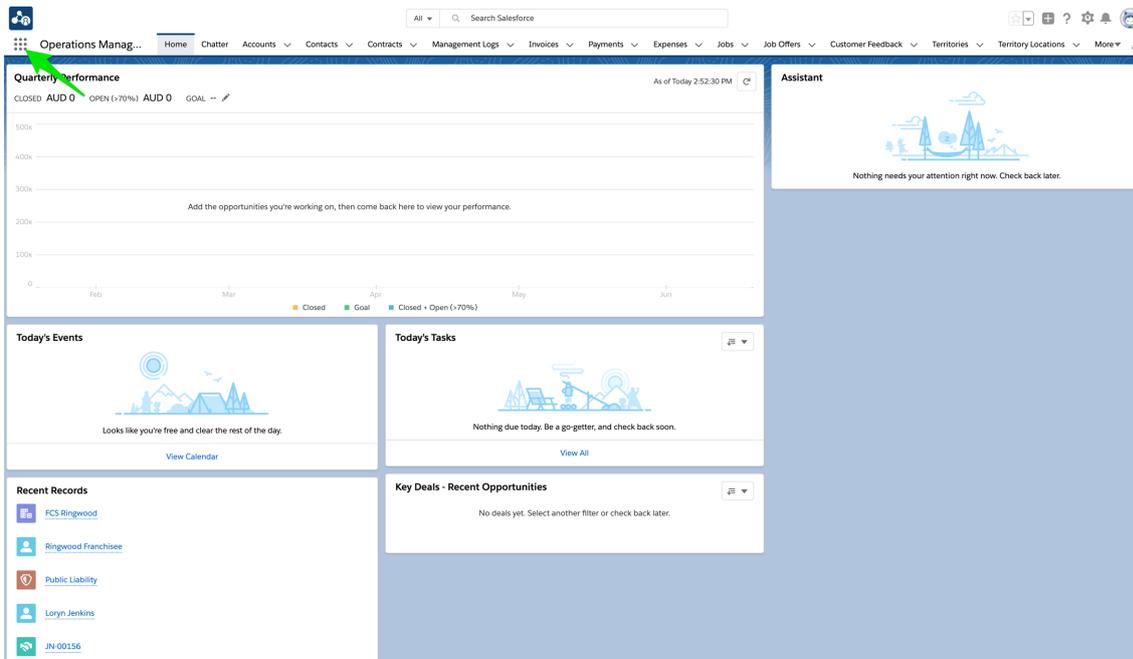
How to add a job source .....	220
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# How to add a job source

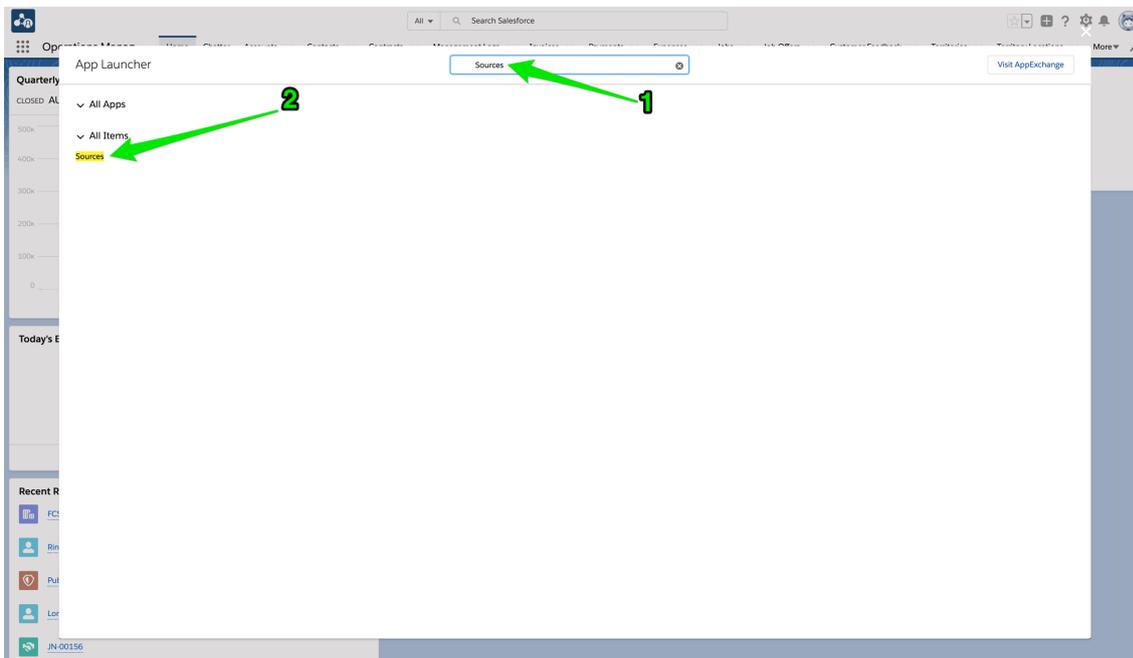
Job Sources fill the job creation form's "How did you hear of us?" drop down list. Adding or disabling Job Source items determines which items are presented to the general public.

## To add a job source

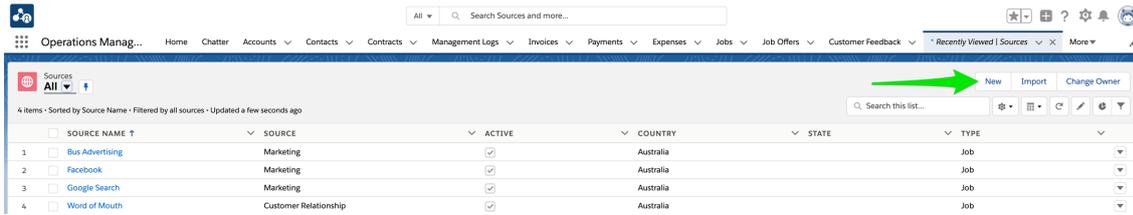
1. Select the Salesforce App Launcher.



2. Using the search box, search for *Sources*, and select the **Sources** app.



3. From the **Sources** list, press **New**.



4. The **New Source** dialog box appears. Complete the dialog box (making sure you check **Active**) and press **Save**.

New Source

---

**Information**

\*Source Name  Owner **Loryn Jenkins**

Source  Country   
View all dependencies

Type  State   
View all dependencies

Active

**System Information**

Currency

5. The Job Source is now added.

### To remove a job source

1. Uncheck the **Active** checkbox, then **Save** the record.

This will make the item no longer visible to the general public and retain it for reporting purposes.



Type must be set to *Job* and *Active* set to *True* for the Source Name to appear on the Create Job form.

Sources can be added for specific Countries or States.

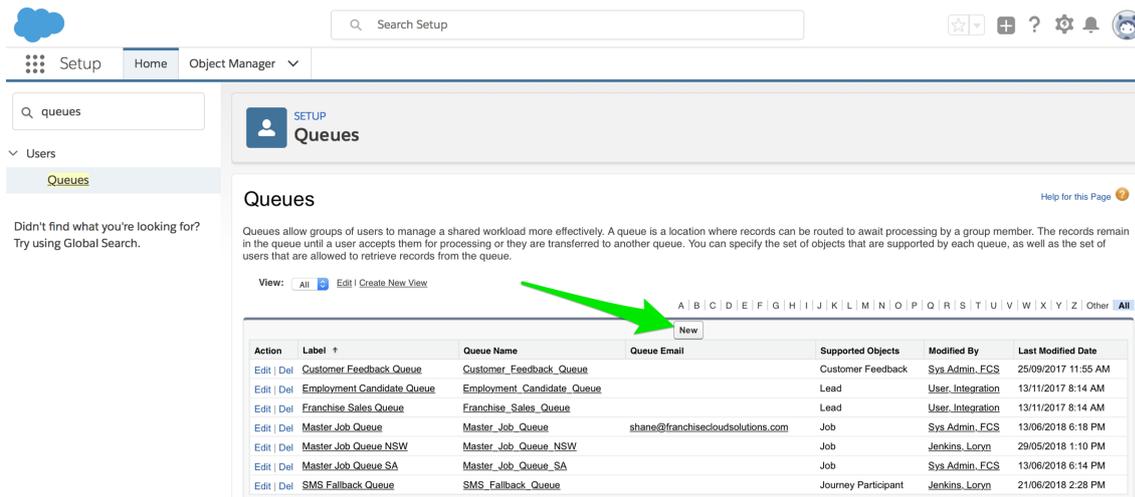
Field	Description
Source Name	The name of the source item. Can be seen by the general public.
Type	Determines whether this item is connected to the Create Job form.
Source	Tracks the job source origin by medium.
Active	Determines whether this item is visible.
Country	If Country is selected, appears in the “How did you hear of us?” list only if the customer identifies that they are in the given Country.
State	If State is selected, appears in the “How did you hear of us?” list only if the customer identifies that they are in the given Country and State.

# How to create a Salesforce queue

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

## To create a queue

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



The screenshot shows the Salesforce Setup interface for the 'Queues' page. The page title is 'Queues' and it includes a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. A sidebar on the left shows the navigation menu with 'Users' and 'Queues' options. The main content area contains a table of existing queues. A green arrow points to the 'New' button located in the top right corner of the table's header area.

Action	Label ↑	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	Customer Feedback Queue	Customer_Feedback_Queue		Customer Feedback	Sys_Admin_FCS	25/09/2017 11:55 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Employment Candidate Queue	Employment_Candidate_Queue		Lead	User_Integration	13/11/2017 8:14 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Franchise Sales Queue	Franchise_Sales_Queue		Lead	User_Integration	13/11/2017 8:14 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Master Job Queue	Master_Job_Queue	share@franchisecloudsolutions.com	Job	Sys_Admin_FCS	13/06/2018 6:18 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Master Job Queue NSW	Master_Job_Queue_NSW		Job	Jenkins_Loryn	29/05/2018 1:10 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Master Job Queue SA	Master_Job_Queue_SA		Job	Sys_Admin_FCS	13/06/2018 6:14 PM
<a href="#">Edit</a>   <a href="#">Del</a>	SMS Fallback Queue	SMS_Fallback_Queue		Journey Participant	Jenkins_Loryn	21/06/2018 2:28 PM

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

The screenshot shows the 'New Queue' form in a software interface. The form is titled 'Queue Edit' and includes the following sections:

- Queue Name and Email Address:** This section contains fields for 'Label' (Master Job Queue NSW), 'Queue Name' (Master\_Job\_Queue\_NSW), and 'Queue Email' (mjq@franchisecloudsoluti). There is also a checkbox for 'Send Email to Members'.
- Supported Objects:** This section allows selecting objects to assign to the queue. It shows a list of 'Available Objects' (Document Request, Error Log, Event Description, Expense, Goal, Invoice, Job Eligibility Criteria, Job Offer, Job Offer Ranking Criteria, Job Type, Journey, Journey Participant, Knowledge Article Version, Lead) and a 'Selected Objects' list containing 'Job'.
- Queue Members:** This section allows adding members to the queue. It shows a search for 'Users' and a list of 'Available Members' (User: Loryn Jenkins, User: Port Adelaide Franchise Owner, User: REC Administrator, User: REC Marketing Manager, User: REC Sales Manager, User: SMS Management Site Guest User, User: Shane Ross, User: Shikher Chowdhary, User: Simon Walker, User: Thomas Pham, User: Warren Jones) and a 'Selected Members' list (User: OPS Administrator, User: OPS Compliance Manager, User: OPS Field Manager, User: OPS Finance Manager, User: OPS Head Office Manager, User: OPS Operations Manager, User: OPS SA Operations Manager).

