Operations Management
User Guide

version 1.26

FranchiseOps version 1.198-1.306

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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 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

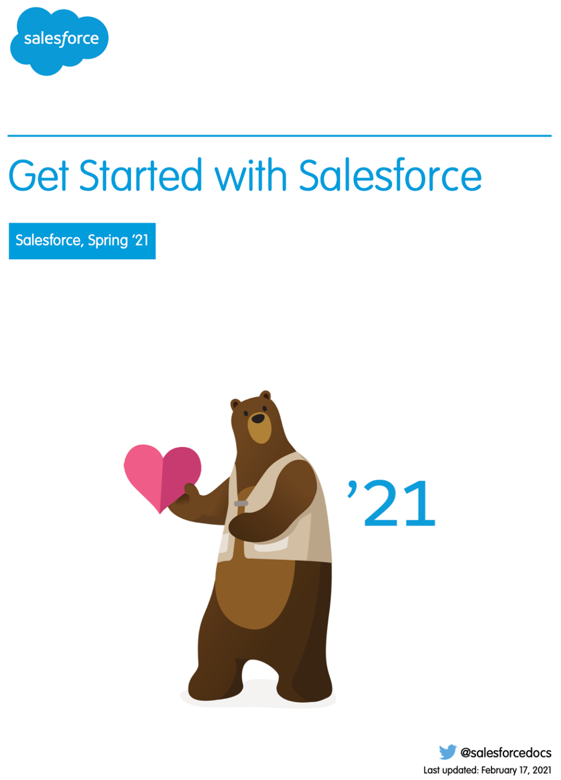
- increase administrative efficiency
- reduce errors and omissions
- comply with tax codes
- manage on-going relationships with your franchisees

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.

Where to start

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

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



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

Where to start

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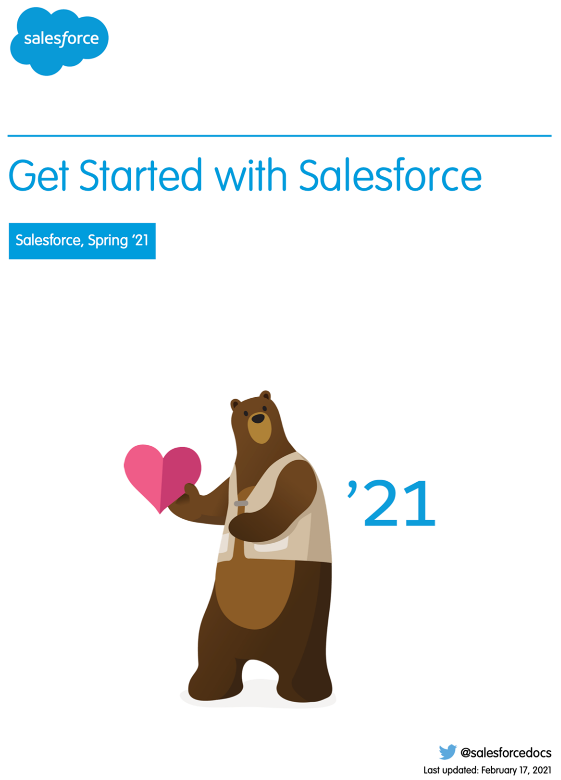

salesforce

Get Started with Salesforce

Salesforce, Spring '21

'21

@salesforcedocs

Last updated: February 17, 2021

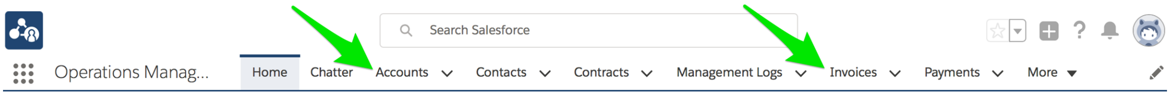
> For more Salesforce user guides, See Salesforce Downloadable User Guides.

How Salesforce organizes information

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

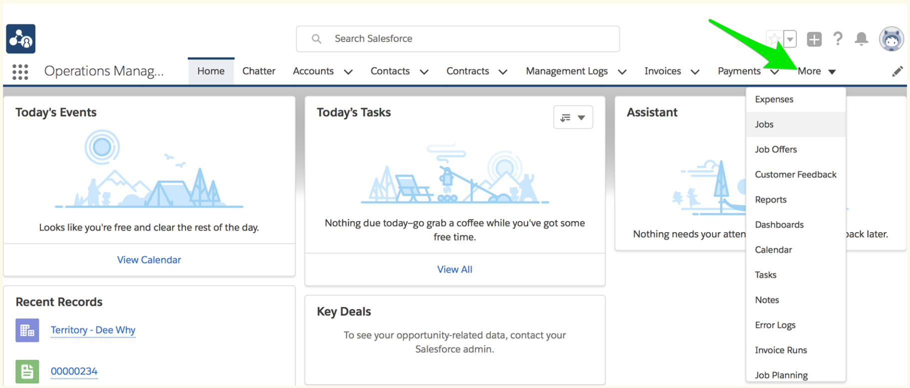
All accounts are stored in the list of **Accounts**. All Invoices are stored in the list of **Invoices**, etc.

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



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

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



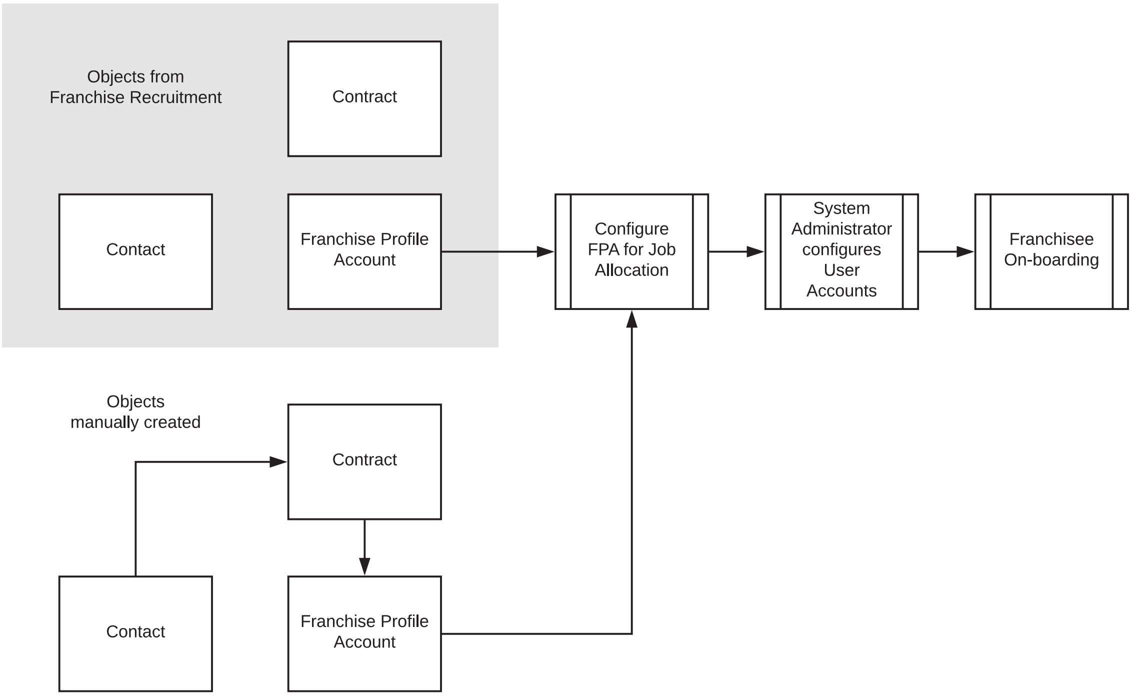
Overview

Operations Management allows you to setup and manage a network of franchise businesses. Operations Management has four areas of focus

- Franchise setup
- Job allocation exception handling
- Franchise operations review & improvement
- End of contract

Franchise setup

When your organization has licensed Franchise Recruitment, the core franchise records are transferred into Operations Management when the sale closes. When you are operating with Operations Management alone, you will need to obtain the franchise contract and manually enter the details into Operations Management.



Once the core franchise records are in place, the Franchise Profile Account must be configured for job allocation. When that is complete, the system administrator can then configure a user account for the franchisee and additional user accounts for the franchise's employees. The system is then ready for the franchisee and employees to be on-boarded and trained.

Job allocation exception handling

There is an on-going need for operational overview of the Job allocation process in order to handle exceptions. Someone must be responsible for handling

- unallocated jobs
- duplicate jobs
- aged jobs

Franchise operations review & improvement

Operations Management provides facilities for operational review and improvement of franchise operations. Firstly, Operations Management provides Management Logs, which allows the franchisor to document reviews, audits, actions and decisions to be captured into a log. Secondly, Operations Management contains capacity to capture customer feedback through a random sampling of completed jobs. Both these facilities provide information to franchisees on how they can operate their businesses more effectively.

End of contract

Operations Management also provides support for managing franchisee transitions when the contract term expires. It provides the ability to continue the franchise agreement with further terms, to put in place a new contract, to cease trading and hand the territory back to the master franchisor, or to sell the territory to another franchisee.

How to login to Salesforce

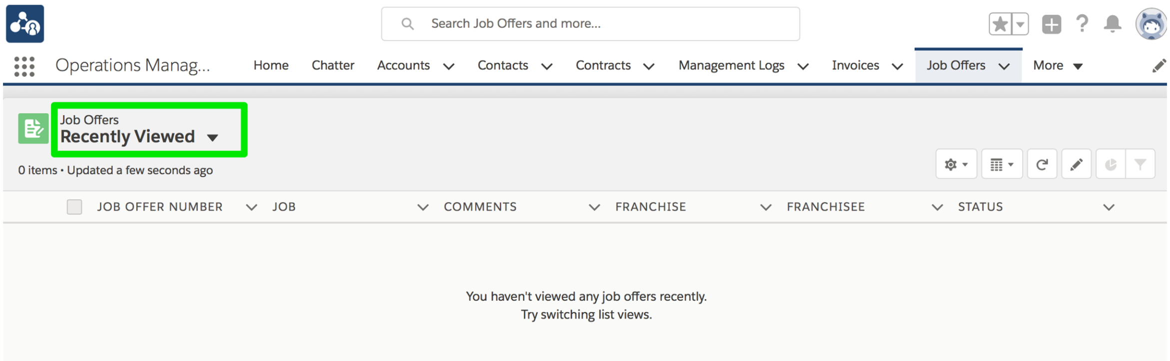
For assistance with logging into Salesforce, see the Get Started with Salesforce online help.

How to browse information using List Views

When you open a Salesforce menu, you are unlikely to see all the information that Salesforce is storing. The system might be quite unwieldy if it did show you all its information. To help prevent information overload, what it does is show a subset of the information by use of what Salesforce calls a “List View”.

Each List View shows a certain subset of information. Each Salesforce menu already has multiple List Views, and you can create your own.

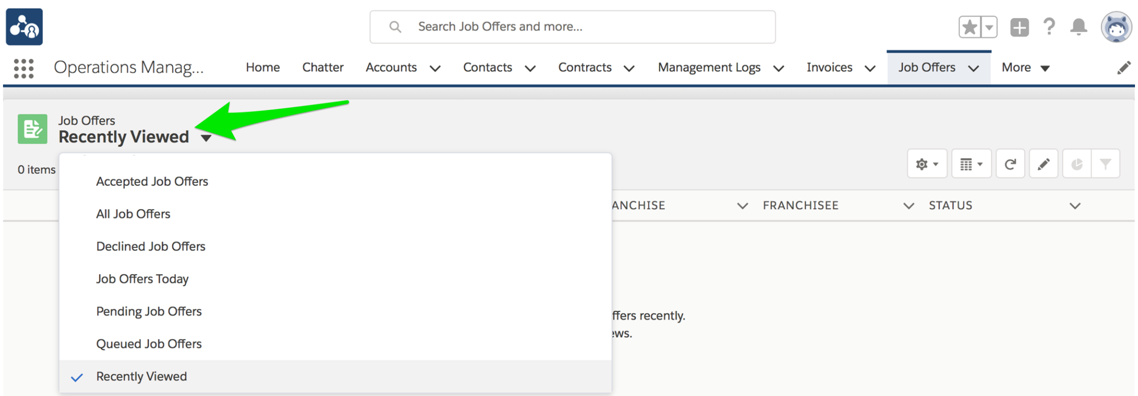
When you first open a menu, the first List View you see is likely to show you an empty list. Salesforce is showing you things you have viewed recently. This is known as the **Recently Viewed** List View.



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

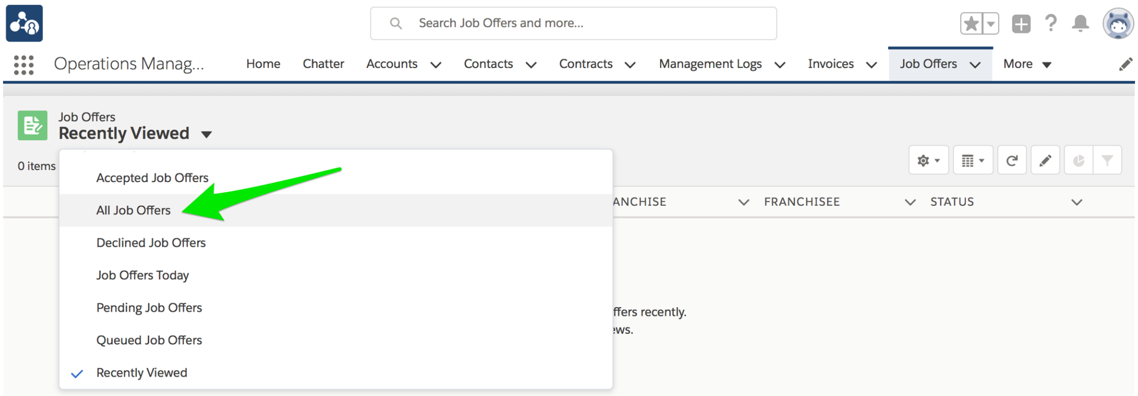
To see some data

1. Click on **Recently Viewed**.



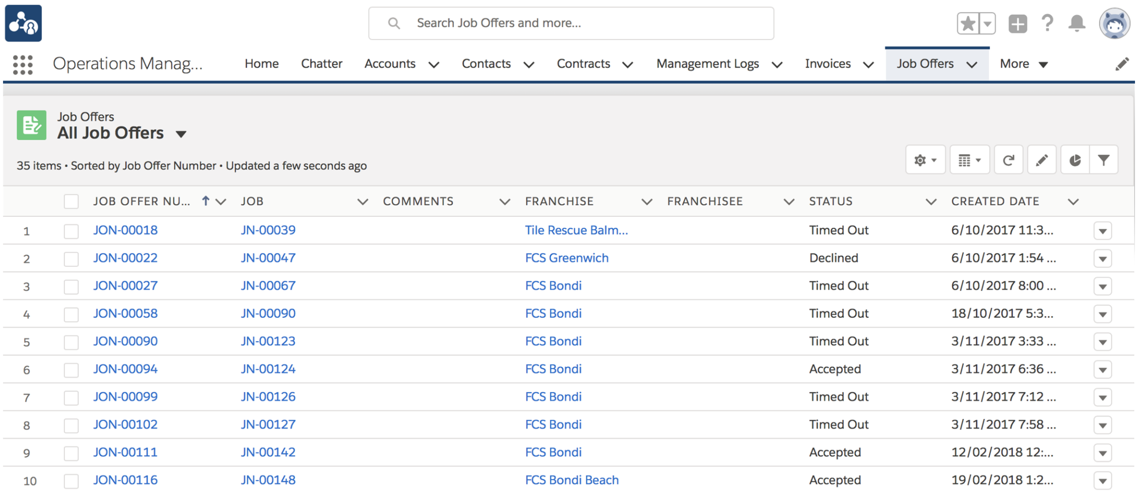
“Recently Viewed” is the name of a list that shows items you have viewed recently. Now that you have clicked on it, you can see the names of other lists.

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



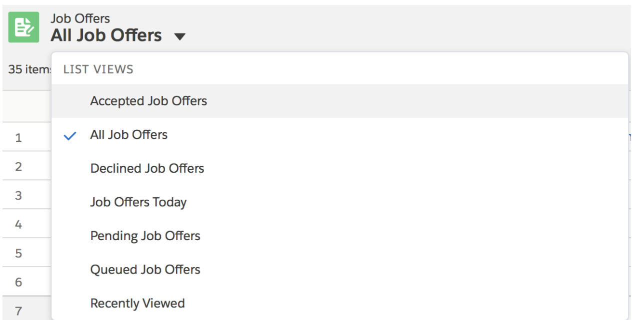
If there is data in your system, this list is likely to show it.

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



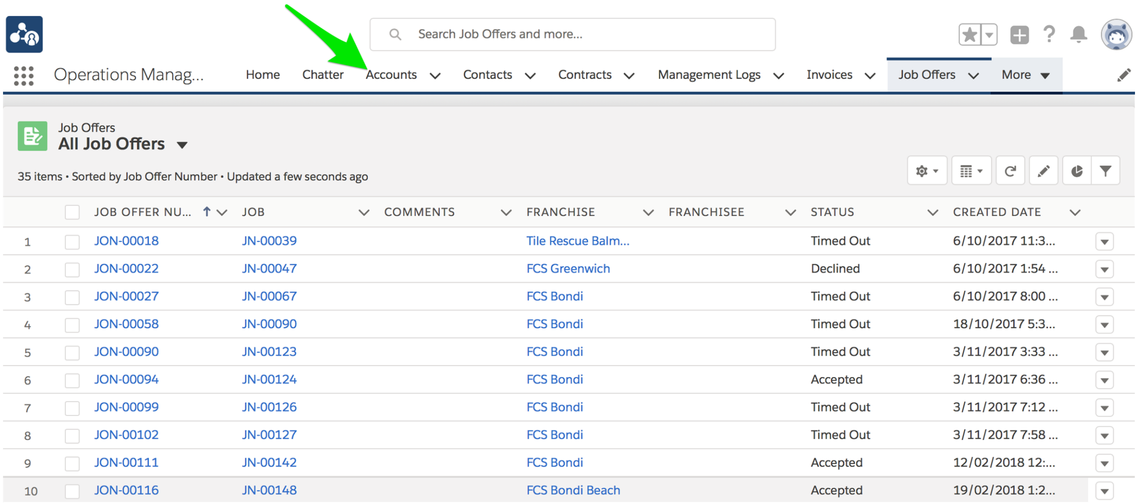
	JOB OFFER NU...	JOB	COMMENTS	FRANCHISE	FRANCHISEE	STATUS	CREATED DATE
1	JON-00018	JN-00039		Tile Rescue Balm...		Timed Out	6/10/2017 11:3...
2	JON-00022	JN-00047		FCS Greenwich		Declined	6/10/2017 1:54 ...
3	JON-00027	JN-00067		FCS Bondi		Timed Out	6/10/2017 8:00 ...
4	JON-00058	JN-00090		FCS Bondi		Timed Out	18/10/2017 5:3...
5	JON-00090	JN-00123		FCS Bondi		Timed Out	3/11/2017 3:33 ...
6	JON-00094	JN-00124		FCS Bondi		Accepted	3/11/2017 6:36 ...
7	JON-00099	JN-00126		FCS Bondi		Timed Out	3/11/2017 7:12 ...
8	JON-00102	JN-00127		FCS Bondi		Timed Out	3/11/2017 7:58 ...
9	JON-00111	JN-00142		FCS Bondi		Accepted	12/02/2018 12:...
10	JON-00116	JN-00148		FCS Bondi Beach		Accepted	19/02/2018 1:2...

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



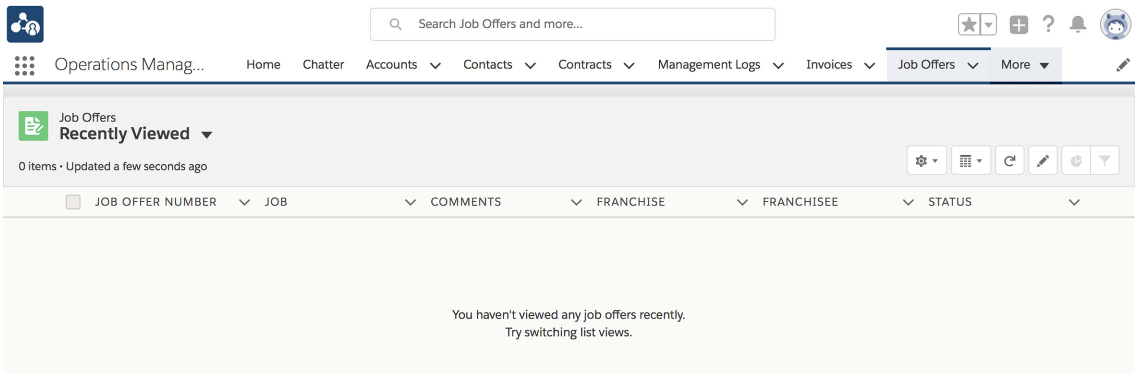
Each list potentially contains a different subset of records. Salesforce uses list views to make the amount of data you can see manageable.

5. Now click away to a different tab.



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

6. Now come back to the original tab.



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

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

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

Key list views

In addition to the standard Salesforce list views, Operations Management ships with its own range of useful list views. Familiarizing yourself with these list views will help you quickly become proficient in locating information. For most of the list views in the table, you will see data relating to your own business entity and records related to any business entity ultimately attached to yours (i.e. subsidiary master franchises or franchisees). A summary of the standard list views appears in the table below.

Record type	List Name	Description
Accounts	Business Accounts	The list of business customers.
	Individual Accounts	The list of potential franchisees (related to your business entity) and individual and household customers (owned by franchisees).
	Franchise Profile Accounts	The list of Franchise Profile Accounts. These are the entities operating the licensed franchise territories. Each Franchise Profile Account belongs to a Master Franchise Profile.
	Employment Candidate Accounts	Any accounts representing potential employees.
	Master Franchise Profile Accounts	The list of accounts representing Master Franchisor entities. Each Master Franchise Profile contains a list of Franchise Profile Accounts and Territories belonging to it.
Contacts	All Business Contacts	Records representing individuals that are attached to business customers of your franchisees.
	All Franchise Contacts	Records representing individuals that are attached to Franchise Profile Accounts. These typically represent franchisees, potential franchisees, their business associates and employees.

Record type	List Name	Description
Contracts	All Activated Contracts	Contracts that are activated.
	All Draft Contracts	Contracts that are draft.
	Expiring Contracts	Contracts that are expiring in the next seven months.
	Expiring Contracts, Notifications Pending	Contracts that are expiring in the next seven months who have been sent a notification.
Customer Feedback	Customer Feedback Queue	Customer feedback that has been received and not yet processed.
Invoices	Head Office Invoices - Not Sent	Generated invoices that have not yet been sent to franchisees.
	Head Office Invoices - Sent	Generated invoices that have been sent to franchisees.
Jobs	All Jobs	The list of all jobs in the system.
	All Jobs with Line Items	The list of all jobs that have been quoted or invoiced.
	Job Allocation Queue	If your implementation uses Job Allocation, jobs that cannot be automatically assigned to a franchisee are placed in the Job Allocation Queue. The name of this queue may vary depending on your implementation. Check with your system administrator to determine the name of your organization's Job Allocation Queue.

Record type	List Name	Description
Job Offers	Pending Job Offers	The list of jobs currently offered to you. You can accept, decline or ignore these job offers. Ignored job offers expire.
	Job Offers Today	The list of job offers offered today.
	Accepted Job Offers	The list of job offers that are accepted.
	Declined Job Offers	The list of job offers that were declined.
	All Job Offers	The complete list of job offers.

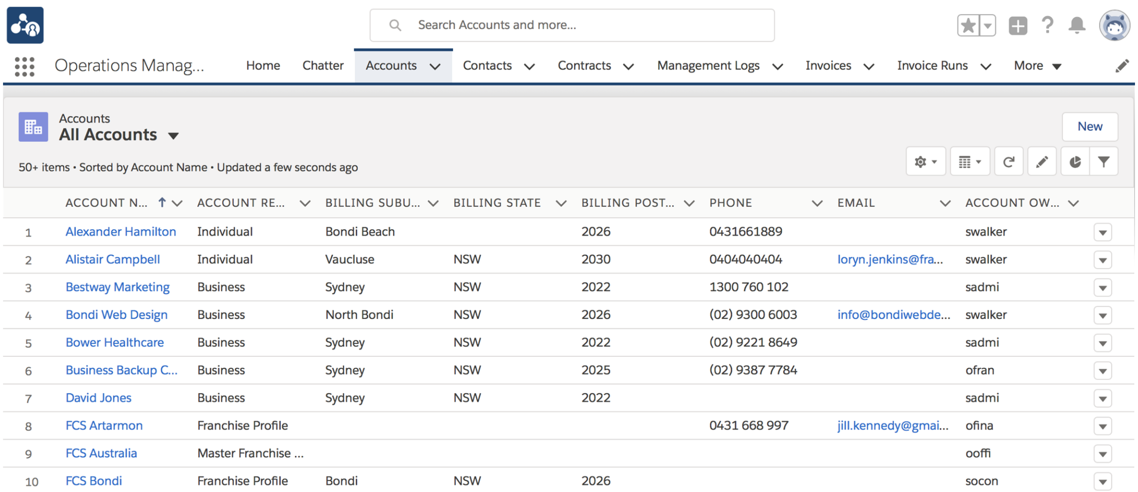
How to customize a list view

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

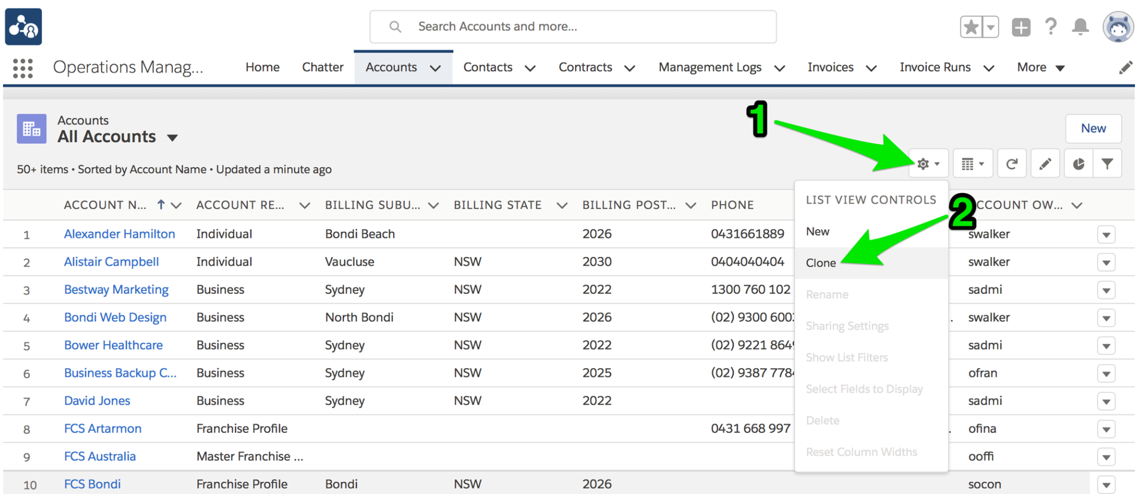
> Imagine you want to see the list of accounts that are belong to a specific territory. You could create a list view to show **Accounts for Territory**.

To modify an existing list view

1. Select the list view you want to copy.

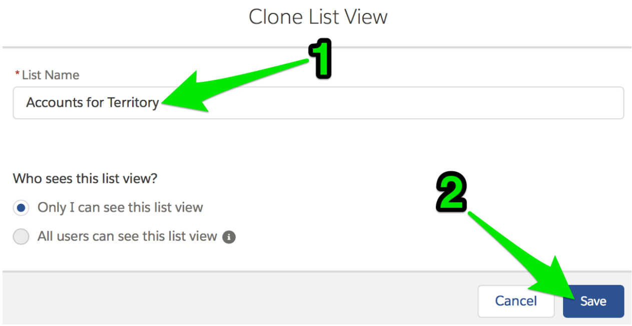


2. Open the **List View Control** and choose **Clone**.



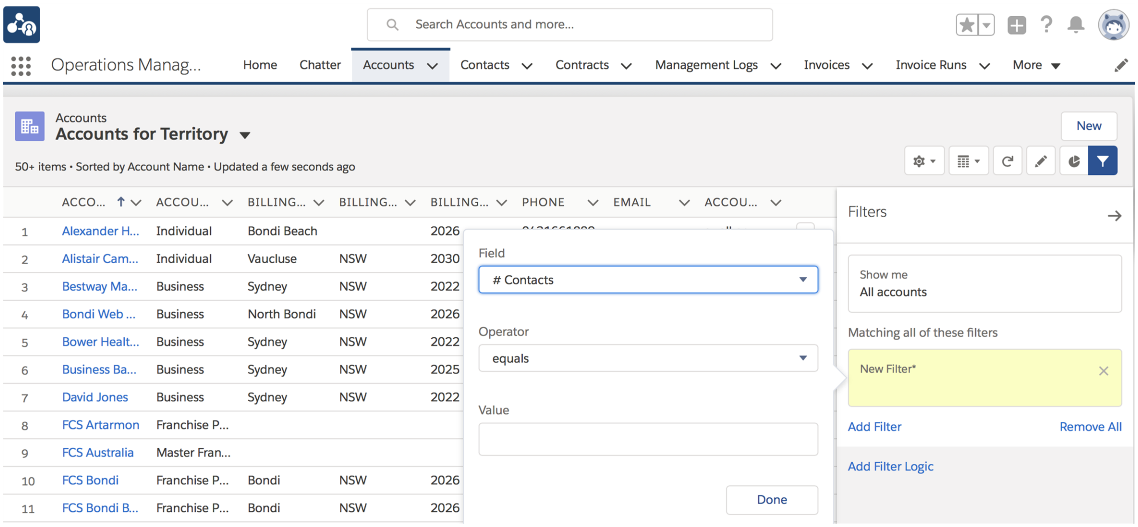
The **Clone List View** dialog box appears.

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

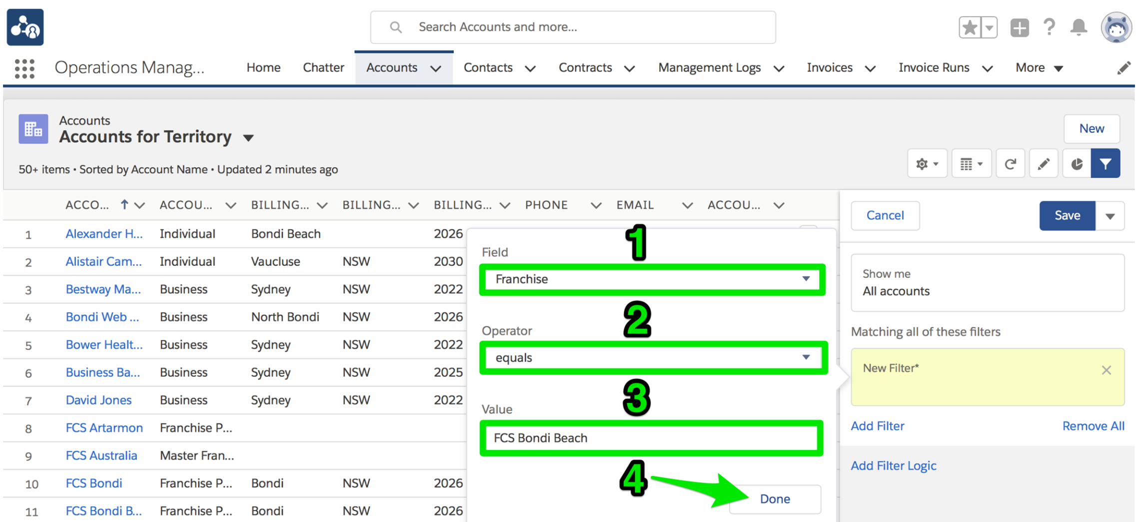


The newly named list view appears together with its filter pane.

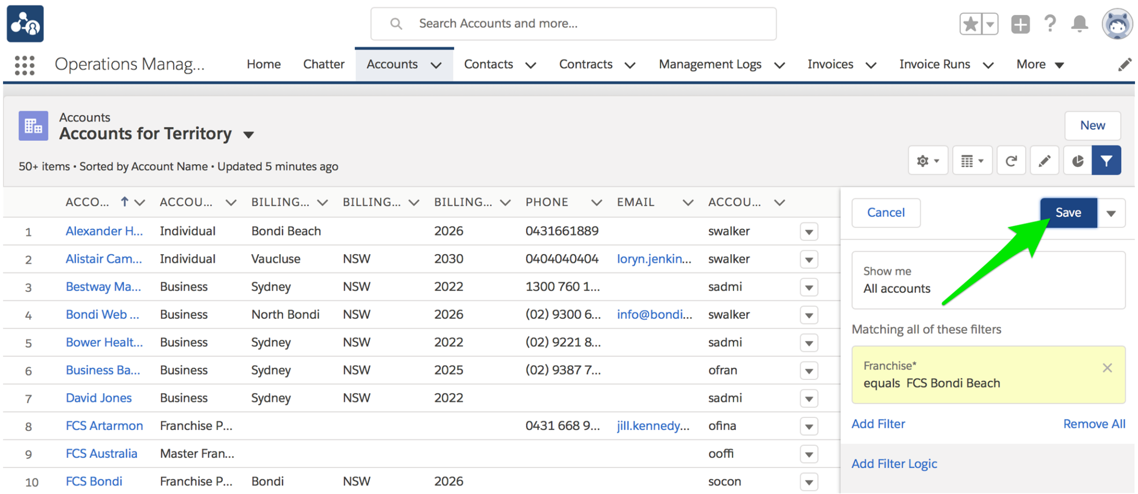
4. Choose the **Add Filter** link to add an extra filter condition.



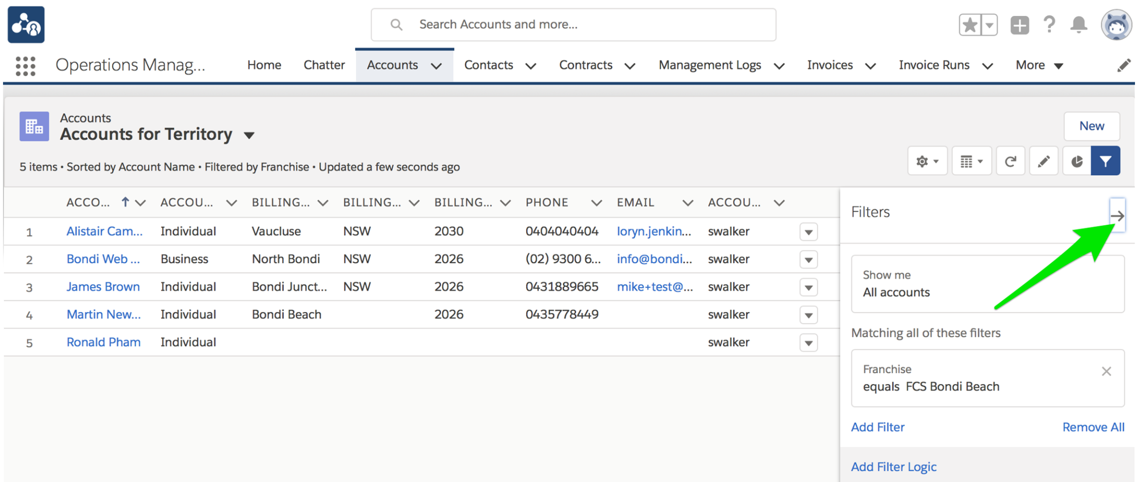
5. Use the `Field`, `Operator` and `Value` fields to set the new condition, then press **Done**.



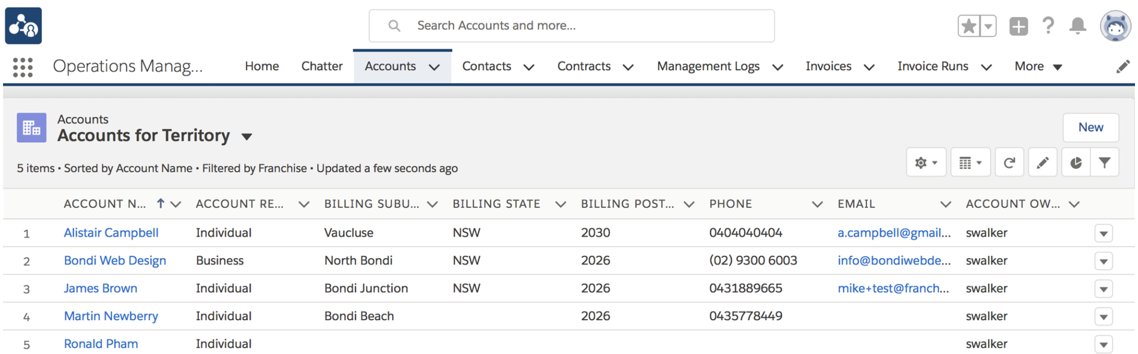
6. Now press **Save**.



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



Now you can see your newly modified list view.



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

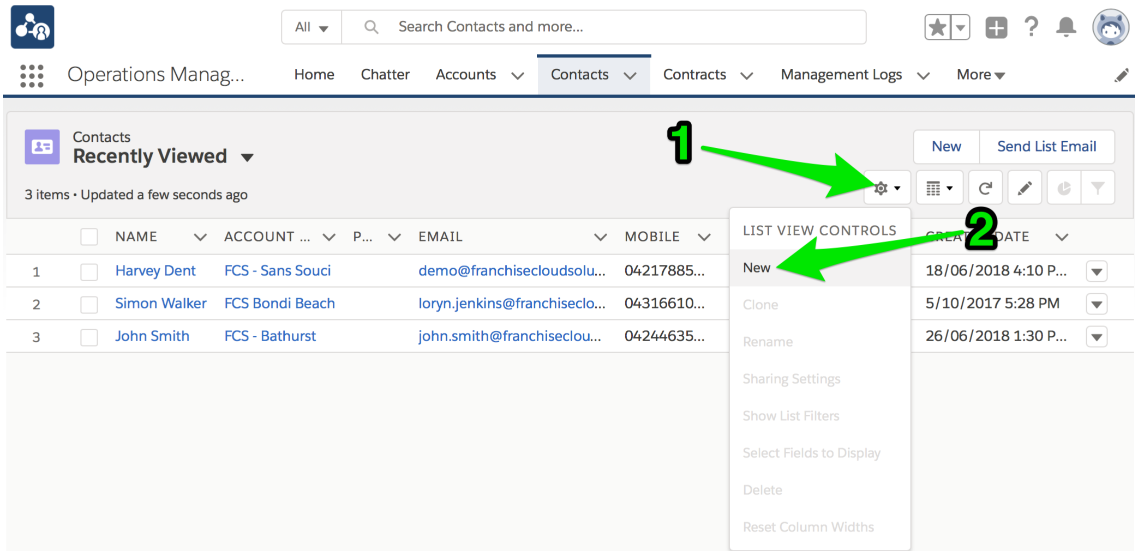
How to create your own list view

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

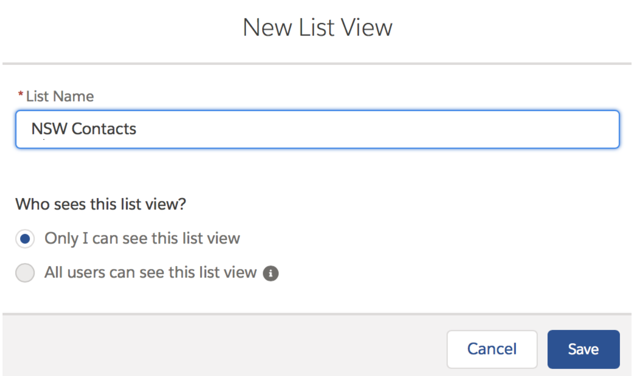
> In this example, we’re going to create a list view to show us contacts in our State or Territory.

To create a new list view

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

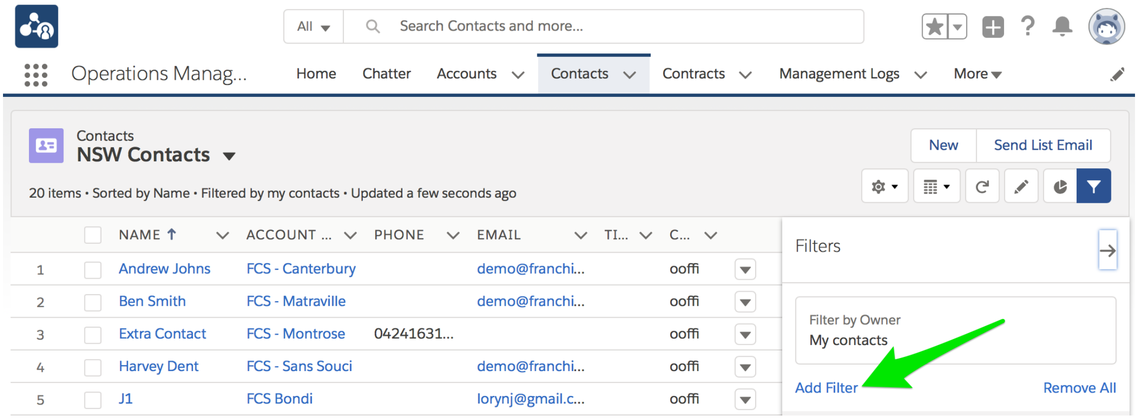


2. Enter the new `List Name` and press **Save**.

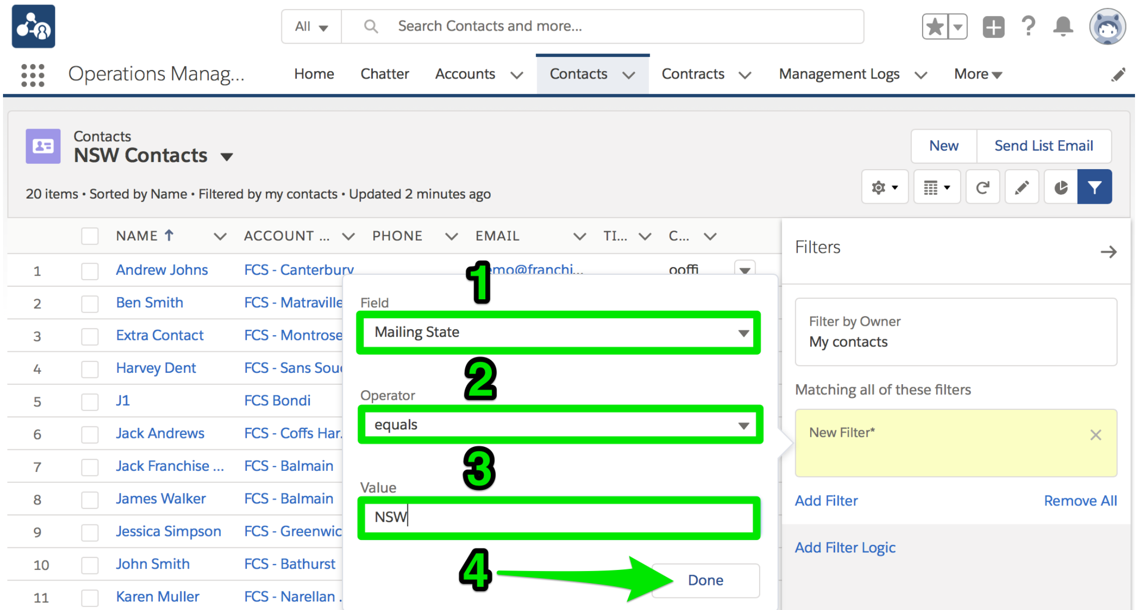


The newly named list view appears together with its filter pane.

