FRANCHISE CLOUD SOLUTIONS

Operations Management
Administration Guide

version 1.25

FranchiseOps version 1.198-1.306

Franchise Cloud Solutions

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

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CHAPTER 1

Getting Started

Introduction

Franchise 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

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

Setting up the master franchise profile account configuration set

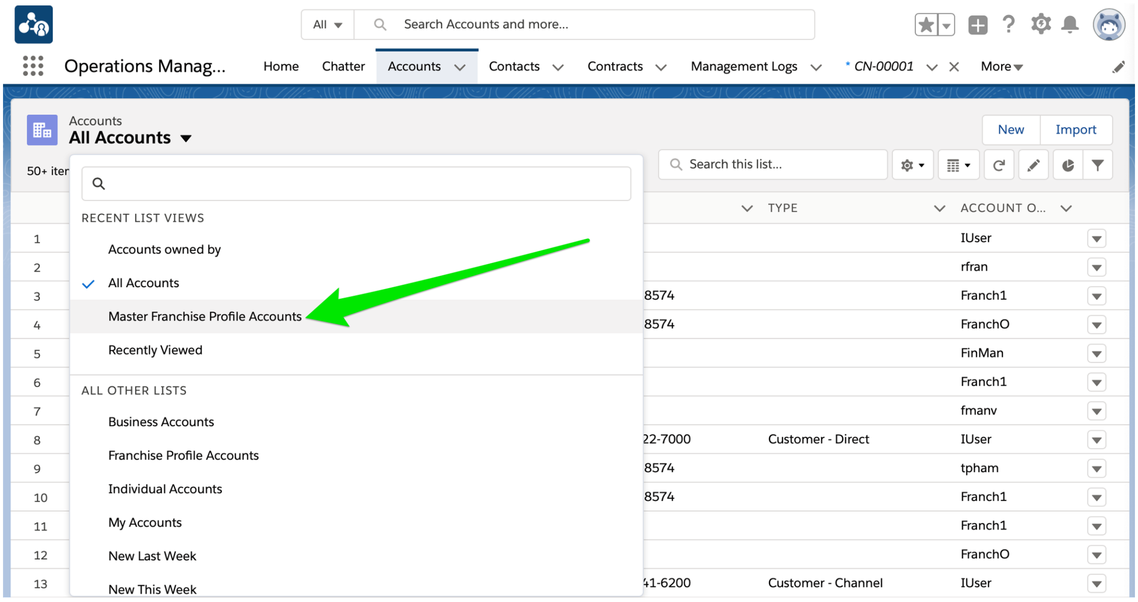
There are a wide range of behaviors within Operations Management that can be configured for each Master Franchise Profile Account. Multiple Master Franchise Profile Accounts can share Configuration Sets, thus displaying uniform behavior. They can also be configured with separate Configuration Sets to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

Configuration Sets control behaviors across the following areas

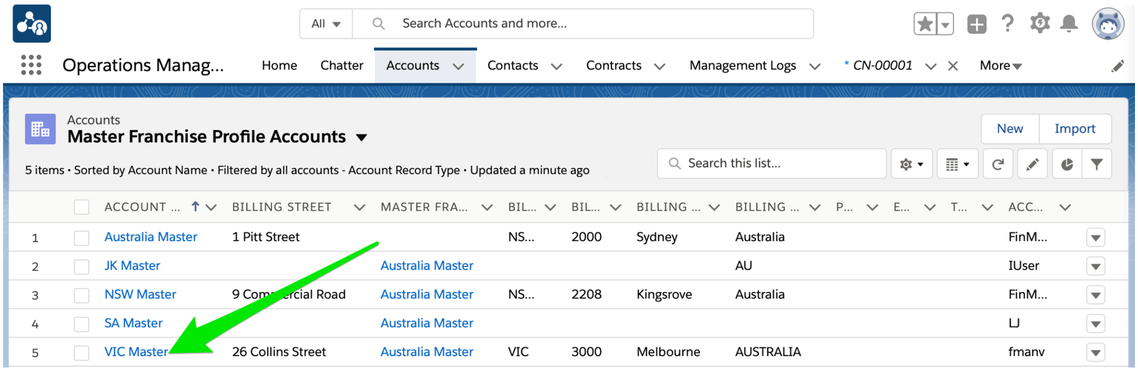
- Sequence numbering
- Survey frequency
- Escalation settings
- Contract expiry notification
- SMS configuration for automated job allocation messages
- Job allocation settings
- Xero integration

To locate the Configuration Set for a Master Franchise Profile Account

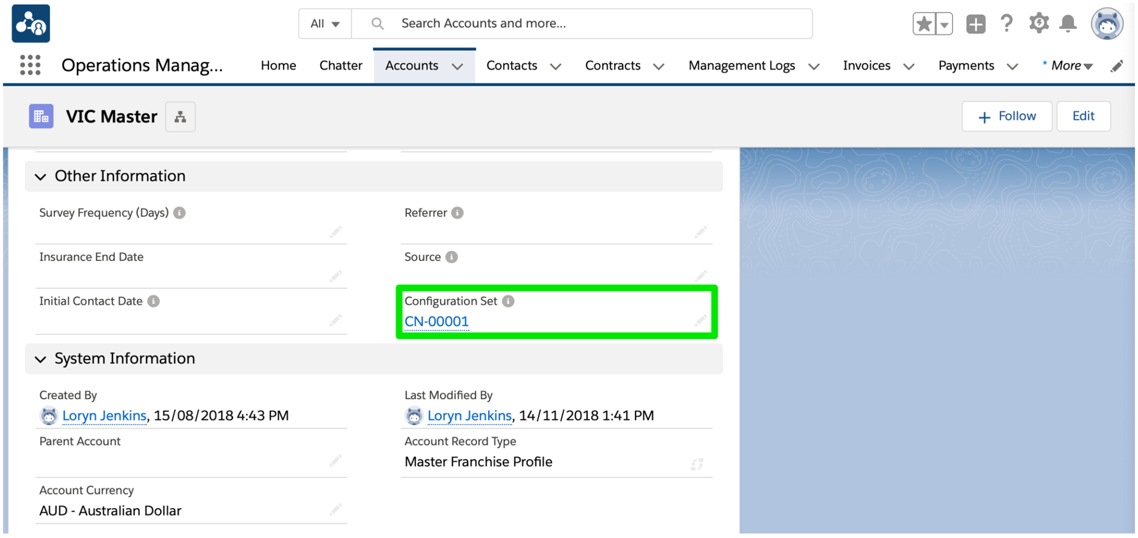
1. From the **Accounts** tab, select the **Master Franchise Profile Accounts** list view.



2. Select the Master Franchise Profile Account.

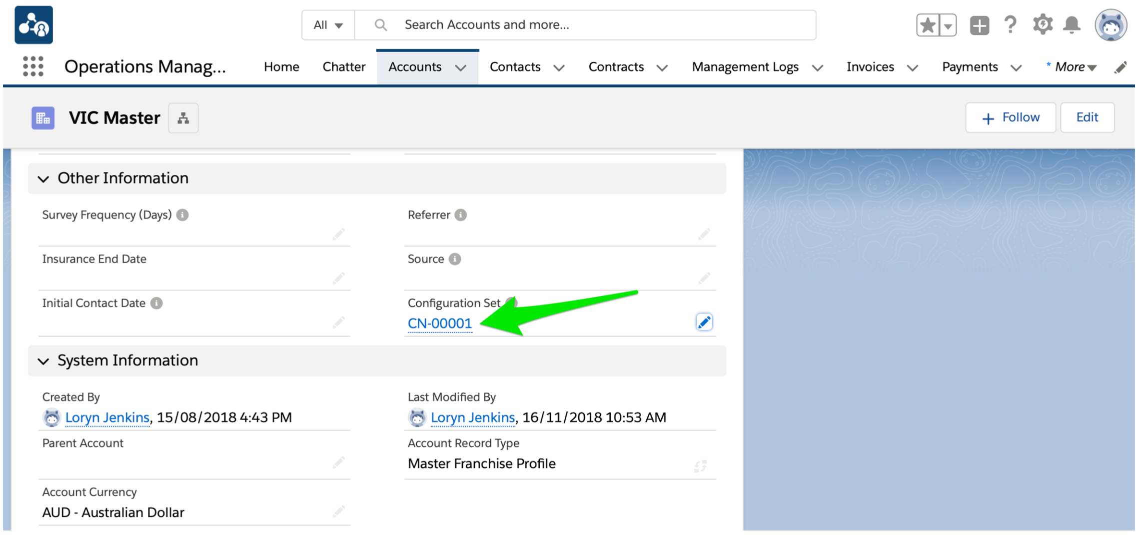


3. Scroll to the **Other Information** section to find the `Configuration Set`.



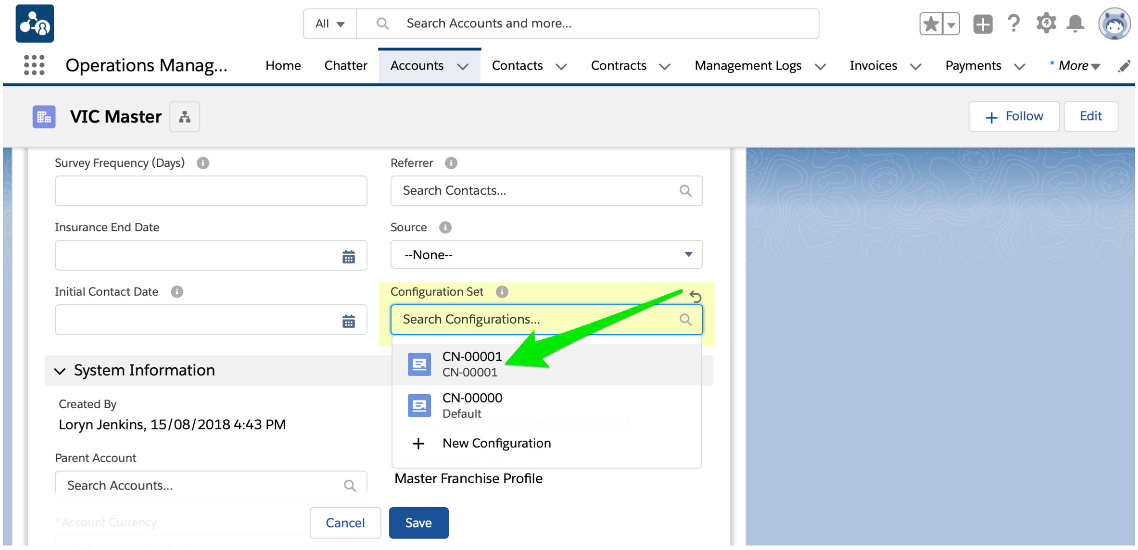
To view the Configuration Set

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



To select an existing Configuration Set

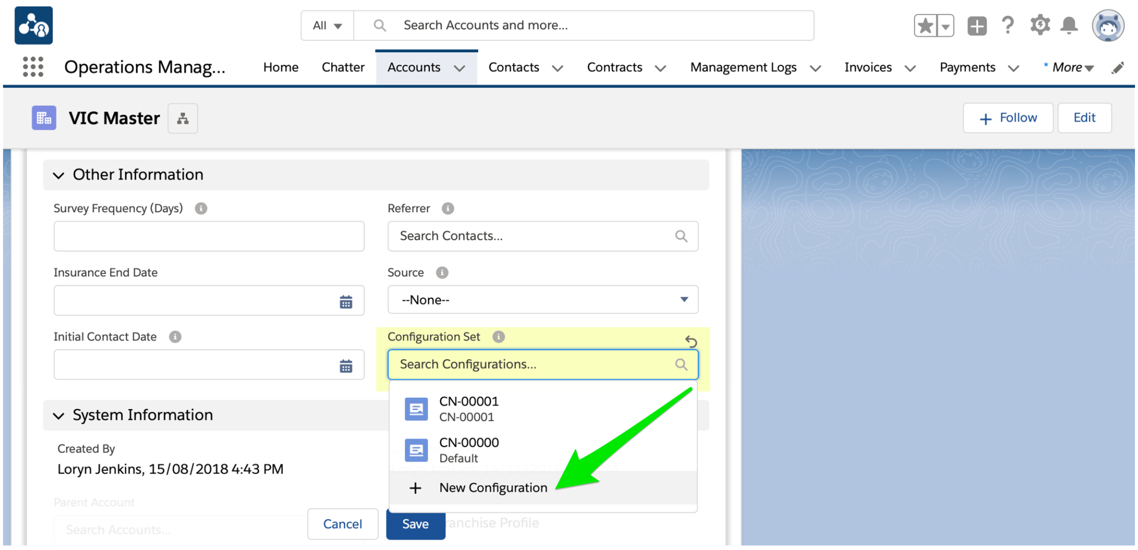
1. To select an existing `Configuration Set`, press the **Edit** button, then choose from the existing Configuration Sets.



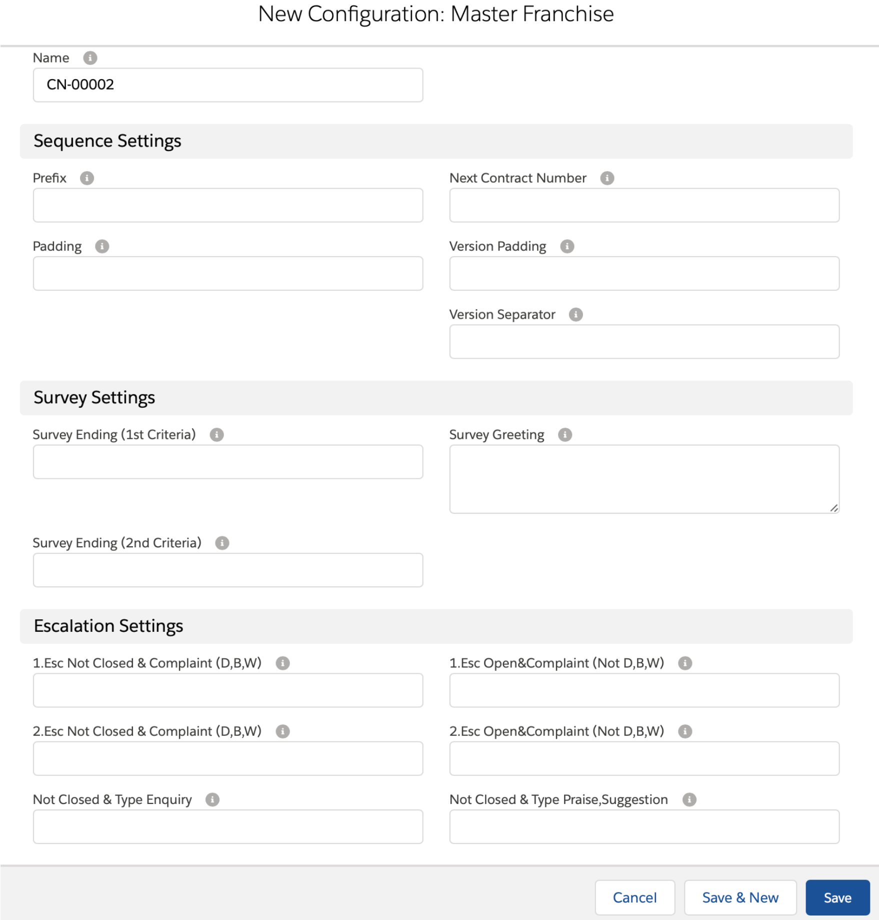
> You may need to search for a Configuration Set if it does not immediately appear on the list.

To create a new Configuration Set

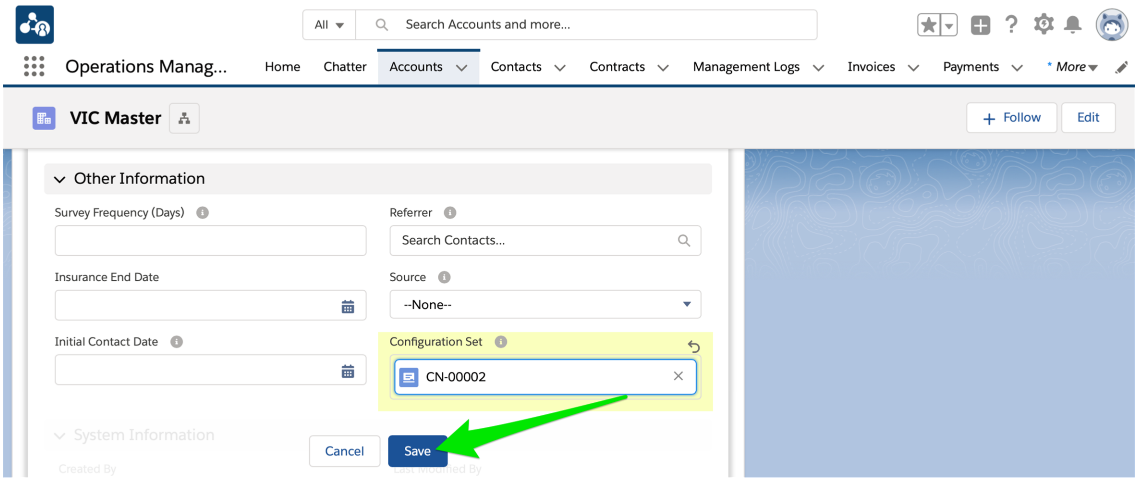
1. When there is no current `Configuration Set`, **Edit** the field in order to either select an existing one or create a new one.



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



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



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

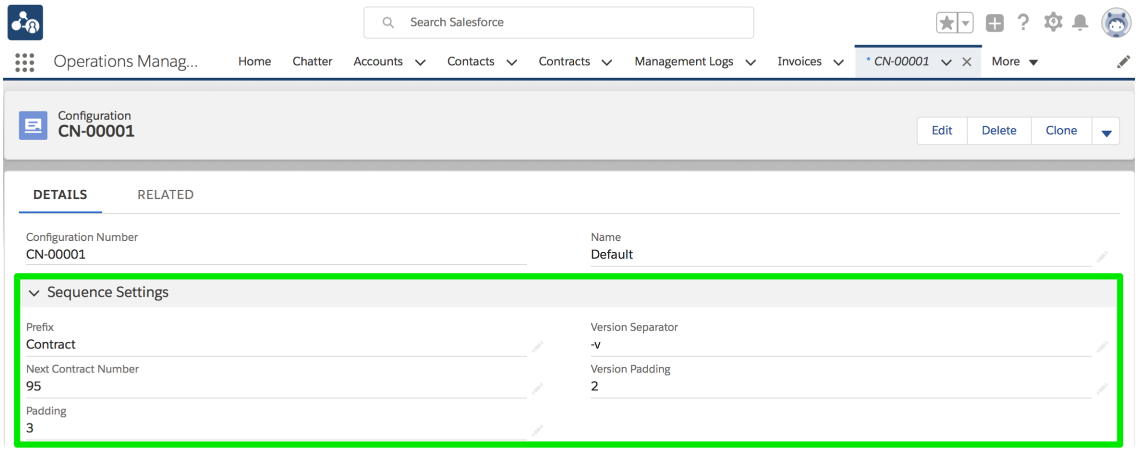
- *See* “How to configure contract expiry notifications” on page 16
- *See* “How to configure job allocation” on page 17
- *See* “How to configure customer matching criteria” on page 18
- How to configure insurance policy reminders
- *See* “How to configure financial syncing” on page 129

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.



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*

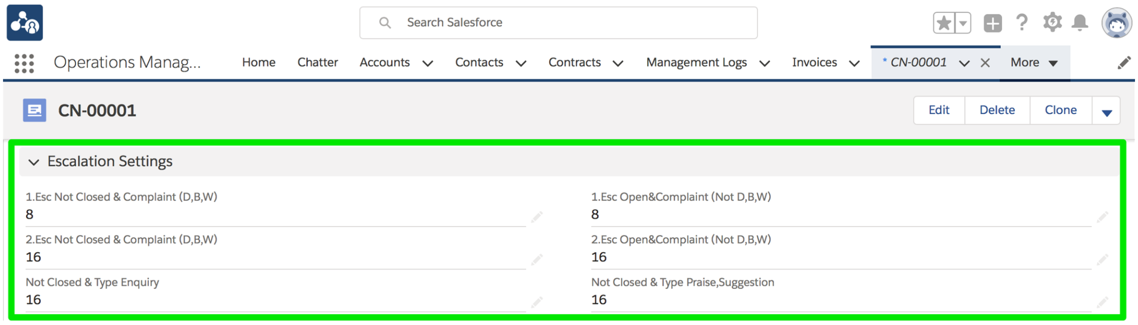
You can use this system to customize your contract sequence numbering.

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.



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.

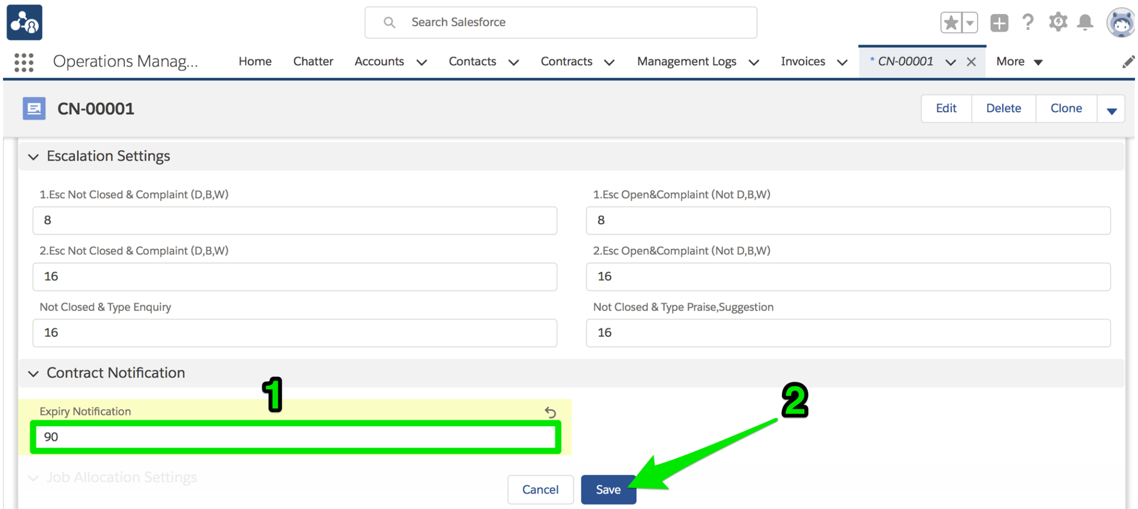
3. Press **Save**.

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**.

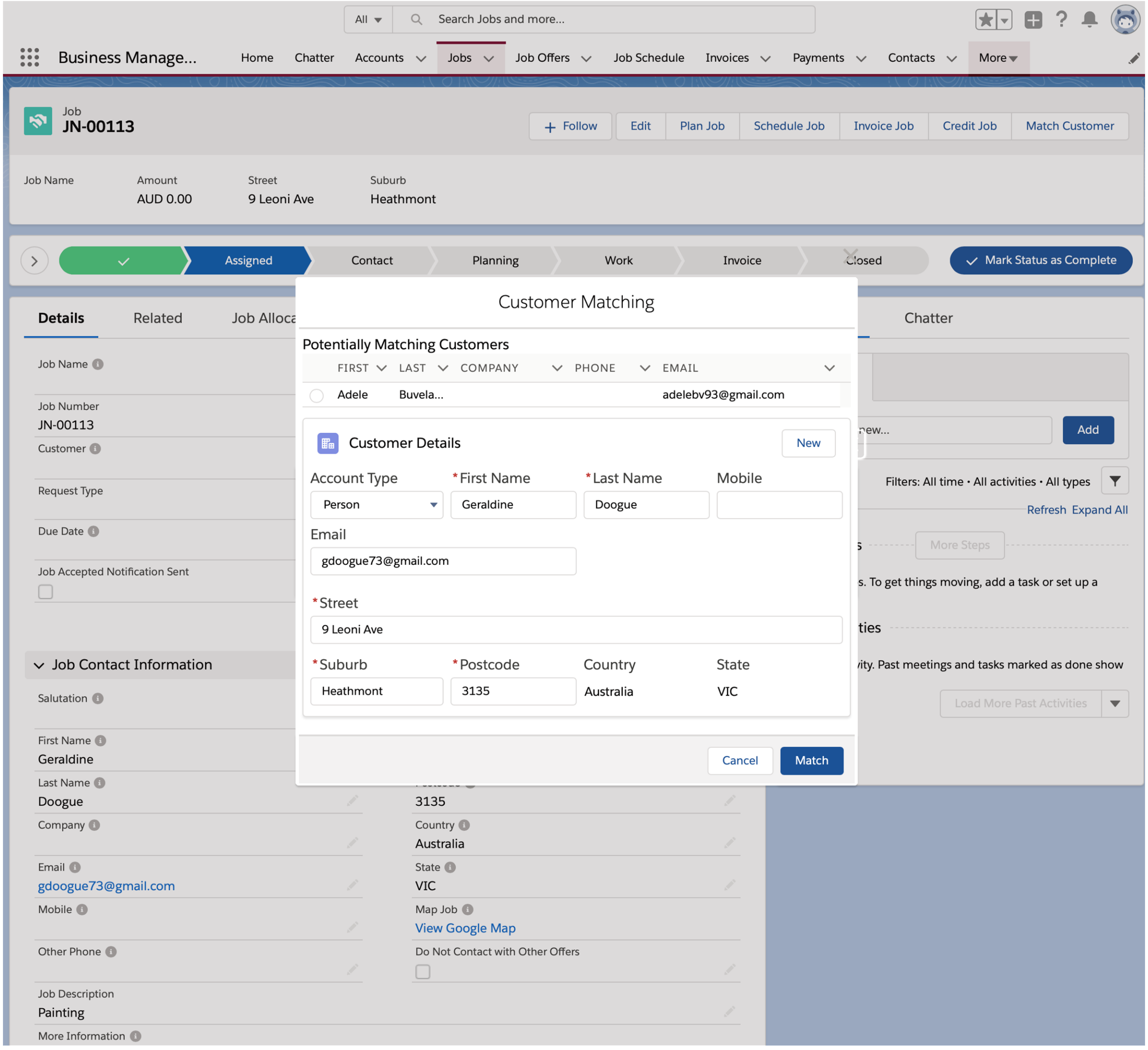


How to configure job allocation

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

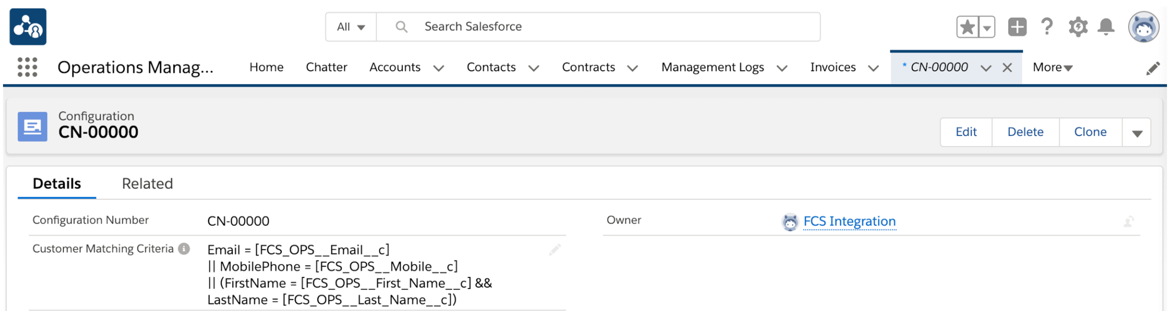
How to configure customer matching criteria

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.

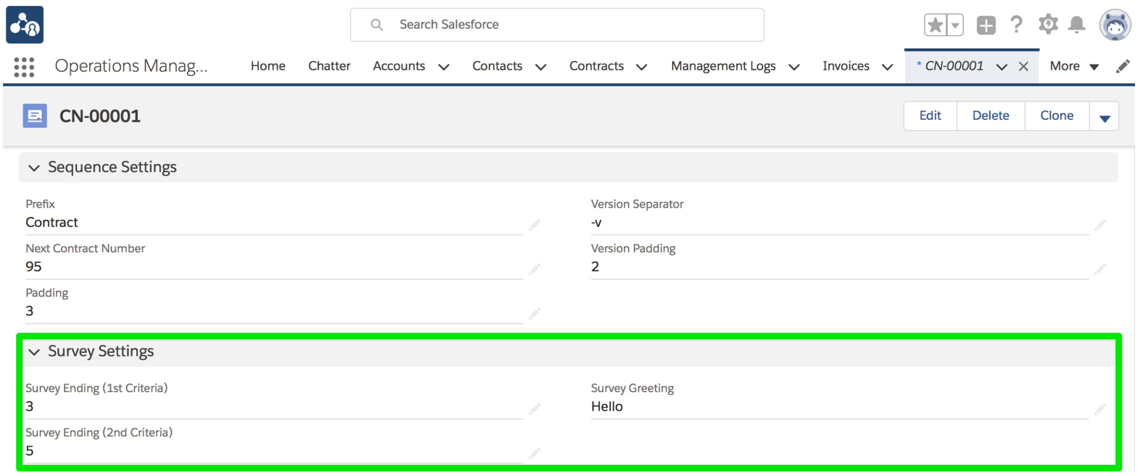
The means of limiting the maximum survey frequency is to only select jobs whose job numbers end in one of two configurable digits. For example, the digits 3 and 5 may be selected as the survey digits. Therefore jobs JN-00243 and JN-00245 will be selected as possible candidates for surveying, whereas 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.



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

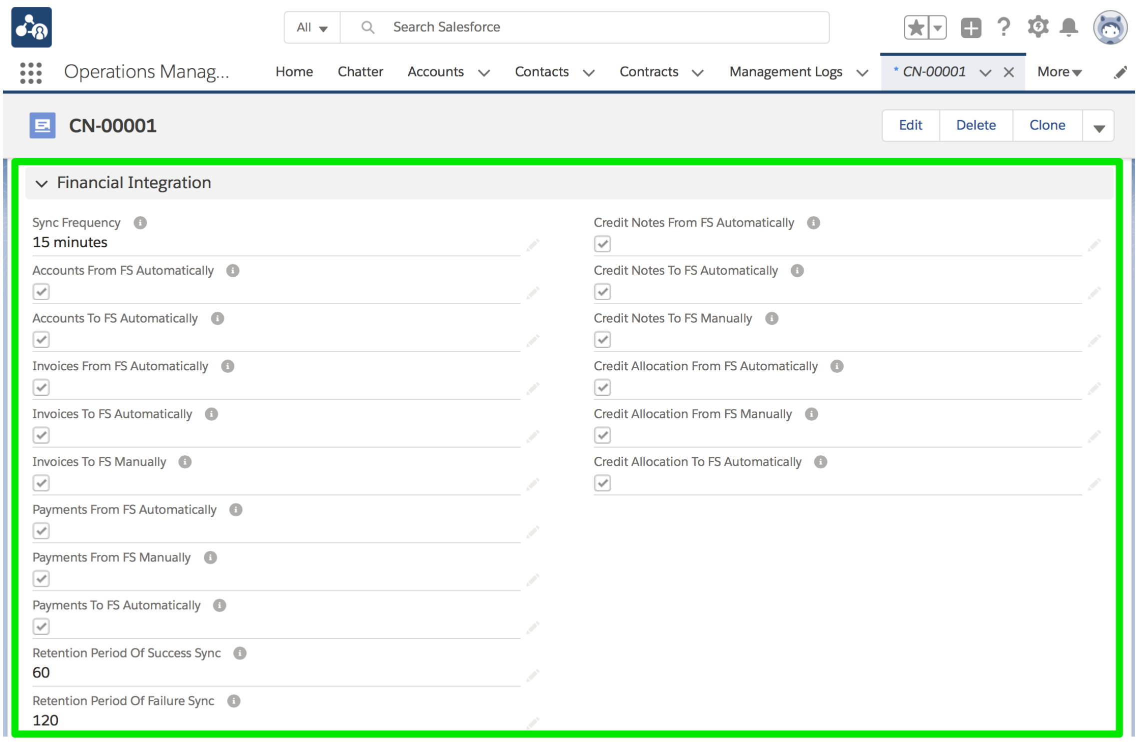
   These settings will cause jobs whose numbers end in either of these digits to be considered for receipt of a job survey.

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

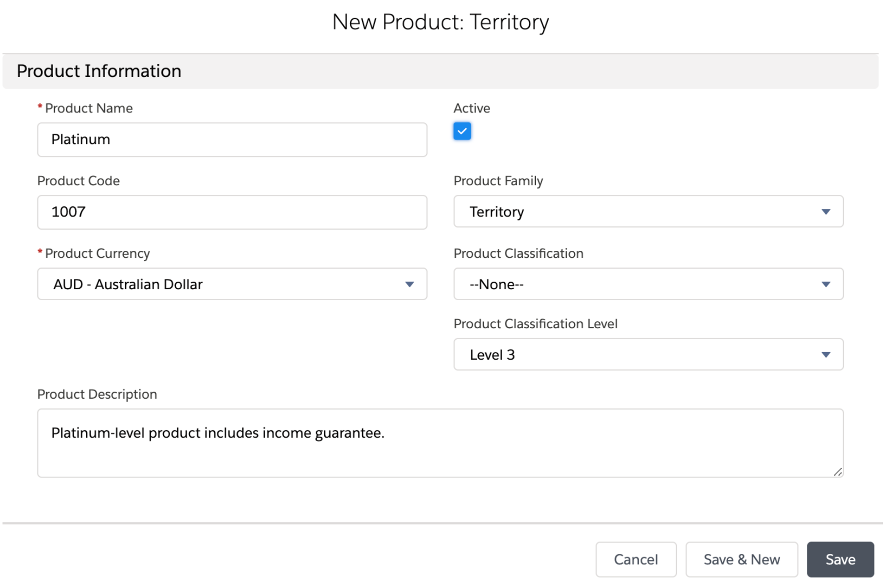
How to create a product

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

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

To add a new product:

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



The new product is now available for use within territories.

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

CHAPTER 5

Working with Territories

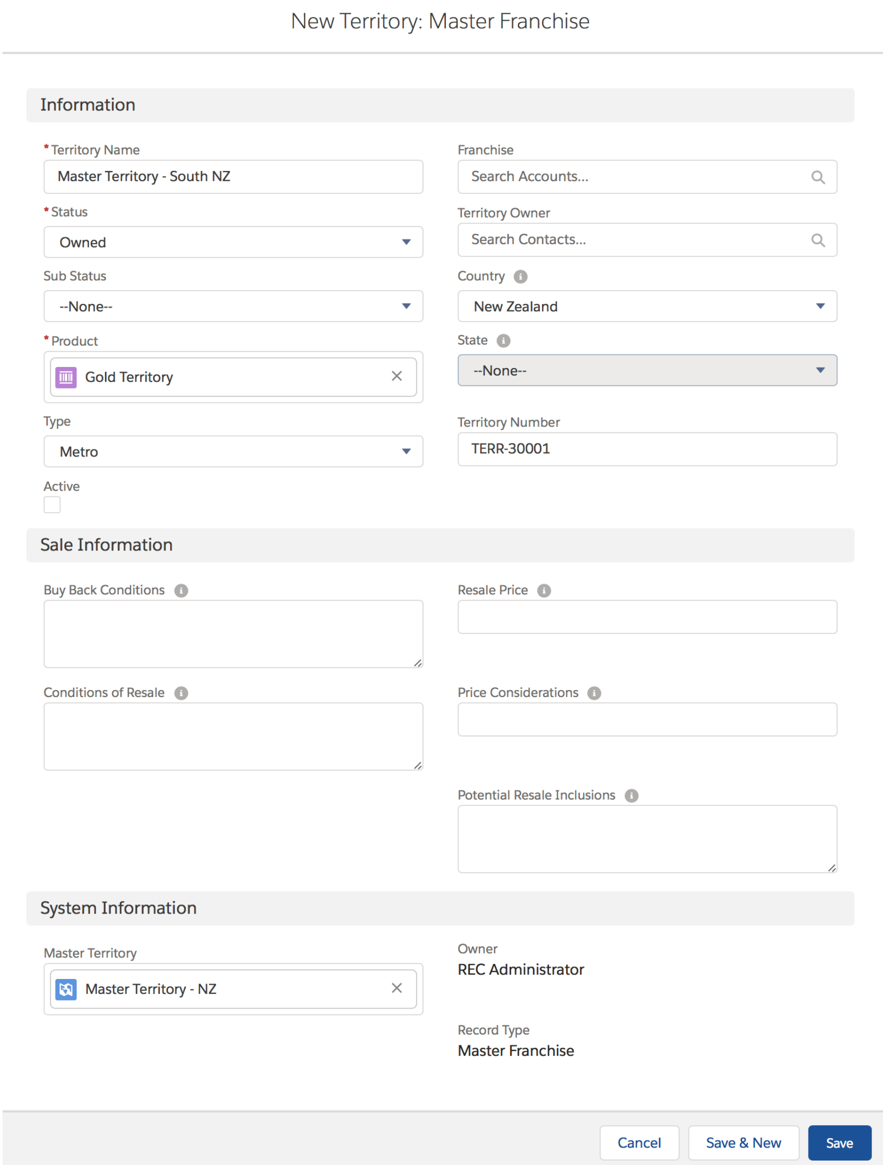
How to create a master territory

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

To create a new master territory

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

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



Field Notes

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

How to create a franchise territory

A franchise territory is 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.

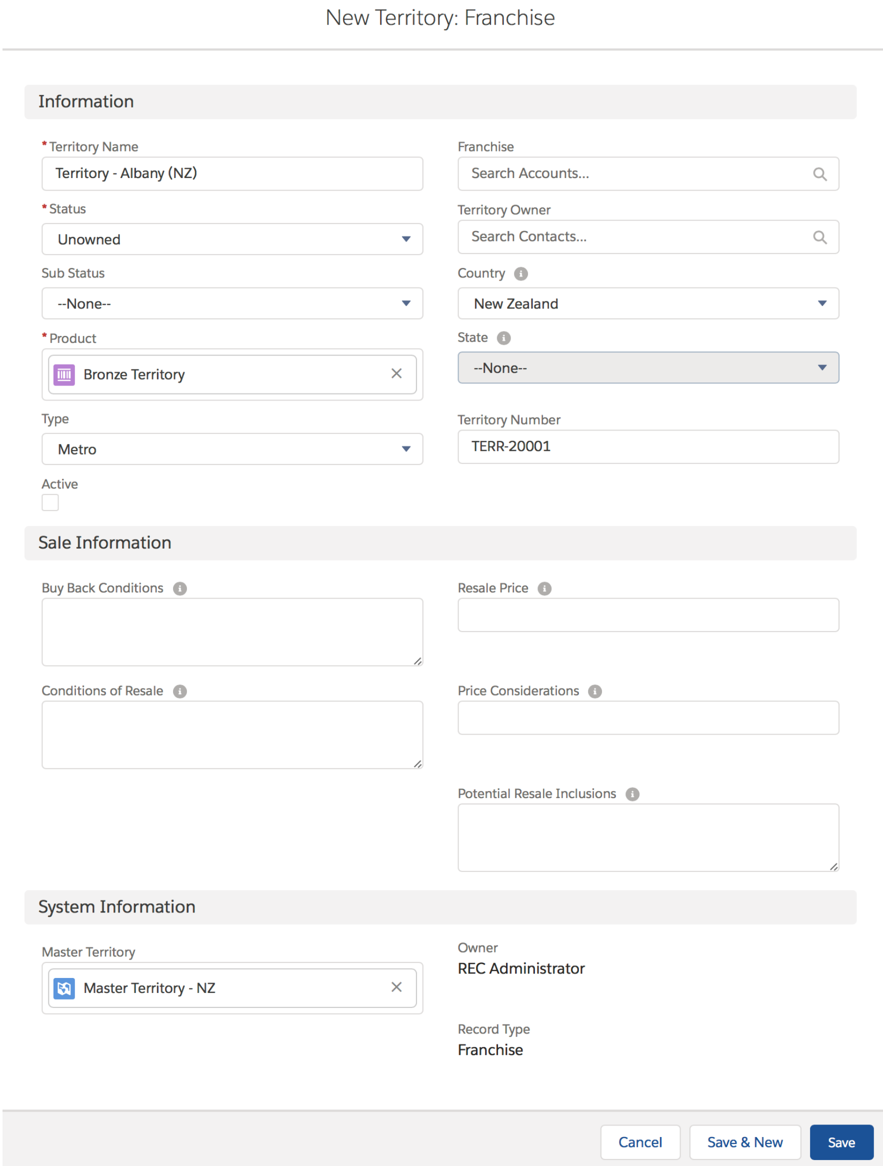
To create a franchise territory ready for sale

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**.



Field Notes

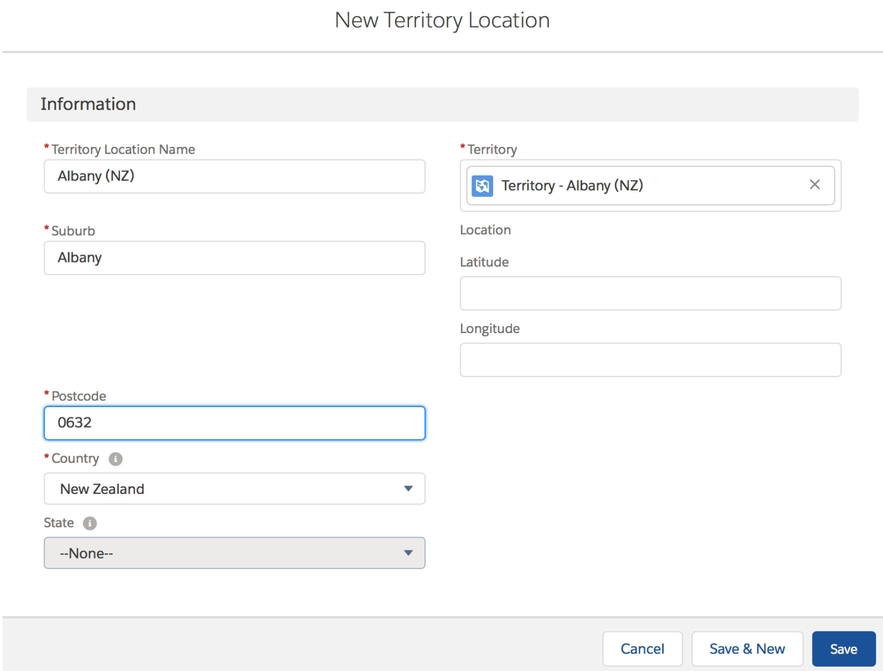
- Enter the `Territory Name` as the primary user identifier for this record.
- Set `Status` to *Unowned* as when first configuring the territory for sale.
- Generally leave Substatus as *--None--* when first configuring the territory for sale.
- Select the appropriate `Product` based on the territory's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

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

To set the franchise location

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

   The **New Territory Location** dialog box appears.
3. Complete the details as appropriate.



Field Notes

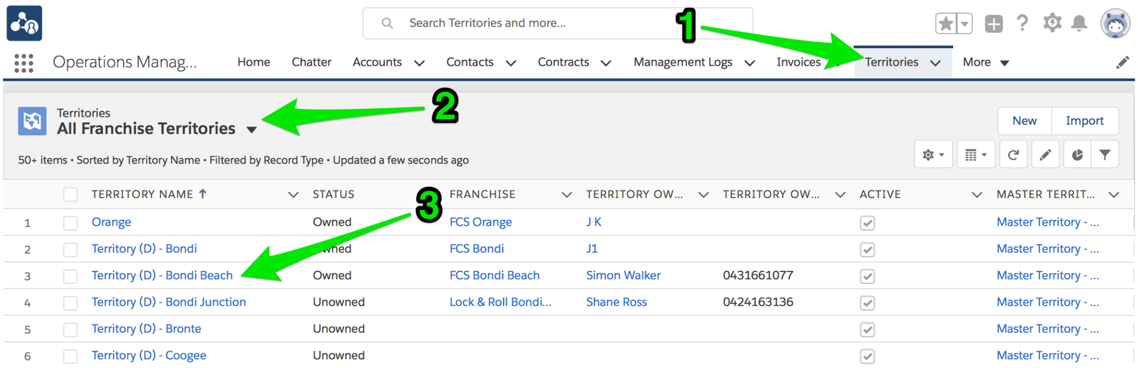
- Enter a `Territory Location Name` that will identify this territory.
- Enter a `Suburb` name that describes this location.

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

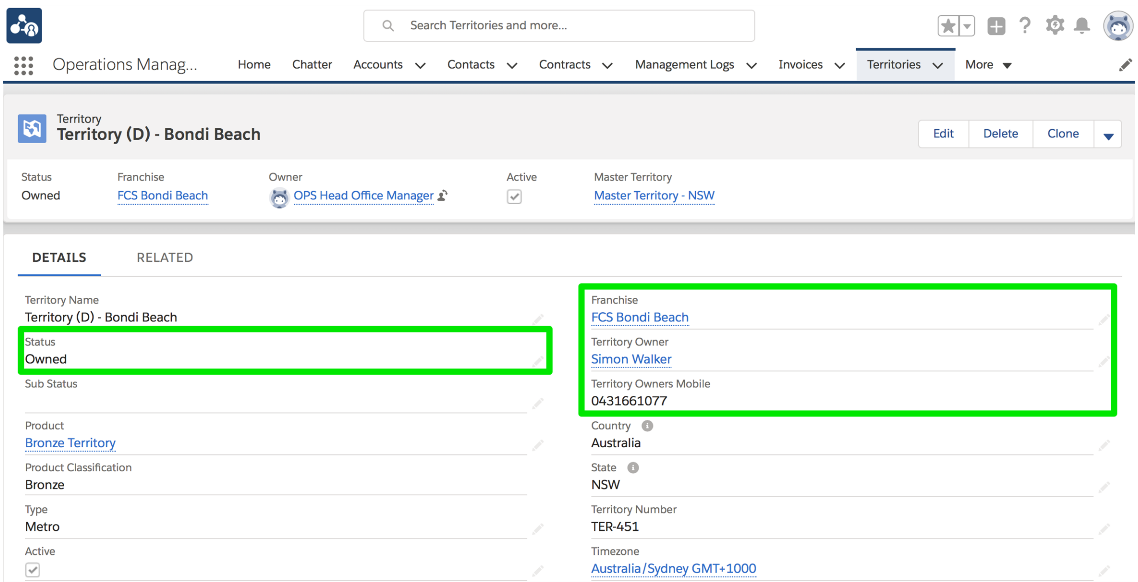
How to register the owner and operator of a territory

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**.



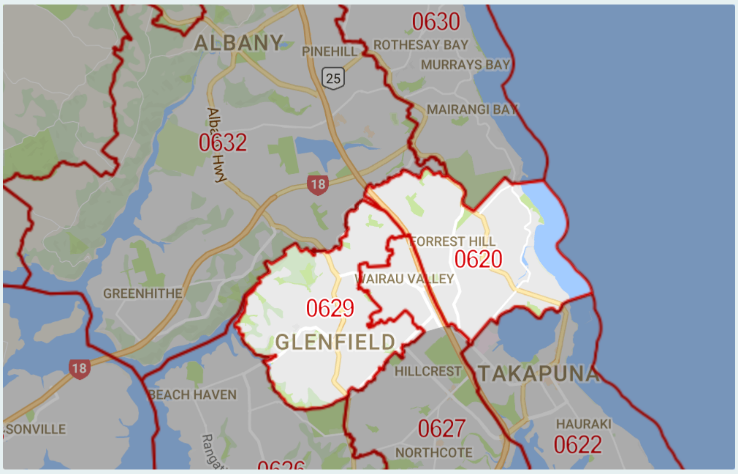
3. Set the key fields on the Territory, including the `Franchise`, `Territory Owner` and `Status`, then **Save** the record.



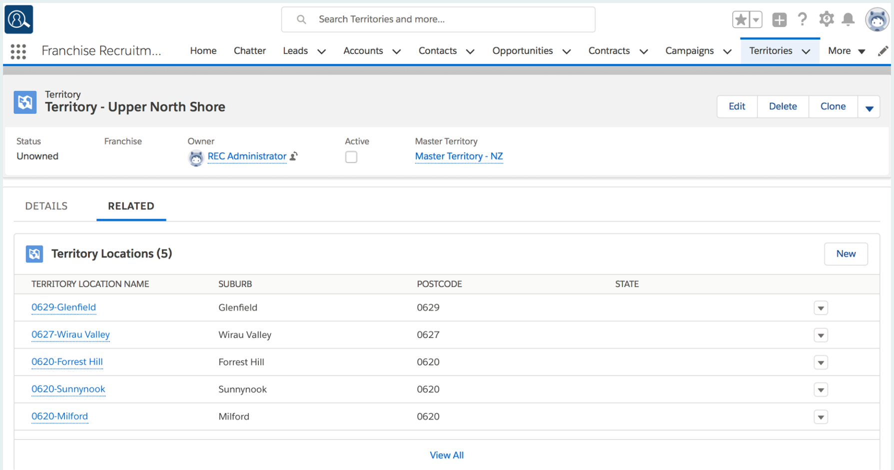
How to split or merge franchise territories

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 LOCATION NAME	SUBURB	POSTCODE	STATE
0629-Glenfield	Glenfield	0629	
0627-Wirau Valley	Wirau Valley	0627	
0620-Forrest Hill	Forrest Hill	0620	
0620-Sunnynook	Sunnynook	0620	
0620-Milford	Milford	0620	

View All

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

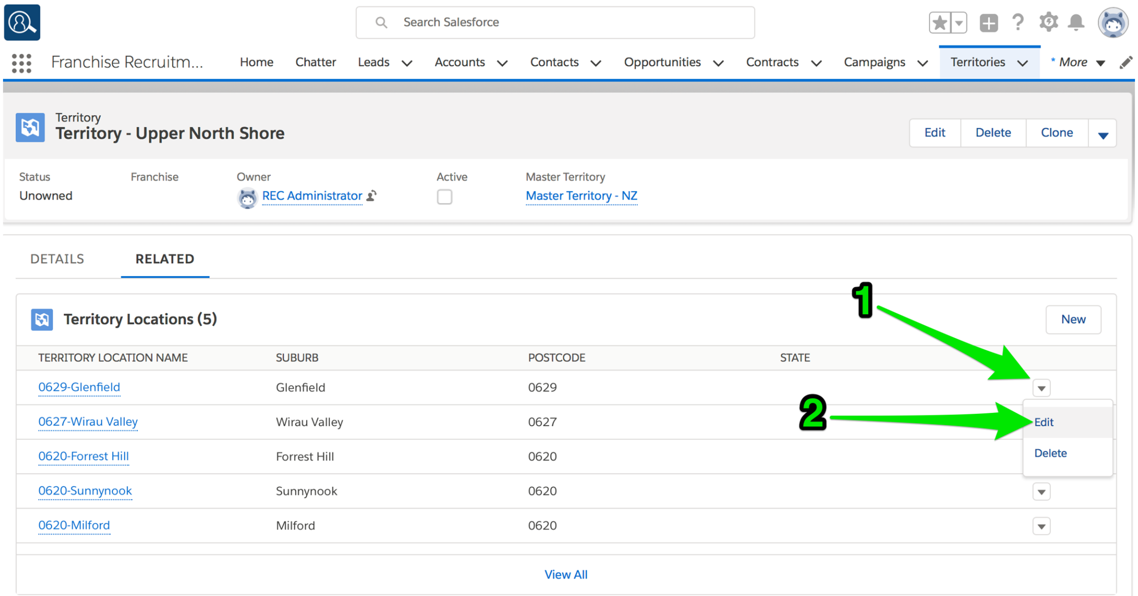
To split a territory

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.

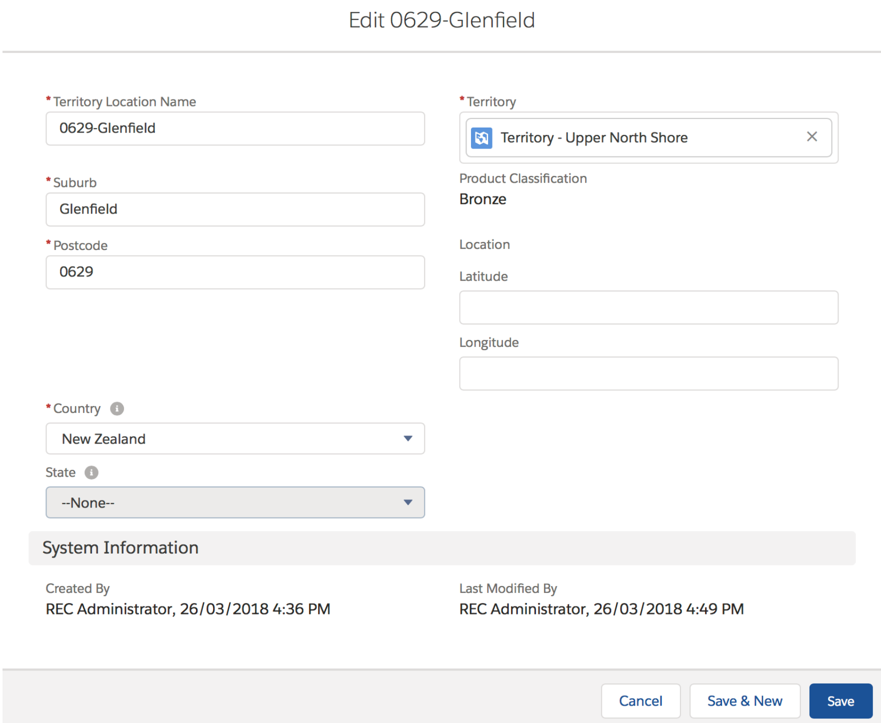
3. Add a **New Territory Relationship**. *See* “To add a split Territory Relationship record” on the facing page.

To move a Territory Location record

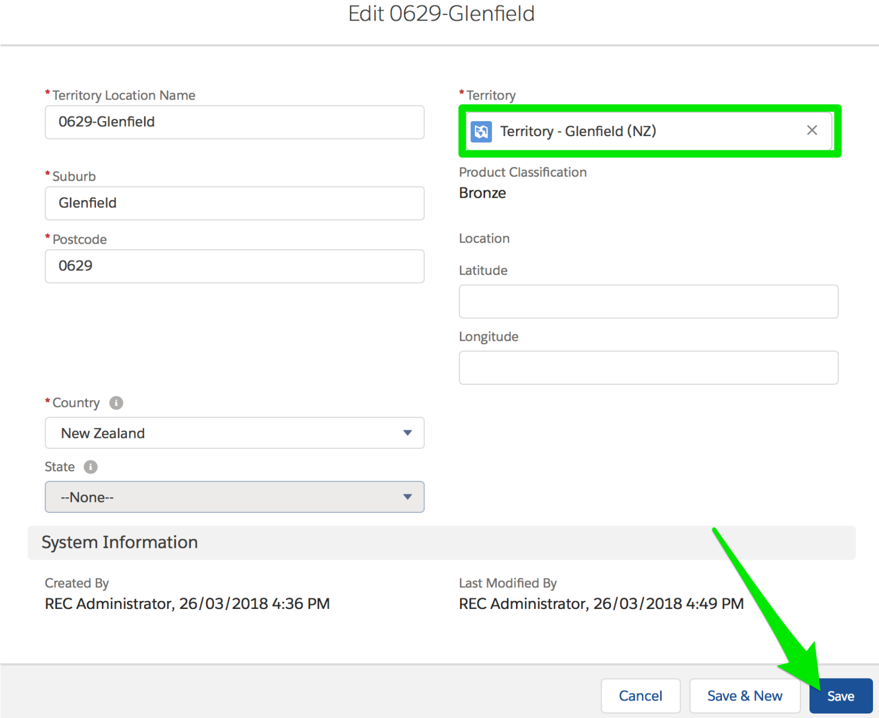
1. From **Territory Locations**, select **Edit**.



The **Edit** dialog box appears.



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

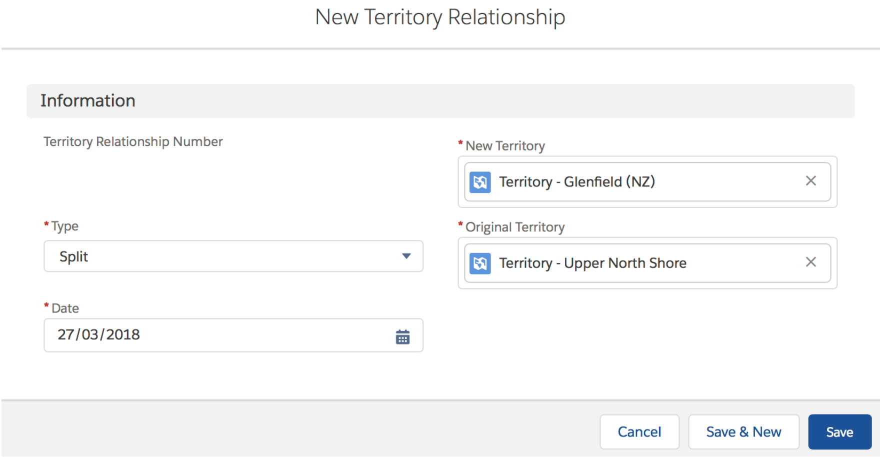


> When you go to the new territory, you may not immediately see the moved Territory Location records. If this happens, select the **Territory Location**'s **View All** link. You will see all the **Territory Locations** attached to the territory, and they will now display on the **Territory**'s **Related**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

To add a split Territory Relationship record

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

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



5. Now press **Save**.

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

To merge territories

1. Note the territory that is the merge target. Create it if necessary.
2. Go to the territory containing the Territory Location record.
3. Move the Territory Location record. *See* "To move a Territory Location record" on page 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

Overview of User Types

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

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

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	*Salesforce Platform*	*Salesforce Platform*	*Salesforce Platform*
Role	Appropriate for the Master Franchise	Appropriate for the Master Franchise	Appropriate for the Master Franchise
Profile	Select from one of the following » *OPS Field Manager* » *OPS Compliance Manager* » *OPS Operations Manager* » *OPS Finance Manager* » *OPS Head Office Manager* » *OPS Administrator*	*OPS Franchise Owner*	*OPS Franchise Employee*
Permission Set License Assignment	*Orders Platform*	N/A	N/A

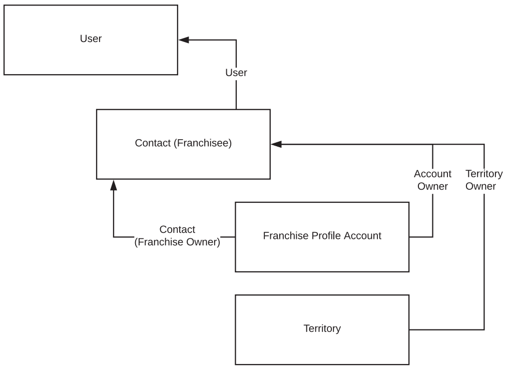
Field	Head Office User	Franchise Owner	Franchise Employee
Managed Packages	For all users » *Base* » *FranchiseOps* Then select optional components » *SMS*	For all users » *Base* » *FranchiseOps* Then select optional components » *SMS*	For all users » *Base* » *FranchiseOps* Then select optional components » *SMS*
Permission Set Assignment	One of the following » *OPS Field Manager Access* » *OPS Compliance Manager Access* » *OPS Operations Manager Access* » *OPS Finance Manager Access* » *OPS Head Office Manager Access* » *OPS Administrator Access* then optionally select from » *OPS Contract Management* if the user needs to manage contracts » *FIN Integration User Access* if the user is to have access to Financial Integration features » *OPS Nextdoc User* if the user is licensed to generate documents	» *FIN Integration User Access* if the user is to have access to Financial Integration features » *OPS Franchise Owner Access* » *OPS Nextdoc User*	» *OPS Franchise Employee Access* » *OPS Nextdoc User* if the user is to generate Quotes or Invoices

Field	Head Office User	Franchise Owner	Franchise Employee
`Permission Set Assignment`	If the `Managed Package` *`FranchiseOps`* has been selected, then you may optionally assign » *`OPS Audit User`* if the user needs to perform audits If the `Managed Package` *`FranchiseOps`* has been selected and the `Permission Set Assignment` is *`OPS Administrator Access`*, then you may optionally assign » *`OPS Audit Admin`* if the user needs to create new audit schedules		

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.