- Enter the public name of this queue in the `Label` field. The value in `Label` will be visible as the name of the List View attached to this queue.
- Optionally enter a `Queue Email`.
- Optionally select `Send Email to Members`. Members are specified in the **Queue Members** section of the form.
- Select the Object types that will be stored in this queue. This will determine the record types that are placed in this queue.
- Select the users who will comprise the **Queue Members**.
- Press **Save**.

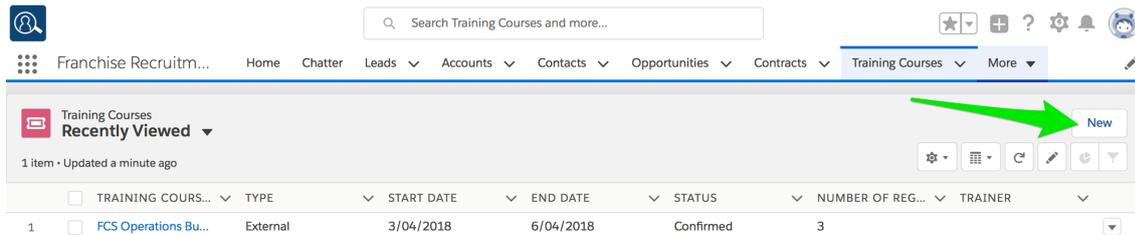
# How to create a training course

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

Once a course is created, users can register attendees.

To create a training event:

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



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

New Training Course

---

**Information**

\* Training Course Name:

Owner: REC Administrator

\* Type:

Trainer:

\* Status:

Assessor:

\* Start Date:

\* End Date:

**System Information**

Currency:

## Field Notes

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

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



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

# How to create an activity template

An activity template allows you to generate an activity list attached to an object of a given type. An activity list contains a list of tasks, some of which are generated only when a prior task is complete.

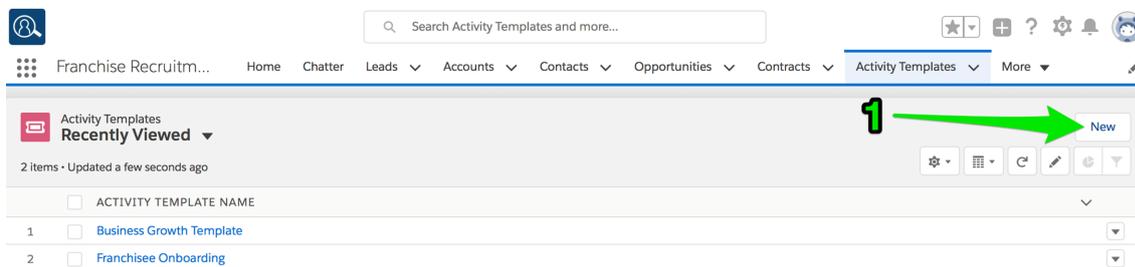


Activity Lists can be attached to any object that:

- » is configured for activities (i.e. has an activity history)
- » is not a User, Lead or Contact

## To create an activity template

1. From the Salesforce menu, choose **Activity Templates**.
2. To create the template, press **New**.



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

Activity Template

---

<p>*Name</p> <input type="text" value="Franchisee On-boarding Process"/>	<p>*Target Object</p> <input type="text" value="Contract"/>
<p>Template Active</p> <input checked="" type="checkbox"/>	<p>Retention Period</p> <input type="text" value="10"/>

The Activity Template header displays.

The screenshot shows the header of the 'Franchisee On-boarding Process' activity template. It includes a search bar, navigation tabs (Home, Chatter, Leads, Accounts, Contacts, Opportunities, Contracts, Activity Templates, More), and a header bar with the template name and actions (Edit, Clone, Delete). Below the header, there are two tabs: 'DETAILS' and 'RELATED'. The 'DETAILS' tab is active, showing fields for Activity Template Name, Target Object, Active status, Created By, Owner, Retention Period, No Of Tasks, and Last Modified By.

- From the **Related** tab, create a **New** activity list.
- From the **Create Task** dialog box, complete the task details and press **Save**.

Create Task

---

<p>*Name</p> <input type="text" value="New Franchisee Induction course"/>	<p>Active</p> <input checked="" type="checkbox"/>
<p>Days To Due</p> <input type="text" value="5"/>	<p>Prerequisite Task</p> <input type="text"/>
<p>*User Assignment Method</p> <input type="text" value="Related User"/>	<p>*Description</p> <input type="text" value="Mandatory induction course for new franchisees"/>
<p>*Related User Relationship</p> <input type="text" value="OwnerId"/>	

The task is added to the activity list.

- Now add the remaining tasks you need for the template to be complete.

### Field Notes (Activity Template)

- » Enter a **Name** as the primary user identifier for the template.
- » **Target Object** specifies the object type the activity list can be attached to.

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

### Field Notes (Create Task)

- » Enter a `Name` as the primary user identifier for the task.
- » `Days to Due` sets the due date on the task as the specified number of days after the task is generated. For dependent tasks, this is the number of days after the completion of the task on which it was dependent.
- » There are three `User Assignment` methods.
  - » Select `Static User` if there is a single person in your organization who will perform this task. You set the user in the dependent `Assign To` field.
  - » Select `Related User` if you want Operations Management to select a user based on a defined relationship. When this is selected, you need to enter the relationship to be used into the `Related User Relationship` field. You can choose any relationship defined on the target object that looks up a user.
- »  The most commonly used relationship is `OwnerId`.
- » Select `Search User` when you want to dynamically assign the user who is to complete the task based on role or position hierarchy within your organization.
- » Set `Active` to `true` to generate the task at run-time. Set it `false` it when you no longer want the task to be generated.
- » Select the name of a `Pre-requisite Task` if you want the task to be generated only on completion of the prior task.
- » Enter a user friendly `Description` to clarify the purpose of the task.
- » Optionally enter a URL into the `Documentation Link` to identify which aspect of the procedure or operations manual this step represents.



## Related User Examples

The examples below are based on the **Account** object. It shows field references on both the Account object and in related objects. To learn about field references, See “How to identify a Field API Name” on page 239.

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



## Related User queries must return user ids

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



## Searched User Example

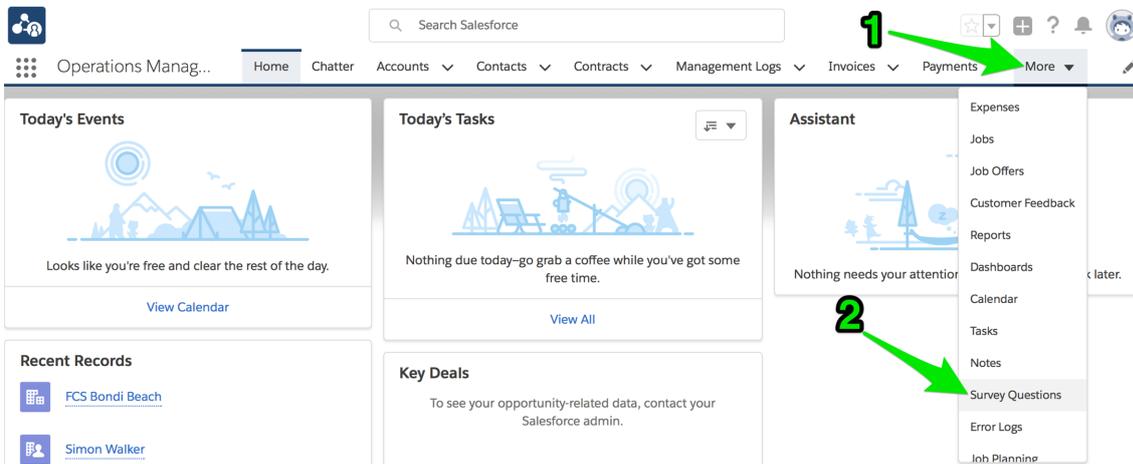
The example below is based on the Account object. It uses packaged and custom fields.

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

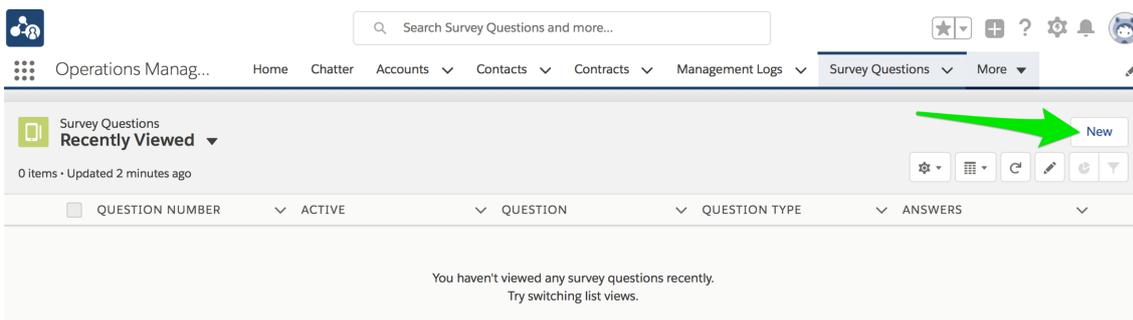
# How to create job satisfaction survey questions

To enter a job satisfaction survey question

1. From the Salesforce menu, select **Survey Questions**.



2. From Survey Questions, press **New**.



The **New Survey Question** dialog box appears.

### 3. Select the Question Type.

#### New Survey Question

**Information**

Question Number **1**

\*Question Type **2**

--None--

- ✓ --None--
- Text Area
- Picklist
- Radio Button
- Multi-Select

Australian Dollar

Owner  
OPS Administrator

Display Order

Active

Cancel Save & New Save



Each question type will present answers to the question in a different format.