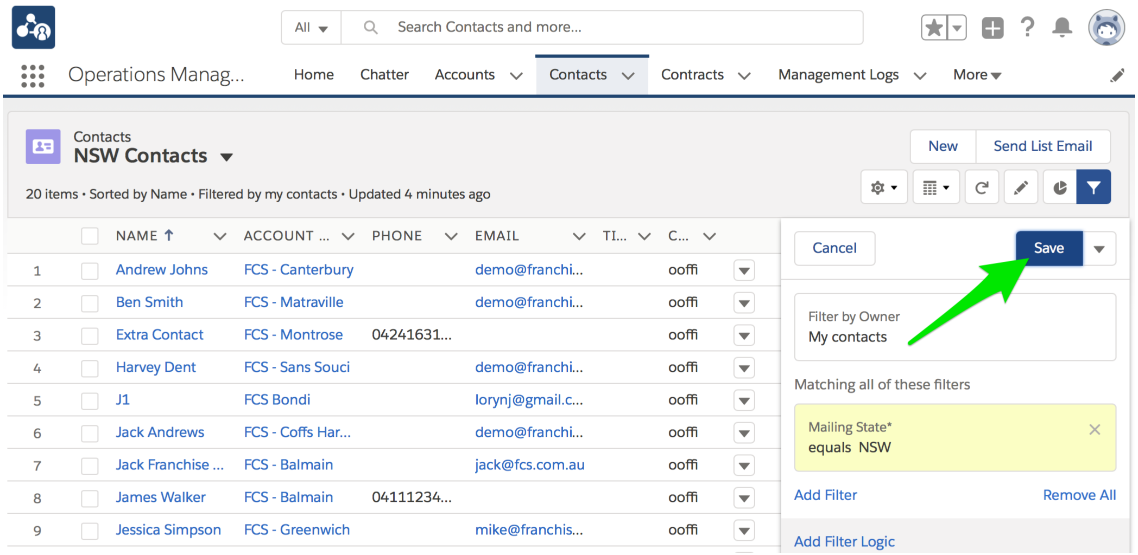
3. Choose the **Add Filter** link to add an extra filter condition.



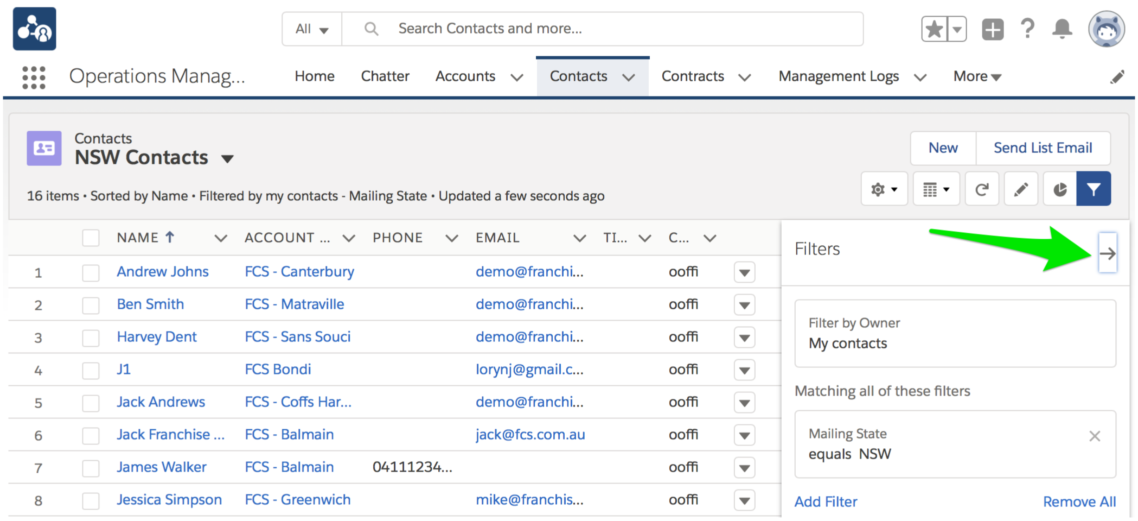
4. Use the `Field`, `Operator` and `Value` fields to set the new condition, then press **Done**.



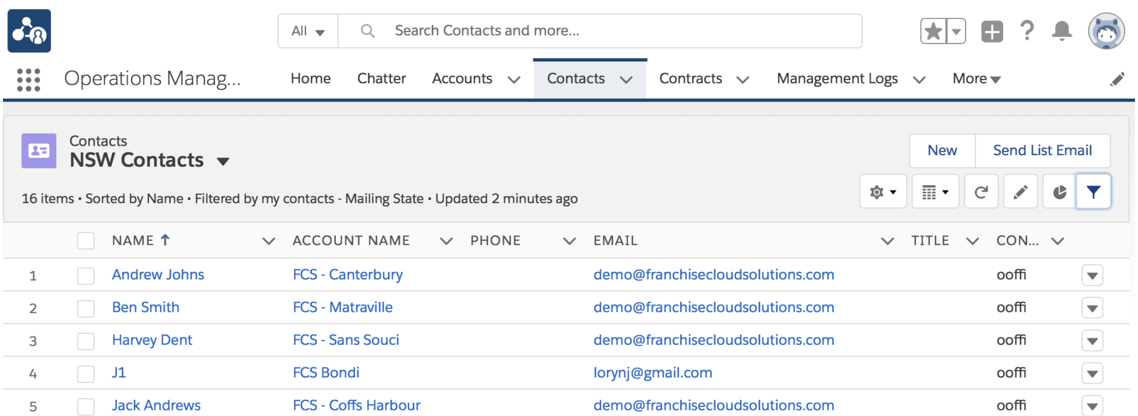
5. Press **Save**.



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



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

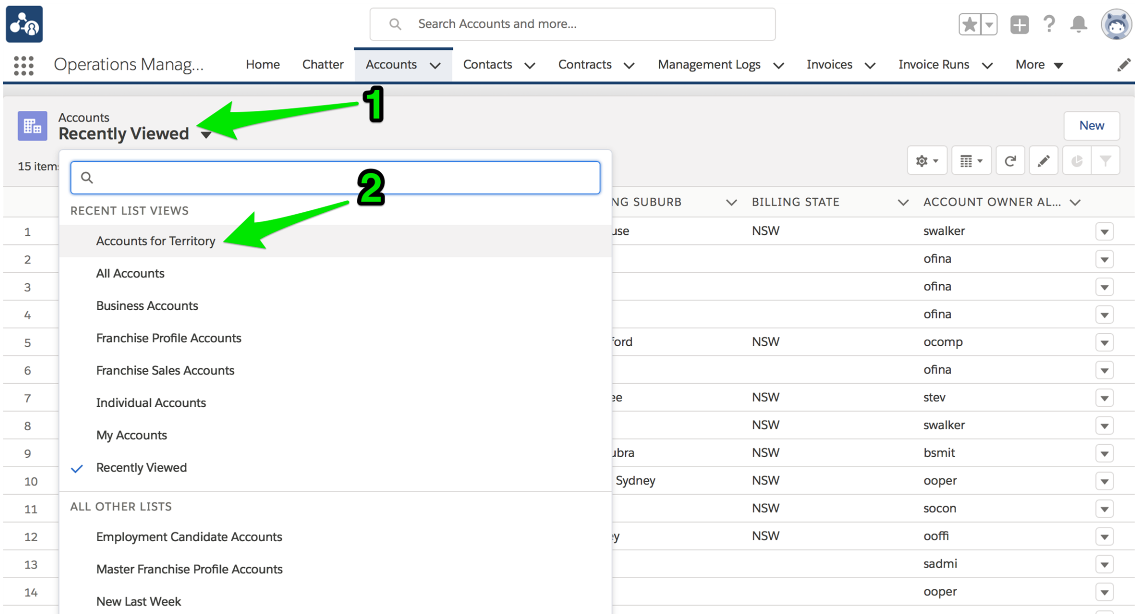


How to add columns to a list view

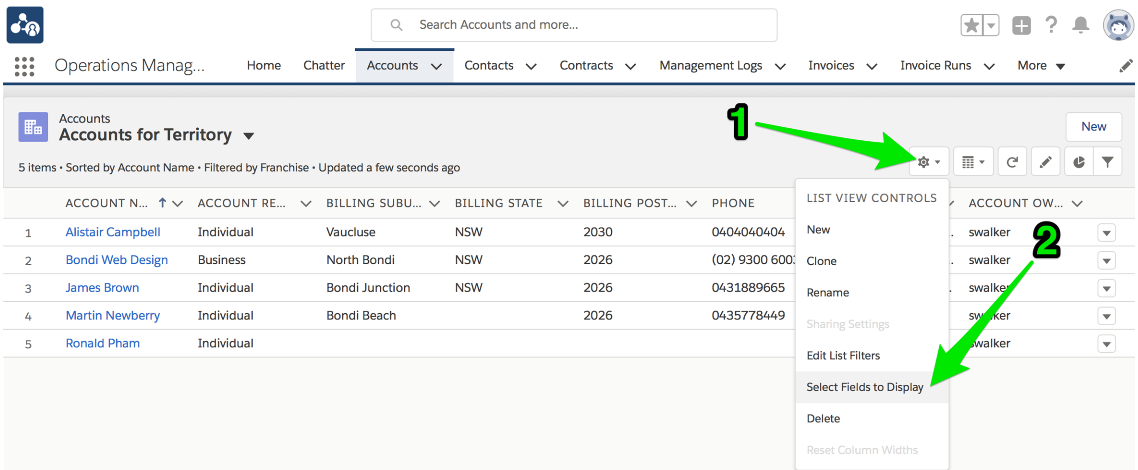
You can add columns to any custom list view.

To add columns to a custom list view

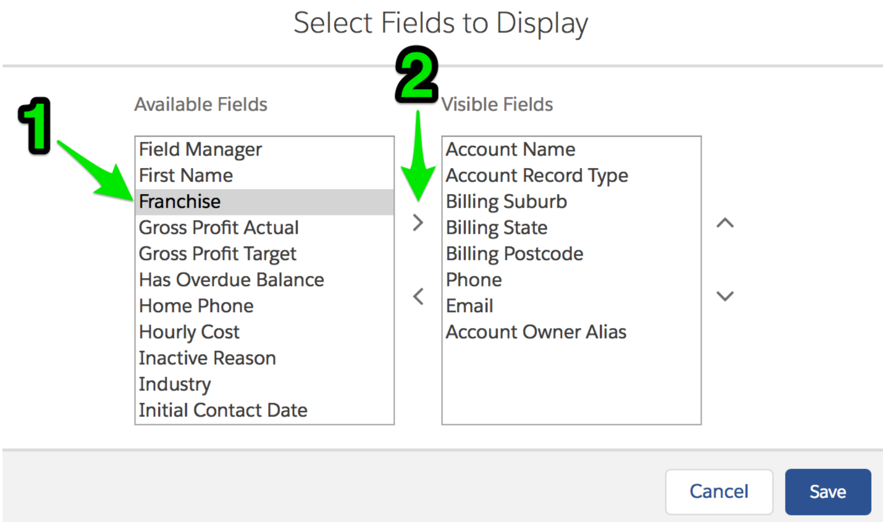
1. From **Recently Viewed**, select a custom list.



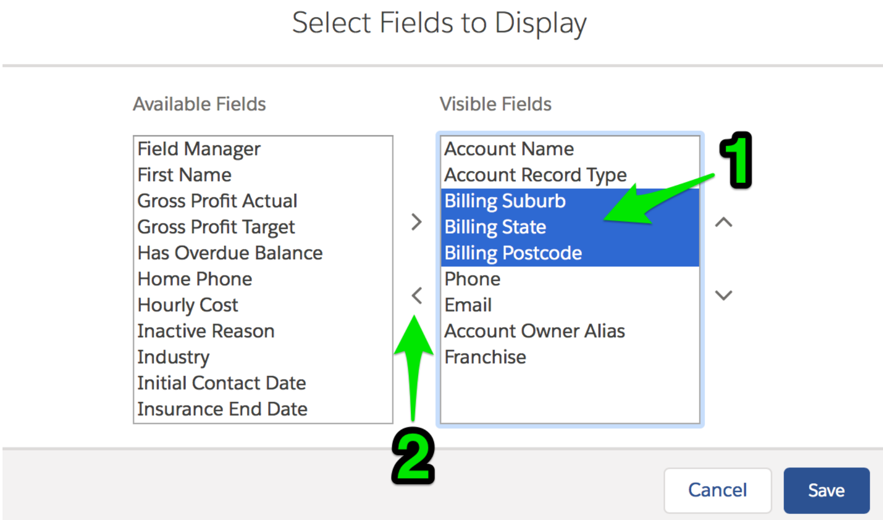
2. Open the **List View Control** and choose **Select Fields to Display**.



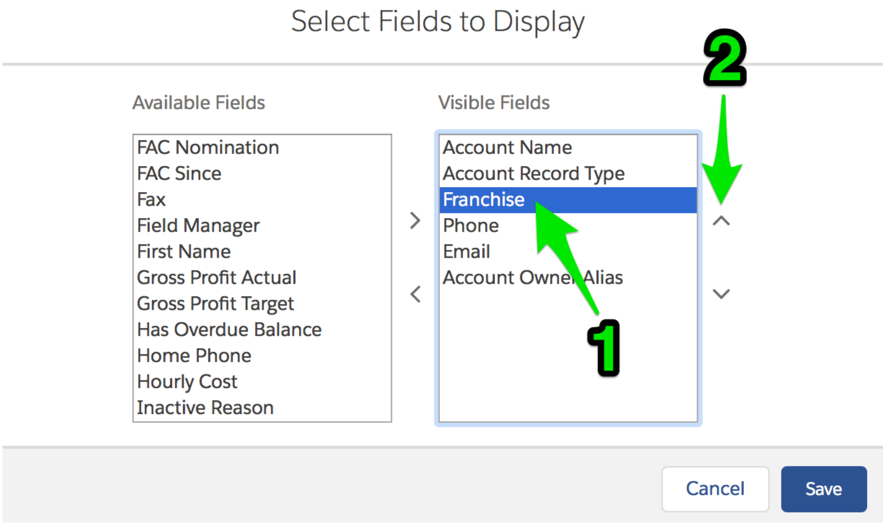
3. From `Available Fields`, select the fields you want to make visible.



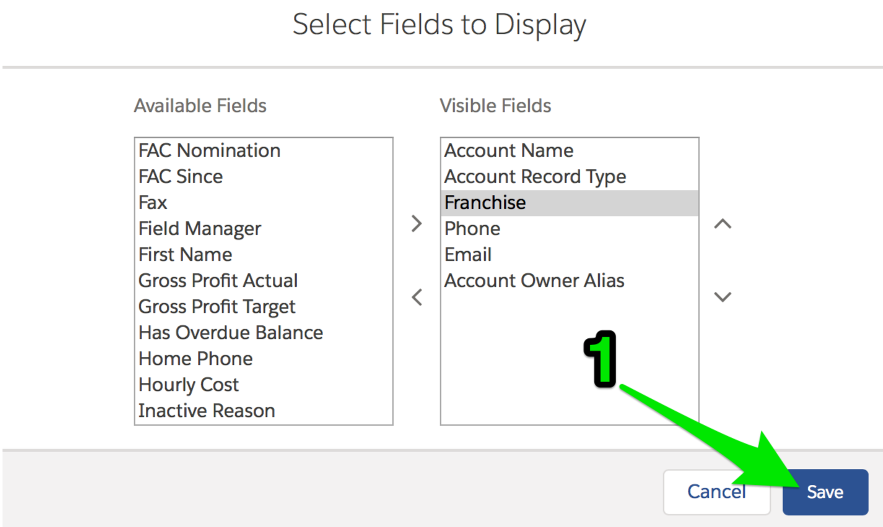
4. Now remove any fields you want not to display.



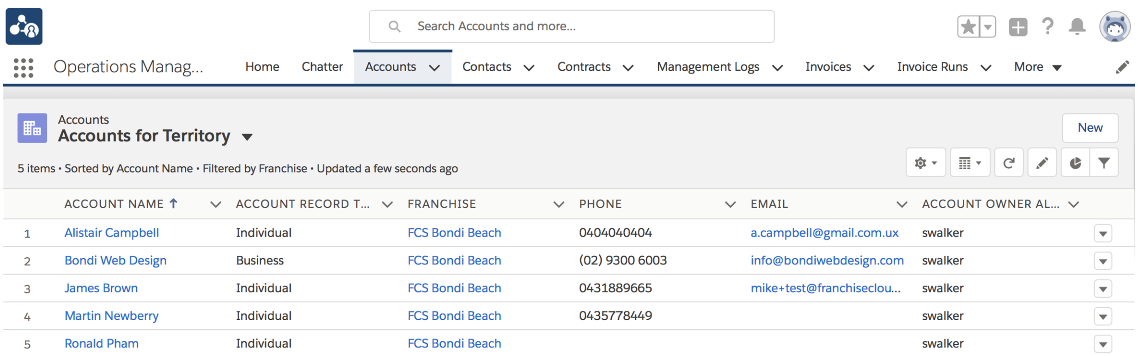
5. Sort the fields into the order you want to see.



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



Now you can see the updated list.

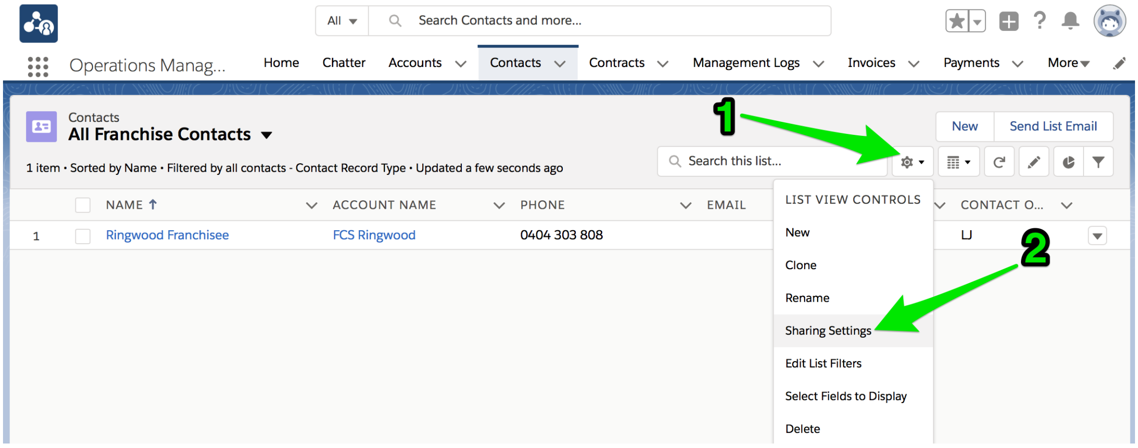


How to share list views

You can share your list views with your colleagues.

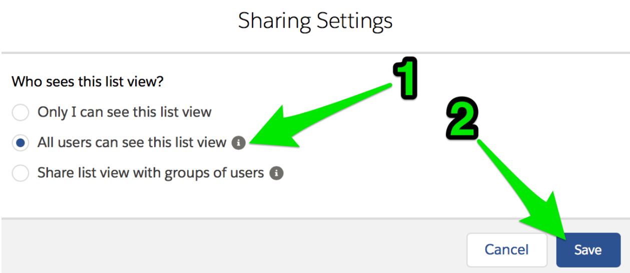
To share a list view

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



The **Sharing Settings** dialog box appears.

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



You have now shared a list view with everyone.

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

CHAPTER 2

Working with Contracts

Understanding contracts

Contracts provide a traceable record of the overall contractual life cycle. Maintaining this history is a key step towards demonstrating compliance with jurisdictional codes of conduct.

Contracts also record current and historical fees. They are stored so that they are machine-readable, and are used for invoice calculation. Machine-readable fee records make invoicing a highly efficient and reliable way of generating invoices that are guaranteed to conform to the contract.

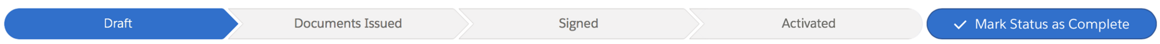
How you use contracts will vary depending on whether you have licensed Franchise Cloud SolutionsFranchise Recruitment product.

- If you have licensed Franchise Recruitment, franchise contracts will be created, generated and possibly signed electronically. These contracts are migrated to Operations Management.
- If you have licensed Operations Management alone, your contracting process will largely happen outside of Operations Management. You will then need to enter information into Operations Management to reflect contract history and current status. When entering data, begin by creating a new contract. Once the franchisee has signed the contract, you will then want to create a Customer Franchise Profile to reflect the entity that fulfills the contract. *See* “How to create a contract” on page 32.

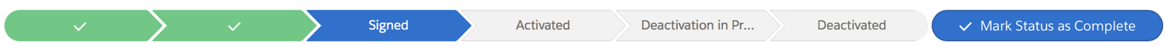
Contract Statuses

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

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



Two more statuses become available after signing.



Here is a summary of each contract status.

Contract Status	Description
Draft	The initial state of a newly-created contract.

Contract Status	Description
Documents Issued	The contract has been issued to the prospective franchisee for consideration. Key fields are now tracked. Changing any key field will set the status back to Draft.
Signed	When the `Customer Signed Date` and the `Customer Signed By` fields are completed, the system automatically advances to the Signed Stage. This indicates that the customer has signed the documents.
Activated	The contract is activated. Fees are being calculated and jobs can be allocated once the franchise begins to trade.
Deactivation in progress	The contract has a planned cessation date in the future and is still currently active.
Deactivated	The contract has ceased.

Draft

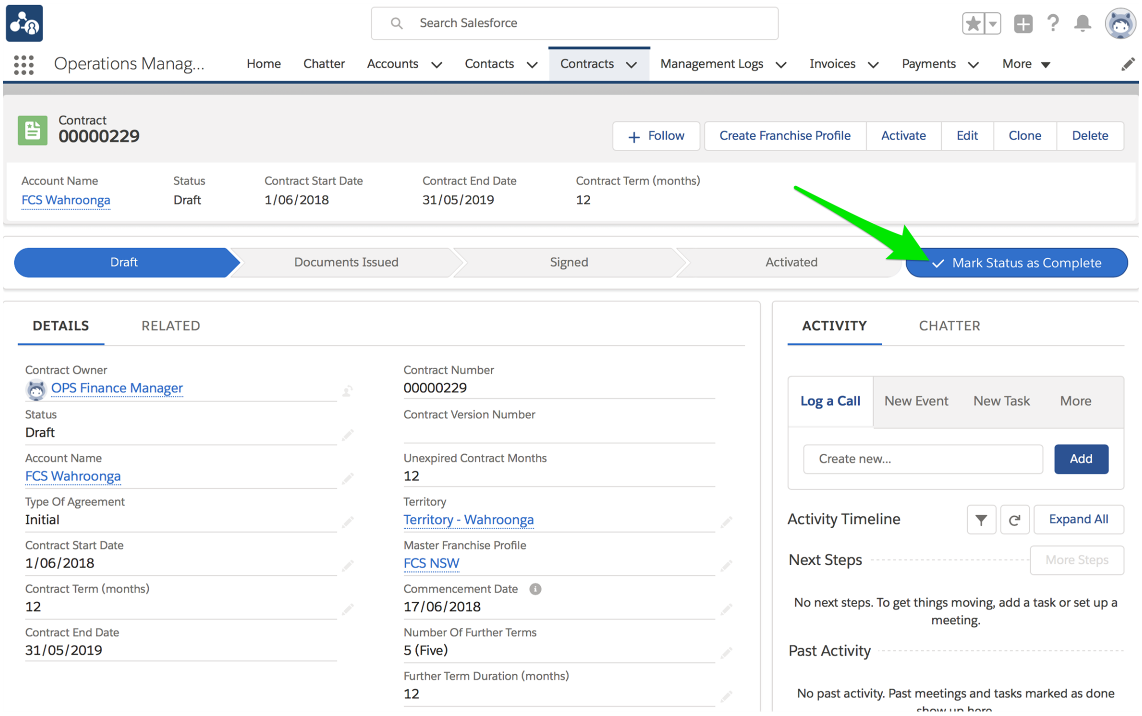
When a contract is first created it is placed in the Draft status. The Draft status is where all the relevant details of the contract are entered and edited. The Draft status is complete when it matches the contract you have (or will) provide to the franchisee for consideration.

Documents issued

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

To place the contract in Documents Issued status

» Press **Mark Status as Complete**



The contract is placed in **Documents Issued** status. The current date is recorded as the `Documents Issued Date`.

> Now that a contract is issued, any changes to key fields will set the contract status back to Draft. The expectation is that you will re-issue the contract to the franchisee for consideration.

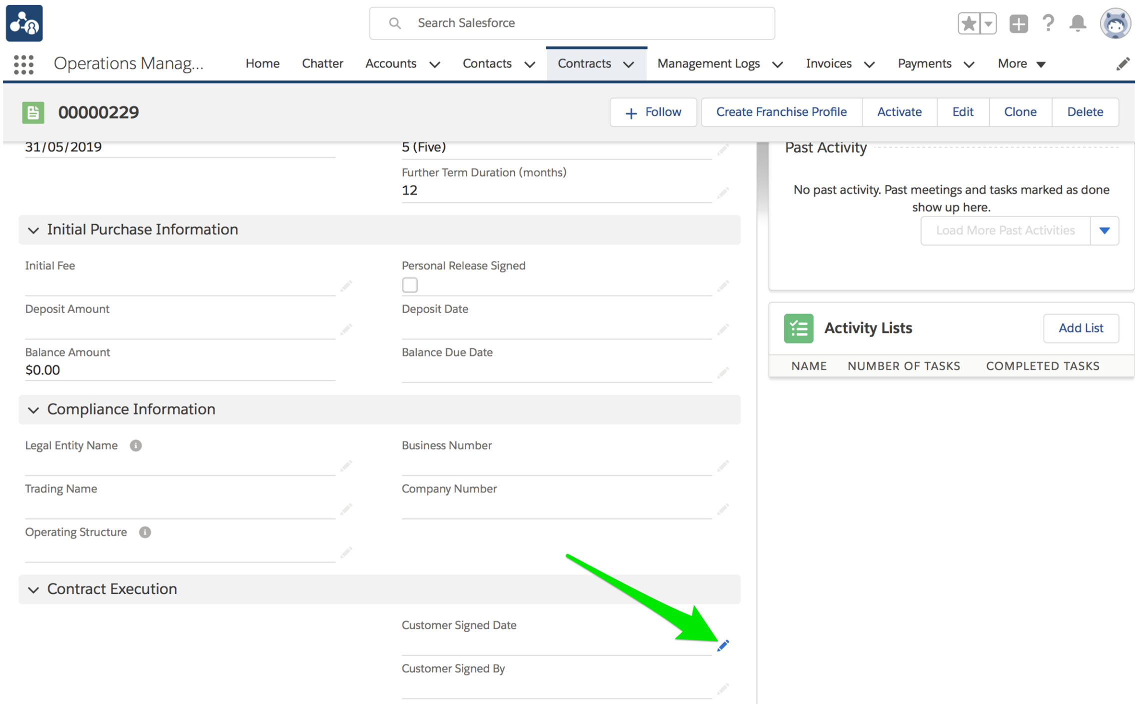
Signed

Contract signed records the date at which the contract is signed by the franchisee. Ensure that this date matches the signature details on the executed contract.

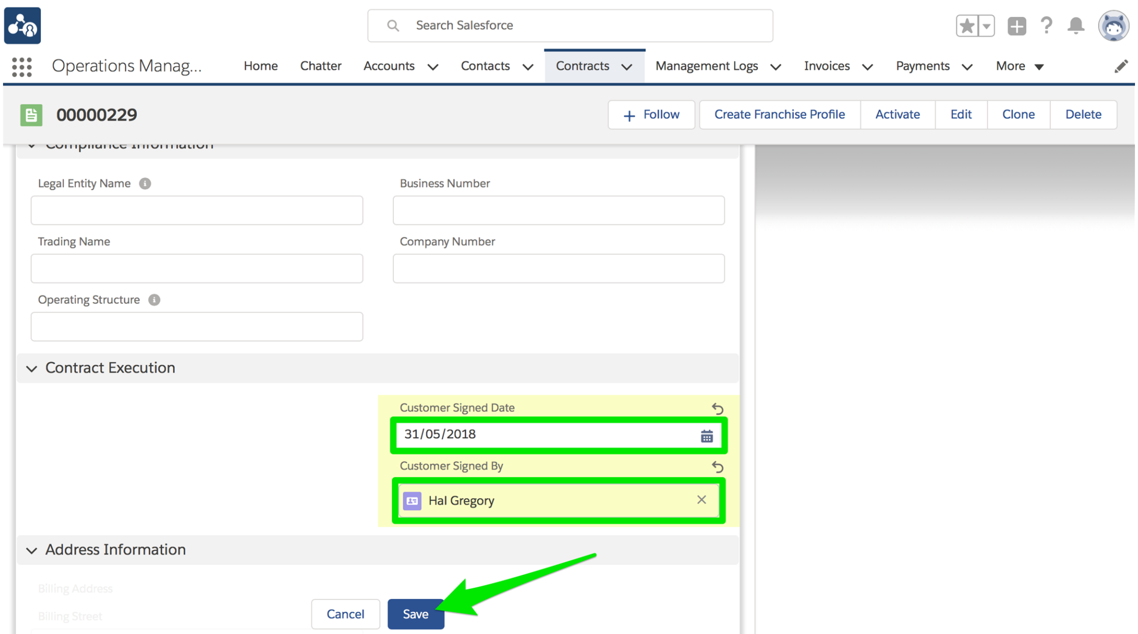
> In compliance with the Australian Competition & Consumer Commission Franchising Code of Conduct, there must be fourteen days between the `Documents Issued Date` and the `Customer Signed Date`.

To mark a contract as signed

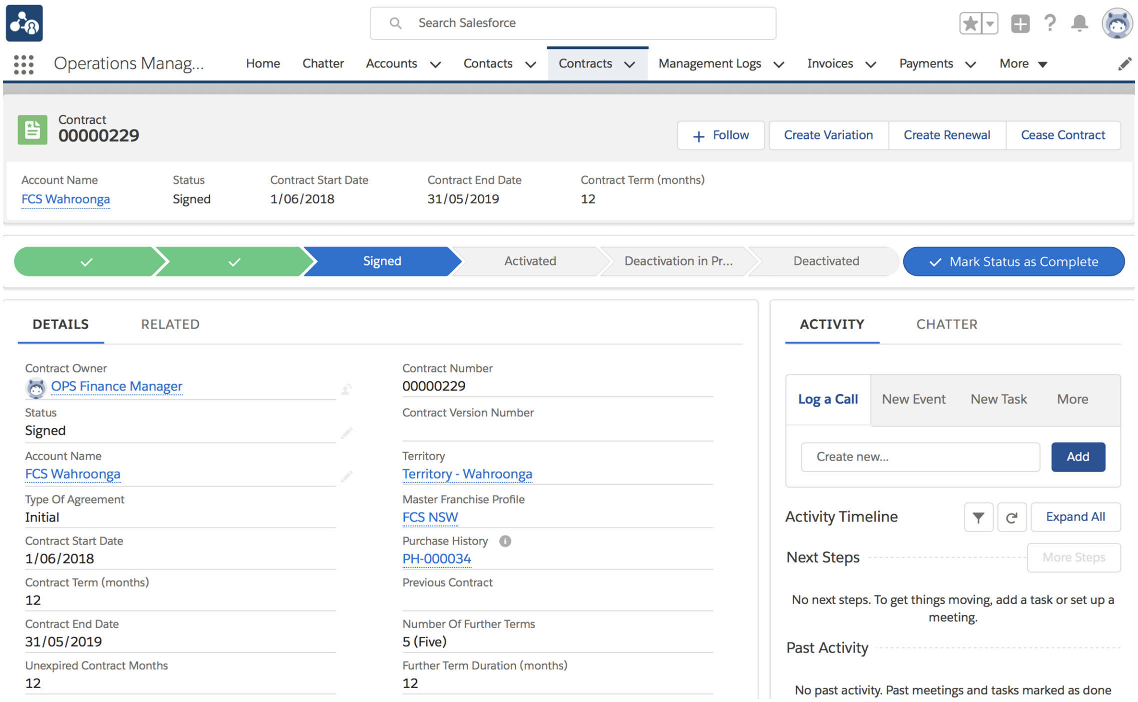
1. From the **Contract**, scroll down to the **Contract Execution** section and press **Edit**.



2. Enter the **Customer Signed Date** and **Customer Signed By** fields.



3. The `Stage` automatically advances to **Signed**.



Once the contract is signed, it is time to create the Franchise Profile Account (How to create a franchise profile account).

The Franchise Profile Account must be created before the planned Activation date otherwise the system will produce an error during Activation.

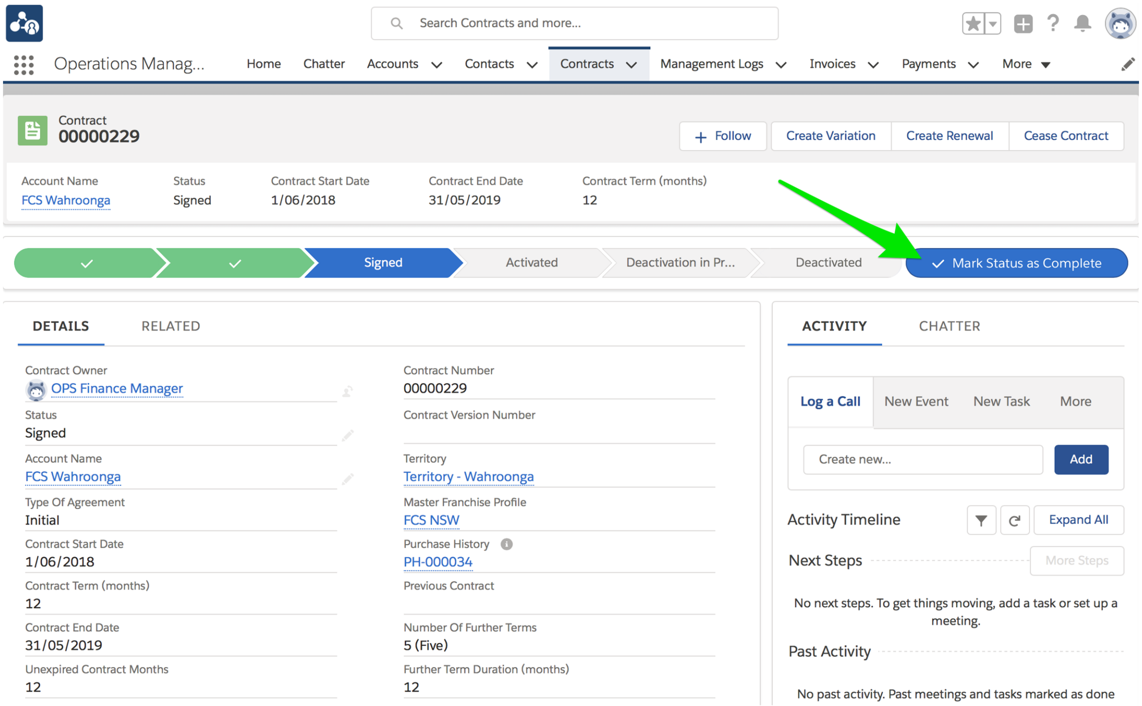
Now that a contract is signed, any changes to key fields requires the creation of a variation. Creating variations helps you keep a history of changes to the contract over time.

Activated

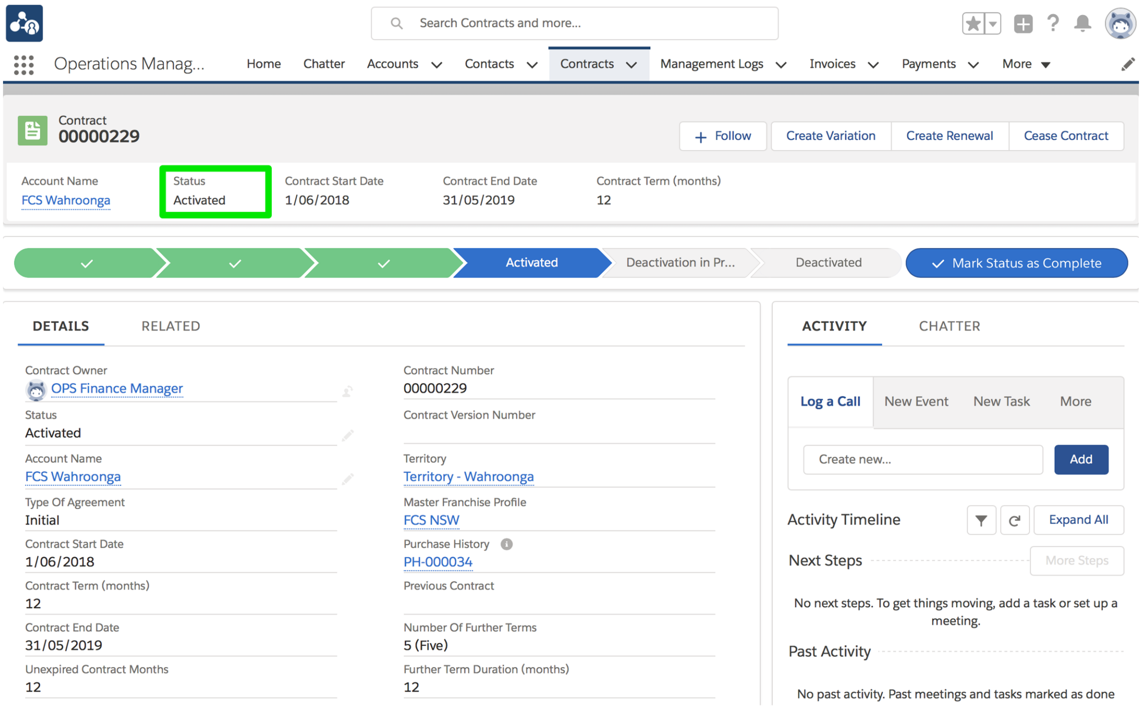
Signed contracts will automatically activate when the commencement date is reached.

To manually activate a contract

» Press **Mark Status as Complete**



The contract is now activated.

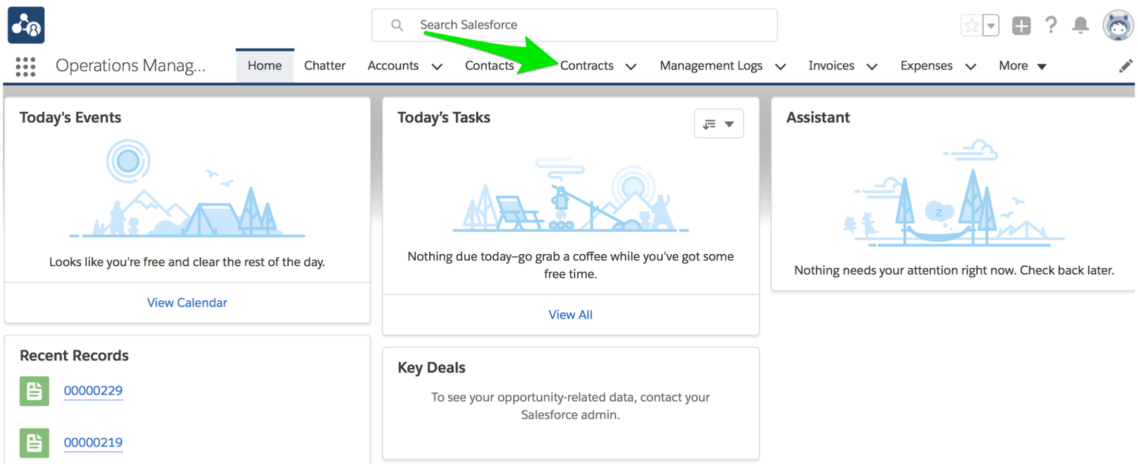


How to create a contract

When you are bringing new franchisees on-board, you begin to reflect this activity in Operations Management by creating a new contract.

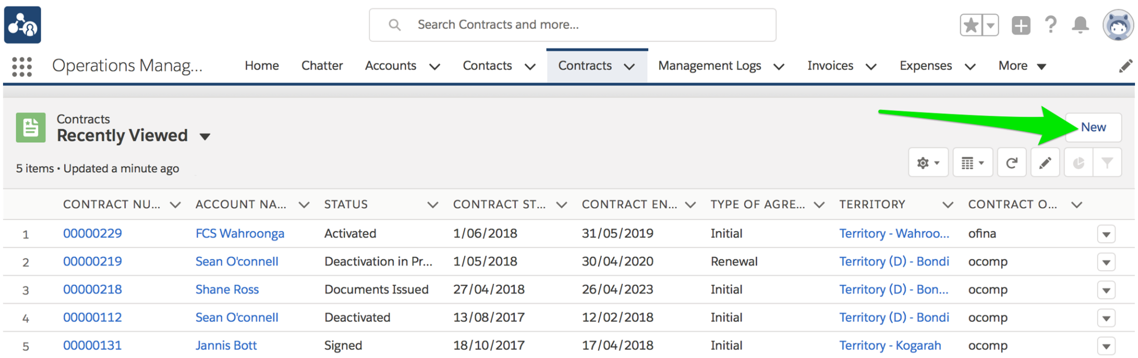
To create a contract

1. From the Salesforce menu, select **Contracts**.



The **Recently Viewed** list view displays. This list may be empty.

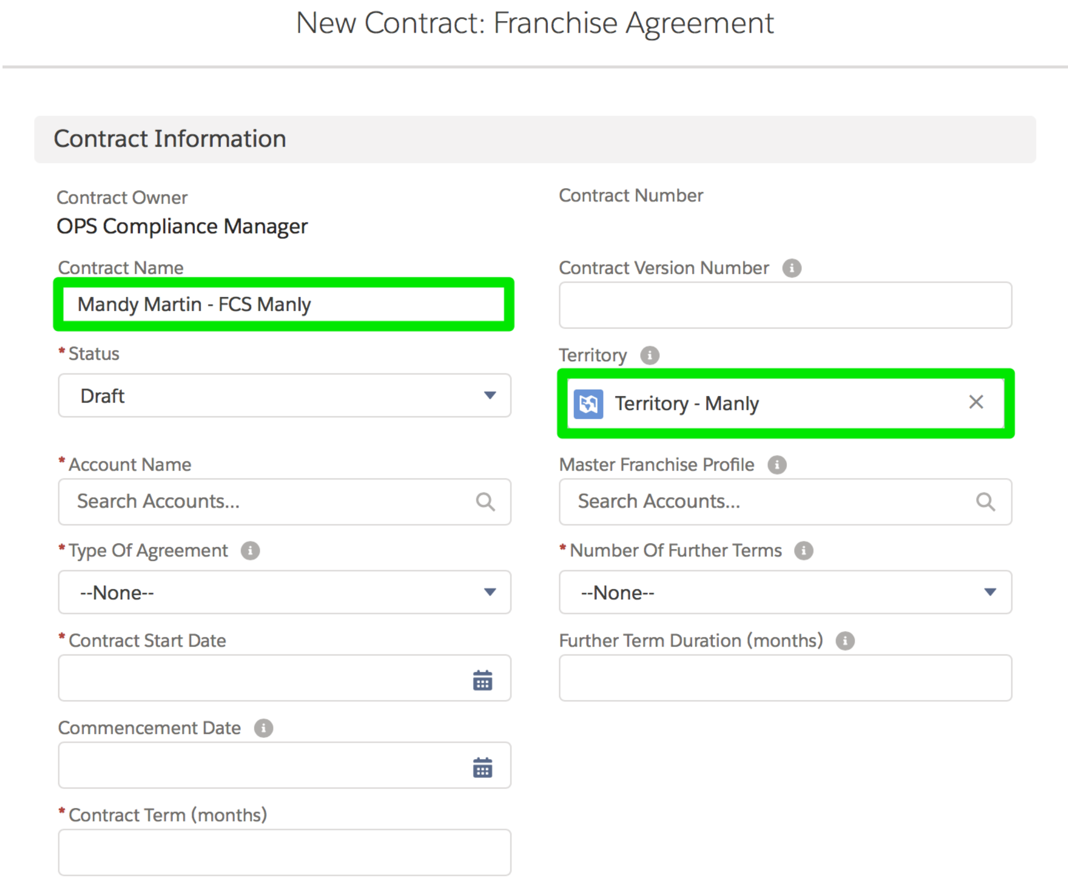
2. Press the **New** button.