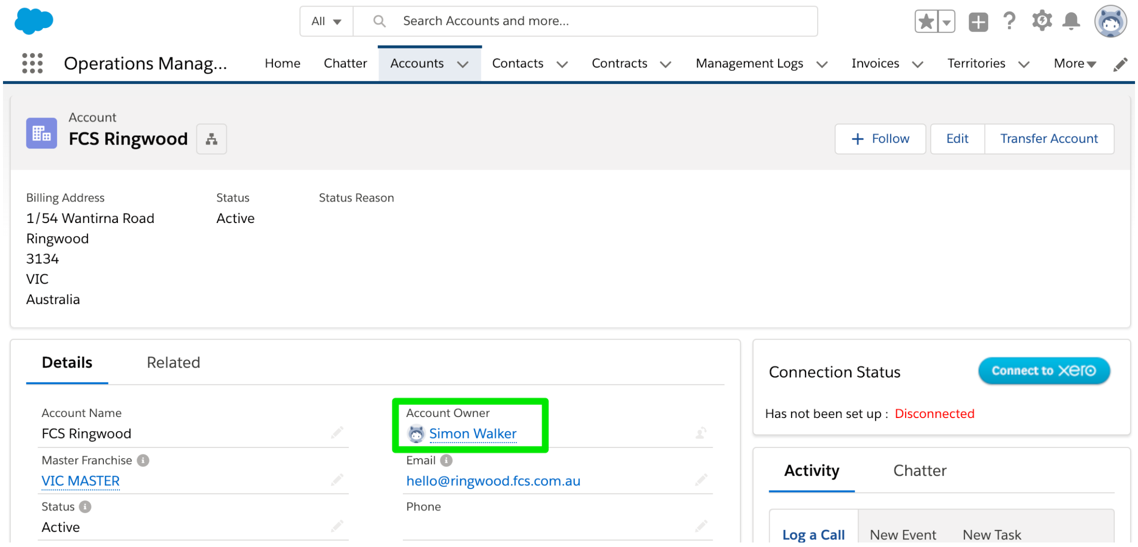
> The following procedure configures the user as a franchise owner and causes them to appear as a resource on the Job Calendar. To exclude them from the Job Calendar, *See* "How to prevent an employee from appearing as a job calendar resource" on page 51.

To configure a user as a franchise owner

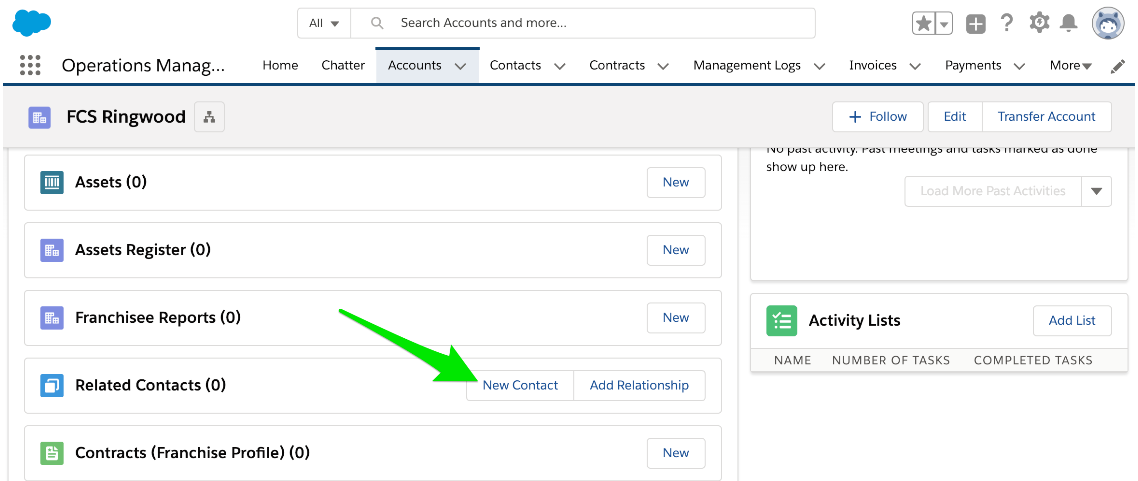
1. Create a user profile configured for a franchise owner.
   a. To create the user, follow Salesforce instructions.
   b. To configure the user profile for a franchise owner, *See* "How to create a user" on page 40.

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

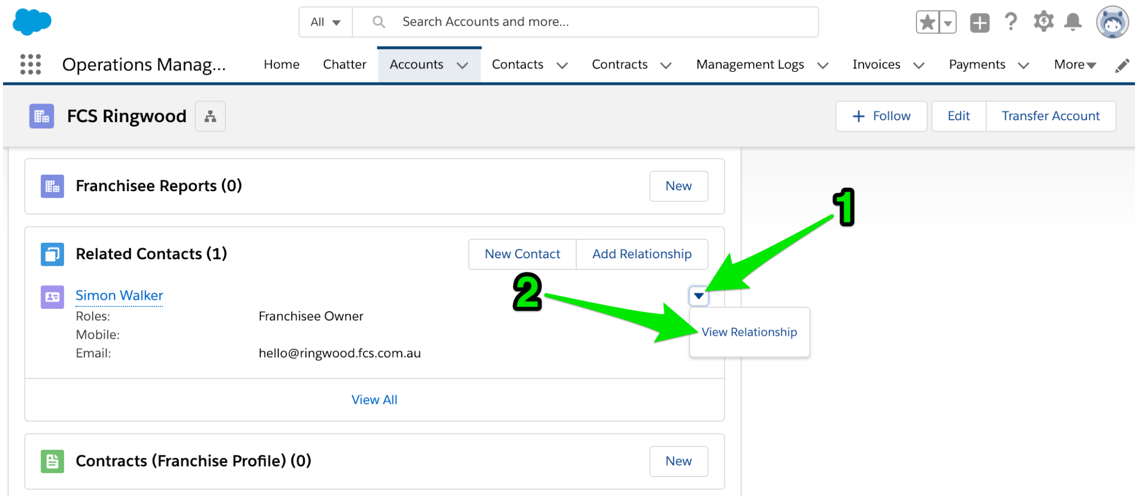
2. On the **Franchise Profile Account**, select the franchise owner's User as the `Account Owner`.



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.

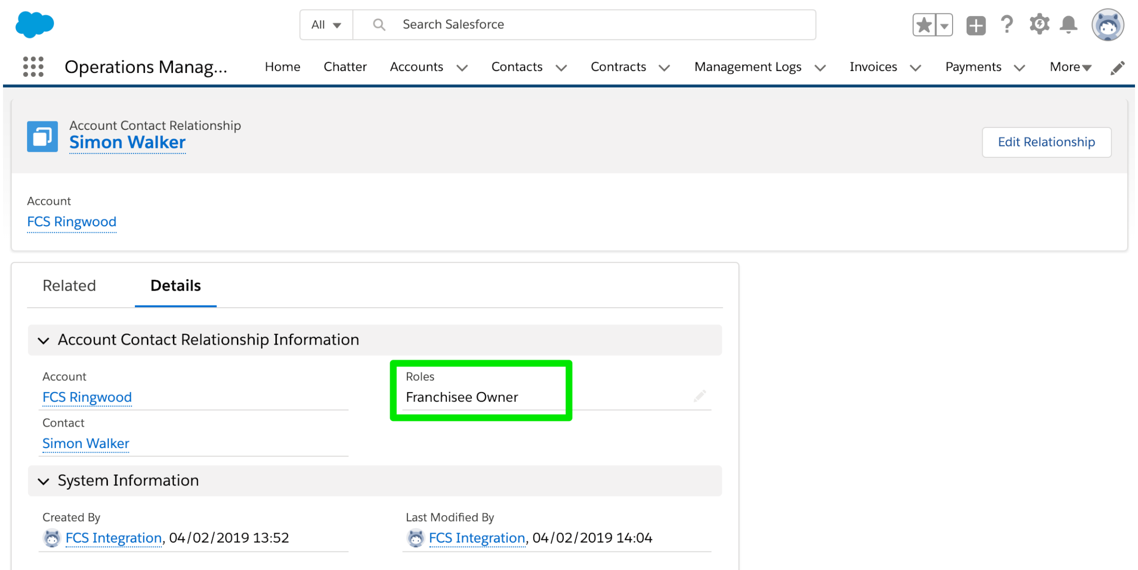


4. From the **Related Contacts** section, select **Edit** and then **View Relationship**.

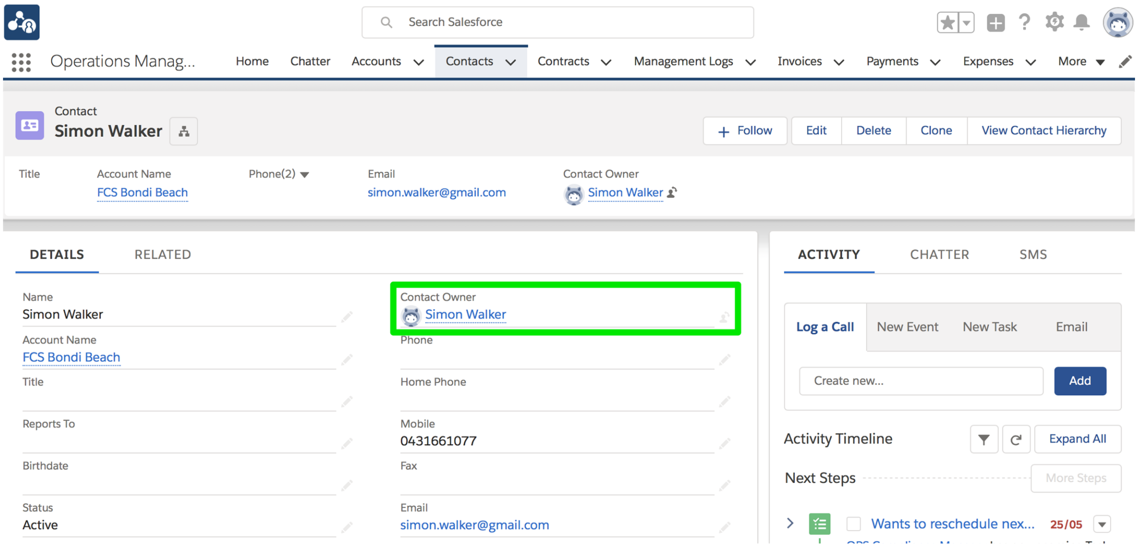


The **Account Contact Relationship** page displays.

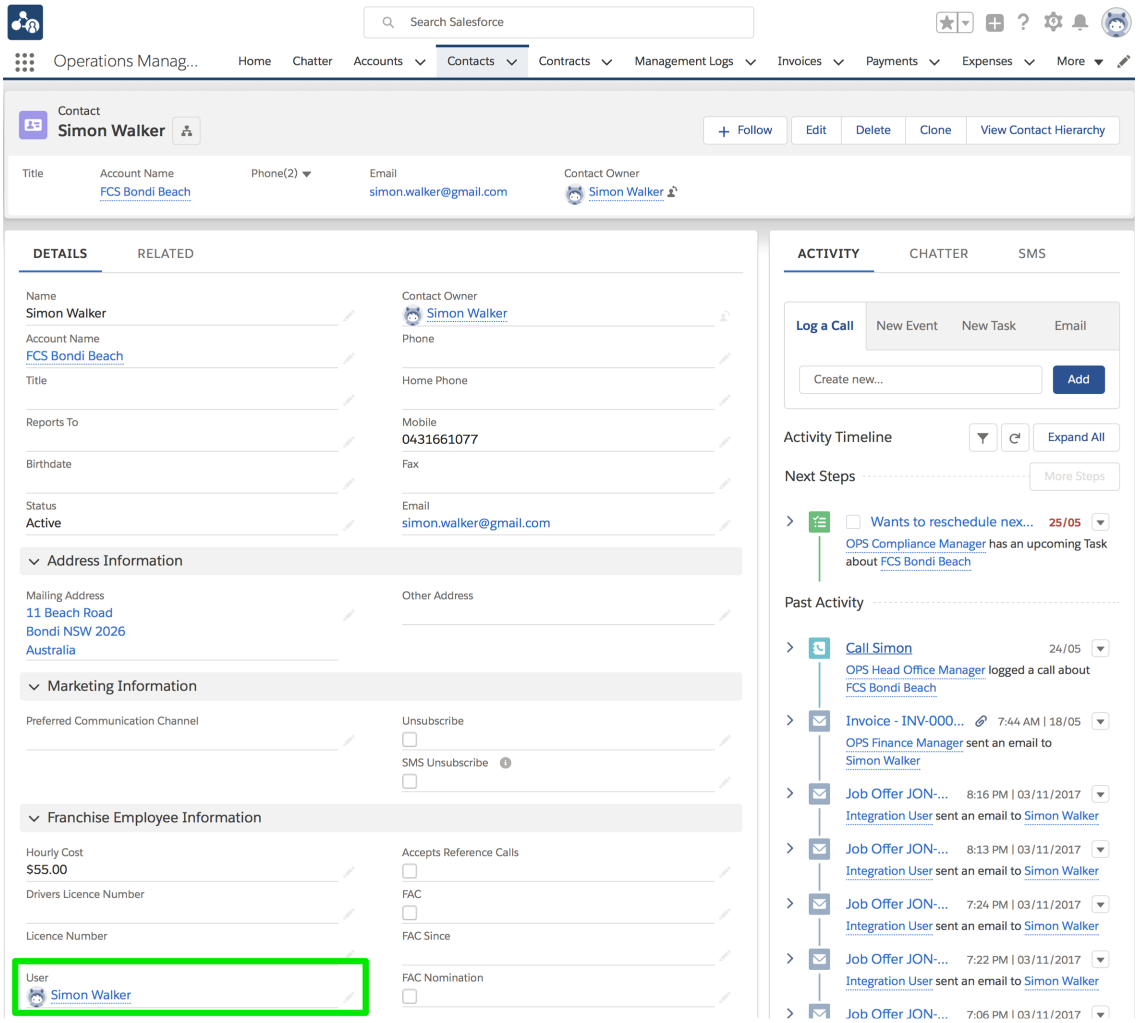
5. Set `Roles` to *`Franchise Owner`*.



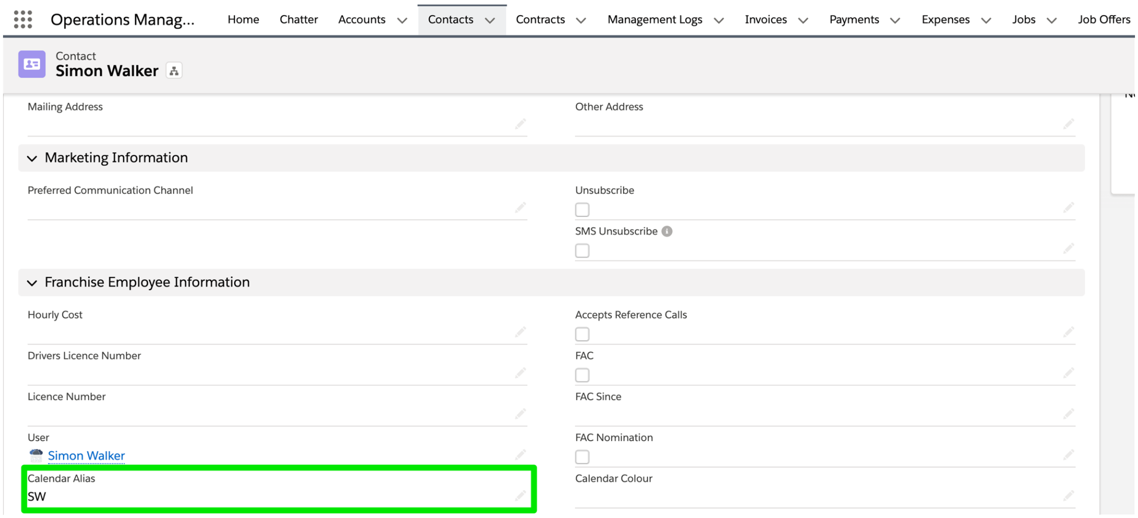
6. From the **Contact**, set the franchise owner User record as the `Contact Owner`.



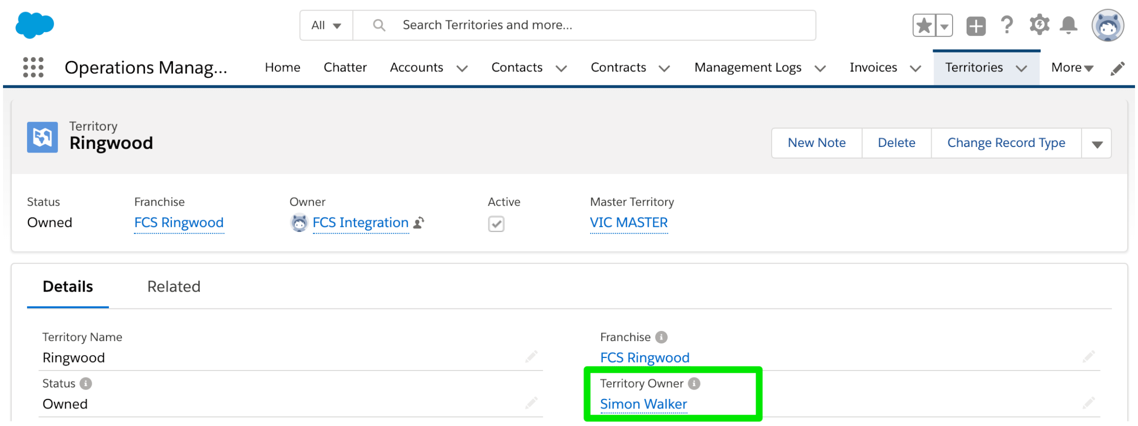
7. Set the **Contact** `Status` to *`Active`*.
8. Also set the **Contact**'s `User` field to the franchise owner's User record.



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



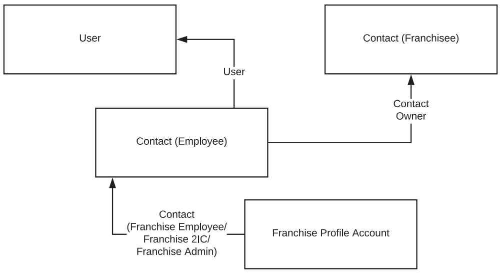
10. On the **Territory**, select the franchise owner's User as the `Territory Owner`.



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.

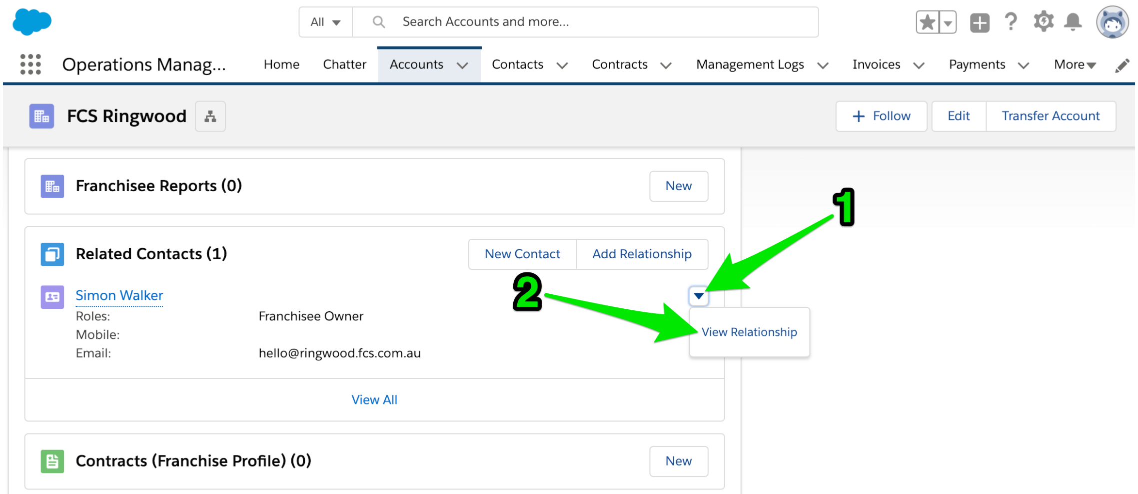
When you add a franchise employee user

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.

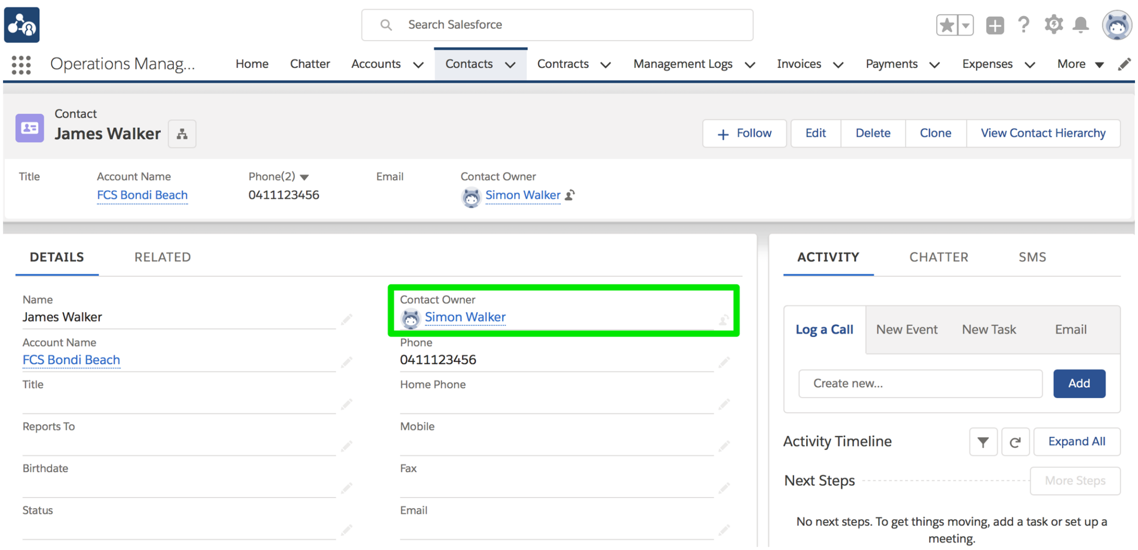
In the below example, Simon Walker is the name of our franchise owner user and James Walker the name of his new employee.

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**.

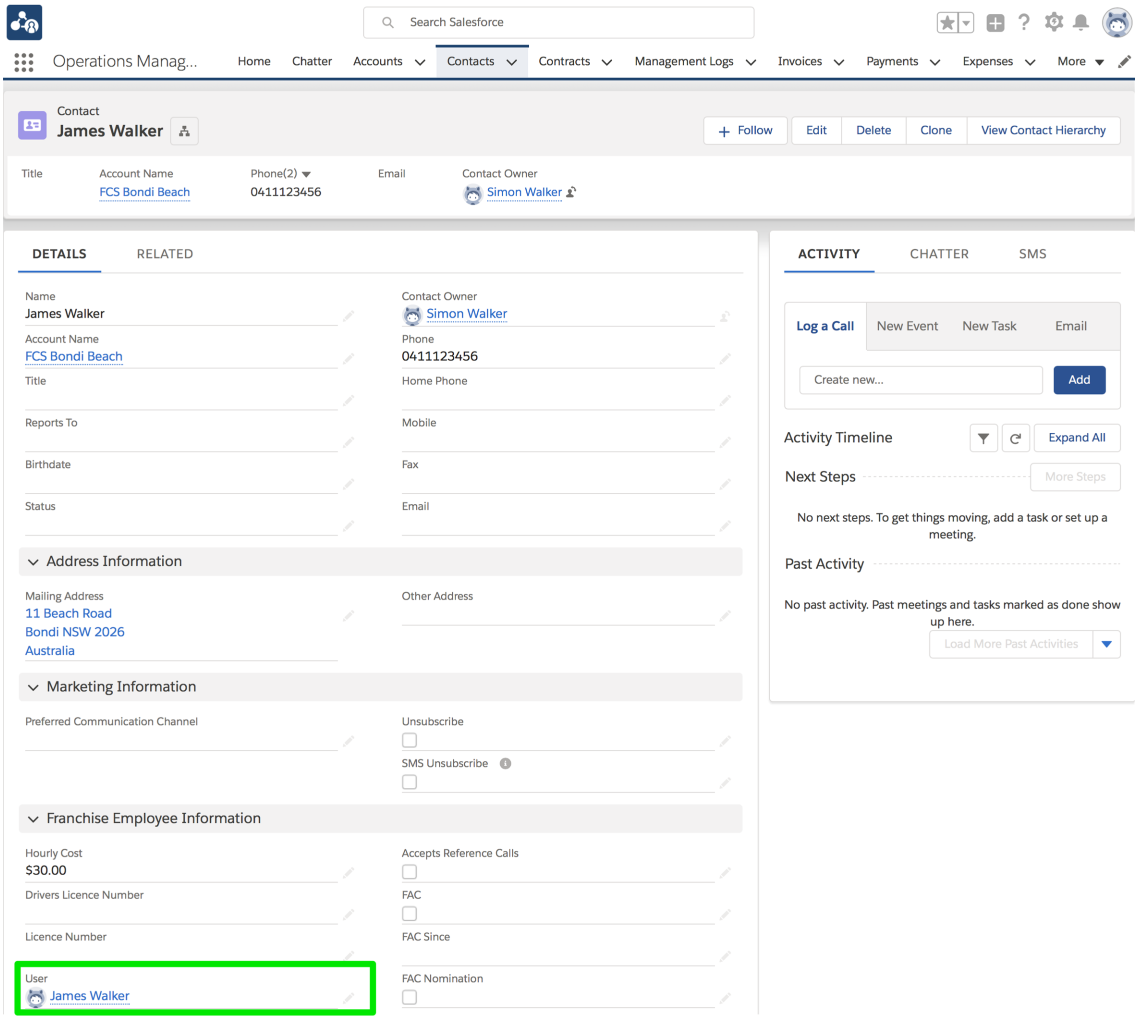


4. Set the `Role` to one of the following:
   a. *`Franchise Employee`*
   b. *`Franchise 2IC`*
   c. *`Franchise Admin`*
5. On the **Contact**, set the franchise owner user as the `Contact Owner`.

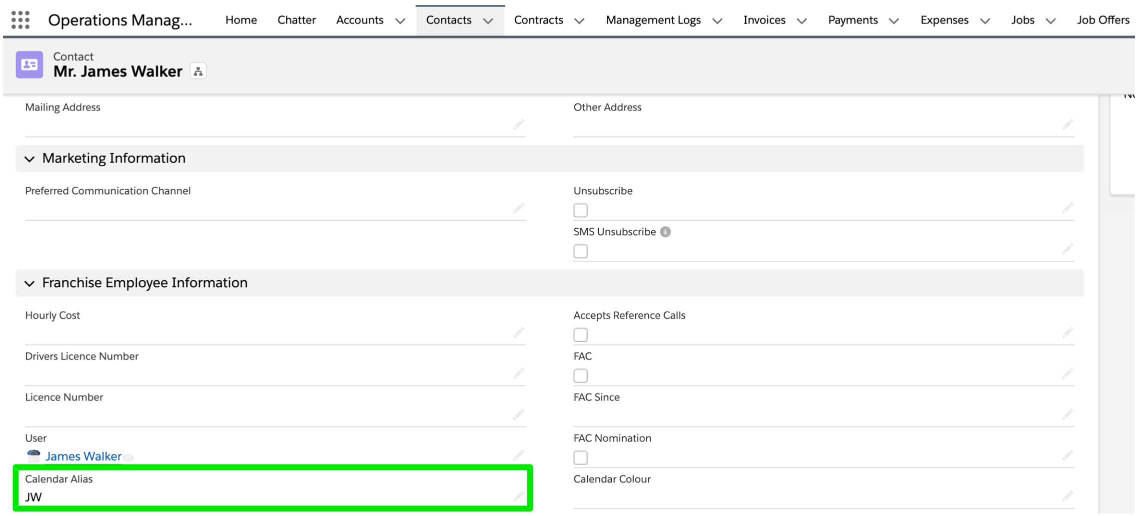


6. Set the **Contact** `Status` to *`Active`*.

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

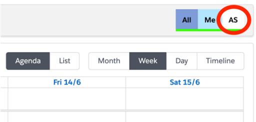


8. And set the **Contact**'s `Calendar Alias` to an appropriate value.



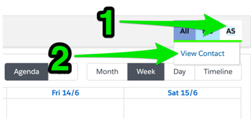
How to prevent an employee from appearing as a job calendar resource

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.

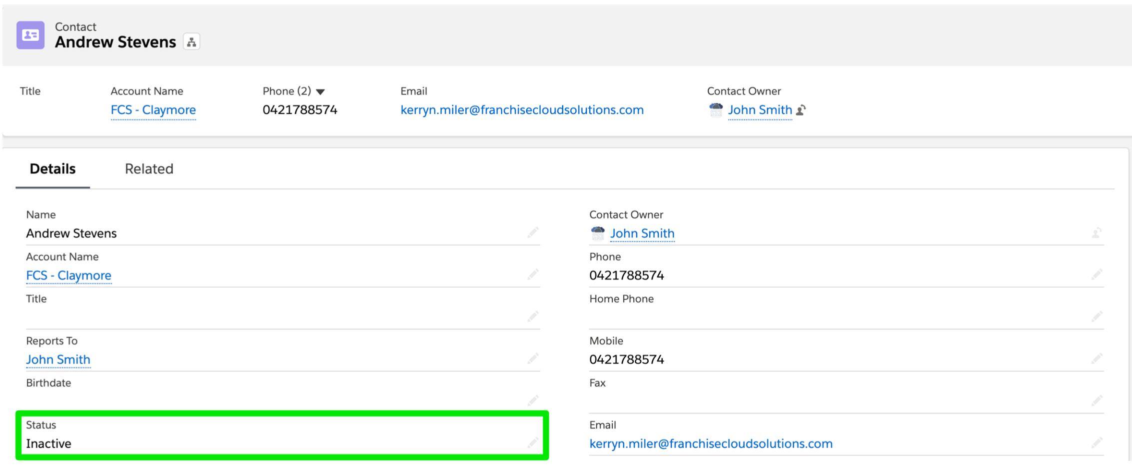


To prevent an employee from appearing as a resource on Job Calendar

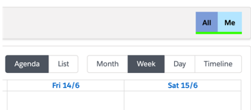
1. On the **Job Calendar**, right-click on the resource, then select **View Contact**.



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

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 franchise.

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.

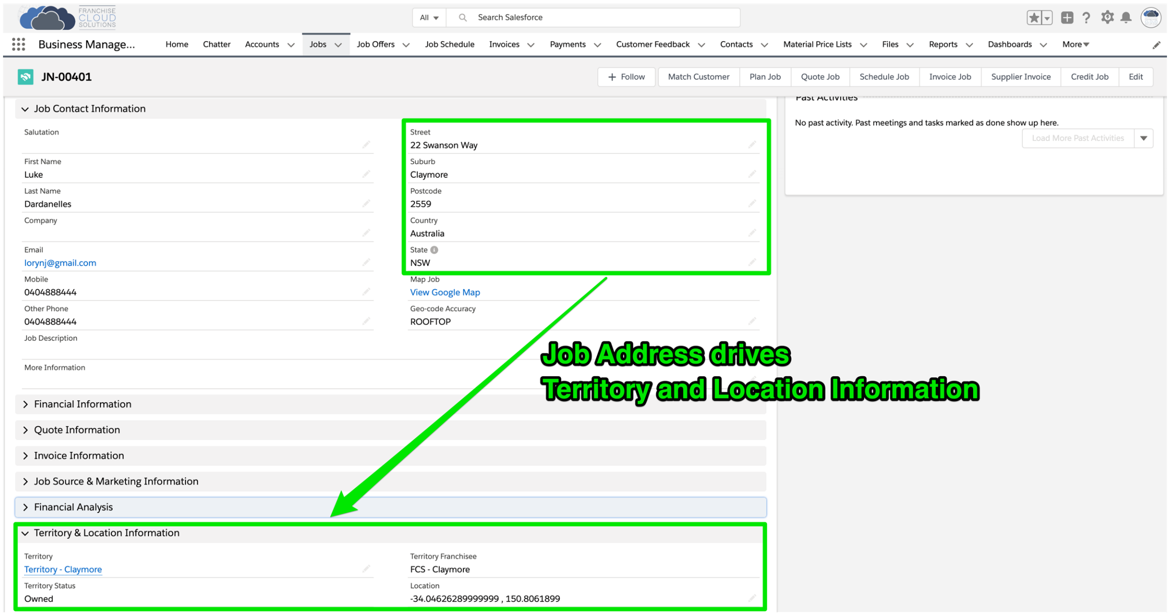
This chapter describes:

- 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 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+)

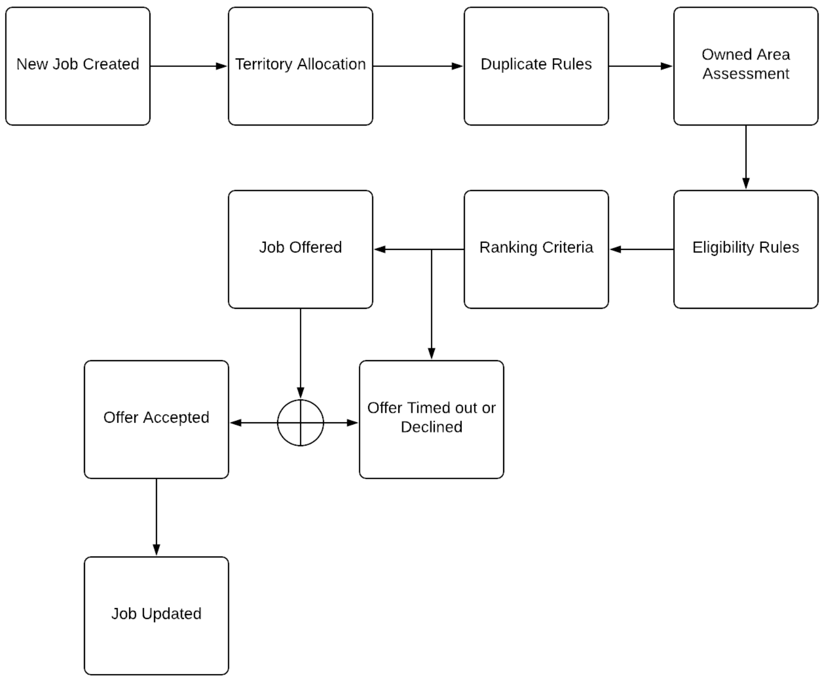
JOB POTENTIAL: JOB POTENTIAL NU...	ACCOUNT NAME	EXCLUSION REASON	OFFERED
JPN-00797	FCS - Narellan Vale	Potential is on Territory Only	☐
JPN-00799	FCS Maroubra	Potential Franchisee is not active	☐
JPN-00794	FCS - Bexley		☑
JPN-00793	FCS - Kingsgrove		☐
JPN-00796	FCS - Sans Souci		☐
JPN-00798	FCS - Campsie		☐

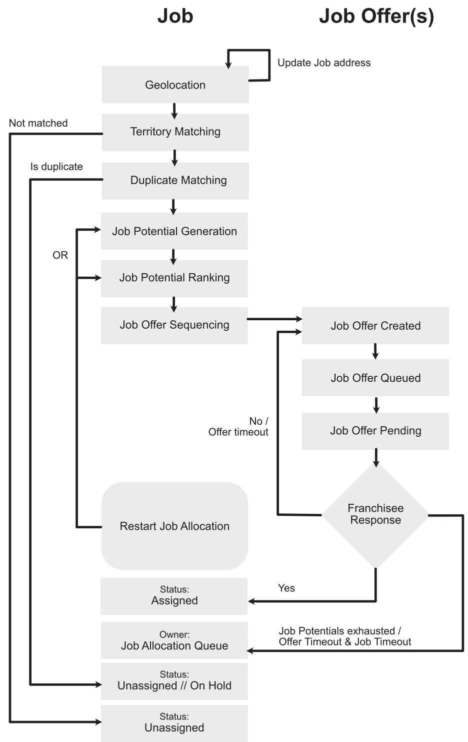
Job offers are then made to franchisees. Using the configured rule set in conjunction with the responses of franchisees, allocation to a franchisee is then made.

> 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).

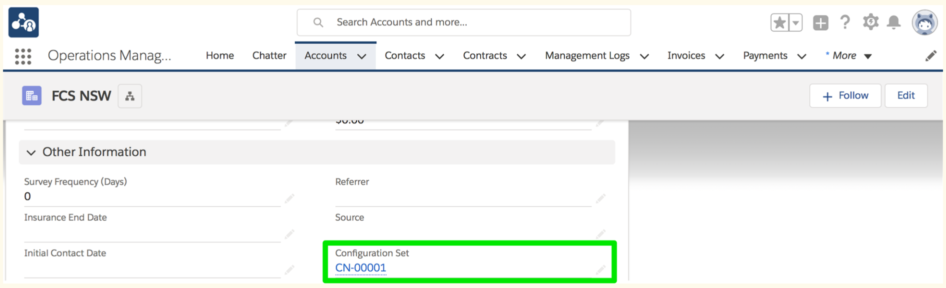




Key steps in this process are described below with respect to

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

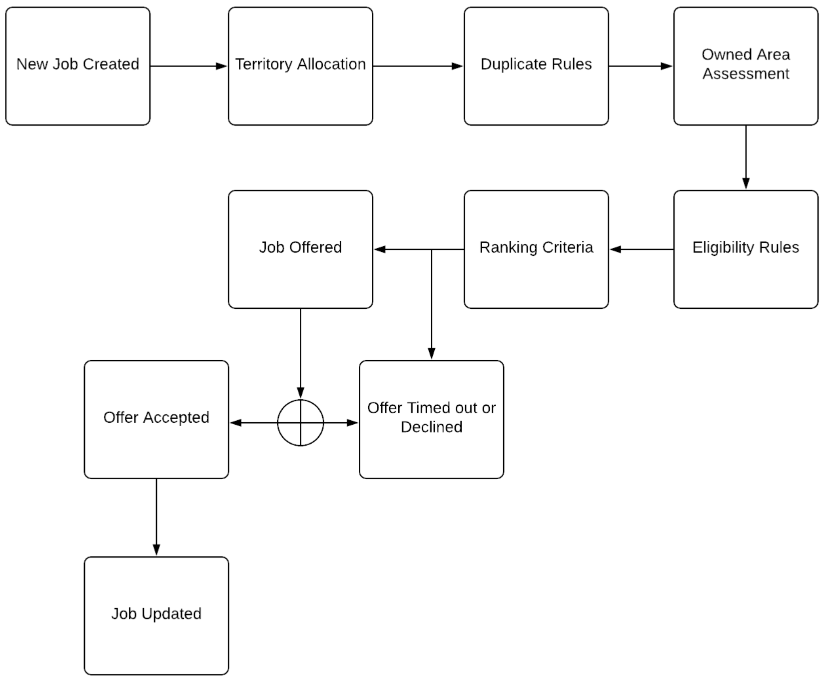
Each Master Franchise Profile Account can have its own configuration settings. This is controlled by the Master Franchise Profile Account's `Configuration Set` record.

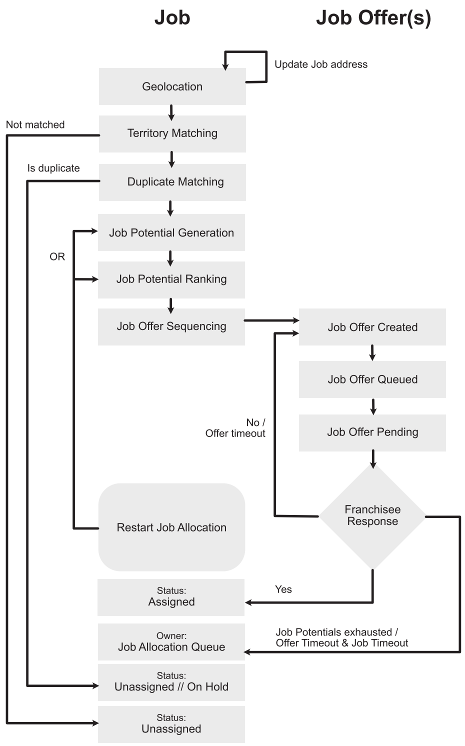


Read each of the topics below to understand how the Job Allocation System functions.

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.

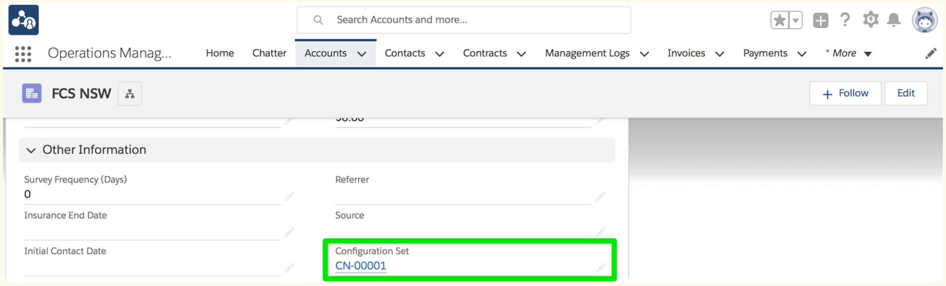




Key steps in this process are described below with respect to

- 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

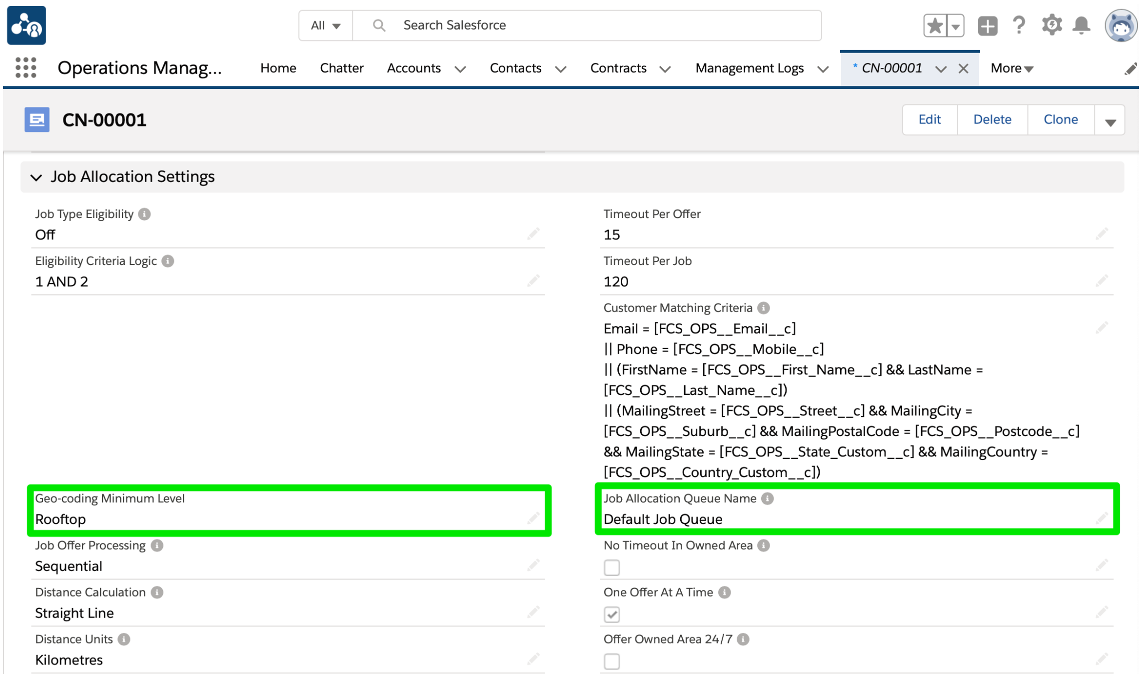
- determining which territory the geo-located job belongs to, or else
- assigning the job to the Master Franchise Profile Account's Job Allocation Queue.

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.

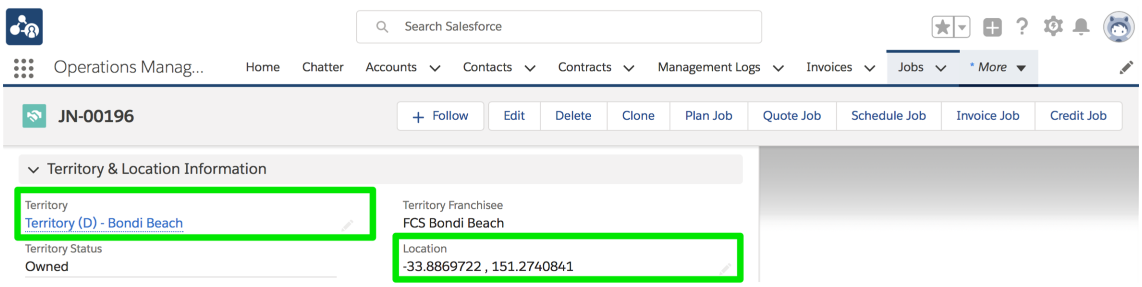
Configuration

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

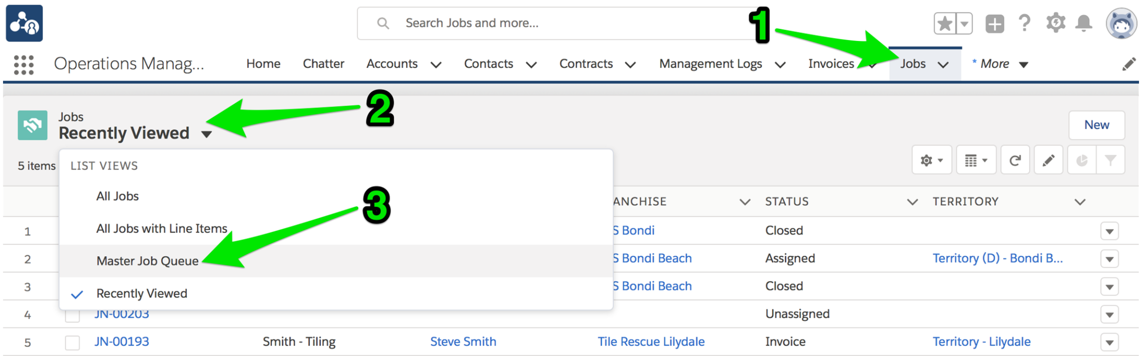


Outputs

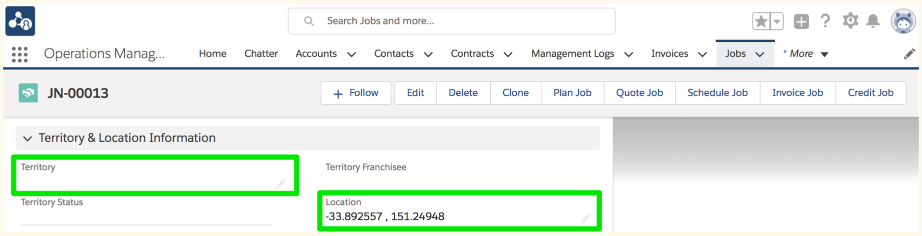
» When the suburb and postcode of the address matches a **Territory Location**, the **Territory** owning the **Territory Location** is recorded in the **Job** `Territory` field.



» 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 Salesforce**Jobs** tab.



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



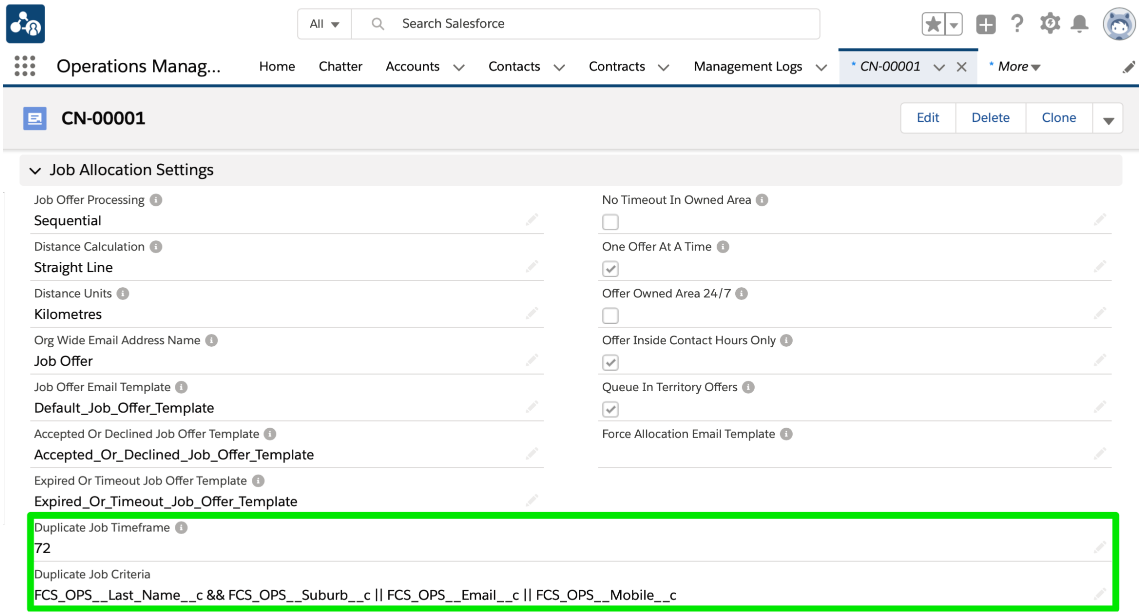
Duplicate matching

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.



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

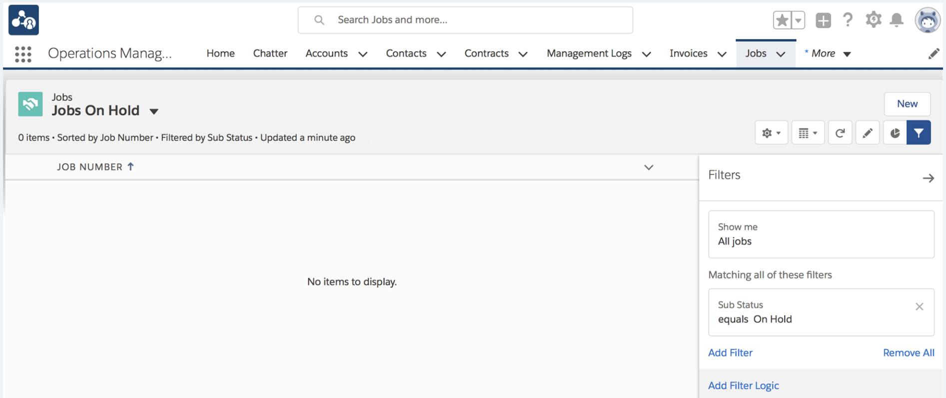
» Mobile

> 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`.

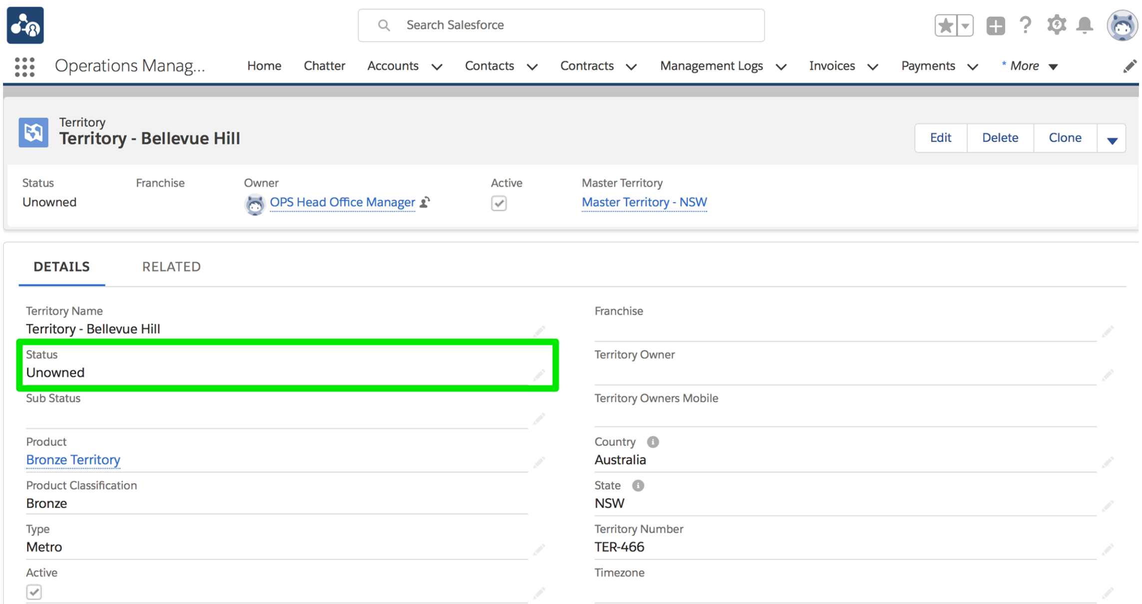


Owned area assessment

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

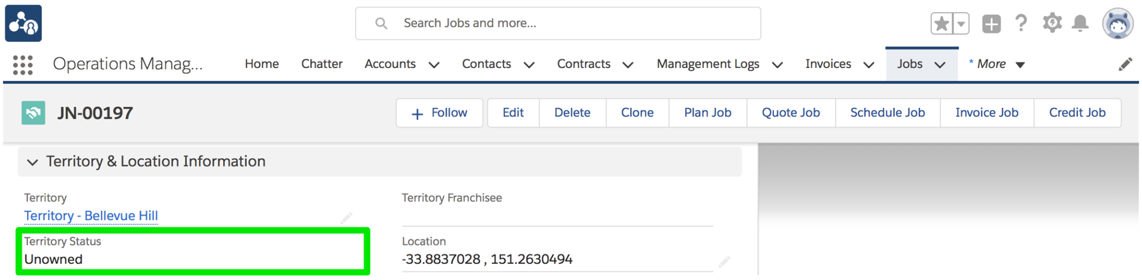
Inputs

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



Outputs

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



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.

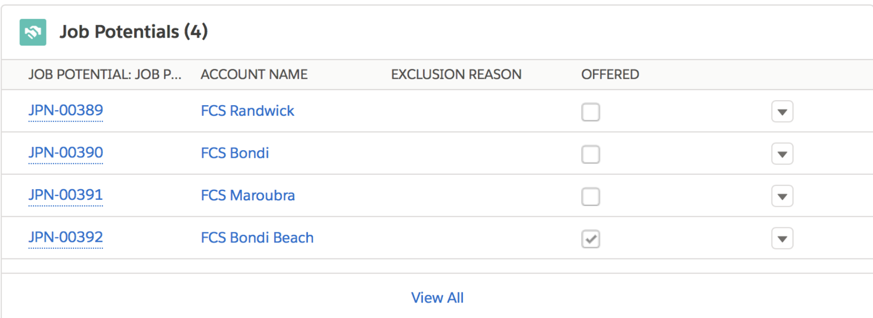
> Being added to the list of Job Potentials does not mean the Job Allocation System will make a job offer. It does mean that the franchise is further assessed to determine whether or not it will be granted a job offer.

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.



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`.

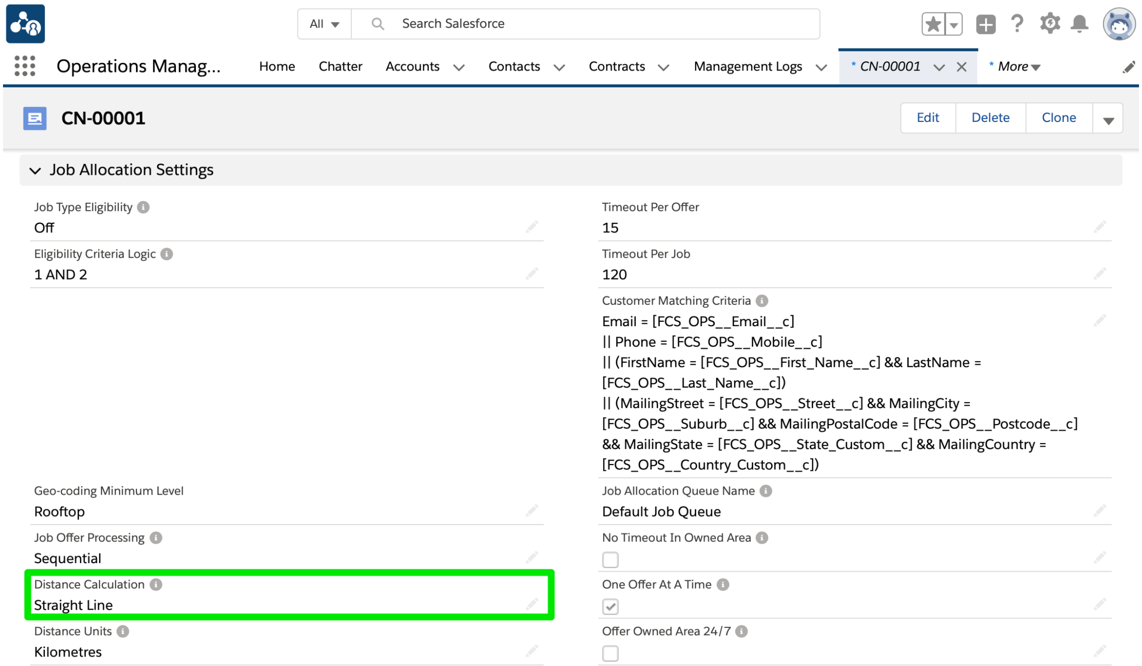
> Some jobs fall within the box calculation but fall outside the straight line calculation.

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.

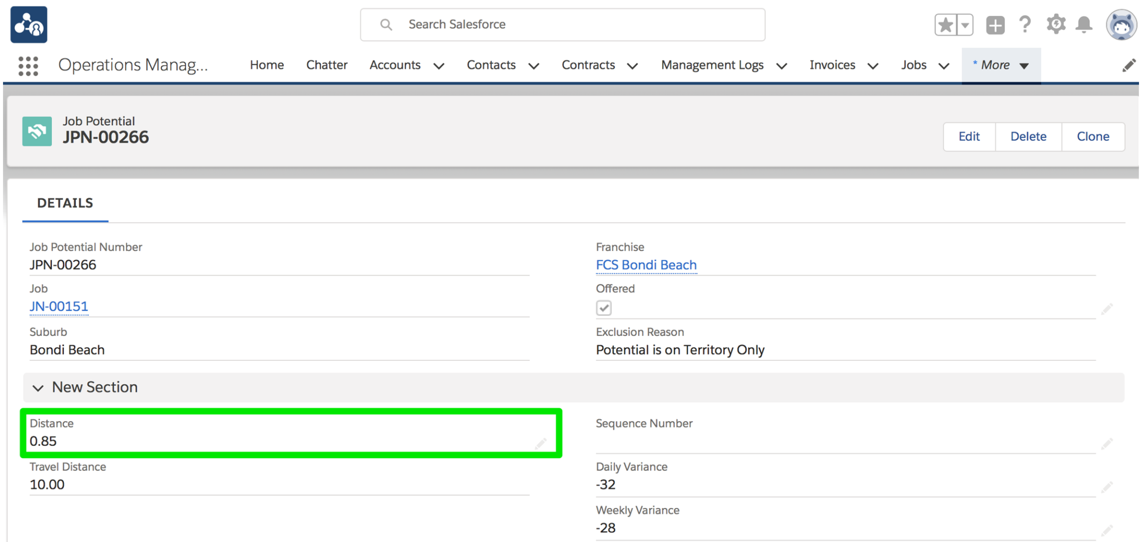
Configuration

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



Outputs

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



`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.
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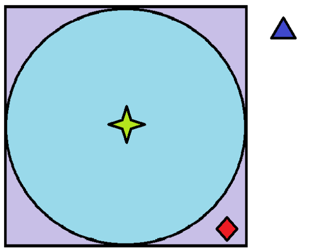

> When the system is configured to use the "by road" distance method, then the principles described above will still hold, but the "circle" will be geographically "distorted" based on road distance.