4. Write the **Question**. Enter each **Answer** as a comma-separated string. Complete the remainder of the question details, then press **Save**.

### New Survey Question

**Information**

Question Number	Owner OPS Administrator
* Question Type Radio Button	Display Order 1
* Question How would you rate your overall satisfaction with our s	Active <input checked="" type="checkbox"/>
Answers 1,2,3,4,5	

**System Information**

Currency Australian Dollar
-------------------------------

Cancel Save & New **Save**

The completed **Survey Question** record displays.

Operations Manag... Home Chatter Accounts Contacts Contracts Management Logs Survey Questions More

Search Survey Questions and more...

Survey Question QN-00025 Edit Delete Clone

DETAILS	RELATED
Question Number QN-00025	Owner OPS Administrator
Question Type Radio Button	Display Order 1
Question How would you rate your overall satisfaction with our service?	Active <input checked="" type="checkbox"/>
Answers 1,2,3,4,5	

 When a job satisfaction survey is sent, all **Active** questions are included within the survey.

# How to generate a Tyro API Key

Tyro is an optional payment processor bundled with Franchise Cloud Solutions. Accessing it requires

- » opening a Tyro account
- » setting up customized pages to initiate the payment gateway ([talk to us](#) about doing so), and
- » generating the API key

This topic assumes the franchisee has made an application to open a Tyro account. It describes what you need to do to generate a franchisee Tyro API key.

## To generate a Tyro API Key

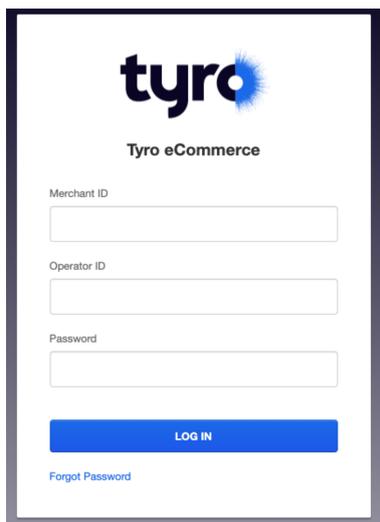
1. The franchisee has received email informing them of MPGS account access. The email will contain the following information.

- ✓ » Tyro eCommerce Portal (MPGS Merchant Administrator): <https://-tyro.gateway.mastercard.com/ma/>
- » Merchant ID: TYRO\_CAID (eg. TYRO\_55900)
- » Operator ID: Administrator
- » Password: <password123>



The password will expire in 24 hours.

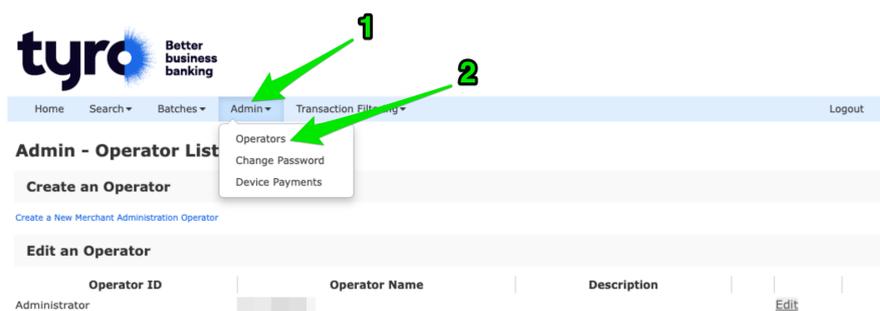
- Using three pieces of information in step 1, you log into the account.



The image shows the Tyro eCommerce login page. At the top is the Tyro logo and the text "Tyro eCommerce". Below this are three input fields: "Merchant ID", "Operator ID", and "Password". A blue "LOG IN" button is positioned below the password field. At the bottom left, there is a link for "Forgot Password".

 You will be prompted to reset the password.

- Navigate to the operators page by clicking **Admin** in the top menu, then clicking on **Operators**.



The screenshot shows the Tyro Admin interface. The top navigation bar includes "Home", "Search", "Batches", "Admin", "Transaction Filtering", and "Logout". A green arrow labeled "1" points to the "Admin" menu item. A dropdown menu is open under "Admin", with a green arrow labeled "2" pointing to the "Operators" option. Below the navigation bar, the page title is "Admin - Operator List". There are sections for "Create an Operator" and "Edit an Operator". A table lists operators with columns for "Operator ID", "Operator Name", and "Description". The first row shows "Administrator" with an "Edit" link.

4. Create a new Operator. Click on **Create a New Merchant Administration Operator**. Complete all required fields.

The screenshot shows the Tyro Admin interface for creating a new operator. The header includes the Tyro logo and navigation links: Home, Search, Batches, Admin, Transaction Filtering, and Logout. The main heading is "Admin - Operator Details". Below this is a section titled "Operator Details" containing the following fields:

- Merchant: ECOM\_TESTING
- Operator ID: Operator1
- Operator Name: Operator1
- Description: (empty)
- Password: (masked with dots) with a strength indicator showing "Strong" in green.
- Confirm Password: (masked with dots)
- Email Address: (empty)
- Locale: English (Australia)
- TimeZone: Australia/Sydney

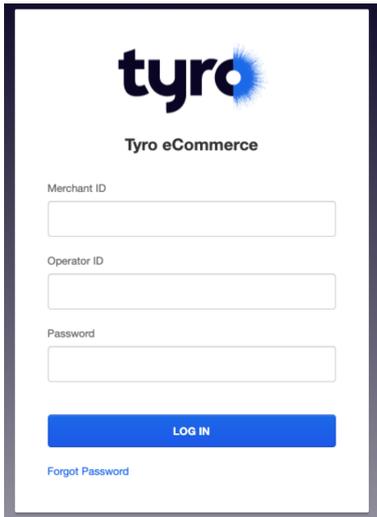
5. Assign the user rights. Ensure you assign **May Configure Integration Settings**. Once assigned, select **Submit**.

The screenshot shows the "General" permissions section of the operator configuration. It lists various permissions with checkboxes:

- View Report Pages
- Download Order Search Results
- Download Transaction and Payment Authentication Search Results
- Allow Software Download
- Allow Merchant Admin Documentation Download
- May Perform Risk Assessment Review
- May Bypass Risk Management
- May Configure Transaction Filtering
- May Configure Integration Settings**
- May Configure Email and Webhook Notifications
- May Maintain Tokens
- May View Dashboard

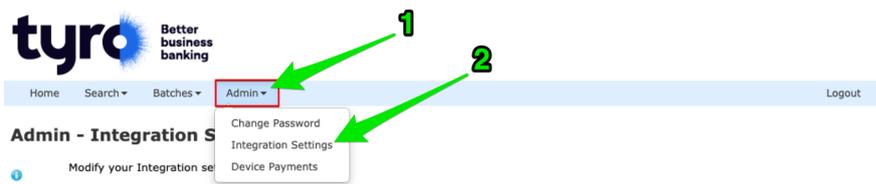
At the bottom, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a green border.

6. Using the newly created Operator user ID, log in to the [Merchant Administrator Portal](#).

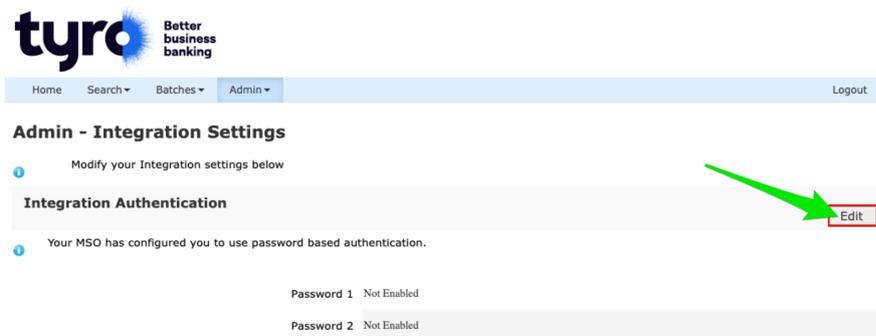


The image shows the Tyro eCommerce login page. At the top is the Tyro logo and the text "Tyro eCommerce". Below this are three input fields: "Merchant ID", "Operator ID", and "Password". A blue "LOG IN" button is positioned below the password field. At the bottom left, there is a link for "Forgot Password".

7. Navigate to **Integration Settings**. Using the top menu access **Admin**, then **Integration Settings**.



8. Access Integration Authentication. Click the **Edit** button on the right-hand side of the **Integration Authentication** section.



9. Generate an API Key by checking the box next to **Password 1**, then clicking **Generate New**. When complete, click **Submit**.

**tyro** Better business banking

Home Search Batches Admin Logout

### Admin - Integration Authentication Passwords

Modify your Integration Authentication Passwords below

Password 1 Enable Integration Access Via Password:  **Generate New**  
Generated On: 10/10/22 4:53 PM by Operator1

Password 2 Enable Integration Access Via Password:  **Generate New**

10. Copy and store the API Key ready for sending to the franchisee.

**tyro** Better business banking

Home Search Batches Admin Logout

### Admin - Integration Settings

Modify your Integration settings below

#### Integration Authentication

Your MSO has configured you to use password based authentication.

Password 1	<input type="text" value="1eeaf691e13560bf320ac7bb345bd36f7"/>
Password 2	Not Enabled

11. From the Payer Authentication drop down, select *Authentication API*. When complete, click **Submit**.

**Hosted Checkout**

Use this section to configure your Hosted Checkout Integration.  
This configuration option only applies if you are initiating the Hosted Checkout interaction using the WS API CREATE\_CHECKOUT\_SESSION request with version 54-62. Use this option to migrate from Hosted Checkout using the Legacy 3DS1 functionality to using the Authentication API functionality for payer authentication. See [this page](#) for details.