The **New Contract** dialog box appears.

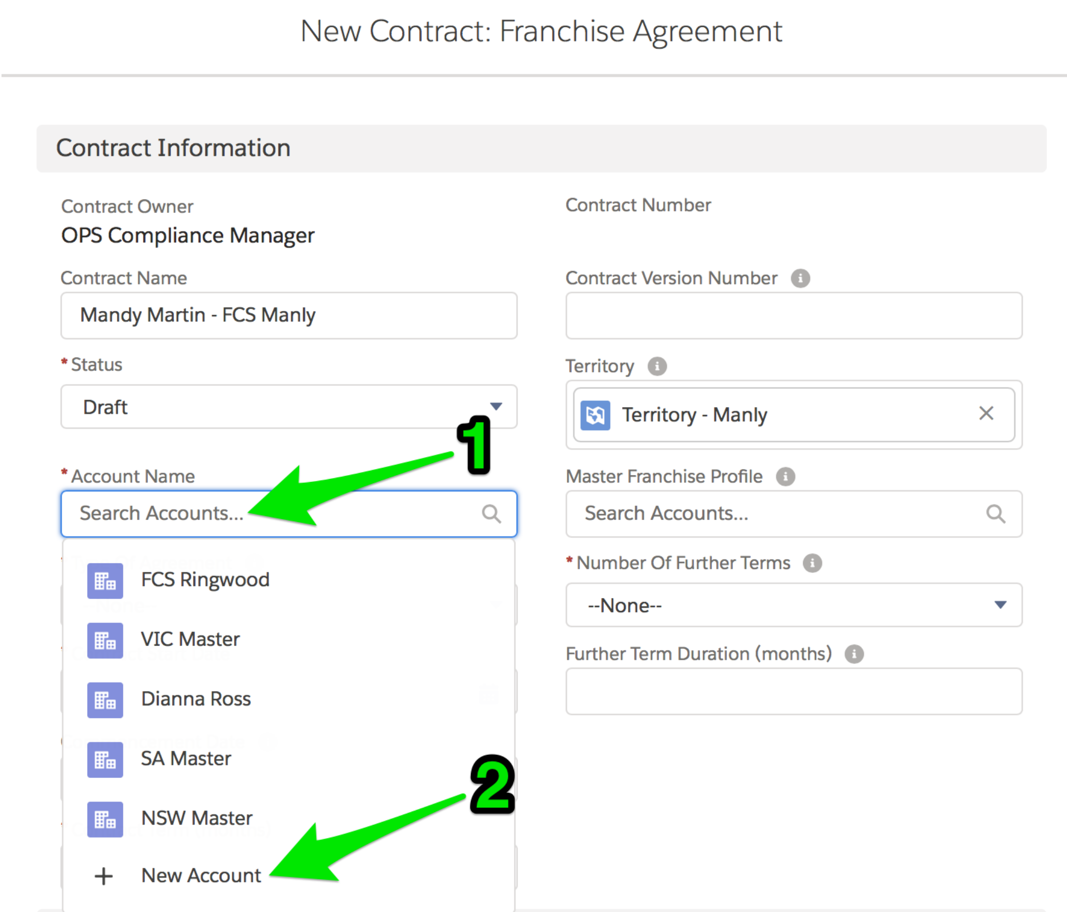
3. Select the `Franchise Agreement` option and press **Next**.

4. Enter a **Contract Name** and select the proposed **Territory**.



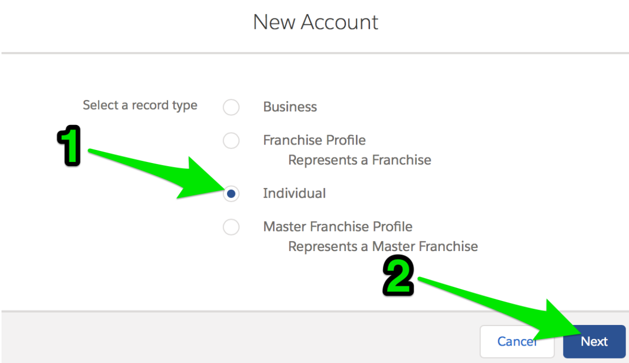
5. To represent a brand new **Contract**, leave the `Status` at *`Draft`*.

6. You will need to associate the contract with an **Account**. For a new franchisee, you will need to create an account for the person or entity who will be purchasing the franchise.



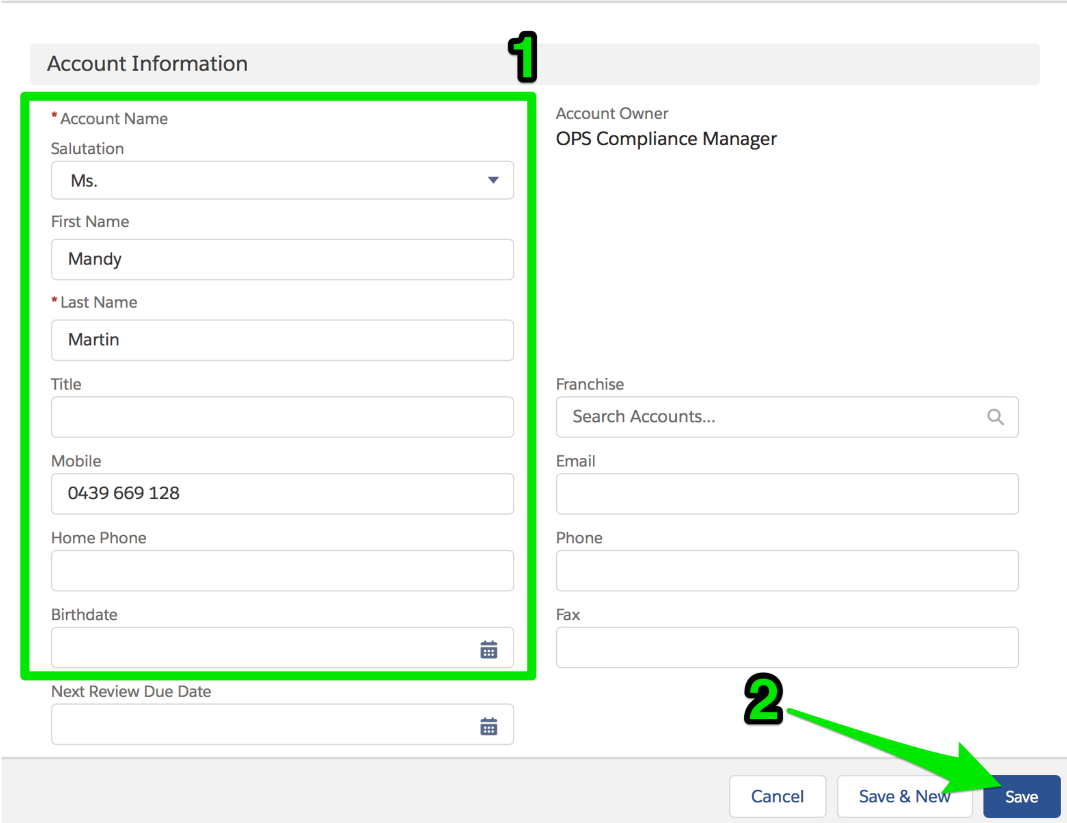
The **New Account** dialog appears.

7. For a franchisee sale, generally choose an `Individual` account, then press **Next**.



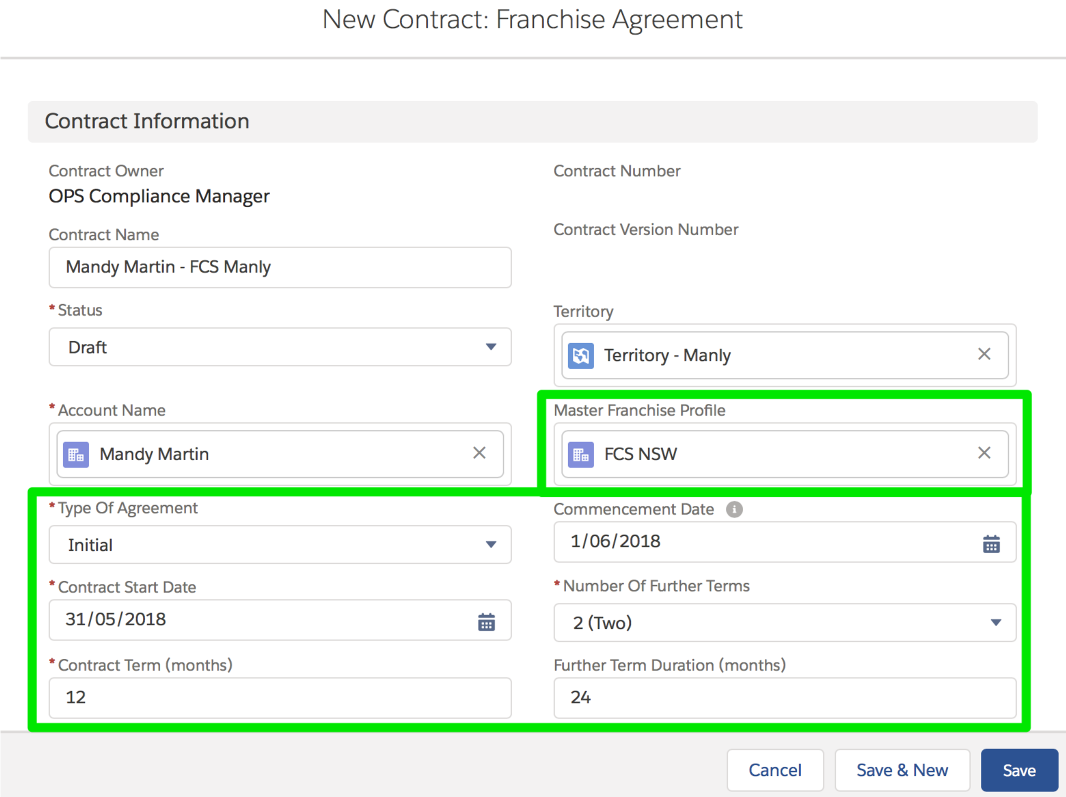
8. Enter the individual's name and contact details, then press **Save**.

New Account: Individual



The **New Contract** dialog box is re-displayed.

9. Now enter the remainder of the mandatory fields and any other information you may have to hand.

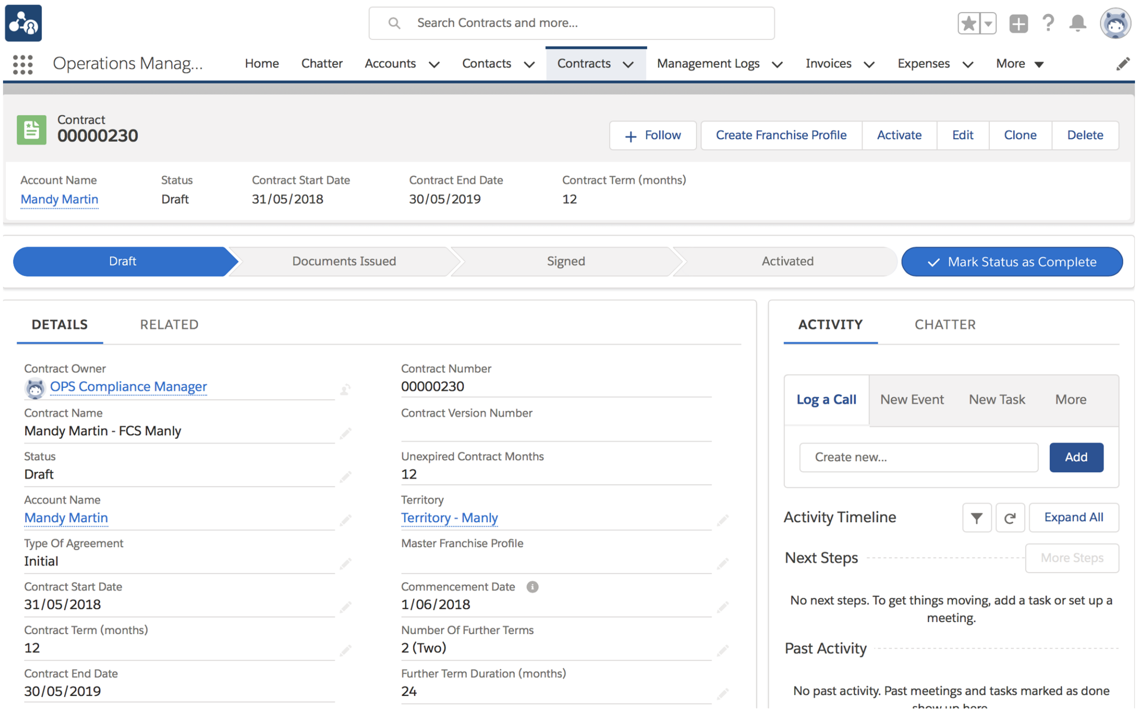


10. If you have the information to hand, you can enter as much or as little of the subsequent sections.

- Initial Purchase Information
- Compliance Information
- Contract Execution
- Address Information

11. When complete, press **Save**.

The new **Contract** is displayed.



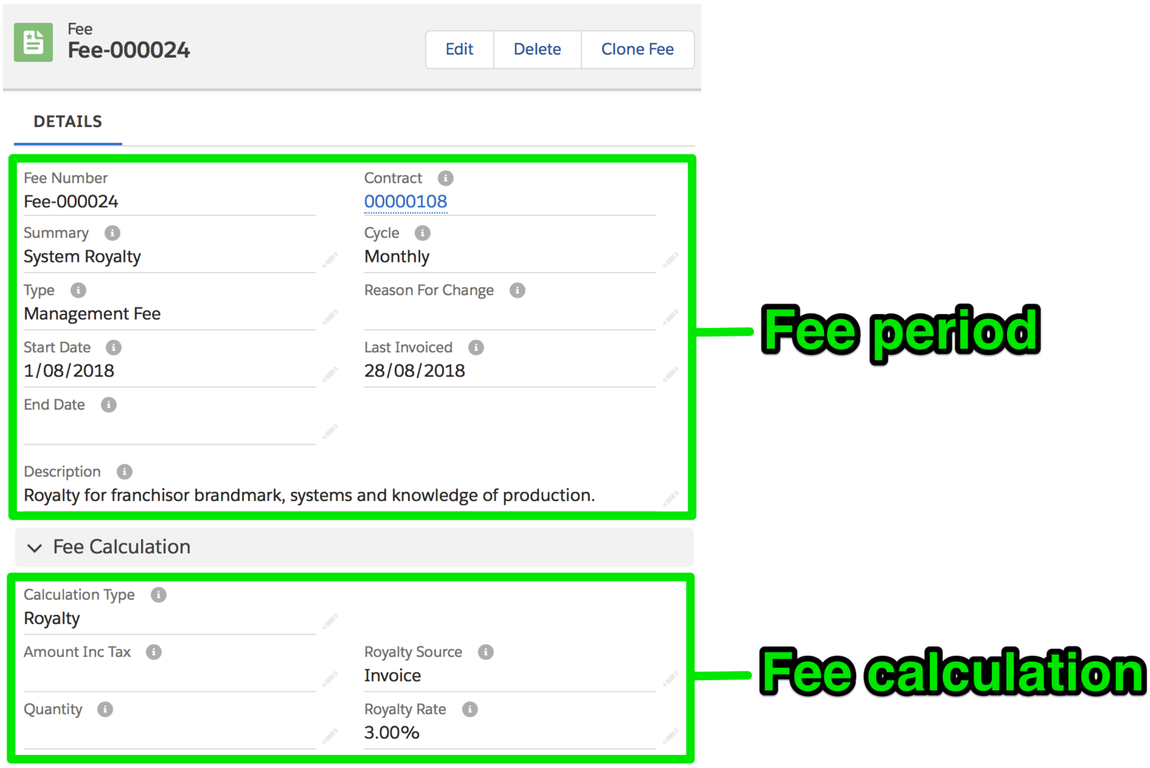
Contract fees

Understanding contract fees

In Operations Management, contracts contain fee records. Fee records are used to document financial aspects of the contractual agreement with a franchisee. They are also used to calculate fees for inclusion on periodic invoices. Generating invoices using contract fees saves labor, increases accuracy and allows Operations Management to maintain records of all invoiced fees for compliance purposes.

Each fee record specifies two types of information

- Fee period– the start date, end date and cycle at which the fee is charged
- Fee calculation – how a fee is calculated each time it is invoiced

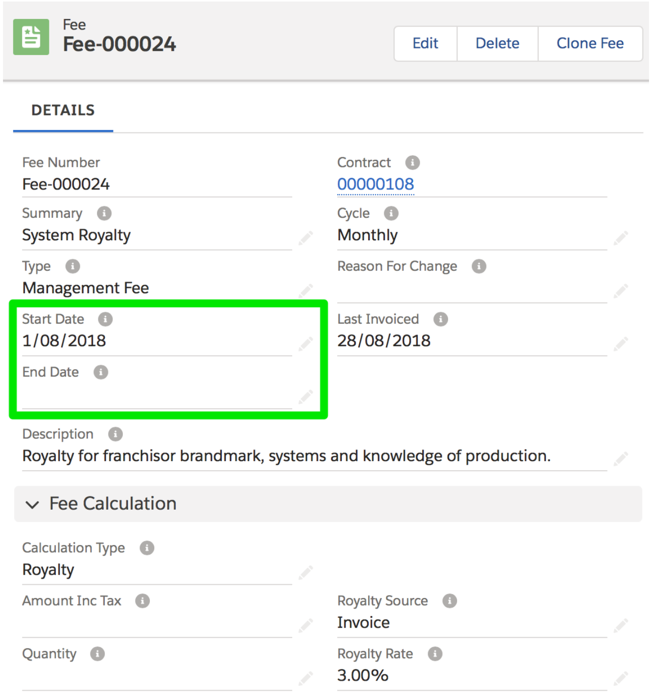


Fee periods

Fee periods define how often a fee is collected within the given duration. The duration is defined by the start and end dates, and the frequency is defined by the selected cycle.

Start and End Dates

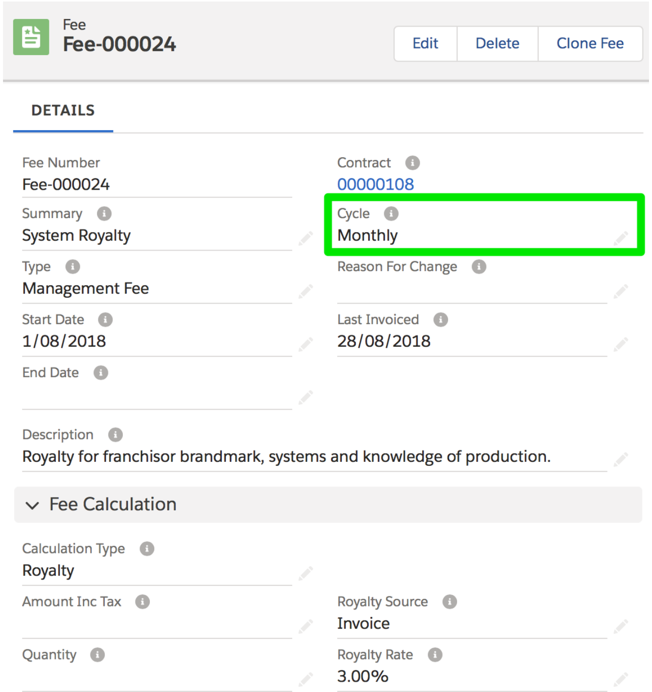
The period over which fees are charged begin at the date specified by `Start Date`. Setting an `End Date` is optional. When there is no `End Date`, the fee will be charged in every successive cycle until the contract is deactivated. When you do set `End Date`, this fee will not be charged after the specified date.



When you perform annual fee adjustments for CPI increases, it is useful to set the expiring fee's `End Date` and to create a new fee record to represent the adjusted fee value. That way you maintain a record of the value of all fees that have been charged under that contract.

Cycles

Each fee has a specified cycle.



Available cycles are

- Daily
- Weekly
- Fortnightly (every second week)
- Monthly
- Quarterly
- Annually

Using different cycles for different fees allows you the flexibility of charging fees at different frequencies.

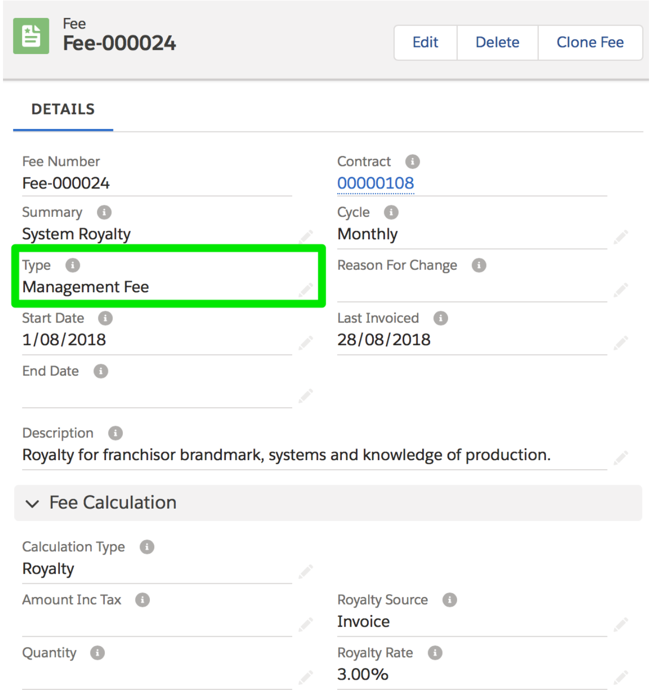
> For example, a contract may use a fixed annual fee, a monthly fee based on invoices, and a weekly fee based on POS receipts.

Fee types

Some franchisors issue multiple monthly invoices.

> For example, they may issue management fees on the first of the month and POS-based royalties on the fifteenth day of the month.

To enable multiple invoices to be issued using the same cycle, Operations Management allows you distinguish fees of one type from another.



When you are constructing an Invoice Run, you can choose to select specific types of fees into the run. Typical examples of fee types are management fees, software subscriptions, advertising and communications levies.

> The fee type will often also appear on the generated invoice beside the fee name in order to help franchisees understand what the fee is for.

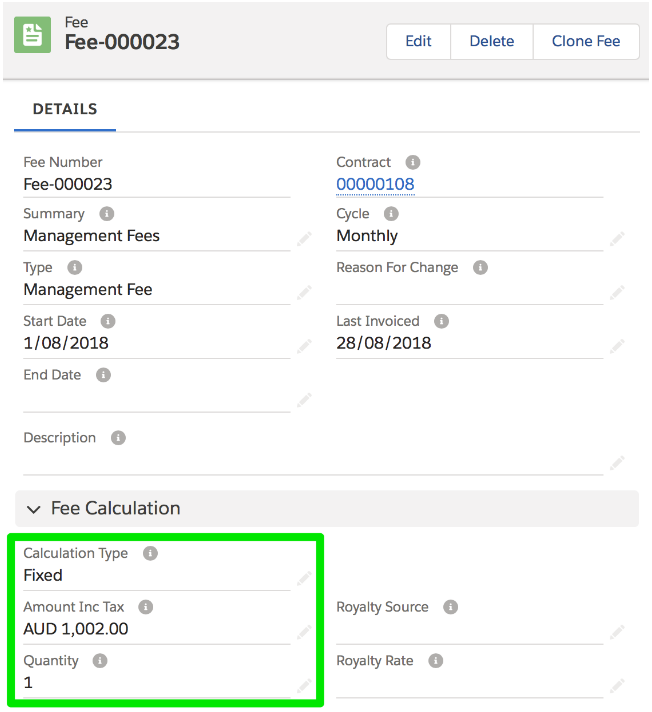
Fee calculations

Fee calculations describe the way in which fees are calculated every invoice cycle. There are two types of fee calculations

- Fixed fees – fees that levy specific dollar amounts
- Royalties – fees that are levied in proportion to invoice or POS values

Fixed fees

Fixed fees represent concrete dollar amounts. When you complete a fixed fee, you need to specify that the `Calculation Type` is *Fixed*, the value of the `Amount Inc Tax`, and the `Quantity`.



`Quantity` allows you to treat the `Amount Inc Tax` as if it represents a package.

For example, you might offer your franchisees "advertising packages," where the franchisee may select additional packages. Where a franchisee selects two package units, you can enter the `Quantity` as *2* in order to double the amount charged for this particular fee.

The per unit `Amount Inc Tax`, `Quantity` and calculated sub-total usually all display on the franchisee invoice, depending on the configuration of your invoice template.

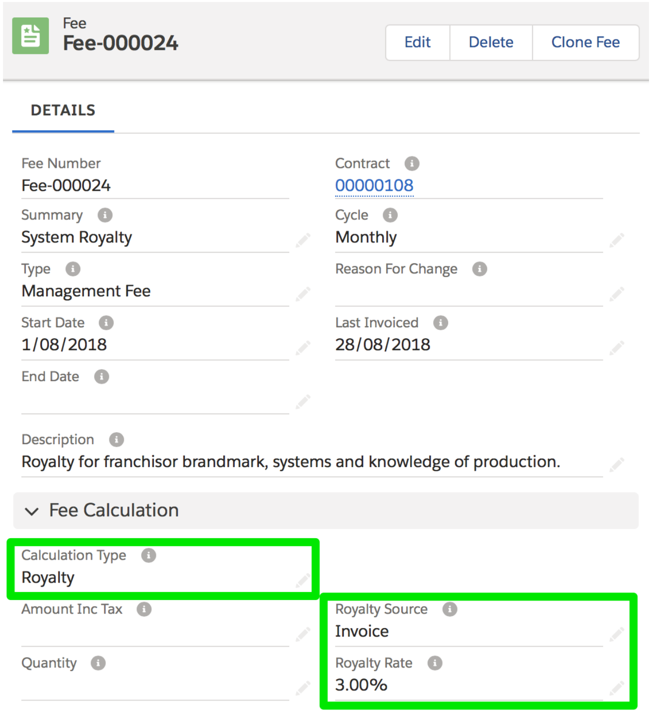
Royalty fees

Royalty fees represent fees that vary in proportion to a measure of business activity. Available measures include

- Invoice – the value of invoices issued in the given period
- POS – the value of POS transactions in the given period

POS data is imported into Operations Management from a POS data provider.

When you complete a royalty fee, you need to specify that the `Calculation Type` is *Royalty*, the `Royalty Source` is either *Invoice* or *POS*, and the `Rate` is set to a percentage value.

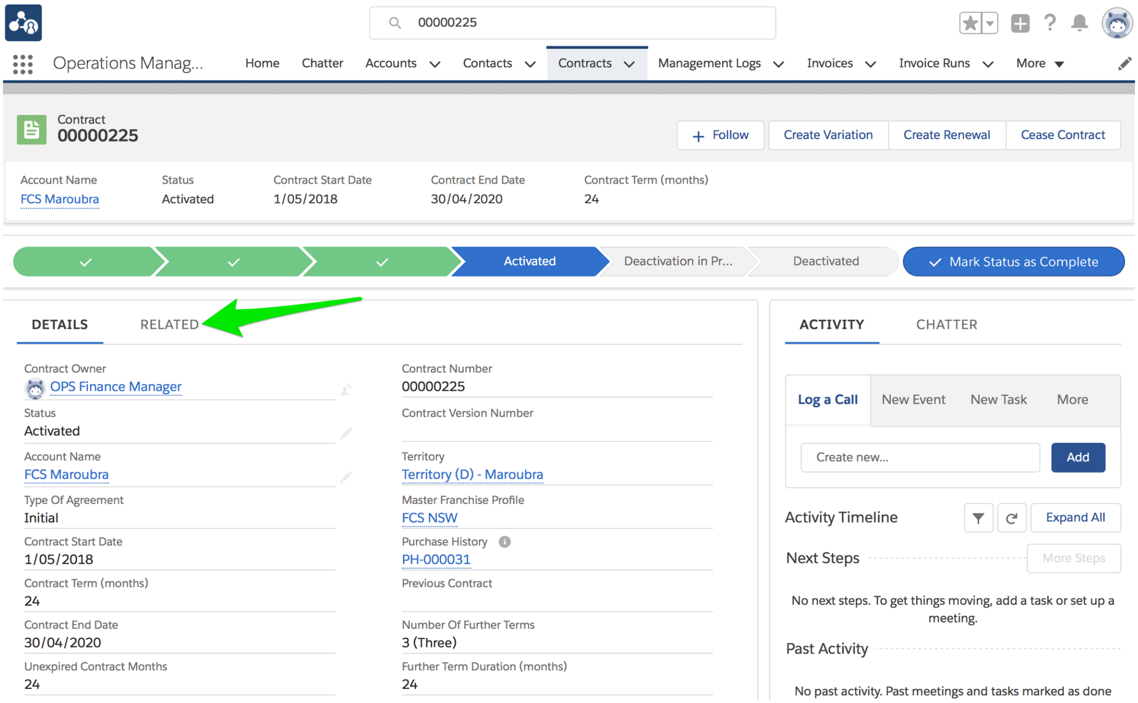

Fee
Fee-000024
Edit
Delete
Clone Fee
DETAILS
Fee Number
Fee-000024
Contract
00000108
Summary
System Royalty
Cycle
Monthly
Type
Management Fee
Reason For Change
Start Date
1/08/2018
Last Invoiced
28/08/2018
End Date
Description
Royalty for franchisor brandmark, systems and knowledge of production.
Fee Calculation
Calculation Type
Royalty
Amount Inc Tax
Royalty Source
Invoice
Quantity
Royalty Rate
3.00%

How to view all fees on a contract

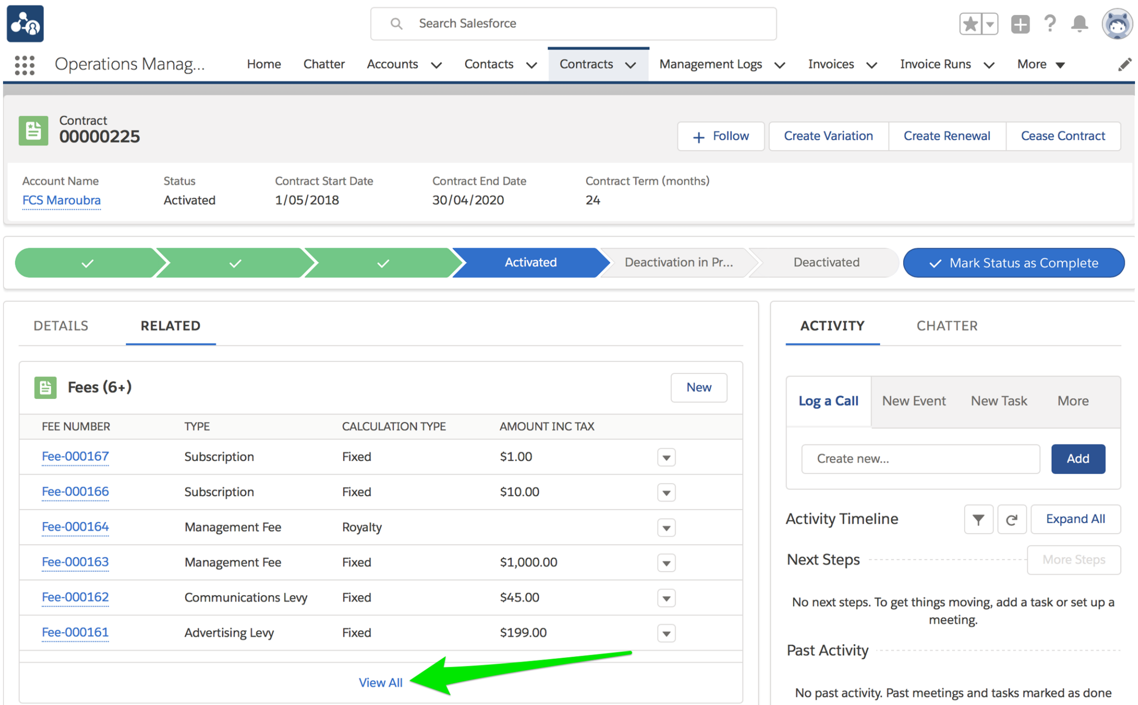
Here is the best way to see all the fees on a contract.

To view all fees on a contract

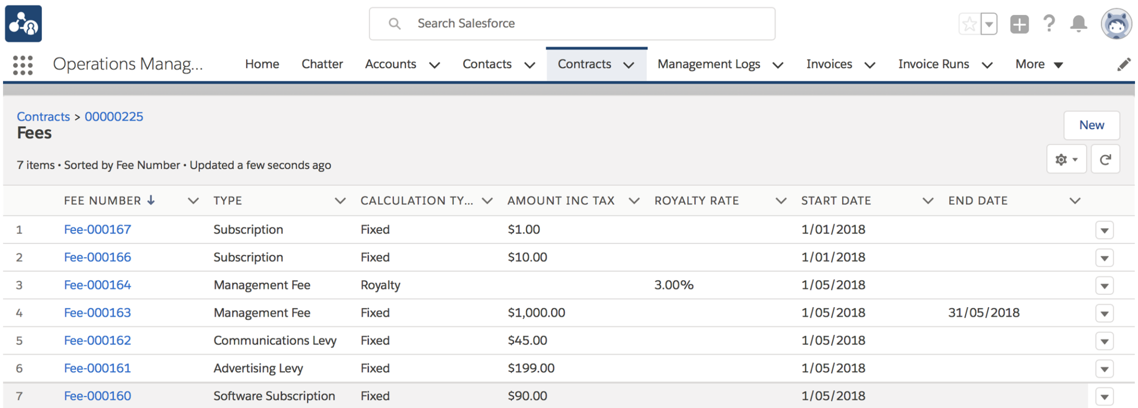
1. From the **Contract**, select the **Related** tab.



2. From the **Fees** section, press **View All**.



The **Fees** list appears with a summary of fee details.



How to add a contract fee

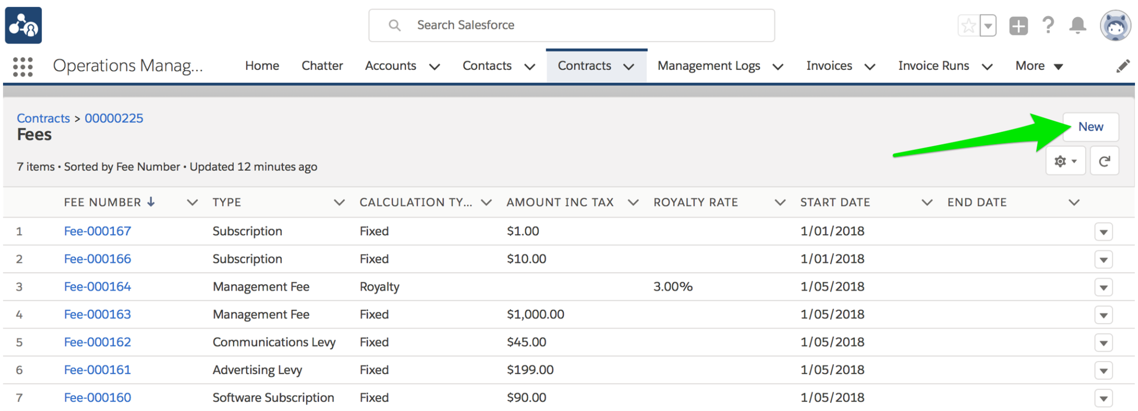
Contract fees are typically added:

- during contract negotiation
- at the conclusion of contract negotiation
- during the operation of the contract as allowed for within the contract terms

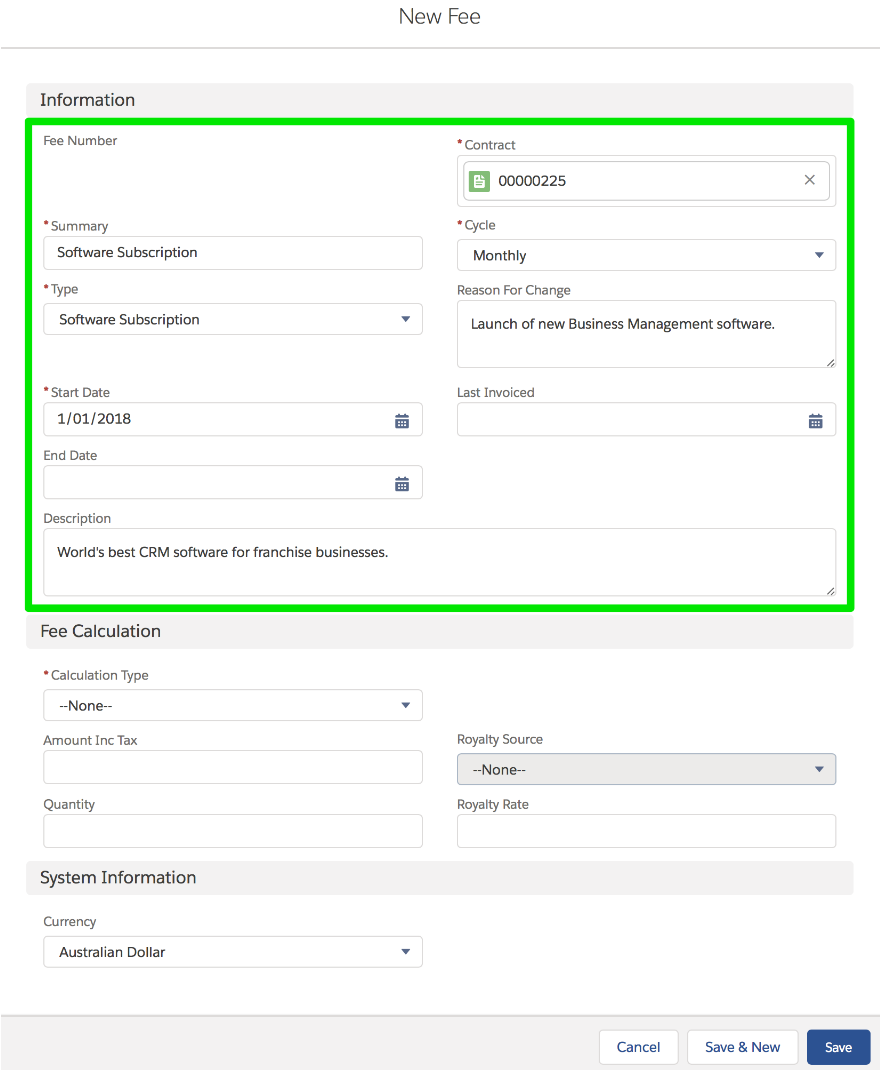
> While the system does not monitor changes in the contract fee schedule, any changes after signing not already provided for by the terms of the contract requires signing a variation to the contract. The system does not monitor or flag the need for variations based on fee changes. Contract variations can be issued.

To add a new fee

1. View all fees on a contract. *See* "How to view all fees on a contract" on page 44.
2. From the **Fees** list, press **New**.



3. In the **New Fee** dialog box, configure the fee information.



`Cycle` and `Type` can affect which invoice run includes this fee.

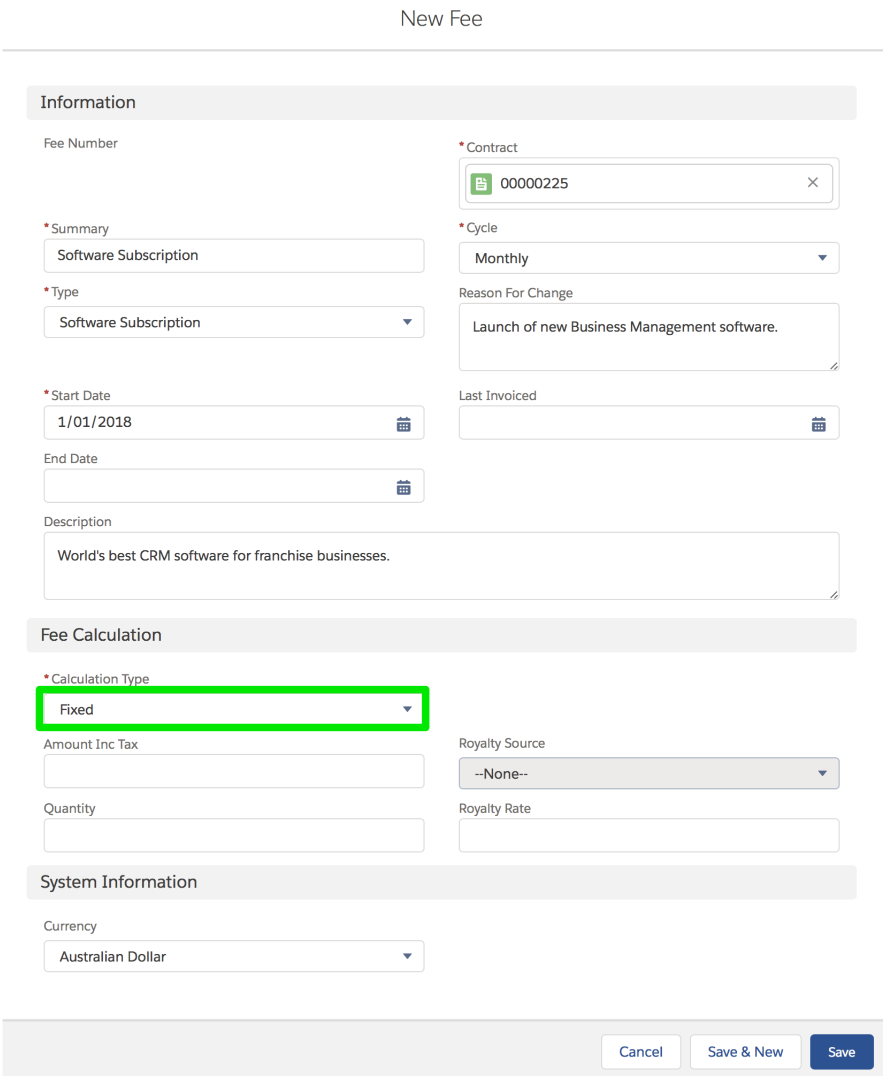
4. Complete the **Fee Calculation**.
   - For a fixed fee, How to configure a fixed fee.
   - For a royalty, How to configure a royalty.
5. When complete, press **Save**.