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
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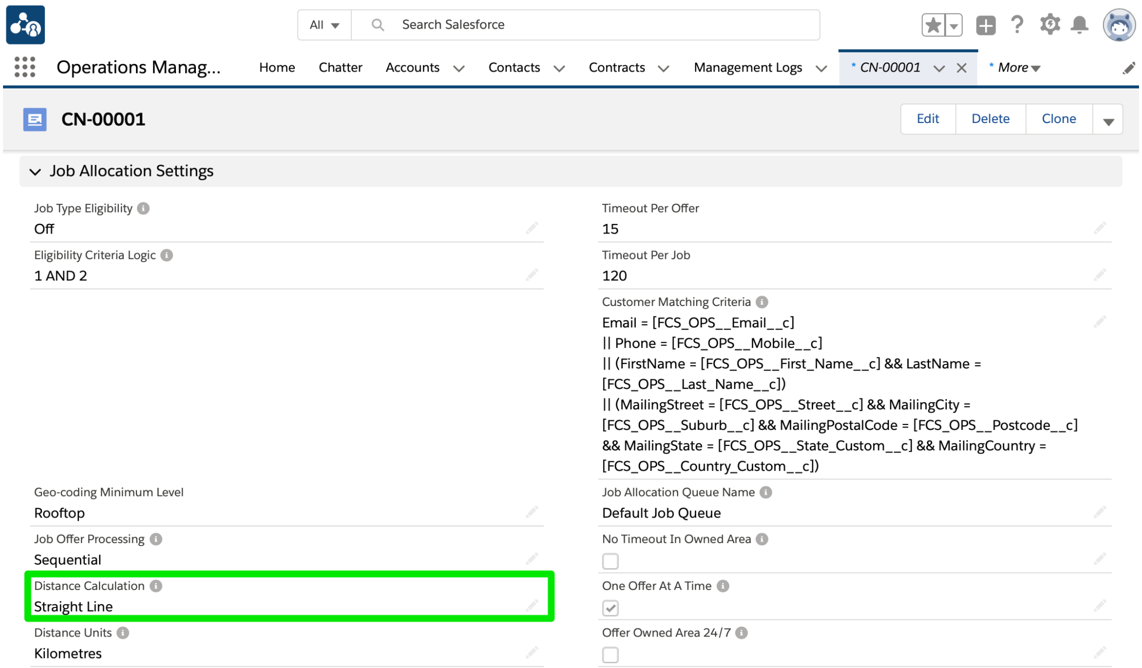
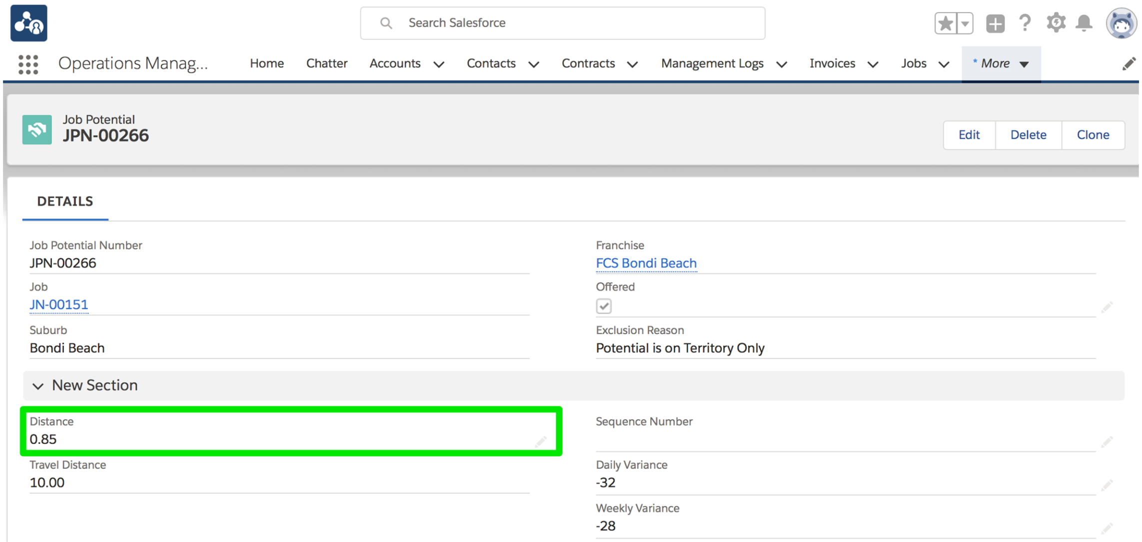


Outputs

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



> `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

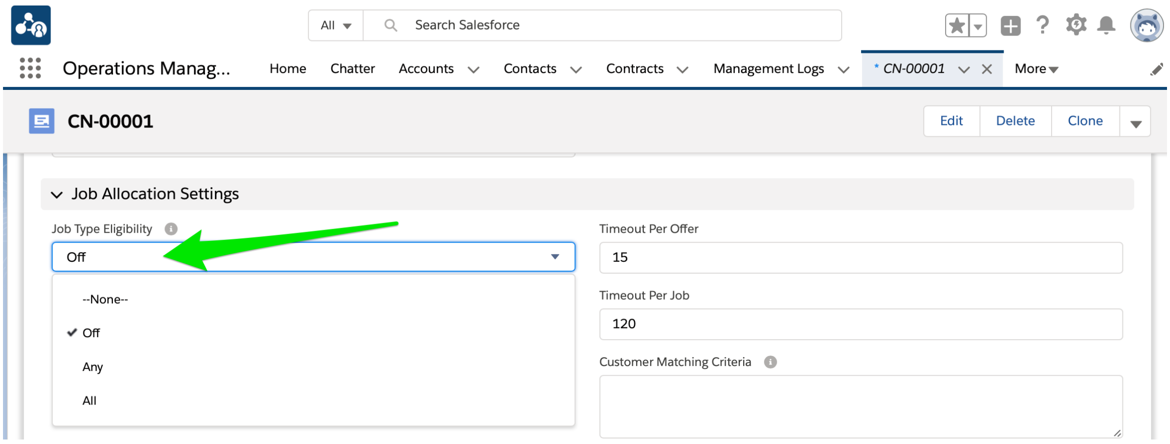
- Distance
- Job Type

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.

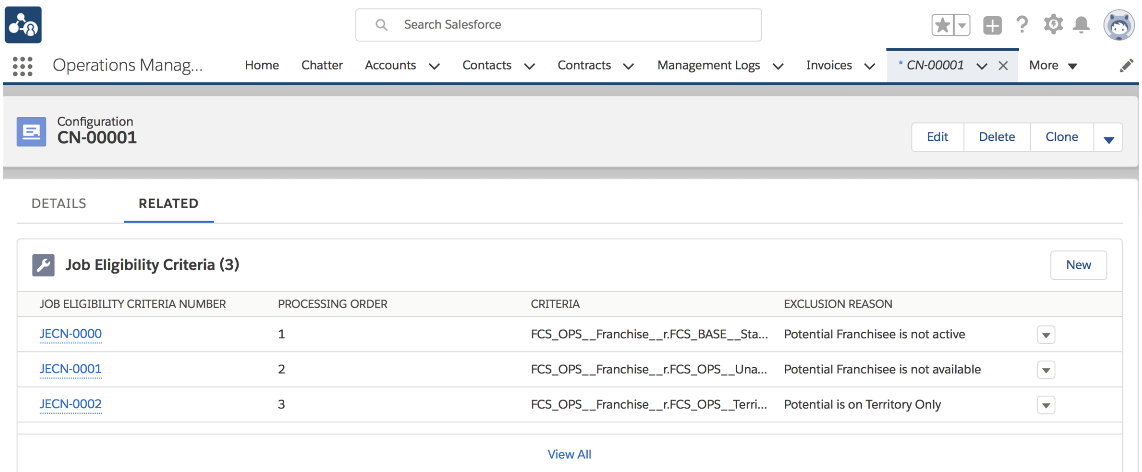


Dynamic eligibility criteria

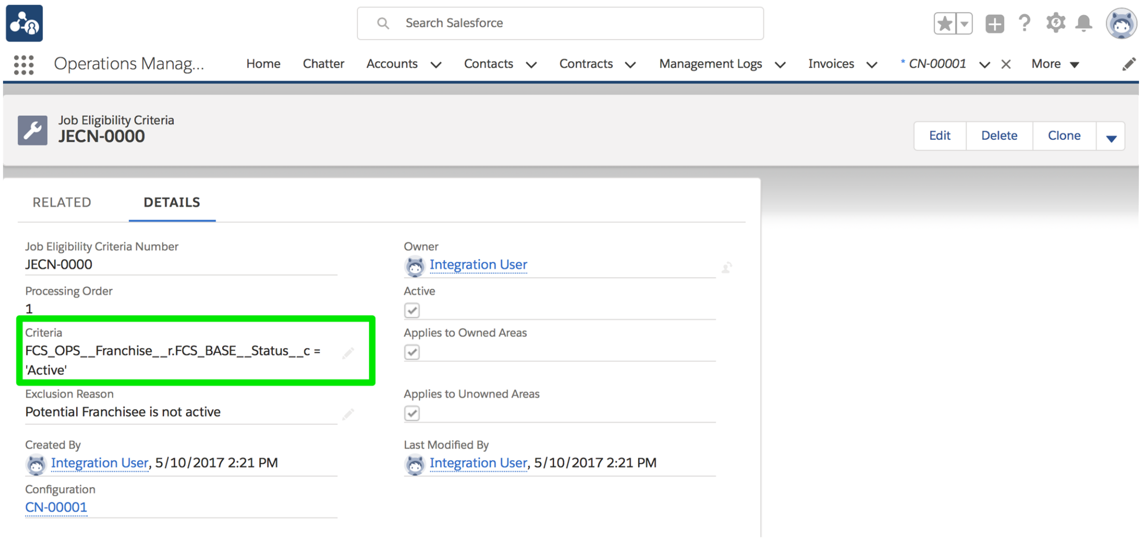
Dynamic eligibility criteria are specified through system configuration. Dynamic eligibility allows for new criteria to be configured.

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.



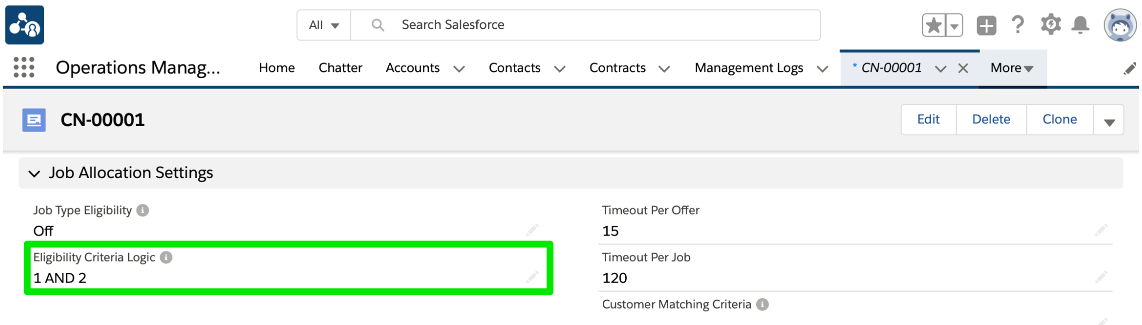
» `Criteria` is a logic statement that must evaluate to true in order for the Job Potential to be included.

» `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`*.

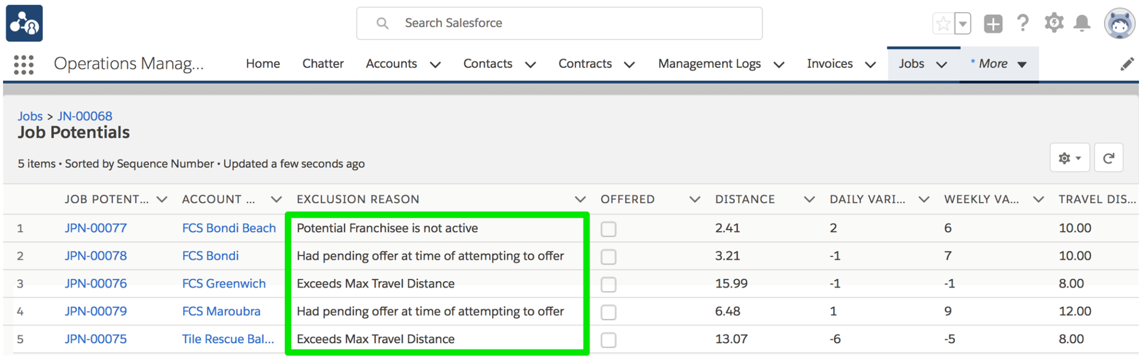
» The overall logical evaluate of **Job Eligibility Criteria** are specified using the `Eligibility Criteria Logic` field on the **Configuration** record.



» `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`.

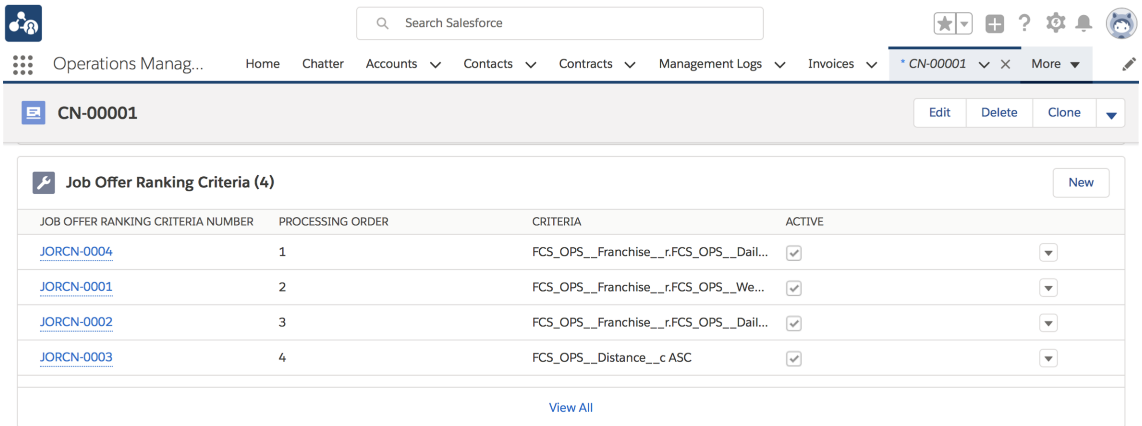


Ranking

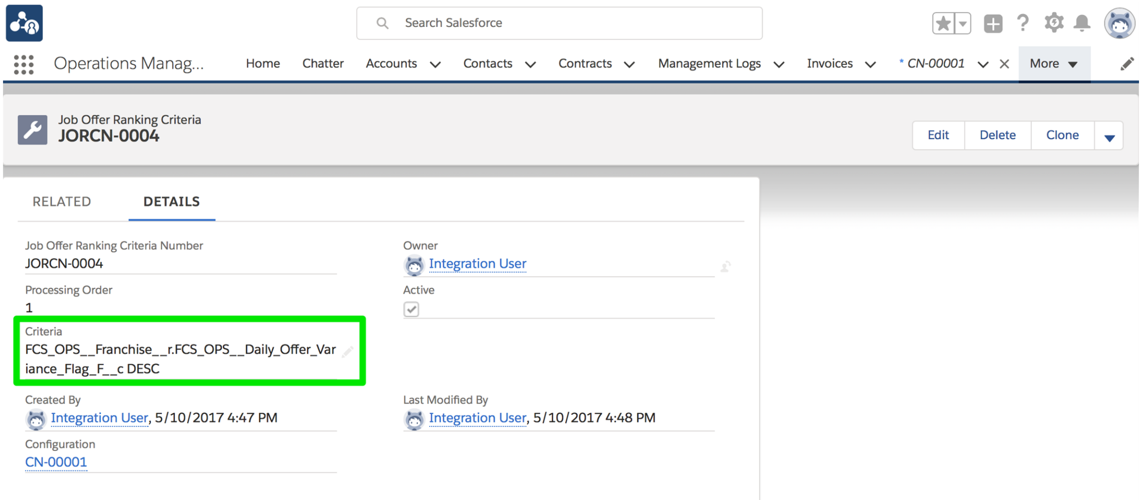
Job Potential Ranking establishes the ordering of potential Job Offers when the `Job Offer Processing` policy is *`Sequential`*.

Configuration

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



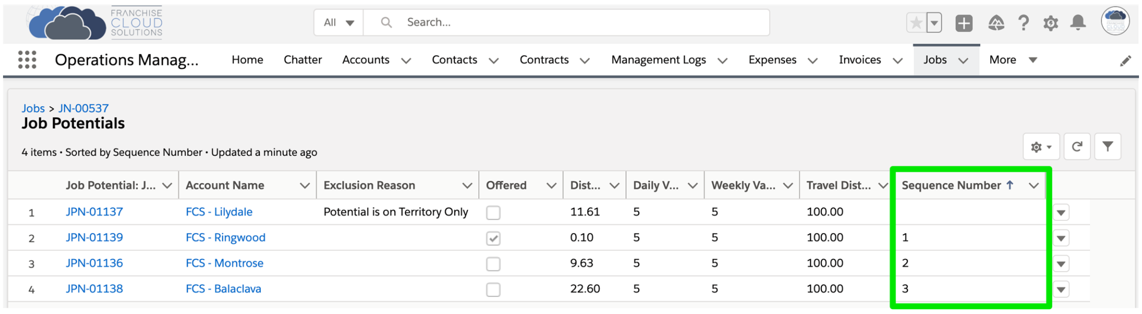
- Each ranking criteria provides a sorting rule for the Job Potentials list.



> 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.



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).

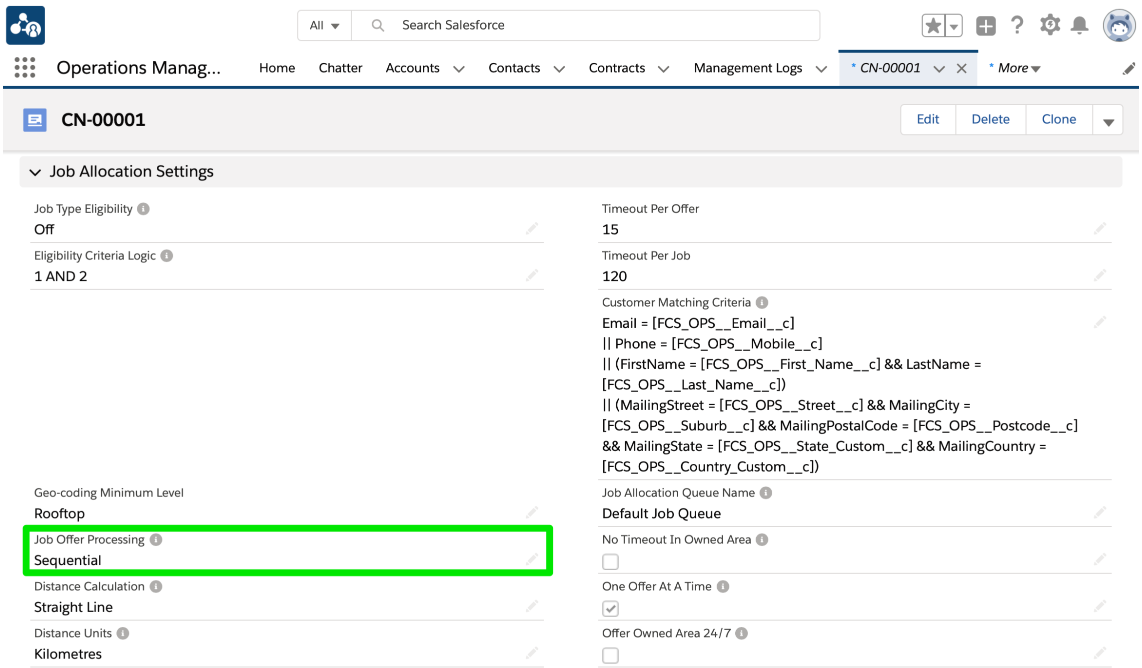
Parallel Job Offers

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.



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

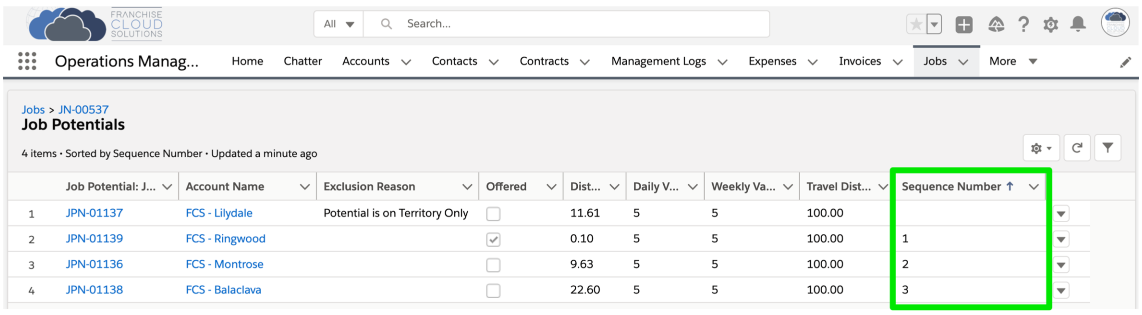
- `One Offer At A Time` prevents a Job Offer from being sent if the franchisee currently has an active job offer. When there is an active job, setting `Queue In Territory Offers` sets the Job Offer `Status` to *`Queued`*. Setting `Queue In Territory Offers` to *`False`* causes the job to be offered to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

> 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.

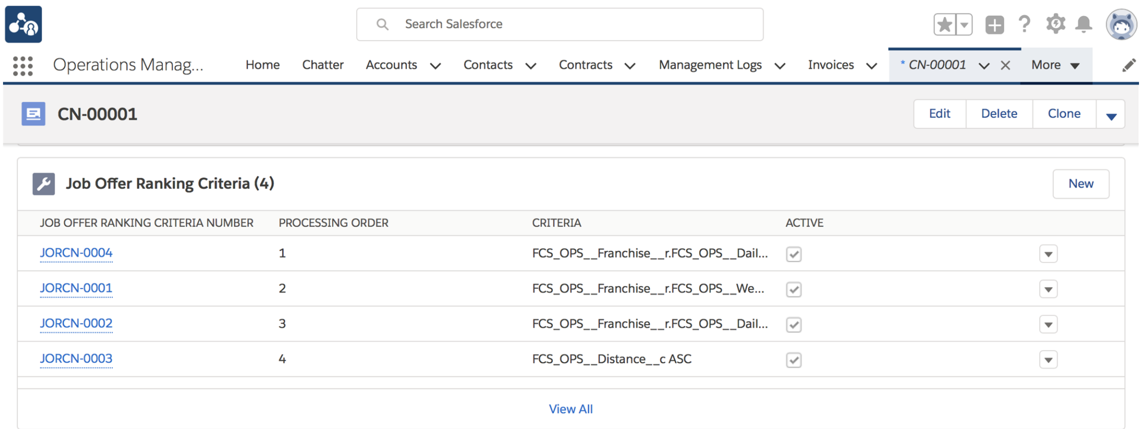


Job potential ranking

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.



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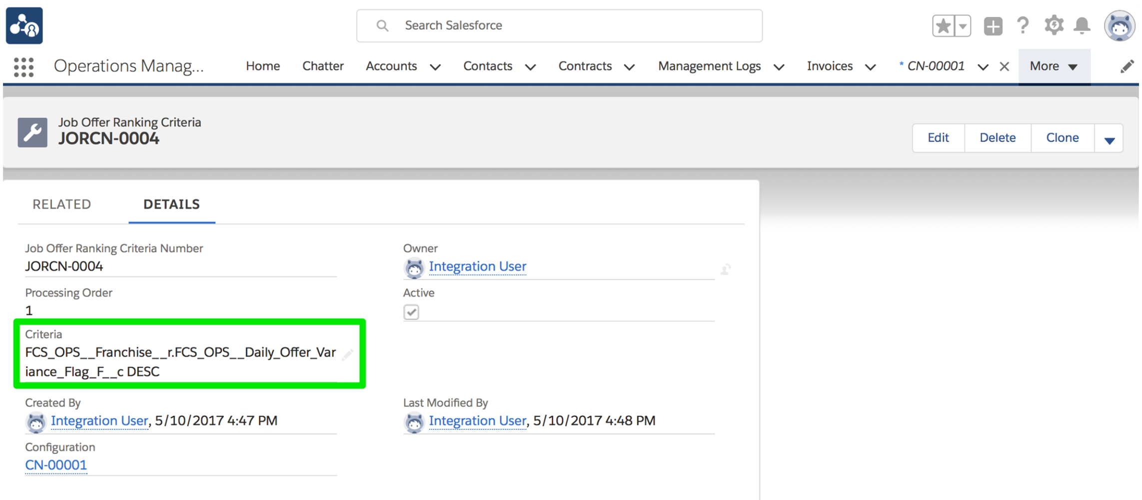
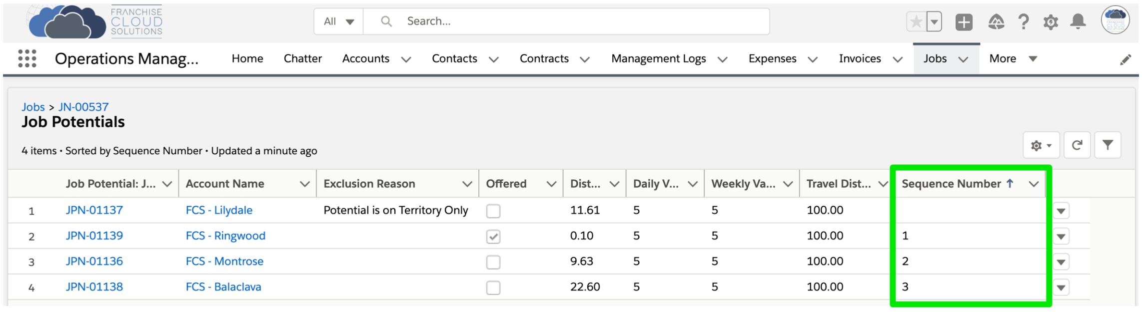


> Think about each Job Offer Ranking Criteria as contributing a sort condition on a specific field, similar to a SQL Order By clause.

Outputs

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



Distributing job offers

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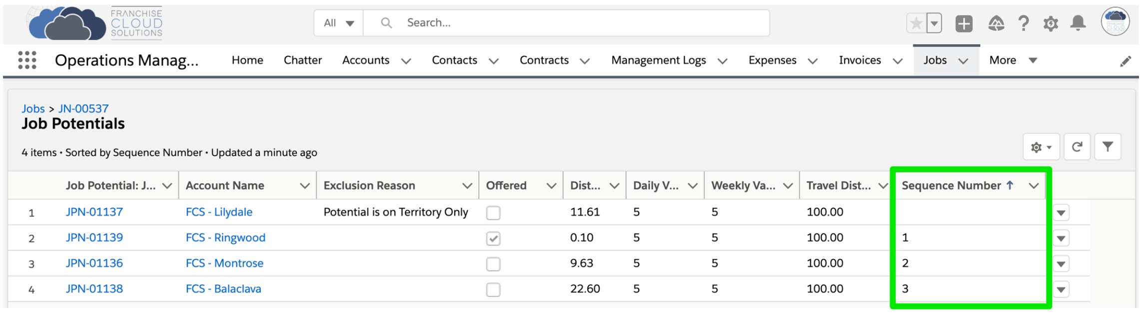

Why some franchisees are excluded by max travel distance criteria?

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.

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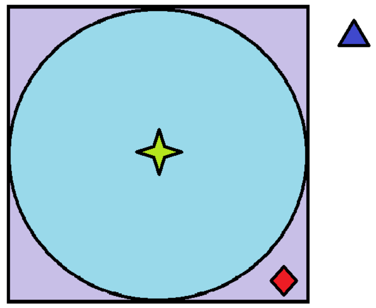

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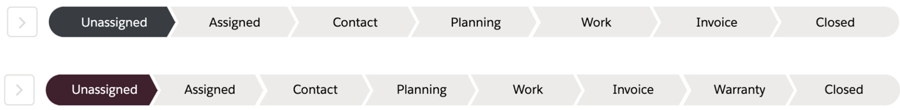
Jobs will never be offered further than the `Max Travel Distance` when the by road distance method is configured.

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.

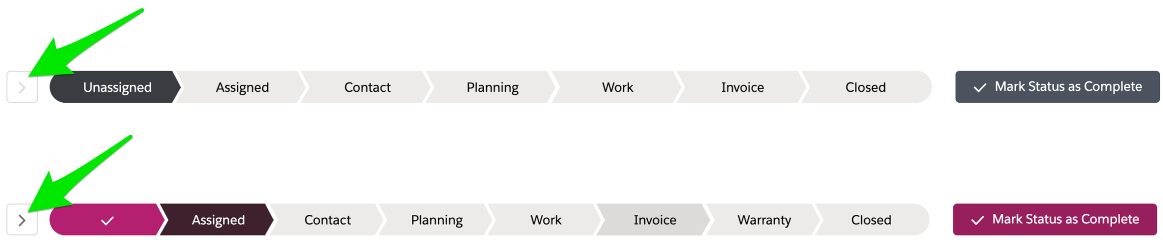
> For example, creating a Job Plan automatically places the Job's `Status` into *`Planning`*.

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

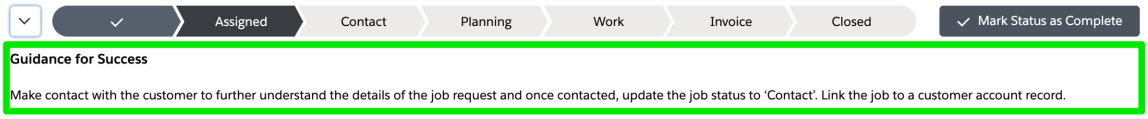
> For example, if you have Contacted the customer, you need to record the outcome of the contact using the Substatus fields. It allows you to describe whether the contact was Attempted, Successful, On Hold, or whether there is a Pending or Completed Site Visit.

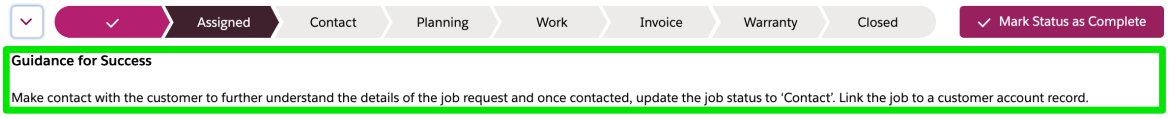
Guidance for success

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	Job is newly created and has not yet been assigned to a Franchisee. This status is now obsol-escent. Queued for Allocation is used in its place.
	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, wait-ing 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 cus-tomer.
	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	The Job has been temporarily placed on hold for a range of reasons that prevent it proceeding. For example, the customer may be out of town or otherwise unresponsive to contacts. (When it is clear the Job will never proceed, change status to `Closed: Not Proceeding`.)

Job Status	Substatus	Transition	Description
Planning	In Progress	Auto	**Job Planning causes transition.** 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	**Quote Job, Email Send causes transition.** 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
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	Completed	Manual	Switch to this Substatus when you have completed the Job Planning process.
	Quote Sent	Auto	**Quote Job, Email Send causes transition.** When you have sent the Quote, system will switch to this Substatus.
	Quote Callback	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	Indicates work is being delayed. Reasons include: » Waiting for a deposit » Waiting on material or a signature Selecting a Substatus Reason is mandatory.
	Scheduled	Conditional	Work is scheduled. Automatic transition occurs if the Estimated Hours match Scheduled Hours with 1 hour of variance. Otherwise manual.
	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. This status not used when Franchise Profile Account's `Auto Close Job on Final Payment` is checked.
	Dispute	Manual	Customer is disputing the invoice.
Warranty	Pending	Manual	Pending warranty have two Sub Status Reasons » Material and Signature » Waiting on Deposit
	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

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

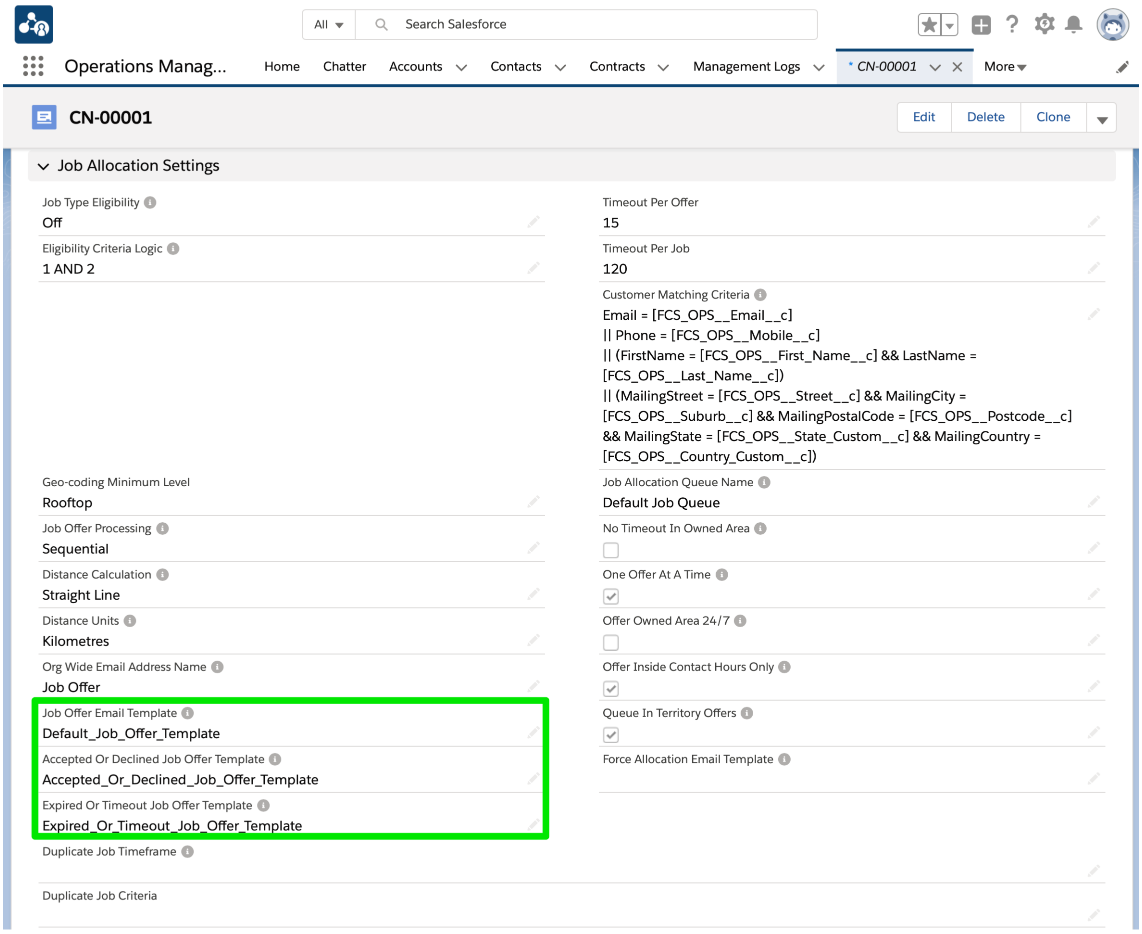
- `Job Offer Email Template`
- `Accepted or Declined Job Offer Template`
- `Expired or Timeout Job Offer Template`

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**.



CHAPTER 9

Working with SMS Reminders

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 blockout 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 blockout period

There is a reminder blockout 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 blockout 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.

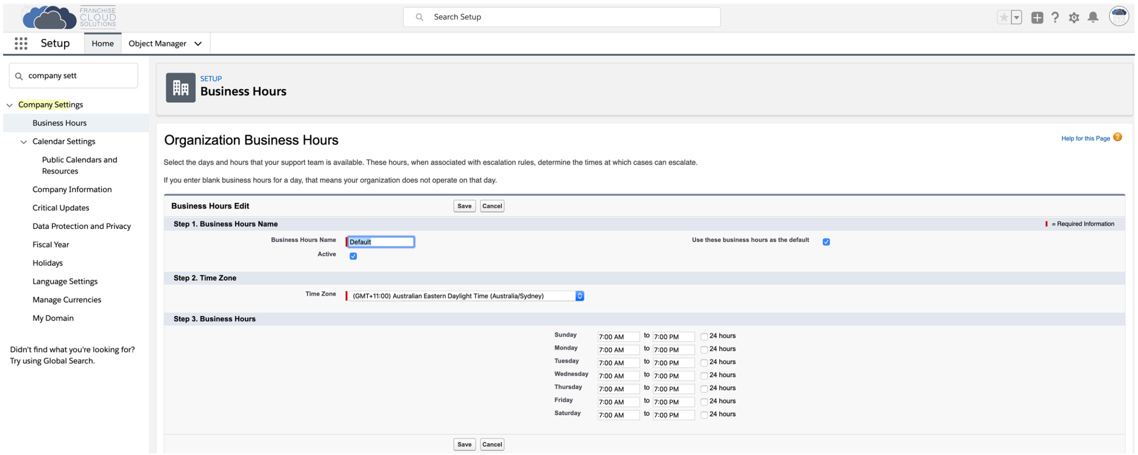
> SMS Reminder templates are configured in their respective SMS Reminder Journey.

How to configure the SMS publishing window

The SMS publishing window is set globally for the system. By default, SMS Reminders can be sent 24×7. 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.



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

How to configure the reminder blockout period

The reminder blockout 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 blockout period

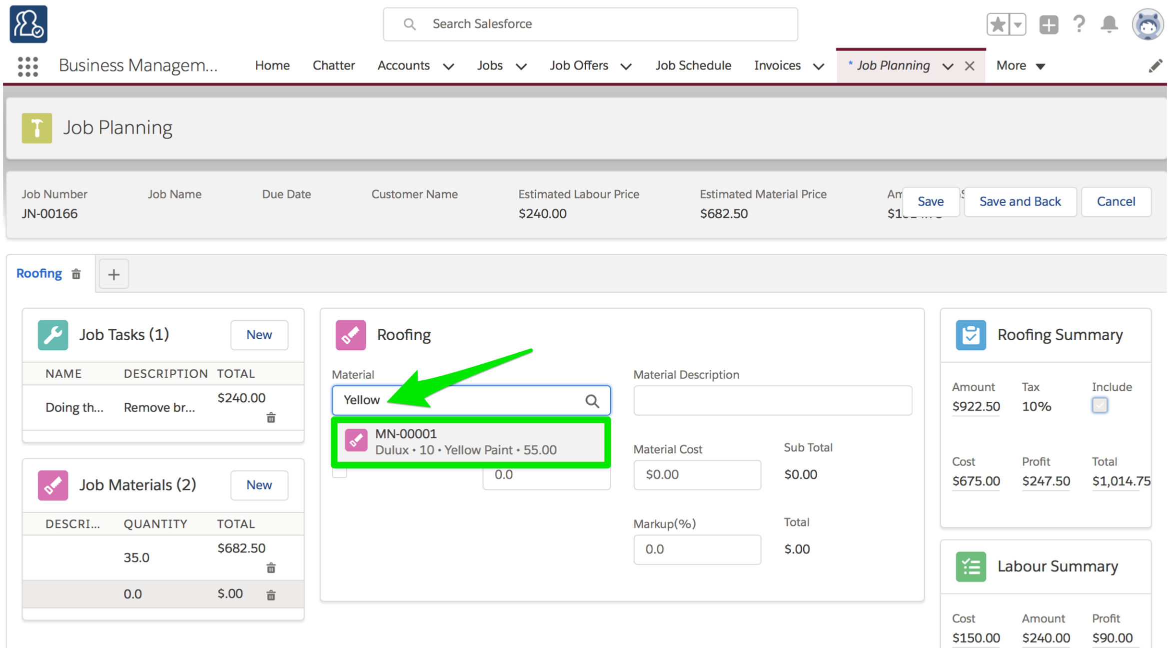
CHAPTER 10

Working with Material Price Lists

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.



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.

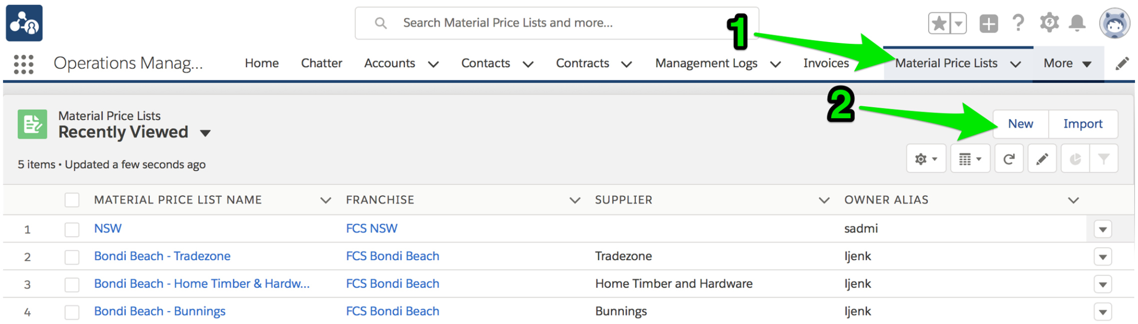
Creating a material price list

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.

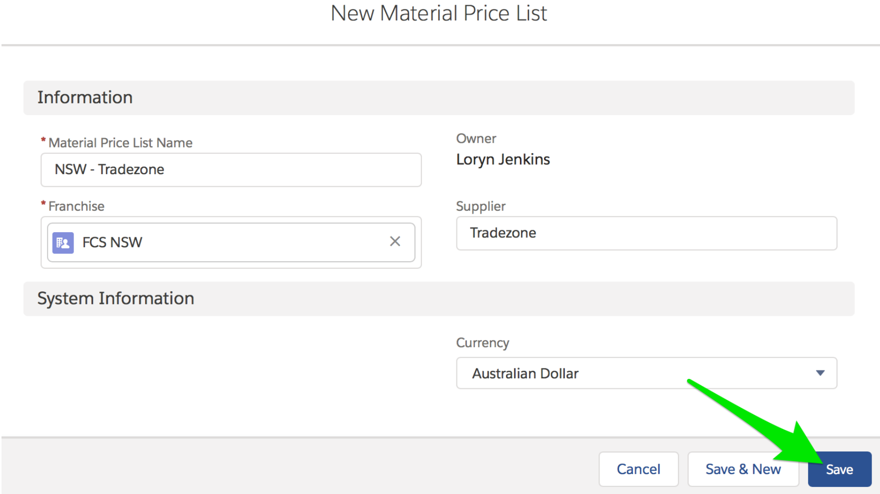
To create a price list

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

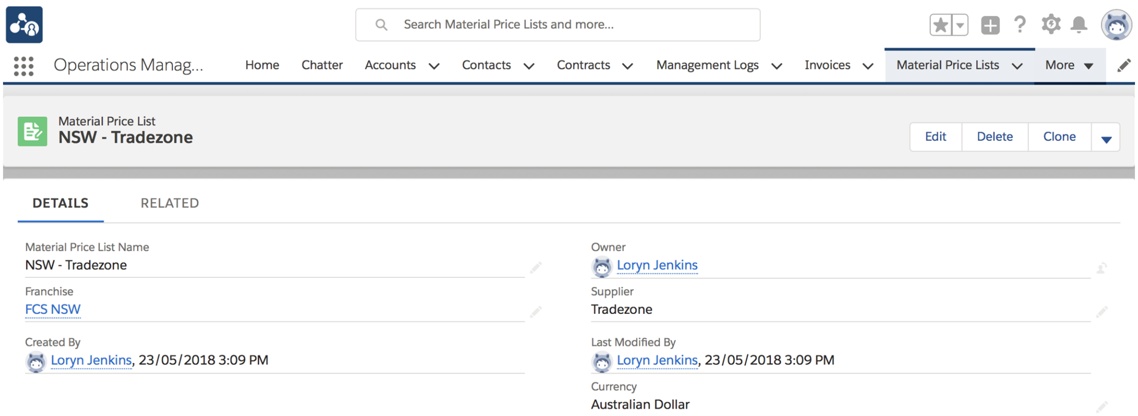


The **New Material Price** list dialog box displays.

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



The new price list displays.

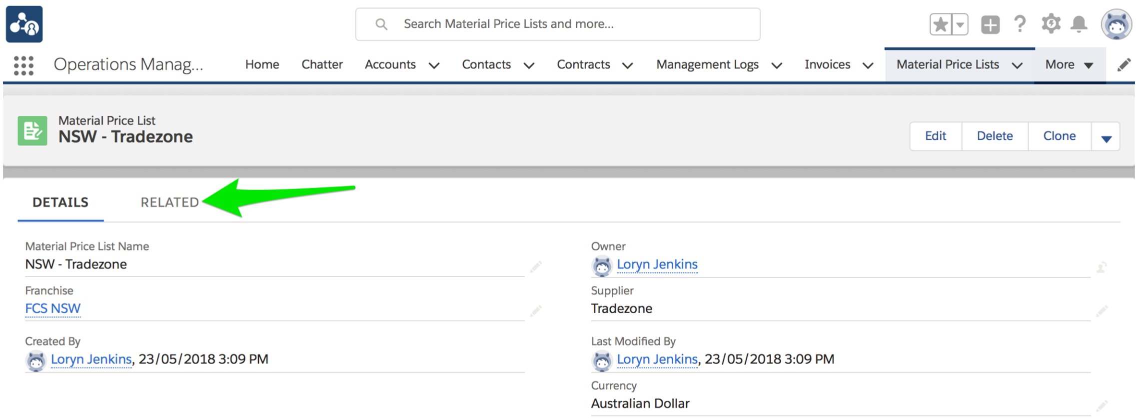


Adding a material

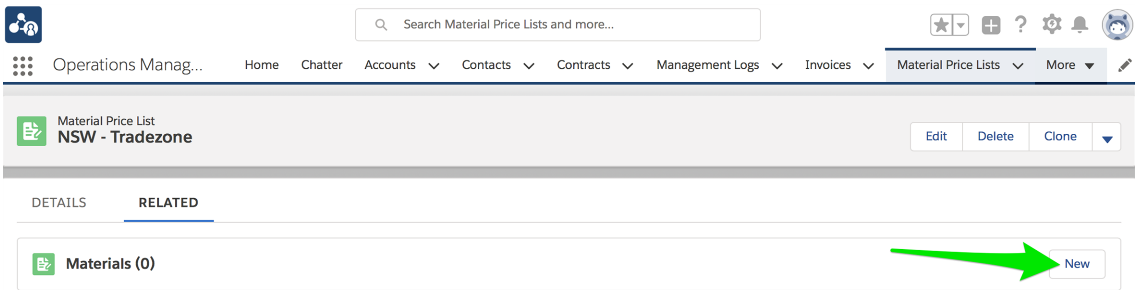
Once you have created a price list, you will want to add the most commonly purchased items from that supplier to the price list.

To add a material to a price list

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

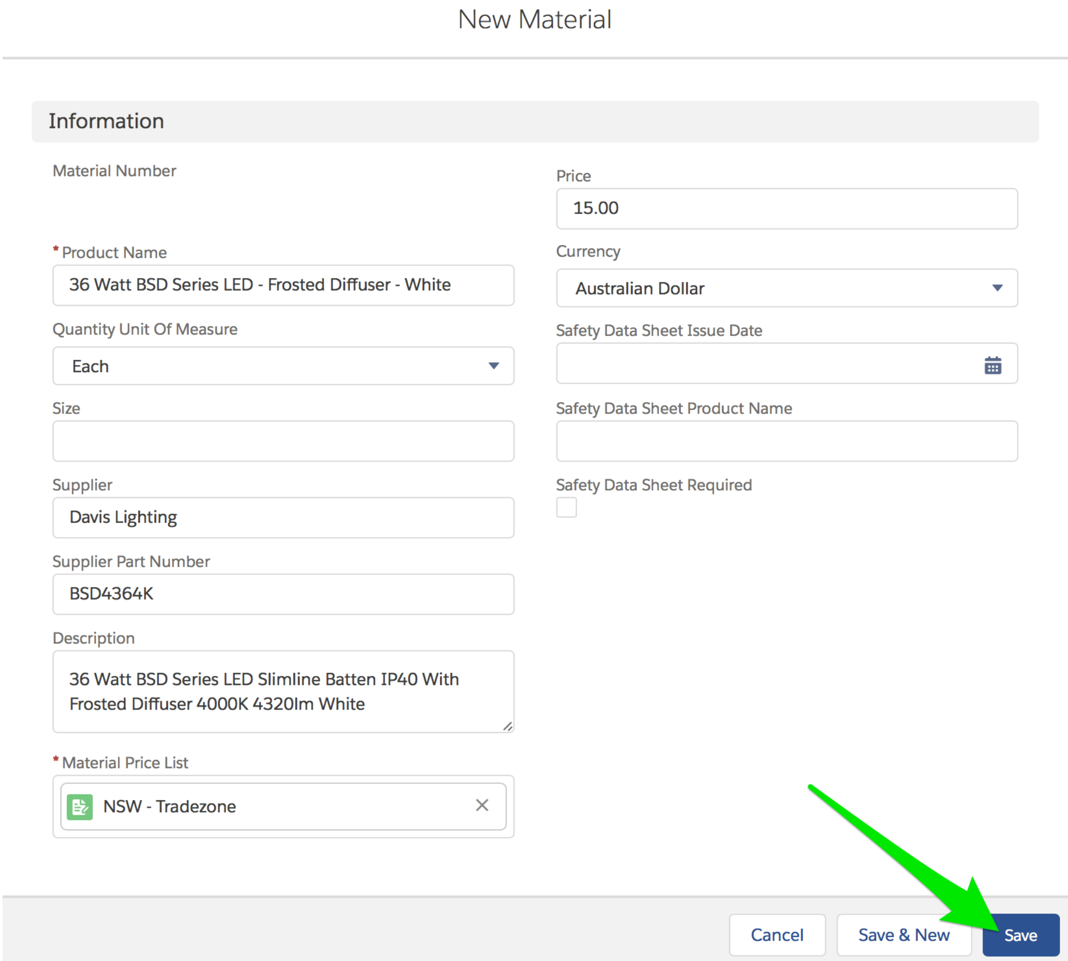


2. From the **Materials** section, press **New**.

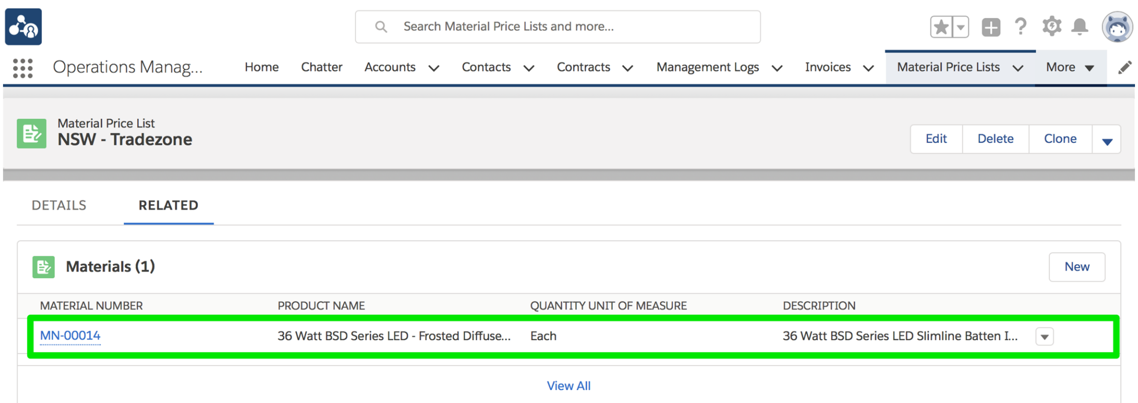


The **New Material** dialog box displays.

3. Enter all the relevant material details.



The new material record is added to the price list.



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

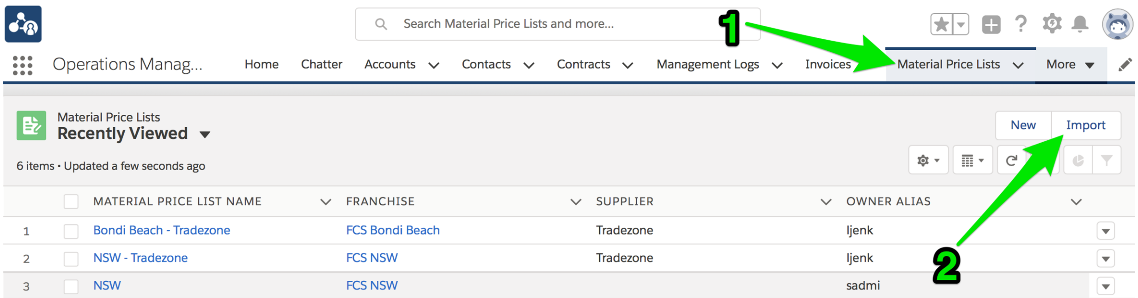
Importing and updating material price lists from a spreadsheet

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.

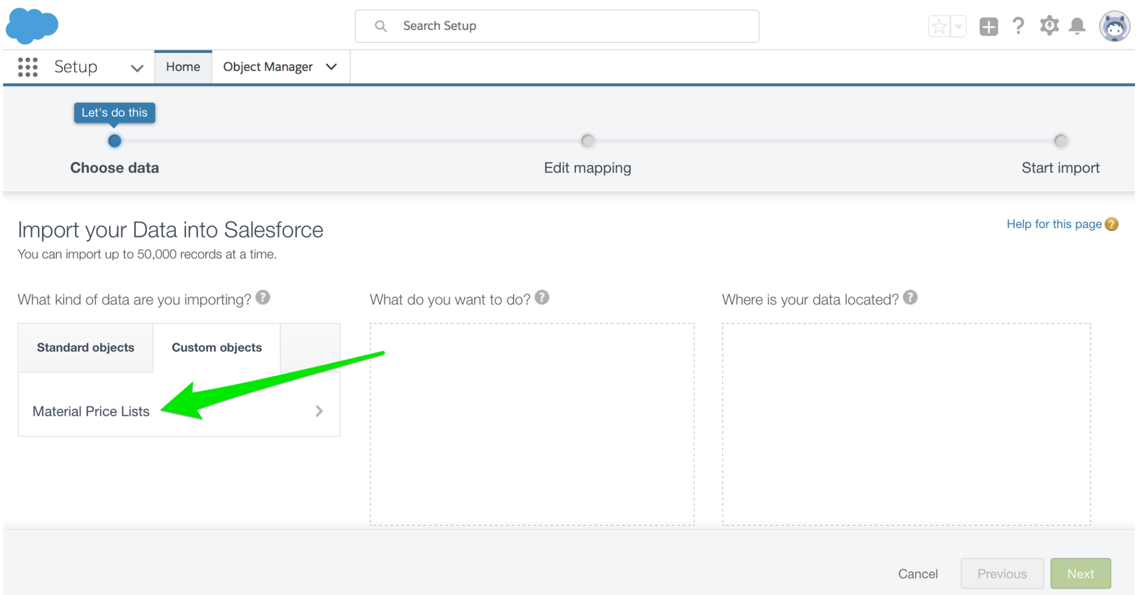
   > It is helpful to generate a template with the right headers already defined. You can use the template to create your price list in a spreadsheet, and then import the spreadsheet into Salesforce.
   >
   > Refer to Salesforce Knowledge Base Article, [Create an import template file which will create all the header definitions as defined by Salesforce](#).

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



   The Salesforce Data Import Wizard displays.

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



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

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.

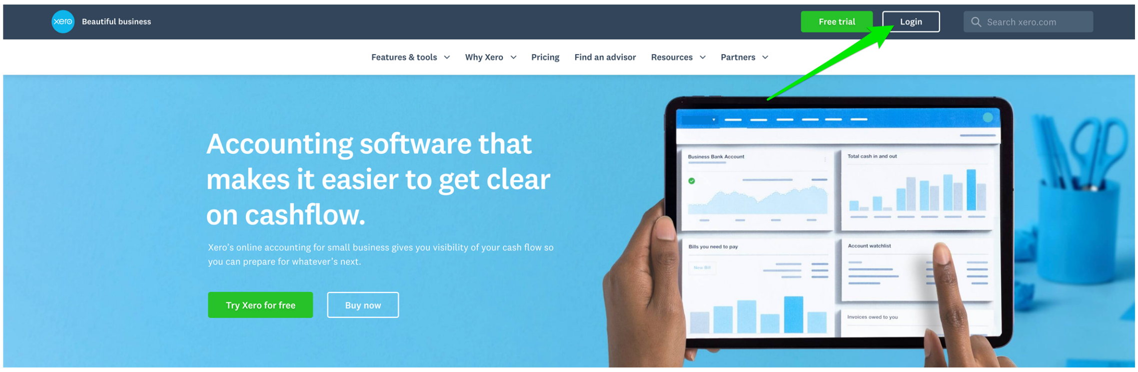
To connect your Master Franchise Profile Account to Xero

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

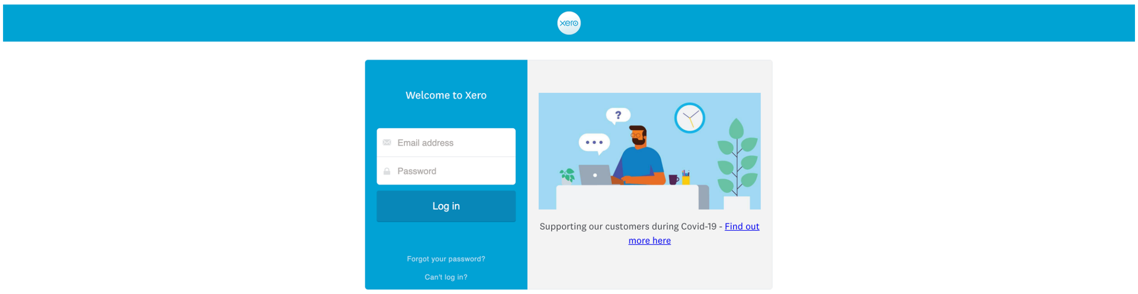
How to do this is described below.

To login to Xero

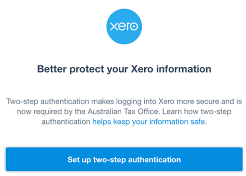
1. Go to the Xero website www.xero.com.au and click the **Login** button.



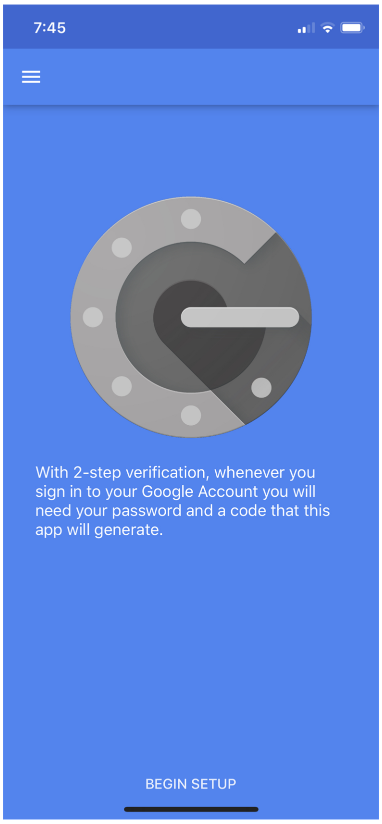
2. Now enter your `Email address` and `Password` then press **Log in**.



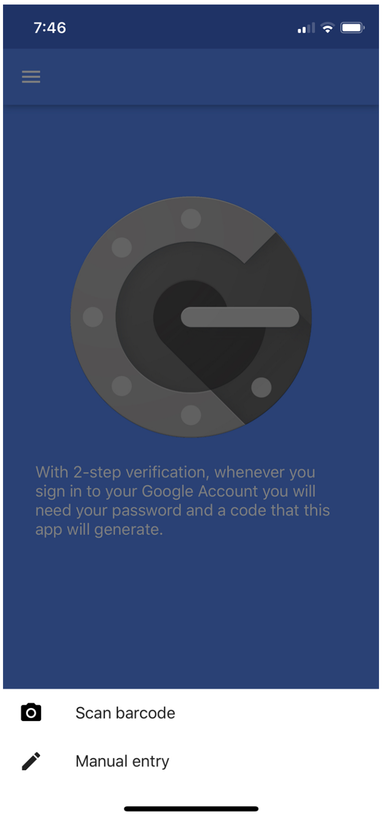
3. Xero may prompt you to set up two-step authentication. Press **Set up two-step authentication** to continue.