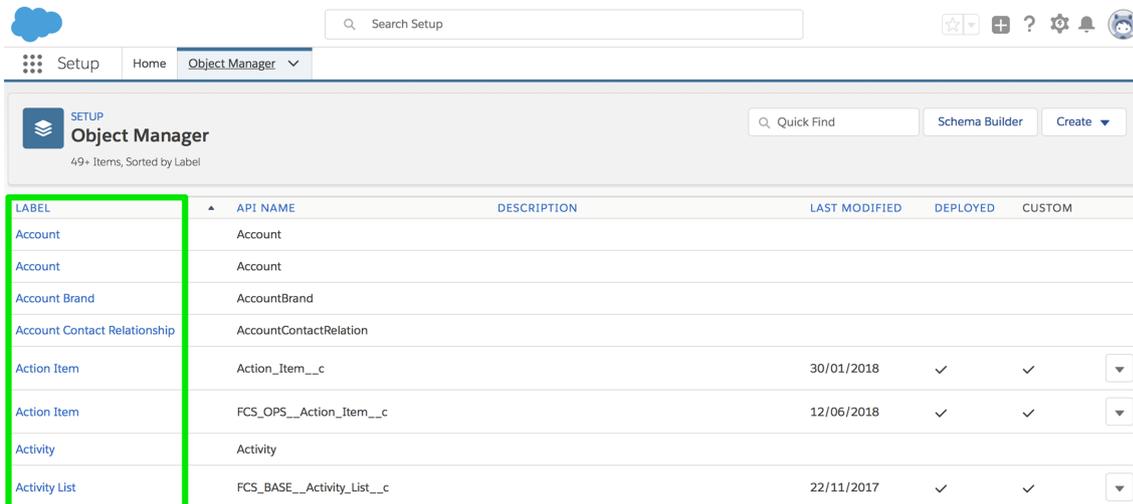
Payer Authentication:

# How to identify a Field API Name

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

## To determine Field API Names for custom fields

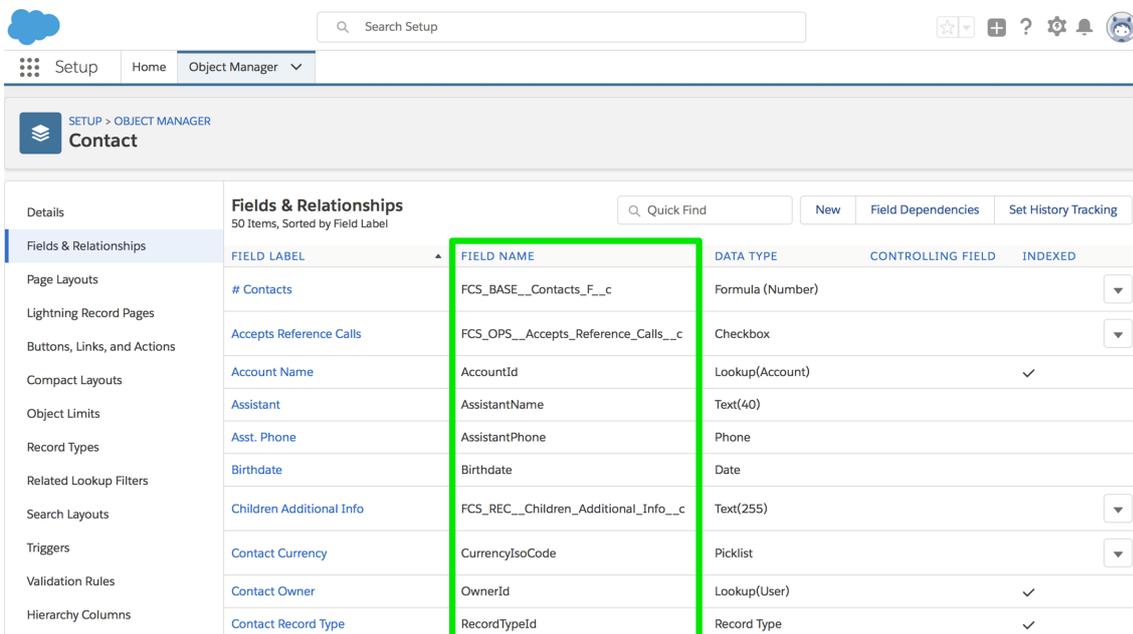
1. Go to **Setup**, and search for *Object Manager*.
2. From **Object Manager**, select the *Label* of one of the records.



The screenshot shows the Salesforce Object Manager interface. The 'Object Manager' menu is selected, and a list of objects is displayed. The 'LABEL' column is highlighted with a green box. The table below shows the data for the objects listed.

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Account	Account				
Account	Account				
Account Brand	AccountBrand				
Account Contact Relationship	AccountContactRelation				
Action Item	Action_Item__c		30/01/2018	✓	✓
Action Item	FCS_OPS__Action_Item__c		12/06/2018	✓	✓
Activity	Activity				
Activity List	FCS_BASE__Activity_List__c		22/11/2017	✓	✓

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



The screenshot shows the Salesforce Fields & Relationships interface for the 'Contact' object. The 'Fields & Relationships' menu is selected, and a list of fields is displayed. The 'FIELD NAME' column is highlighted with a green box. The table below shows the data for the fields listed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
# Contacts	FCS_BASE__Contacts_F__c	Formula (Number)		
Accepts Reference Calls	FCS_OPS__Accepts_Reference_Calls__c	Checkbox		
Account Name	AccountId	Lookup(Account)		✓
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Children Additional Info	FCS_REC__Children_Additional_Info__c	Text(255)		
Contact Currency	CurrencyIsoCode	Picklist		
Contact Owner	OwnerId	Lookup(User)		✓
Contact Record Type	RecordTypeId	Record Type		✓

# How to identify record ids

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

## To obtain a record ID

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

# How to import, export and update data in Salesforce

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

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

## To download Data Loader from Salesforce

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

## To learn how to use Data Loader

- » Refer to [Salesforce documentation on Data Loader](#).

# How to map addresses to Google Maps

Salesforce integrates with Google Maps by exchanging street address information. For implementations in countries outside Australia, it is necessary to set up a mapping between Salesforce and the local addressing format expected by Google Maps.



This is an example of an address map for the United Kingdom.

The screenshot shows the Salesforce 'Custom Settings' page for 'AddressMapping Edit'. The page title is 'AddressMapping Edit' and it includes a sub-header 'AddressMapping Information'. The form contains the following fields:

Field Label	Value
Name	United Kingdom
Country	country
Postal Code	postal_code
State/Gov Area	administrative_area_level_2
Street Name	route
Street Number	street_number    premise
Suburb/Town	postal_town    locality
Unit/House Number	subpremise

Buttons: Save, Save & New, Cancel

## To configure an address map

1. Go to **Setup**.
2. Search for *custom settings*.
3. Beside the **AddressMapping** item, press **Manage**.
4. **Edit** an existing **AddressMapping** or create a **New** one.

# How to migrate customer data to a new franchise profile account

When a previously operated franchise is being transitioned to a new franchisee, you may be asked to migrate the customers, or a subset of the customers, to the new Franchise Profile Account.

## To migrate customer data

1. Use the Salesforce Data Loader application to achieve the following steps. See “How to import, export and update data in Salesforce” on page 241.
2. You will need to export
  - » Individual accounts attached to the franchise
  - » Business accounts attached to the franchise
  - » Contacts attached to the business accounts
3. You will need to remap the id values to match the new Franchise Profile Account.
4. You will then need to import the modified data in order for it to be visible from the new franchisee’s Franchise Profile Account.

# How to work with accounting sequences

A franchisee may ask you to change the quote, invoice or credit note numbers being generated from their account. They may want to:

- » start at a particular quote or invoice number
- » change the quote, invoice or credit note prefix
- » change the number of leading zeroes or padding fields in the quote or invoice sequence
- » ensure that multiple franchise profile accounts share the same accounting sequence

All of this is controlled through use of an accounting sequence.



## Multiple Franchise Profile Accounts syncing with Xero

When multiple franchise profile accounts are being synced to a single Xero account, you will want to ensure the invoice and credit note sequences are distinct within Xero. You will generally need to set the starting numbers and ensure the accounting sequence is shared between all franchise profile accounts that sync to the Xero account.

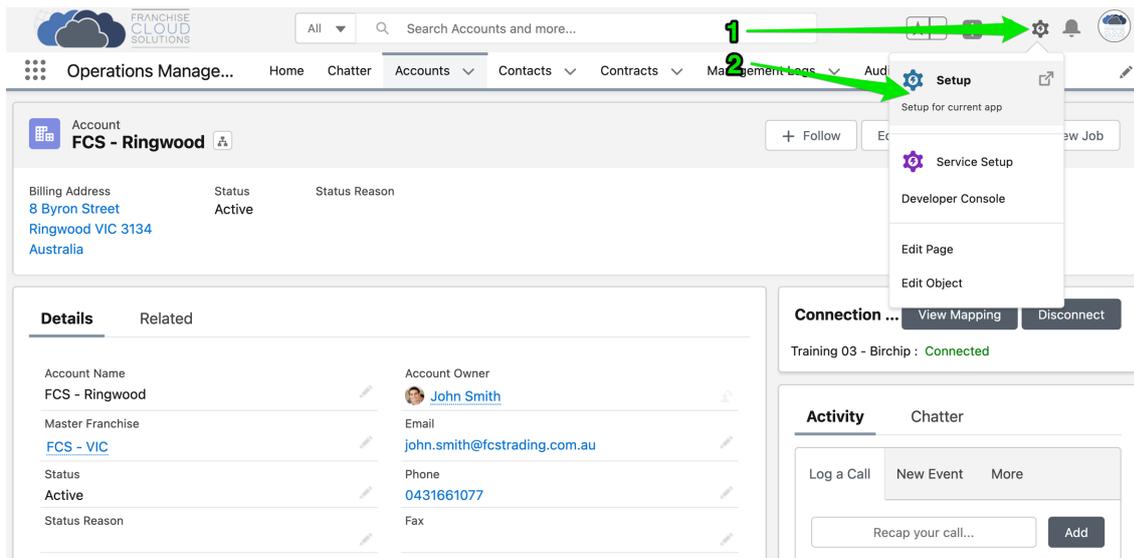


## Setting organization-wide custom formats

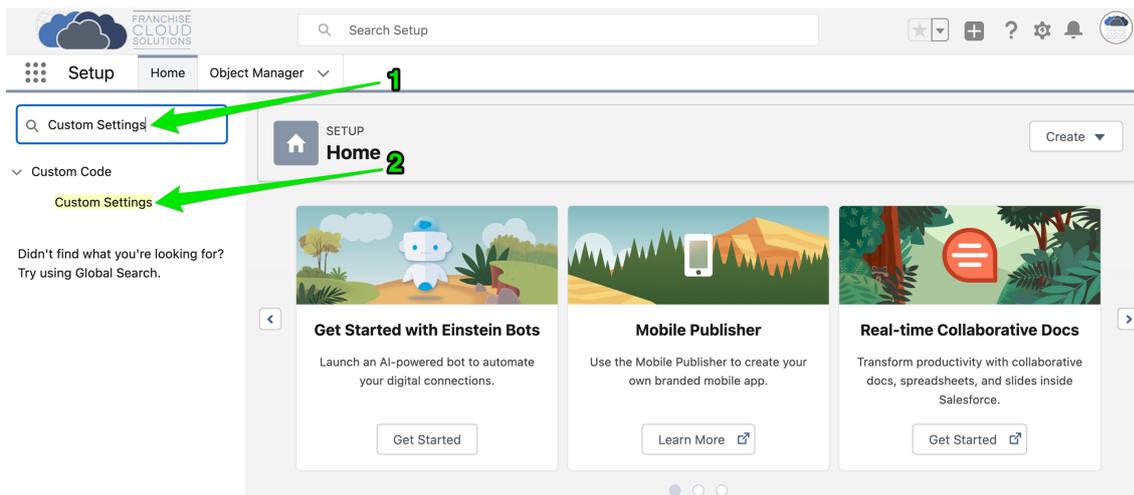
Operations Management uses INV-000NN, QN-000NN, and CN-000NN by default. If you'd like your invoices to use a different convention, you can set an org-wide default.