How to configure a fixed fee

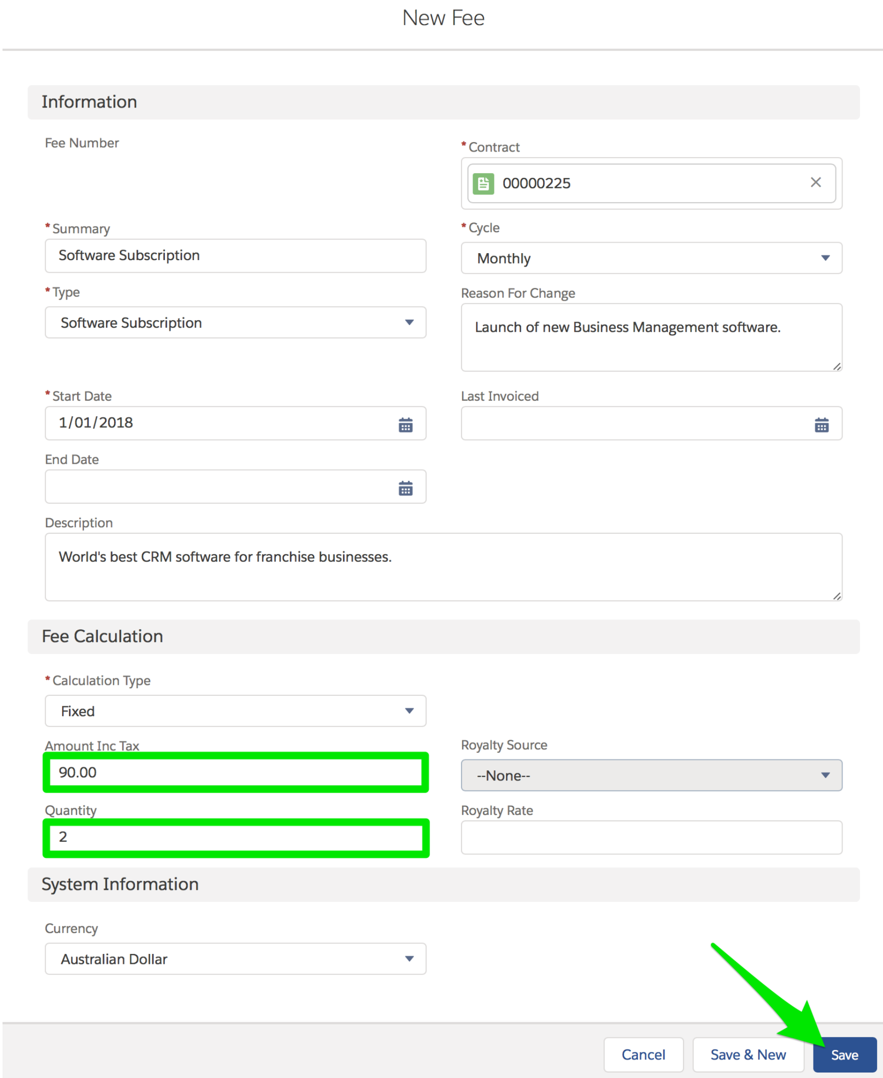
Fixed fees enable you to charge a specified amount per contract cycle.

To configure a fixed fee

1. From the `Calculation Type` field, select *`Fixed`*.



2. Enter the value and quantity of the item.

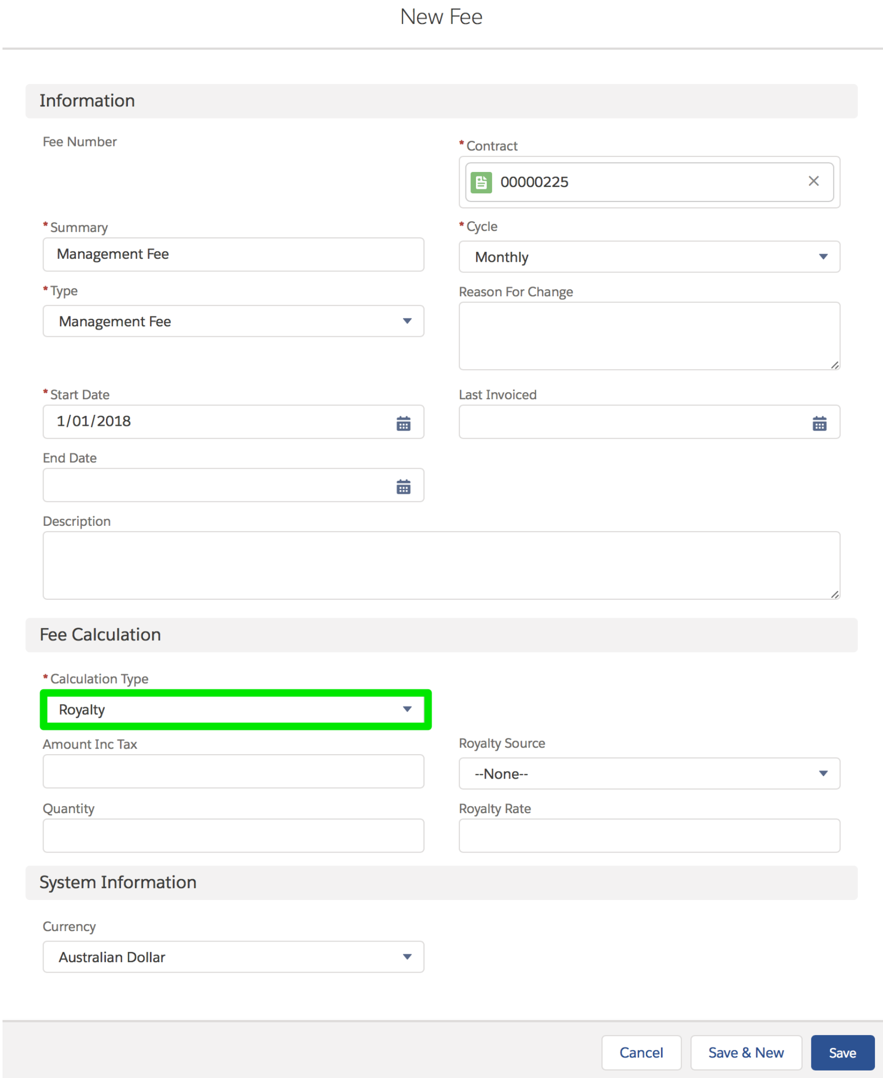


How to configure a royalty

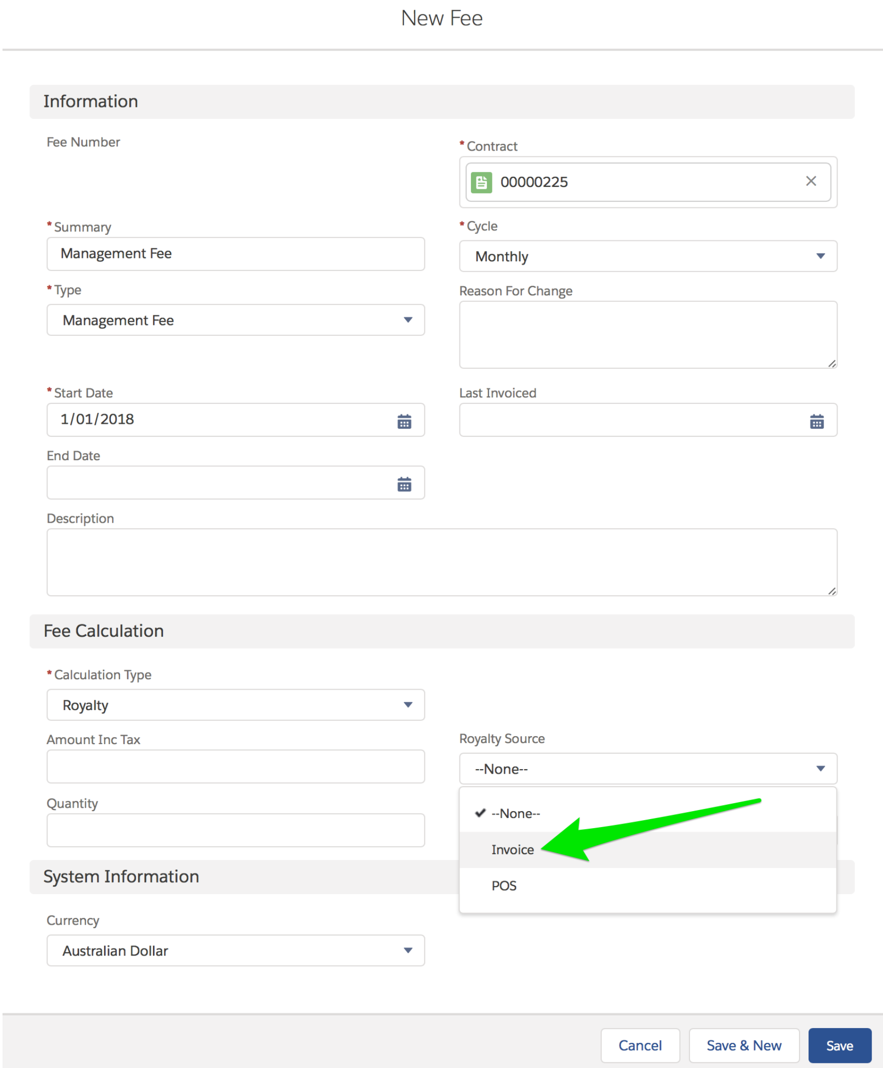
Royalties allow you to charge a percentage of revenue. You can calculate a royalty based on invoices or on data imported from POS records.

To configure a royalty

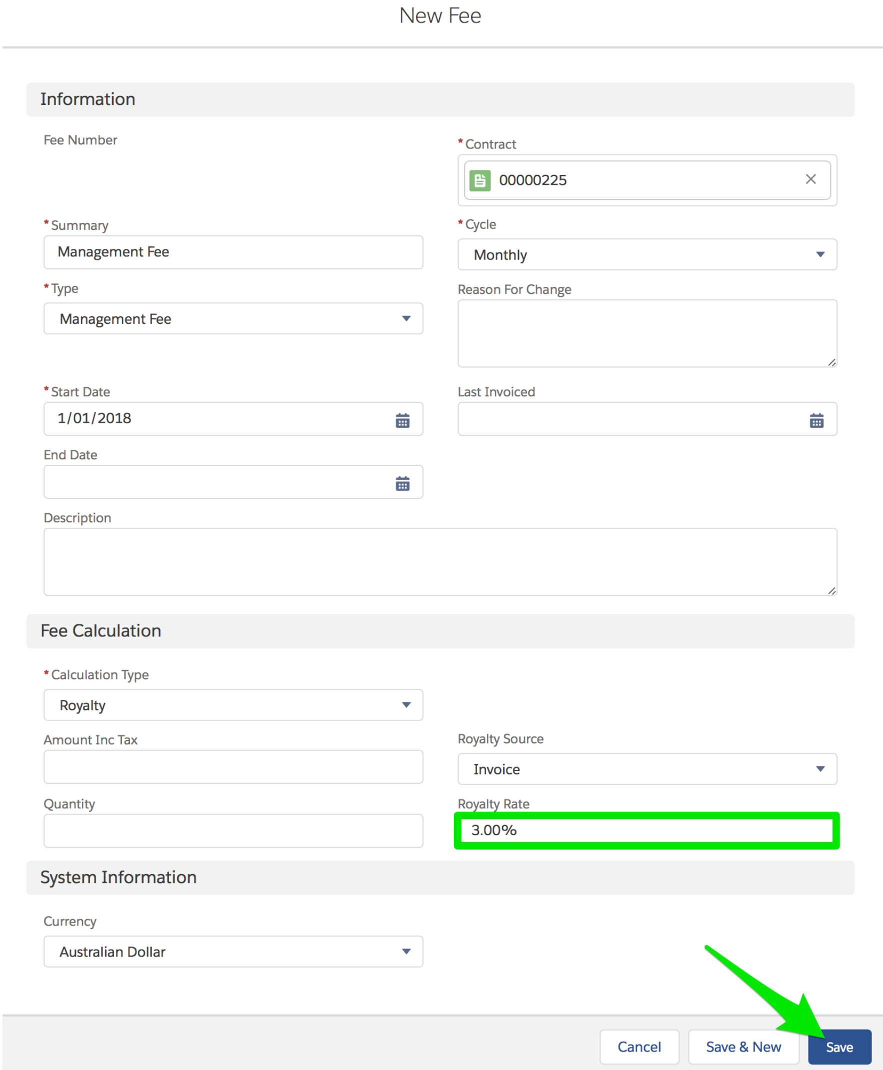
1. From the `Calculation Type` field, select *`Royalty`*.



2. From `Royalty Source`, choose which revenue record will be used to calculate the fee.



3. In **Royalty Rate**, enter the percentage value, then press **Save**.



How to adjust a contract fee

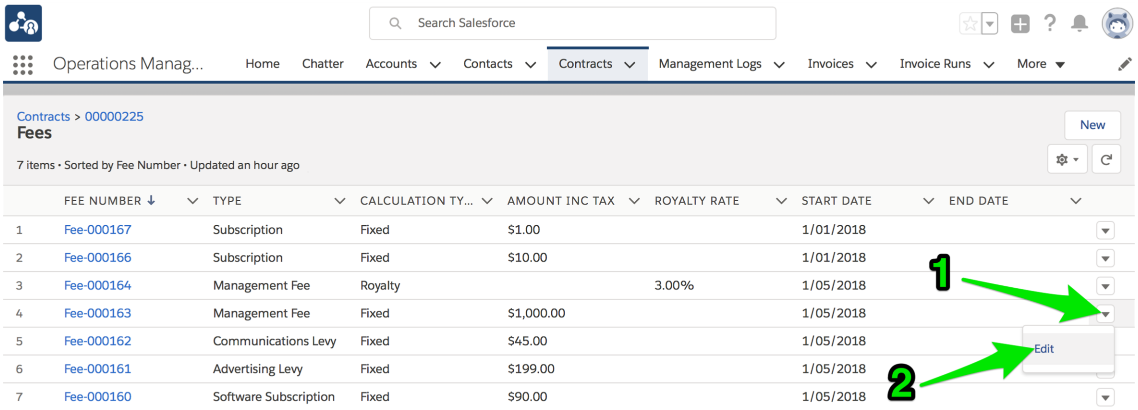
There are times when you need to change a contract fee.

> Annual CPI adjustments routinely require you to change fixed fees.

When you change a contract fee, you need to expire the current fee and then add a new fee. This is necessary to enable any further trailing fees at the current rate to be charged before switching to the new rate. It also maintains a record as to the fees historically charged on a contract.

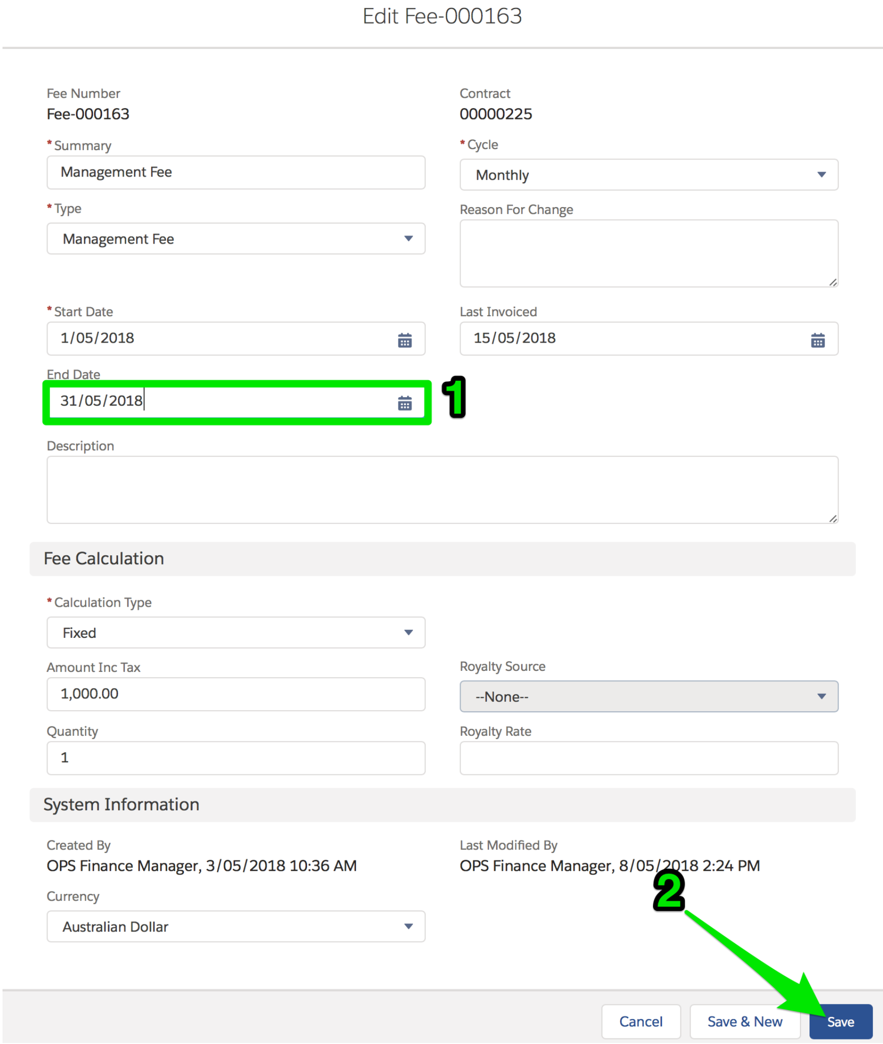
To expire a contract fee

1. View all fees on a contract. *See* "How to view all fees on a contract" on page 44.
2. From the **Fees** list, locate the fee and select the **Edit** button.

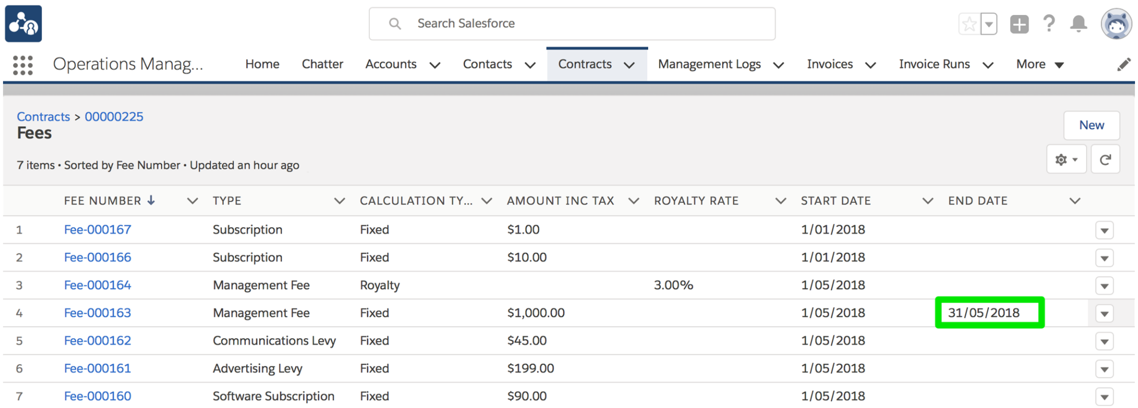


The **Edit Fee** dialog box opens.

3. From the **Edit Fee** dialog box, Enter an `End Date`, then press **Save**.



The fee is now listed as having an **End Date**.



This is the last date at which this fee will be charged.

4. Now that you have ended the previous fee, add a new fee to the contract. This new fee will serve as the “adjusted fee.” *See* “How to add a contract fee” on page 46.

How to vary a contract

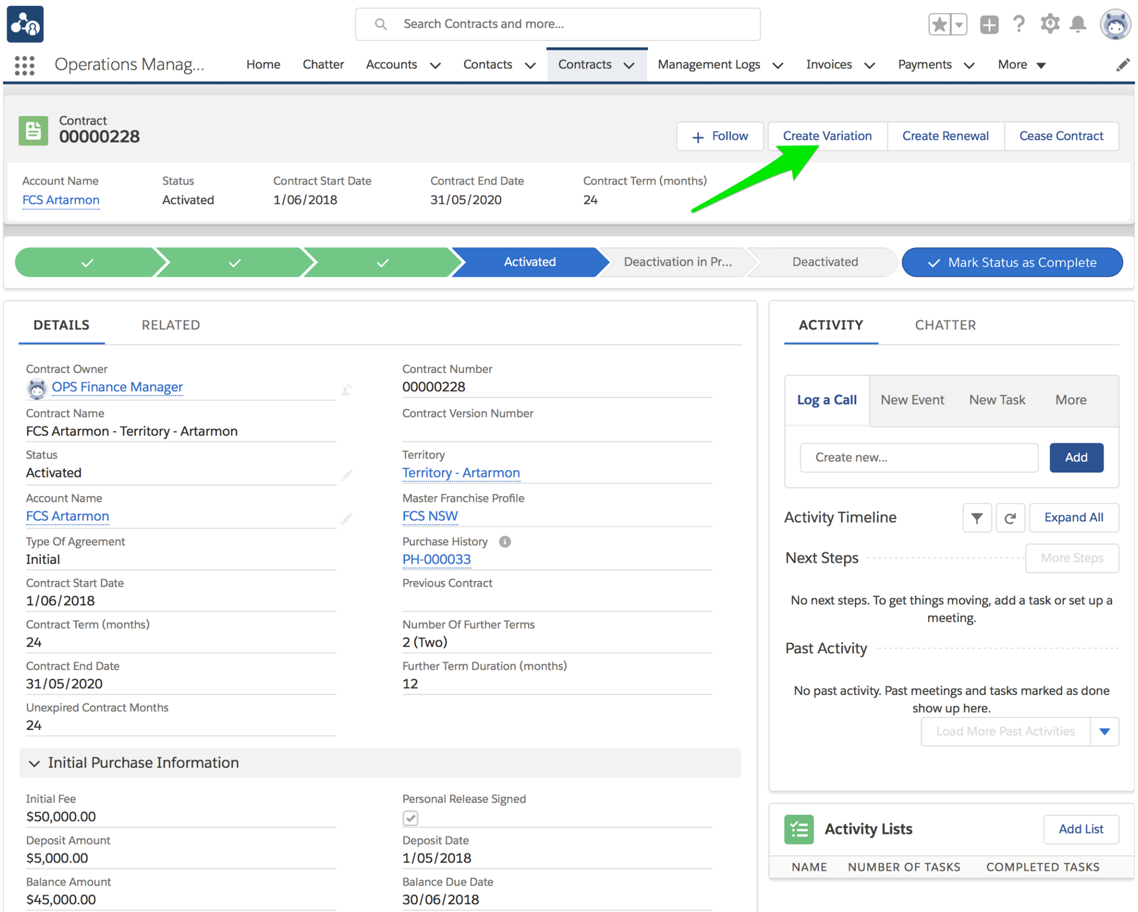
Once the contract has been signed, making changes to any of the key fields requires a contract variation. The contract variation is required in order to enable you to track any changes to the contract over time.

Changes to any of the following fields require a contract variation:

» `Account Id`
» `Billing Address`
» `Commencement Date`
» `Company Number`
» `Contract Record Type`
» `Contract Term`
» `Deposit Amount`
» `Full Contract Number`
» `Further Term Duration`
» `Initial Fee`
» `Legal Entity Name`
» `Master Franchise Profile`
» `Number Of Further Terms`
» `Operating Structure`
» `Start Date`
» `Territory`
» `Trading Name`

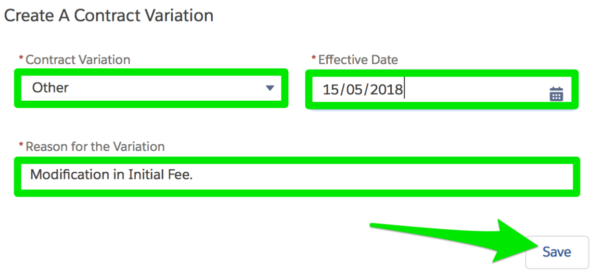
To vary a contract

1. From the **Contract**, press **Create Variation**.

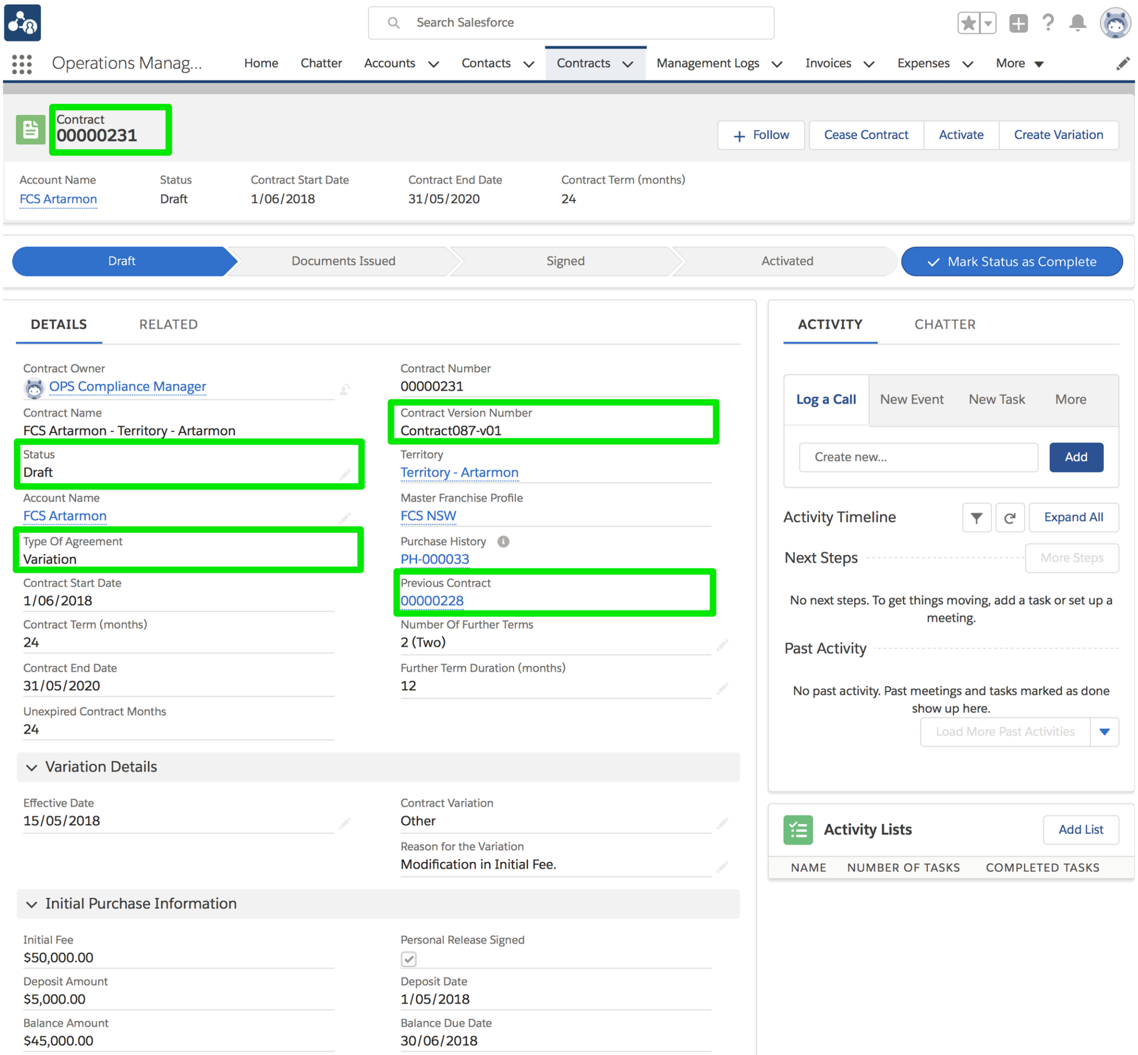


The **Create A Contract Variation** dialog box appears.

2. Enter the `Contract Variation` reason and `Effective Date`, then press **Save**.



The new contract version displays. It is given a new `Contract Number` and `Contract Version Number`. The contract itself is set to Draft so that it can be re-issued, signed and activated.



> You can now make the necessary changes to the contract preceding the issuing of the documents.

To activate the contract variation

1. When the contract is in *Draft* status, make any necessary changes to the contract.
2. Issue the document by pressing **Mark Status as Complete**.

   The contract is in *Documents Issued* status.
3. Now press the **Activate** button.

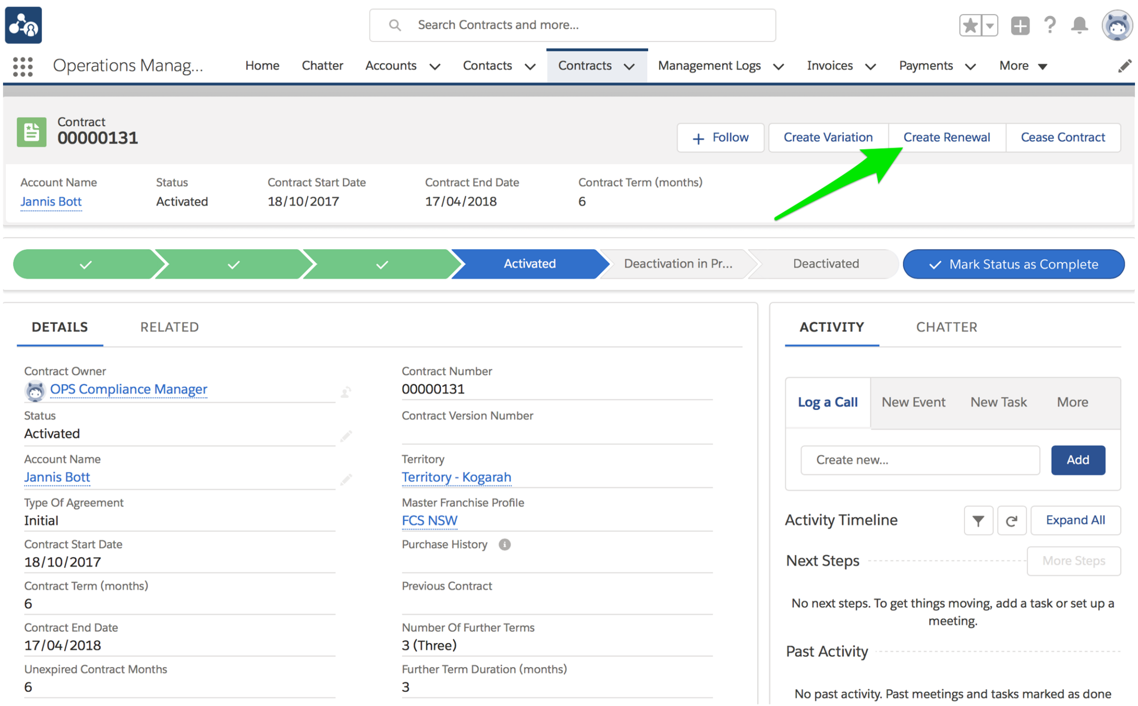
   This version of the contract is now *Activated* and the previous contract version is *Deactivated*.

How to renew a contract

Renewing a contract replicates the current contract (with new dates and decremented further terms) into a new contract. When you activate the renewal contract, the existing contract is deactivated.

To renew the contract

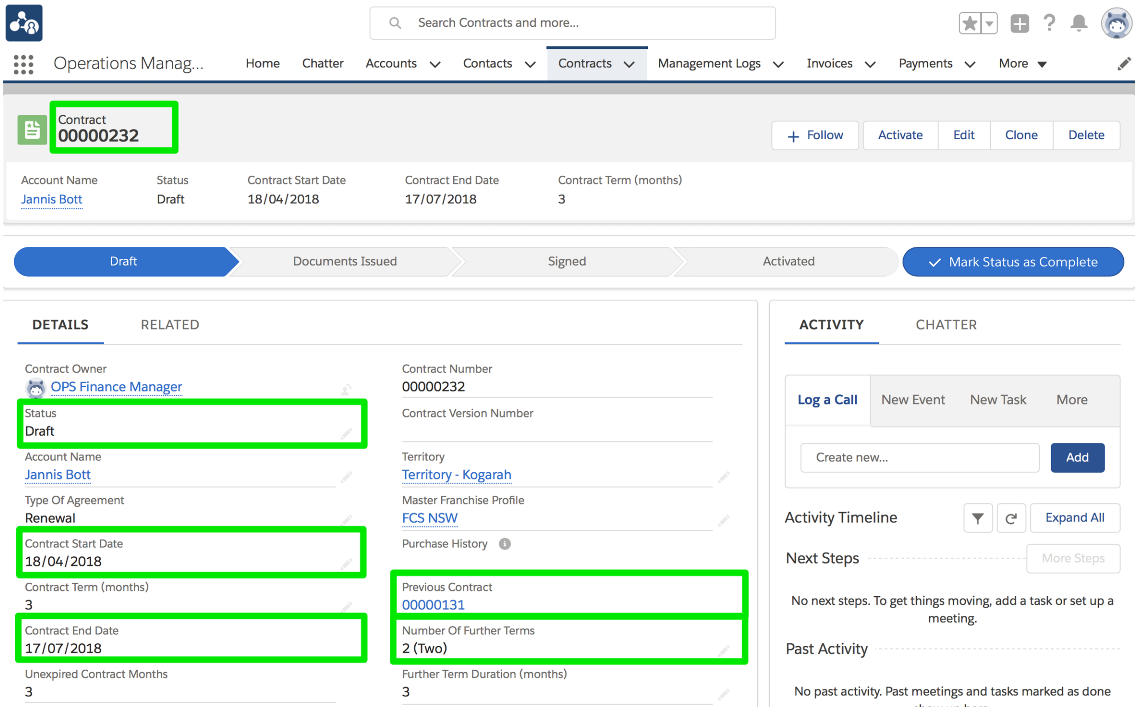
1. From the **Contract**, press **Create Renewal**.



The **Create a renewal contract** dialog box displays.

2. Press **OK**.

The renewal contract is displayed.



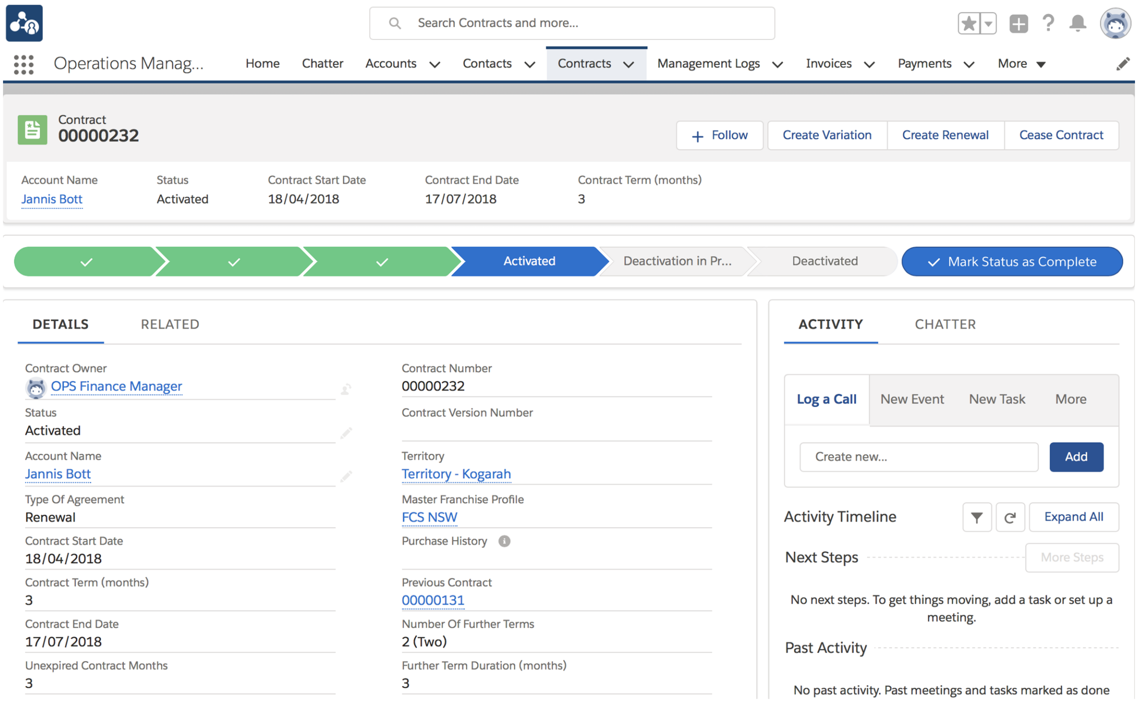
Note the changes made to this contract.

To activate the renewal contract

1. Press the **Activate** button.

   The **Confirm Activation** dialog box appears.

2. Press **OK**.

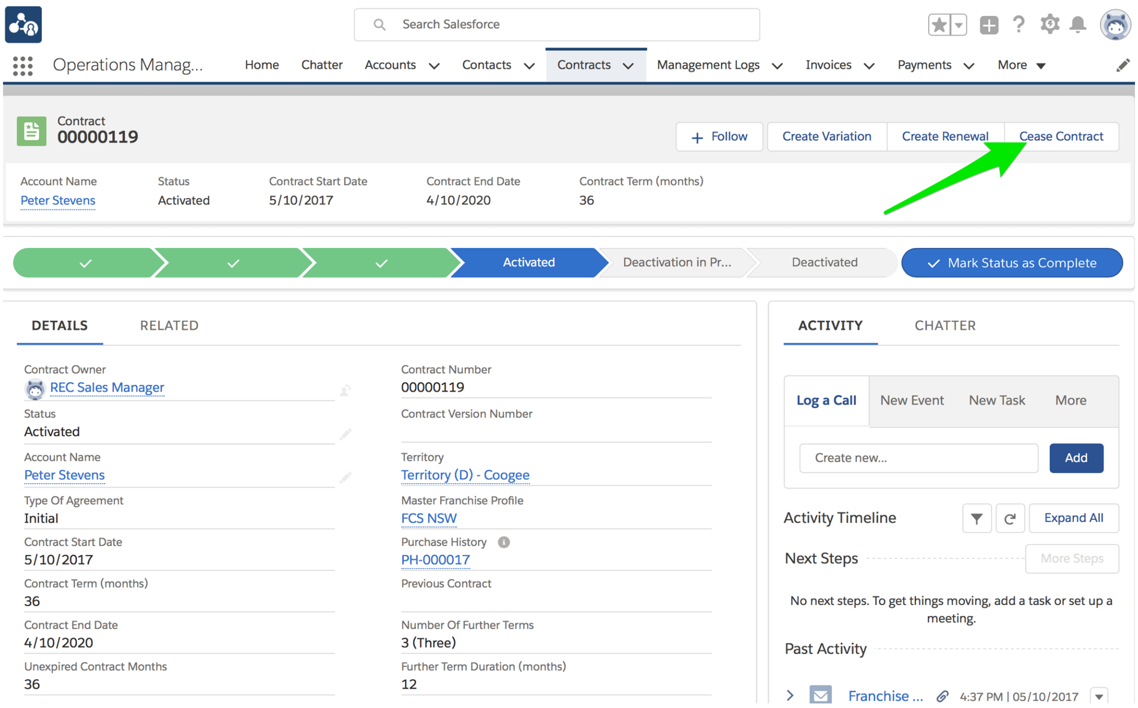


> The renewal contract is now `Activated` and the previous contract `Deactivated`.

How to cease a contract

To cease a contract

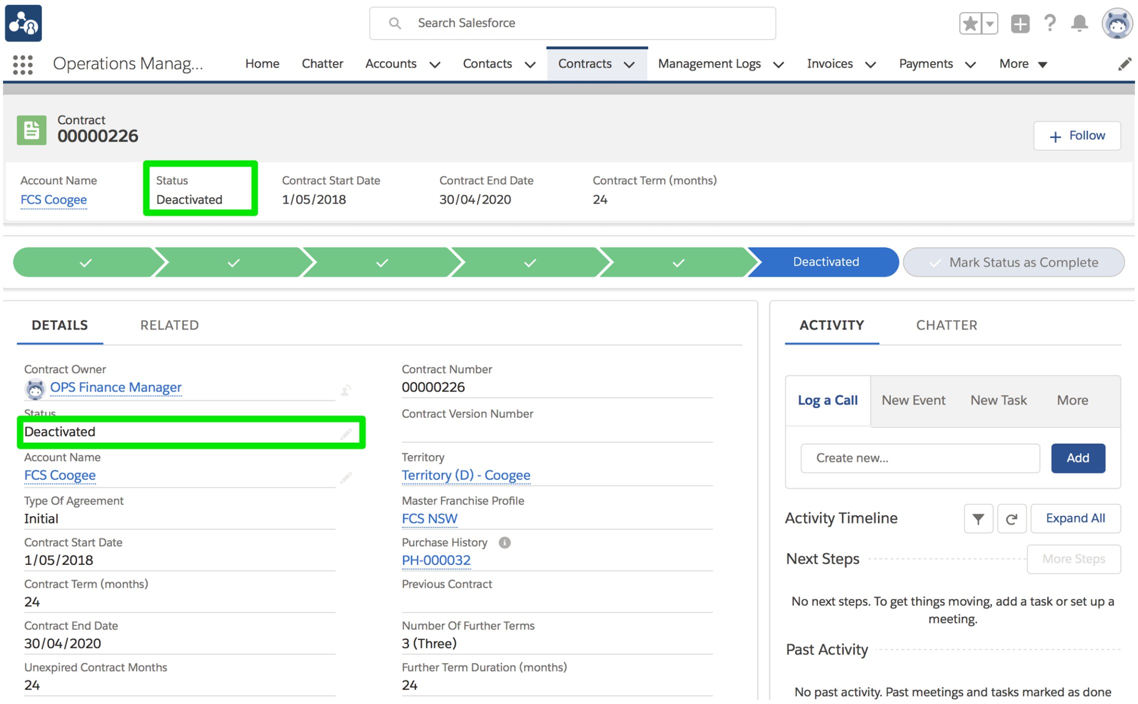
1. From **Contract**, press **Cease Contract**.



The **Cease Contract** dialog box appears.

2. Enter **Cessation Reason** and **Cessation Date**.

The **Contract** is now `Deactivated`.



The **Contract Cessation** function also places `End Dates` on **Fees** attached to the **Contract**.

How to generate contract documents

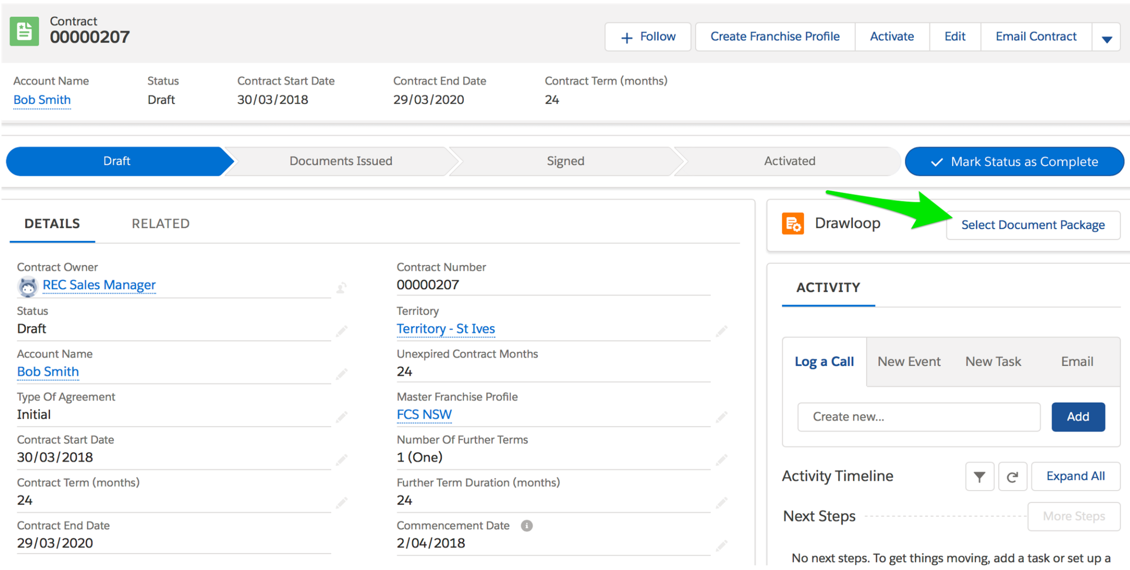
When you are satisfied that all relevant information has been entered on the **Contract** record, you can start the document generation.