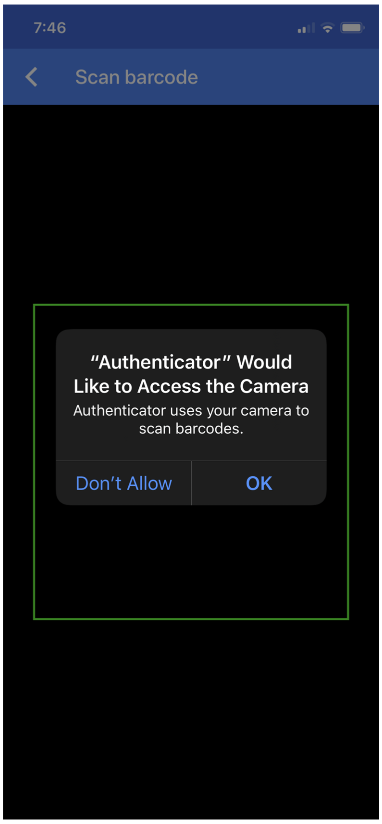
4. If you don’t already have the Google Authenticator app on your mobile phone, go to the App Store (for iPhone) or Google Play (for Android) and download the Google Authenticator app.



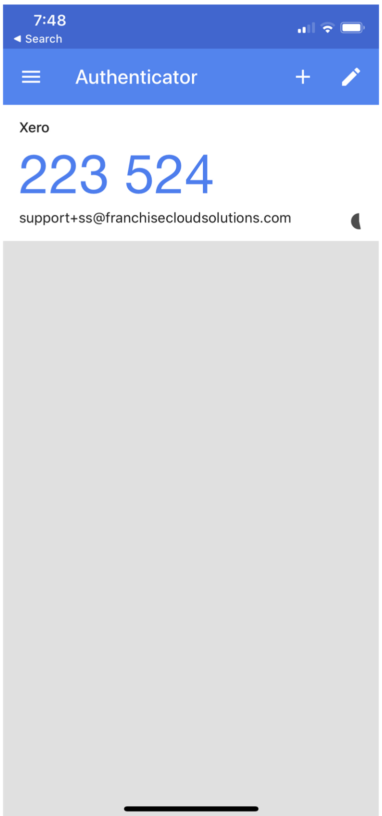
5. If this the first time you've used Google Authenticator, tap **Begin Setup** (otherwise, tap the **+** button) then tab **Scan barcode**.



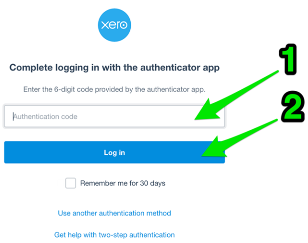
6. If this is the first time you've used Google Authenticator, you may need to grant permission to use your camera. Press **OK**.



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.



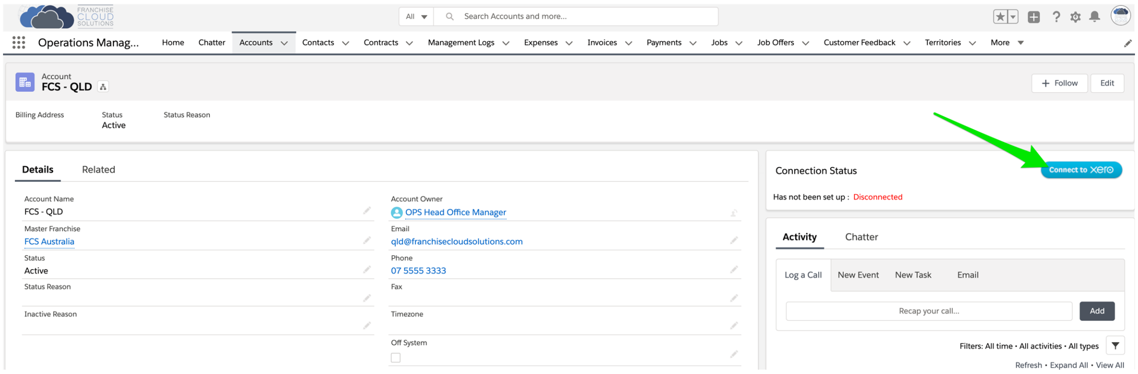
8. Enter the six digit code and press **Log in**.



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

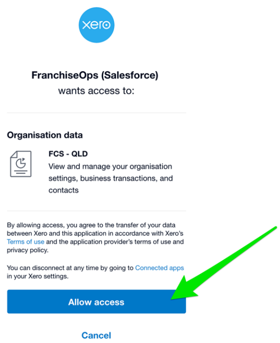
To connect to Xero

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



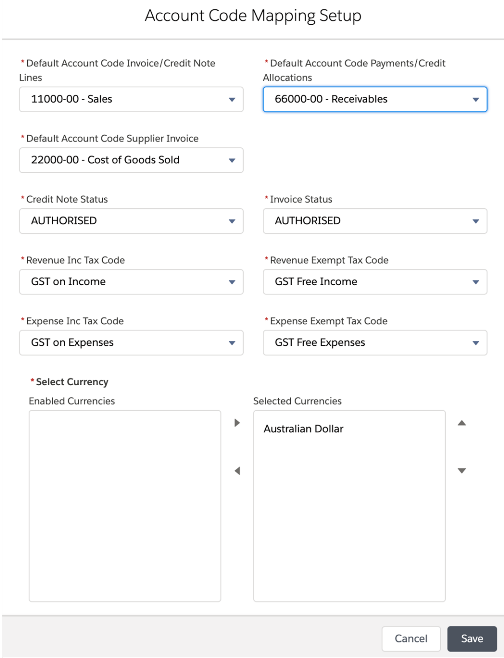
The **Welcome to Xero** login page appears.

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.



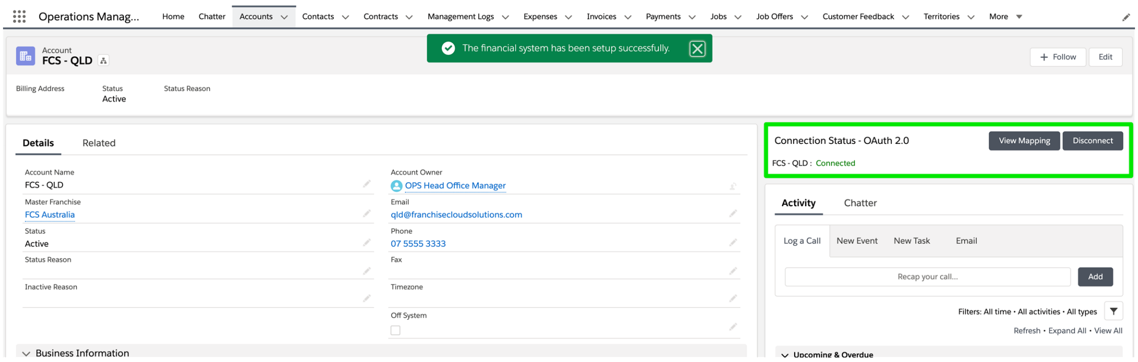
Your **Master Franchise Profile Account** displays and the **Account Code Mapping Setup** dialog box appears.

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



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.



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.

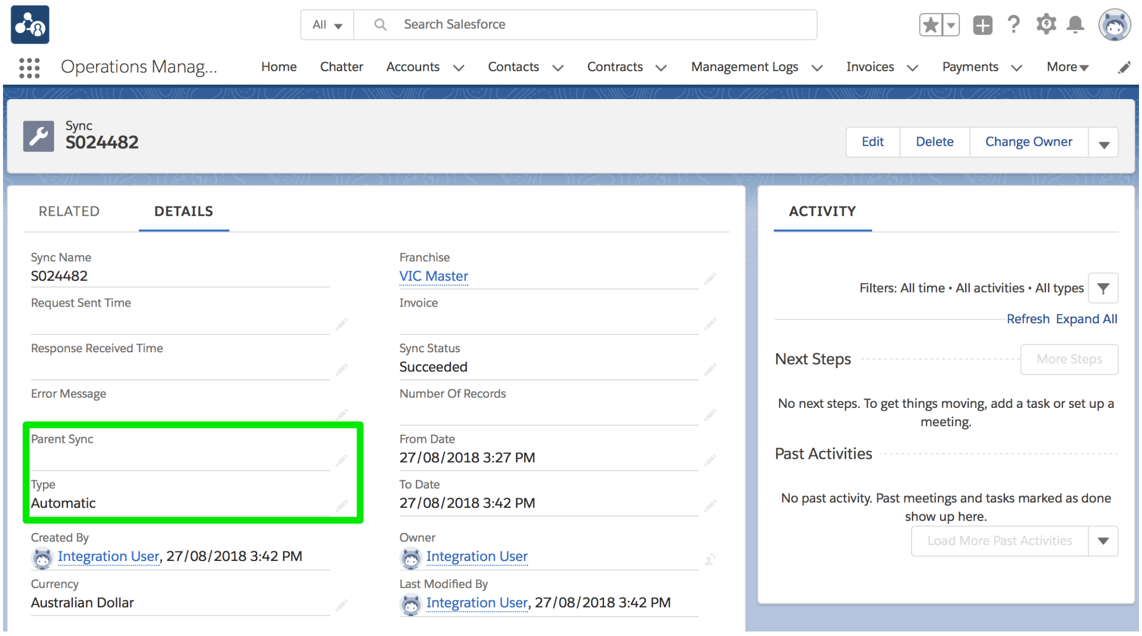
The following table describes the meaning of each sync status.

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

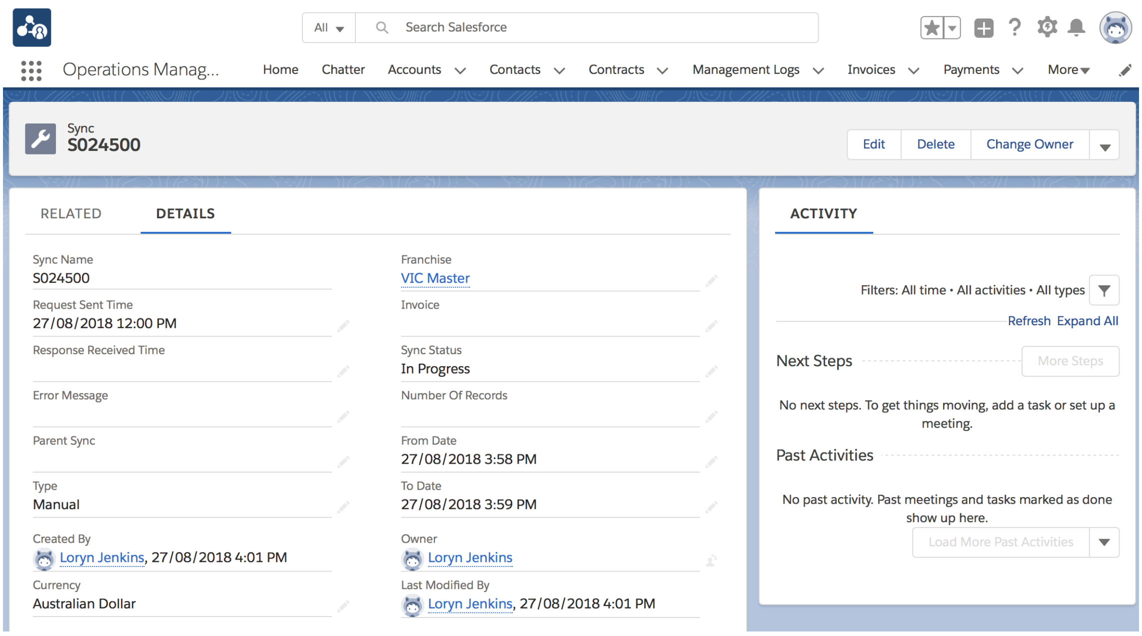
There are three types of Sync records.

» Automated Sync Request records.



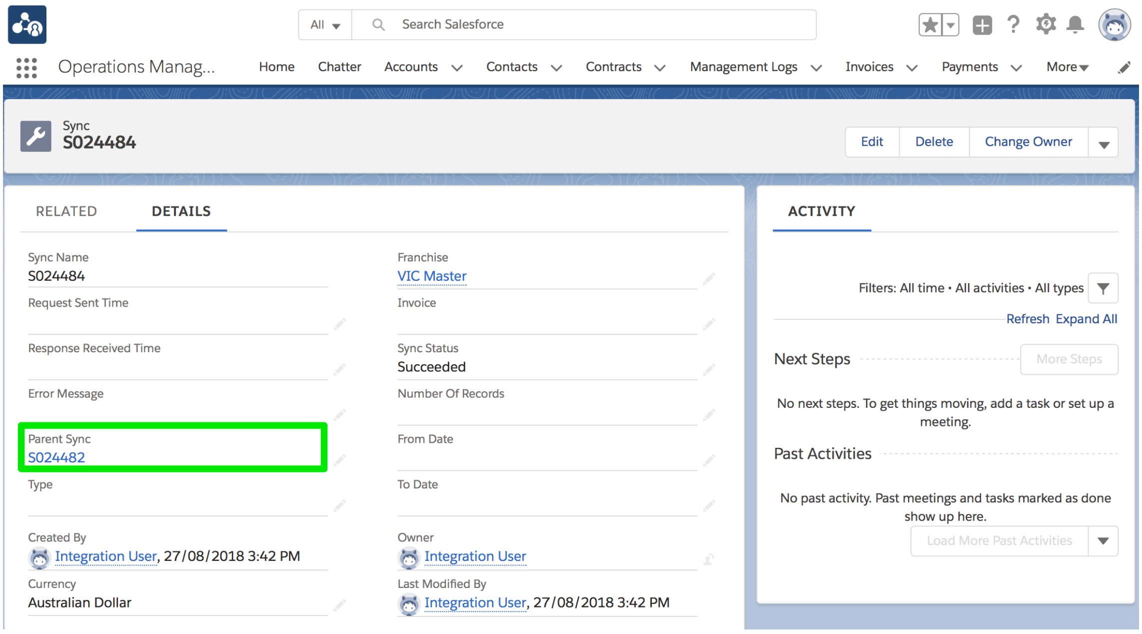
These are the automatic syncs that occur on the schedule set in the Master Franchise Profile Account. They have no parent. You recognize an automatic Sync by looking at its `Type`. You recognize it as a Request record by observing that the `Parent Sync` field is empty.

» Manual Sync Request records.



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

» Child Sync Response records.



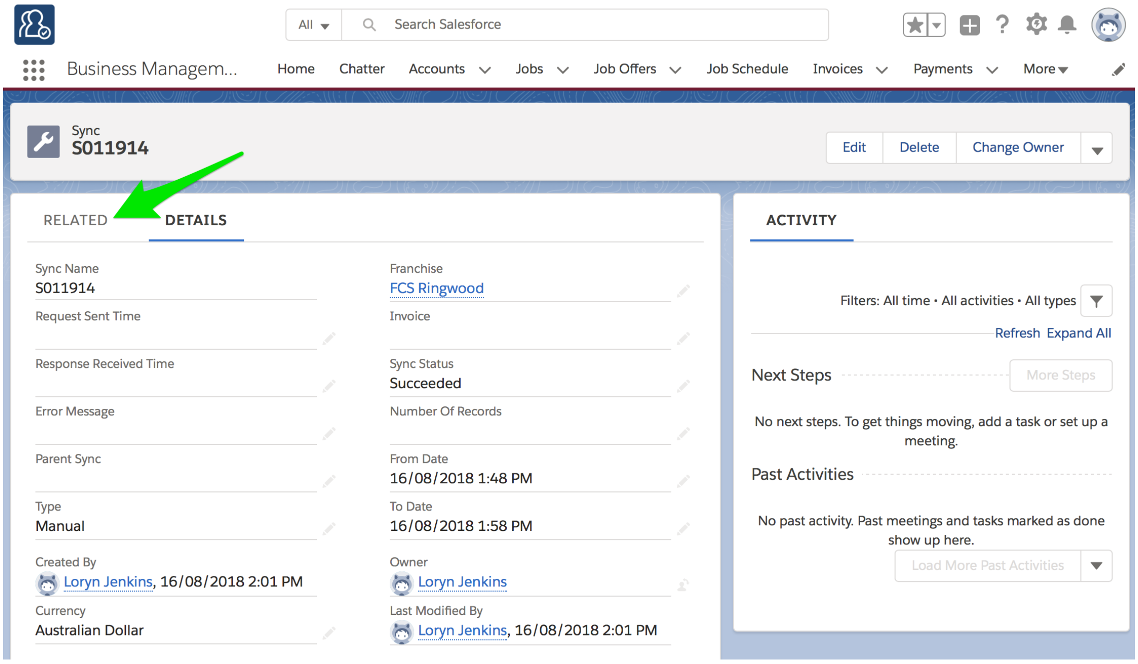
Each Request record has one or more child Response records associated with it. Each Response record is a child of the Request record. You recognize a Response record because it has the name of its parent within the `Parent Sync` field.

Sync attachments

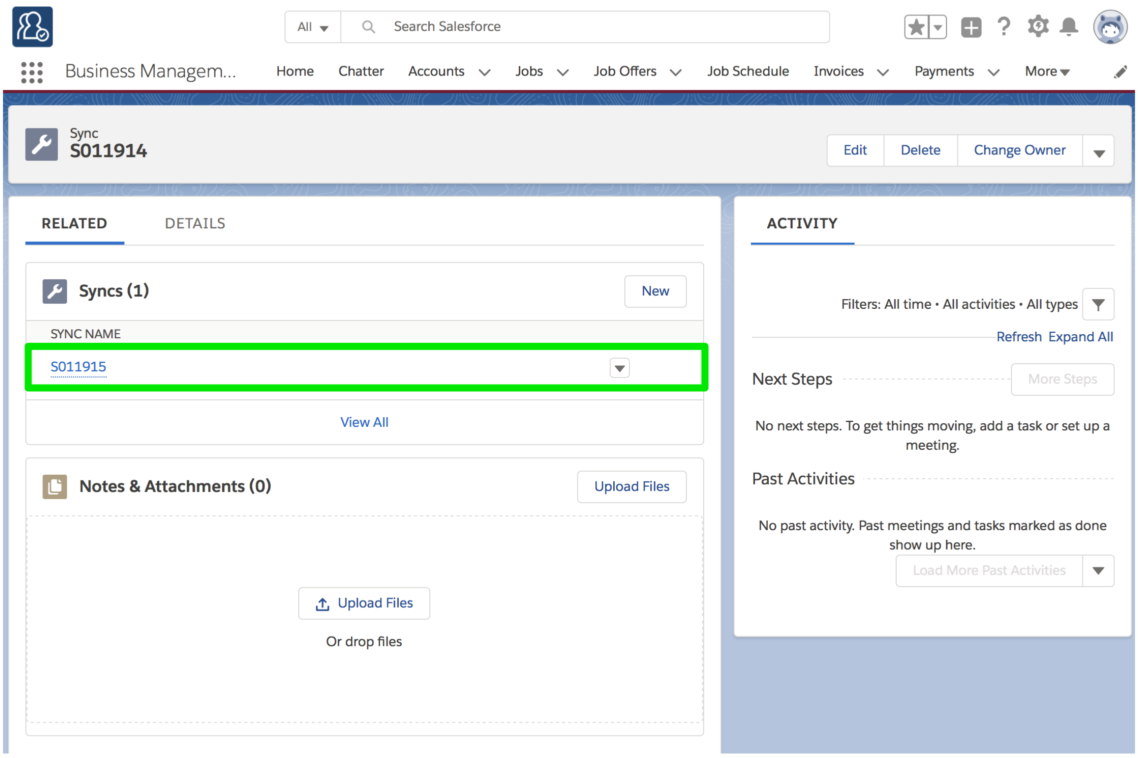
Sync attachments help system administrators gain more insight into synchronization.

To explore Sync attachments

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

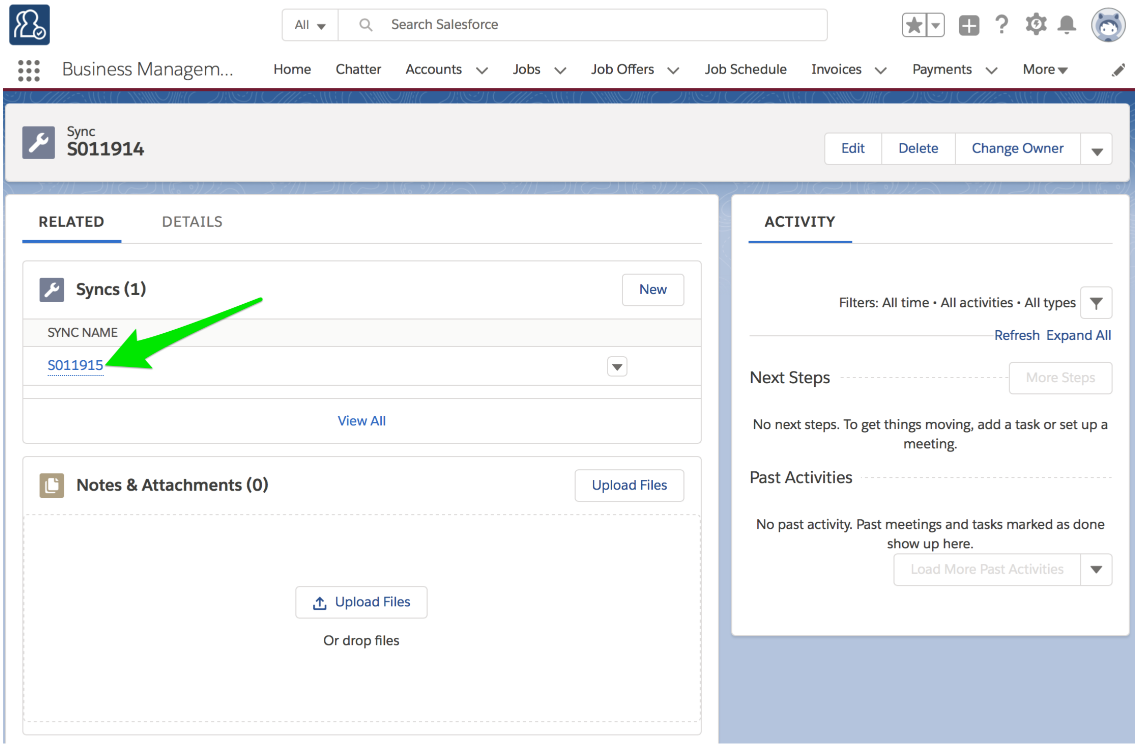


2. The Responses to this Request are listed within the **Syncs** list.

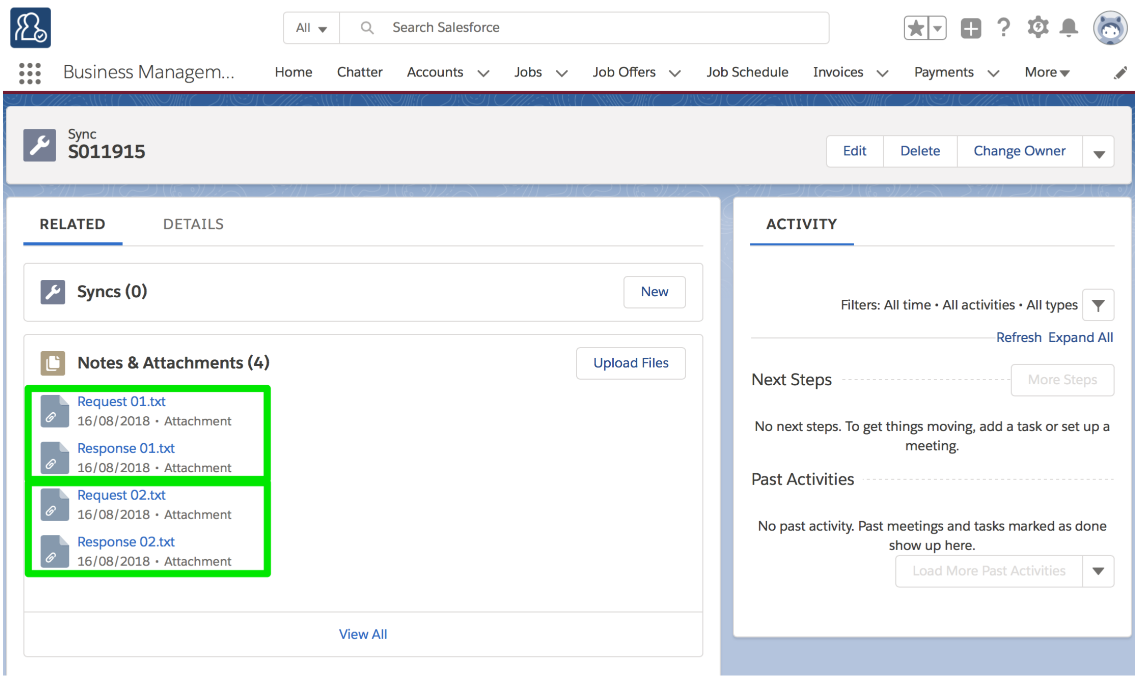


There are no Attachments to a Request Sync. The Attachments are listed on the Response Sync.

3. Select one of the Response Syncs.



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



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.

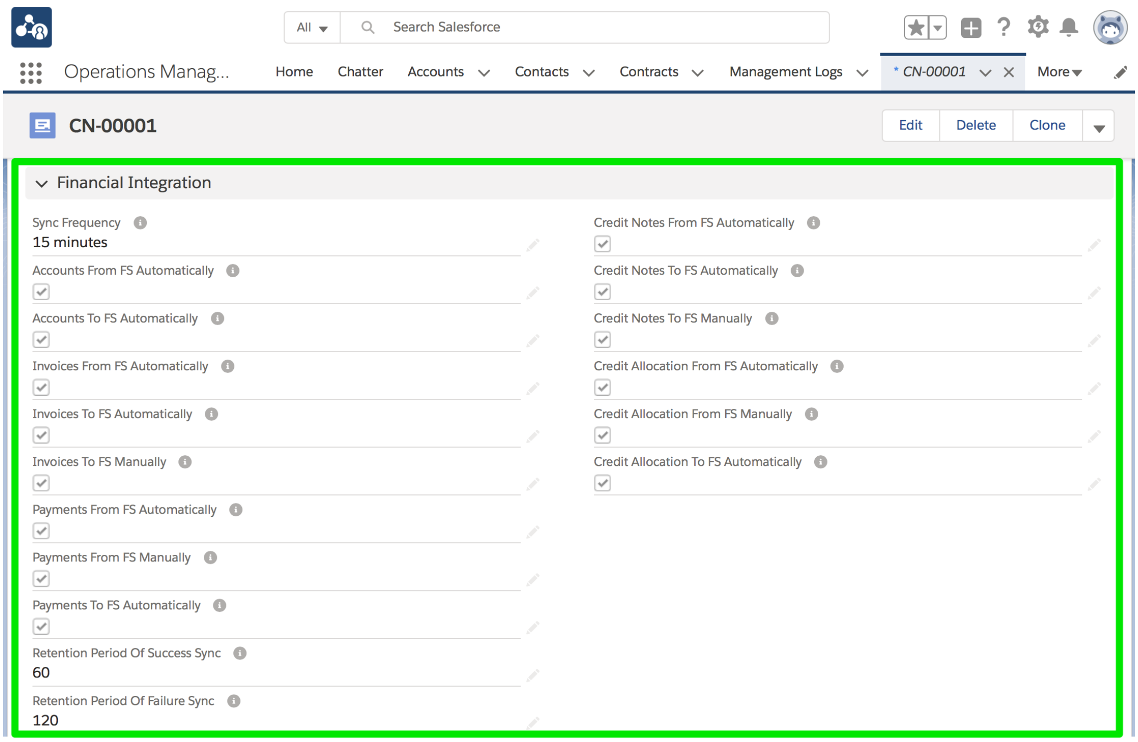
> Switching off every check box in the **Financial Integration** section of the **Configuration** record will prevent all synchronization with external financial systems.

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.

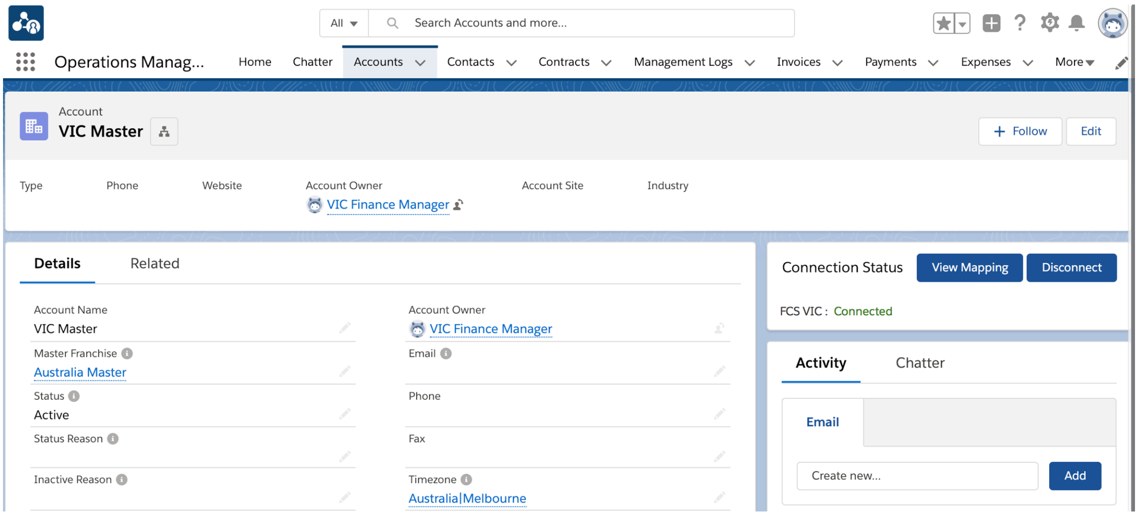
How to find the most recent sync

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

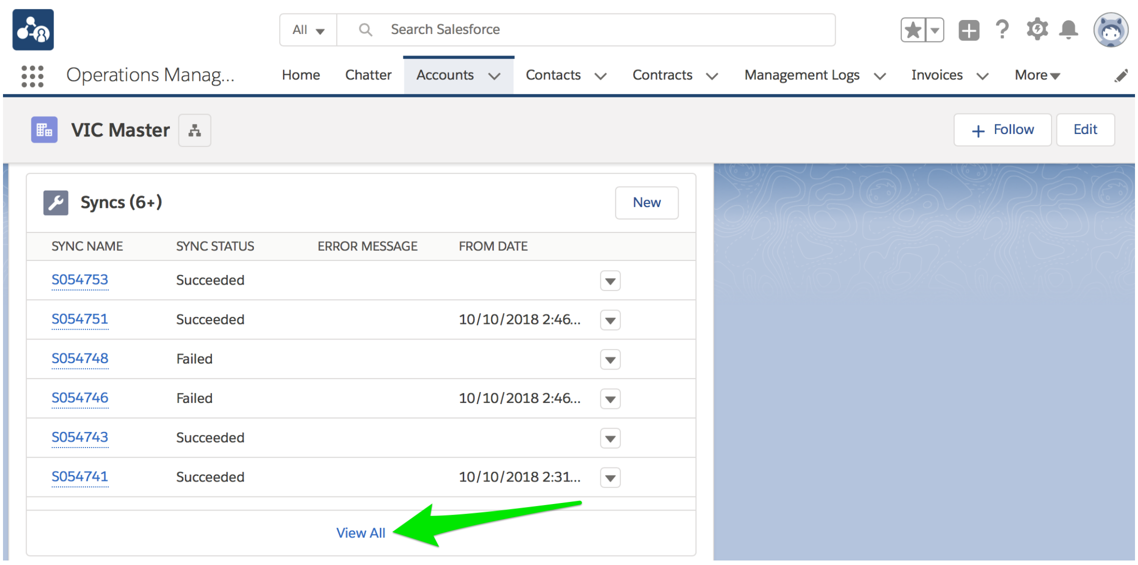
Synchronization occurs automatically based on a schedule configured by your franchisor. Syncs can also be manually initiated by system administrators. You can check the most recent sync history from your Account.

To check the most recent sync period

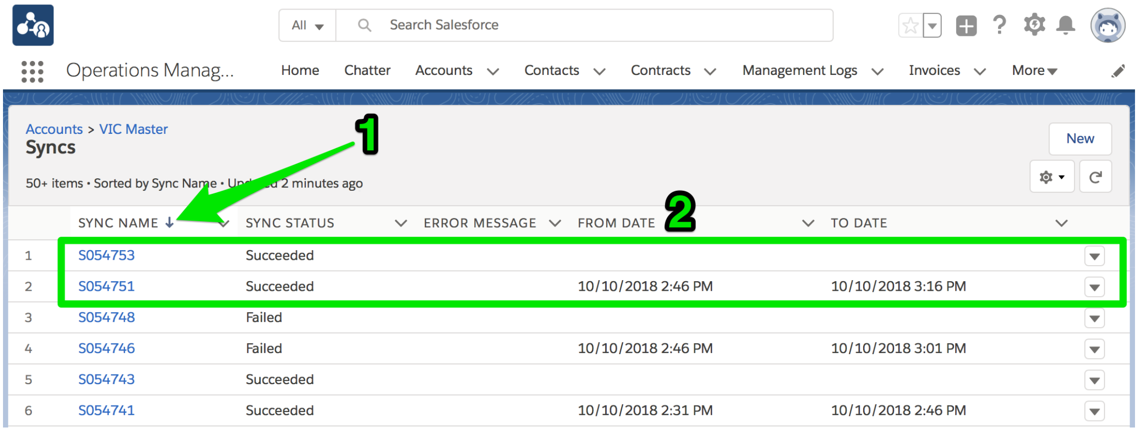
1. From your **Account**, select the **Related** tab.



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



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



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.

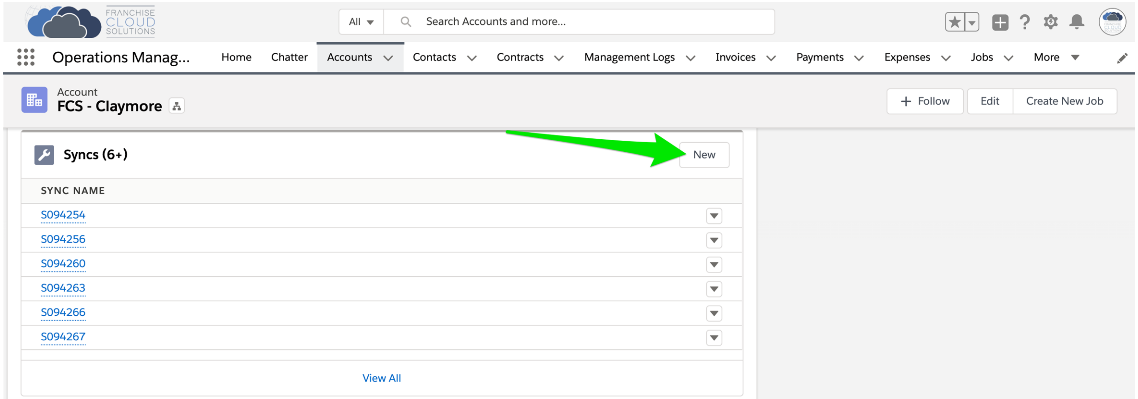
How to prevent historical syncing

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.

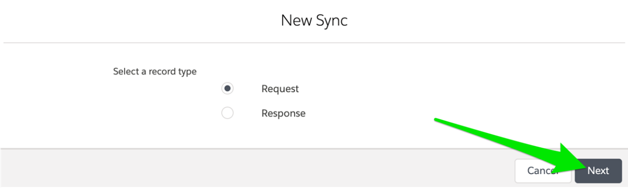
> Attempts to sync a long-lived Xero account with a newly created Franchise Profile Account will usually result in syncing errors. You need to limit the sync to the period in which the Franchise Profile Account has records relating to the Xero account.

To prevent historical syncing

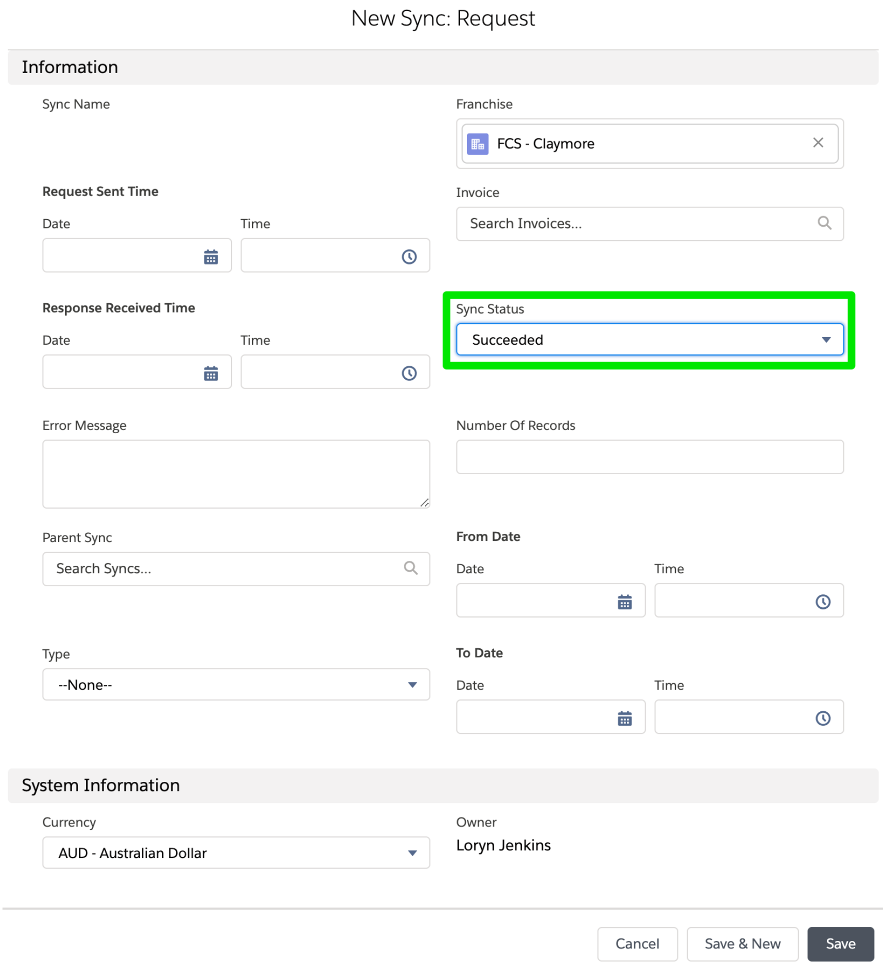
1. From the **Franchise Profile Account**, find the Syncs section and press **New** (button is on the **Related** tab).



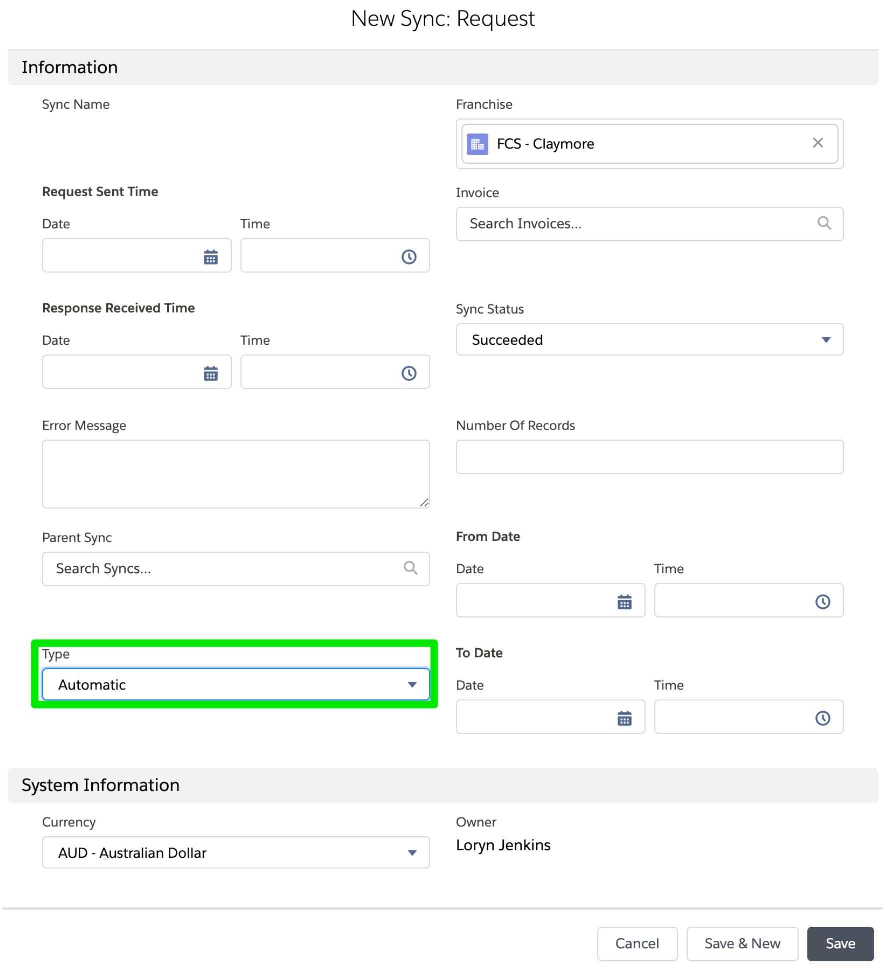
2. From the **New Syncs** dialog choose `Request`.



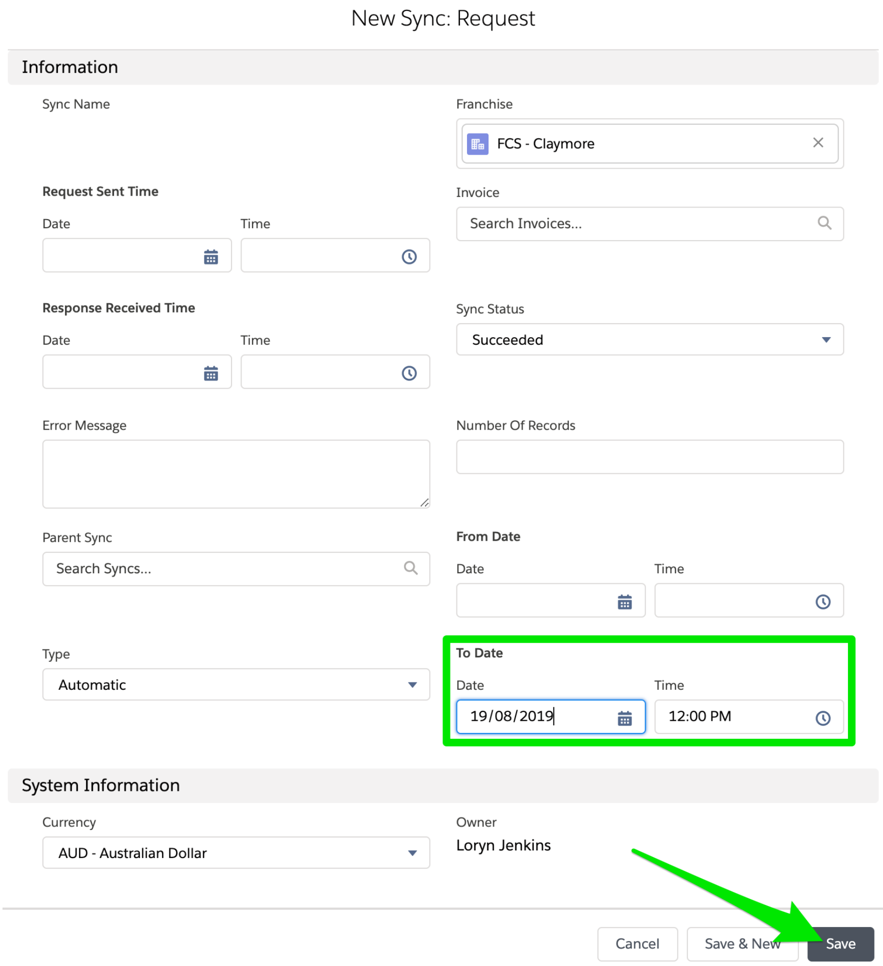
3. Set the `Sync Status` to *Succeeded*.



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



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



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

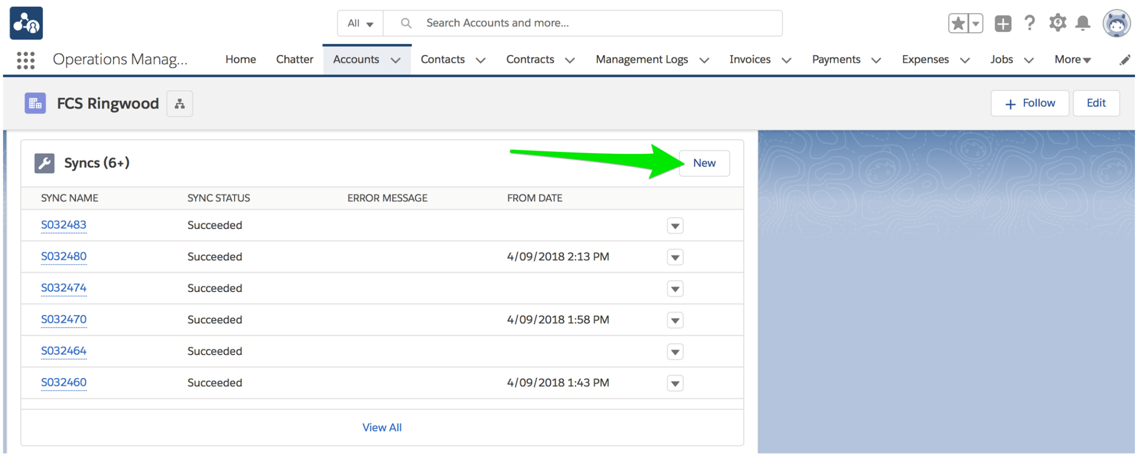
> If you need to sync historical records from a defined range prior to the specified `To Date`, create a manual sync for the desired period (*See* "How to manually sync specific records" on the next page).

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.

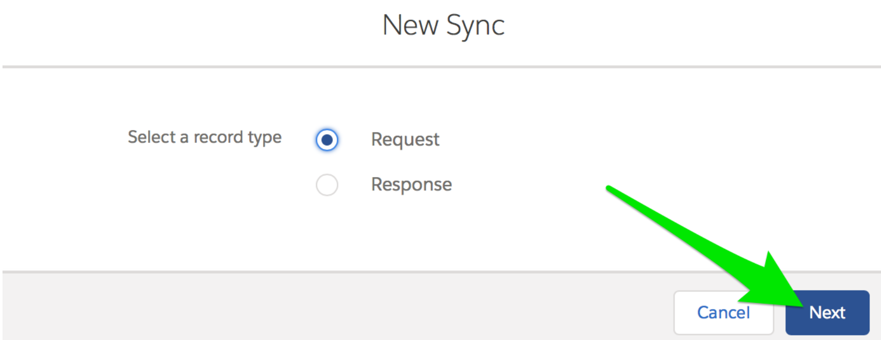
To sync specific date and time ranges for a particular account

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



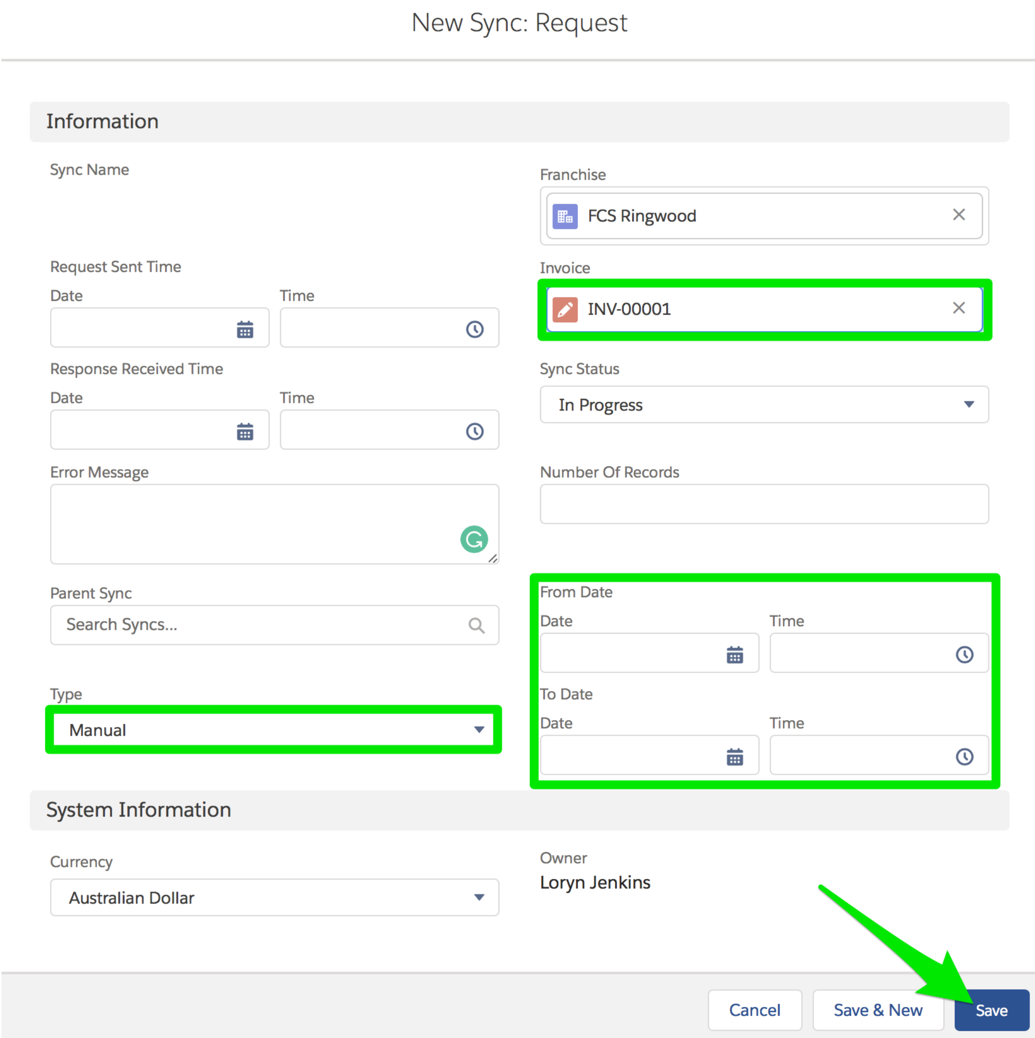
The **New Sync** dialog box appears.

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.



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 if 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 if 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

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

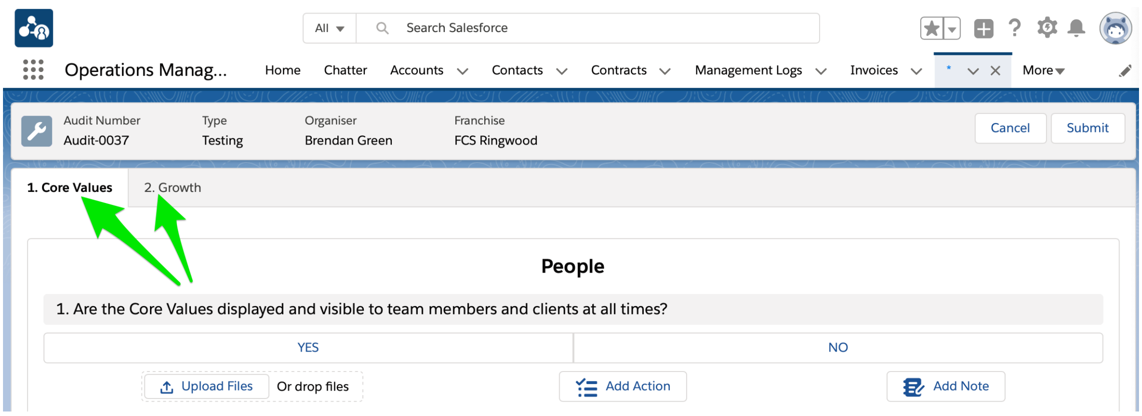
- Binary answers: Yes or No | Pass or Fail | True or False
- Scaled answers (0-n)
- Worded responses selected from a defined set
- Not applicable (N/A)

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.

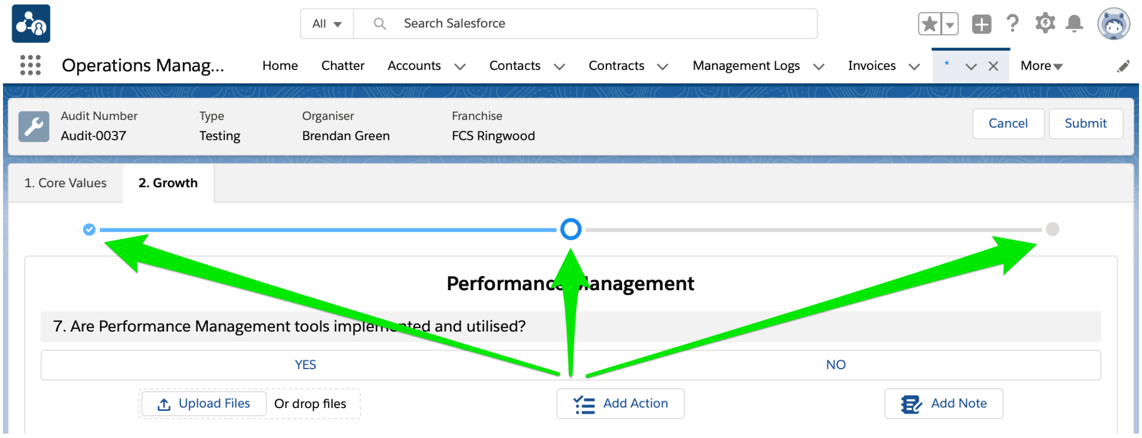
How audits appear to end users

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

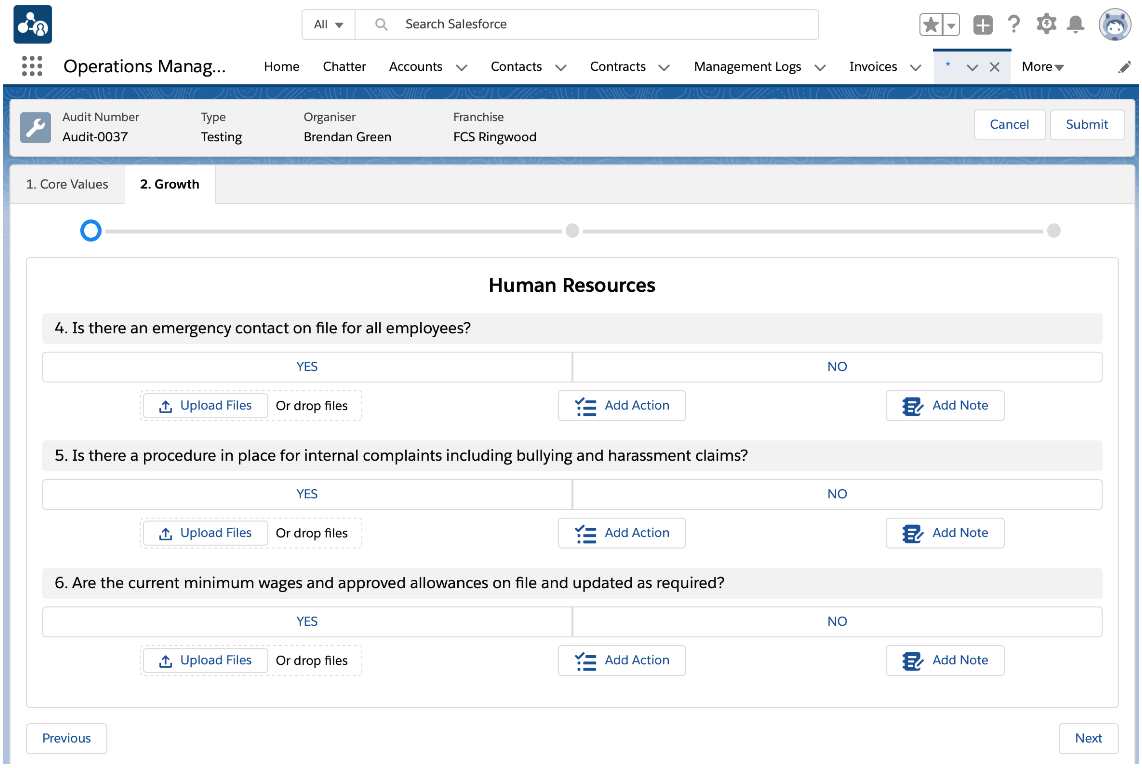
- Questions can be grouped by tabs.



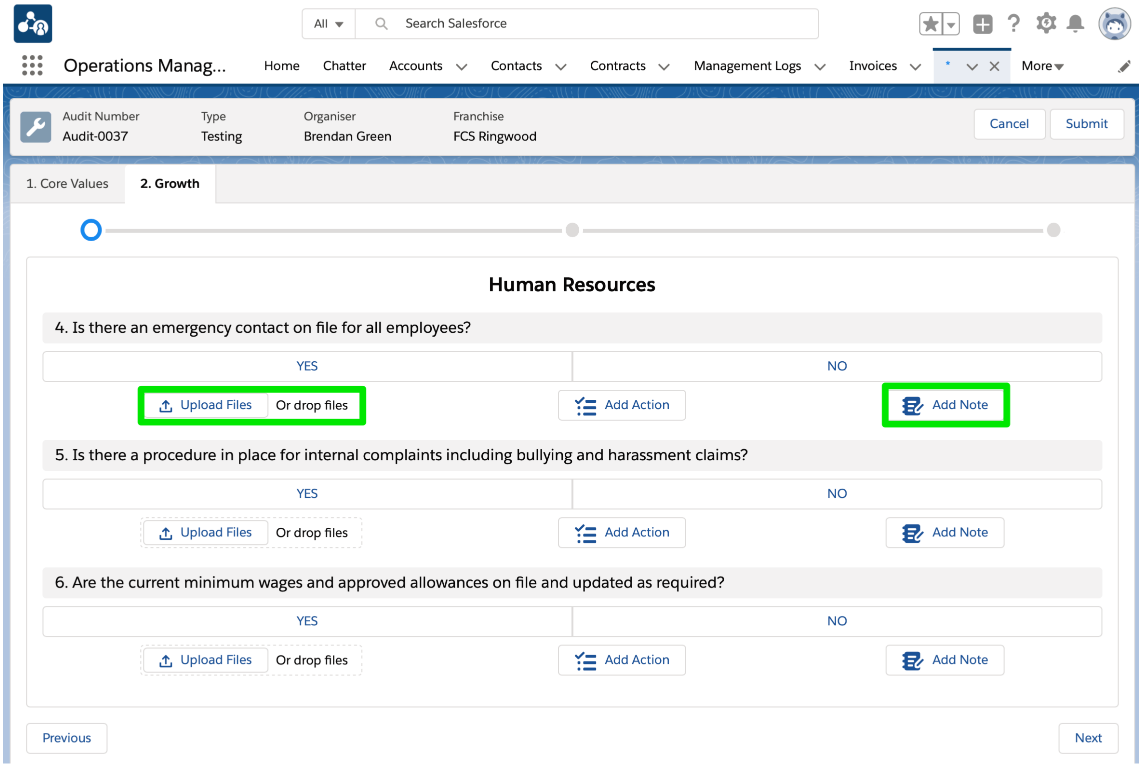
» Each tab can show multiple pages of questions. Progress is shown on a progress bar.