## To locate a franchise profile account's accounting sequence

1. From the **Setup** menu select **Setup**.



2. Within **Quick Find** search for *Custom Settings*, then select the **Custom Settings** item.



- In the Custom Settings list, locate the Accounting Sequence label and select its Manage link.

The screenshot shows the Salesforce Custom Settings interface. The left sidebar contains navigation options: Setup, Home, Object Manager, and Custom Settings. The main content area is titled 'Custom Settings' and includes a search bar, a 'Get Usage' button, and a table of settings. A green arrow points to the 'Manage' link for the 'Accounting Sequence' setting.

Use Custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View:  [Create New View](#)

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
<a href="#">Manage</a>	<a href="#">Accounting Sequence</a>	Public	List	FCS_OPS		348	34	11832
<a href="#">Manage</a>	<a href="#">Address Mapping</a>	Public	List	FCS_BASE	Contains Google API address component mapping for job addresses	710	0	0
<a href="#">Manage</a>	<a href="#">Document Template Setting</a>	Public	Hierarchy	FCS_OPS		1,030	1	1030
<a href="#">Manage</a>	<a href="#">Email Template Setting</a>	Public	List	FCS_OPS		450	3	1350
	<a href="#">IL Points</a>	Public	Hierarchy	ilms	Impact LMS Points	190	1	190
	<a href="#">Impact LMS Fonts</a>	Public	List	ilms	Impact LMS Fonts	1,120	0	0
	<a href="#">Impact LMS Points</a>	Public	List	ilms	Impact LMS Points	118	0	0
	<a href="#">Impact LMS Settings</a>	Public	List	ilms	Impact LMS Settings - Icon Folder, Image Folder, Editor GroupId ... and so on.	355	8	2840
	<a href="#">Impact LMS Styles</a>	Public	List	ilms	All Froala Editor Custom Styles will go into this.	355	0	0
<a href="#">Manage</a>	<a href="#">LMS Settings</a>	Public	Hierarchy	redwing	Settings used by the LMS Core app	3,972	1	3972
<a href="#">Del</a>   <a href="#">Manage</a>	<a href="#">Nextdoc Connection</a>	Public	Hierarchy	nxd	Controls URL and encryption features for callouts to Nextdoc APIs	610	1	610
<a href="#">Manage</a>	<a href="#">Nintex DocGen Settings</a>	Public	Hierarchy	Loop		1,435	1	1435
<a href="#">Manage</a>	<a href="#">Reminder Setting</a>	Public	List	FCS_BASE	The settings related to reminders.	711	0	0
<a href="#">Manage</a>	<a href="#">Report</a>	Public	Hierarchy	FCS_OPS	Holds the salesforce Id of the report	168	0	0

#### 4. You have found the list of accounting sequences.

The screenshot shows the 'Custom Settings' page for 'Accounting Sequence'. It includes a search bar, navigation tabs (Setup, Home, Object Manager), and a sidebar with 'Custom Settings' selected. The main content area has a 'New' button and a table of sequences.

**Accounting Sequence**

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: [All Sequences](#) | [Edit](#) | [Create New View](#)

Action	Name ↑	Profile Name	Created Date	Next Quote Number	Next Invoice Number	Next Credit Note Number	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000EeLLbQAN	FCS WA	19/07/2018	1	34		25/07/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000EeLLRQA3	The Alternative Board - NSW	5/10/2017	1	6	1	19/09/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000EybZ5QAJ	Tile Rescue Balmain	18/04/2018	4	3		5/06/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000Eyw8aQAE	FCS VIC	5/07/2018	1	15		10/11/2021
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000Eyw8bQAE	FCS QLD	5/07/2018	1	1		18/06/2019
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000Eyw8LQAV	FCS NSW	6/10/2017	2	211	1	8/08/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000EywUJ2QAN	FCS - Bondi	5/10/2017	4	6	1	20/06/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000EywVBOA3	FCS Maroubra	2/05/2018	1	2		2/05/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000EywFIQA3	FCS Kingsford	2/05/2018	3	3		3/05/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000EywYhTQAV	FCS Bondi Beach	29/11/2017	18	25	1	5/08/2019
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000EywYwQAN	FCS Coogee	2/05/2018	2	2		2/05/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000hvG4dQAE	Tile Rescue Lilydale	13/05/2018	7	9		16/11/2020
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000iAvZuQAE	FCS SA	5/07/2018	1	1		19/11/2019
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000iubSSQA2	Franchise Adelaide CBD	24/05/2018	4	3		25/05/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000iunVyQAI	FCS - Montrose	4/11/2020	3	3		23/07/2021
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000iLEOnsQAH	Territory - Kingsgrove	29/11/2017	2	2	1	29/11/2017
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000oX0H0QAK	FCS Mandurah	23/07/2018	2	2		23/07/2018
<a href="#">Edit</a>   <a href="#">Del</a>	0017F00000oX0VgQAK	FCS Rockingham	23/07/2018	2	2		23/07/2018

 If you can only see the sequence Name and not the Profile Name, you will want to press the **Create New View** link, name the view and then add **Profile Name** to **Selected Fields**.

#### 5. Using the Profile Name, identify the franchise’s accounting sequence. To edit the account sequence, press the Edit link.

## To set a starting number for a quote, invoice or credit note sequence

- » Edit the quote, invoice or credit note next numbers, then press **Save**.

### Accounting Sequence Edit

[Help for this Page](#)

Provide values for the fields you created. This data is cached with the application.

**Edit Accounting Sequence** Save Save & New Cancel

**Accounting Sequence Information** I = Required Information

Name: FCS Ringwood

Credit Note Number Padding:

Credit Note Prefix: CR-

Invoice Number Padding: 5

Invoice Prefix: INV-

Next Credit Note Number: 1

Next Invoice Number: 43

Next Quote Number: 91

Profile Name: FCS - Ringwood

Quote Number Padding: 5

Quote Prefix: QN-

## To format a quote, invoice or credit note sequence

- » Edit the quote, invoice or credit note prefix and padding fields, then press **Save**.

### Accounting Sequence Edit

[Help for this Page](#)

Provide values for the fields you created. This data is cached with the application.

**Edit Accounting Sequence** Save Save & New Cancel

**Accounting Sequence Information** I = Required Information

Name: FCS Ringwood

Credit Note Number Padding:

Credit Note Prefix: CR-

Invoice Number Padding: 5

Invoice Prefix: INV-

Next Credit Note Number: 1

Next Invoice Number: 43

Next Quote Number: 91

Profile Name: FCS - Ringwood

Quote Number Padding: 5

Quote Prefix: QN-

## To share an accounting sequence between multiple franchise profile accounts

1. From the accounting sequence, copy the unique accounting sequence Name.

### Accounting Sequence Edit

[Help for this Page](#)

Provide values for the fields you created. This data is cached with the application.

**Edit Accounting Sequence** [Save] [Save & New] [Cancel]

Accounting Sequence Information ⓘ = Required Information

Name: **FCS Ringwood** ⓘ

Credit Note Number Padding: [ ]

Credit Note Prefix: CR-

Invoice Number Padding: 5

Invoice Prefix: INV-

Next Credit Note Number: 1

Next Invoice Number: 43

Next Quote Number: 91

Profile Name: FCS - Ringwood

Quote Number Padding: 5

Quote Prefix: QN-

2. Now paste that unique code into the Accounting Sequence Name field of each additional Franchise Profile Account that needs to use the accounting sequence, then press Save.

Account **FCS - Ringwood North** [Follow] [Edit] [Sharing] [Create New Job]

Quote & Invoice Information

Payment Terms: On Completion

Accounting Sequence Name: **FCS Ringwood** ⓘ

Default Tax Rate: 10.00%

Default Markup %: 25.00%

Default Hourly Rate: 45.00

Payment Method Information [Cancel] [Save]

Activities: Meetin... 1:47 PM | 23/11/2018, Inv... 12:01 PM | 23/11/2018, Field A... 11:21 AM | 16/11/2018



Every Franchise Profile Account (FPA) that syncs to a common Xero account should share the same accounting sequence. Ensure you make each subsequent FPA share the accounting sequence of the first FPA.

## To set an organization-wide standard for quotes, invoices or credit notes

- » Create an accounting sequence named `Org Default`, then press **Save**.

### Accounting Sequence Edit

[Help for this Page](#)

Provide values for the fields you created. This data is cached with the application.

**Edit Accounting Sequence** Save Save & New Cancel

**Accounting Sequence Information** ! = Required Information

Name	<input type="text" value="Org Default"/>
Credit Note Number Padding	<input type="text" value="5"/>
Credit Note Prefix	<input type="text" value="CN-"/>
Invoice Number Padding	<input type="text" value="5"/>
Invoice Prefix	<input type="text" value="INV-"/>
Next Credit Note Number	<input type="text" value="1"/>
Next Invoice Number	<input type="text" value="1"/>
Next Quote Number	<input type="text" value="1"/>
Profile Name	<input type="text"/>
Quote Number Padding	<input type="text" value="5"/>
Quote Prefix	<input type="text" value="QN-"/>

When each new franchise profile account is added, your new accounting sequence named `Org Default` will be cloned, together with any of the starting numbers, prefixes and padding settings you have specified.