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

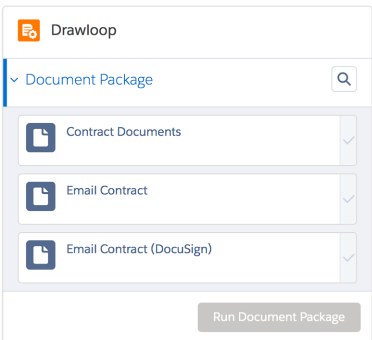
You may have more than one document package available. Ensure you know which document package you need to use.

To start document generation

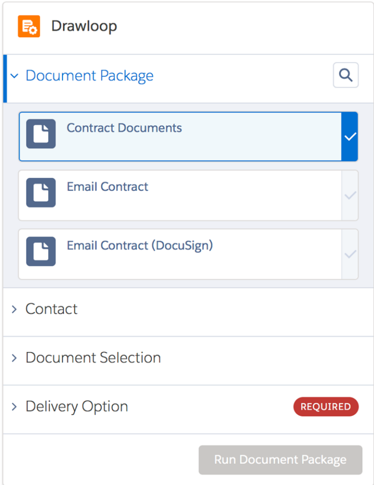
1. From the **Contract**, press **Select Document Package**.



One or more **Document Packages** appear.

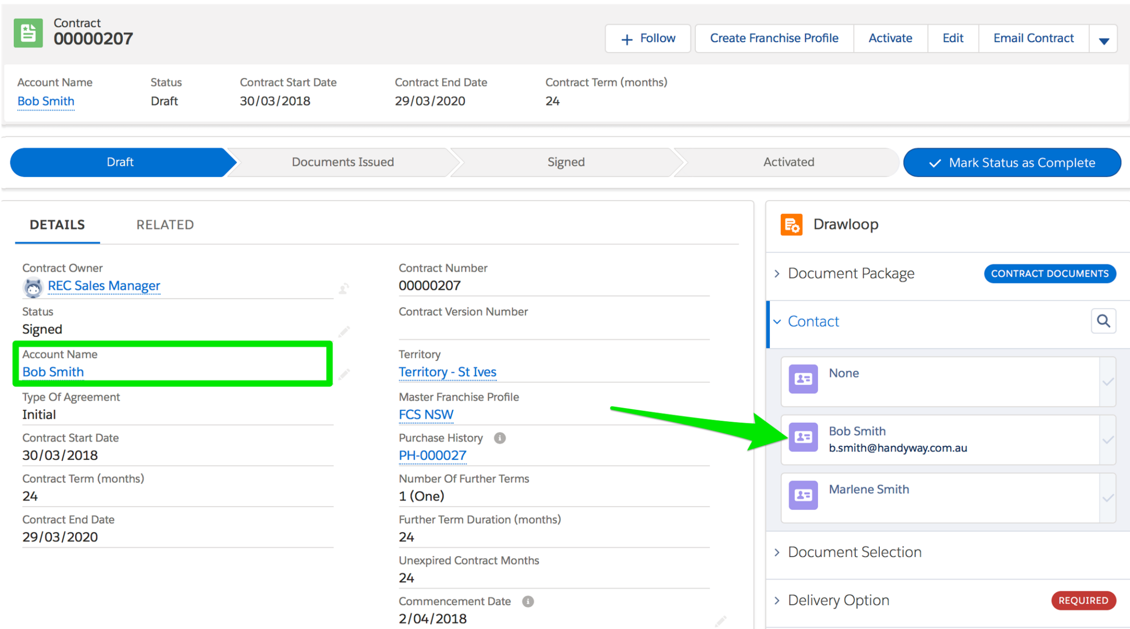


2. Select the **Document Package** you need to generate.

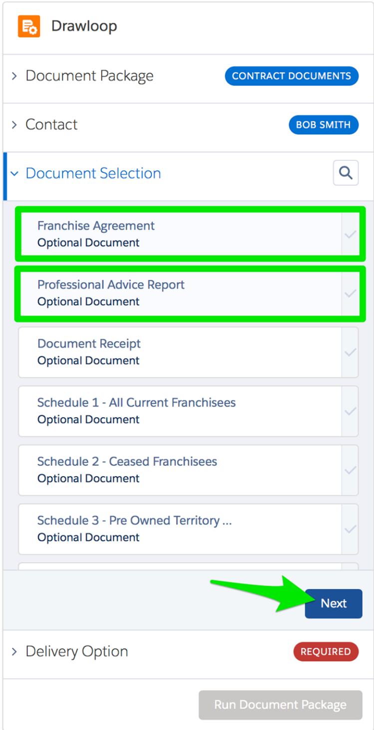


Once you have clicked on the document package, the **Contact** pane opens revealing a list of contacts.

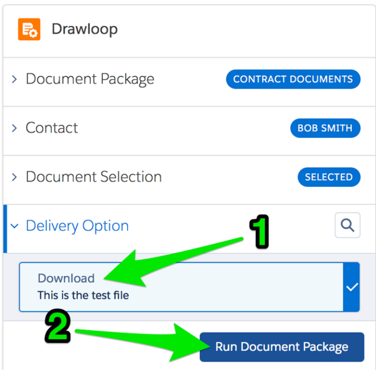
3. Select the **Contact** matching the person appearing in the `Account Name` **field.**



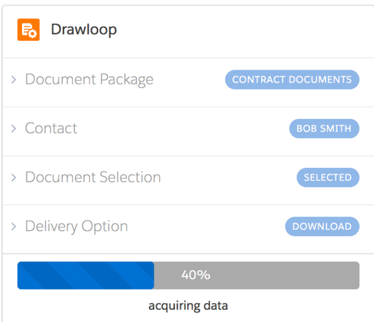
4. Select each document you need to generate, then press **Next**.



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

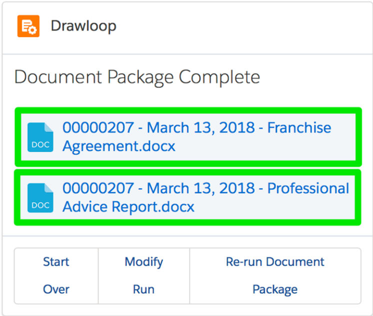


The document package shows a progress bar as it generates the documents.



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

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



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

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

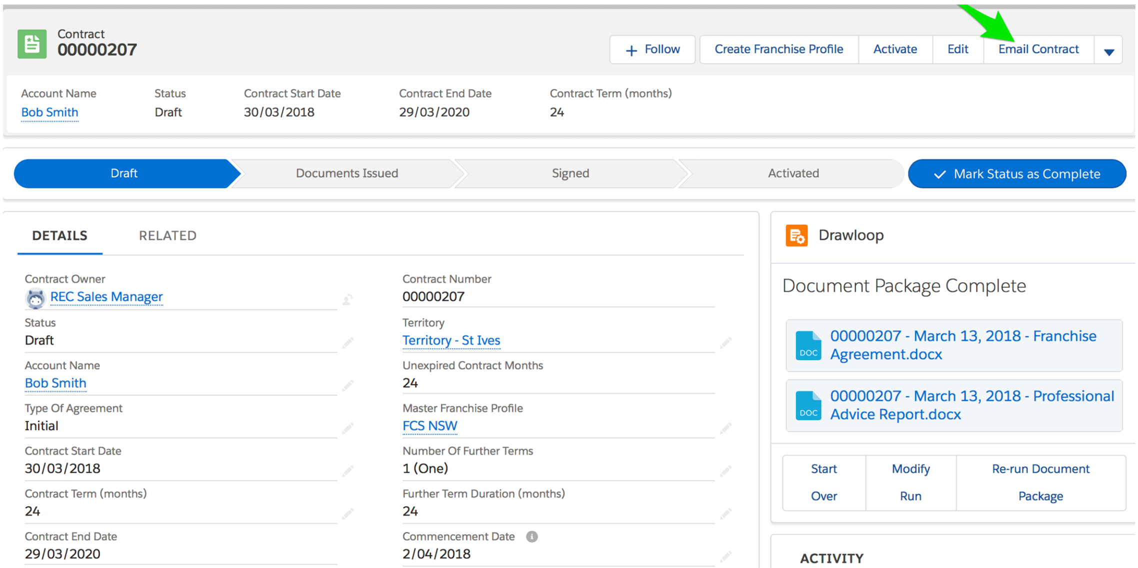
> If you need to edit the contract documents manually, you can make the changes to the downloaded documents and then upload the final contract documents to the Contract record using the standard Salesforce file upload functionality on the **Related** tab.

How to issue contract documents

Contract documents can be issued via email or manually.

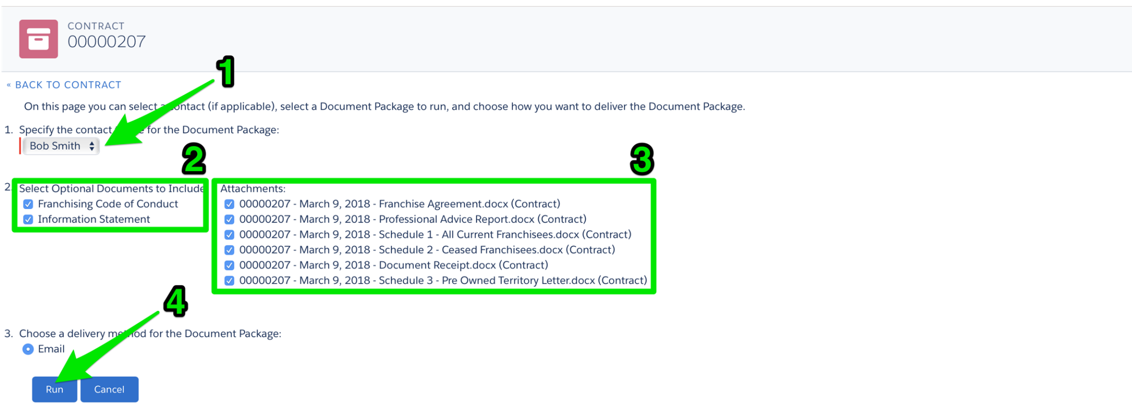
To issue documents via email

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



An email details page appears.

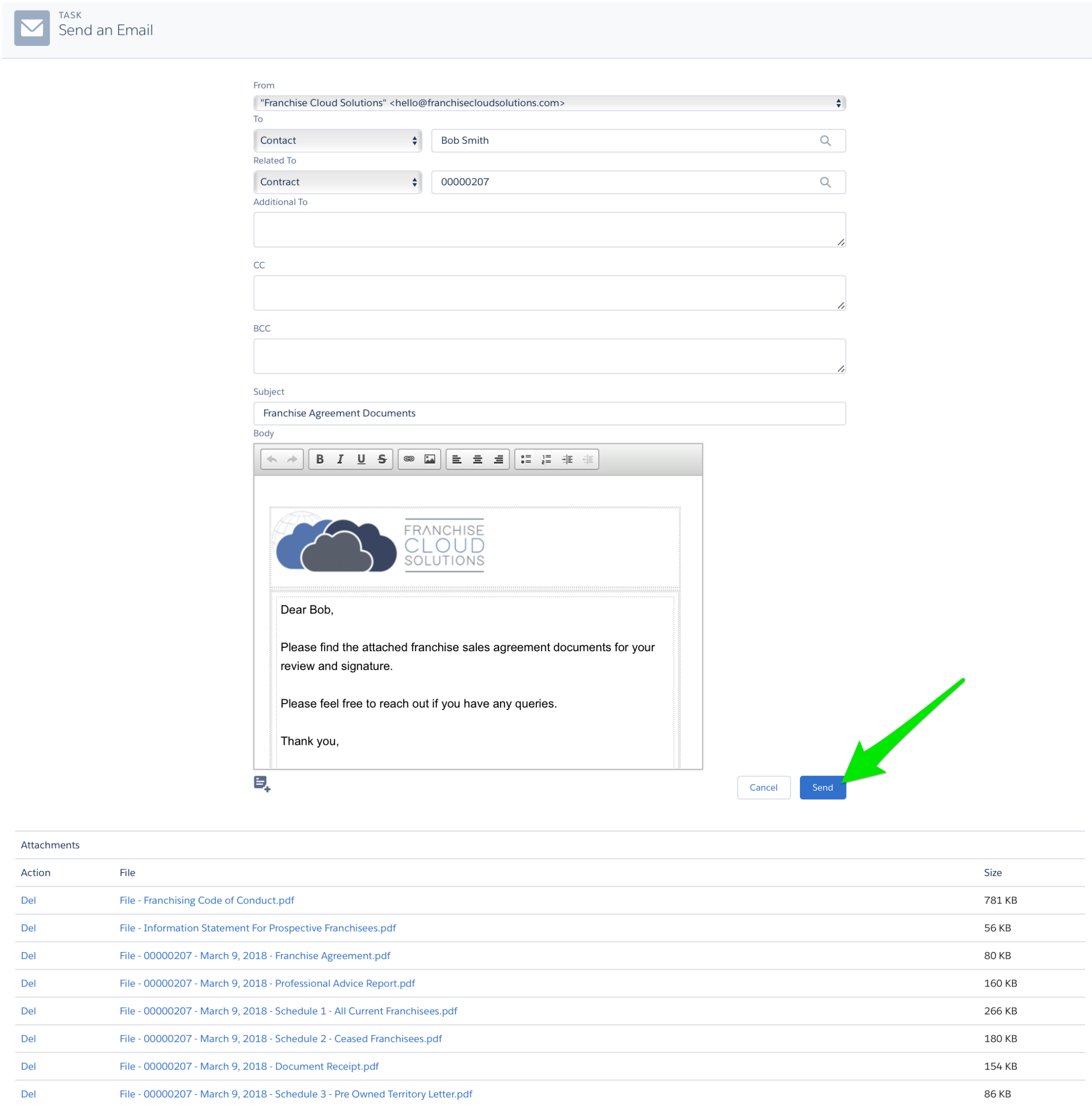
2. Select the recipient `Contact`, the `Optional Documents` and the relevant `Attachments`, then press **Run**.



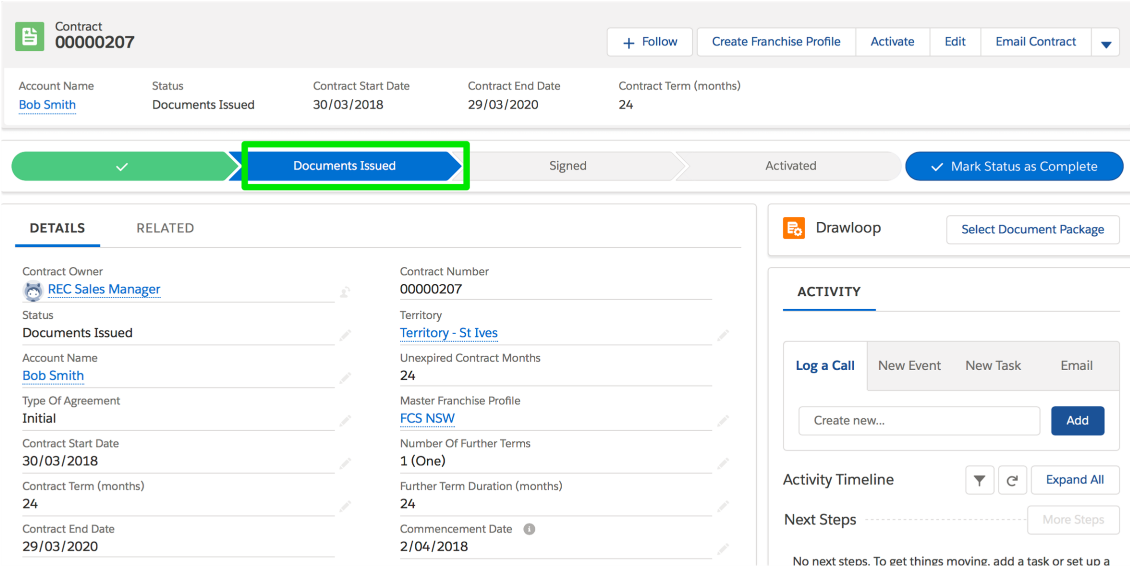
The system mail merges the documents, converts them to PDF, and then presents you with a **Send an Email** page.

> Attachments can include documents you have edited outside the system and uploaded to Salesforce via the **Contract Related** tab's **Notes and Attachments** field.

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



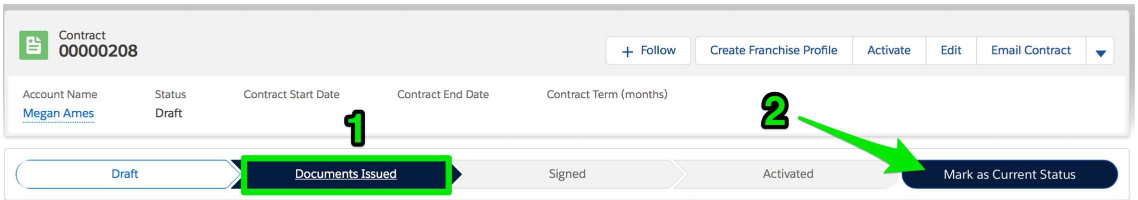
4. The system automatically advances to the **Documents Issued** status and sets the `Documents Issued` date.



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

To issue documents manually

1. Download the documents (*See* “How to generate contract documents” on page 65) then issue them outside the system.
2. Advance the contract to the `Documents Issued` stage. Select **Documents Issued** then press **Mark as Current Stage**.



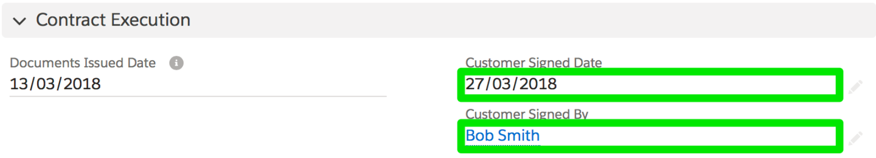
How to sign issued contract documents

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

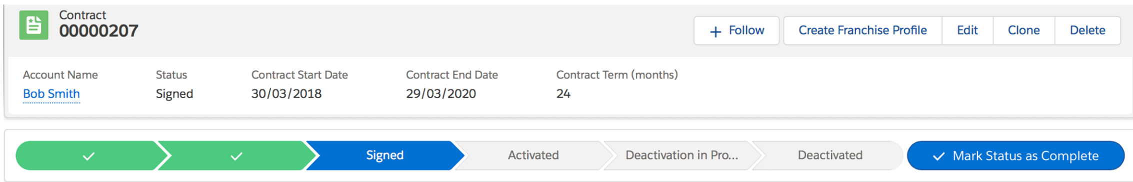
> In compliance with the Australian Competition & Consumer Commission Franchising Code of Conduct, there must be fourteen days between the `Documents Issued Date` and the `Customer Signed Date`.

To sign the contract documents

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

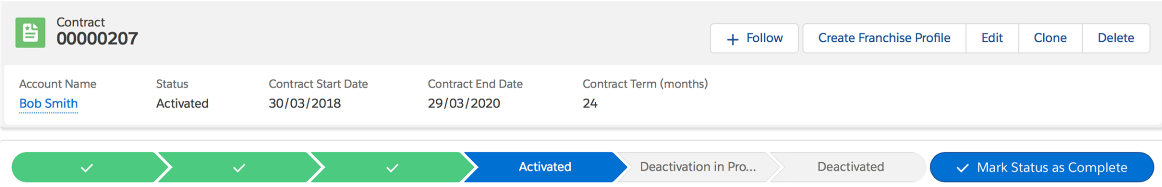


3. Press **Mark Status as Complete**. The Contract advances to the *`Signed`* status.



How to activate a contract

When the contract has been signed and has become effective, Operations Management will automatically move the **Contract** into the `Activated` status.



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

CHAPTER 3

Franchise Profile Accounts

Understanding franchise profile accounts

Franchise Profile Accounts represents the franchise operating entity. Settings on the Franchise Profile Account are used to control:

- Job Allocation
- Contact details
- Trading hours
- Defaults used on quotes and invoices

Beyond the franchise settings, the Franchise Profile Account ties together:

- the franchise owner
- the contract
- the territory
- the mastery territory to which this territory belongs

How Franchise Profile Accounts are created will depend on what software options your business has licensed and how you are currently using Operations Management.

- If you have licensed Franchise Cloud Solutions Franchise Recruitment, Franchise Profile Accounts will be created using Franchise Recruitment and migrated to Operations Management.
- If you have licensed Operations Management alone and you are entering Franchise Profile Accounts for new franchisees, you will want to create a Contract and then generate the Franchise Profile Account. *See* "To create a Franchise Profile Account" on the next page.

Visibility of the franchise profile account

The Franchise Profile Account (together with Jobs, Accounts, Contacts, Territories and Territory Locations) is shared between the franchisor and the franchisee. Any information stored on, or attached to, the Franchise Profile Account is visible to the franchisee.

When franchisors wish to record private information relating to a franchisee, a Management Log must be used. *See* "Understanding management logs" on page 176.

Franchise setup

Franchise Profile Accounts contain a wide range of information. Some of this information is known during the sale of a franchise. Other elements may only be known shortly before the franchisee begins trading.

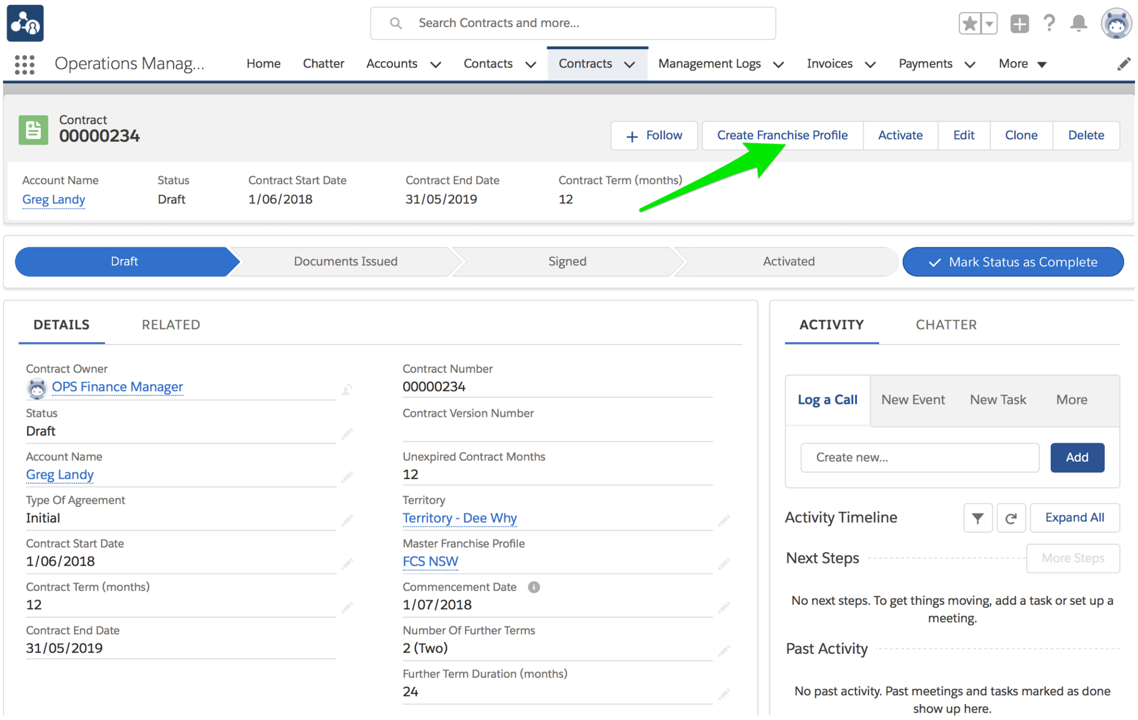
When you first create the Franchise Profile Account, you may wish to enter only basic information. You can add details over time.

How to create a franchise profile account

The best way to create a Franchise Profile Account is by generating one from a Contract. When the Contract is set up, the Franchise Profile Account can then be generated from the information already contained in the Contract.

To create a Franchise Profile Account

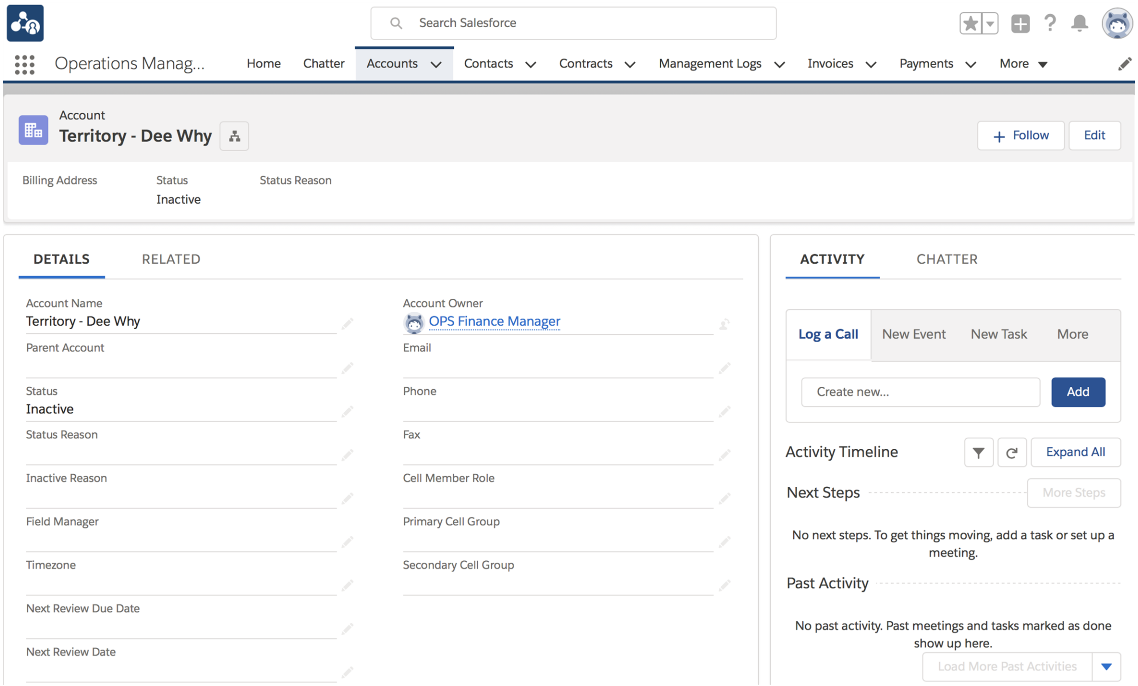
1. From the Contract, press the **Create Franchise Profile** button.



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

2. Press **OK**.

   The new Franchise Profile Account appears. Information from the Contract has been copied across. You can edit it further to complete the information.

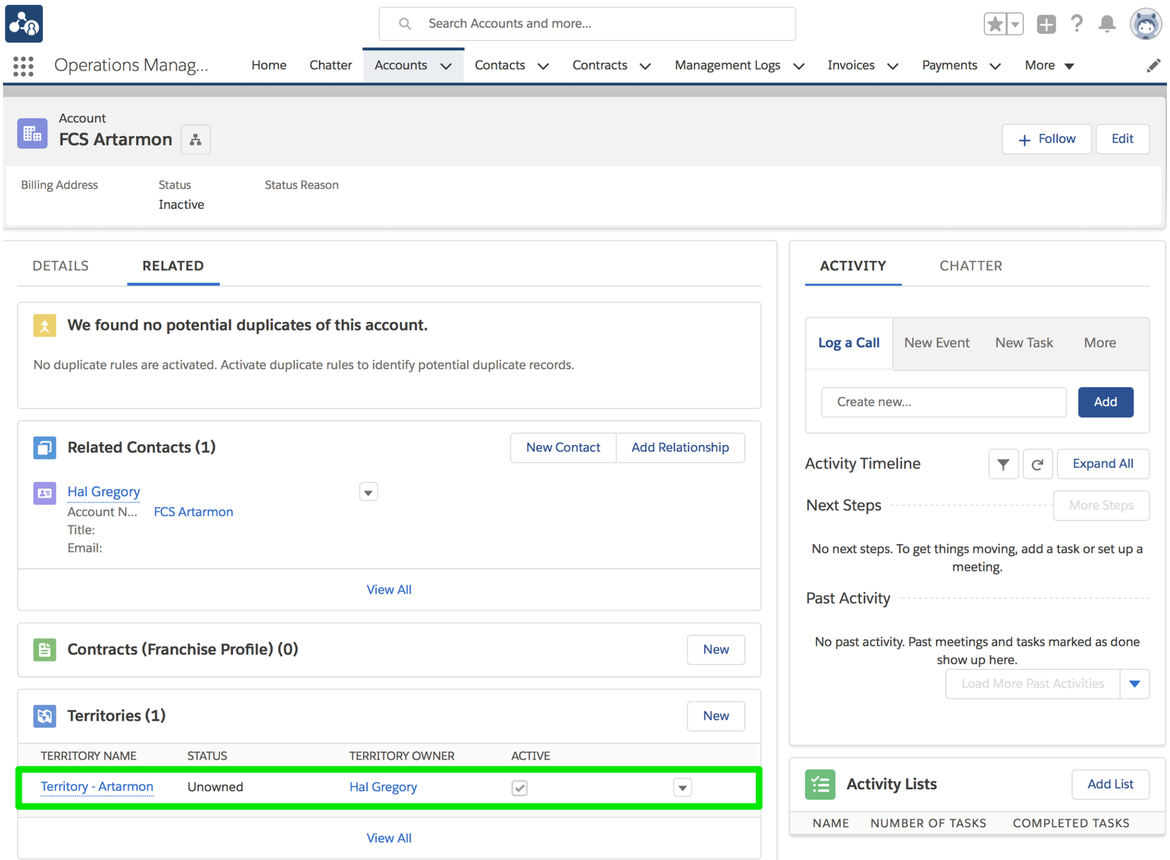


> Note that you are the account owner and will remain the account owner until the franchisee obtains access to Business Management. When the franchisee obtains access to Business Management their user account will become the owner of this record.

How to add a territory

You need to link the Franchise Profile Account to a territory. This is performed from the Territory record.

Ask your system administrator to add the Franchise Profile Account and Account Owner to the Territory record. When that is done, the Territory will appear in the **Franchise Profile Account**'s **Related** tab.



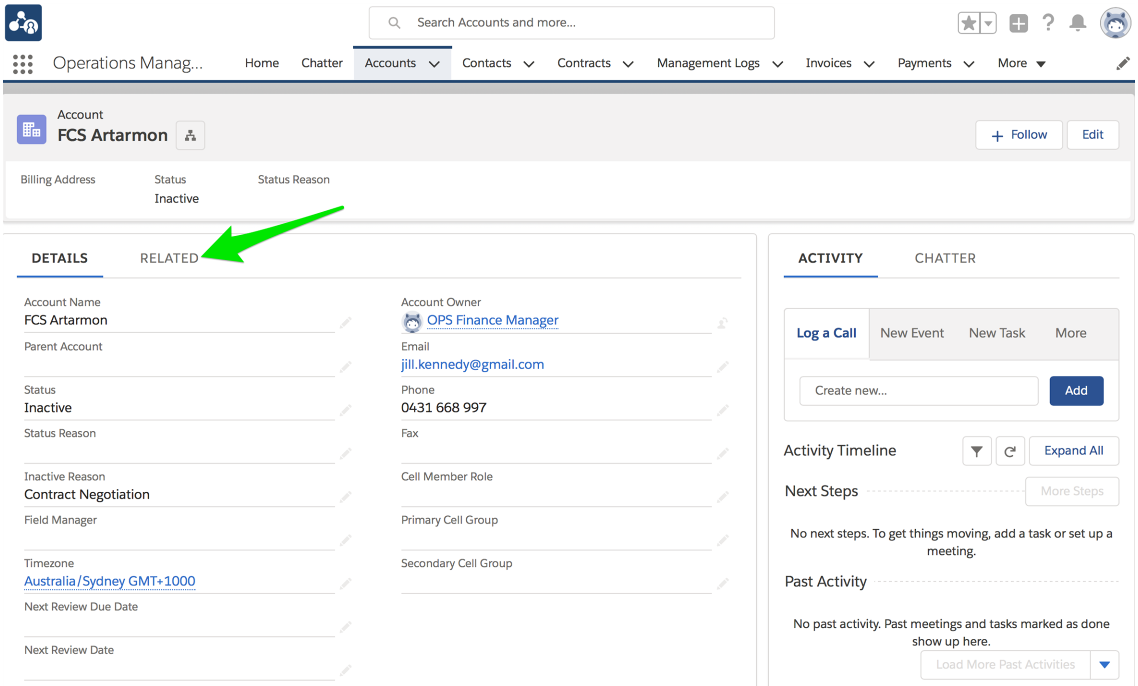
How to add a contact

When there are franchise contacts outside the franchisee, you will need to add them to the Franchise Profile Account.

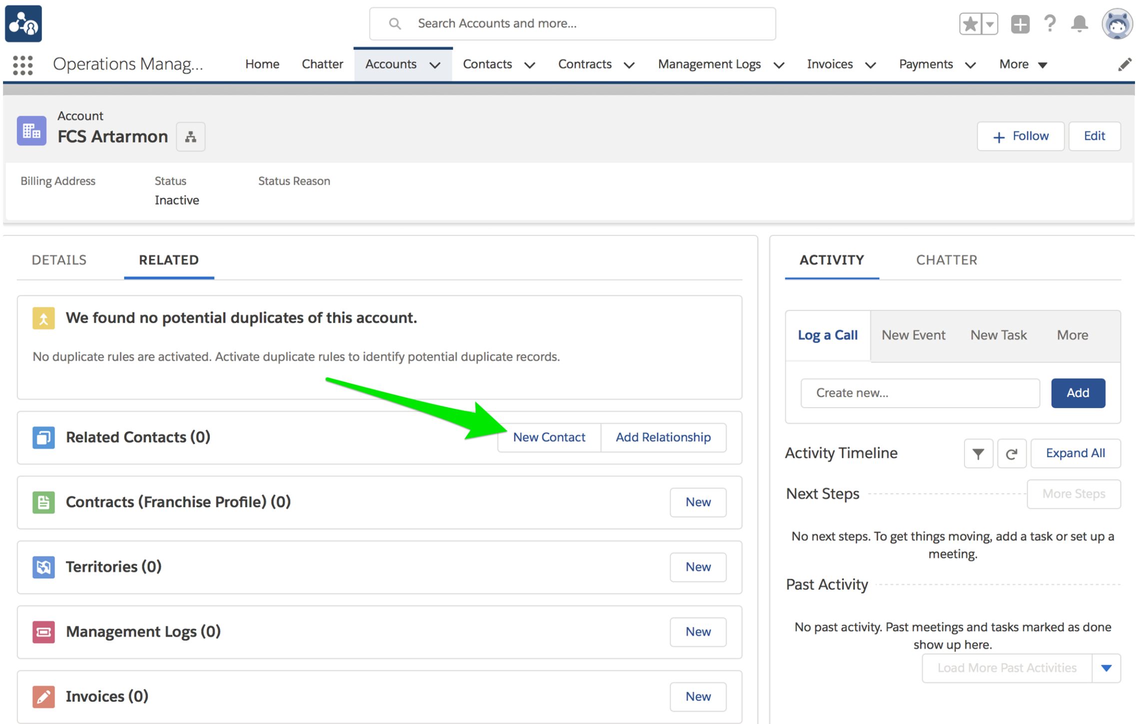
> Examples of other contacts include employees or contractors of the franchisee.

To add a contact to the Franchise Profile Account

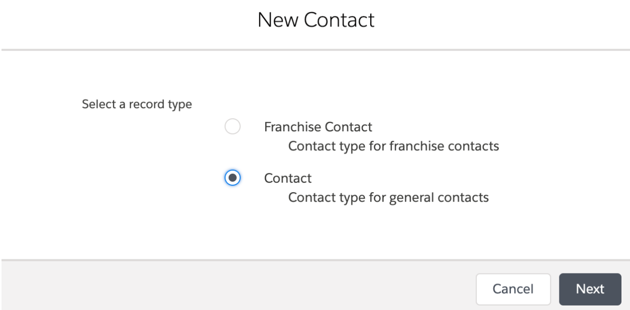
1. From the **Account**, select the **Related** tab.



2. From **Related Contacts**, press **New Contact**.



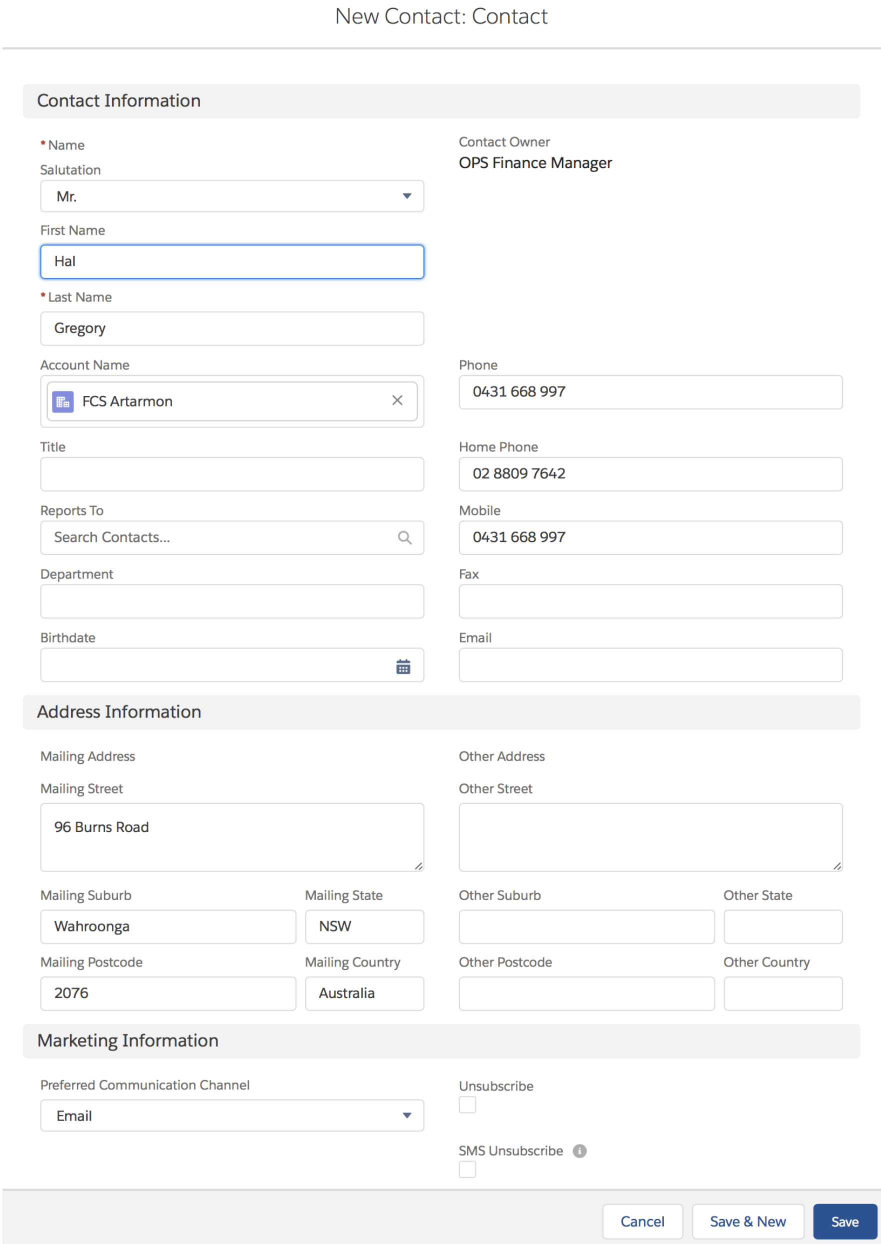
The **New Contact** dialog box appears.



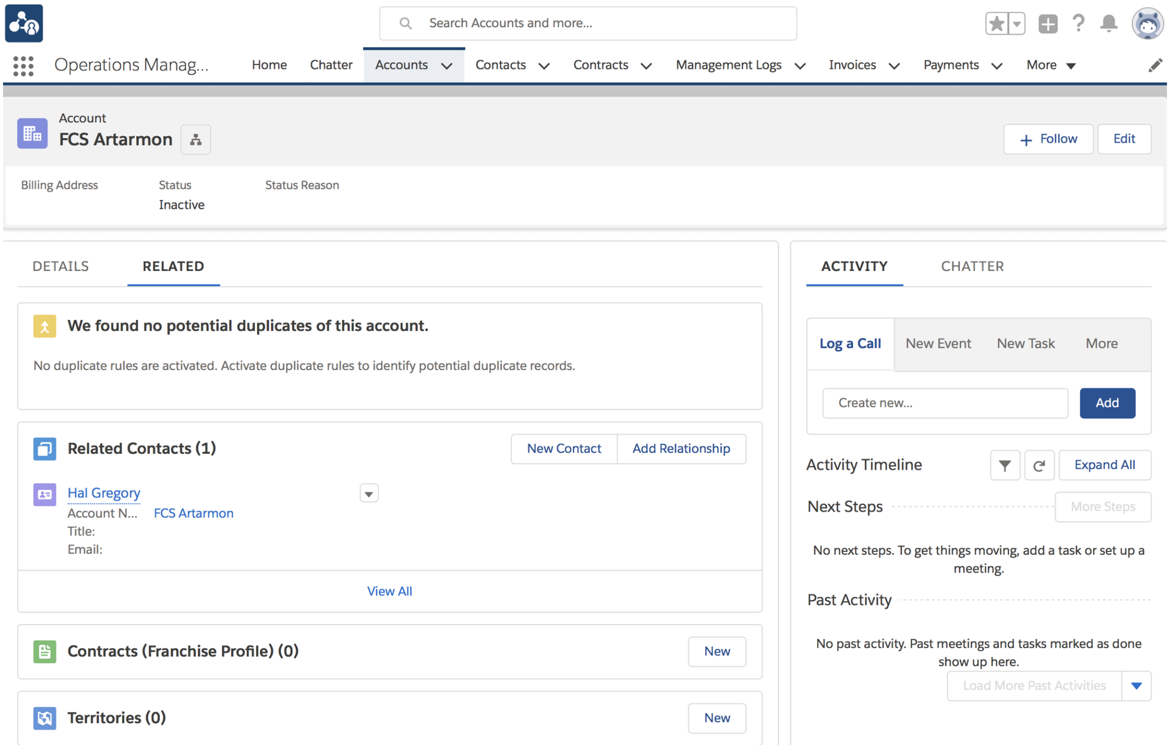
3. Choose `Franchise Contact` if the contact will be employed by the franchise. Otherwise choose the general `Contact` type. Press **Next**.

   The **New Contact** detail entry dialog box appears.

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



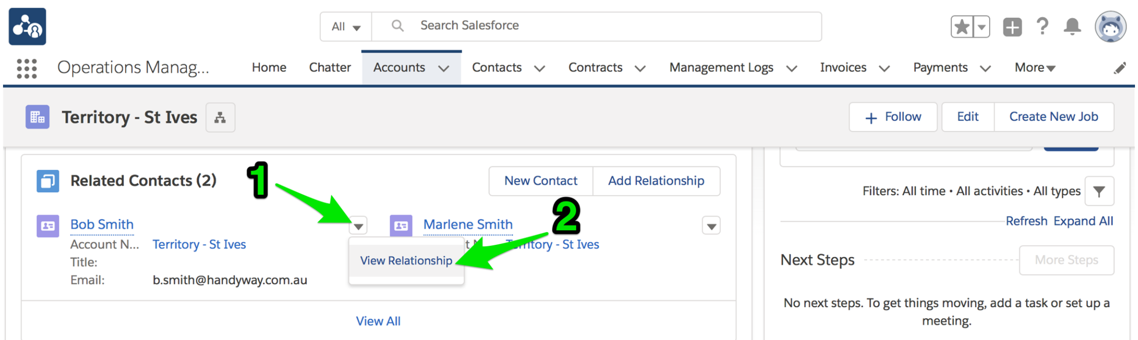
The new contact is now added to the account.