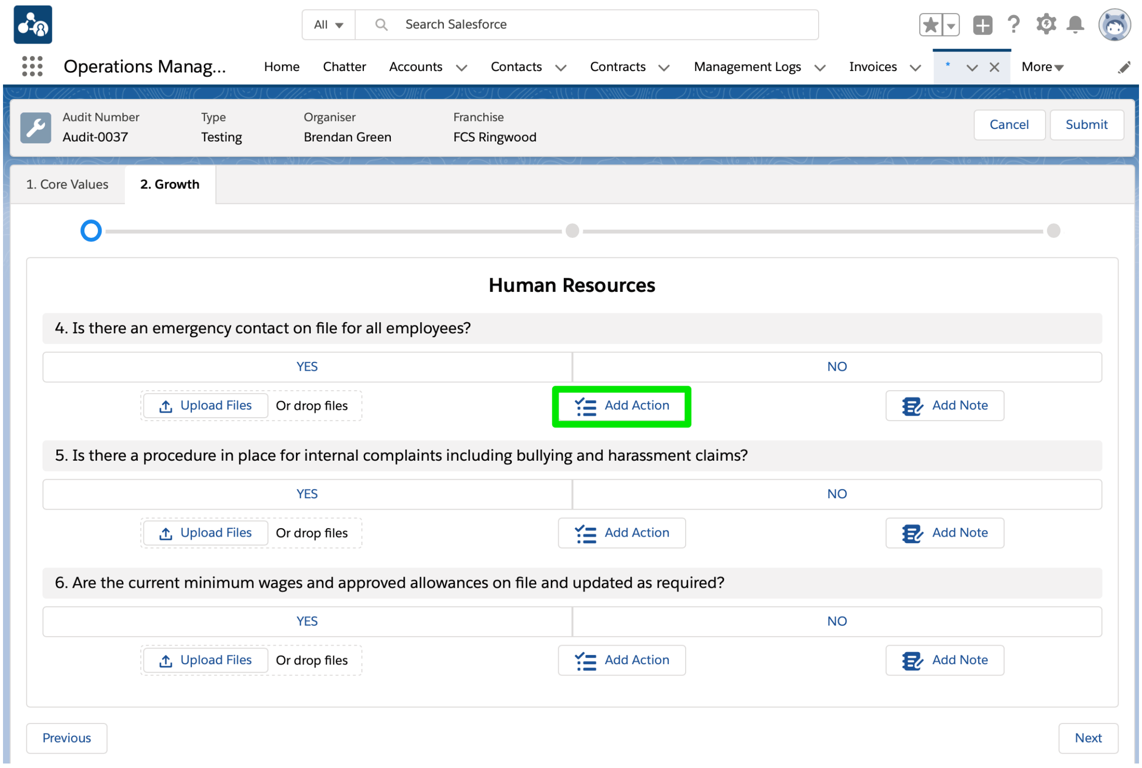
» One or more questions can display on each page.



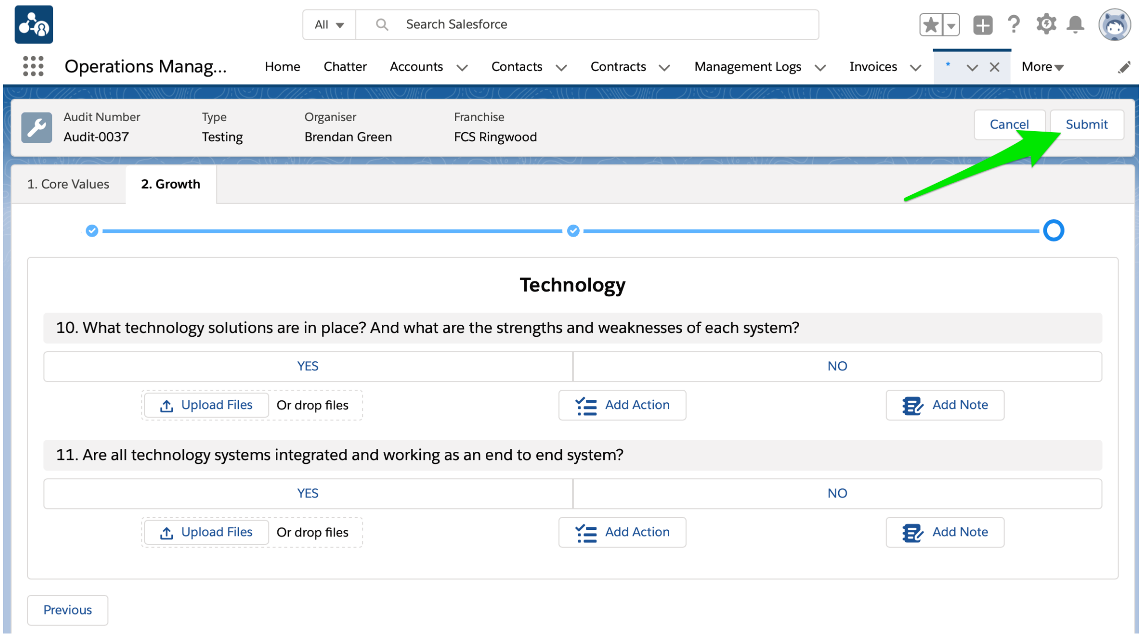
» The user can provide evidence for answers by recording notes or uploading files, images and photographs.



» Actions arising from the observation can be created.



» When complete, the user submits the audit.



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.	Check: Current health and safety cert is filed for each employee.
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.

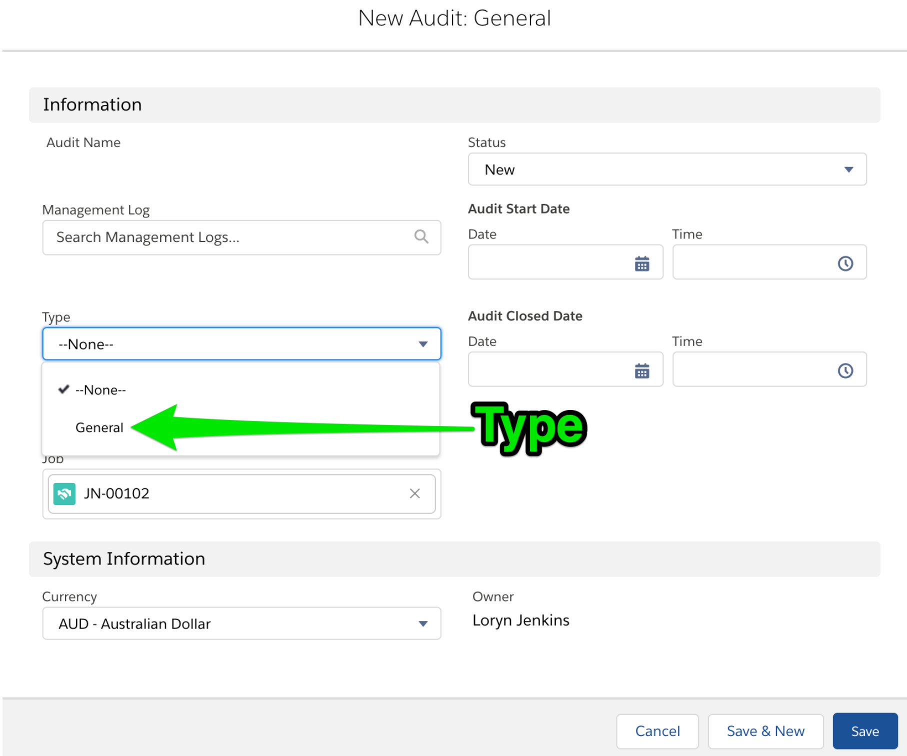
Possible Findings	Maximum Score	Score Direction	Description	Comments
N/A | False | True	10	UP	True will score 10 False will score 0 N/A excludes question from scoring	Score Direction has no effect on binary responses.
N/A|1|2|3|4|5	5	UP	1 will score 1 2 will score 2 3 will score 3 4 will score 4 5 will 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.

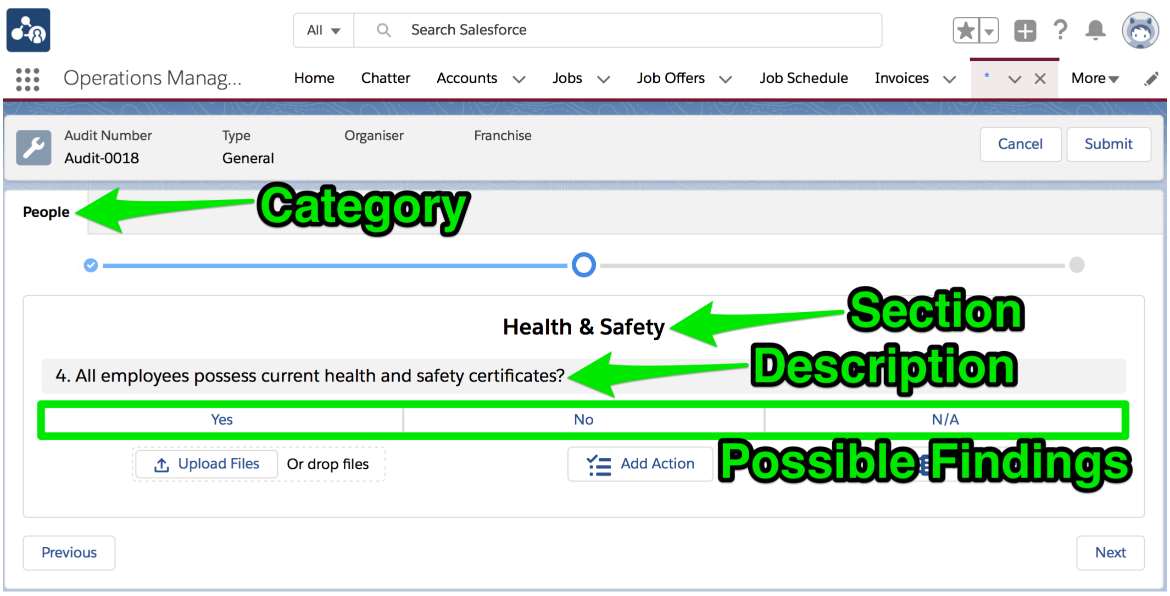
Possible Findings	Maximum Score	Score Direction	Description	Comments
Slider:%	100	UP	The score will be the selected value.	Slider increments by 0.01, which is multiplied by the Maximum_Score to obtain the score value.
Slider:2	10	UP	Slider positions 0, 2, 4, 6, 8, 10 will be generated. The score will 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.



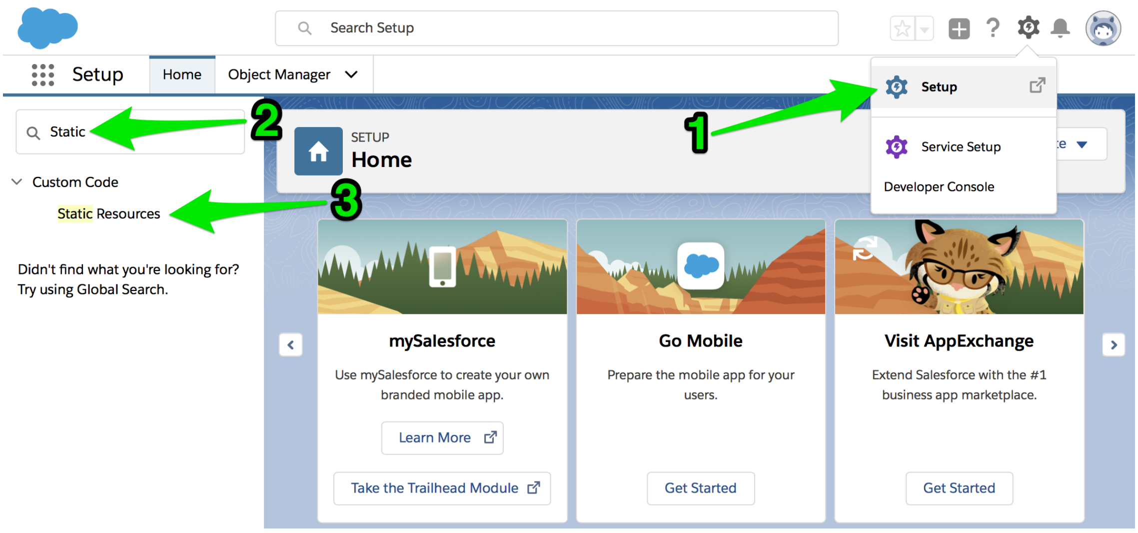


How to add or change audit instruments

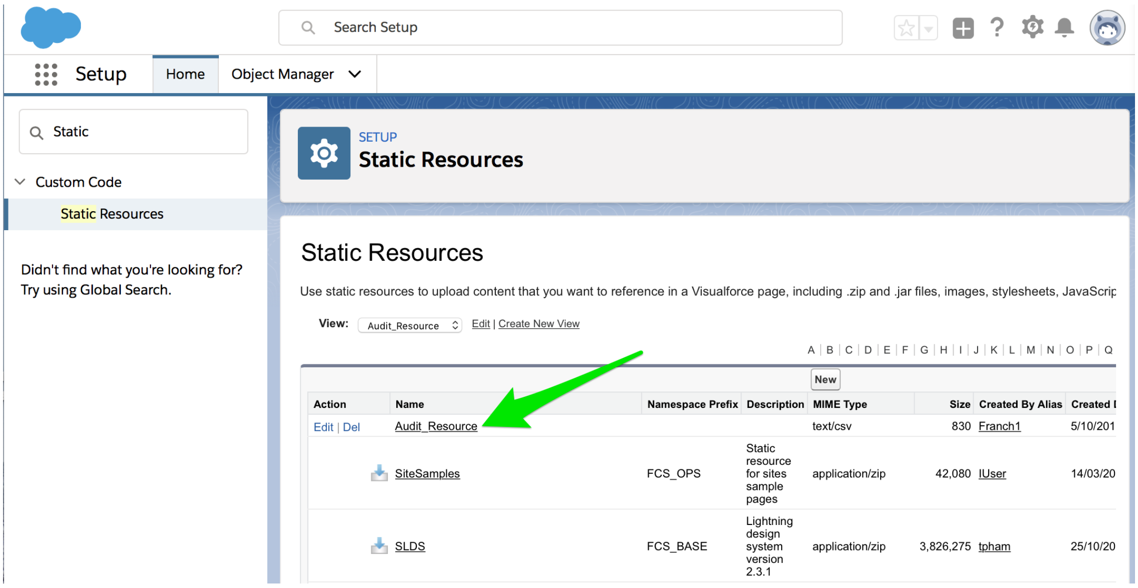
Questions for all audits are prepared in a single static resource and then imported into Salesforce.

To obtain the current audit resource file

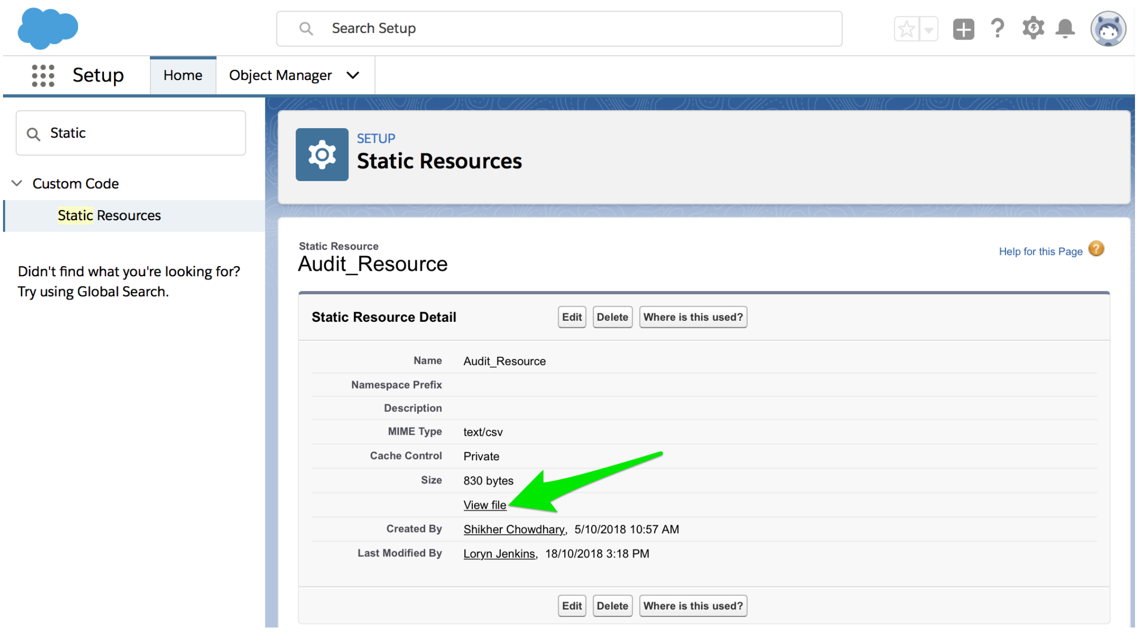
1. From **Setup**, search for `Static Resources`.



2. Click on the current `Audit_Resource`.



3. Click on the `View file` link.



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.

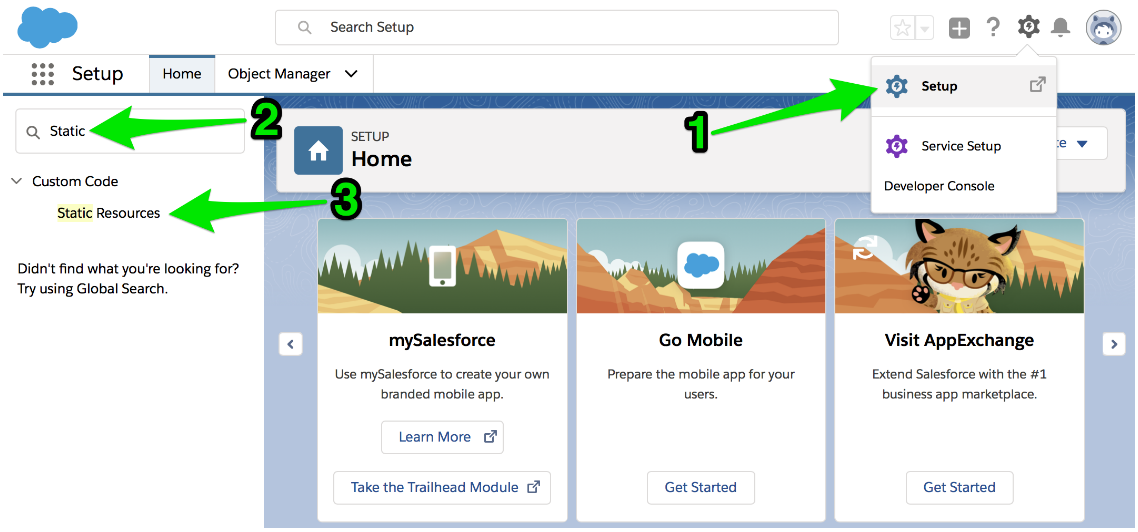
To edit the audit resource file

» *See* "How to work with the audit resource file" on page 146.

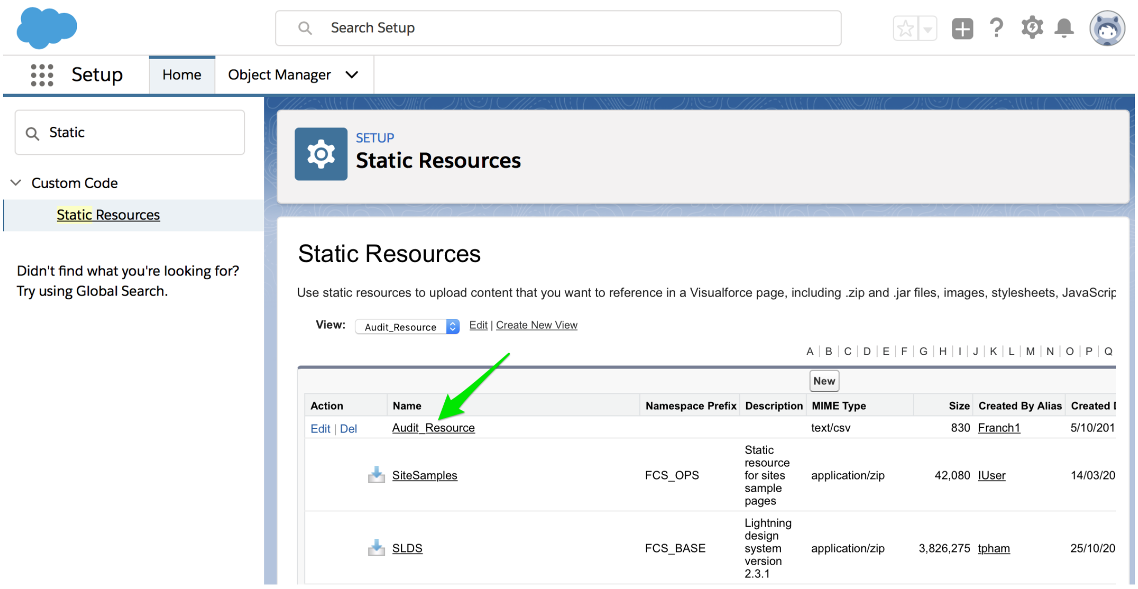
> If you add a new Type to the spreadsheet, you will need to configure a new audit type (*See* "How to configure a new audit type" on page 157) before updating the audit resource file into Salesforce.

To update the audit resource file

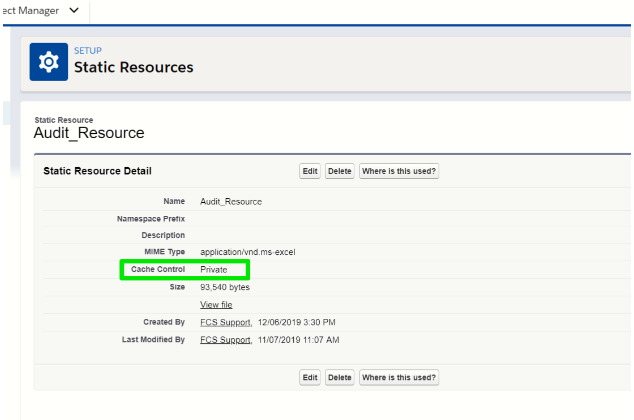
1. From **Setup**, search for `Static Resources`.



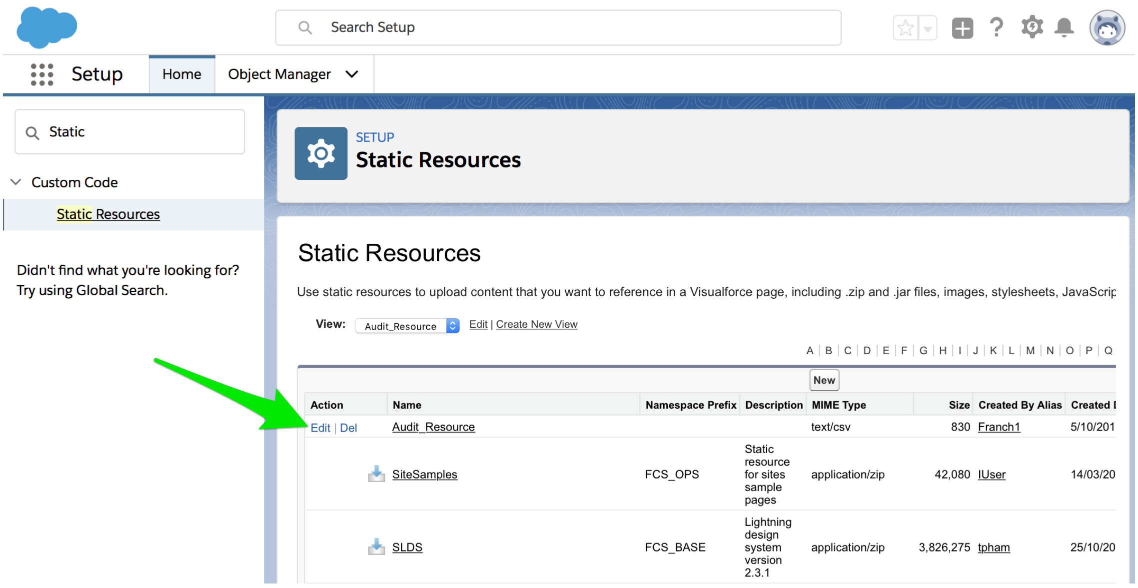
2. Click on the `Audit_Resource` link.



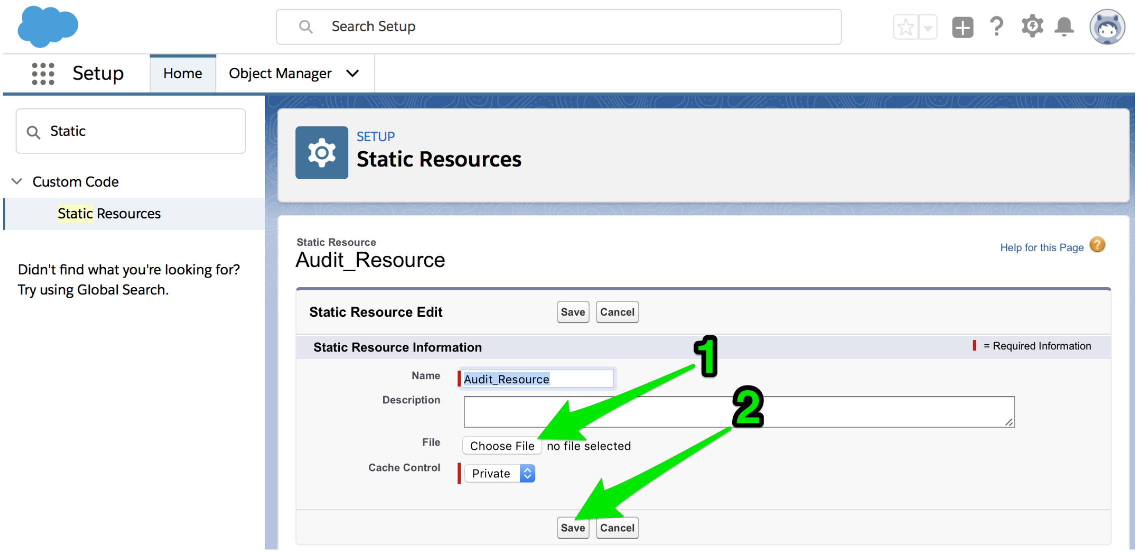
3. Ensure `Cache Control` is set to *`Private`*.



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



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.

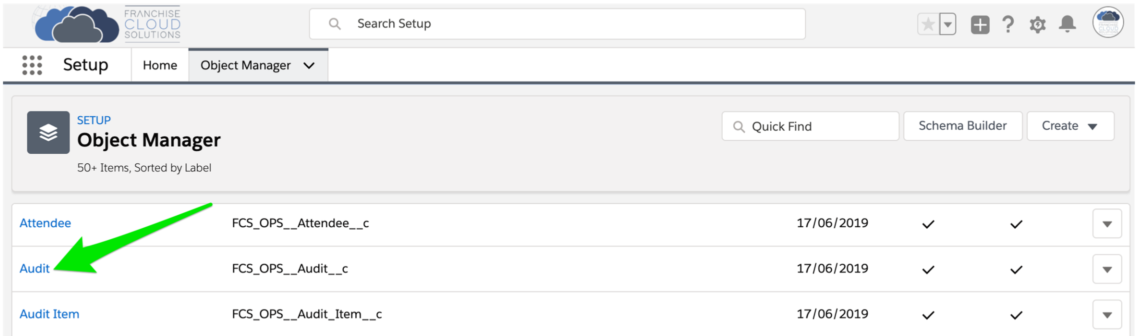
You should then see the changes you have made to the `Audit_Resource.csv` file reflected in the available audit types, questions, answers, tabs and sections.

How to configure a new audit type

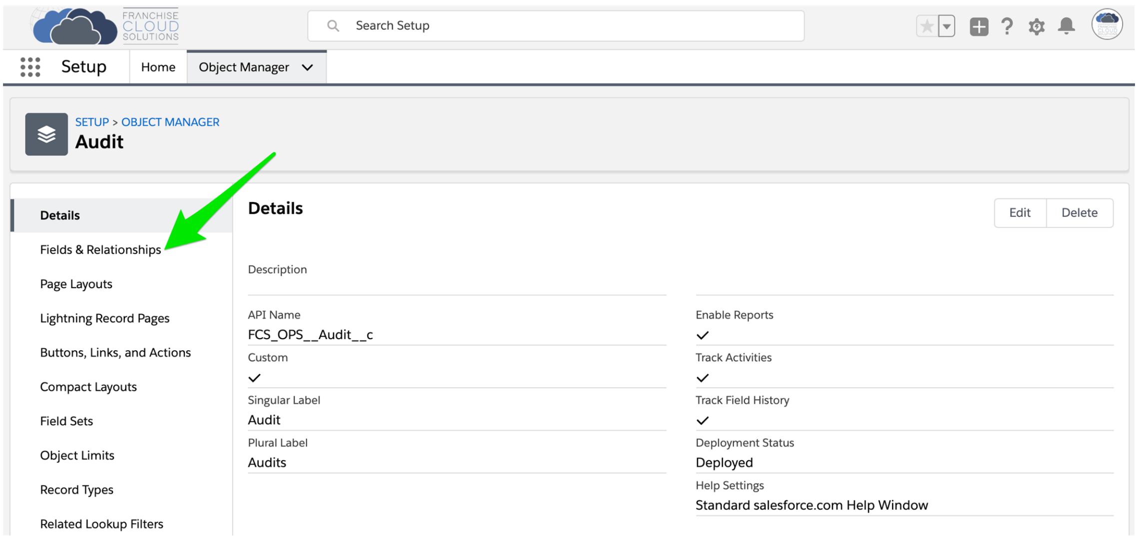
When you import an audit plan into Salesforce, new and changed questions for existing audit types will automatically be available the next time you create a new audit. However, importing an audit plan is not sufficient for new audit types to appear in the Audit dialog's Type field. To make new audit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

To add a new audit type

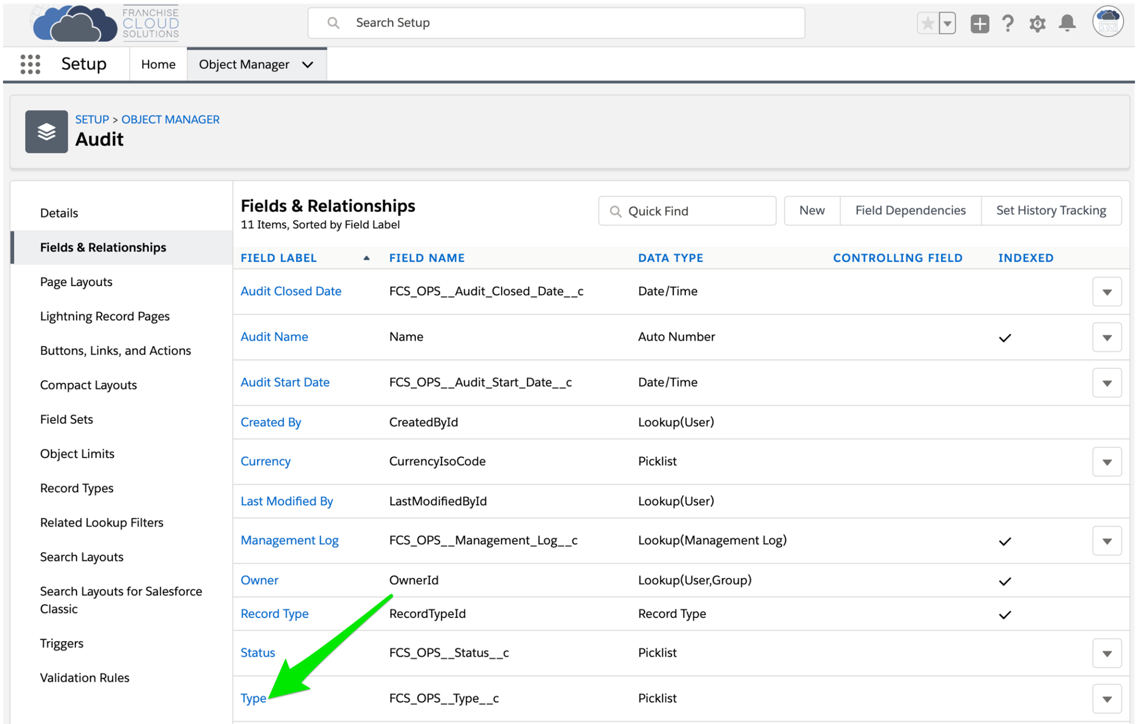
1. Go to **Setup**, and search for `Object Manager`.
2. From **Object Manager**, select the `Audit` record.



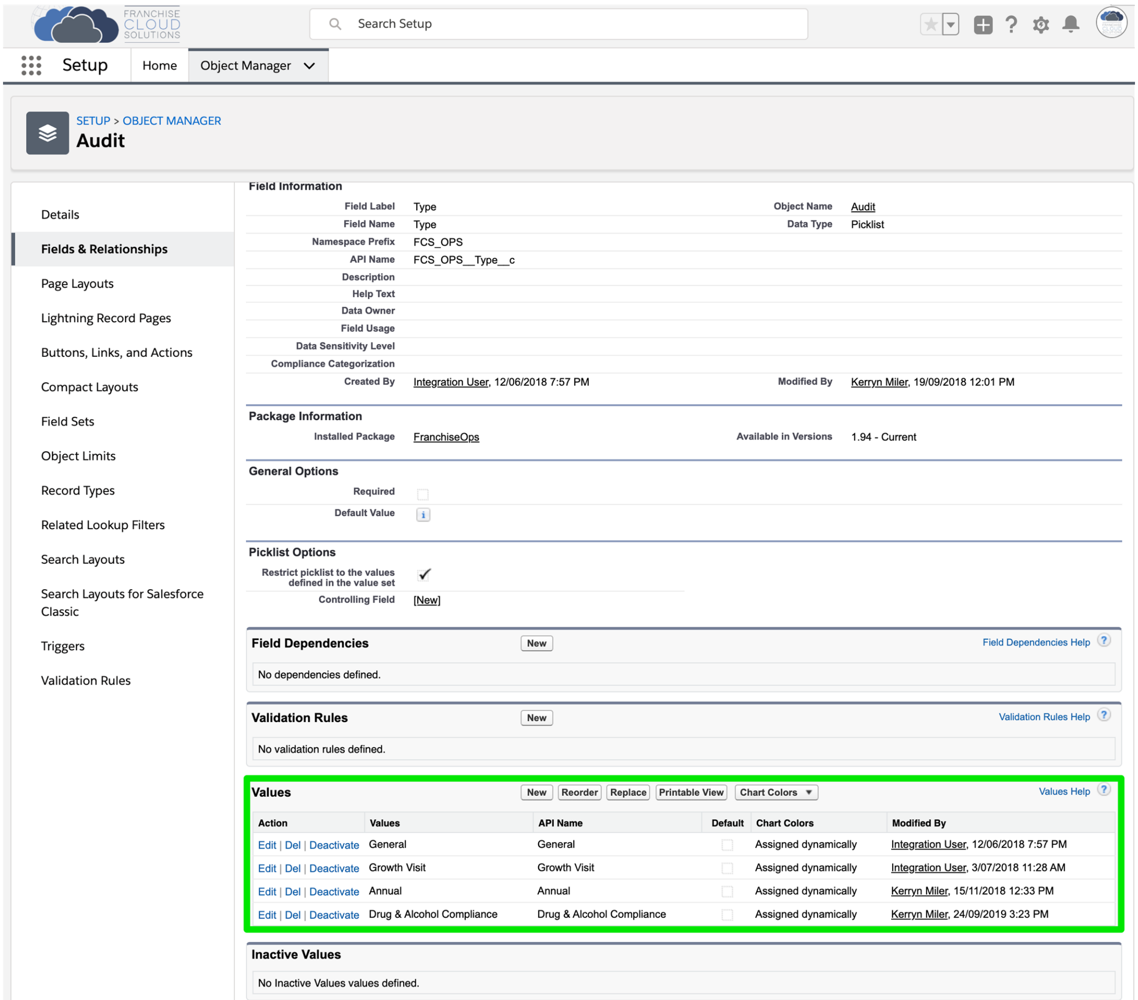
3. Select `Fields & Relationships`.



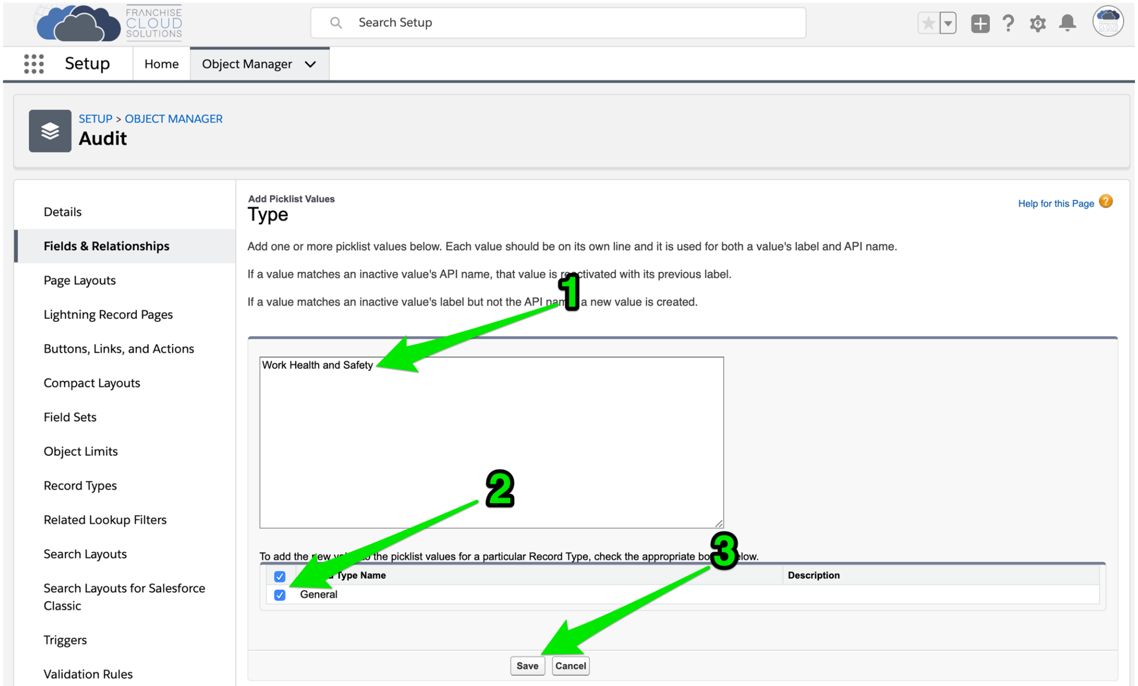
4. Now choose the `Field Label` named *Type*.



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



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**.

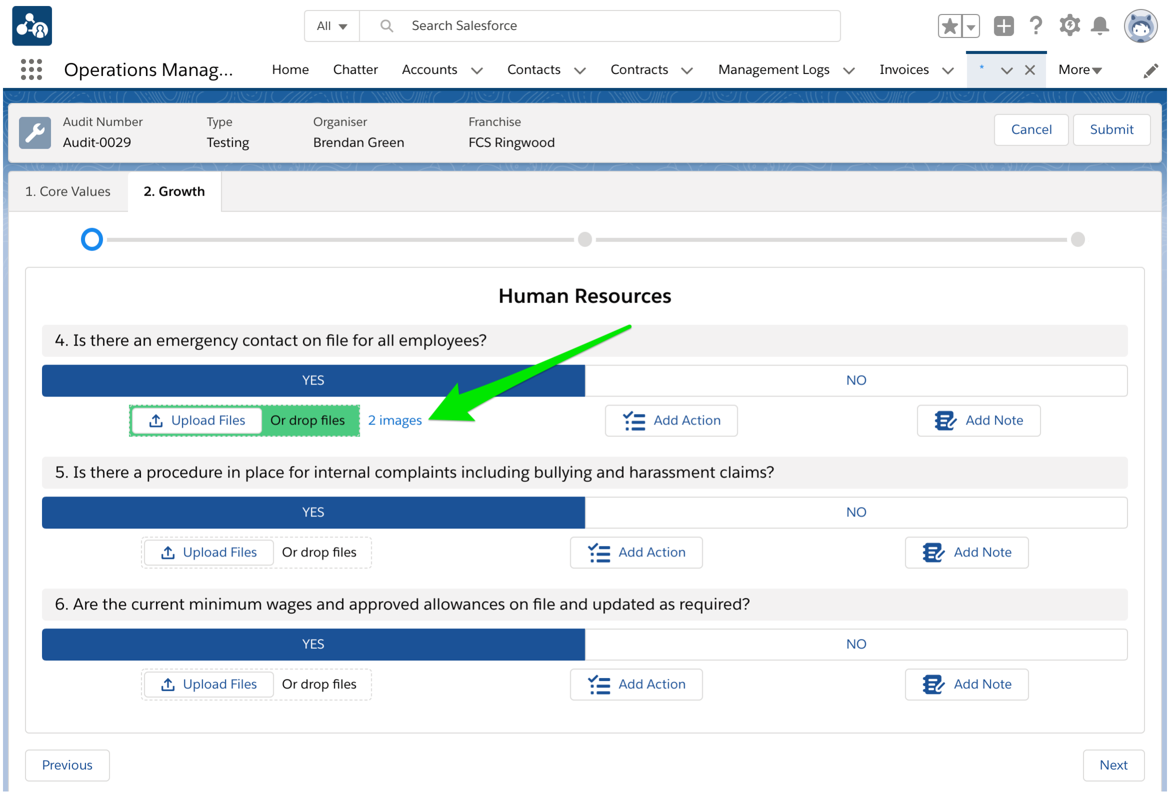


The new value is added to the list of types available from the General record.

> 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

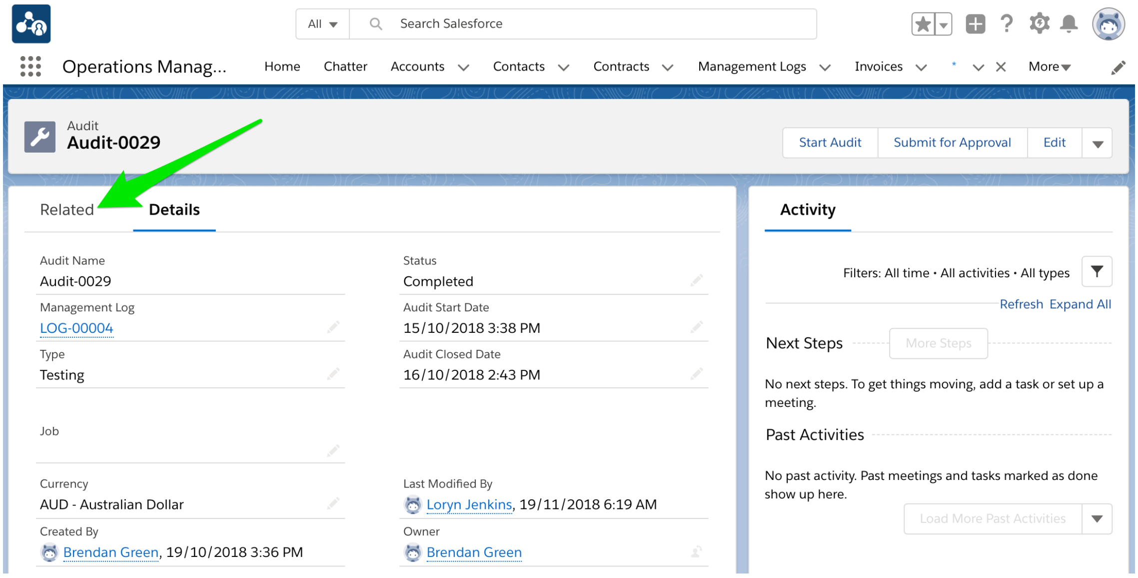
Attachments that are images can be viewed by clicking the images link. Clicking the image link allows you to view the image. You have the option to delete the image should you choose to do so.



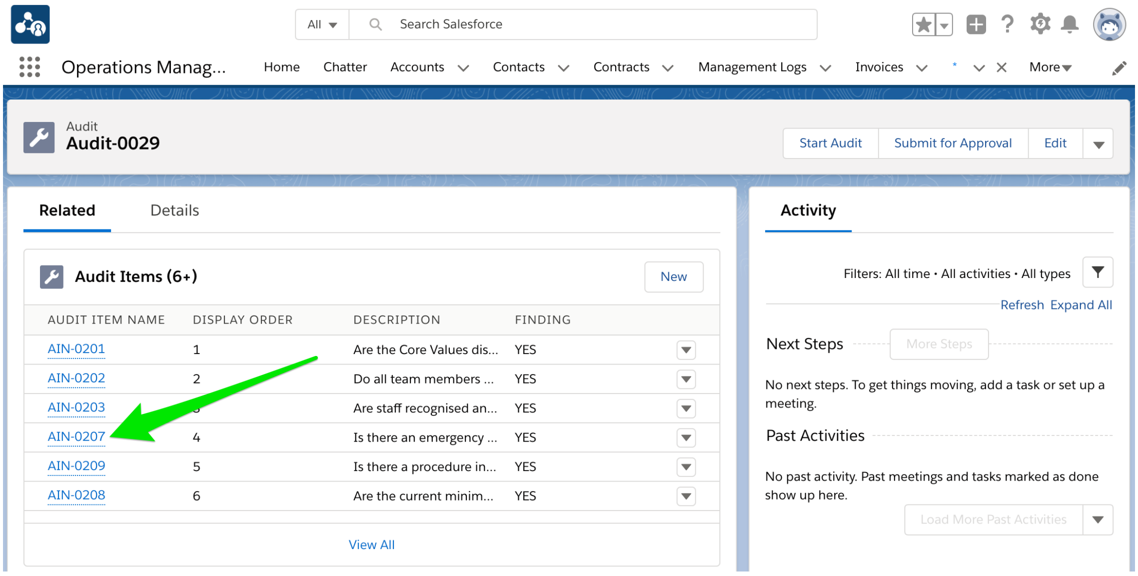
Attachments that are not images are managed via attachments to the audit questions.

To locate non-image attachments

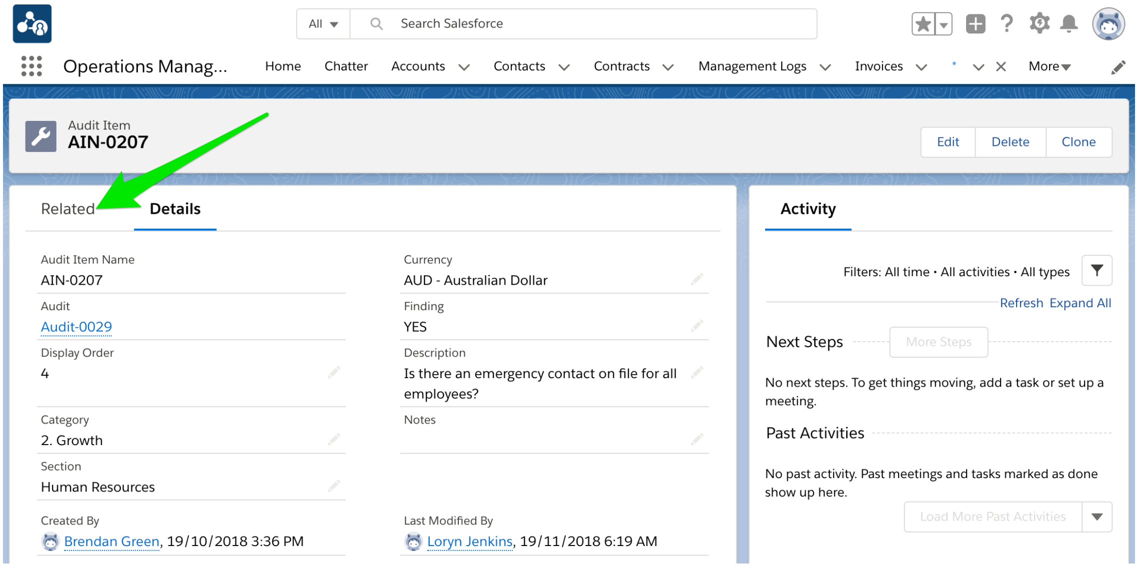
1. From the **Audit** record, selected **Related**.



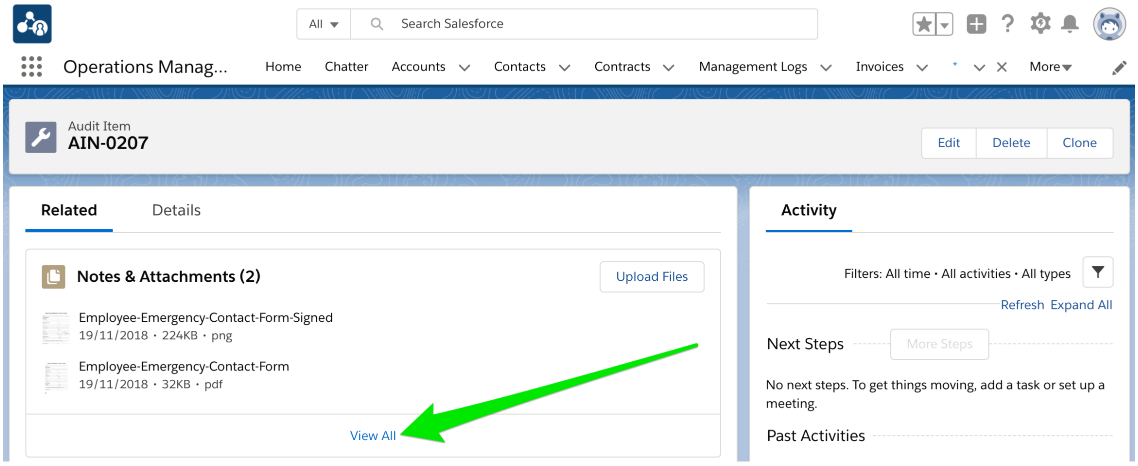
2. Select an **Audit Item**.



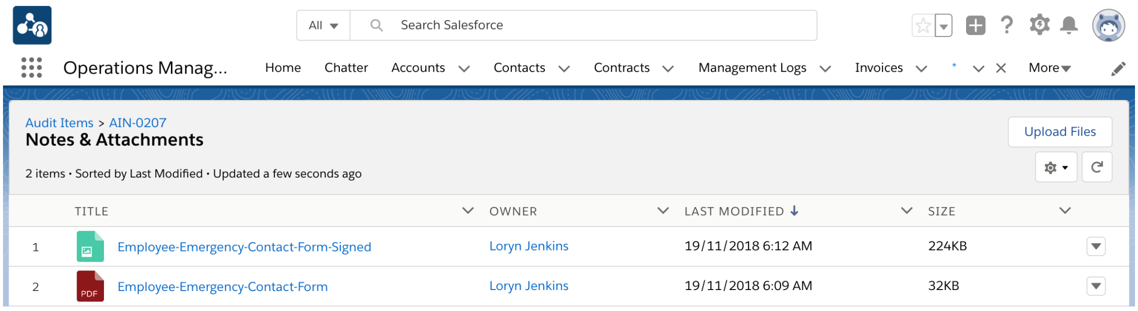
3. Now select the **Audit Item**’s **Related** tab.



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

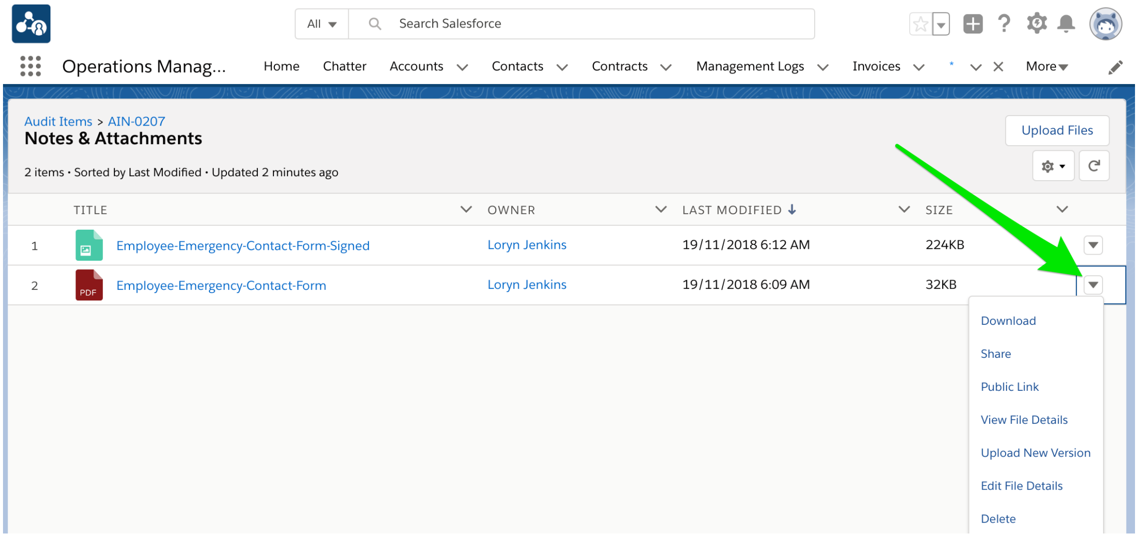


5. You can now view all the files attached to the question.



To edit any of the attachments

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



CHAPTER 13

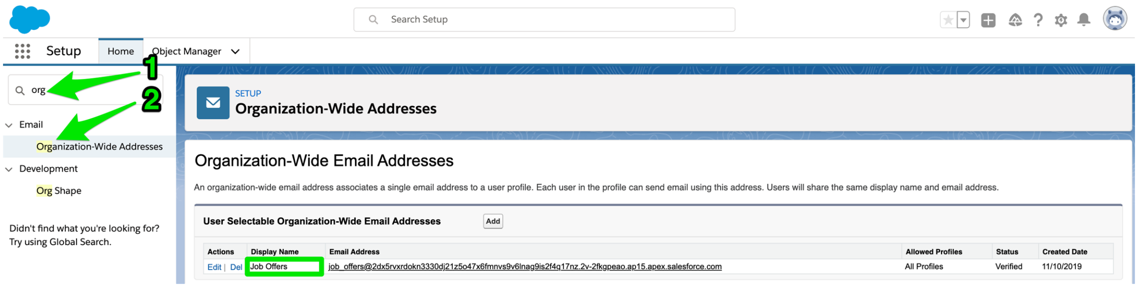
Working with Email

How to configure an organization wide email address

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

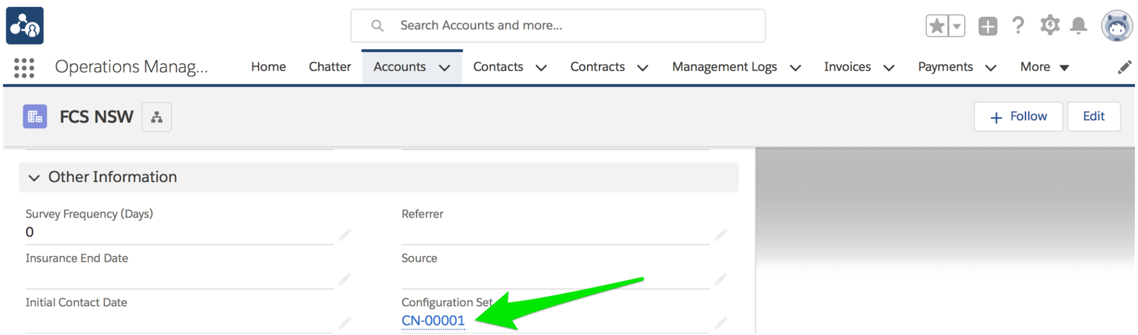
To configure the Org Wide Email Address

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

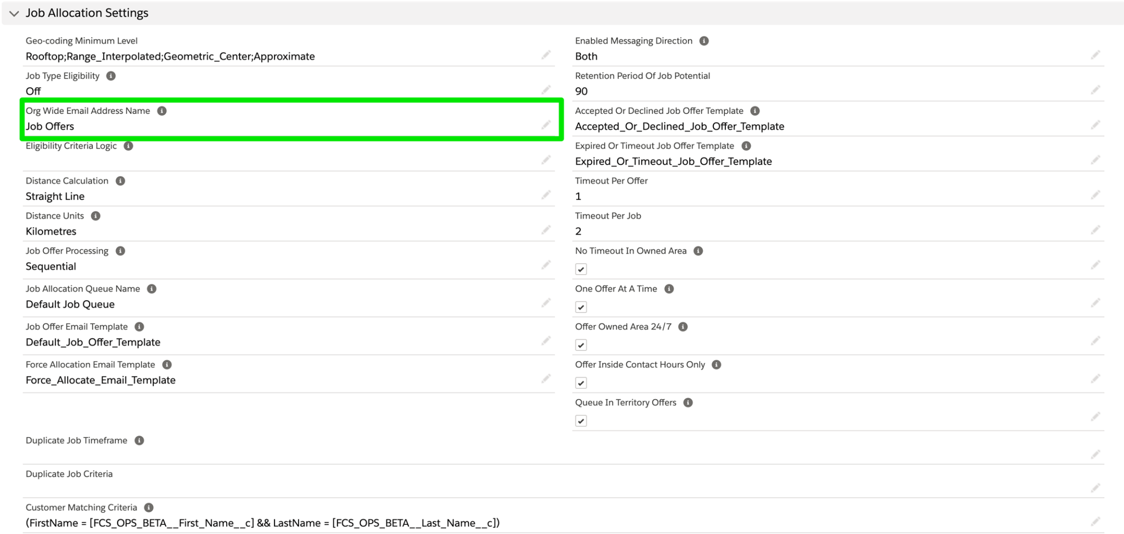


   The **Organization-Wide Email Address** identifier is displayed in the `Display Name` field.

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



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



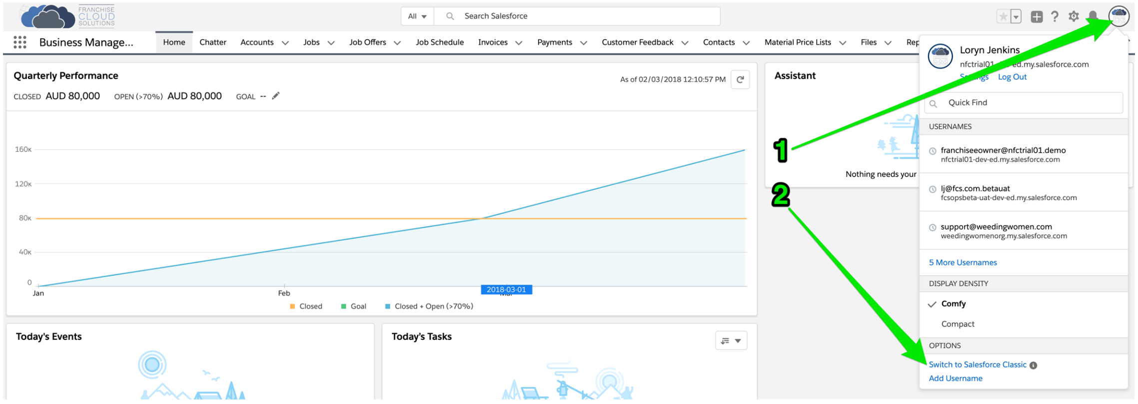
How to set up an email signature block

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

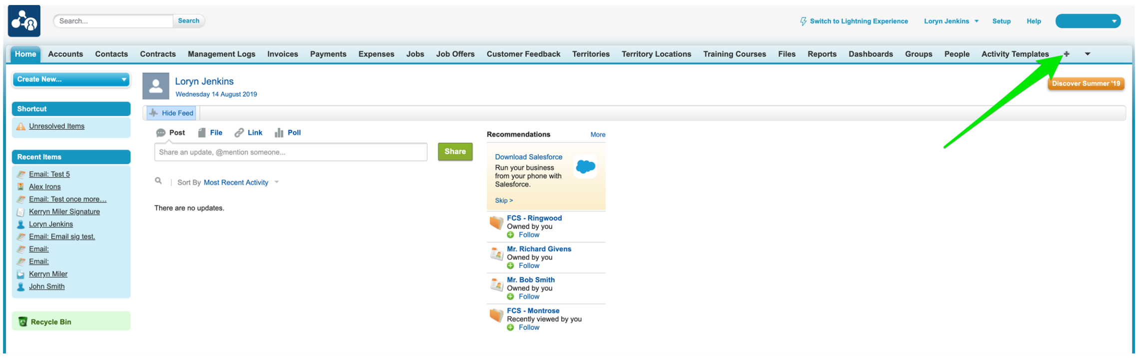
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.

To obtain a signature block URL

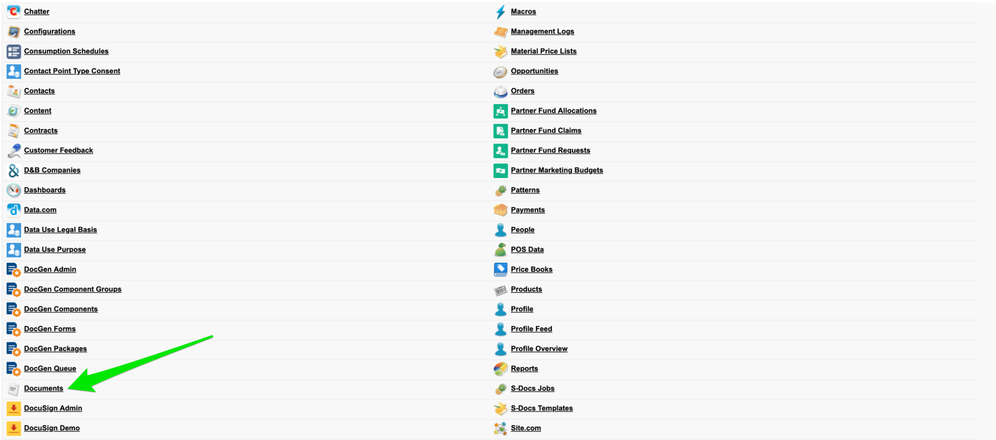
1. Obtain a signature block image for a user.
2. Within Salesforce, switch into Classic.