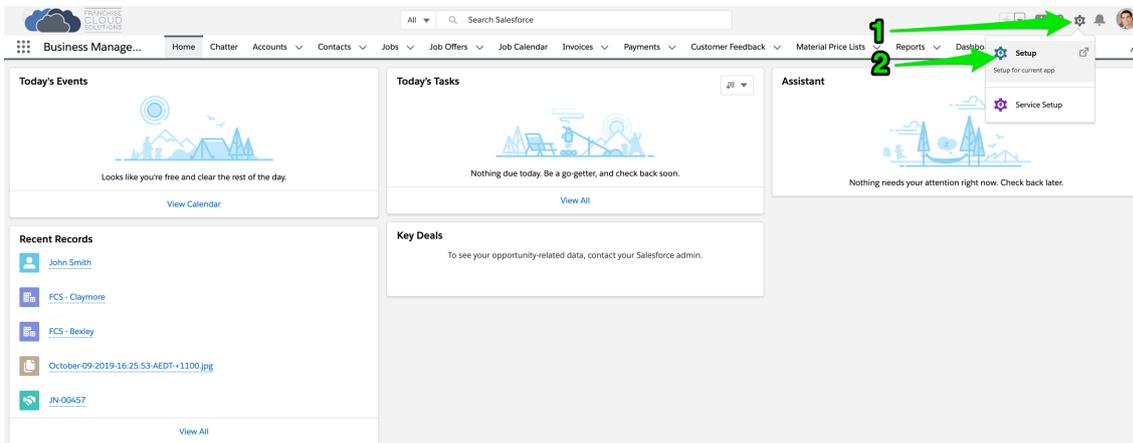
# How to upgrade Franchise OPS

Recruitment, Business Management, Operations Management and SMS are apps delivered by Franchise Cloud Solutions that run on Salesforce. These apps are delivered to your Salesforce org by way of bundles that Salesforce call “packages”. These apps are delivered using the following packages:

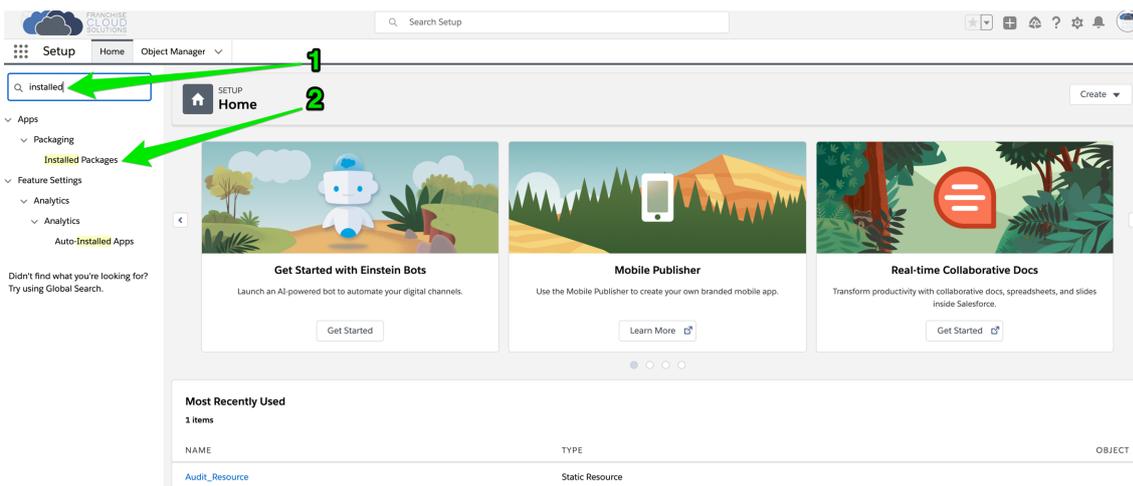
- » FranchiseBase
- » Recruitment
- » FranchiseOps
- » SMS

To check which version of the package is currently installed

1. As system administrator, choose Setup.



2. Using the search box, search for *installed packages*.



3. Now click the Installed Packages link. Salesforce will provide you a listing of all packages installed. You can check the versions for each of the above packages.



If the installed package is a lower version than the current release, you may wish to upgrade the version.

### To upgrade an earlier package to a later version



You will need to be given a package link. If you have a package link and are a system administrator, you may be able to upgrade an earlier package to a more recent package. Note that some versions of **Recruitment** or **FranchiseOps** require an updated version of **FranchiseBase**.

1. A package link is delivered to you as a partial URL. To initiate the upgrade, you will need to prepare the URL for an upgrade.



#### Prepare the URL for an upgrade

When you first log into Salesforce, note your organization's URL. It will be something like this:

`https://nfctril01-dev-ed.lightning.force.com/lightning/page/home`

From this, you will want to isolate just the Base URL:

`https://nfctril01-dev-ed.lightning.force.com`

With the Base URL in mind, your partial URL will look something like this:

`/packaging/installPackage.apexp?p0=04t7F0000054p2J`

What you need to do is to put together the Base URL with the partial URL:

`https://nfctril01-dev-ed.-`

`lightning.force.com/packaging/installPackage.apexp?p0=04t7F0000054p4J`

Once you have put them together, now you're ready to begin the upgrade.

2. With the URL prepared as described in the above example, paste the URL into your browser's address bar then press Enter.

3. When presented with the choice, choose **Install for Specific Profiles**.



## Upgrade FranchiseOps

By Franchise Cloud Solutions

---

**i** An earlier version is installed. It can be upgraded while preserving the existing data.  
Installed: FranchiseOperations (1.204)    New Version: FranchiseOperations (1.226)



Install for Admins Only



Install for All Users



Install for Specific Profiles...

**Upgrade**    Cancel

4. On choosing **Install for Specific Profiles**, you will be asked to provide a list of profiles for upgrade. Provide **No Access** to all profiles other than the profiles shown below. Ensure you choose the profiles shown in the image below.

Identity User	No Access
Minimum Access - Salesforce	No Access
OPS Administrator	OPS Administrator
OPS Compliance Manager	OPS Compliance Manager
OPS Field Manager	OPS Field Manager
OPS Finance Manager	OPS Finance Manager
OPS Franchise Employee	OPS Franchise Employee
OPS Franchise Owner	OPS Franchise Owner
OPS Head Office Manager	OPS Head Office Manager
OPS Operations Manager	OPS Operations Manager
Overage Customer Portal Manager Custom	No Access
Overage Customer Portal Manager Standard	No Access
Overage High Volume Customer Portal User	No Access
Standard User	No Access

5. With the correct profiles selected, press the **Upgrade** button.
6. If asked to **Approve Third-Party Access** for `api.addressify.com.au`, then approve the access.
7. The system will take some time to install. Press the **Done** button. Salesforce will email you when the upgrade is complete.

# CHAPTER 14

## Working with Reports

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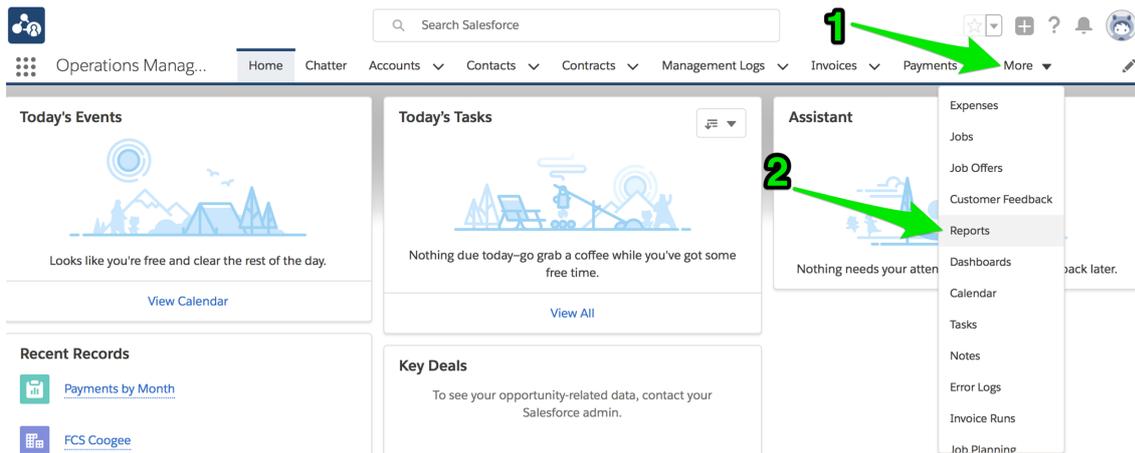
# Understanding reports

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.