> Ensure the **Related Contact** representing the franchisee is set to the `Role` of *`Franchise Owner`*.

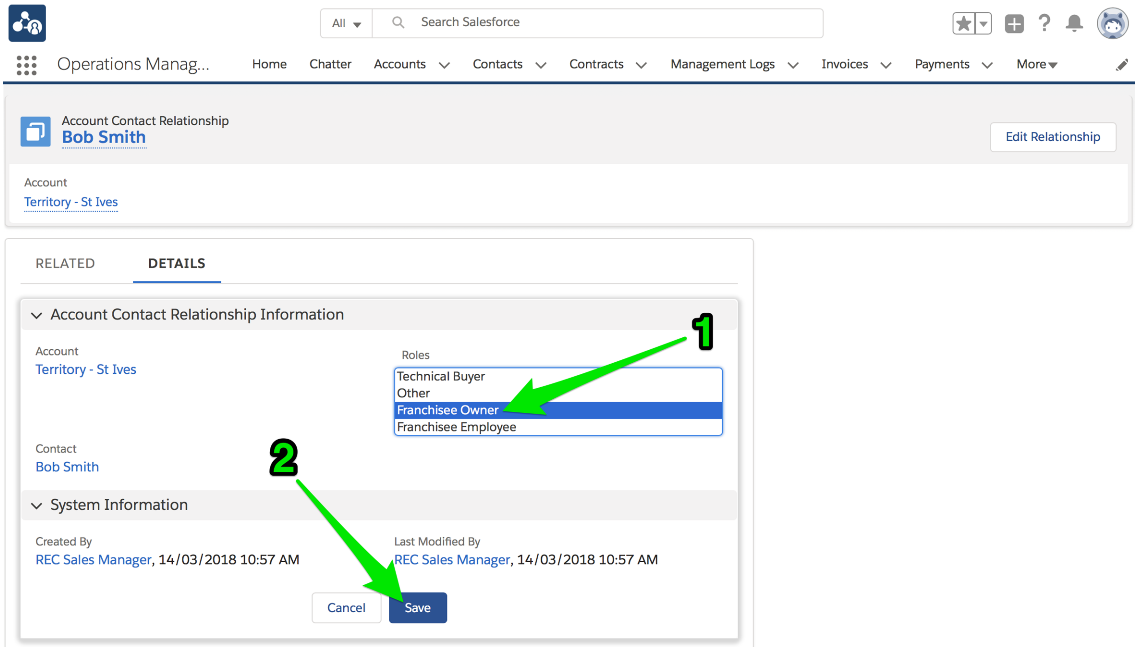
To specify the contact’s role

1. From Related Contacts, open **Show more** and select **View Relationship**.



The **Account Contact Relationship** page displays.

2. Click **Edit**, select the `Franchise Owner Role` then press **Save**.



Franchise commencement

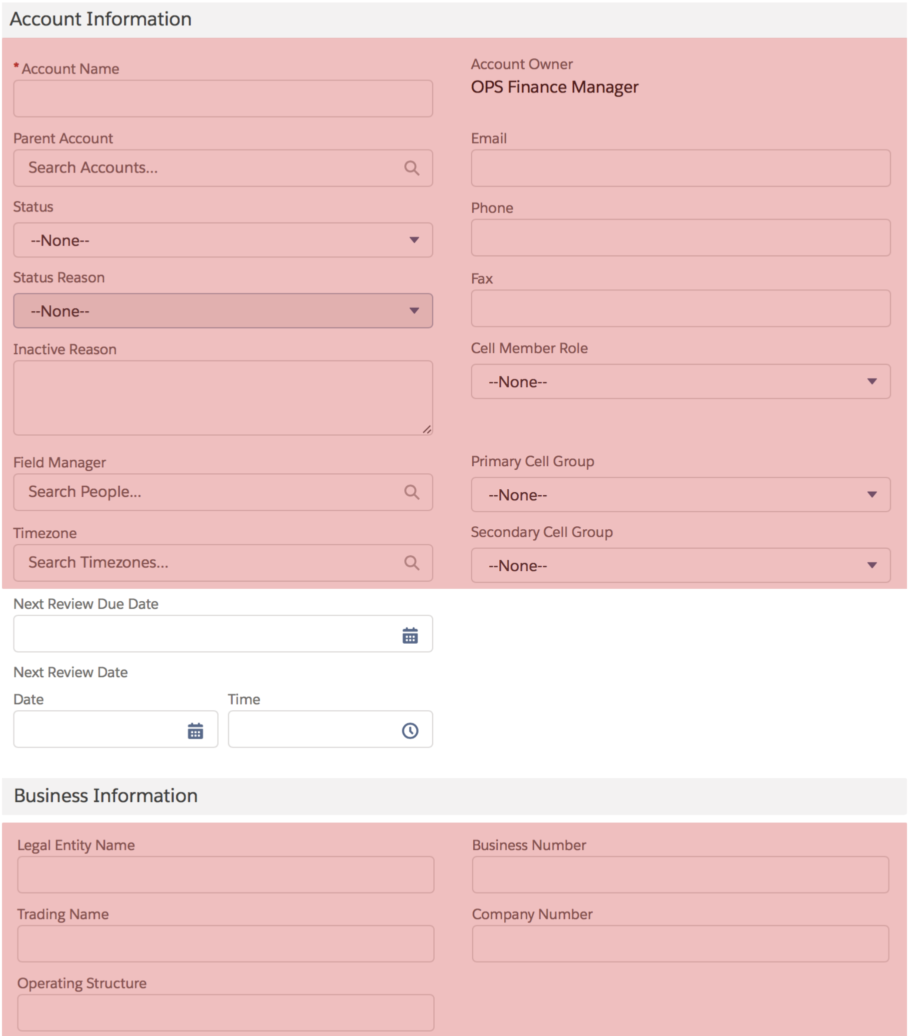
Prior to the franchisee gaining access to Business Management, you will want to ensure that all necessary information is entered onto their Franchise Profile Account.

Completing franchise information

Much of the information within a Franchise Profile Account can be seen by the franchisee. Much is editable by them, but not all. Here is a guide as to what is visible, and what the franchisee may edit.

Legend

- Visible to franchisee
- Visible and editable



Address Information

Billing Address

Billing Street

Billing Suburb

Billing State

Billing Postcode

Billing Country

Shipping Address

Shipping Street

Shipping Suburb

Shipping State

Shipping Postcode

Shipping Country

Invoice Summary Information

Tax Exempt

Total Invoice Amount

Amount Paid

Amount Outstanding

Credit Balance

Has Overdue Balance

Overdue Balance

Debtors 0-15 days

Debtors 16-30 days

Debtors 31-45 days

Debtors 46+ days

Accounts Receivable Notes

Quote & Invoice Information

Payment Terms

On Completion

Default Tax Rate

Accounting Sequence Name

Default Markup %

Default Hourly Rate

Payment Method Information

Cash

Cheque

Credit Card

Direct Deposit

Eftpos

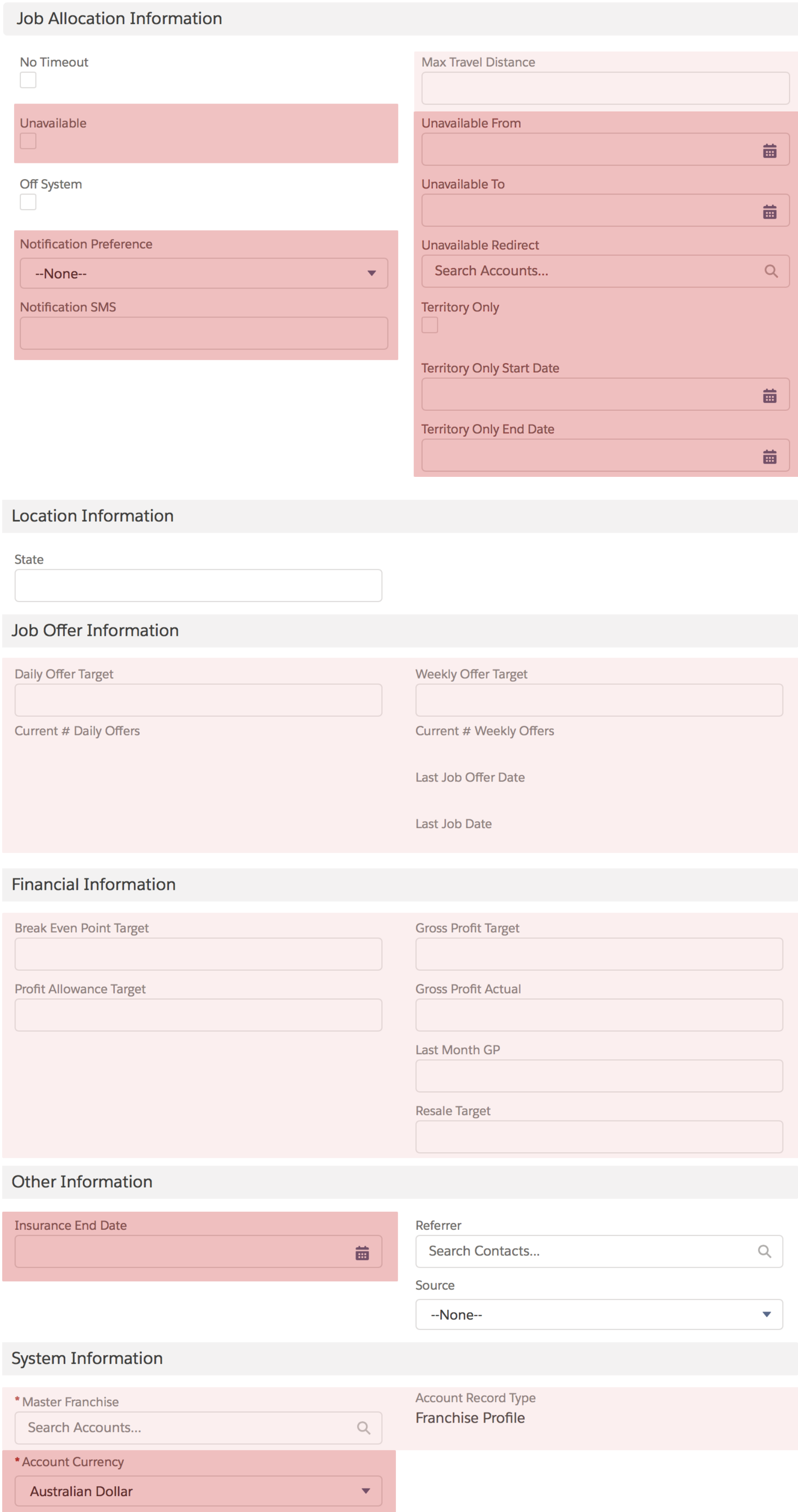
Bank Account Name

Bank Account BSB

Bank Account Number

Paypal

Paypal Email



Job Allocation Information

No Timeout

Max Travel Distance

Unavailable

Unavailable From

Off System

Unavailable To

Notification Preference

--None--

Unavailable Redirect

Search Accounts...

Notification SMS

Territory Only

Territory Only Start Date

Territory Only End Date

Location Information

State

Job Offer Information

Daily Offer Target

Weekly Offer Target

Current # Daily Offers

Current # Weekly Offers

Last Job Offer Date

Last Job Date

Financial Information

Break Even Point Target

Gross Profit Target

Profit Allowance Target

Gross Profit Actual

Last Month GP

Resale Target

Other Information

Insurance End Date

Referrer

Search Contacts...

Source

--None--

System Information

* Master Franchise

Search Accounts...

Account Record Type

Franchise Profile

* Account Currency

Australian Dollar

How to configure a franchise for job allocation

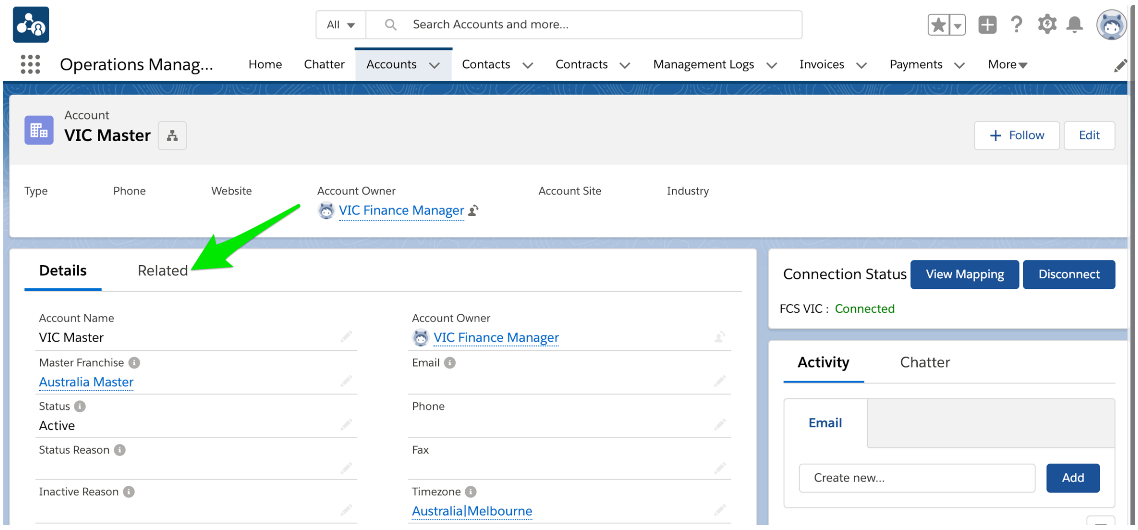
Configure the Franchise Profile Account with appropriate settings, based on your licensing options and the size and nature of the territory. *See* "How to configure a franchise profile for job allocation" on page 103.

How to add a company asset

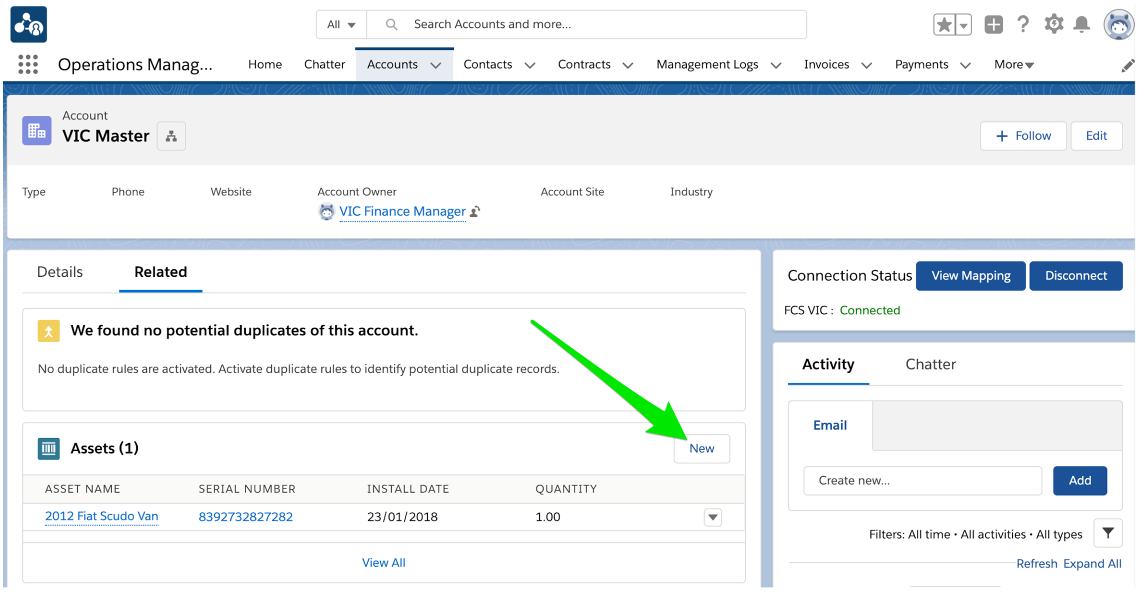
Company owned assets can be registered against the Master Franchise Profile Account.

To add an asset to the register

1. From the Franchise Profile Account, select **Related**.

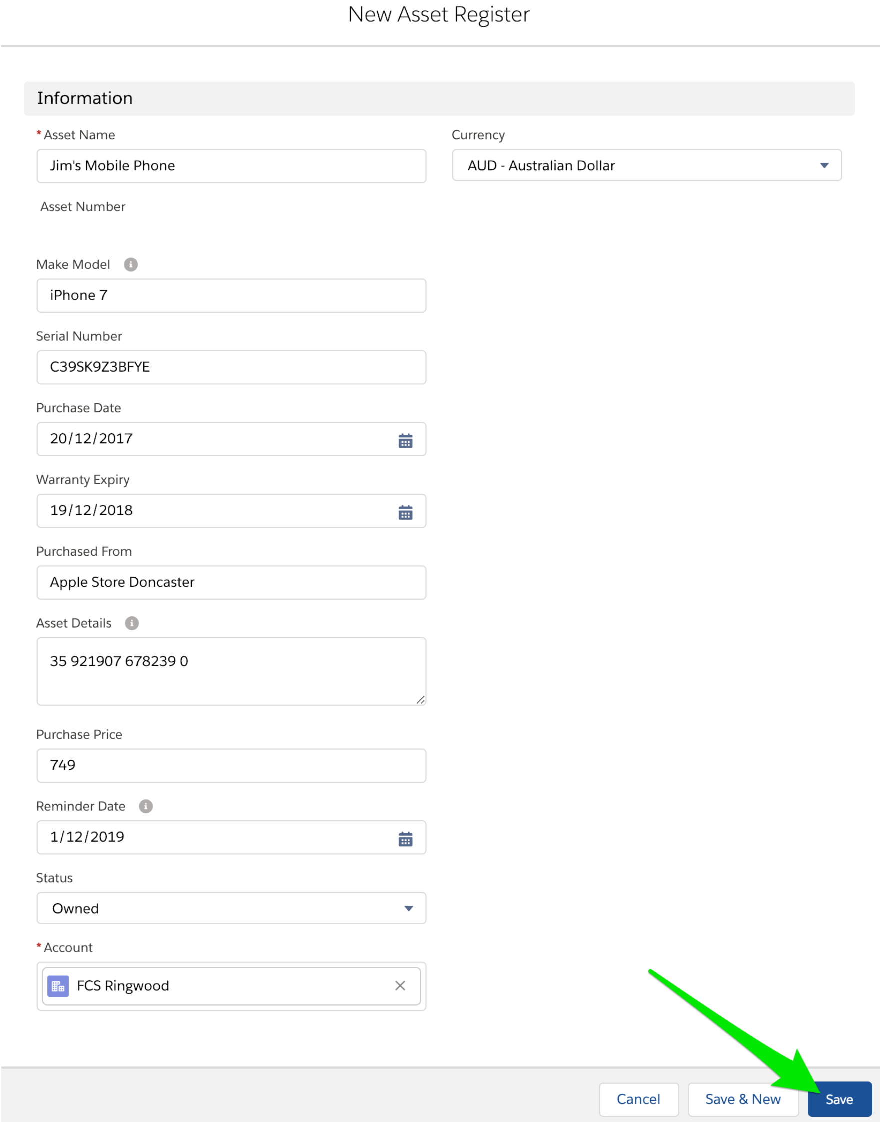


2. On the **Related** tab, locate the **Assets Register** and press **New**.

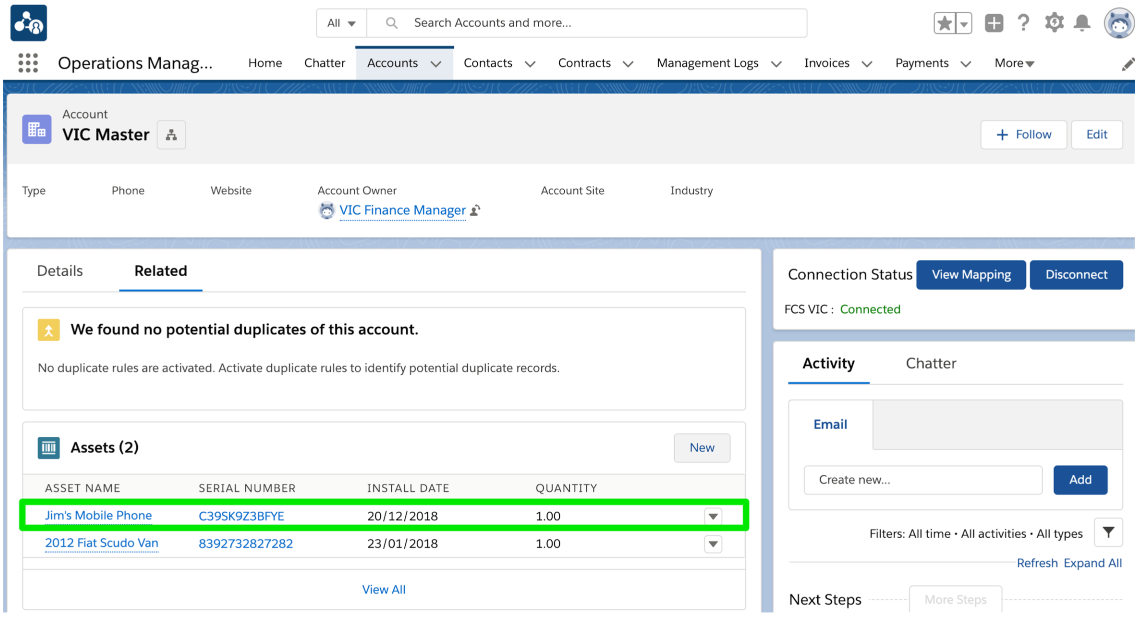


The **New Asset Register** dialog box appears.

3. Complete the details for the new asset then press **Save**.



4. The new asset is now added to the register.



If you insert a reminder date for an asset, you will receive an email on the reminder date notifying you to take action.

How to add an insurance policy

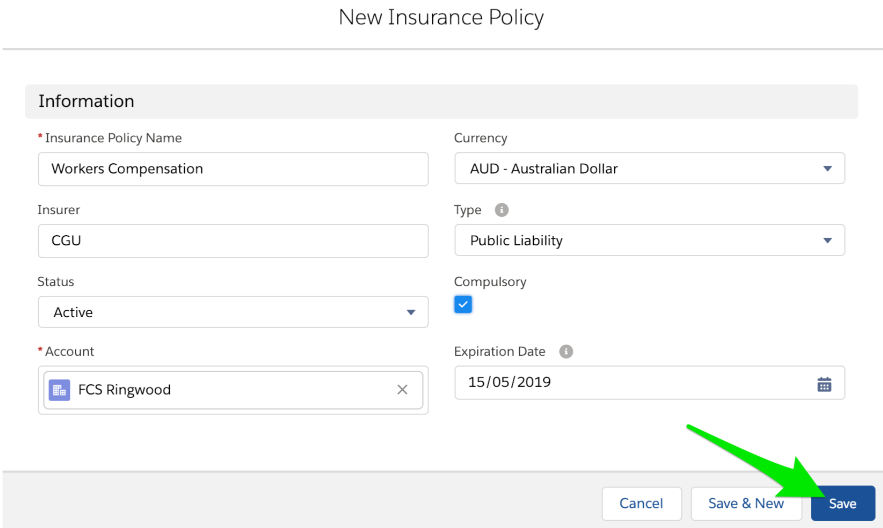
Insurance policies can be added to a list of policies held against the Master Franchise Profile Account.

To add an insurance policy

1. From the Master Franchise Profile Account, select **Related**.
2. On the **Related** tab, locate **Insurance Policies** and press **New**.

   The **New Insurance Policy** dialog box appears.

3. Complete the details for the new policy then press **Save**.



4. The new policy is now added to the list.

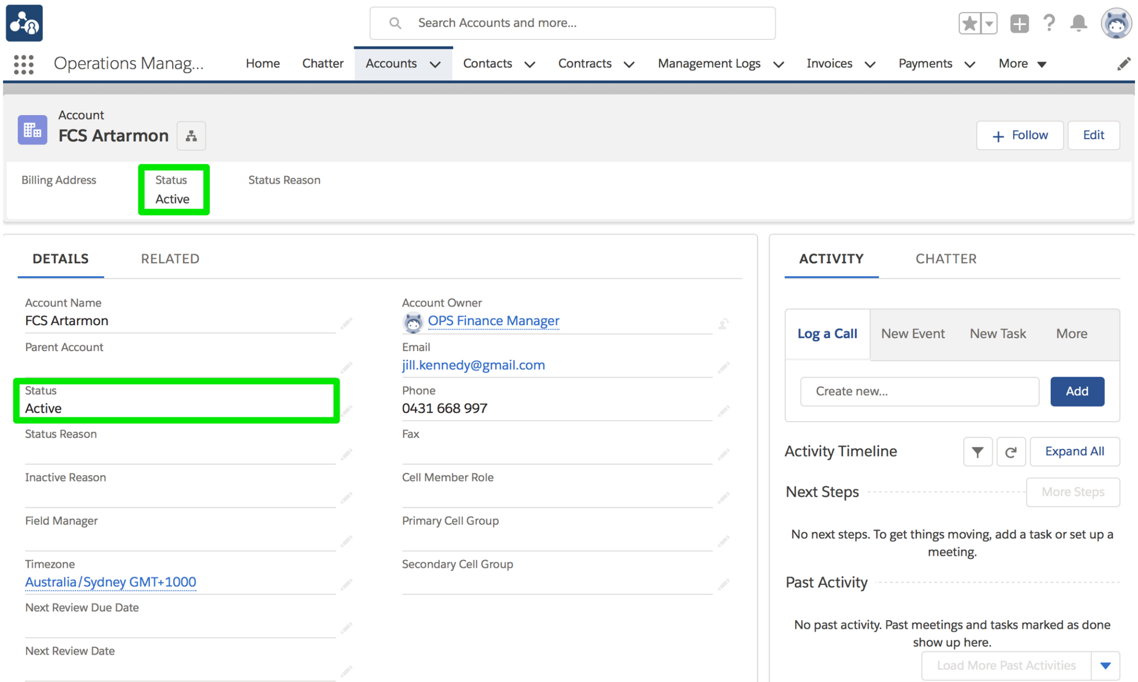
> Your will be sent an email 30 days prior to the expiry of each insurance policy reminding you to renew the policy.

Pre-commencement checklist

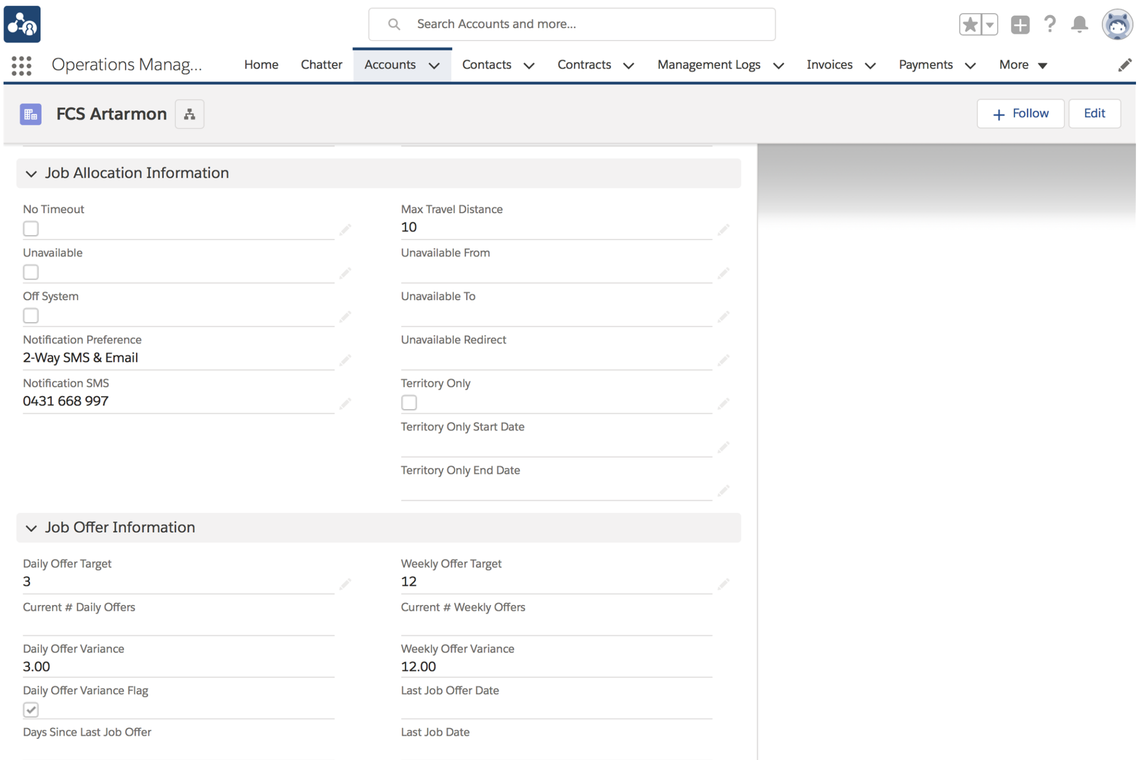
Before a new franchisee begins trading, you will want to check that everything is set up correctly.

To check the setup for a new franchisee

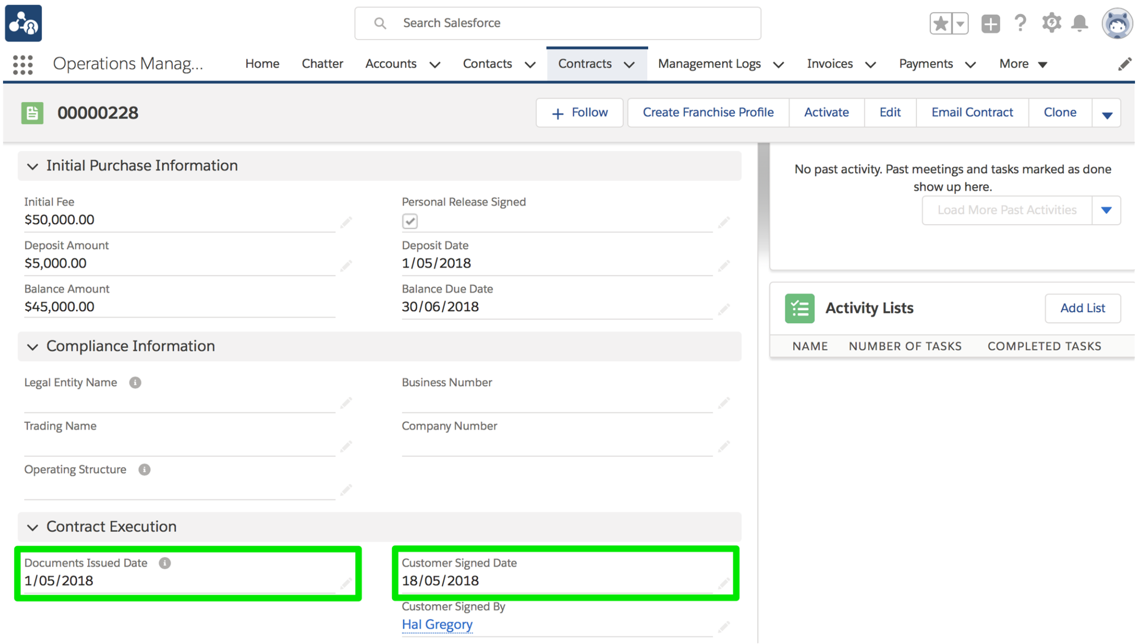
1. The **Franchise Profile Account** `Status` is *`Active`*.



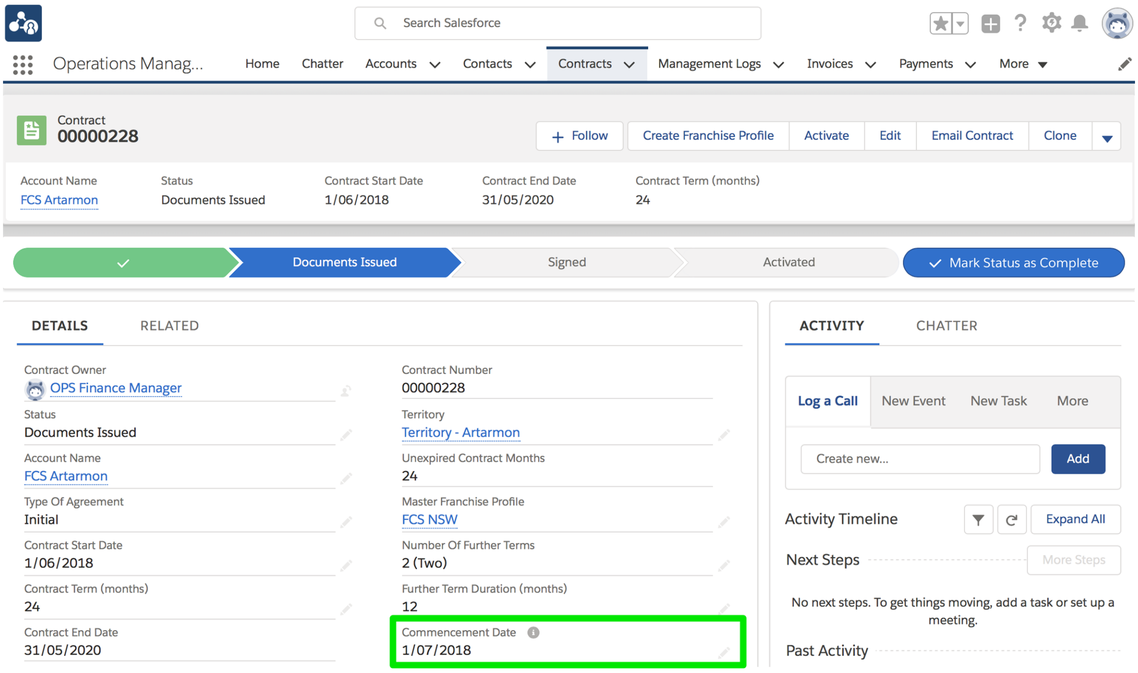
2. The **Franchise Profile Account** has its **Job Allocation Information** correctly configured.



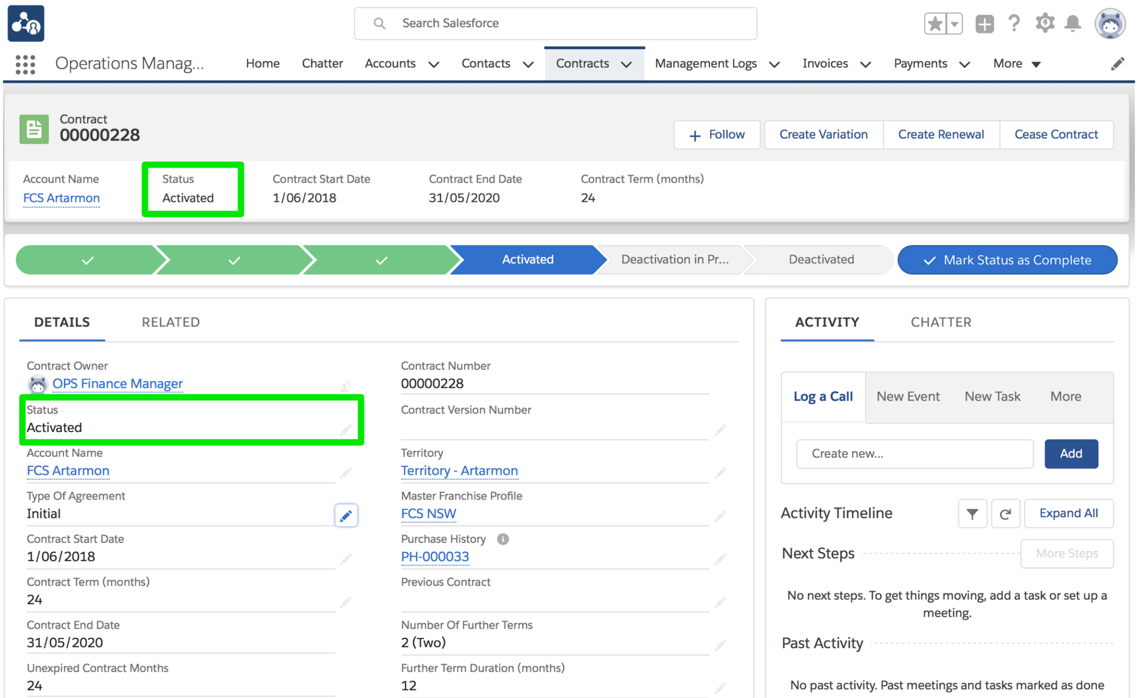
3. The contract's **Document Issued Date** is at least two weeks before the **Customer Signed Date**.



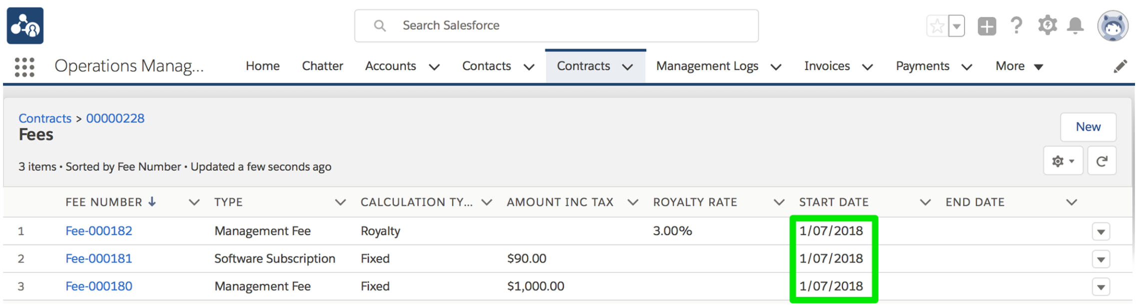
4. The **Contract**'s **Commencement Date** is correctly set.



5. The **Contract** has been **Activated**.



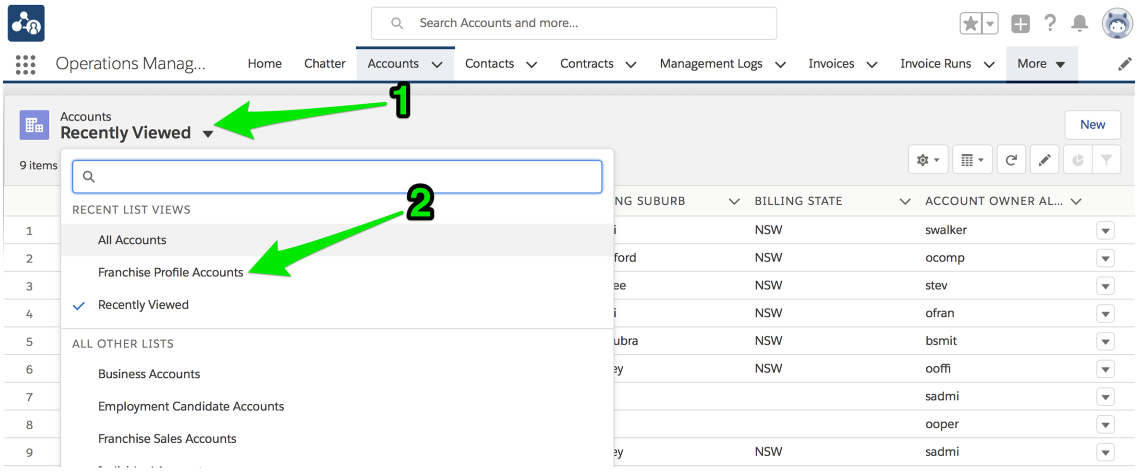
6. **Fees** have been correctly entered onto the **Contract**, and they have a `Start Date` that matches the **Contract** `Commencement Date`.



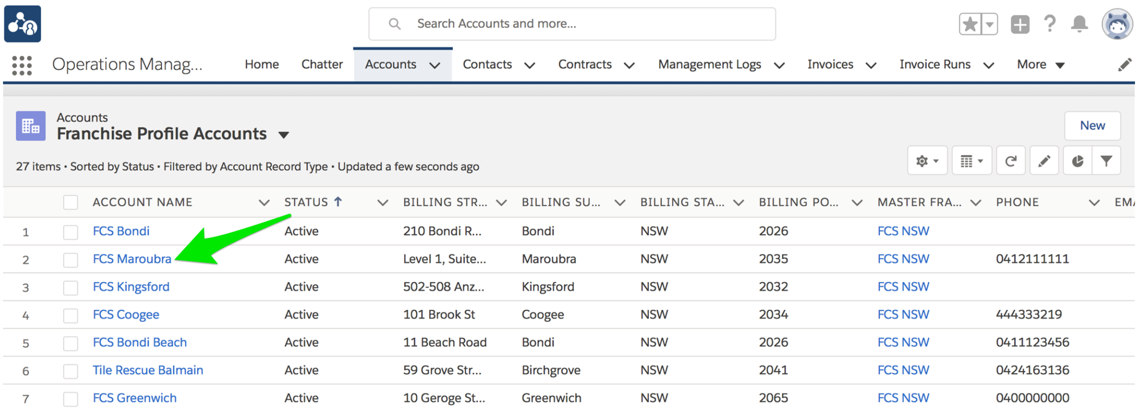
How to find contract fees for a franchise

To view all fees on a contract

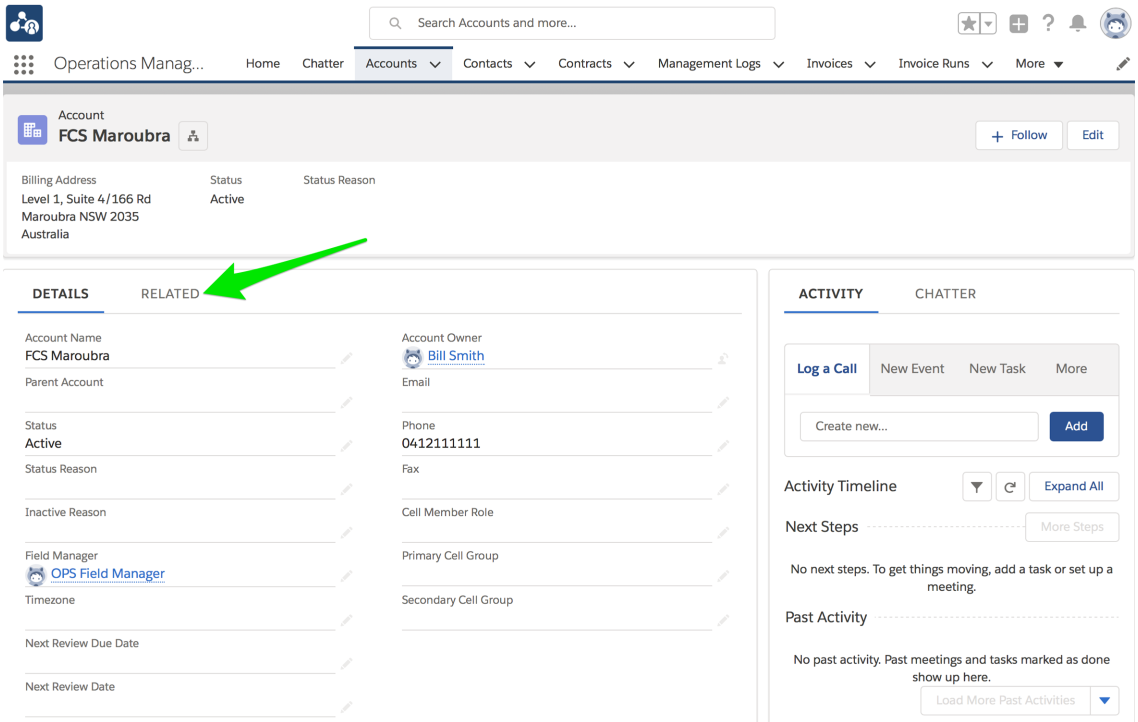
1. From **Accounts**, select the **Franchise Profile Accounts** list view.