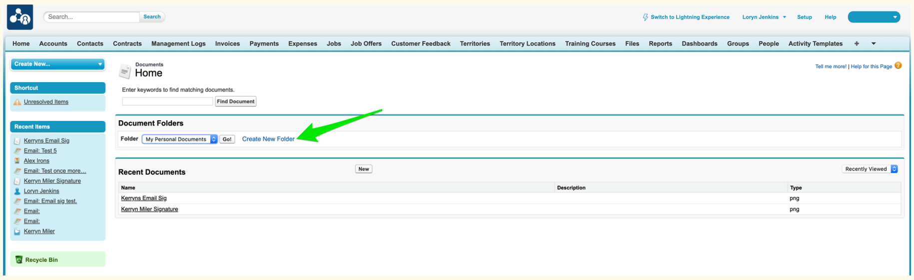
3. Find the documents tab, either in the menu or by pressing the **+** icon.



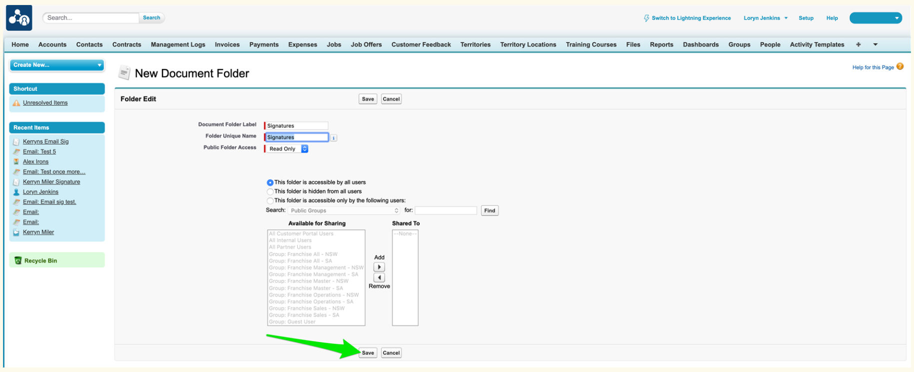
4. Now scroll down and select **Documents**.



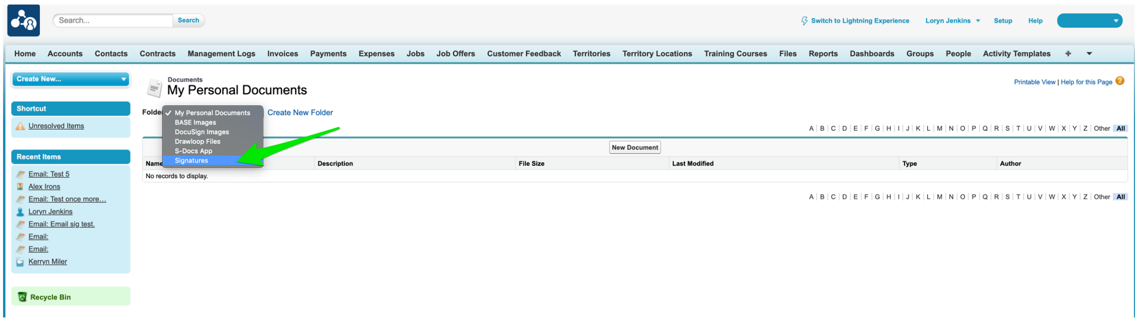
If this is the first signature you have uploaded, create a new folder for all email signatures called `Signatures`.



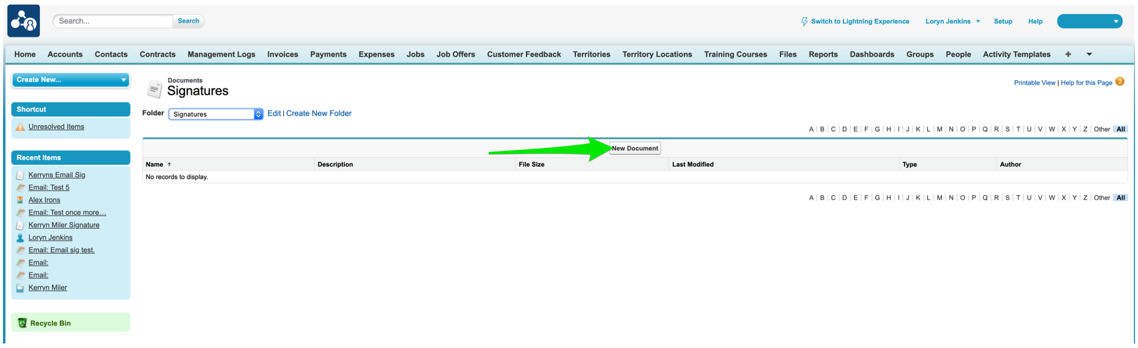
Complete the `Signatures` folder details, then press **Save**.



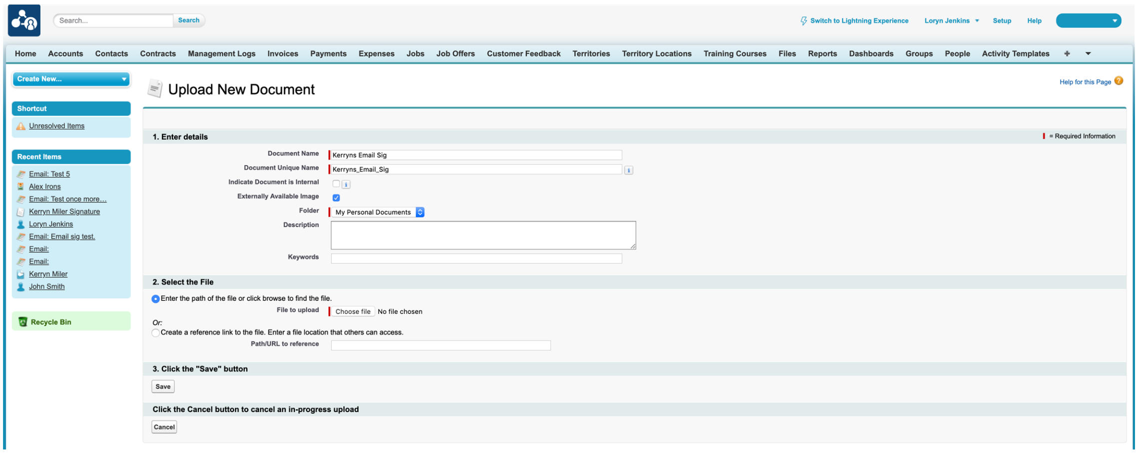
5. Switch to the `Signatures` folder.



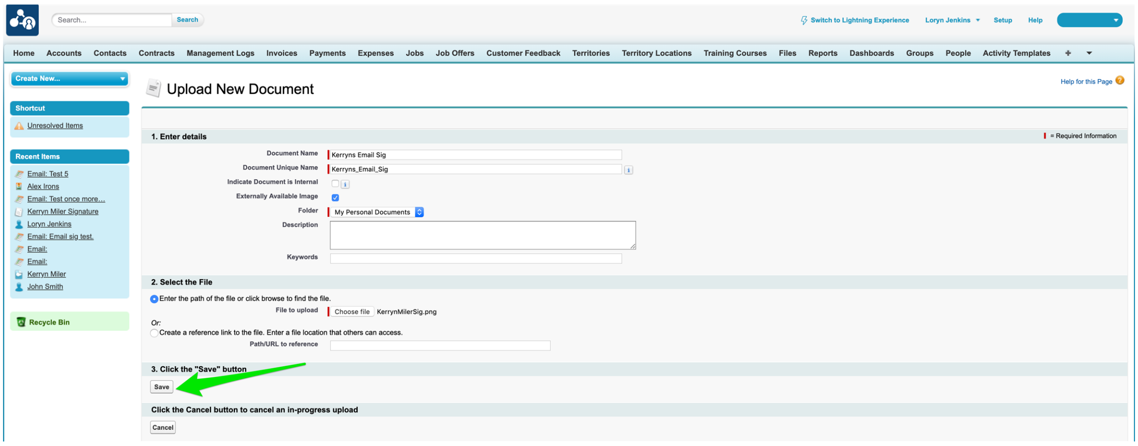
6. From the `Signatures` folder, press **New Document**.



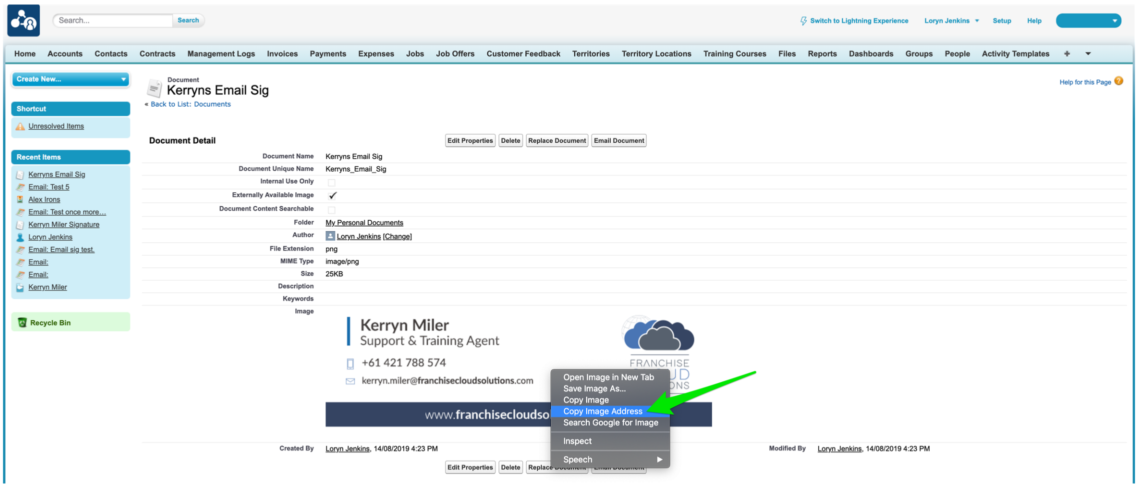
7. Complete the details. Make sure you check `Externally Available Image`.



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**.



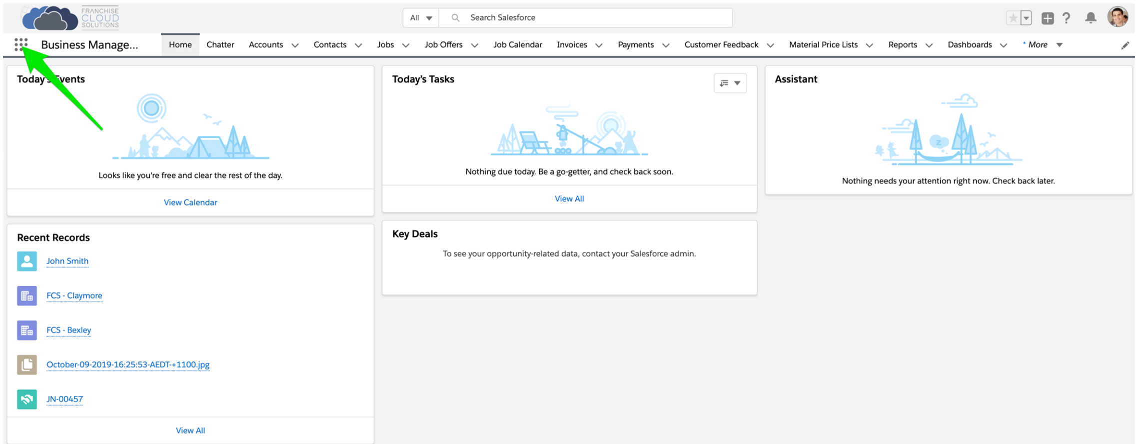
10. Wrap the copied URL into an HTML image tag. Replace *your link* in ** with the copied image address. Distribute the URL wrapped in the img tag to the appropriate user.

How to edit email template headers and footers

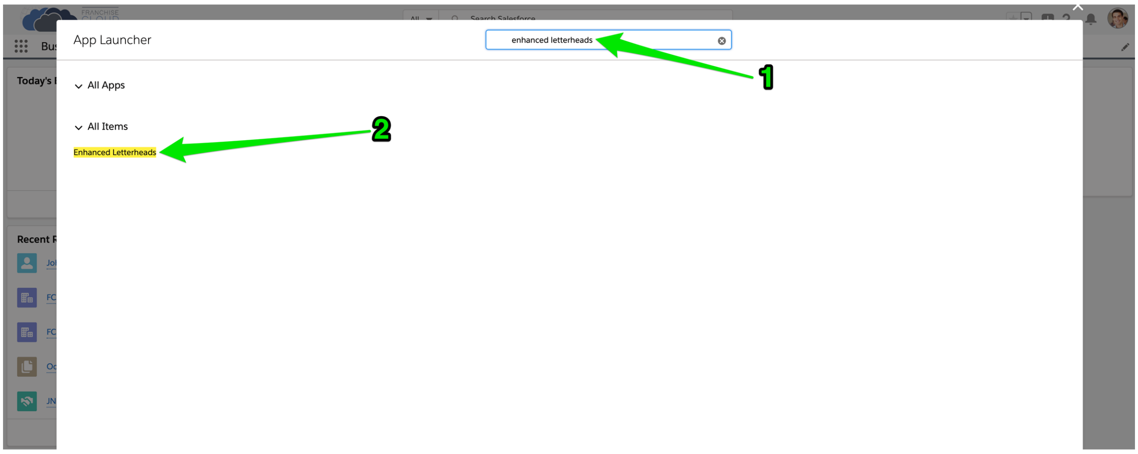
Most likely you will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

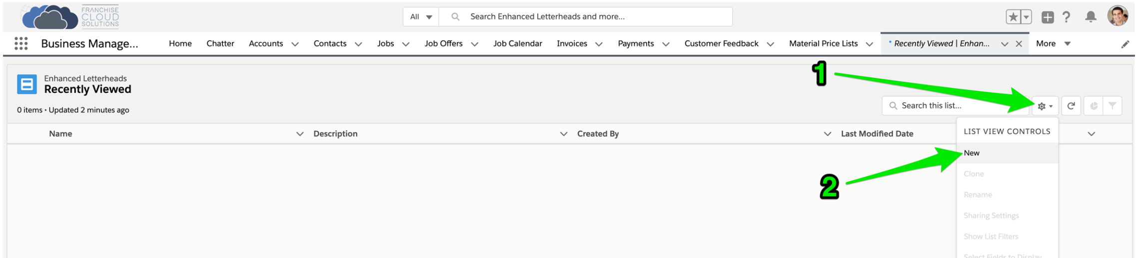
1. Open the **App Launcher**.



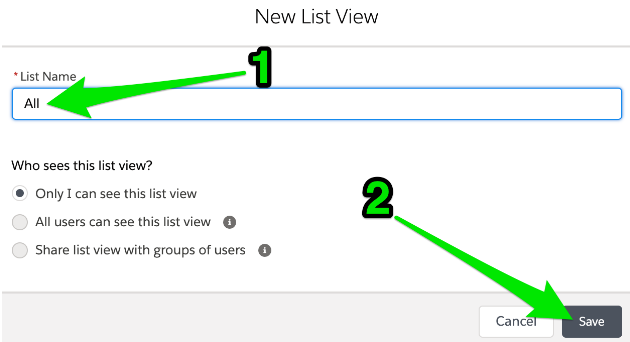
2. In the **App Launcher** `Search` box, enter *`enhanced letterheads`* and select the **Enhanced Letterheads** link.



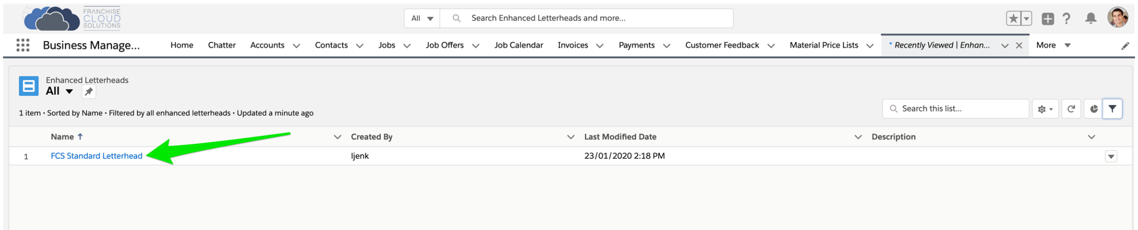
3. You may see an empty **Enhanced Letterheads** list. To see any of the letterheads, create a **New** list view.



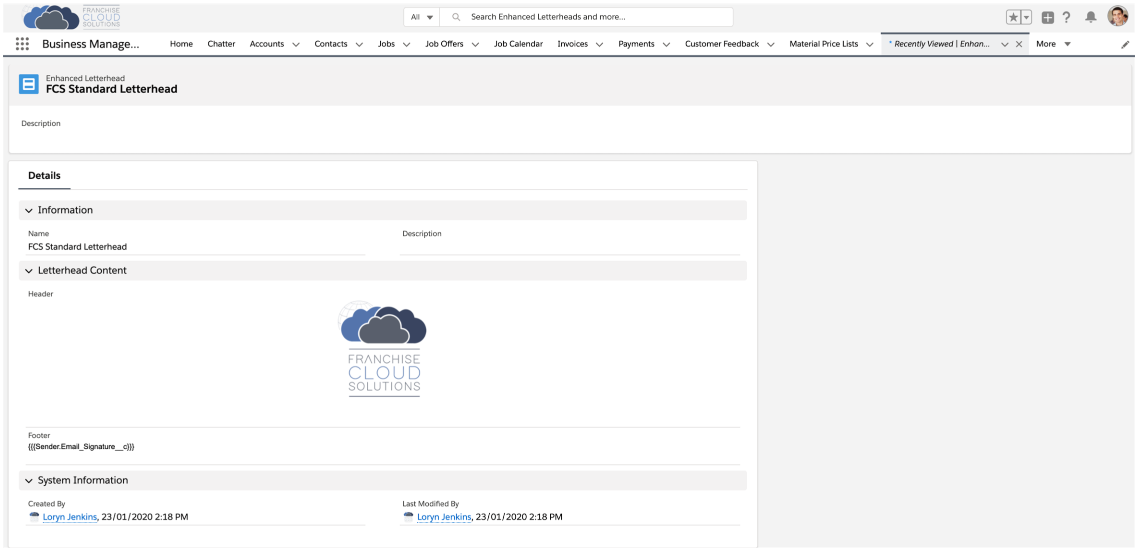
4. Name the list view and press **Save**.

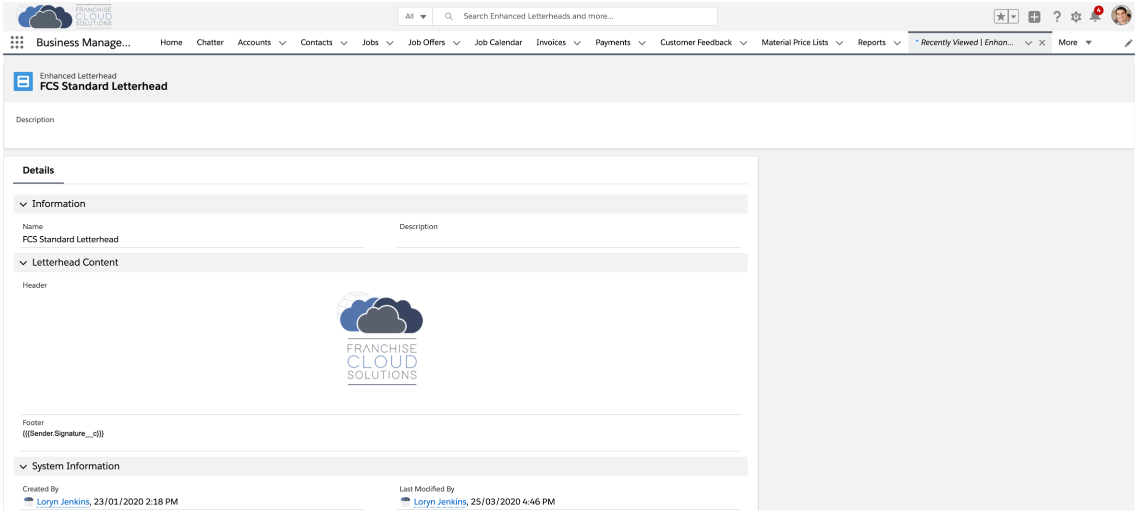


5. Now select the Standard Letterhead.



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





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

How to create a custom email template

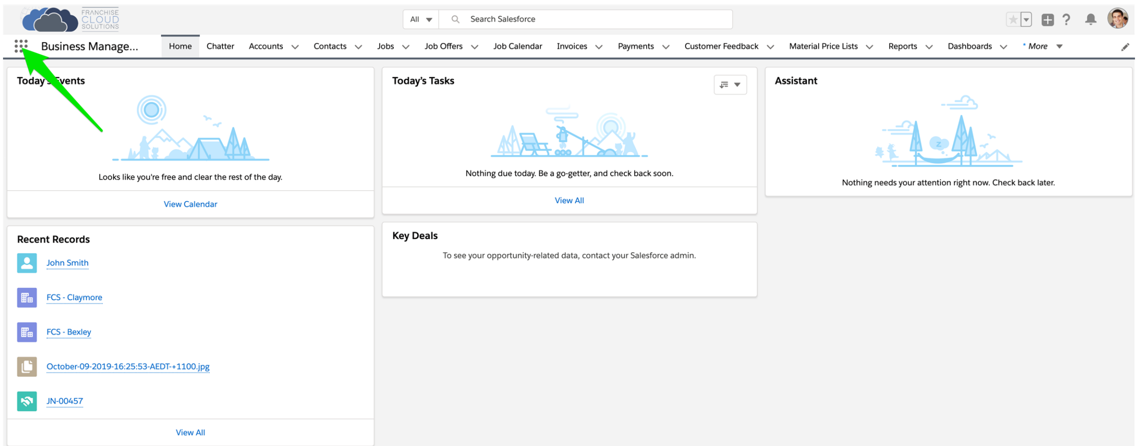
Custom email templates allow you to produce professional email communications for each standard customer touch-point. They often consist of

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

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

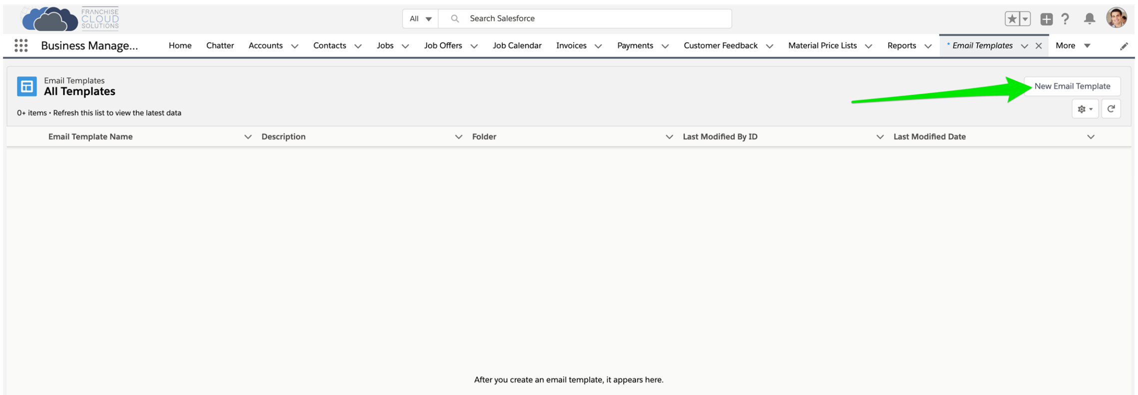
To create a custom email template

1. Open the **App Launcher**.

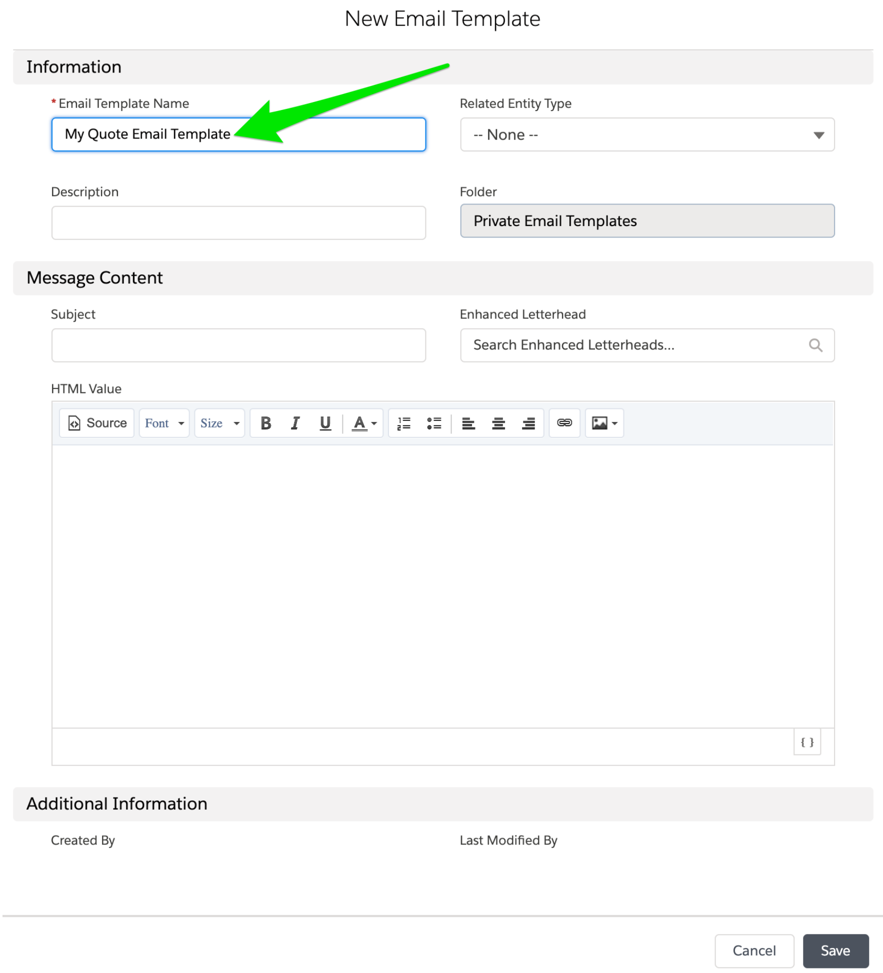


2. In the **App Launcher** `Search` box, enter *`email templates`* and select the **Email Templates** link.

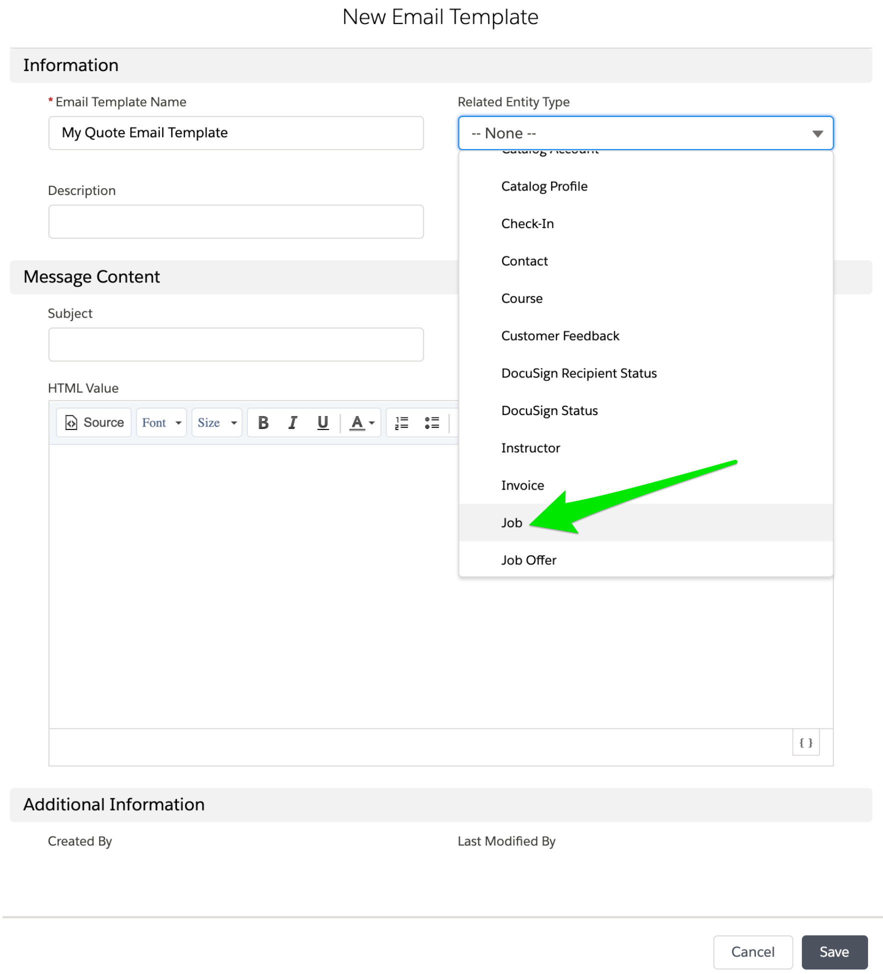
3. You may see an empty **Email Templates** list. Press **New Email Template**.



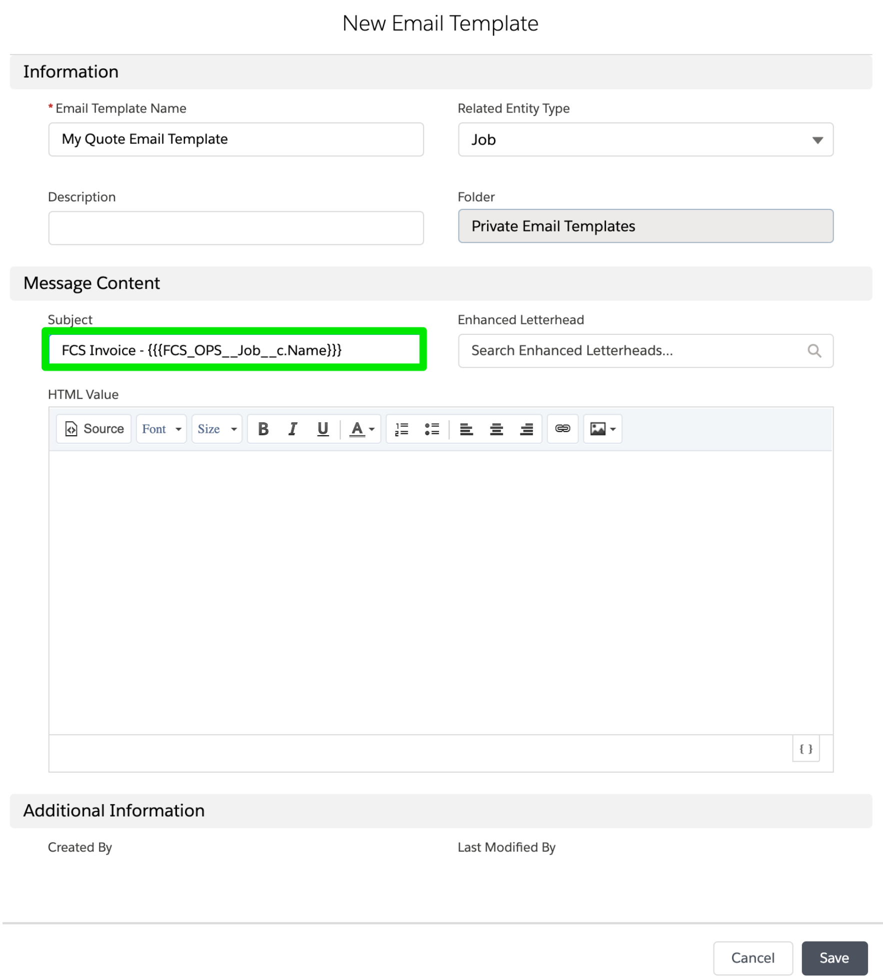
4. Insert an email template name that will help you identify it.



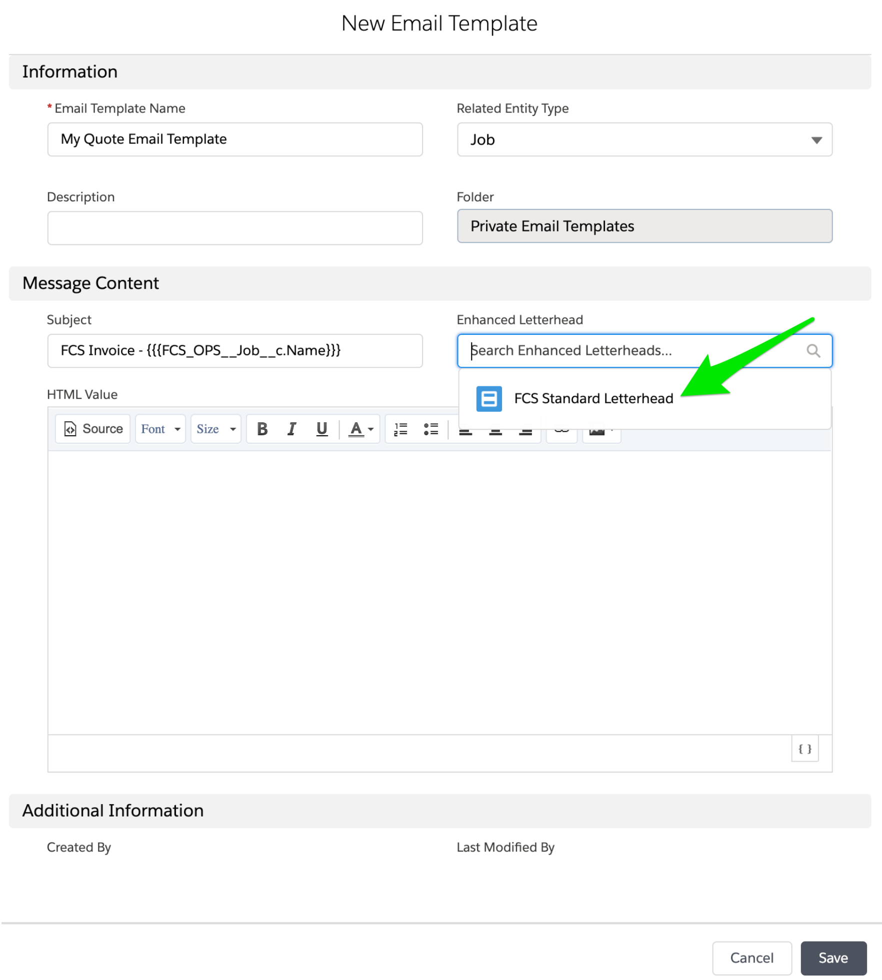
5. If you are going to use merge fields, you must base the email template off a particular entity type.



6. Enter an email subject line.

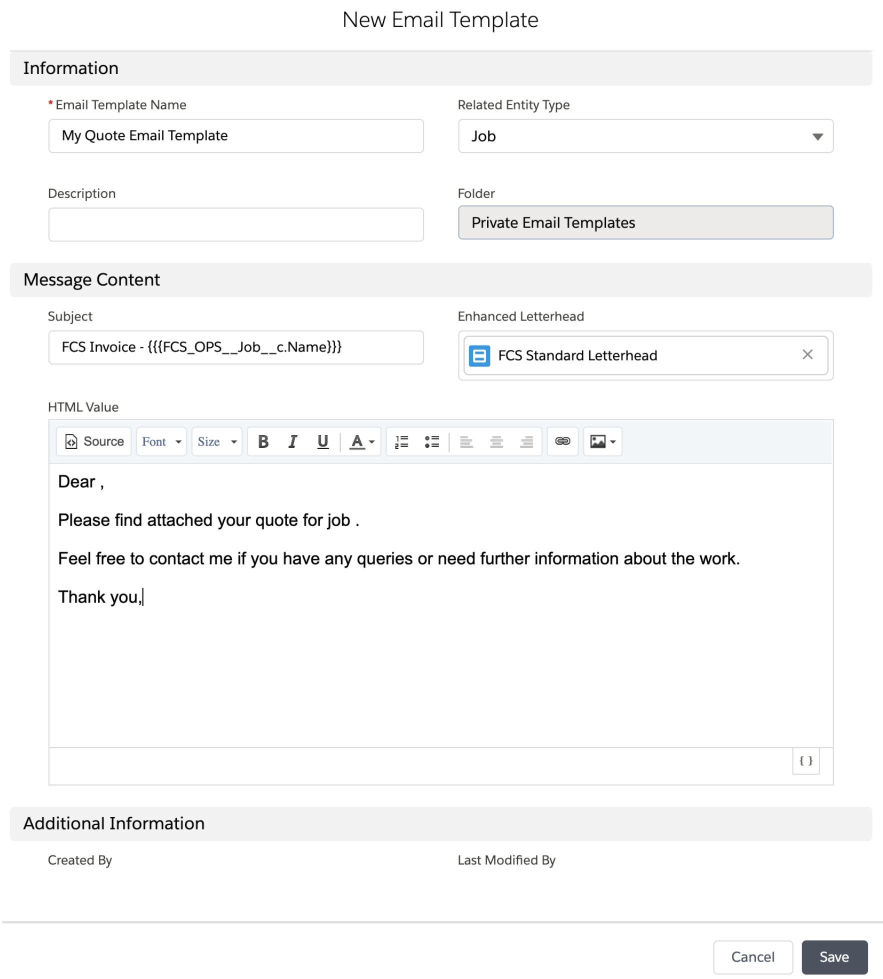


7. Select an appropriate letterhead.

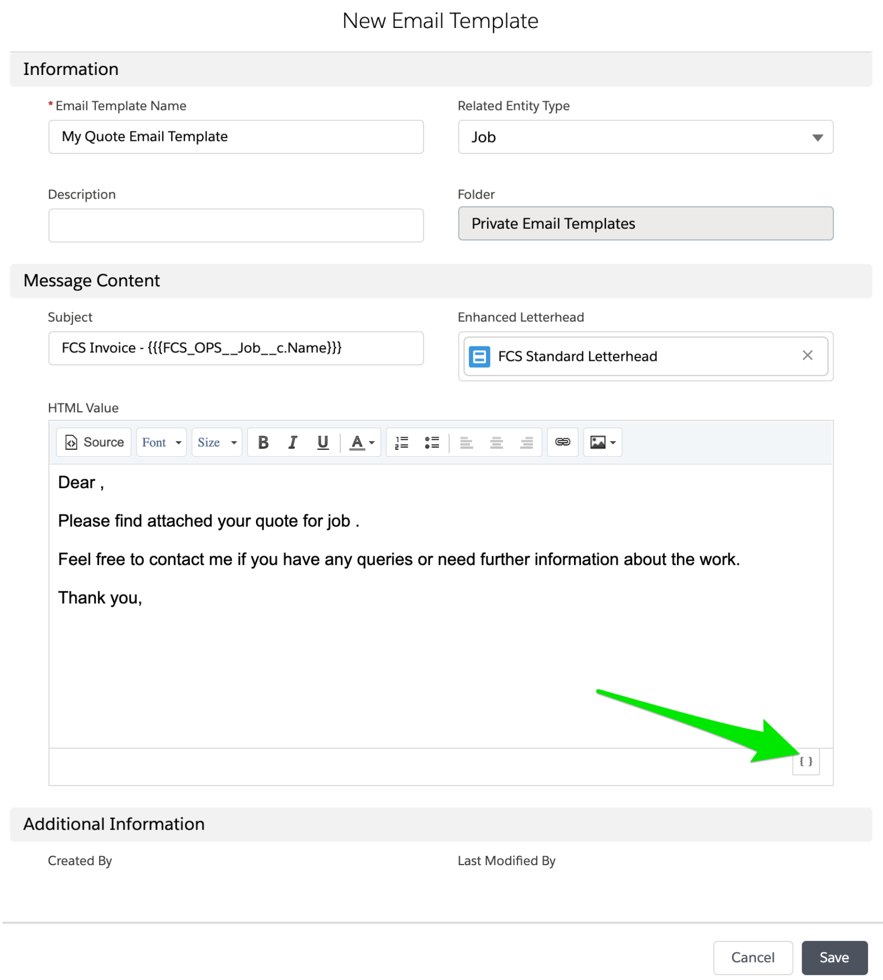


You can review the available letterheads. *See* “How to edit email template headers and footers” on page 172.

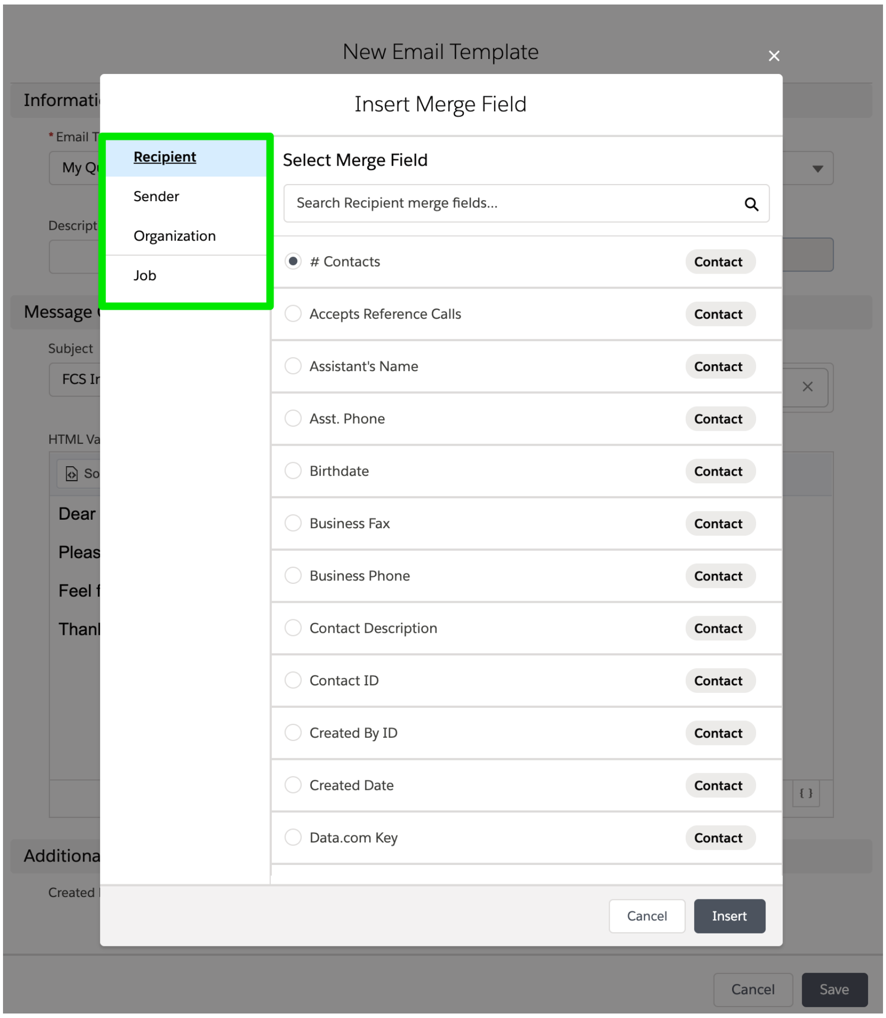
8. Enter boilerplate text into the `HTML Value` field.



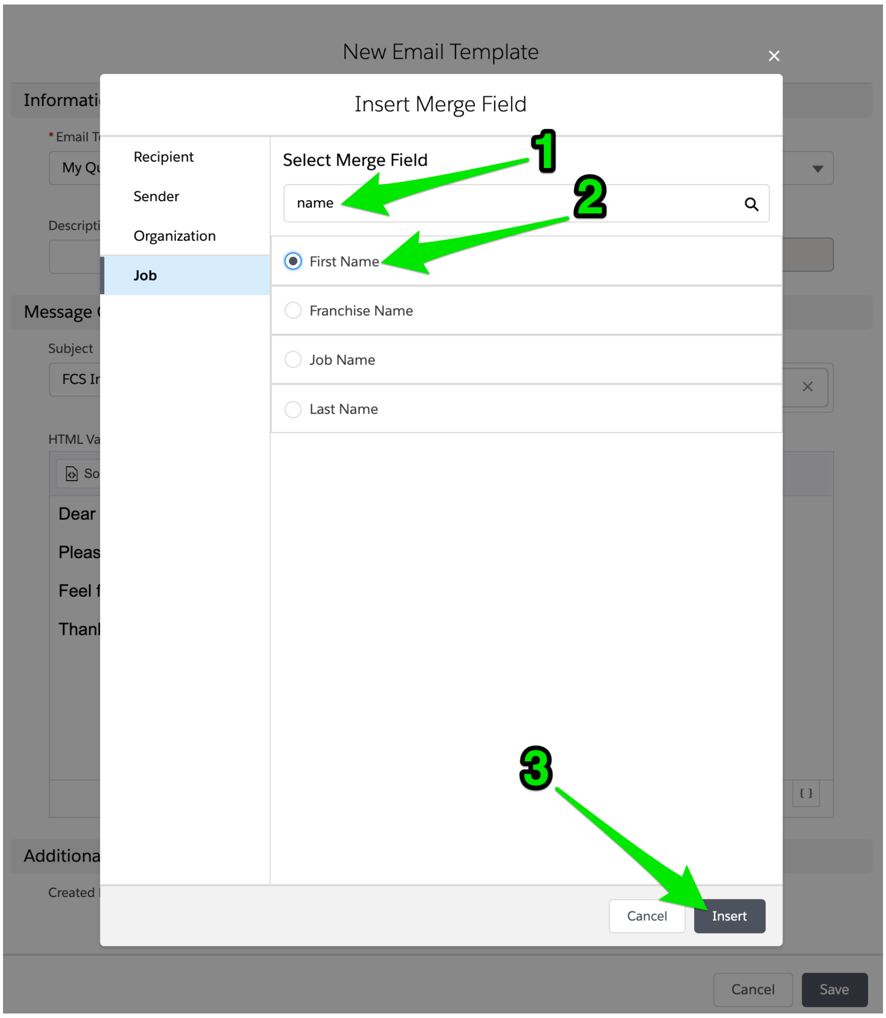
9. To insert variables into the email template body, press the **Insert Merge Field** button (i.e. the brace button { }).



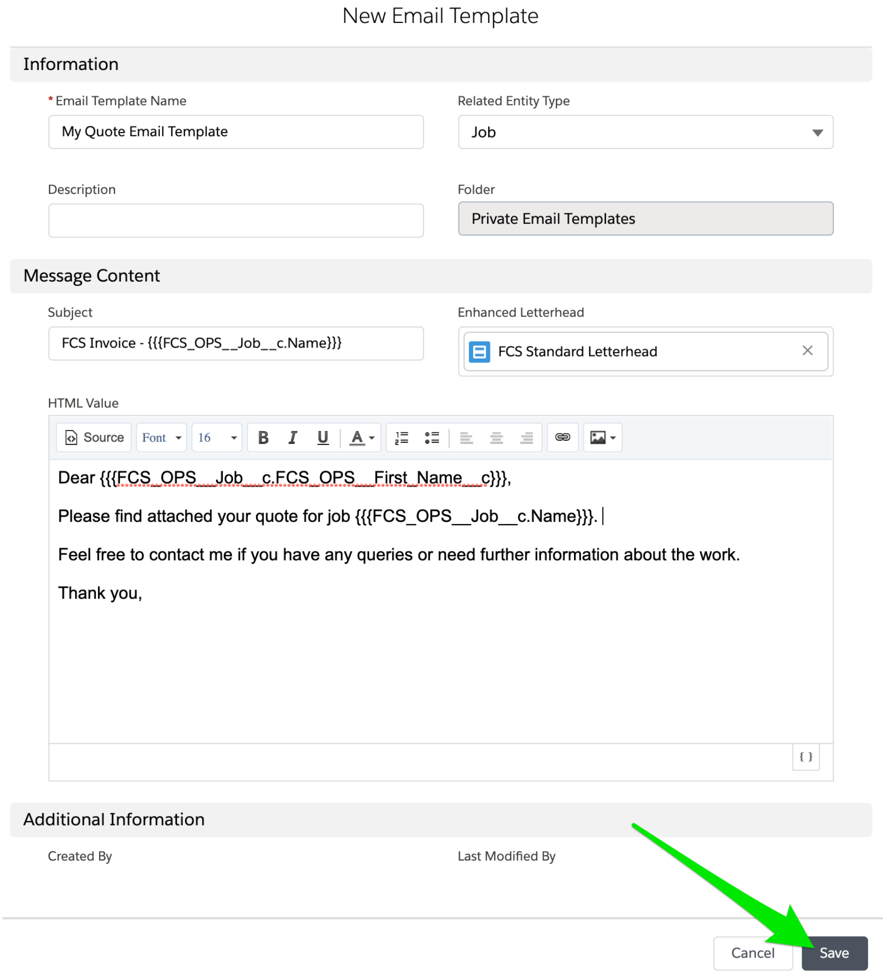
10. Select the Object Reference. Sometimes you might reference yourself (Sender) or your organization (Organization).



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



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



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

To insert a merge field into a subject line, press the Insert Merge Field button (i.e. the brace button { }) attached to the HTML Value field. Once the variable is inserted into the HTML Value field, you can copy and paste it into the Subject line.

How to 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 `Entity Type` on *`Invoice`*.

How to configure Classic Email Templates

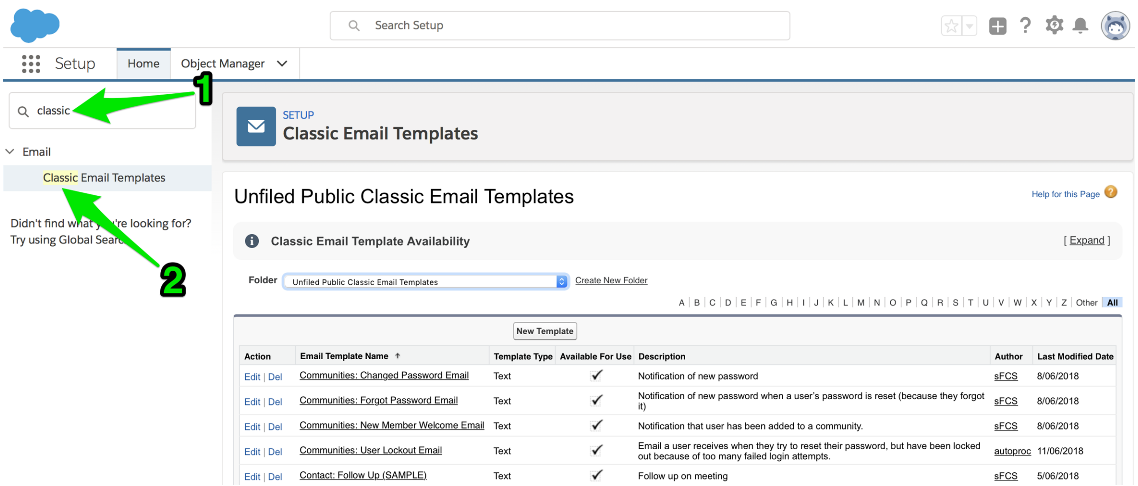
Operations Management ships with a range of default email templates. These have been configured to customer specification during implementation.

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

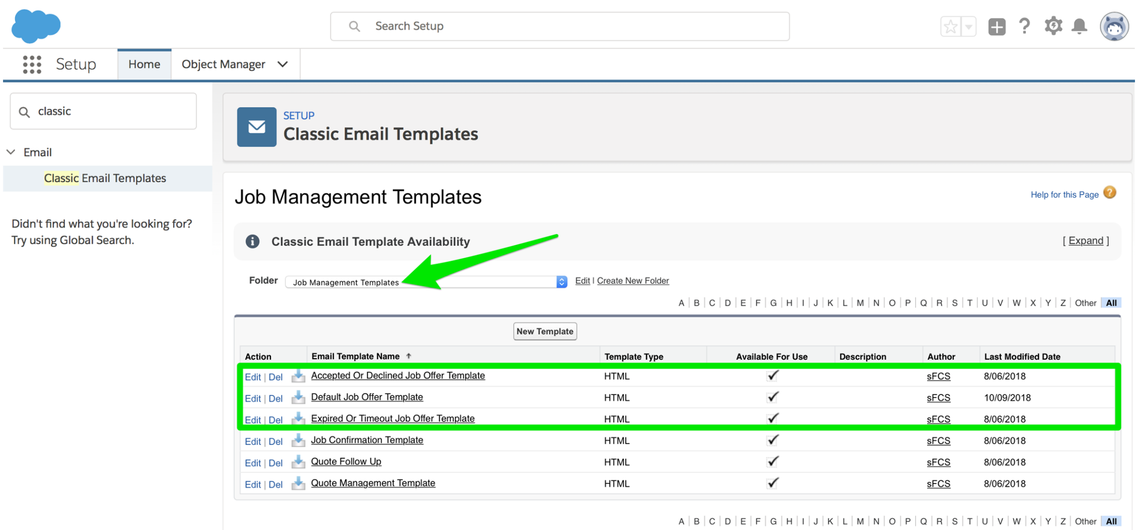
> The example below demonstrates how to access the Job Management Templates. Email templates for other categories can be edited in the same way.

To locate templates for editing

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



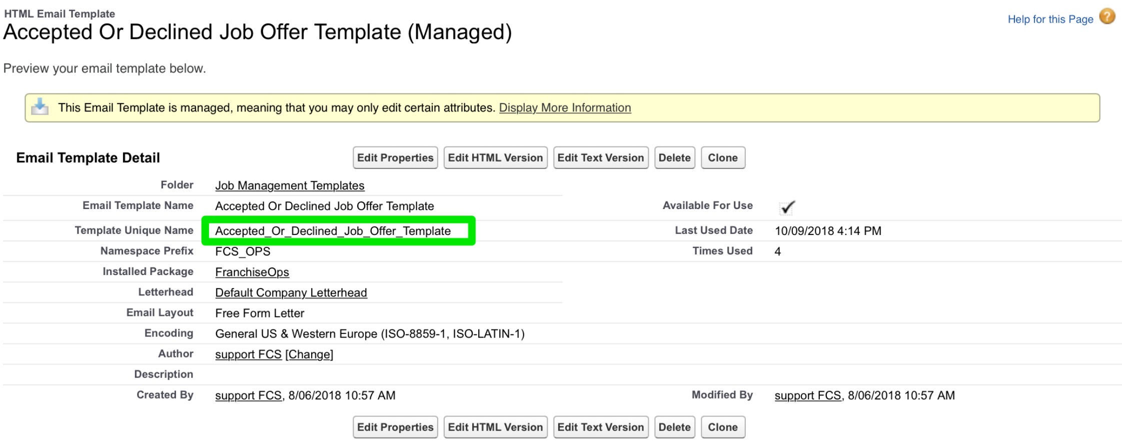
2. From the **Folder** list, select `Job Management Templates`.



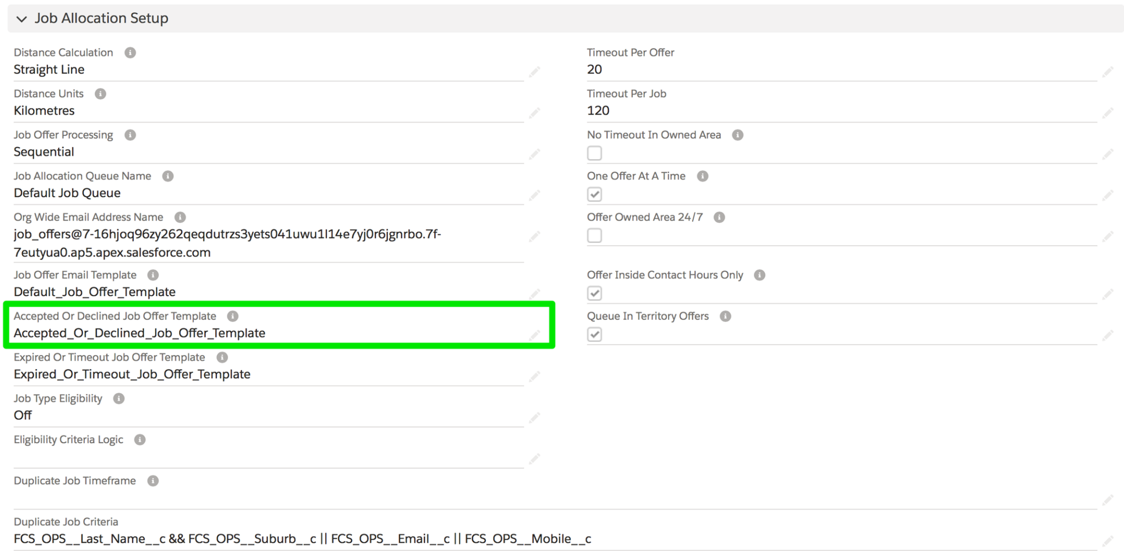
3. Edit any of the templates by clicking the `Email Template Name` link.

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`.



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



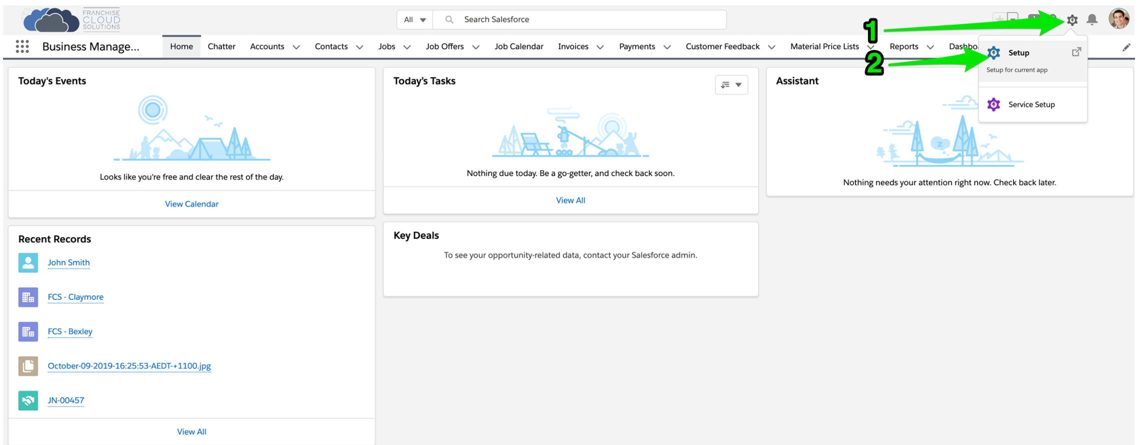
How to convert a Classic Email Template to Lightning

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.

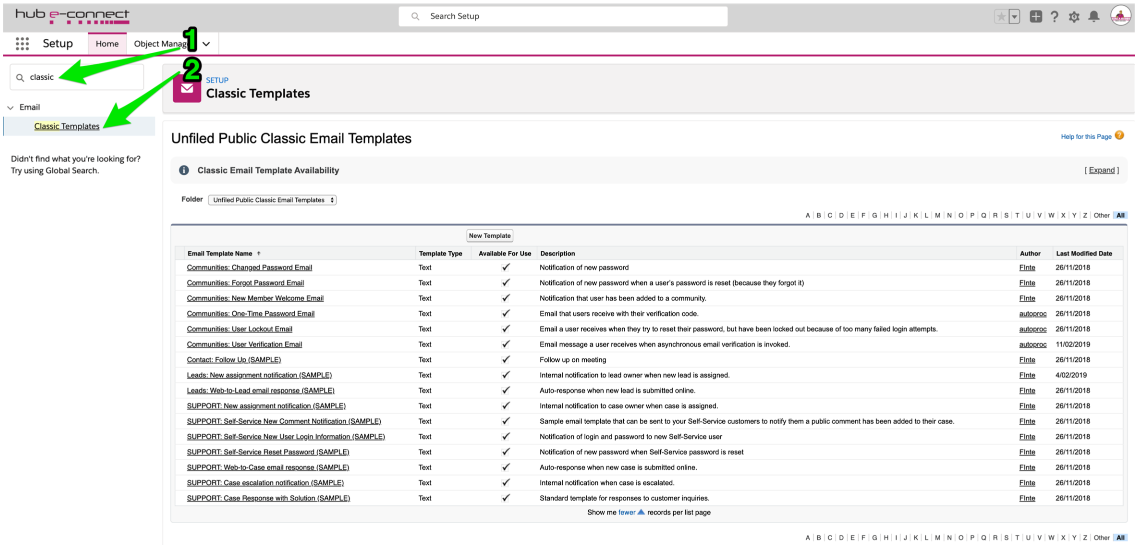
> We do not expect you to create new Classic Email Templates.
>
> - If you need to create new email templates, focus on creating Lightning Templates by working through the four linked topics in Step 1.
> - If you do have Classic Email Templates, convert them to Lightning Templates by following the instructions below.