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

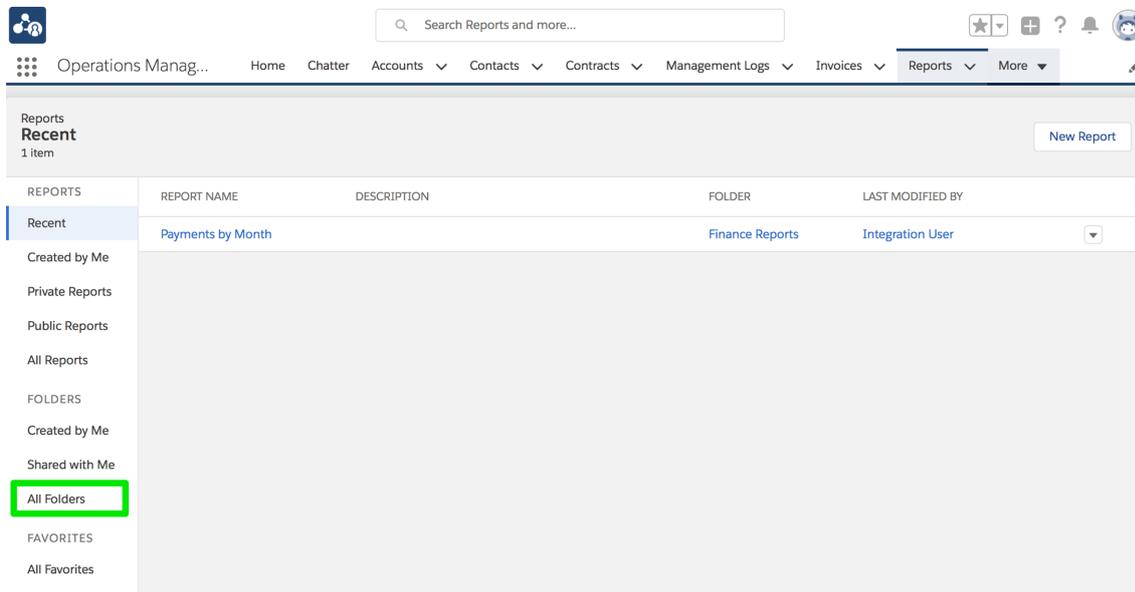
## To discover available reports

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



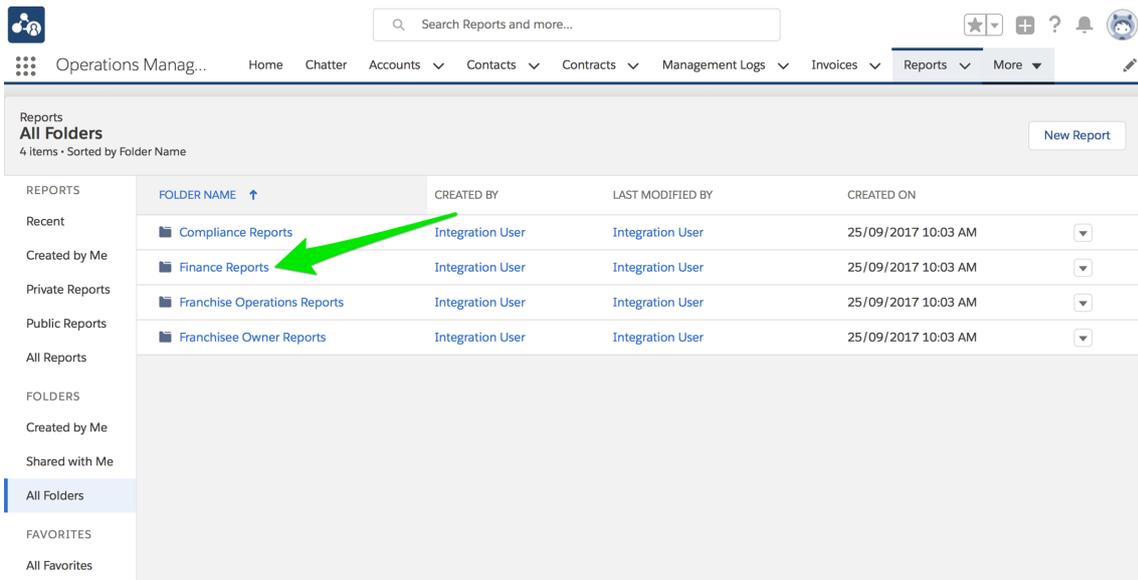
The recent reports folder appears. If you have yet to use a report, this will be blank.

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



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

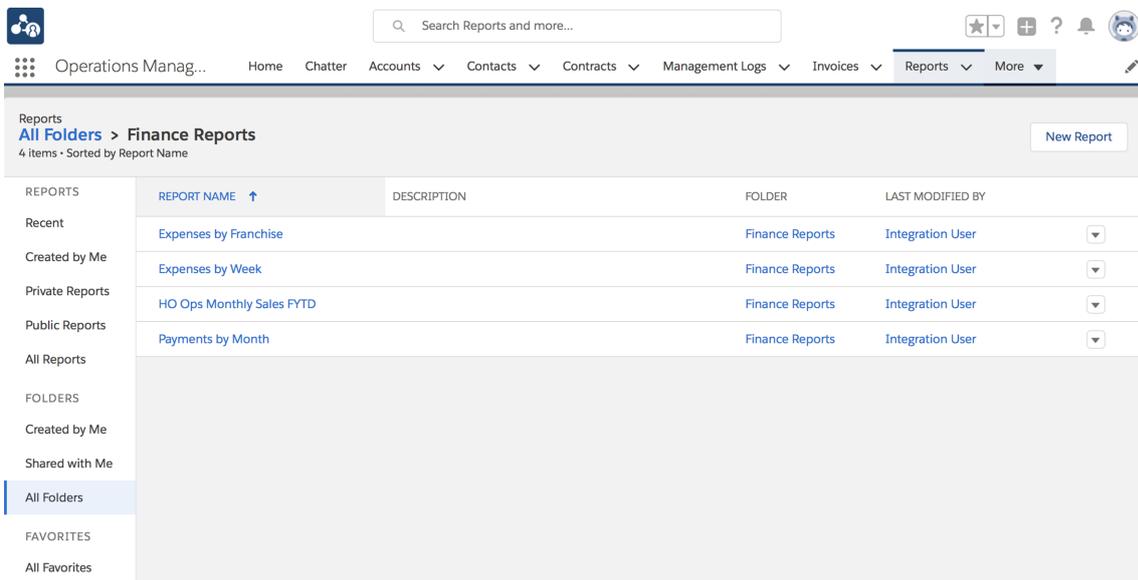
### 3. Select any one of the report folders.



The screenshot shows the 'Reports' section of the Operations Manager interface. The page title is 'Reports All Folders' with a subtitle '4 items • Sorted by Folder Name'. A search bar is at the top with the text 'Search Reports and more...'. The navigation menu includes 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Reports', and 'More'. A 'New Report' button is in the top right. The main content area is a table with the following columns: 'REPORTS', 'FOLDER NAME', 'CREATED BY', 'LAST MODIFIED BY', and 'CREATED ON'. The table lists four folders: 'Compliance Reports', 'Finance Reports', 'Franchise Operations Reports', and 'Franchisee Owner Reports'. A green arrow points to the 'Finance Reports' folder. The left sidebar shows navigation options: 'All Folders', 'FAVORITES', and 'All Favorites'.

REPORTS	FOLDER NAME	CREATED BY	LAST MODIFIED BY	CREATED ON
Recent	Compliance Reports	Integration User	Integration User	25/09/2017 10:03 AM
Created by Me	Finance Reports	Integration User	Integration User	25/09/2017 10:03 AM
Private Reports	Franchise Operations Reports	Integration User	Integration User	25/09/2017 10:03 AM
Public Reports	Franchisee Owner Reports	Integration User	Integration User	25/09/2017 10:03 AM

Now you can see the reports within that folder.



The screenshot shows the 'Reports' section of the Operations Manager interface, specifically the 'Finance Reports' folder. The page title is 'Reports All Folders > Finance Reports' with a subtitle '4 items • Sorted by Report Name'. A search bar is at the top with the text 'Search Reports and more...'. The navigation menu includes 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Reports', and 'More'. A 'New Report' button is in the top right. The main content area is a table with the following columns: 'REPORTS', 'REPORT NAME', 'DESCRIPTION', 'FOLDER', and 'LAST MODIFIED BY'. The table lists four reports: 'Expenses by Franchise', 'Expenses by Week', 'HO Ops Monthly Sales FYTD', and 'Payments by Month'. The left sidebar shows navigation options: 'All Folders', 'FAVORITES', and 'All Favorites'.

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY
Recent	Expenses by Franchise		Finance Reports	Integration User
Created by Me	Expenses by Week		Finance Reports	Integration User
Private Reports	HO Ops Monthly Sales FYTD		Finance Reports	Integration User
Public Reports	Payments by Month		Finance Reports	Integration User

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

Operations Manag... Home Chatter Accounts Contacts Contracts Management Logs Invoices Reports More

Search Reports and more...

Reports Recent 4 items New Report

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY
Recent	Payments by Month		Finance Reports	Integration User
Created by Me	HO Ops Monthly Sales FYTD		Finance Reports	Integration User
Private Reports	Expenses by Week		Finance Reports	Integration User
Public Reports	Expenses by Franchise		Finance Reports	Integration User
All Reports				
FOLDERS				
Created by Me				
Shared with Me				
All Folders				
FAVORITES				
All Favorites				

# Standard reports

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

## Compliance reports



Ships with the Operations Management application.

Report Name	Description
Activated by Month	A summary of contracts organized by activation month, together with key details that characterize contract status.
Activated Contracts by Type	A summary of contracts organized by type, together with key details that characterize contract status.
Compliance - 14 Days from Issue	Listing all contract documents whose signing date is less than 14 days after documents issued vs those contracts whose signing date is greater than 14 days after documents issued.
Deactivated by Month	A summary of contracts organized by deactivation month, together with key details that characterize contract status.
Deactivation in Progress	A summary of contracts with the status <i>Deactivation in Progress</i> , together with key details that characterize contract status.
Deposit Due	A list of franchise profile accounts owing money on the initial deposit.
Open Contracts by Franchise	An historical listing of contracts by franchisee, with a histogram of the number of contracts issued to each franchisee.
Open Contracts by Type	A histogram showing contract start date, secondarily grouped by contract type.
Signed Agreements by Type	The current contracts whose <i>Status</i> is <i>Signed</i> .
Upcoming renewals - Next 3 Months	Contracts due for renewal in the next three months.
Upcoming renewals - Next 6 Months	Contracts due for renewal in the next six months.

## Finance reports



Ships with the Finance Management application.

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

## Franchise Operations Reports



Ships with the Operations Management application.

Report Name	Description
Job Request Conversion	Job requests categorized by <i>Converted</i> and <i>Unconverted</i> Status.
Job Requests in and out	Number of Job Offers by month in <i>Owned</i> and <i>Unowned</i> Territories.
Pending Quotes & Work in Progress	Summary of Job Plans that are pending a decision from the customer.
Quote Conversion %	Number and Value of Jobs that are <i>Converted</i> vs. those that are <i>Unconverted</i> .

## Franchise Owner Reports



Ships with the Business Management application.

Report Name	Description
Actual Hours v Target	Count of job offers by week.
Client Growth by Type	New accounts listed by month.
Gross Profit Monthly	Gross profit by month.
Gross Profit Weekly	Gross profit by week.
Invoice Status Report	Enable periodic reconciliation with external financial system.
Job Offers Summary	Count of jobs in each status by created date.
Job Request Conversion Last 90 Days	Converted leads vs job count in the last ninety days.
Job Size Invoiced	Count and sum of actual hours aggregated by job value.
Job Size Profit	Profit aggregated by job size.
Job Size Quoted	Count and sum of quoted hours aggregated by job value.
Job Source Summary	Count of jobs by month.
Job Source v Profit	Profit grouped by job source.
Job Status ALL OPEN	Count of jobs by status.
Job Status Last 90 Days	Jobs by status in the last ninety days.
Open Invoices by Age	Invoice numbers by account by age.
Open Invoices by Customer Name	Invoice numbers by account name.
Planned v Actual COGS	Estimated cost of goods sold (COGS) value vs actual COGS value.
Planned v Actual Hours	Estimated hours vs actual hours by month.

Report Name	Description
Quote Conversion - Last 90 Days	Job count and dollar value as a percentage of quotes issued in the last 90 days.
Quote Conversion by Job Size < \$2,000	Job count and dollar value as a percentage of quotes issued where job size is less than \$2,000.
Quote Conversion by Job Size > \$2,000	Job count and dollar value as a percentage of quotes issued where job size is greater than \$2,000.

## Head Office Reports



Ships with the Operations Management application.