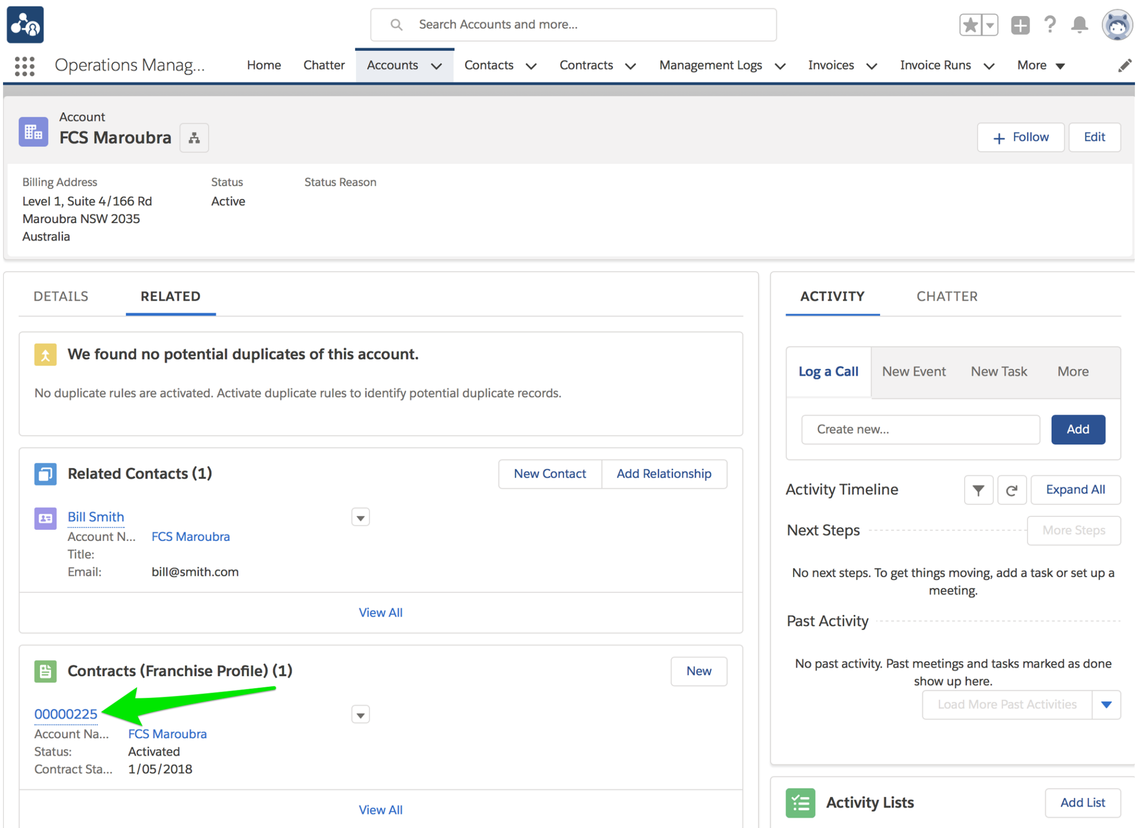
2. Select the relevant account.



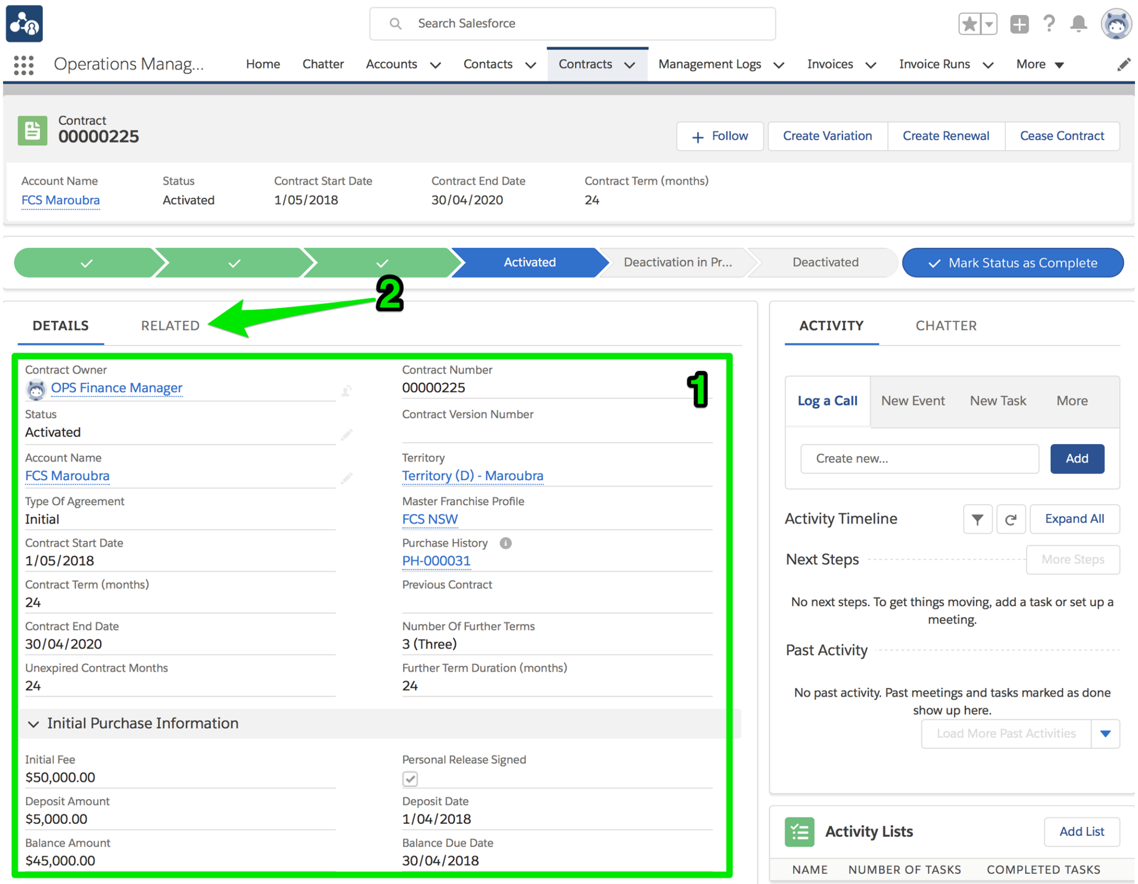
3. From the **Account**, select the **Related** tab.



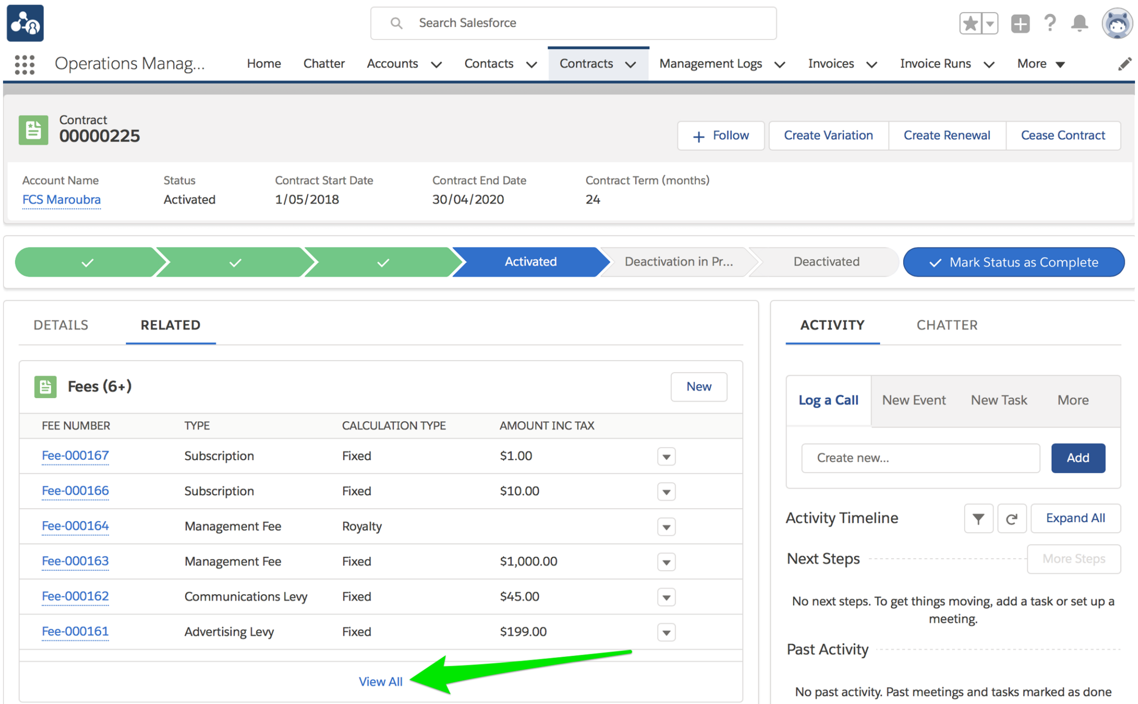
4. Locate the **Contracts** section, and select the contract whose `Status` is *`Activated`*.



5. Note the contract's current details. When ready, select the **Related** tab.



6. From the **Fees** section, press **View All**.



The **Fees** list shows all past and present fees associated with the **Contract**.

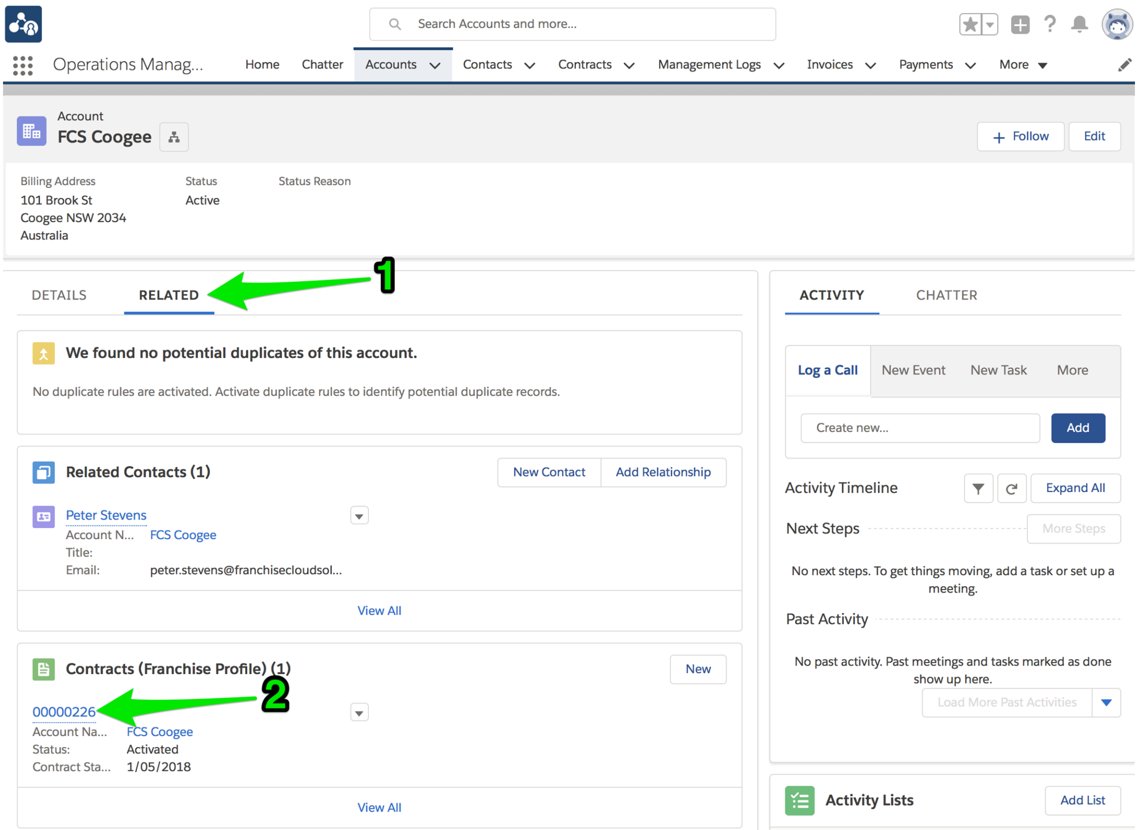
Franchise cessation

How to discontinue a franchise

To cause a franchise to cease to trade, you need to deactivate the **Contract** and then set the **Franchise Profile Account** to a `Status` of *`Inactive`*.

To discontinue a franchise

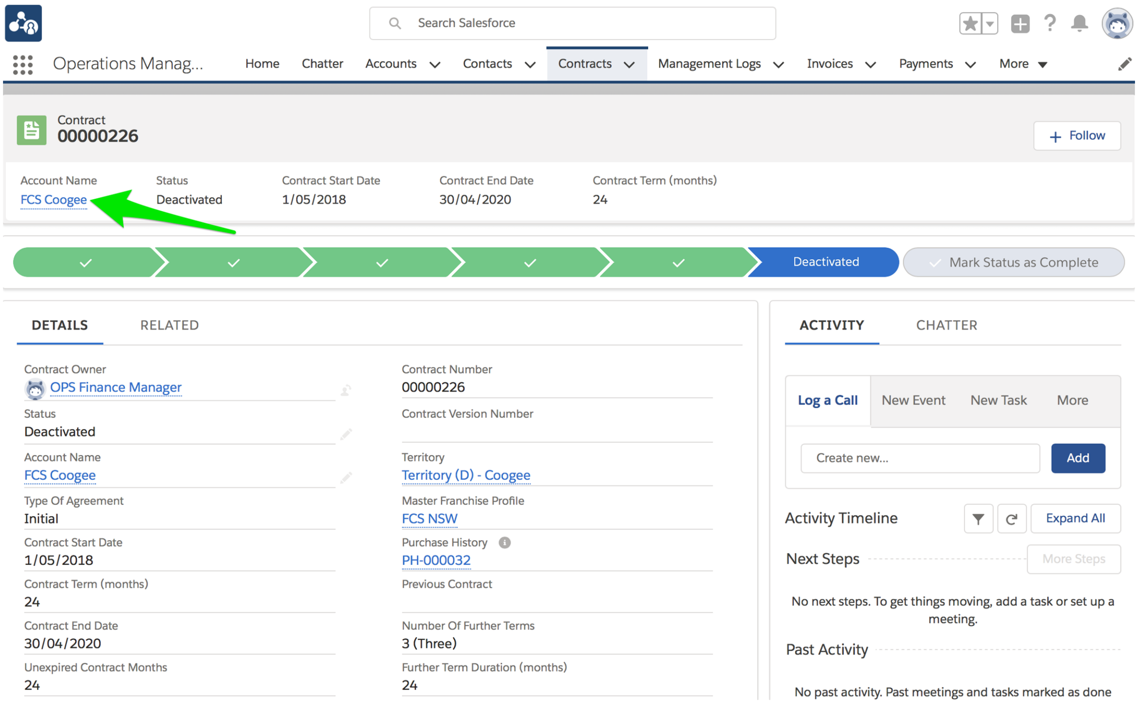
1. From the **Franchise Profile Account**'s **Related** tab, select the currently *`Activated`* **Contract**.



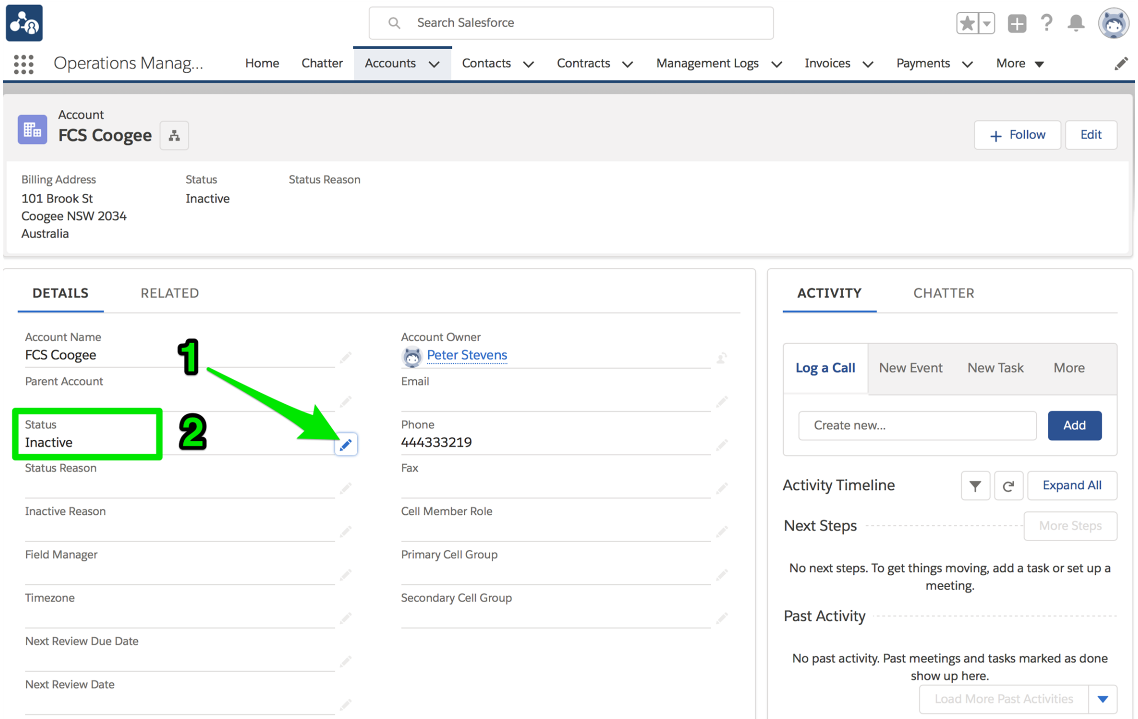
   The **Contract** appears.

2. Cease the contract. *See* "How to cease a contract" on page 63.

3. Now go back to the **Account**.



4. From the **Account**, mark the `Status` as *`Inactive`*.



You have now ceased the contract and inactivated the franchise. The franchise has been discontinued.

How to transfer franchise ownership

To transfer ownership of a franchise

1. Create the new **Contract** and **Franchise Profile Account**. *See* “Franchise setup” on page 78.
2. Insert the `Cessation Date` for the current franchisee’s **Contract**. *See* “Franchise cessation” on page 100.
3. Ensure the `Commencement Date` for the new franchisee’s **Contract** is set one business day after the current franchisee’s `Cessation Date`.
4. On the day of the transfer, ask your system administrator to transfer the **Territory** from the current **Franchise Profile Account** to the new franchisee’s **Franchise Profile Account**.

> When you transfer franchise ownership, you may also need to transfer the customer base. To do this, *See* How to transfer customer accounts.

How to configure a franchise profile for job allocation

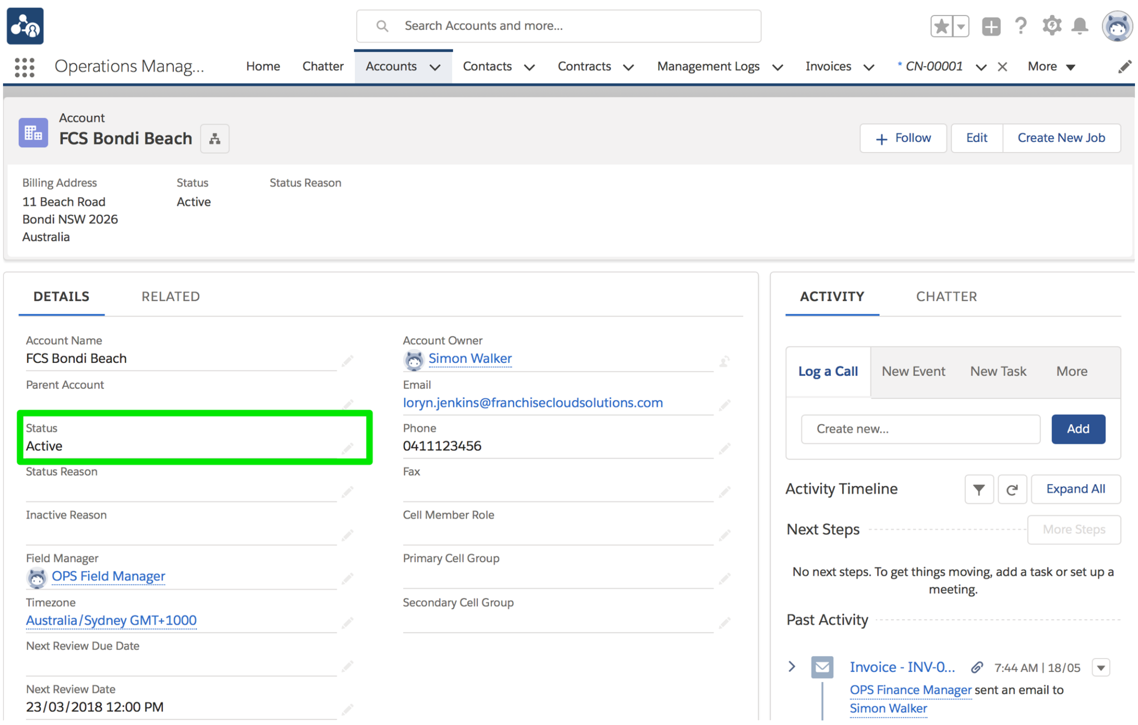
The job allocation process interacts heavily with the structure of accounts, territories and territory locations. Franchise-level settings strongly influence how jobs are allocated. Read these topics in conjunction with:

- “Understanding Job Allocation” on page 119
- “Managing Job Allocation” on page 143

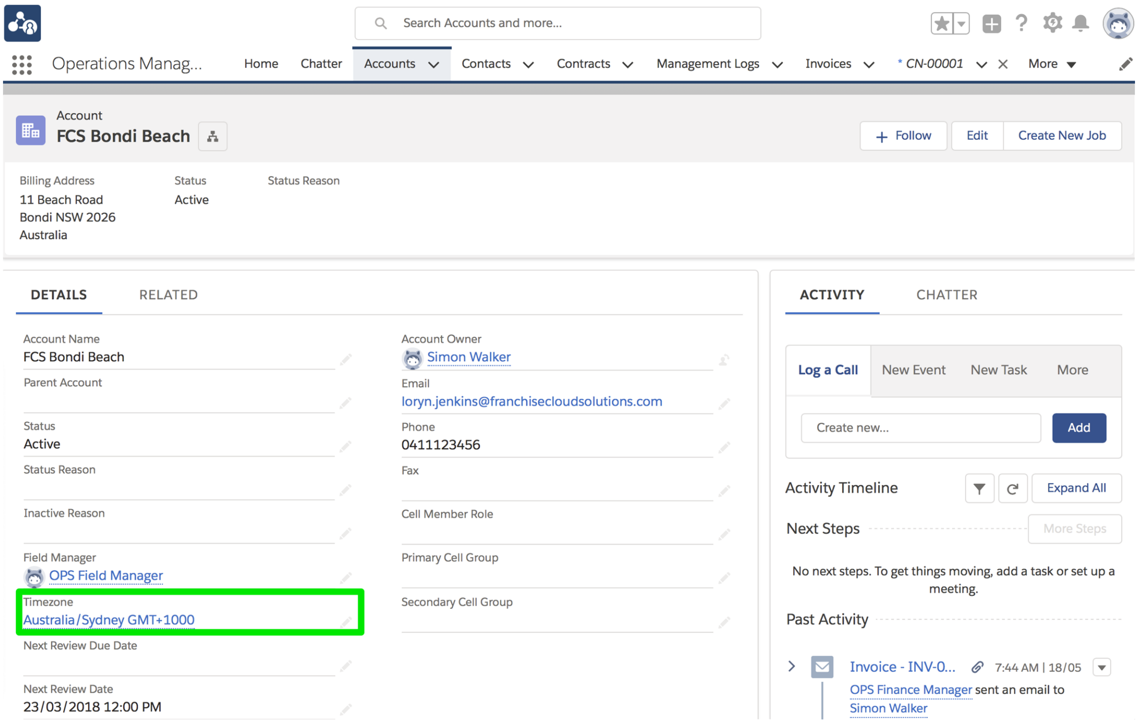
Mandatory settings

For jobs to be allocated

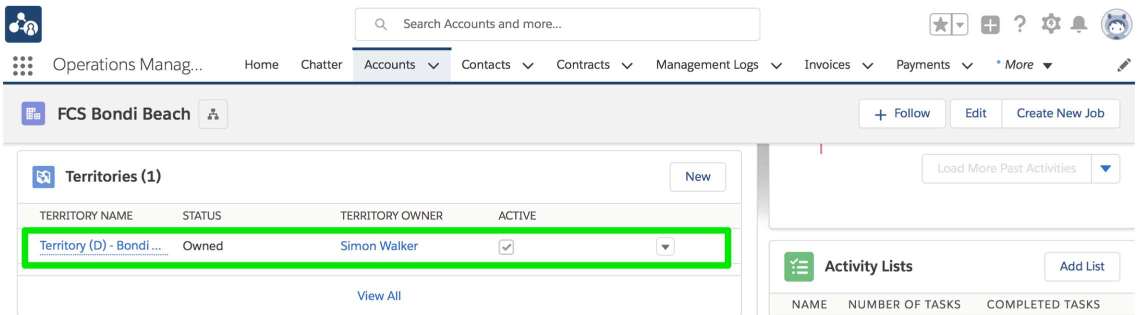
1. The **Franchise Profile Account** must have a `Status` of *`Active`*.



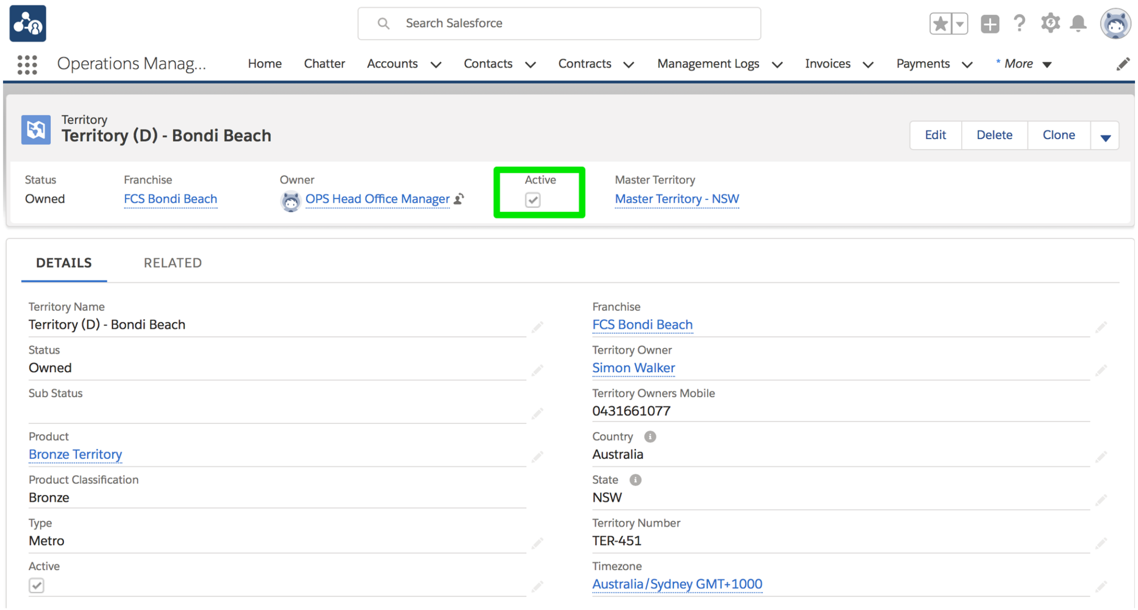
2. The **Franchise Profile Account** must have a valid `Timezone`.



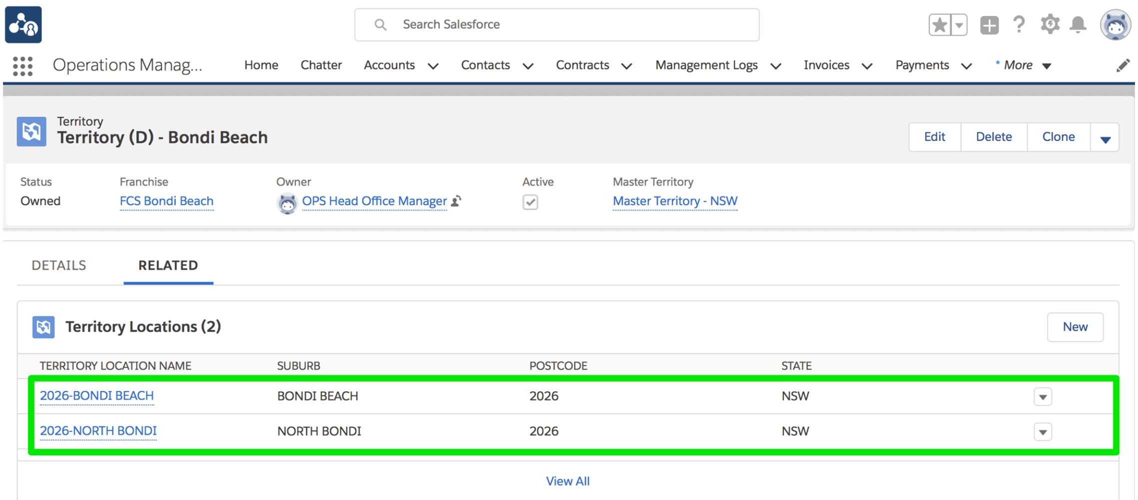
3. The **Franchise Profile Account** must be related to at least one **Territory**.



4. The **Territory** must be `Active`.



5. The **Territory** must have one or more **Territory Locations**.



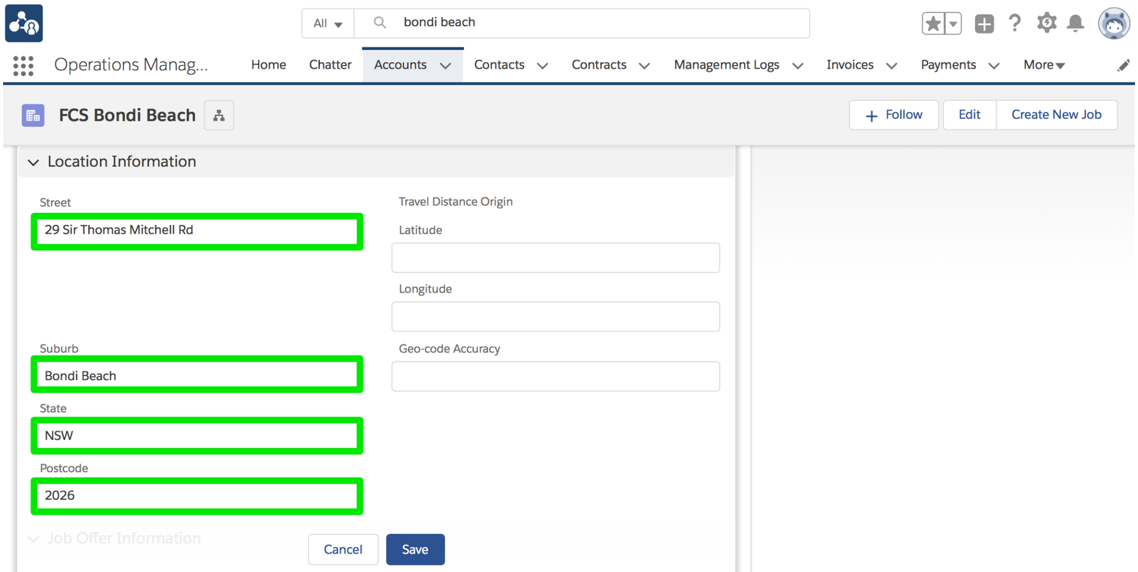
6. Travel distance origin must be set. *See* “Travel distance origin” below.
7. Max travel distance must be set. *See* “Maximum travel distance” on the next page.
8. Business hours need to be set. *See* “Business hours” on page 107.

Travel distance origin

The travel distance origin provides the geographic center of the area being served by the franchise. The travel distance origin might reference franchisee’s work address. However, it may be better to have it reference the street address closest to the geographic center of the territory.

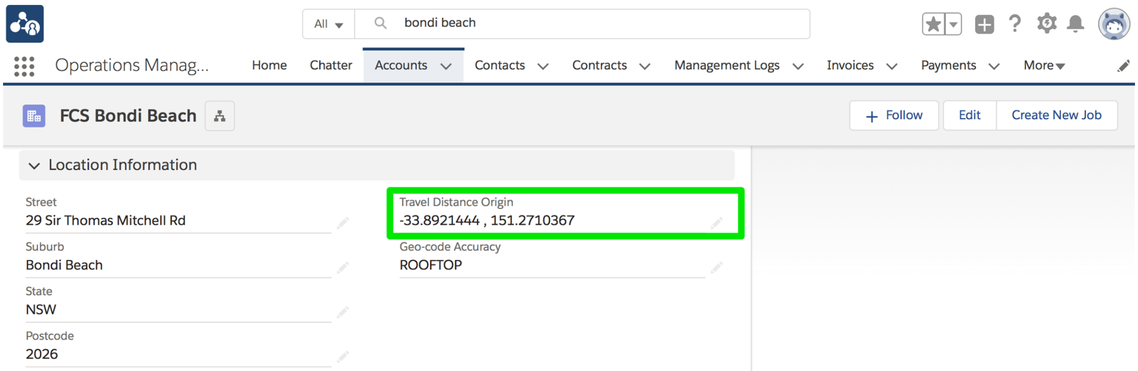
To set the travel distance origin

1. From the **Location Information** section, enter the exact street address (`Street`, `Suburb`, `State`, `Postcode`) of the location used for the travel distance origin.



2. Press **Save**.

   The travel distance origin is calculated automatically. When you next open the **Account**, you will see the calculated `Latitude` and `Longitude` recorded in `Travel Distance Origin`.

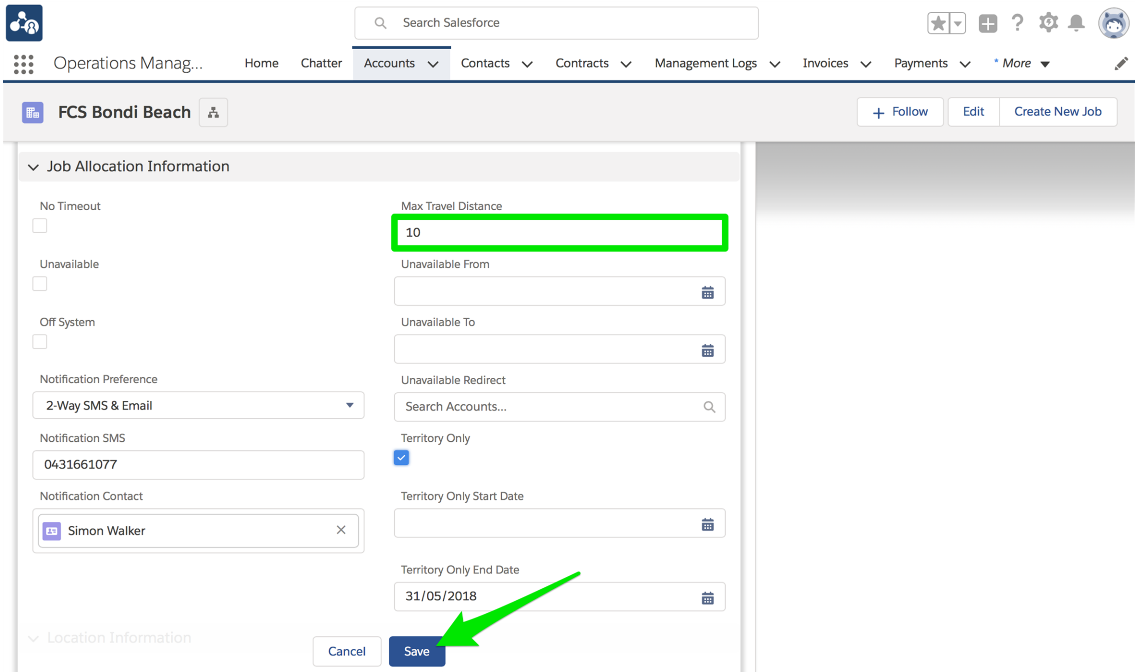


Maximum travel distance

The `Max Travel Distance` from the `Travel Distance Origin` defines the jobs for which this franchise will be considered for job potential.

To set the maximum travel distance

1. Enter the number of kilometers the franchisee is willing to travel, then press **Save**.



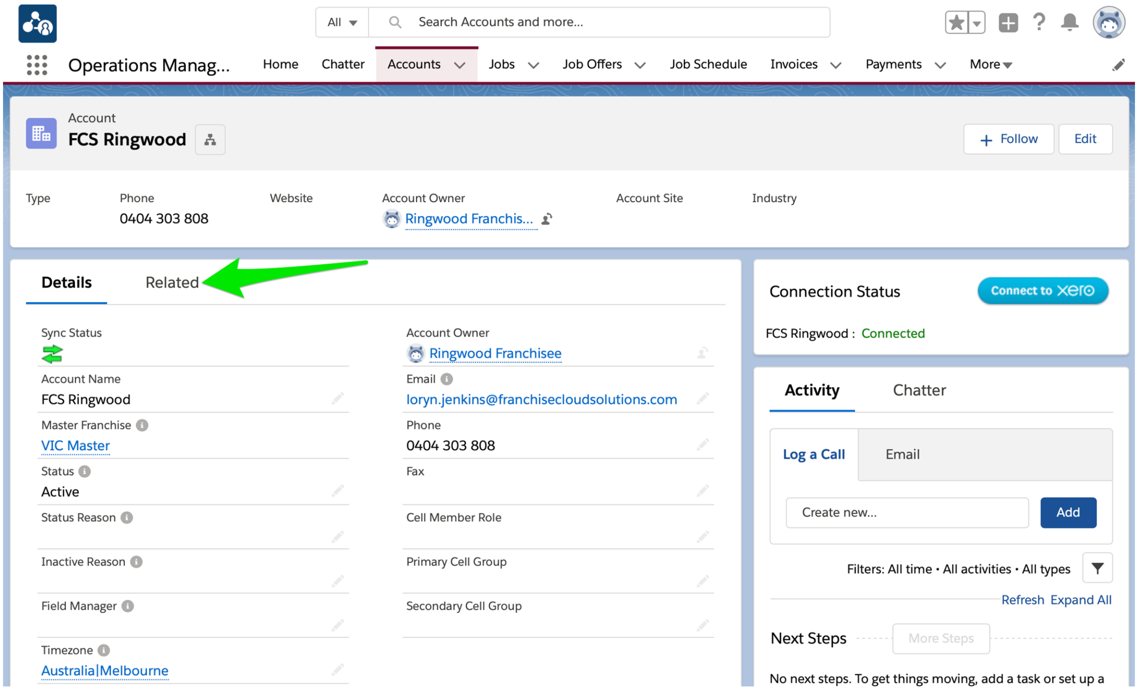
Business hours

When the Master Franchise Profile Account's Job Allocation Configuration is set to make `Offers Inside Contact Hours Only`, then Franchise Profile Accounts require contact hours to be set.

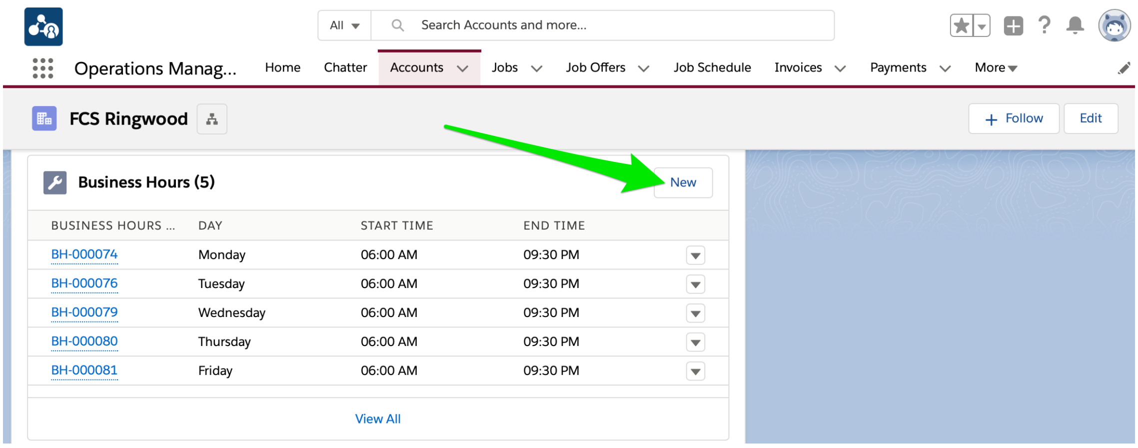
> Failing to set contact hours will result in fewer job offers being made to the franchise.

To configure business contact hours

1. From the **Franchise Profile Account**, select the **Related** tab.

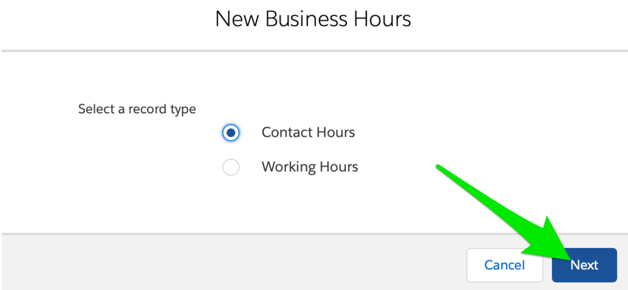


2. Scroll down to the **Business Hours** section, and create **New** records for your daily business hours.



When a **New** record is created, the **New Business Hours** dialog box displays.

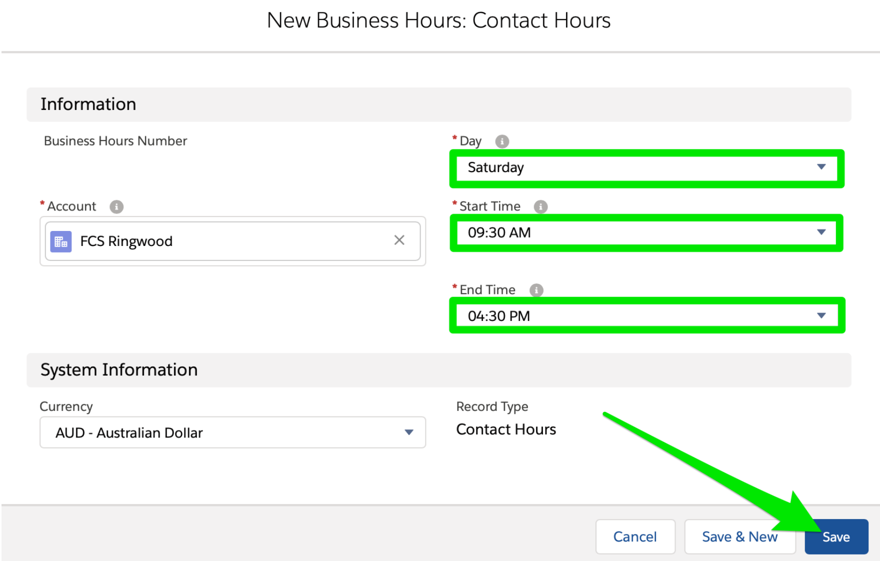
3. Leave the record type as `Contact Hours` and press **Next**.