To convert a Classic Email Template to Lightning

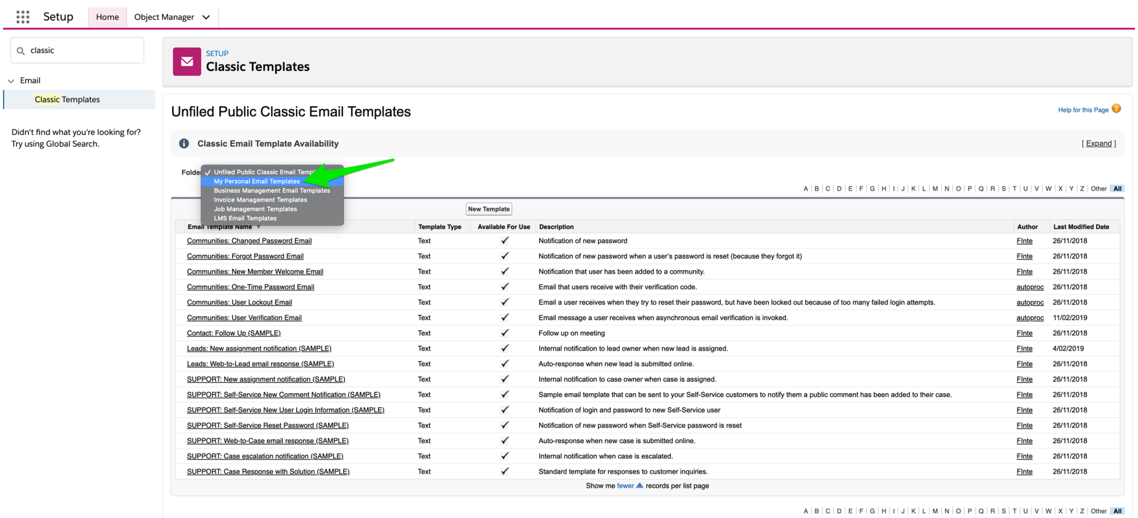
1. Review the steps for creating a Lightning Email Template. See
   - "How to edit email template headers and footers" on page 172
   - "How to create a custom email template" on page 175
   - "How to create a Quote email template" on page 186
   - "How to create an Invoice email template" on page 187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



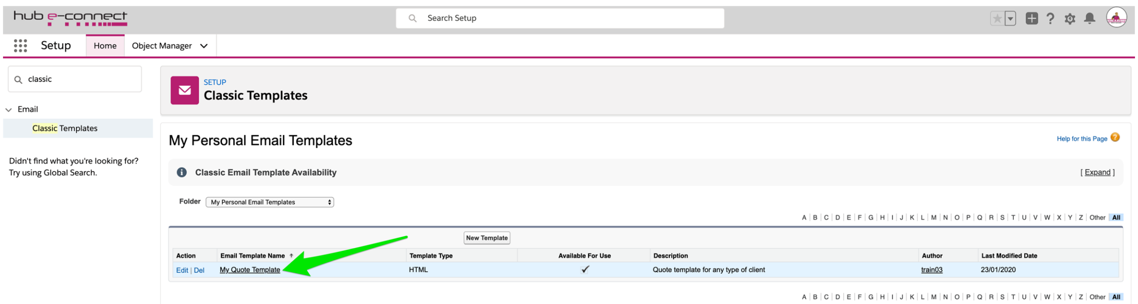
3. Using **Quick Find**, enter `Classic Templates` and select the **Classic Template** link.



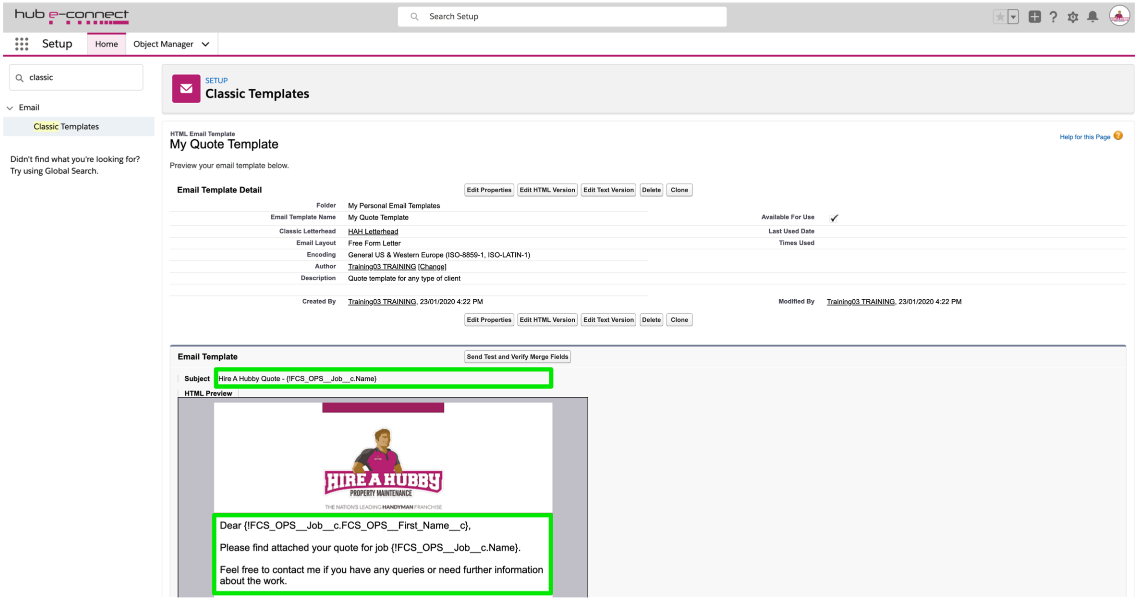
4. From `Folder`, select *`My Personal Email Templates`*.



5. Access the template you are wanting to convert.



6. 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.



7. 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

8. 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.

9. Replace the *{!* at the beginning of each merge field with a triple curly brace *{{{*

10. Replace the *}* at the end of each merge field with a triple curly close brace *}}}*

11. **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

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

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

```
/*<meta />*/

@import url('https://fonts.googleapis.com/css?family=Nunito+Sans');

@font-face
{
   font-family: 'Nunito Sans Light';
   src: url(../Fonts/NunitoSans-Light.ttf);
}

@font-face
{
   font-family: 'Nunito Sans Regular';
   src: url(../Fonts/NunitoSans-Regular.ttf);
}

:root
{
   --BrandFont: 'Nunito Sans Regular', sans-serif;
   --BrandColor: #073763;
   --HeadingColor: #0a5394;
   --TextColor: #666666;
   --TextInverse: #FFFFFF;
}
```

3. If you wish to provide you 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

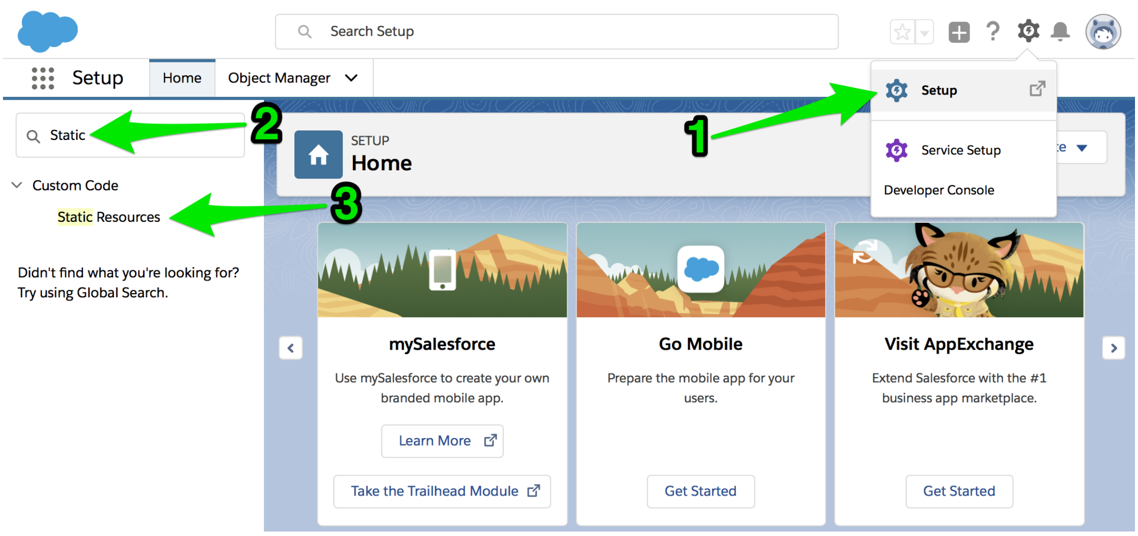
By now you should have all the files you need to create the QuoteLanding static file.

- 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**

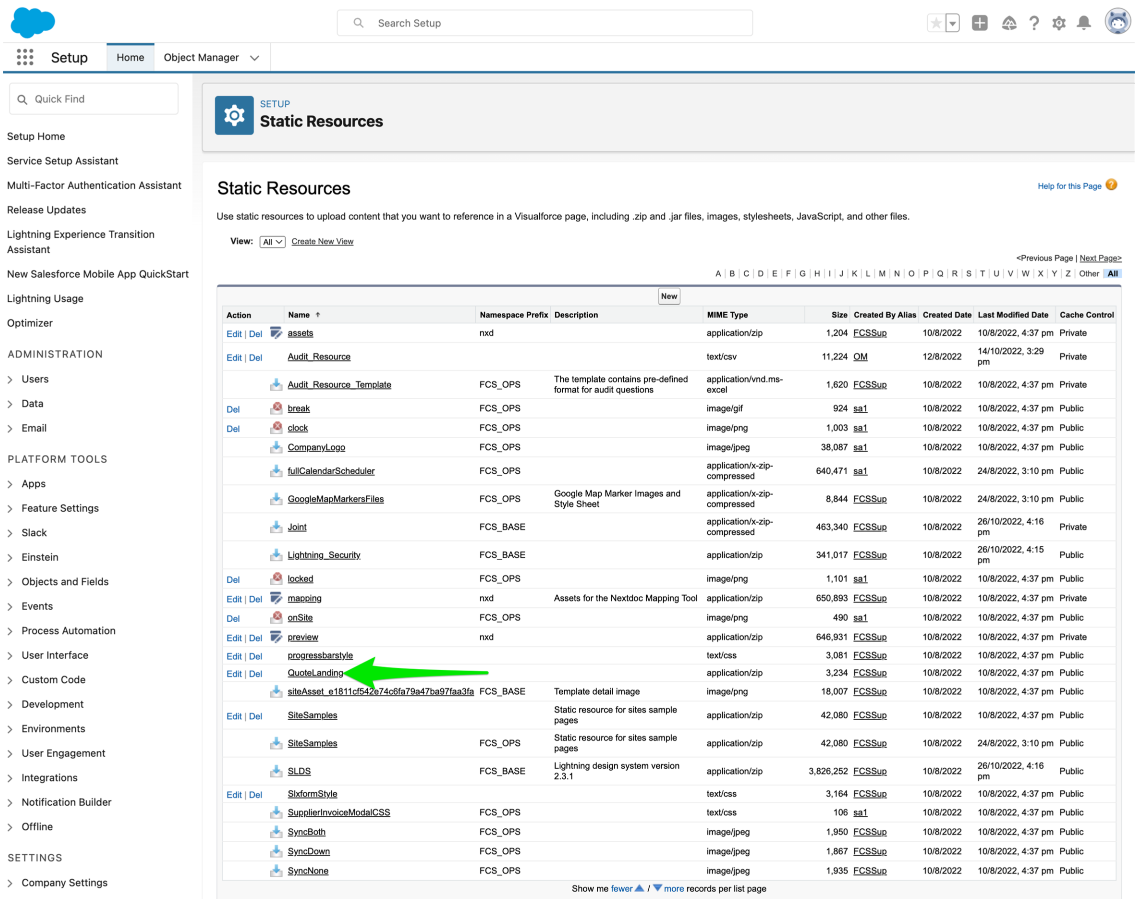
If this is what you've got, you're ready to create and upload the QuoteLanding static file.

Update the default QuoteLanding static file

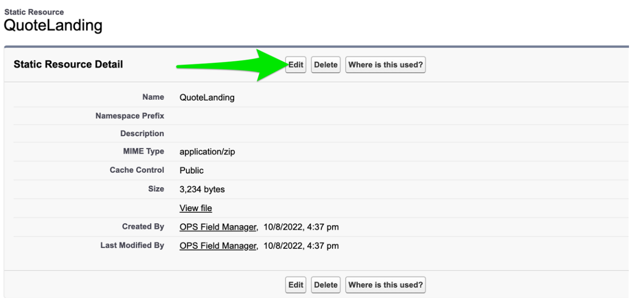
1. In your file system, move to a position "above" your brand folder. Select your brand folder and, using your zip utility, zip it. Name the zip file **QuoteLanding.zip**.
2. Now, in Salesforce, go to **Setup** and search for `Static Resources`.



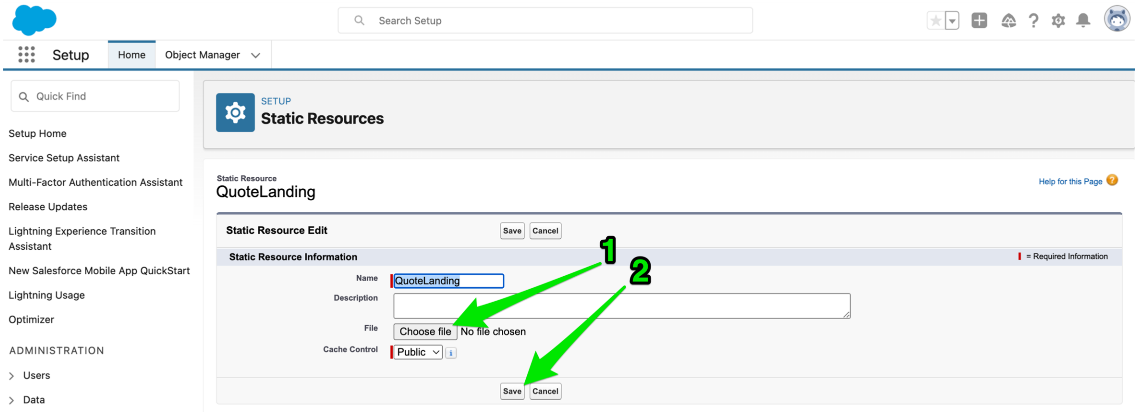
3. Click on the `QuoteLanding` link.



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



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



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

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

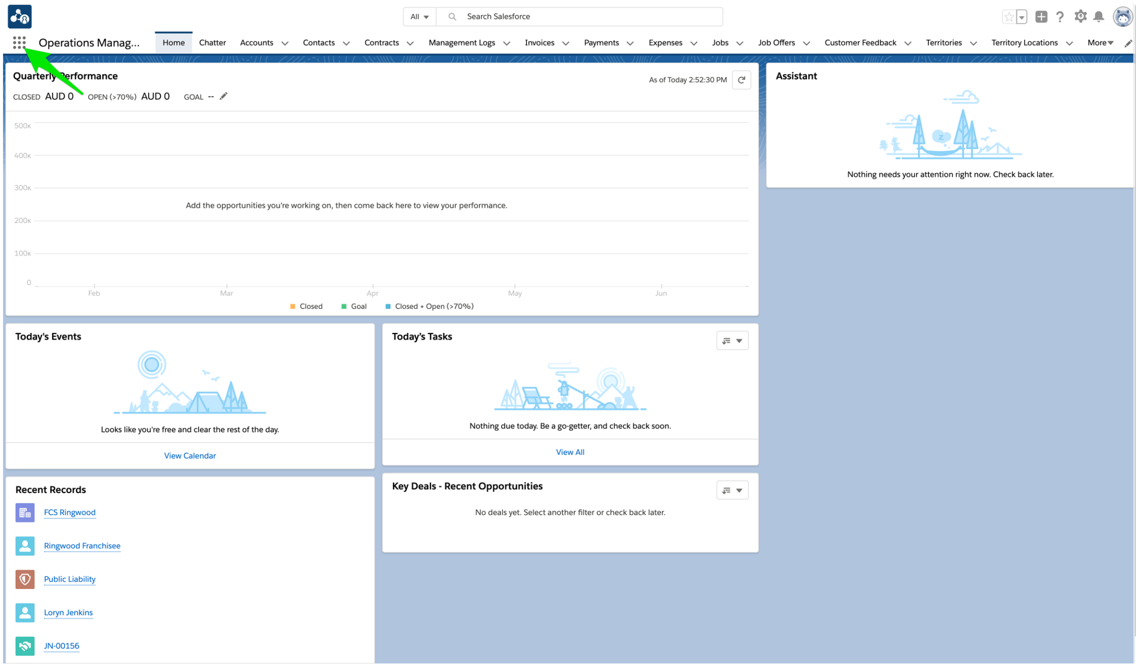
Managing Other Data

How to add a job source

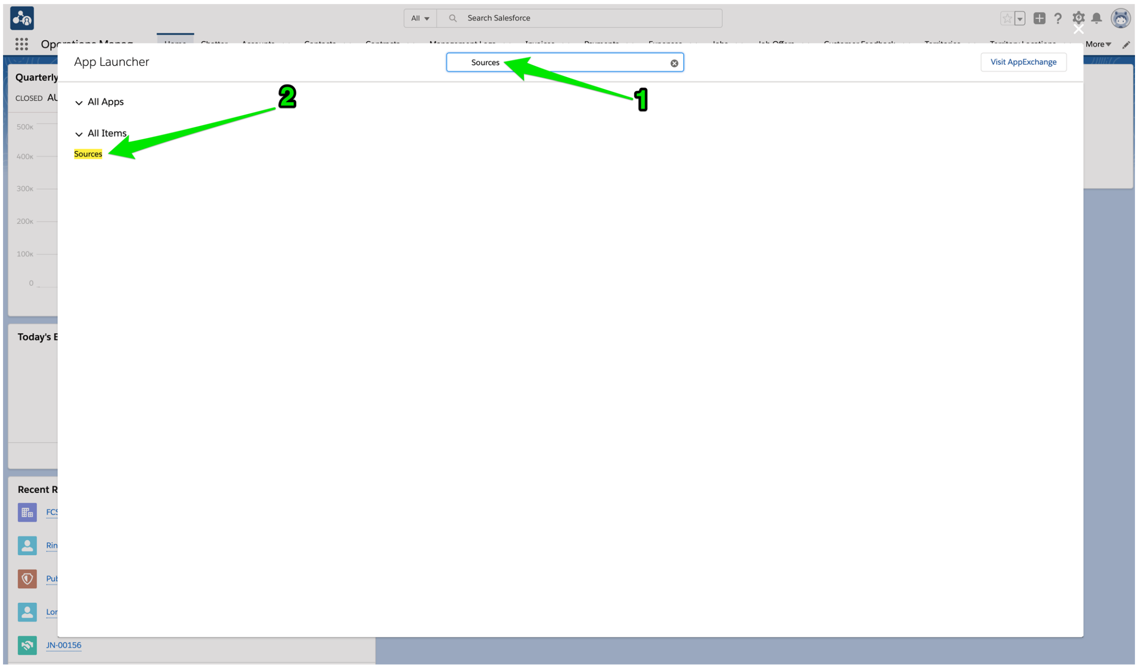
Job Sources fill the job creation form's "How did you hear of us?" drop down list. Adding or disabling Job Source items determines which items are presented to the general public.

To add a job source

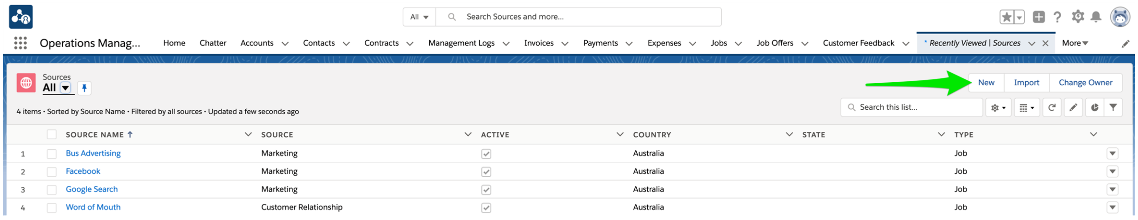
1. Select the Salesforce App Launcher.



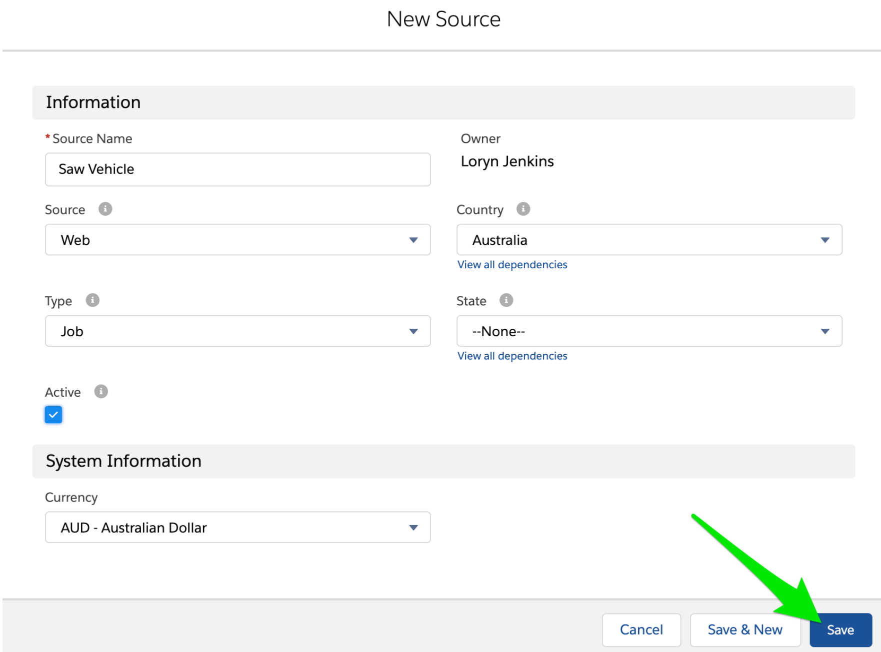
2. Using the search box, search for `Sources`, and select the **Sources** app.



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**.



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.

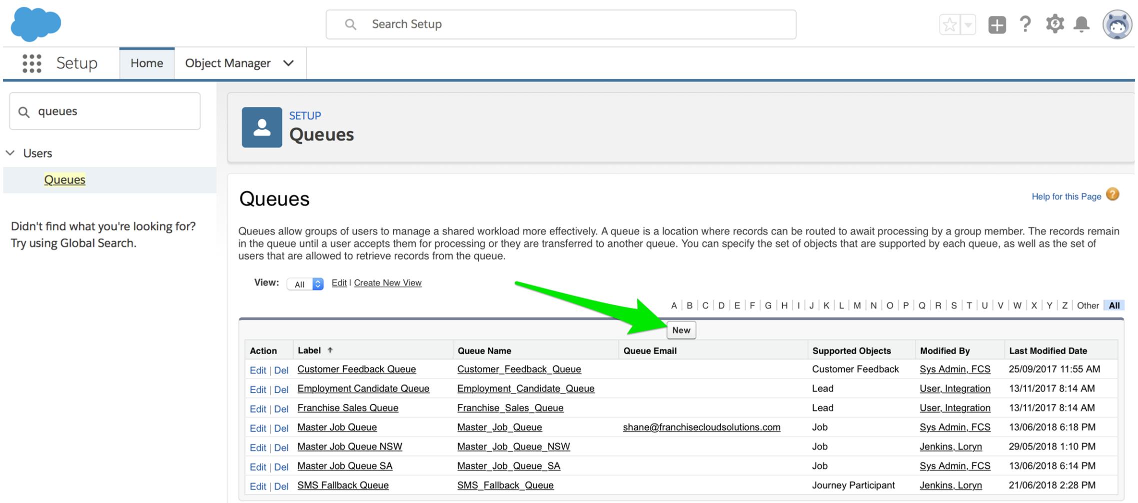
Field	Description
Source Name	The name of the source item. Can be seen by the general public.
Type	Determines whether this item is connected to the Create Job form.
Source	Tracks the job source origin by medium.
Active	Determines whether this item is visible.
Country	If Country is selected, appears in 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

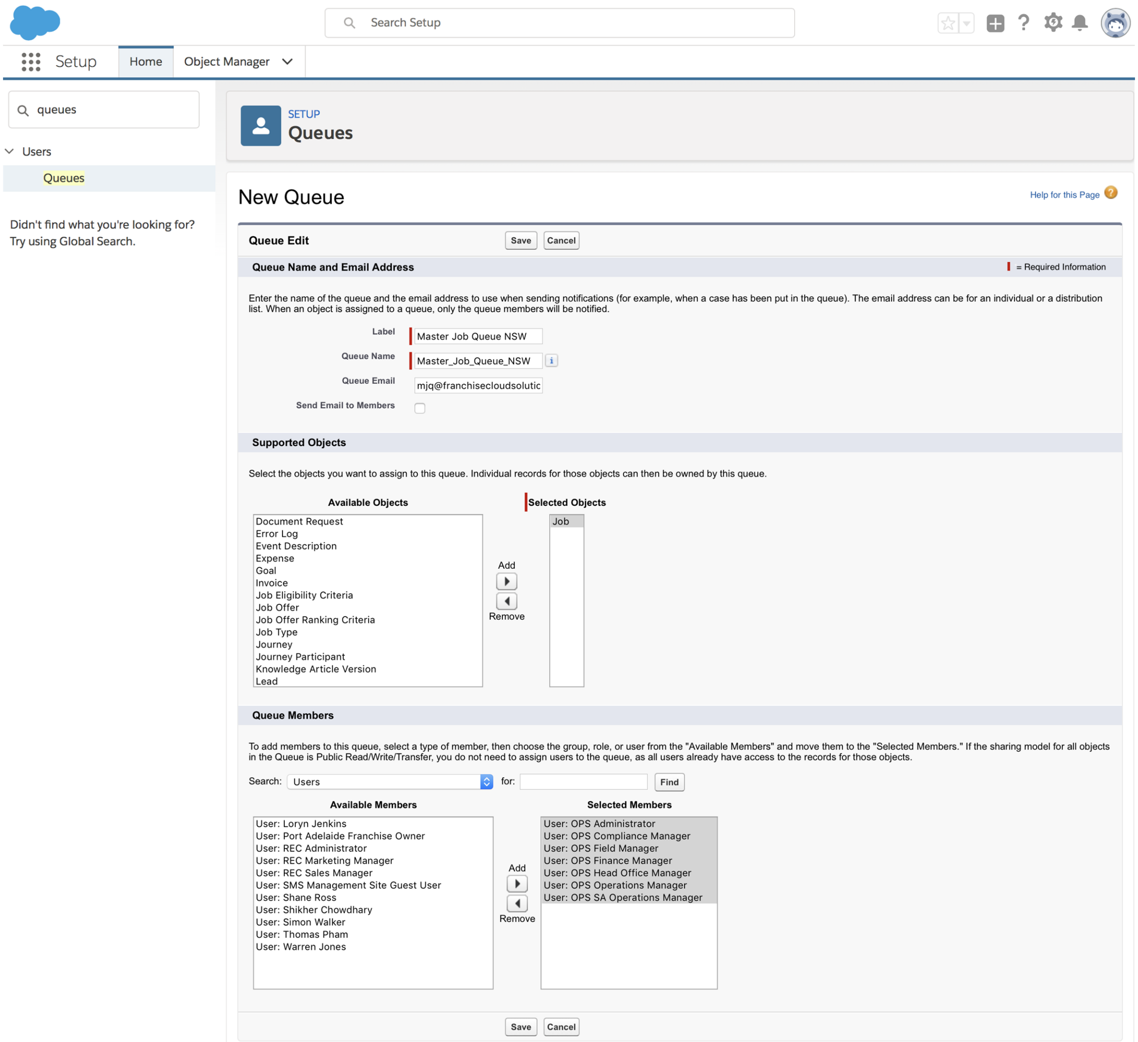
In Salesforce, records must be owned by either a User or a Queue. When a record is created by a process outside of Salesforce, or needs to be worked on by any of a group of people, it makes sense for that record to be owned by a queue.

To create a queue

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



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



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

b. Optionally enter a `Queue Email`.

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

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

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

f. Press **Save**.

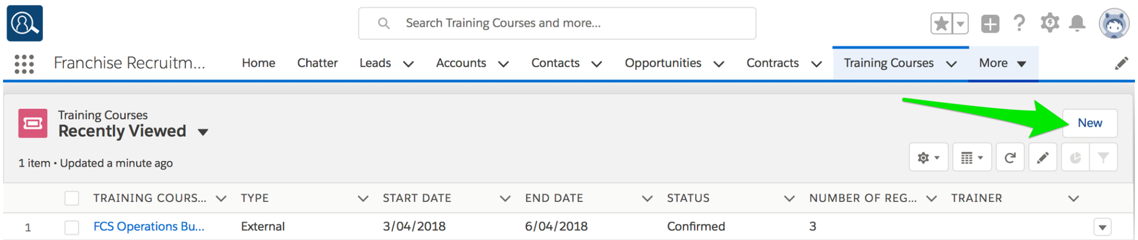
How to create a training course

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.

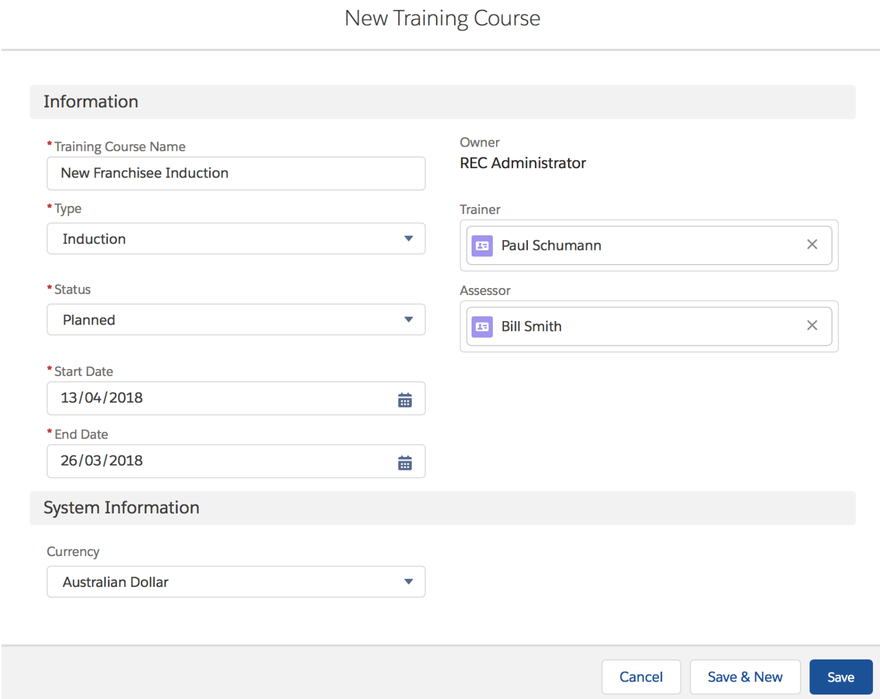
Once a course is created, users can register attendees.

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**.



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.

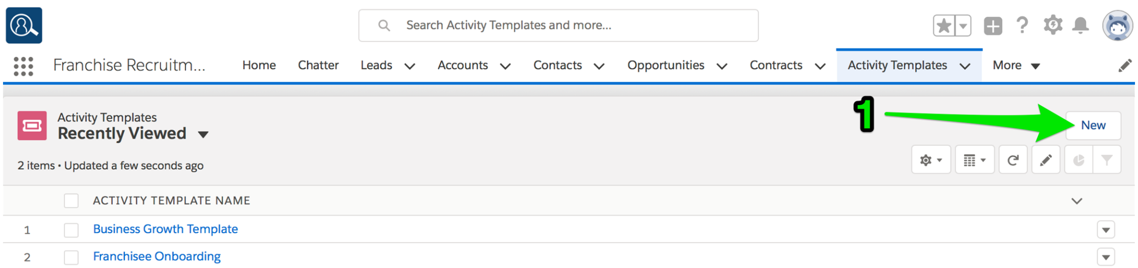
How to create an activity template

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.

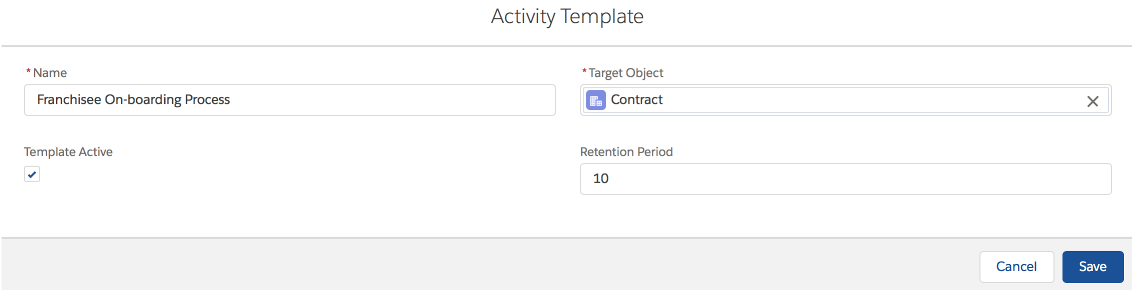
> Activity Lists can be attached to any object that:
>
> » is configured for activities (i.e. has an activity history)
>
> » is not a User, Lead or Contact

To create an activity template

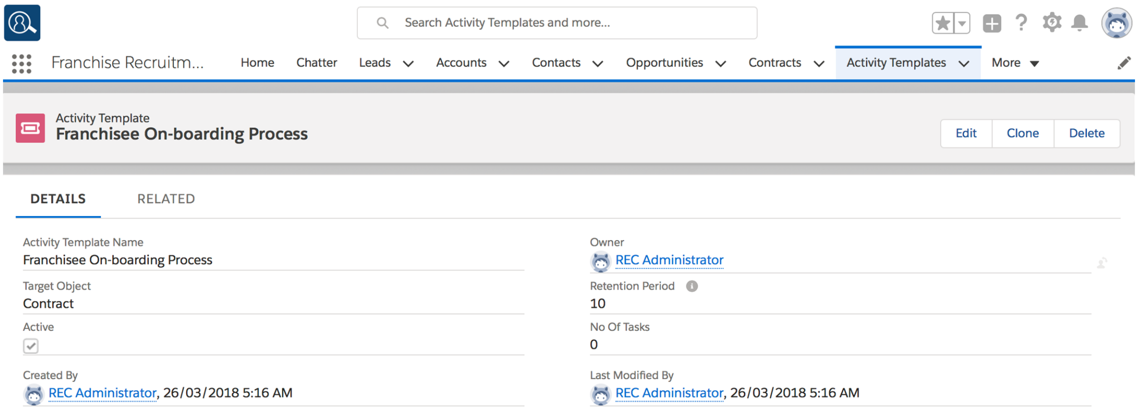
1. From the Salesforce menu, choose **Activity Templates**.
2. To create the template, press **New**.



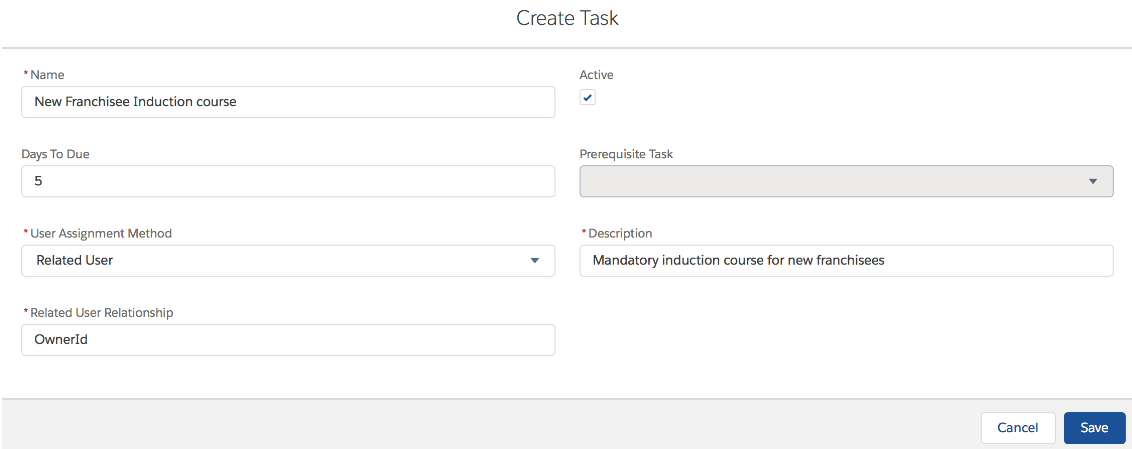
3. Name and target the activity template, then press **Save**.



The Activity Template header displays.



4. From the **Related** tab, create a **New** activity list.
5. From the **Create Task** dialog box, complete the task details and press **Save**.



The task is added to the activity list.

6. 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 **Manager** field to be filled.

Related User queries must return user ids

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

Searched User Example

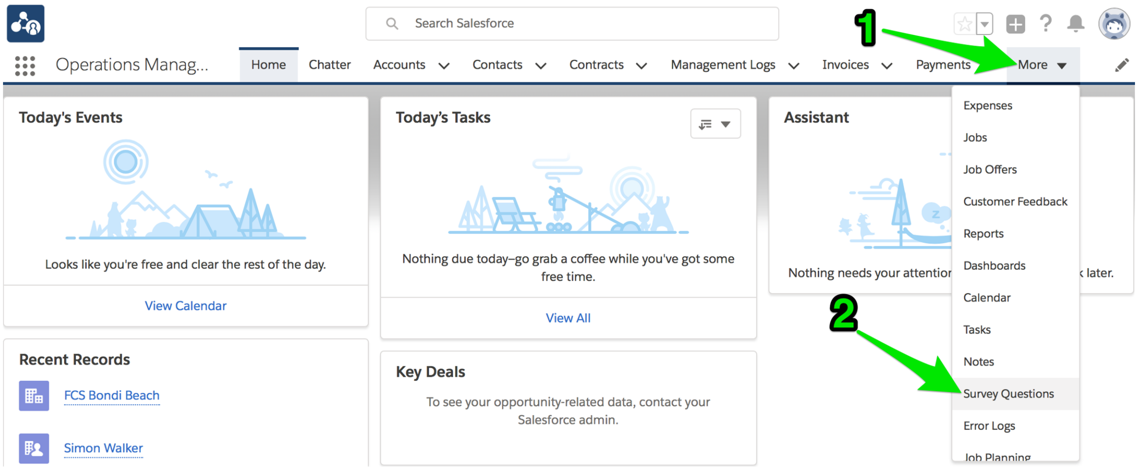
The example below is based on the Account object. It uses packaged and custom fields.

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".

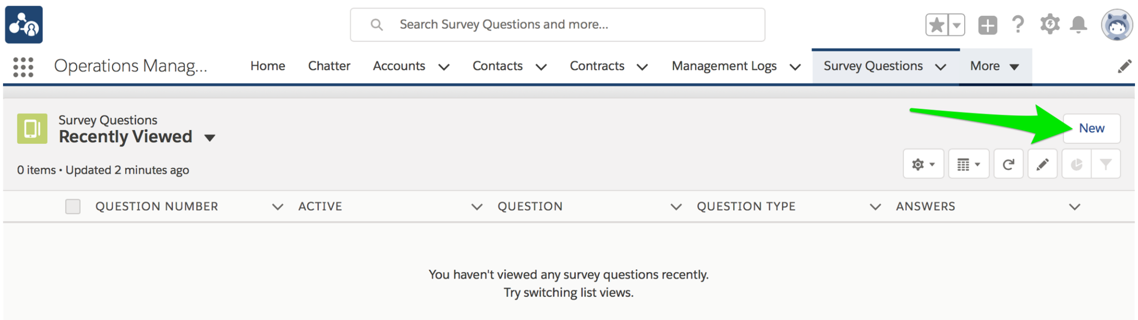
How to create job satisfaction survey questions

To enter a job satisfaction survey question

1. From the Salesforce menu, select **Survey Questions**.

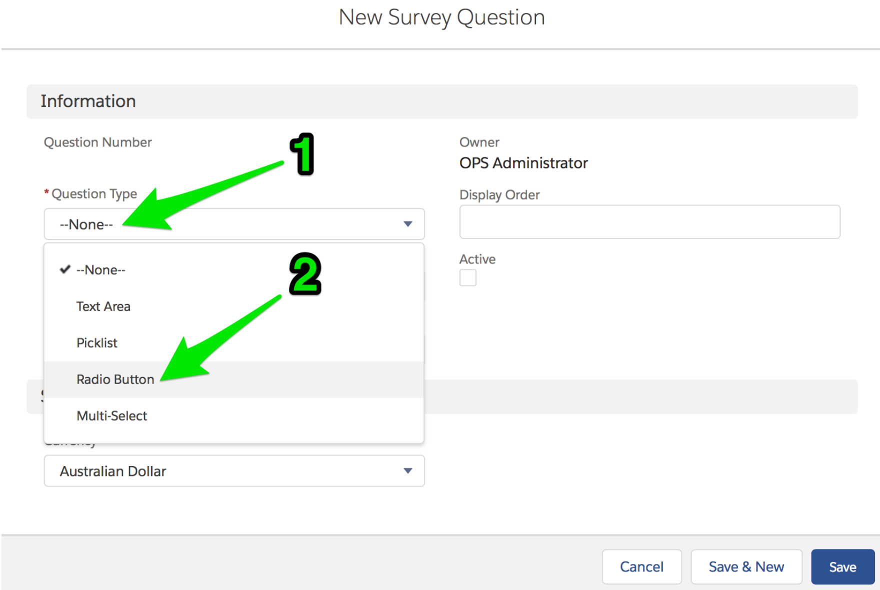


2. From Survey Questions, press **New**.



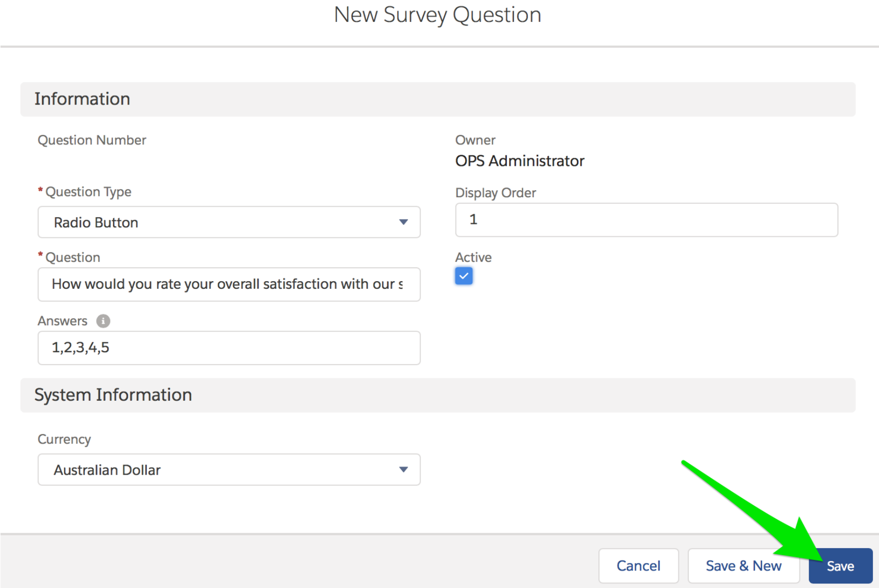
The **New Survey Question** dialog box appears.

3. Select the `Question Type`.

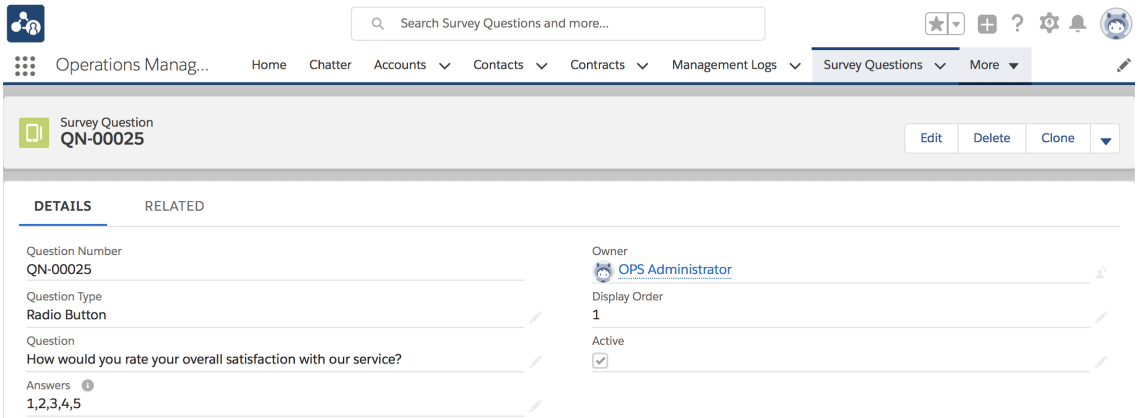


Each question type will present answers to the question in a different format.

4. Write the `Question`. Enter each `Answer` as a comma-separated string. Complete the remainder of the question details, then press **Save**.



The completed **Survey Question** record displays.



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.

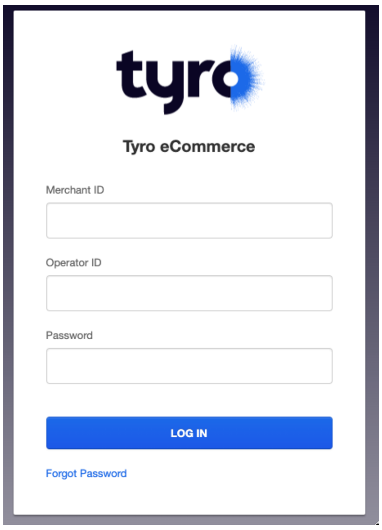
To generate a Tyro API Key

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>

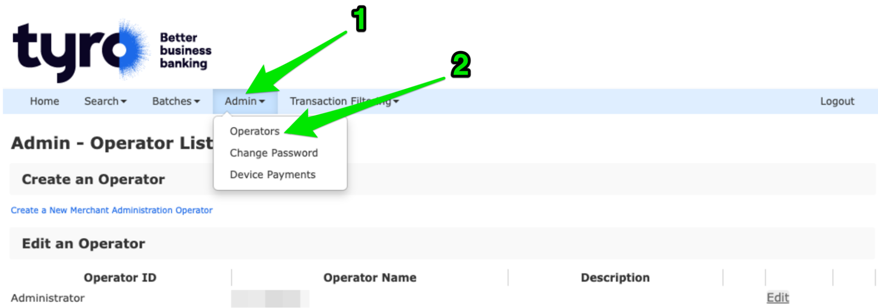
   The password will expire in 24 hours.

2. Using three pieces of information in step 1, you log into the account.

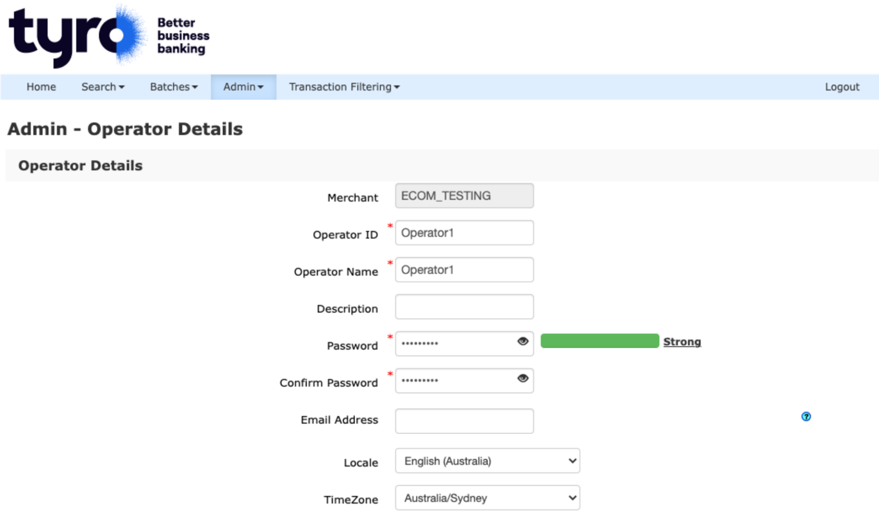


> You will be prompted to reset the password.

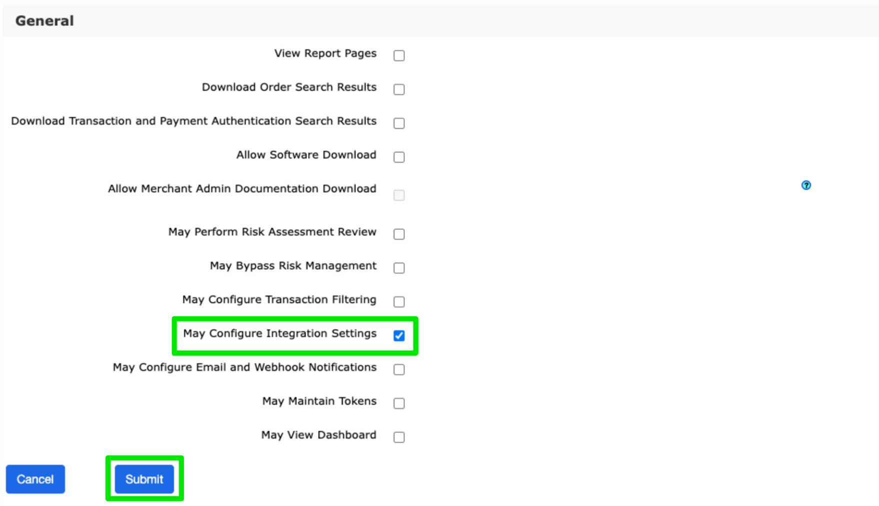
3. Navigate to the operators page by clicking **Admin** in the top menu, then clicking on **Operators**.



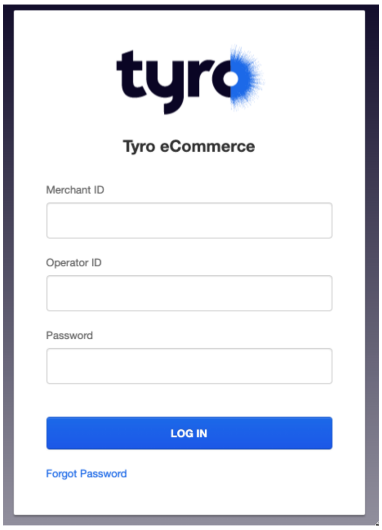
4. Create a new Operator. Click on **Create a New Merchant Administration Operator**. Complete all required fields.



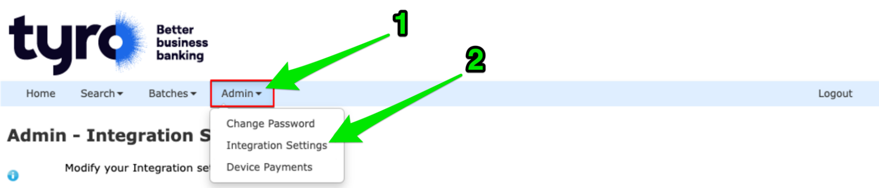
5. Assign the user rights. Ensure you assign **May Configure Integration Settings**. Once assgined, select **Submit**.



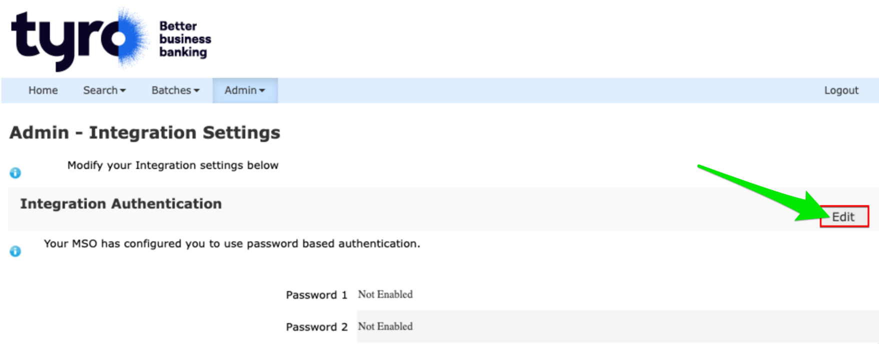
6. Using the newly created Operator user ID, log in to the [Merchant Administrator Portal](#).



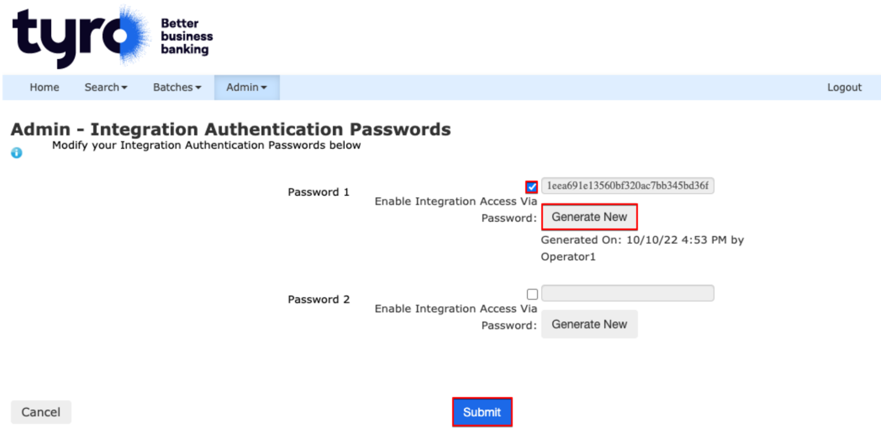
7. Navigate to **Integration Settings**. Using the top menu access **Admin**, then **Integration Settings**.



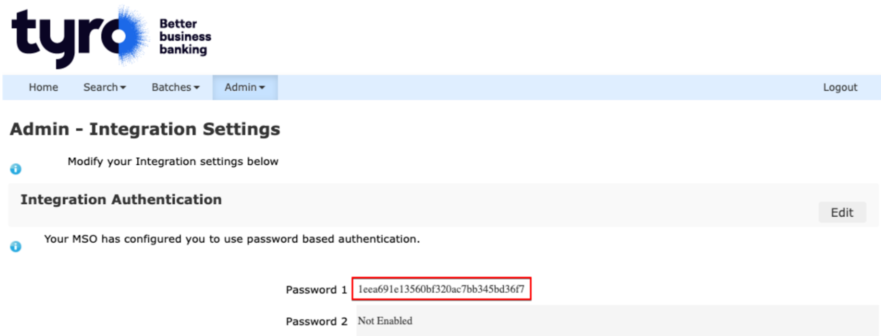
8. Access Integration Authentication. Click the **Edit** button on the right-hand side of the **Integration Authentication** section.



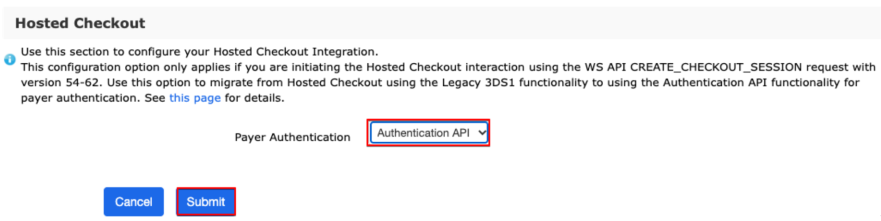
9. Generate an API Key by checking the box next to **Password 1**, then clicking **Generate New**. When complete, click **Submit**.



10. Copy and store the API Key ready for sending to the franchisee.



11. From the **Payer Authentication** drop down, select `Authentication API`. When complete, click **Submit**.

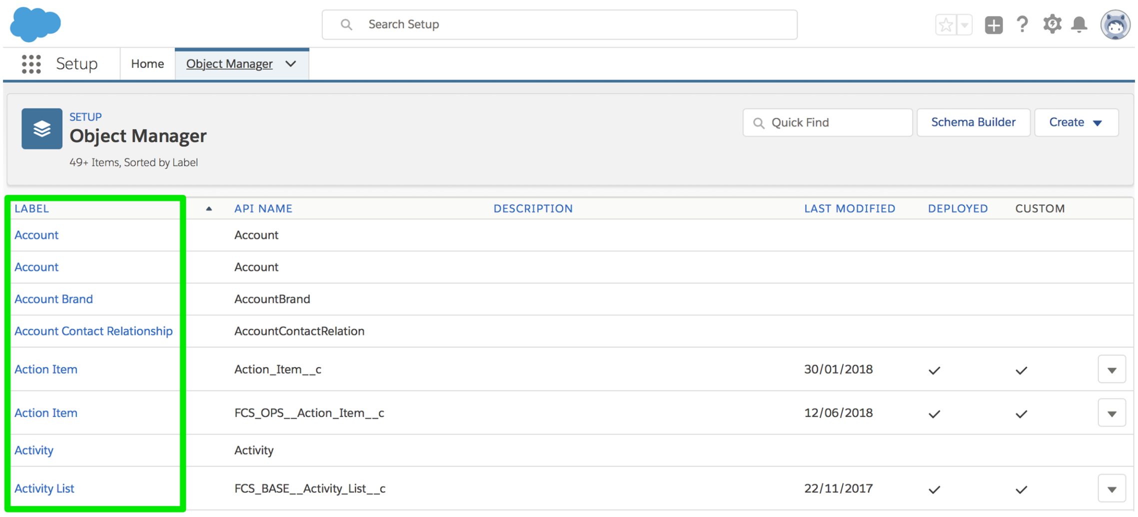


How to identify a Field API Name

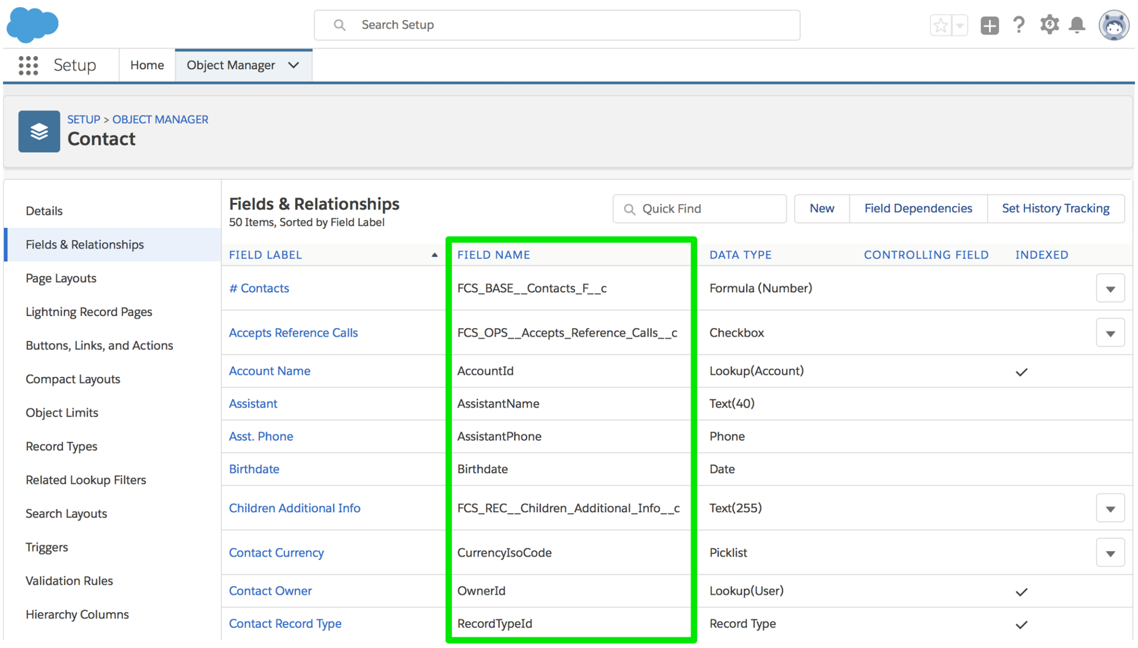
The Field API Name is a unique name that identifies a field.