Report Name	Description
Active Territories by State	Owned Territories by State.
All Jobs by State & Source	Listing of jobs, statuses, locations and owners by state and source.
All Jobs Last Week ESB	Listing of jobs, sources, statuses, locations and owners along the Eastern Sea Board of Australia.
Ceasing Franchisees	Franchisees whose contracts are in the process of being deactivated.
Job Offer Leaderboard by State Last Week	Listing of Job Offers by Franchisee and State in the last seven days.
Job Offers Last Week ESB	Listing of Job Offers by State in the last seven days along the Eastern Sea Board of Australia.
Jobs Historical Trends	Job details grouped by Period and State.
Self Generated Work Last Week	Jobs that did not come from the website or call center in the last seven days.
Territory Only by Billing State	Territories listed by billing state.
Zero Job Offers by State	Listing of franchises receiving no Job Offers within the last seven days.

## SMS Management Reports



Ships with the SMS Management option.

Report Name	Description
Journey Actions with Participant Actions	Completed vs Queued Participant Actions by Journey Action
Journeys with Actions	Journeys with at least one Journey Participant
Journeys with Participants	Count of Journey Action Names by Type, ordered by Journey Action Sequence.

## 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.

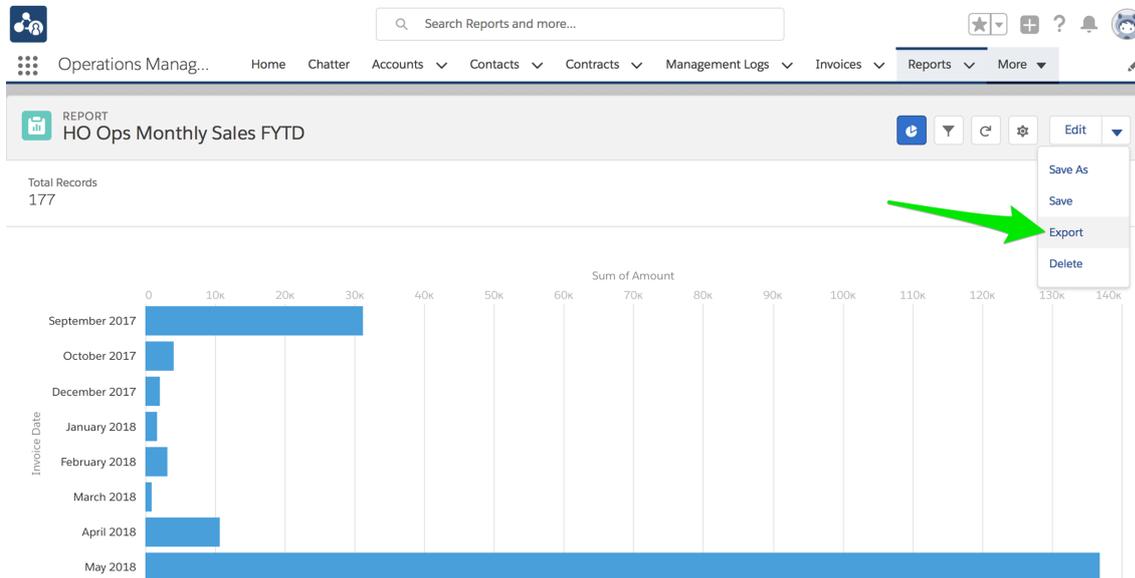
Report Name	Description
Envelopes by Sender this Month	Total envelopes sent this month by sender.
Envelopes by Sender this Quarter	Total envelopes sent this quarter by sender.
Envelopes by Sender YTD	Total envelopes sent this year to date by sender.
In Progress Envelopes	Envelopes sent and not voided, 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 export a report

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

## To export report results

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



The Export dialog box appears.

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

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)

CancelExport



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 265.
2. Print it using Excel.



# CHAPTER 15

## 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

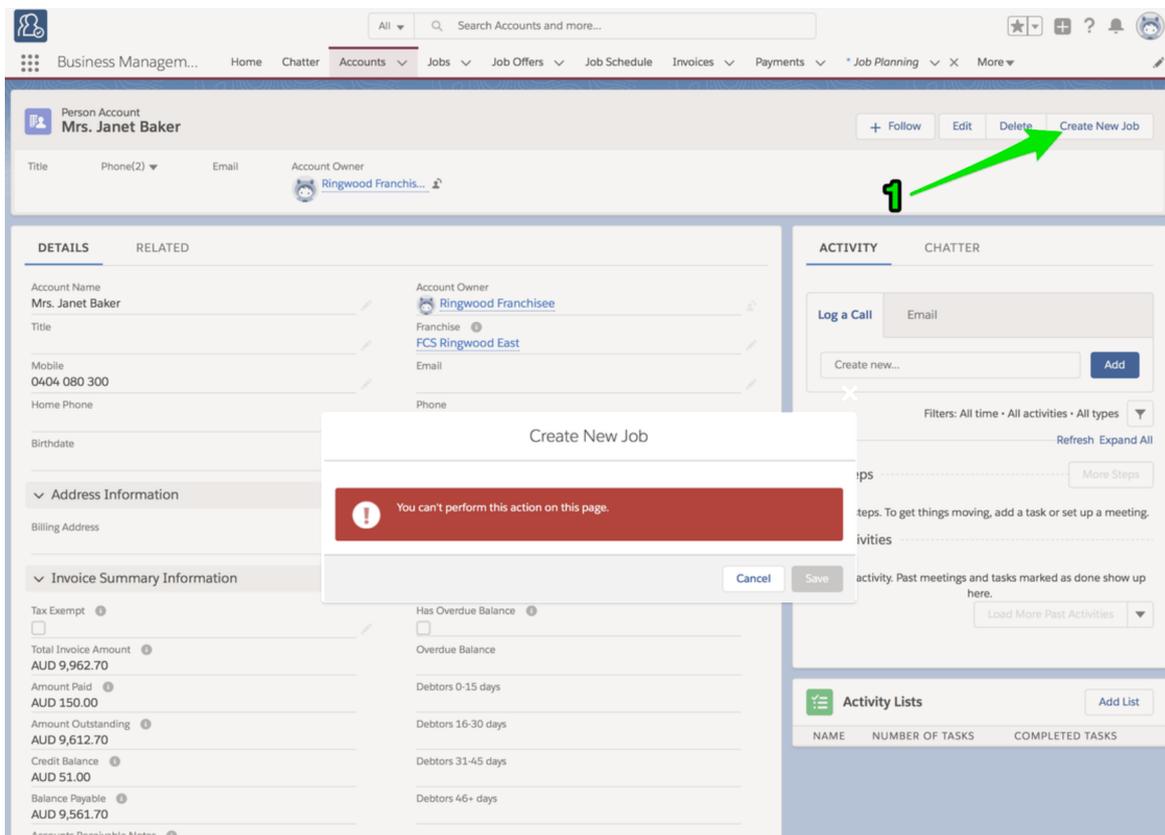
Cannot create new job from a customer's Account page.

*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 error path: 'H.validateSelection()@https://fcsopsgoldenut-dev-ed.lightning.force.com/components/lightning/dualListbox.js:2:17398' and 'H.getValidity()@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

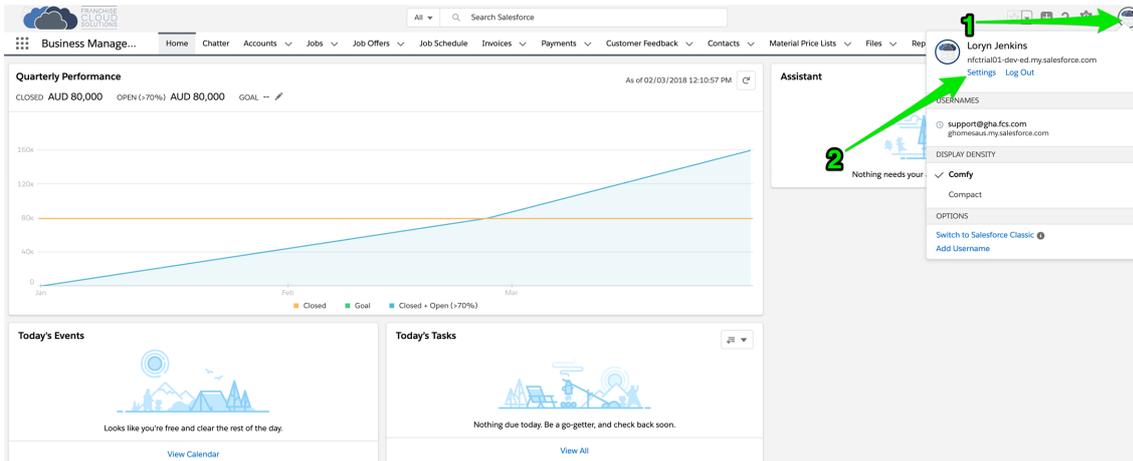
- » Who affected: All franchisees, Users of Job Calendar.
- » Visibility: 40 times per month per franchisee.
- » Block: None.

# Granting Account Login Access

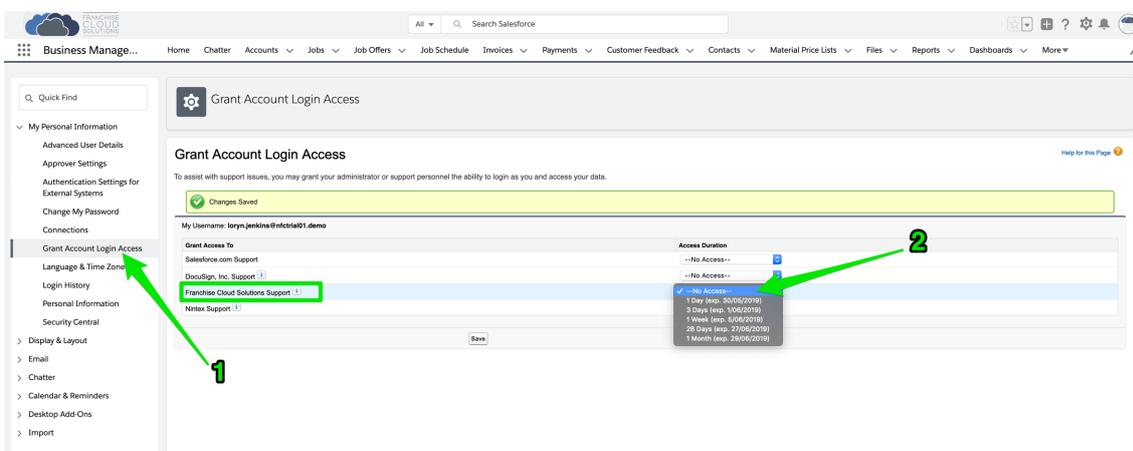
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

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 contains 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.