To determine Field API Names for custom fields

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



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



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.

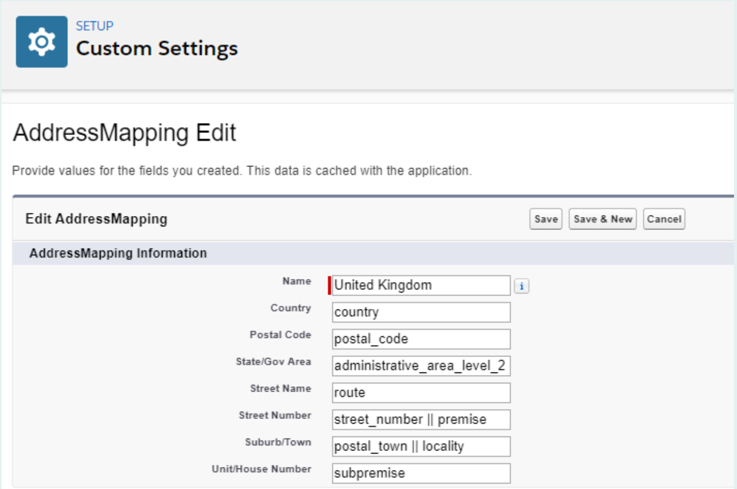
To learn how to use Data Loader

- 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.



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

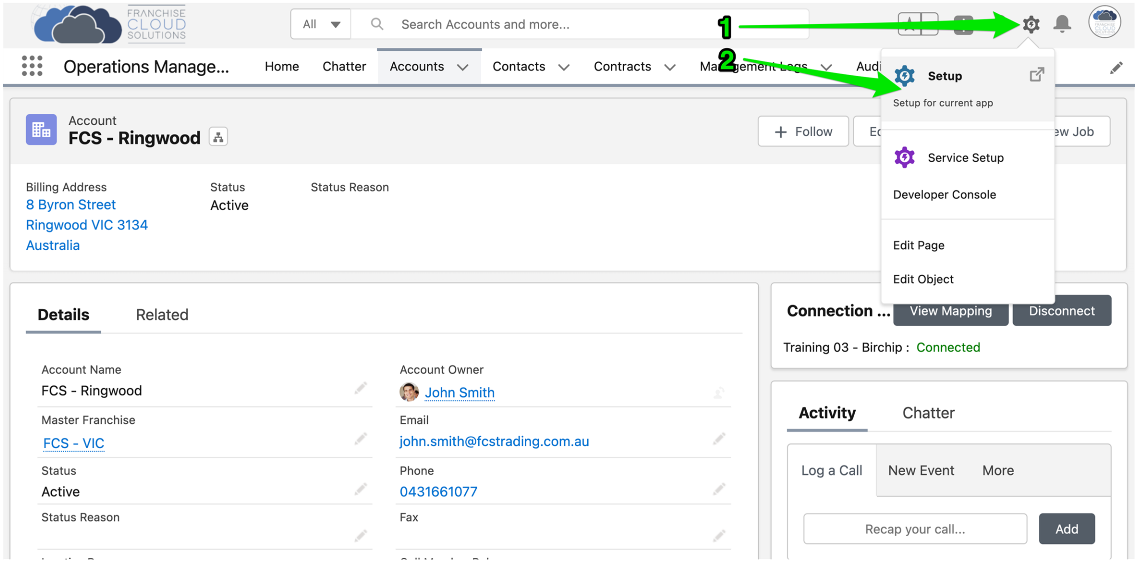
When multiple franchise profile accounts are being synced to a single Xero account, you will want to ensure the invoice and credit note sequences are distinct within Xero. You will generally need to set the starting numbers and ensure the accounting sequence is shared between all franchise profile accounts that sync to the Xero account.

Setting organization-wide custom formats

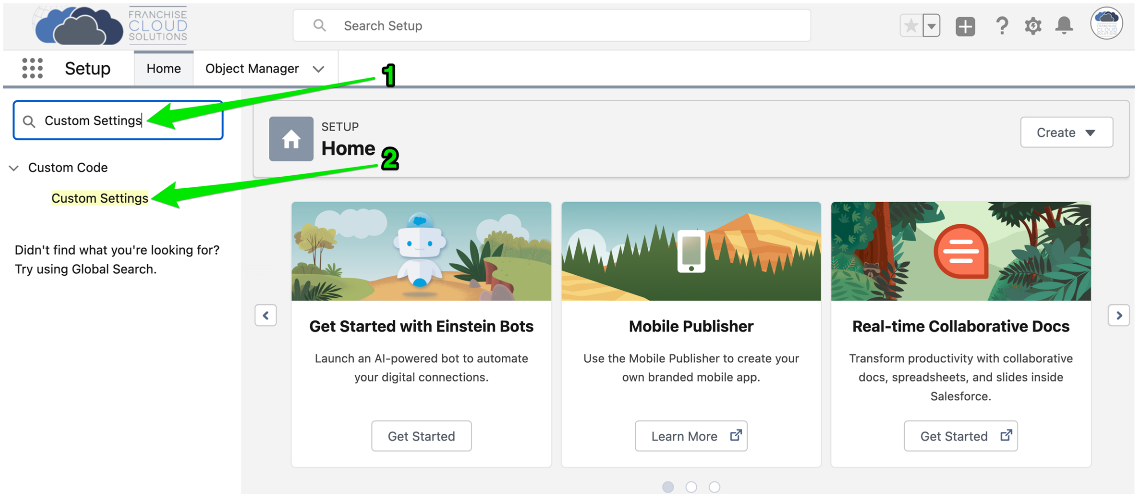
Operations Management uses INV-000NN, QN-000NN, and CN-000NN by default. If you'd like your invoices to use a different convention, you can set an org-wide default.

To locate a franchise profile account's accounting sequence

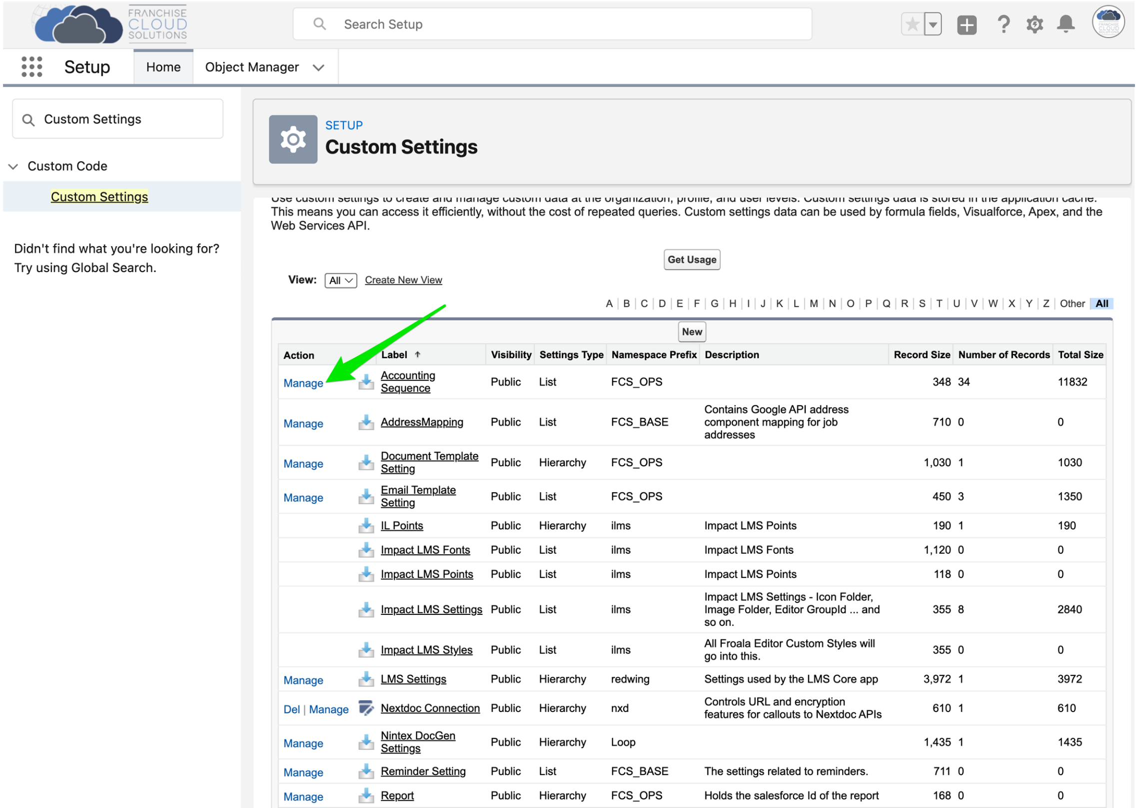
1. From the **Setup** menu select **Setup**.



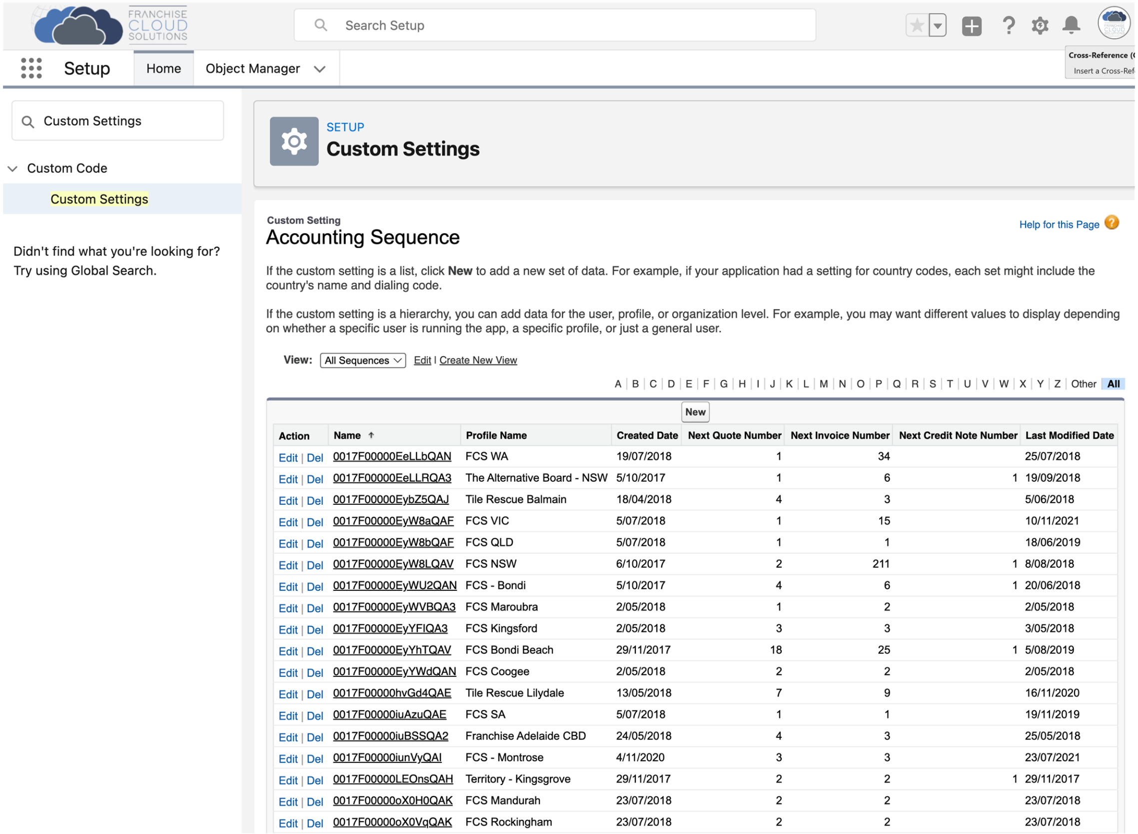
2. Within **Quick Find** search for `Custom Settings`, then select the **Custom Settings** item.



3. In the **Custom Settings** list, locate the **Accounting Sequence** label and select its**Manage** link.



4. You have found the list of accounting sequences.

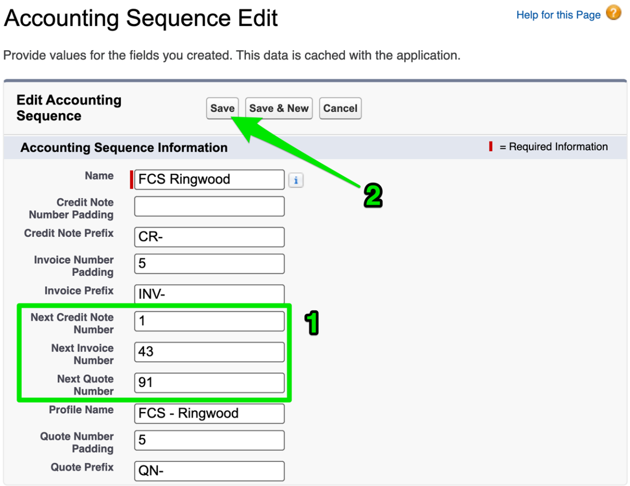


> If you can only see the sequence Name and not the Profile Name, you will want to press the **Create New View** link, name the view and then add `Profile Name` to **Selected Fields**.

5. Using the `Profile Name`, identify the franchise's accounting sequence. To edit the account sequence, press the **Edit** link.

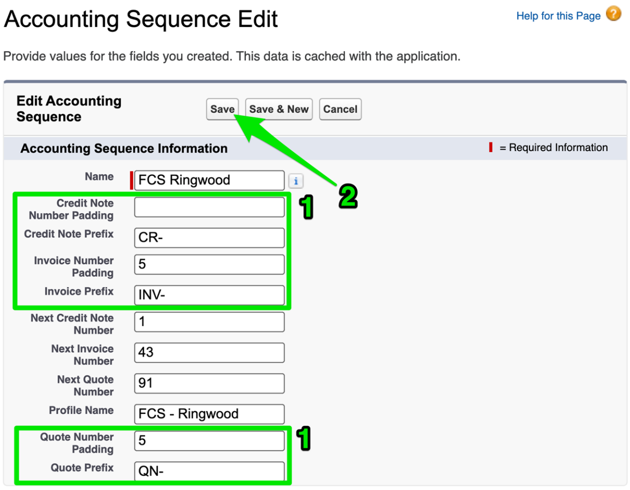
To set a starting number for a quote, invoice or credit note sequence

» Edit the quote, invoice or credit note next numbers, then press **Save**.



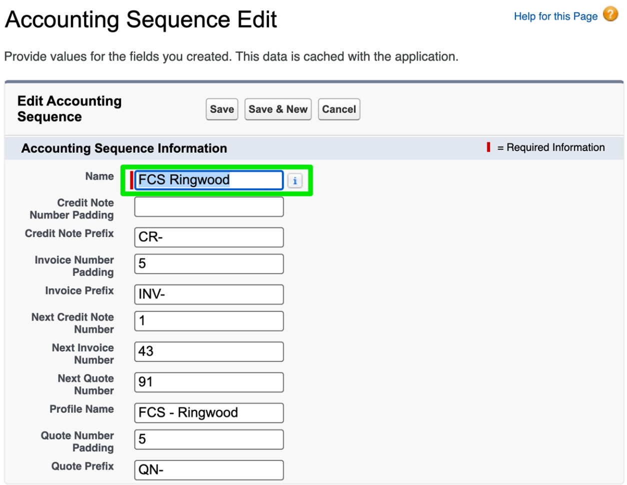
To format a quote, invoice or credit note sequence

» Edit the quote, invoice or credit note prefix and padding fields, then press **Save**.

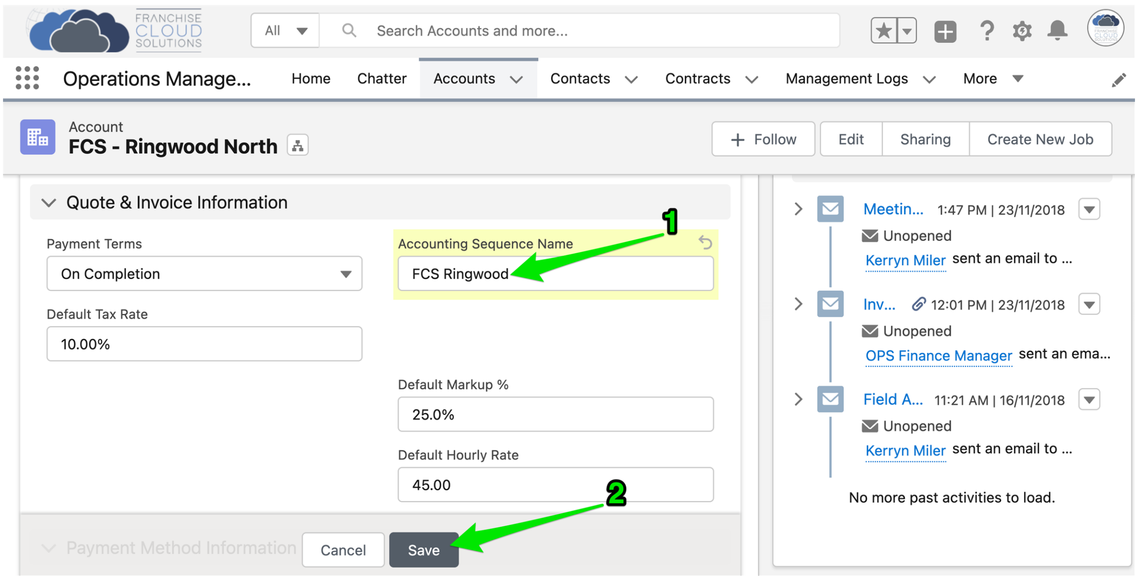


To share an accounting sequence between multiple franchise profile accounts

1. From the accounting sequence, copy the unique accounting sequence **Name**.



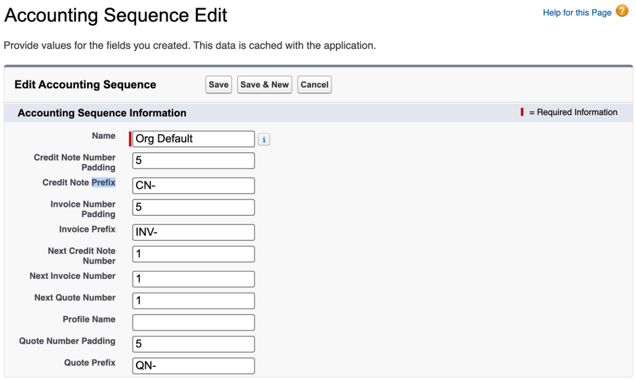
2. Now paste that unique code into the `Accounting Sequence Name` **field of each additional Franchise Profile Account** that needs to use the accounting sequence, then press **Save**.



> 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**.



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.

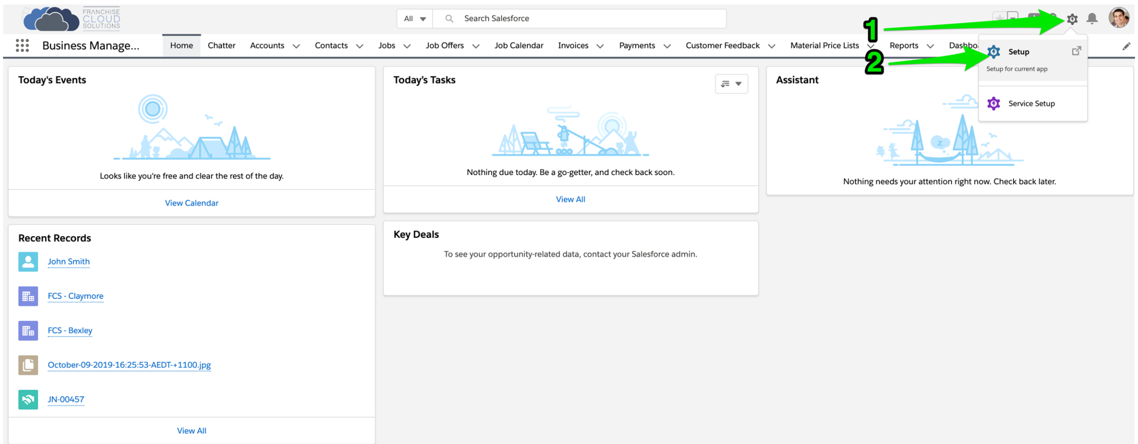
How to upgrade Franchise OPS

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:

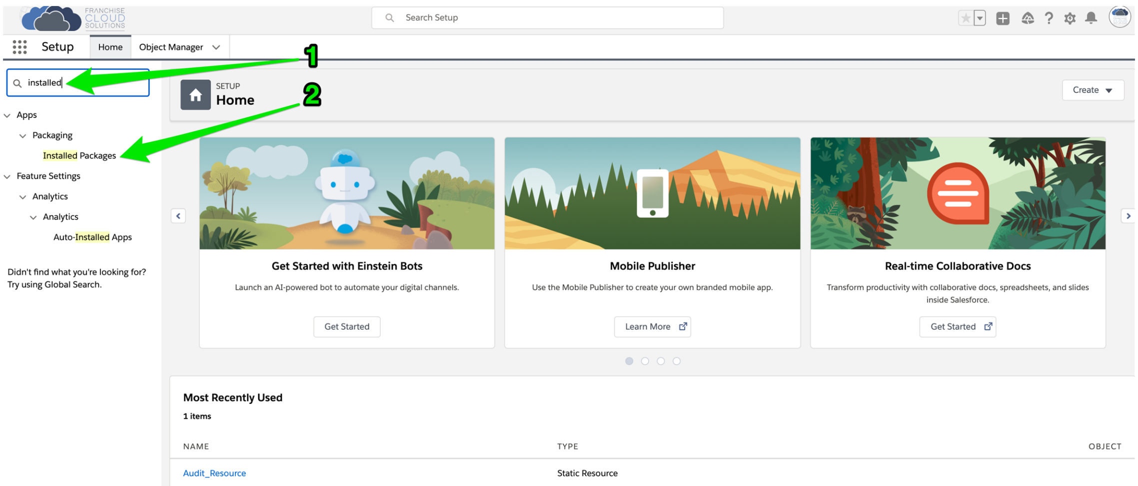
- FranchiseBase
- Recruitment
- FranchiseOps
- SMS

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

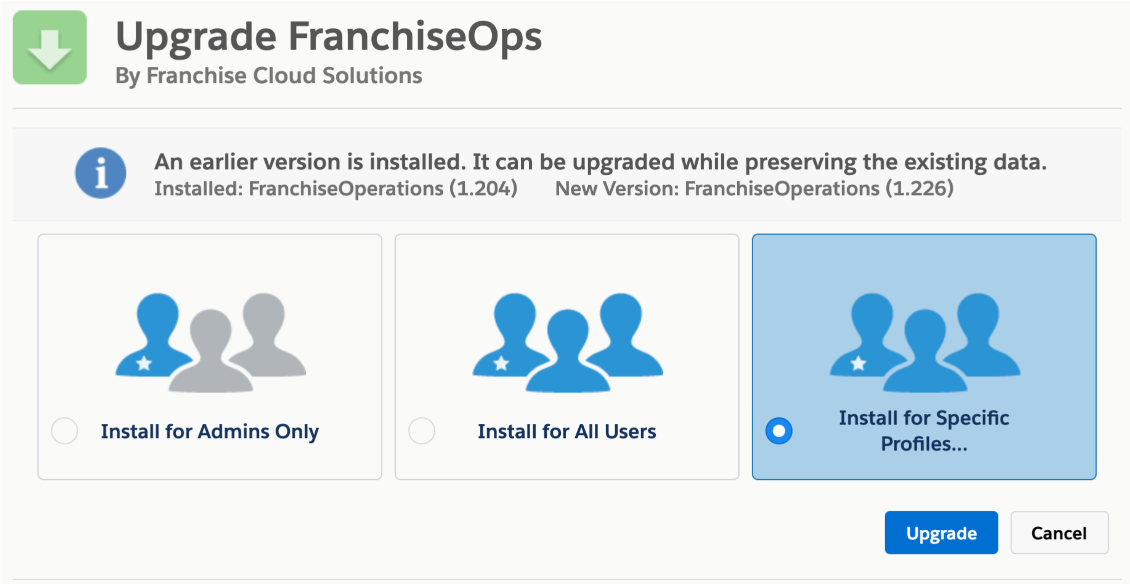
> You will need to be given a package link. If you have a package link and are a system administrator, you may be able to upgrade an earlier package to a more recent package. Note that some versions of **Recruitment** or **FranchiseOps** require an updated version of **FranchiseBase**.

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.

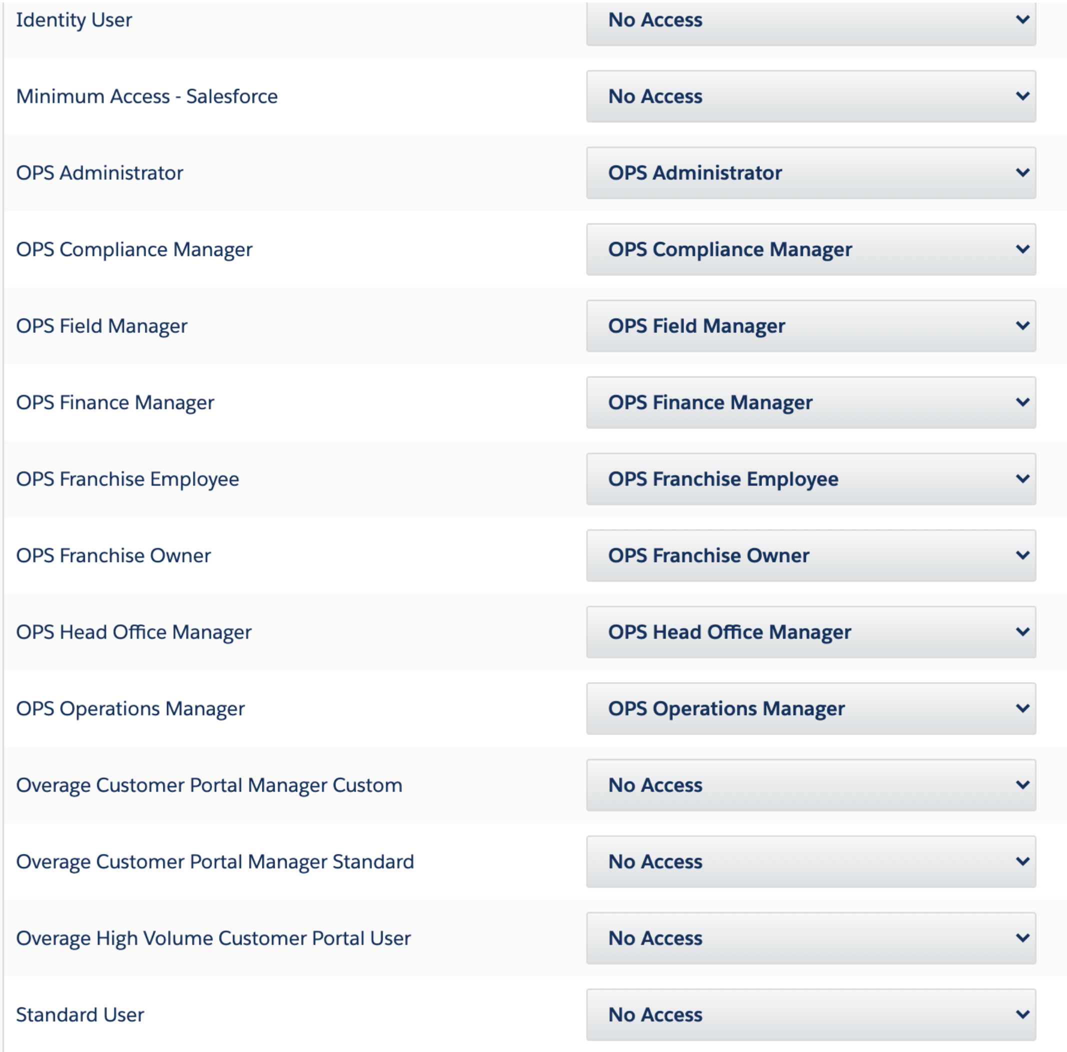
> **Prepare the URL for an upgrade**
>
> When you first log into Salesforce, note your organization's URL. It will be something like this:
>
> https://nfctrial01-dev-ed.lightning.force.com/lightning/page/home
>
> From this, you will want to isolate just the Base URL:
>
> https://nfctrial01-dev-ed.lightning.force.com
>
> 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://nfctrial01-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**.



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

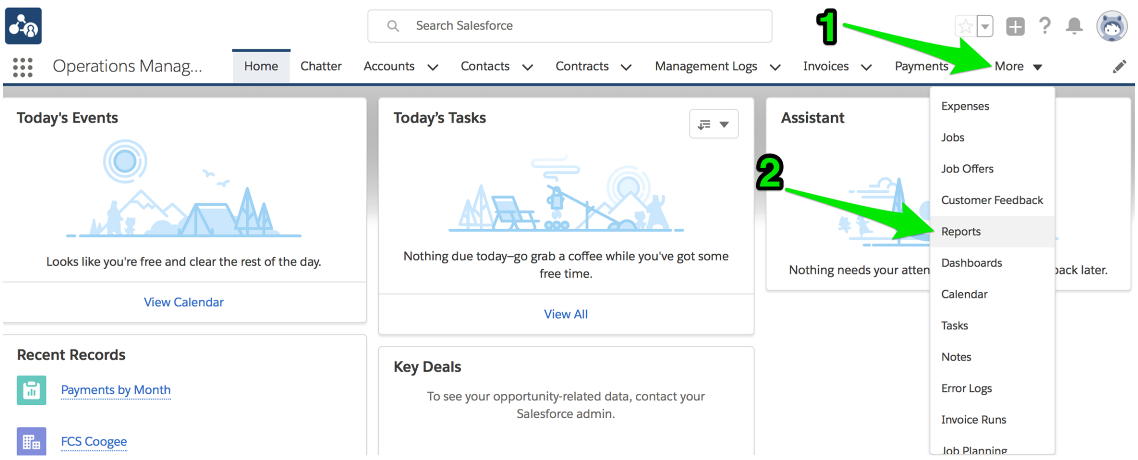
Understanding reports

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.

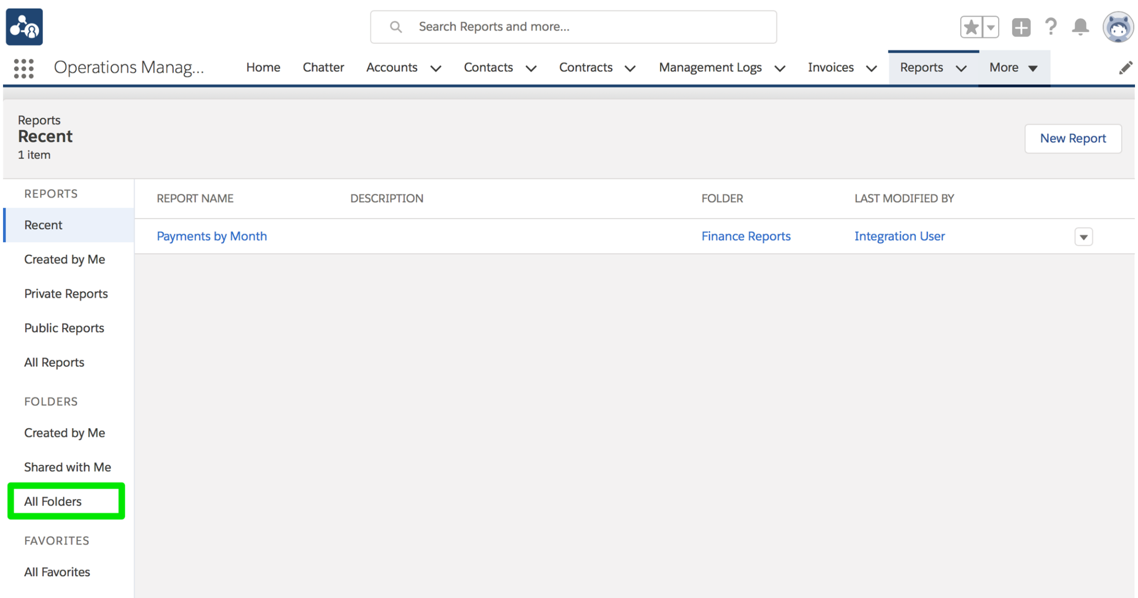
To discover available reports

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



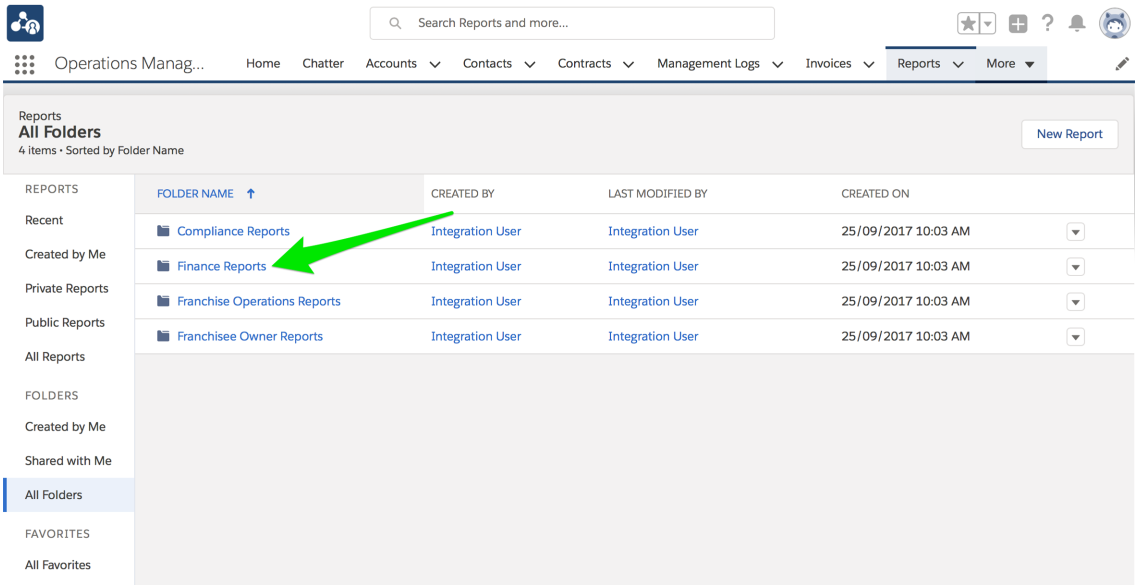
The recent reports folder appears. If you have yet to use a report, this will be blank.

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

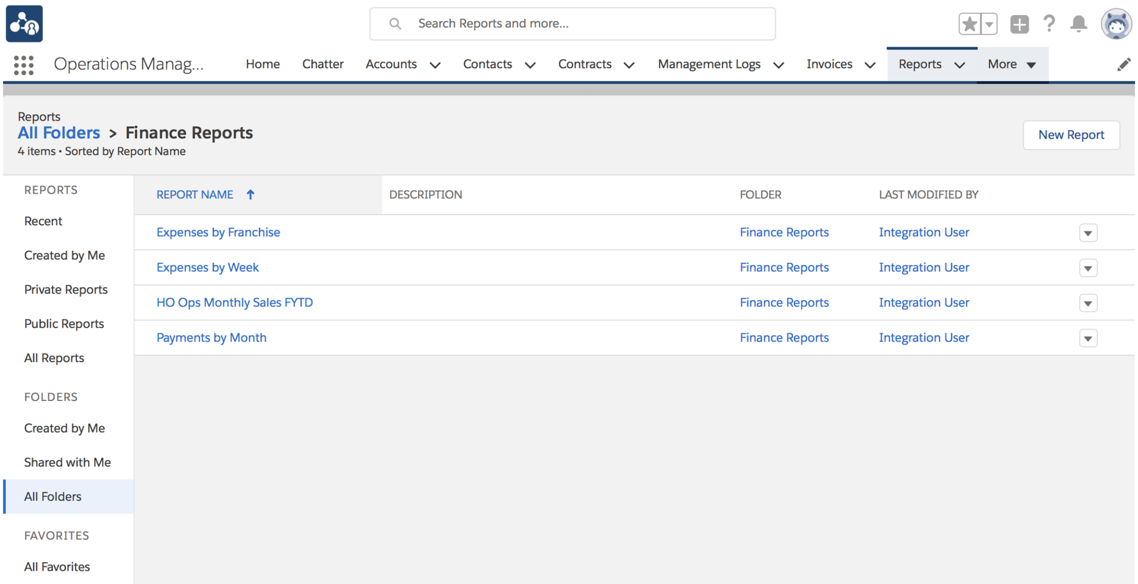


There you will see each of the different categories of report that come with Operations Management.

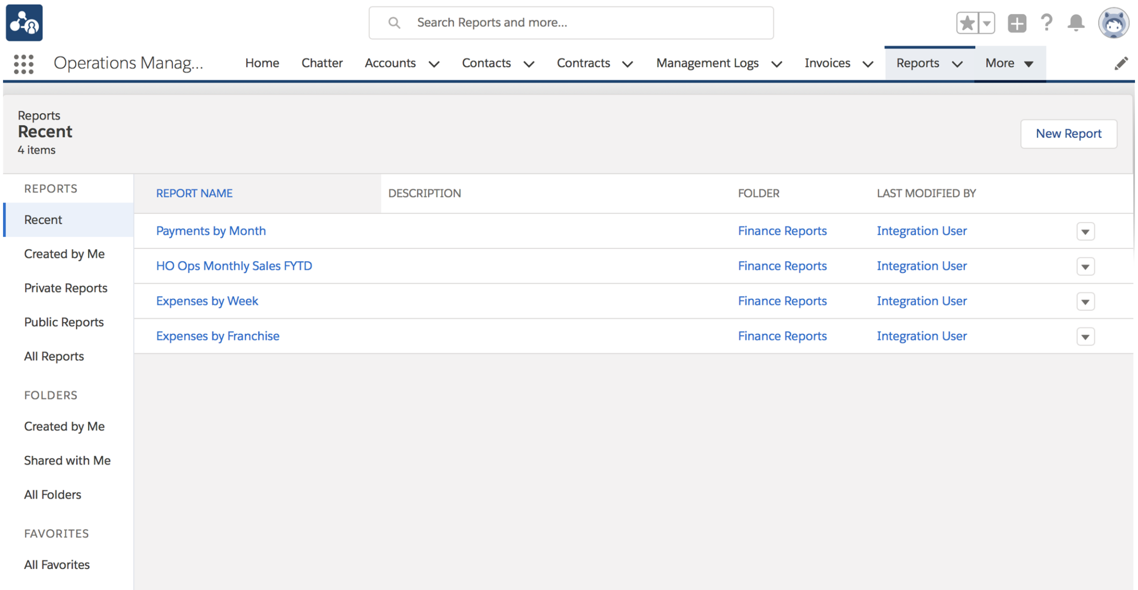
3. Select any one of the report folders.



Now you can see the reports within that folder.



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



Standard reports

While you can always create your own reports, the reports that ship with 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 `Deactivation in Progress`, 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 `Status` is `Signed`.
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 *Converted* and *Unconverted* `Status`.
Job Requests in and out	Number of Job Offers by month in *Owned* and *Unowned* `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 *Converted* vs. those that are *Unconverted*.

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.

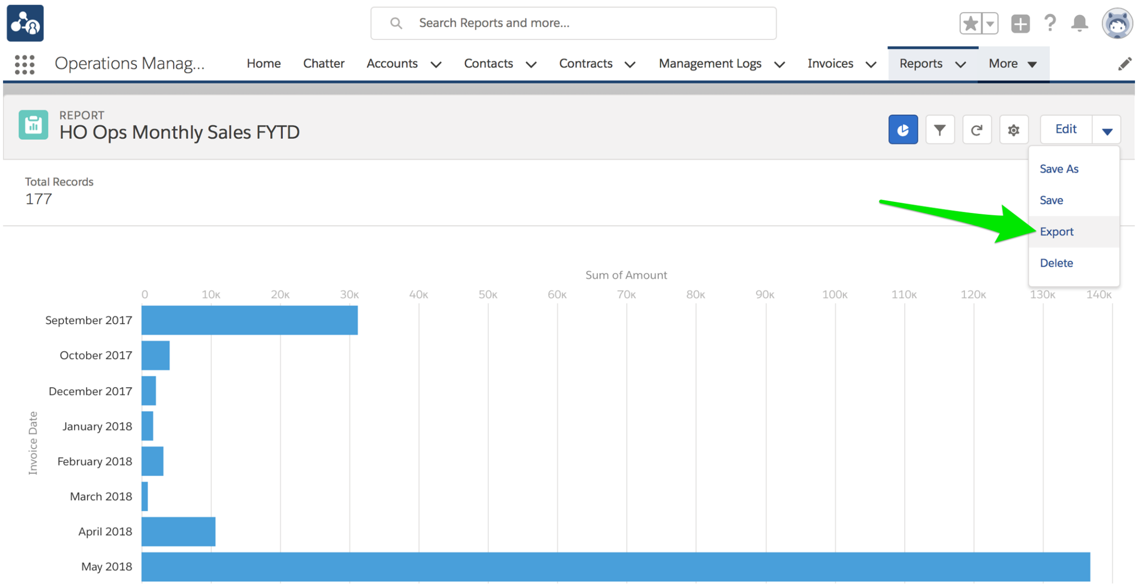
Report Name	Description
Envelopes by Sender this Month	Total envelopes sent this month by sender.
Envelopes by Sender this Quarter	Total envelopes sent this quarter by sender.
Envelopes by Sender YTD	Total envelopes sent this year to date by sender.
In Progress Envel-opes	Envelopes sent and not voided,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

How to export a report

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

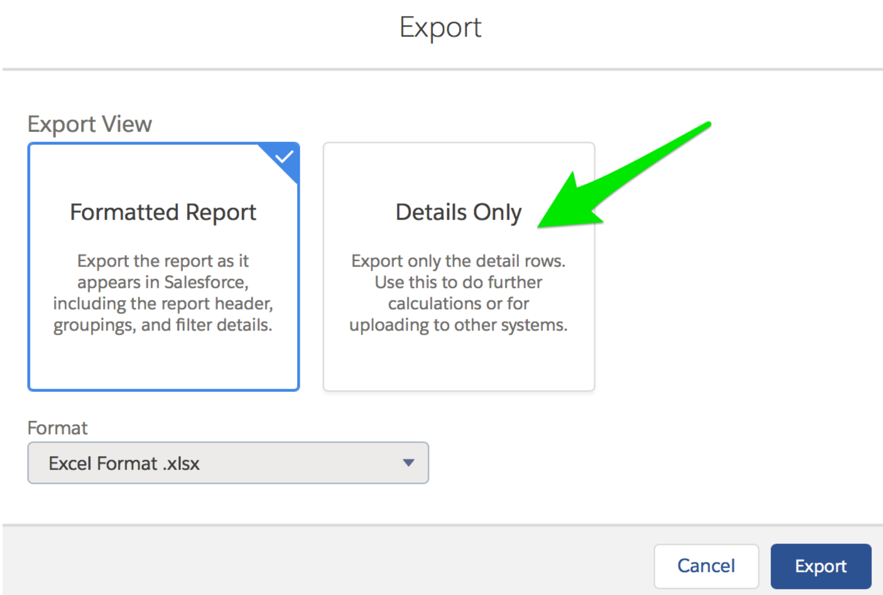
To export report results

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



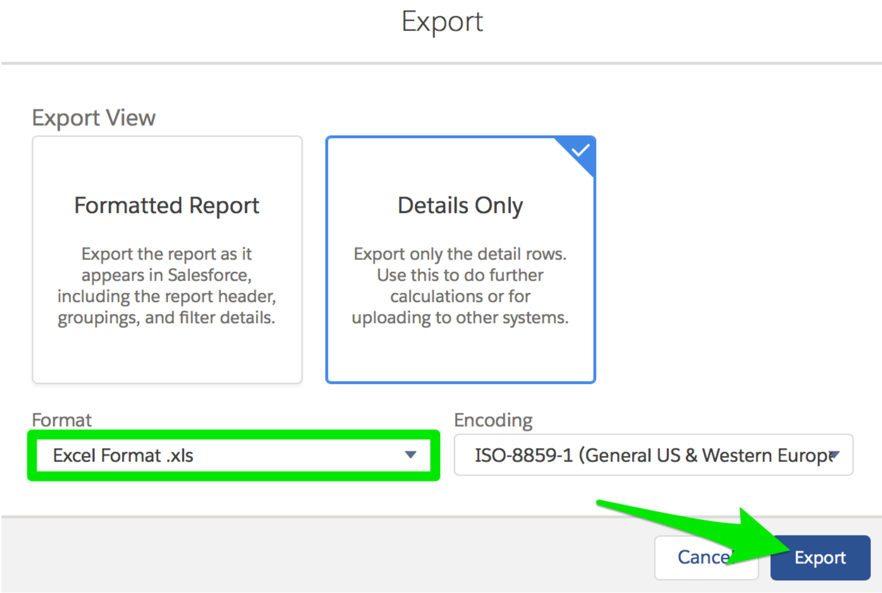
   The Export dialog box appears.

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



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

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



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

How to print a report

To print a report

1. Export the report. *See* “How to export a report” on page 265.
2. Print it using Excel.

CHAPTER 15

Accessing Help and Support

Product Documentation

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

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

Knowledge Base

Franchise Cloud Solutions maintains a Knowledge Base covering

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

Customers can access the Knowledge Base at any time.

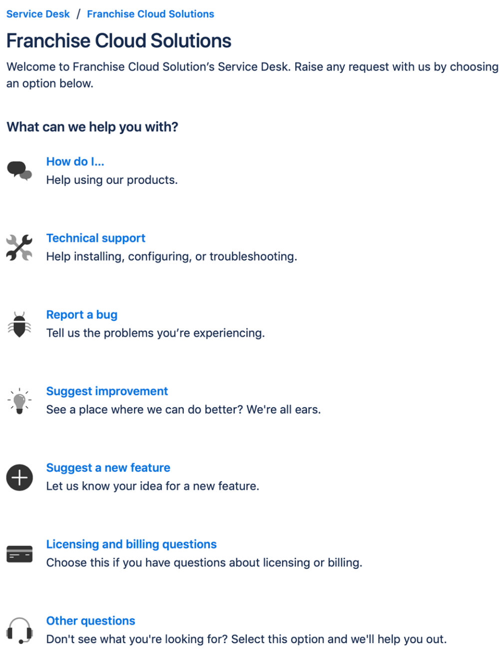
Contacting Customer Support

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

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

Raising Service Requests

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



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

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

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

How to Suggest Improvements or Features

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

We would like to know:

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

> Most people only tell us #3.
>
> **We're always more able to help you if you give us all three pieces of information.**

How to Report a Bug

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

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

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

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

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

What is a useful bug report?

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

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

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

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

Here are some tips on writing a good bug report.

How to write a good bug report

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

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

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

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

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

Example Bug Report (minimal)

Summary

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

Description

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

To replicate:

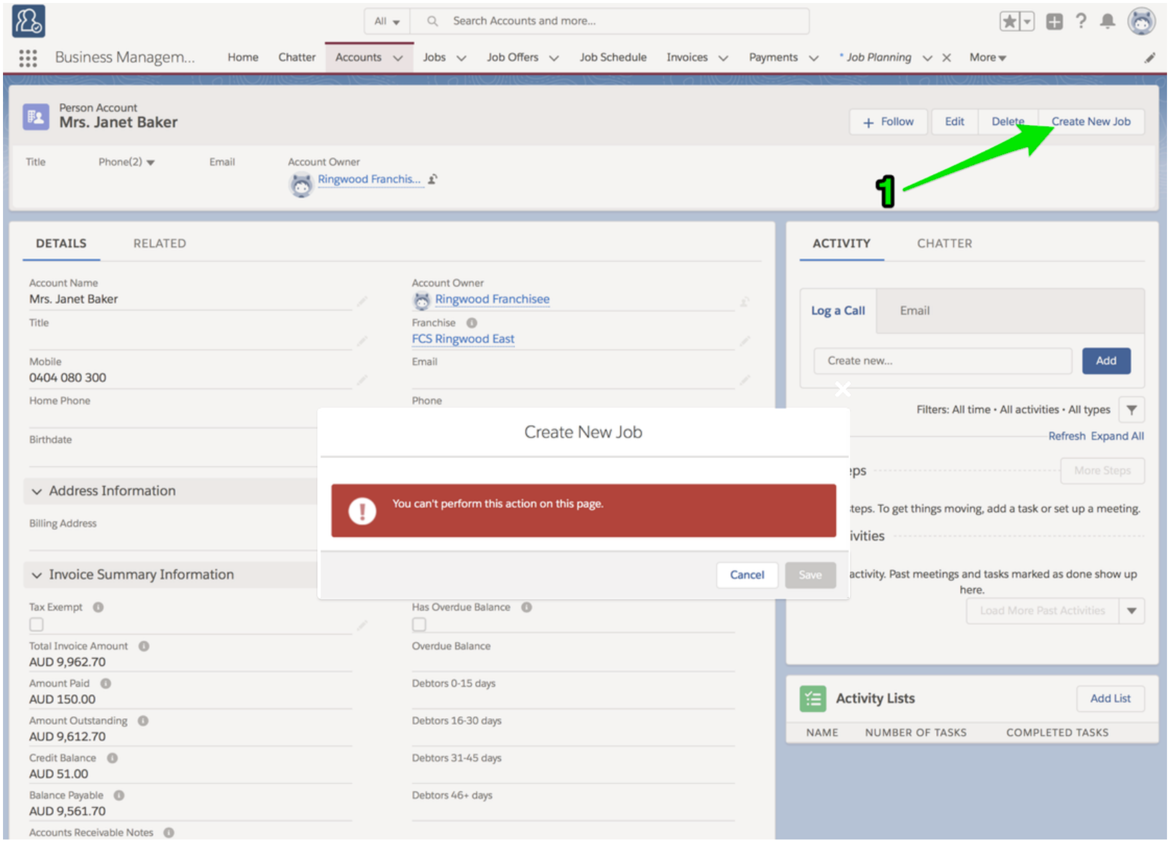
1. Log into Business Management as a franchisee.

2. Go to the Accounts tab and select an account.

3. Click the Create New Job button.

EXPECT: A new job to be created.

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



Environment

Sandbox.

Google Chrome.

Desktop (Windows 10).

Example Bug Report (technical details)

Summary

Accounts with Financial Integration throw component error on page load

Description

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

Component error throws in both Chrome and Safari.

I'm logged into Golden UAT as system administrator.

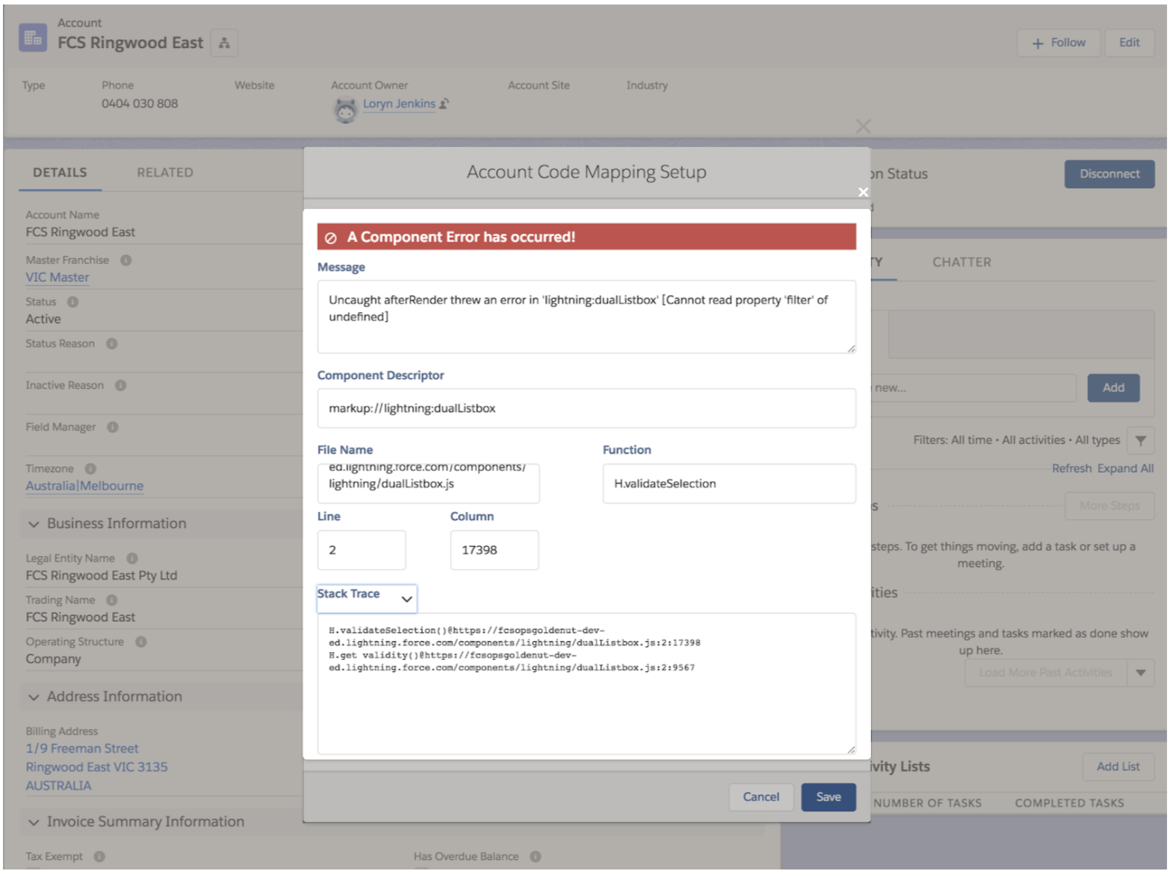
To replicate

1. Go to the Accounts screen.

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

EXPECT: FCS Ringwood East account displays.

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



Error details

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

`Message`

`markup://lightning:dualListbox`

`Component Descriptor`

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

`Function`

`H.validateSelection`

`Stack Trace`

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

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

Environment

Production

Google Chrome OR Safari (BUT NOT Firefox).

MacOS 10.13.

Example Bug Report (medium complexity replication)

Headline

Events on job calendar are clickable only once per instantiation.

Description

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

To replicate:

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

EXPECT: Event dialog to re-appear.

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

Further:

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

EXPECT 1: Event dialog to re-appear.

EXPECT 2: Event object unclickable.

ACTUAL: Event object is not clickable.

Environment

Safari & Chrome

Mac OS 10.12

Business Impact

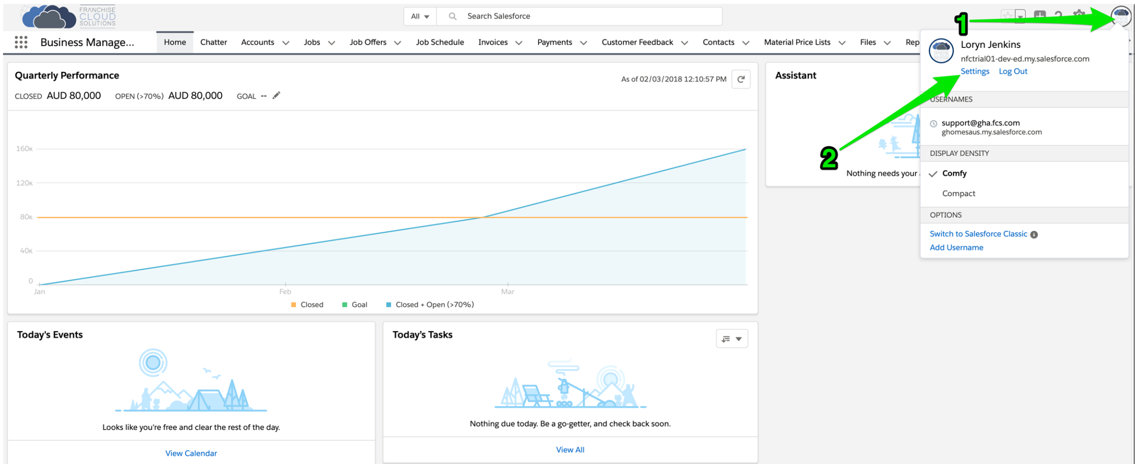
- Who affected: All franchisees, Users of Job Calendar.
- Visibility: 40 times per month per franchisee.
- Block: None.

Granting Account Login Access

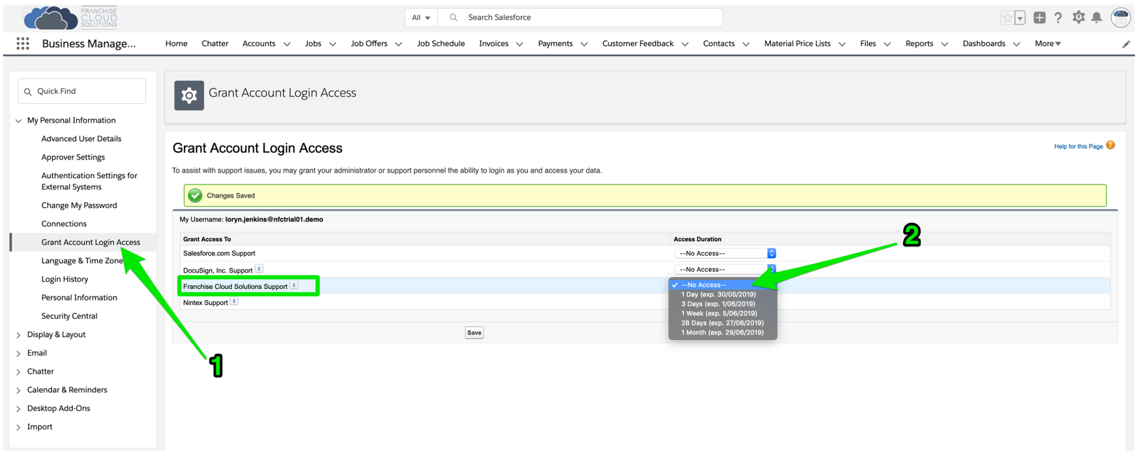
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

To provide our customer support team access to your system

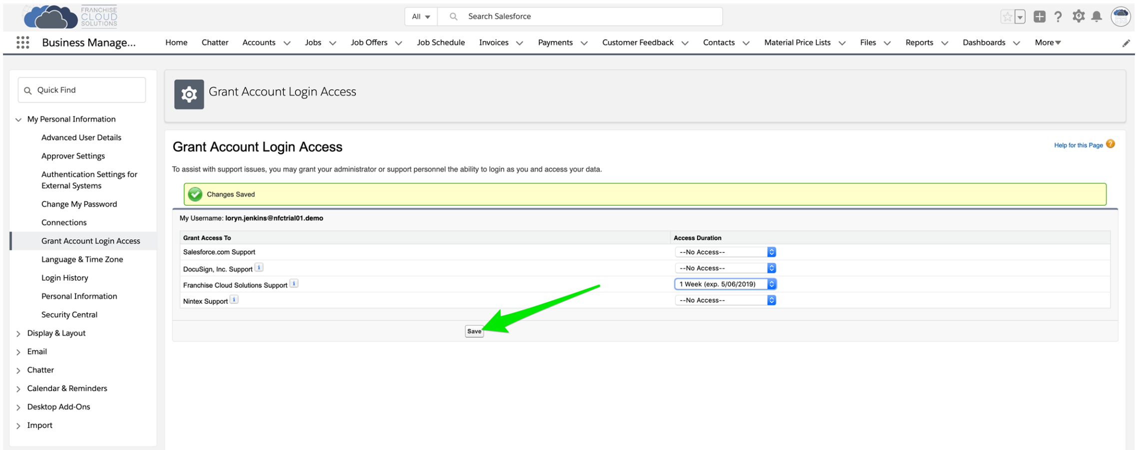
1. Select your account **Settings**.



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



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



> You can revoke access at any time.