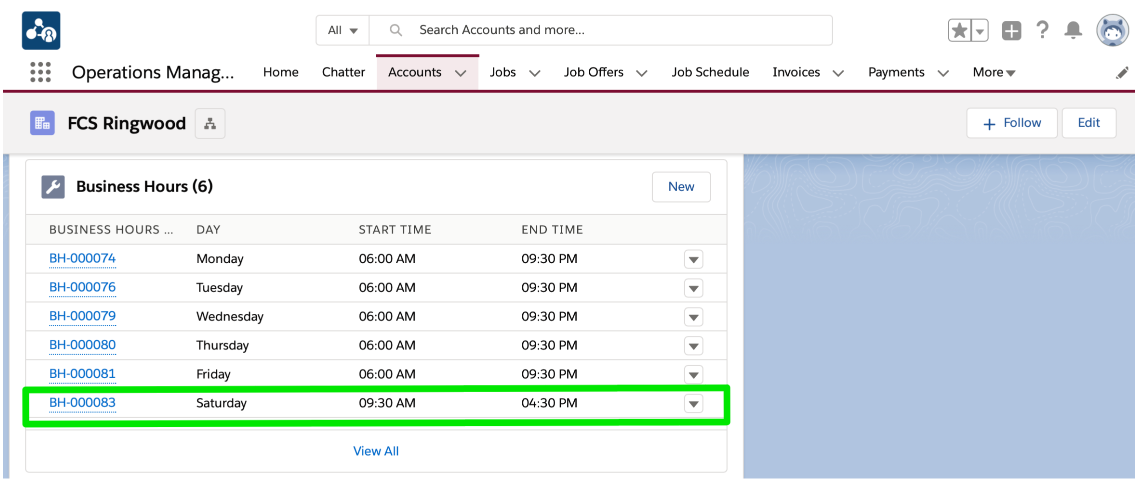
The **New Business Hours: Contact Hours** dialog box displays.

> Only ever set `Contact Hours`. The job allocation system does not recognize `Working Hours`.

4. Complete the details for the new **Contact Hours**, then press **Next**.



5. Your **Business Hours** are now updated.



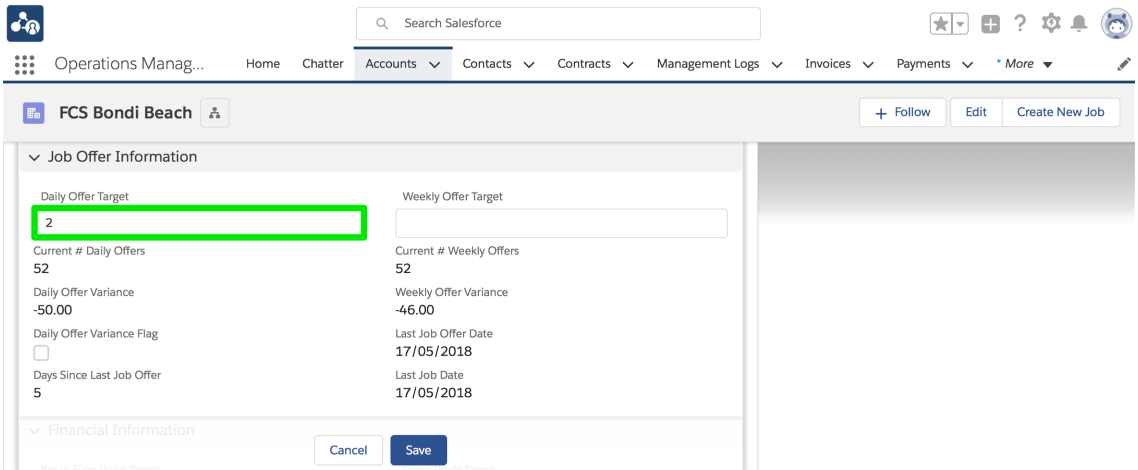
Daily and weekly offer targets

Daily and weekly offer targets represent the ideal number of job offers to be provided to this franchise through franchisor-originated job requests. In the default implementation, when daily and weekly offer targets are set the system attempts to distribute the target number of job offers to each franchise.

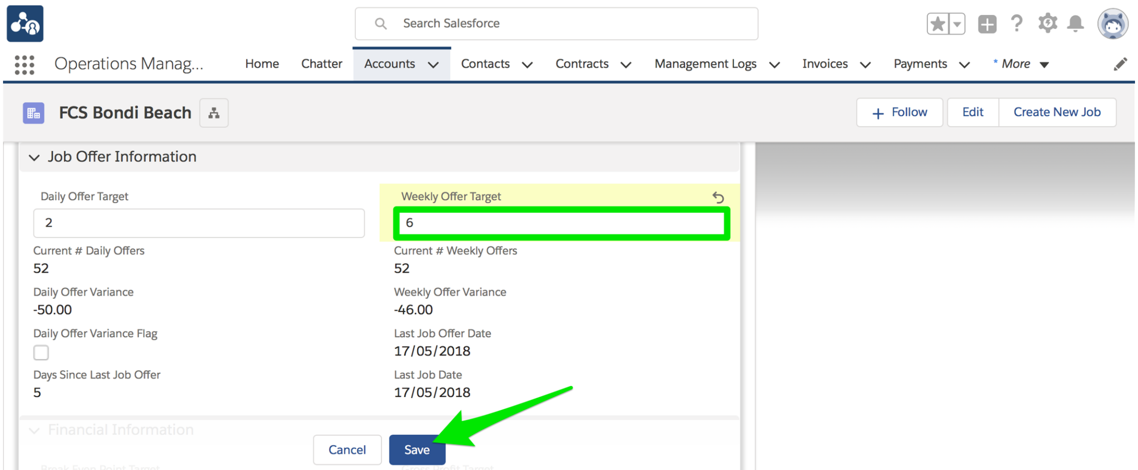
Check your site implementation notes to understand how your system has been configured.

To set the daily and weekly offer targets

1. Enter the `Daily Offer Target`.



2. Enter the `Weekly Offer Target`, then press **Save**.



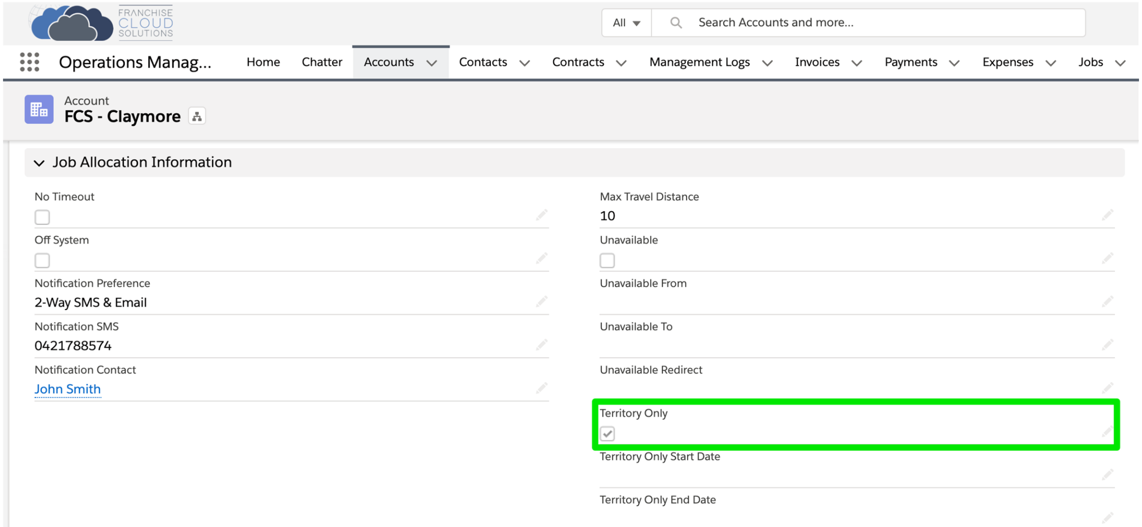
Territory only job offers

It is possible to limit a franchise to receiving job offers from the owned territory only. This can be set as a regular provision of the contract or as a temporary measure to improve the management of the franchise.

If any dates have been set, franchisees cannot switch off `Territory Only`.

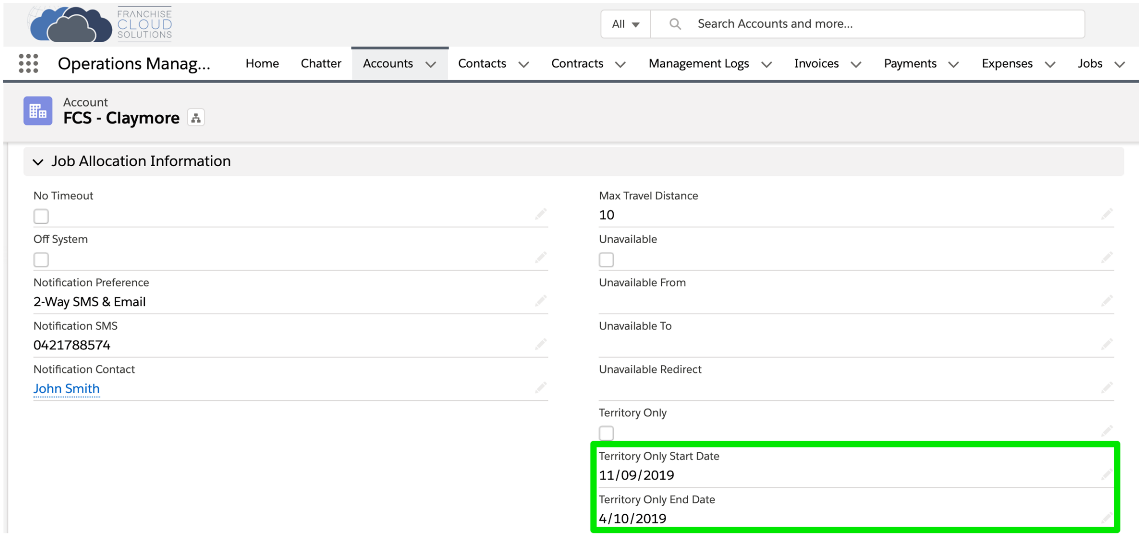
To restrict a franchise to territory-only offers

» Check the `Territory Only` check box.



To restrict a franchise to territory-only offers from predetermined start and end dates

» Enter the `Territory Only Start Date` and the `Territory Only End Date`

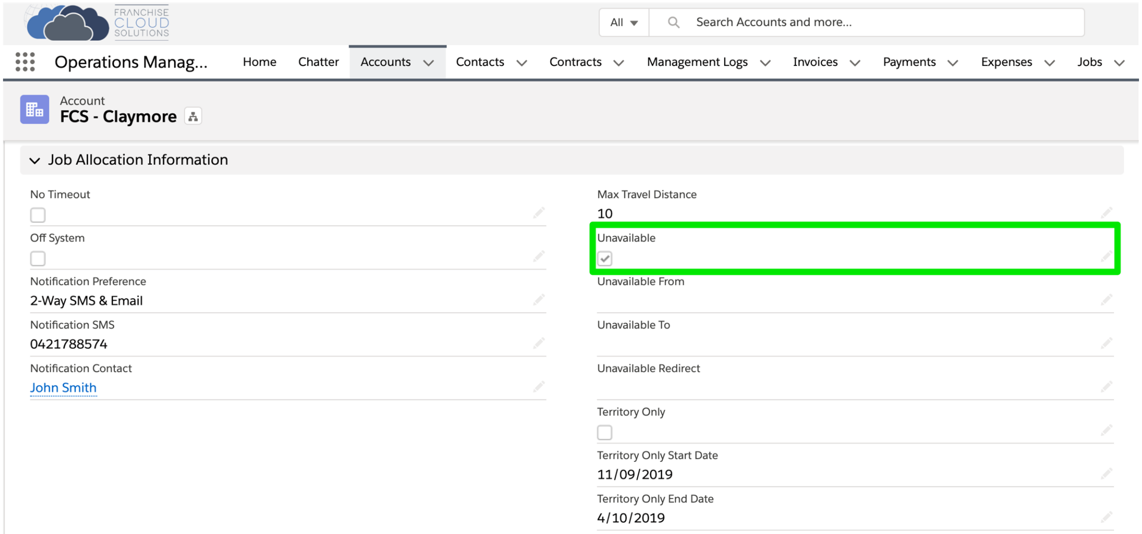


Temporary unavailability of franchisee

Whether it is holidays, temporary sickness or a huge project causing the franchisee to be unavailable for new job offers, you can indicate franchisee unavailability to receive new job offers. You can also redirect any job offers that would have been received to another franchise. This can be useful where franchisees have agreed to cover each other during planned vacation leave.

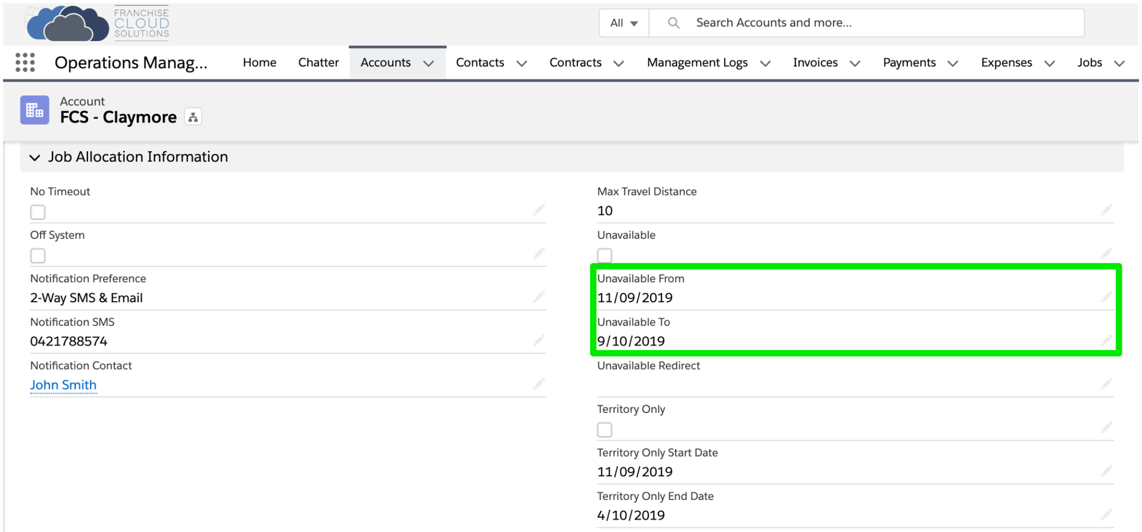
To indicate that a franchise is unavailable to receive job offers

» Check the `Unavailable` check box.



To indicate that a franchise is unavailable to receive job offers from predetermined start and end dates

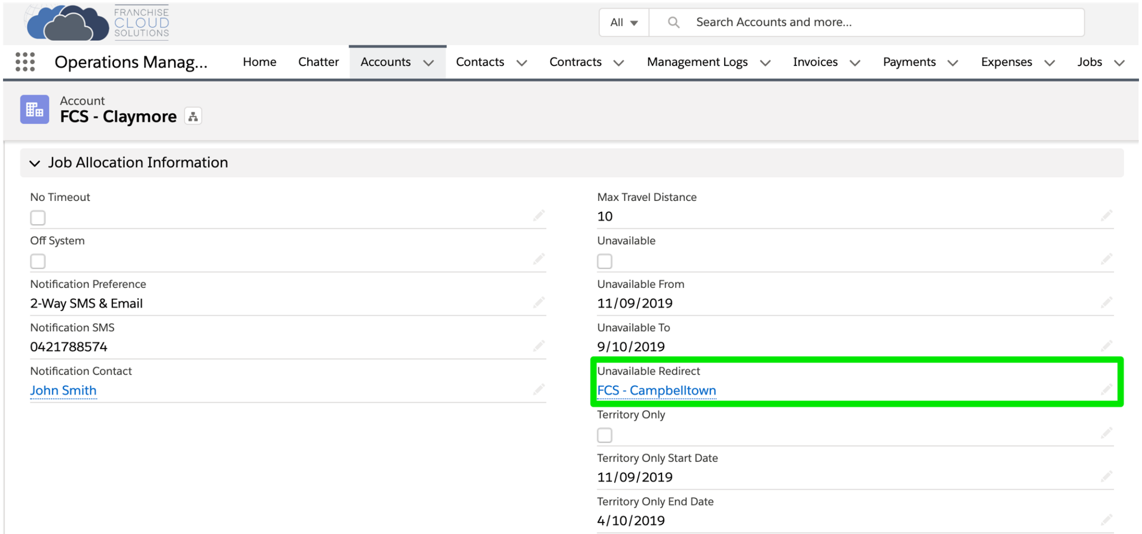
» Enter the `Unavailable From` and the `Unavailable To` dates.



The `Unavailable` checkbox will be switched on once the `Unavailable From` date is reached. If the `Unavailable From` date is set to today's date, it will be switched on overnight.

To redirect job offers from an unavailable franchisee to another franchisee

» In conjunction with any of the unavailability options, check the `Unavailable Redirect` check box



Off system franchisees

While it is ideal that every franchisee use the system, there are cases where it is prudent to allow some franchisees not to use Business Management. These franchisees still need an active Franchise Profile Account, an active contract with the requisite contract fees. They will still be configured for Job Allocation. The only difference is that they will not log in and use Business Management for management of their jobs, invoices and payments.

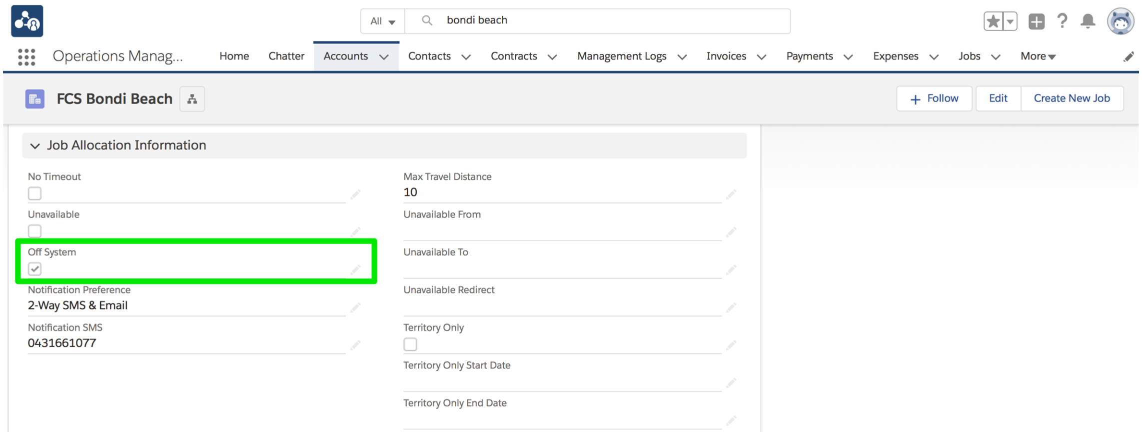
> You should not allow off system franchisees where their contract fees contain royalties based on invoice value.

> You may allow contract fees containing fixed fees and royalties based on POS data.

An off system franchisee will still receive emails or SMSs to notify them of job offers. When they accept the job offer, they will receive an email containing a summary of the job details. They can use the email summary to contact the customer and win the job.

To mark a franchisee as being off system

» Check the `Off System` check box.



Job notifications

Franchisees can view job offers in Business Management. They can also view them within the Salesforce mobile app. By default, franchisees can be notified of job offers by email.

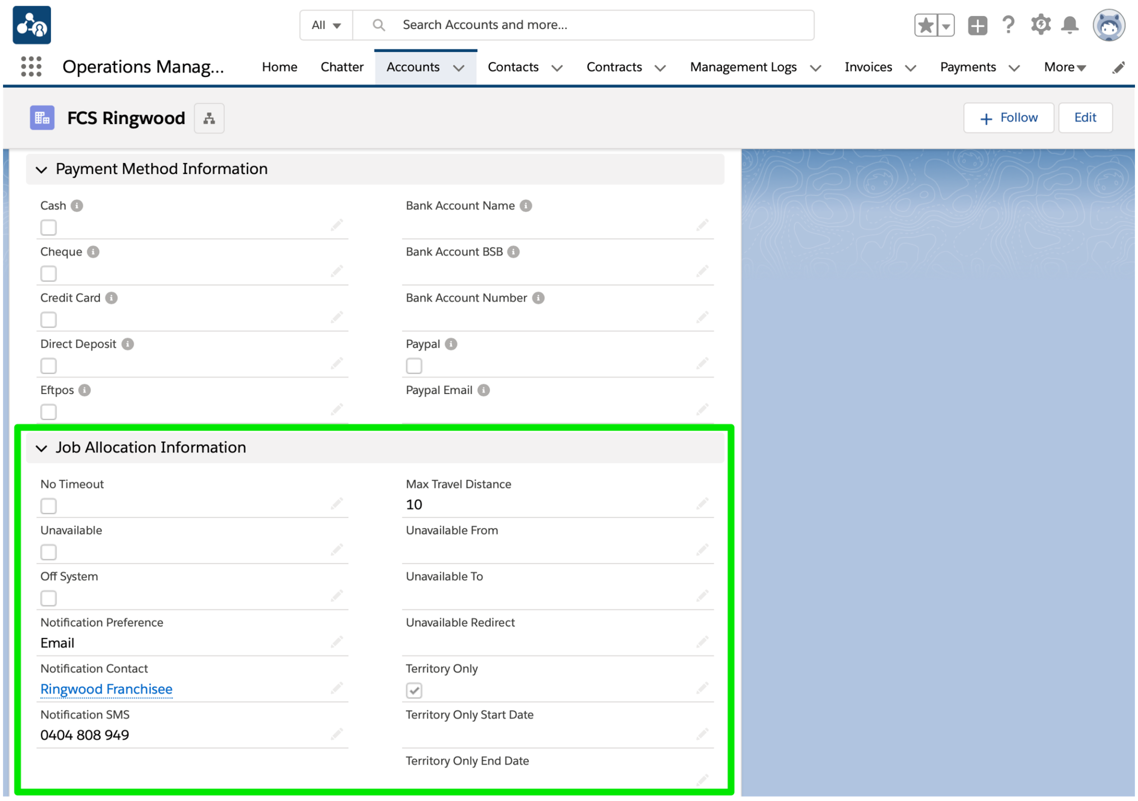
If you have licensed the Franchise Cloud Solutions SMS Management option, you can choose to notify franchisees by

- email
- SMS
- SMS and email

> SMS is an optional feature offered by Franchise Cloud Solutions. Check with your system administrator to see if your organization has licensed SMS Management.

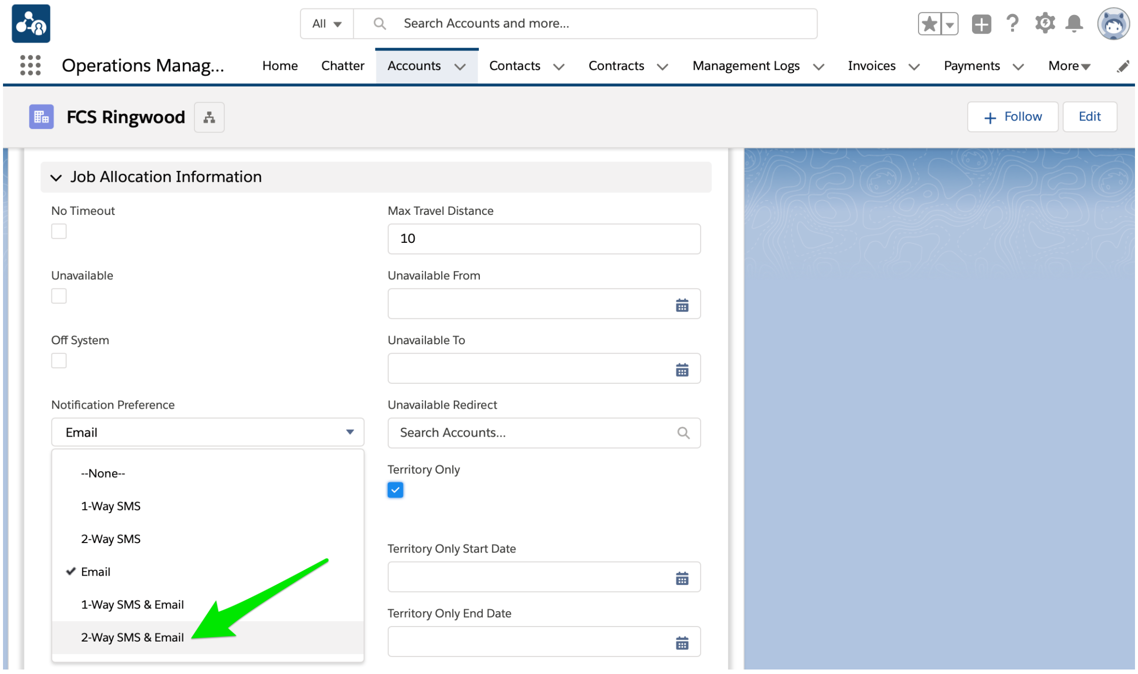
To configure email and SMS notifications

1. Within the **Franchise Profile Account**, scroll down to **Job Allocation Information**.



`Notification Preference` controls whether the job offer is sent by email, SMS or both.

2. Select the appropriate option from `Notification Preference`.

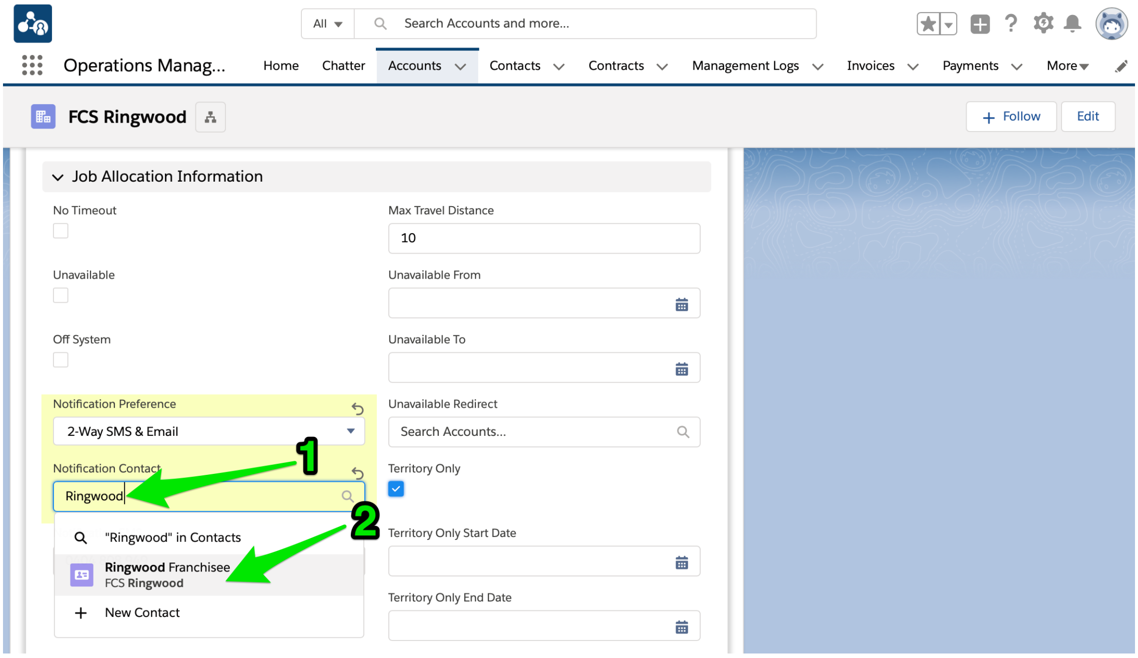


> If SMS options are not available you may not be licensed for SMS Management.

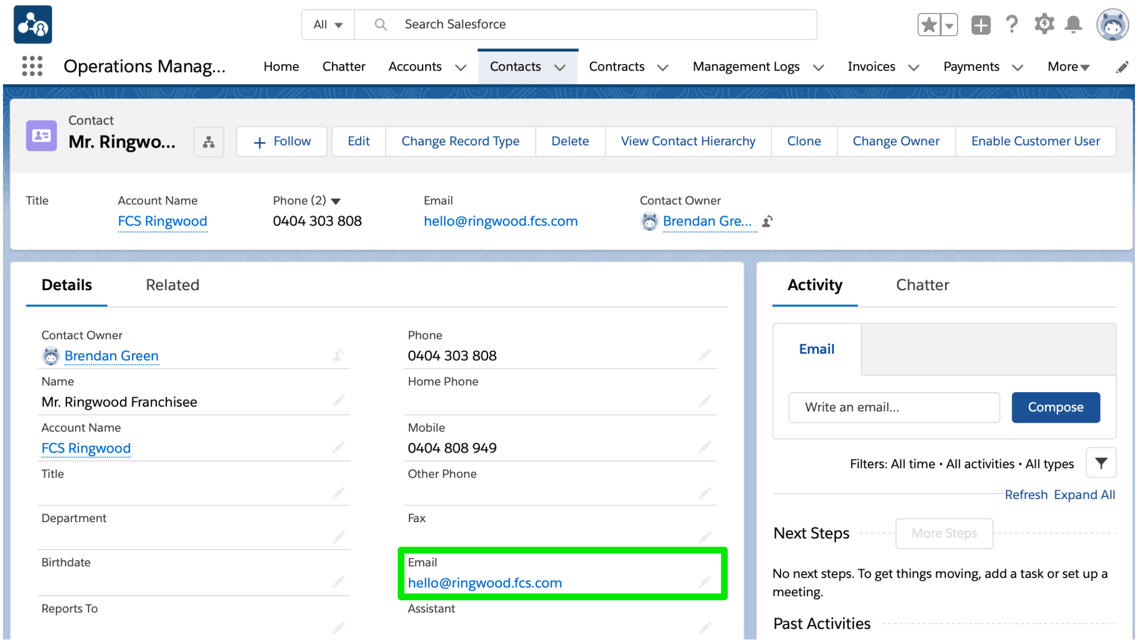
3. If your organization has licensed SMS Management, enter the appropriate mobile phone number into `Notification SMS`.

   Now we need to set the correct notification email.

4. Select the desired `Notification Contact` then press **Save**.



5. Click the `Notification Contact` link and check that the **Contact** `Email` is correct.



CHAPTER 4

Understanding 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

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:

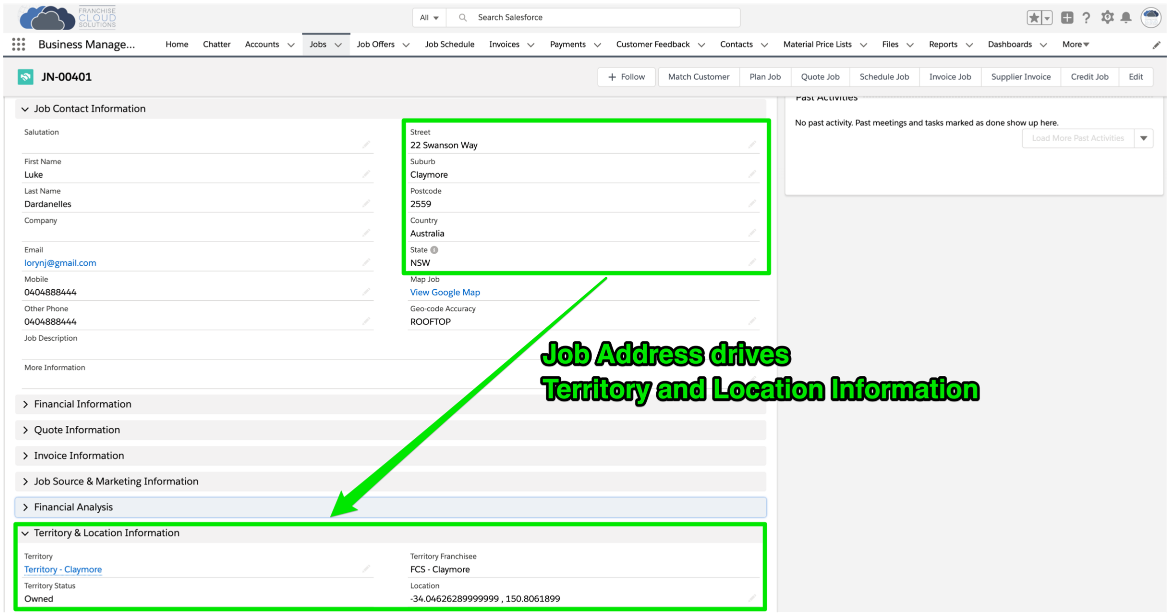
» How the Job Allocation System works

» 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” on page 143.

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+)

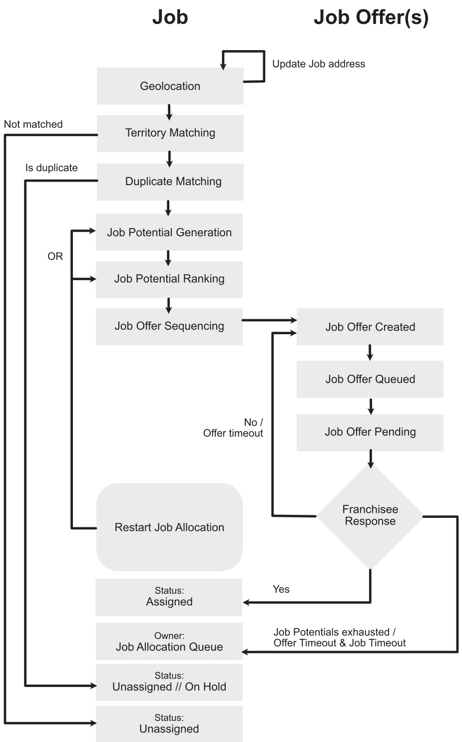
JOB POTENTIAL: JOB POTENTIAL NU...	ACCOUNT NAME	EXCLUSION REASON	OFFERED
JPN-00797	FCS - Narellan Vale	Potential is on Territory Only	☐
JPN-00799	FCS Maroubra	Potential Franchisee is not active	☐
JPN-00794	FCS - Bexley		☑
JPN-00793	FCS - Kingsgrove		☐
JPN-00796	FCS - Sans Souci		☐
JPN-00798	FCS - Campsie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

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" on page 143.

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).



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

Geolocation

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

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.

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*.

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.

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.

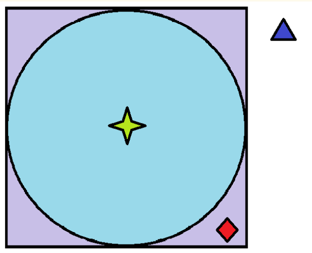
> By road will always be further than the straight-line distance. Fewer job potentials will be returned (compared with the straight line method) for any given travel distance.

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

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

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

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



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

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

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

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

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

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

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

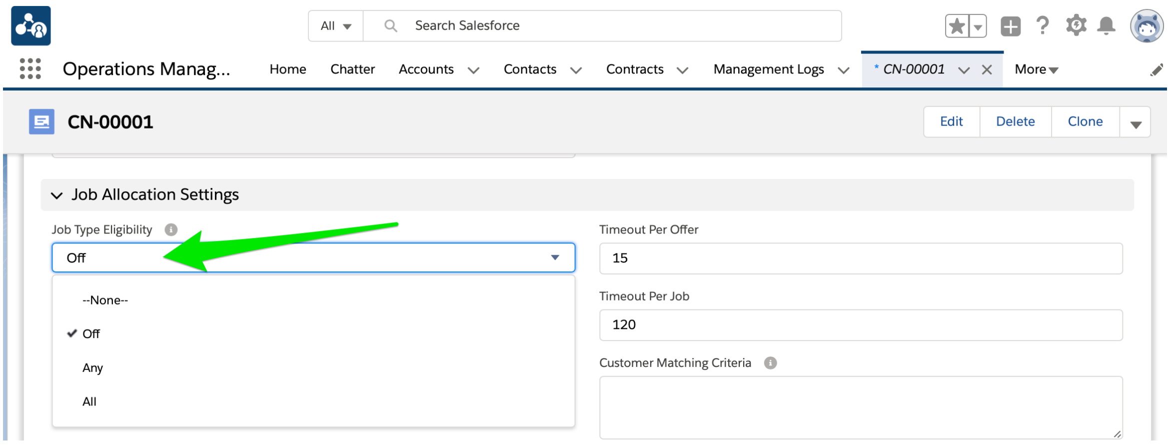
Some eligibility requirements are built into Operations Management. The two major built-in eligibility criteria are

- 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.

Ranking

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

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.

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.

Job offers

When a job is offered to a franchisee, the system creates a **Job Offer** record.

The **Job** record (where the outcomes of allocation processing has been recorded to this point) and the **Job Offer** record are two different types of records. There are often multiple **Job Offers** issued for each **Job** record.

Understanding the behavior of the Job Allocation System (JAS) during an allocation process now requires attending to both the **Job** record and any **Job Offer** records that have been issued.

Queued

Some job offers are placed in a `Status` of *Queued*. While the **Job Offer** is *Queued*, it has not been sent to the franchisee.

A **Job Offer** may be *Queued* for one of two reasons:

1. The **Job** is in a **Territory** owned by the franchisee and there is an existing **Job Offer** that is *Pending*. (This can only happen when the `One Offer At A Time` and `Queue In Territory Offers` options are selected within the Master Franchise Configuration Set.)

2. The **Job** is in a **Territory** owned by the franchisee and the Job Offer was created outside of Franchise's Business Hours. (This can only happen when the `Offer Inside Contact Hours Only` and `Queue In Territory Offers` options are selected within the Master Franchise Configuration Set.)

> You can tell at a glance which of the two reasons a Job Offer is queued. If the `Scheduled Offer Time` field is populated, the Job Offer is queued because it is outside Business Hours. If the field is blank instead, it is queued due to an already-pending offer.)

Pending

A Job Offer whose Status is Pending will typically be notified to the franchisee. The franchisee may receive the notification and respond via one of the following channels:

- **Salesforce web interface.** The franchisee can see Job Offers within the Business Management app within Salesforce. When a Job Offer is Pending, the franchisee may accept Job Offers within Salesforce.
- **Salesforce mobile interface.** The franchisee can see Job Offers within the Salesforce mobile interface. When a Job Offer is Pending, the franchisee may accept Job Offers within Salesforce mobile.
- **Email.** The franchisee may be configured to receive emails notifying them of new job offers. The franchisee can accept or reject job offers by responding to the email.
- **SMS.** The franchisee may be configured to receive SMS notifying them of new job offers. The franchisee can accept or reject job offers by replying to the SMS using the code within the SMS.

> **Configuring Job Offer Notifications**
>
> To configure Email or SMS Notifications, *See* "How to configure a franchise profile for job allocation" on page 103.

> **SMS an optional component**
>
> SMS is an optional component that may be licensed for your implementation. Check with your system administrator to determine whether or not SMS has been licensed for your implementation.

Accepted or Rejected

When the `Status` is *`Accepted`*, the **Job** is allocated to the first franchisee to *`Accept`* it.

Sometimes franchisees accept a **Job Offer** after the `Offer Time Out`. In this case, the `Status` on the **Job Offer** won't be accepted: it will be *`Expired`*.

When the `Status` is *`Rejected`*, the job will be offered to the next-highest ranked franchise (in Sequential processing), or, if there are no other Job Potentials, the **Job** will be placed in the `Job Offer Queue` by becoming the **Job**'s `Owner`.

Expired

When the current time reaches the `Offer Time Out` value without a response from the franchisee, the **Job Offer** is set to a `Status` of *`Expired`*. **Job Offers** that are *`Expired`* can no longer be accepted or rejected by the franchisee.

If `Job Time Out` is blank, it is because the `No Timeout in Owned Area` option is set in the Master Franchise Configuration Set.

When an `Offer Time Out` is evaluated, if the current time has reached or exceeded the `Job Time Out`, no further franchisees will be offered the job, even if there are more Job Potentials listed on the **Job**.

If there is no `Offer Time Out` (e.g. the `No Timeout In Owned Area` option is selected in the Master Franchise Configuration Set) the `Job Time Out` value is not evaluated.

Using job offers in Salesforce

When a franchisee logs into Salesforce, they can review any **Job Offers** that have been extended to them. When they are viewing a **Job Offer** with a `Status` of *`Pending`*, they can *`Accept`* or *`Reject`* it.

A franchisee may choose to log into Salesforce, choose the Job Offers tab, and then view the Job Offers Today list view. The franchisee will then see all Job Offers that have been offered today.

Using job offers in Salesforce Mobile

When a franchisee logs into Salesforce's mobile app, they can review any **Job Offers** that have been extended to them. When they are viewing a **Job Offer** with a `Status` of *`Pending`*, they can *`Accept`* or *`Reject`* it.

A franchisee may choose to log into Salesforce mobile, tap the **Menu** and select the **Job Offers** item. They can then view the **All Job Offers Today** list.

Receiving job offers by email notification

An Email Notification is sent to a franchisee if their Franchise Profile Account is configured to allow Email Notifications to be sent.

> An Email Notification is not the **Job Offer**. An Email Notification is an optional service that alerts a franchisee that a Job Offer is pending, and can receive an *`Accept`* or *`Reject`* response if the response is given within period before the **Job Offer**'s `Offer Time Out` is reached.

Receiving job offers by SMS notification

> SMS is an optional feature offered by Franchise Cloud Solutions. Check with your system administrator to see if your organization has licensed SMS Management.

An SMS Notification is sent to a franchisee if their Franchise Profile Account is configured to allow SMS Notifications to be sent.

> An SMS Notification is not the **Job Offer**. An SMS Notification is an optional service that alerts a franchisee that a Job Offer is pending, and can receive an *`Accept`* or *`Reject`* response if the response is given within period before the **Job Offer**'s `Offer Time Out` is reached.

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`*.

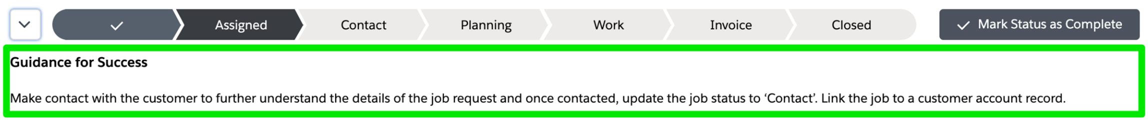
Other Job Statuses allow you to manually set the `Status` or the `Substatus` fields.

> 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 obsolescent. 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, waiting to be allocated.
	On Hold	Manual	Job has been placed on hold by the Job Allocation system due to inability to assign to a Franchisee. Requires manual intervention in order for it to be assigned to a franchisee.
Assigned	--None--	Auto	Job has been assigned to a franchisee. Franchisee is yet to make contact with the customer.
	Manually Allocated	Auto	Job has been force allocated to a Franchisee. Franchisee is yet to make contact with the customer.

Job Status	Substatus	Transition	Description
Contact	Attempted	Manual	Franchisee has attempted contact (called, sent text or email) without yet making contact.
	Successful	Manual	Franchisee has made contact with the customer.
	Site Visit Pending	Auto	Franchisee has scheduled a site visit. Good practice is to ensure the site visit is recorded within the Job Calendar.
	Site Visit Completed	Manual	Franchisee has visited the site.
	On Hold	Manual	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
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.
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 5

Managing Job Allocation

Job allocation management

The Job Allocation System allocates most jobs to franchisees with no head office intervention. A small number of jobs will still require manual intervention in order to allocate them. At least one person at head office will need to dedicate part of their day to monitoring the job allocation process to deal with the jobs requiring manual intervention.

Exception monitoring

Exception monitoring involves checking for jobs that have either not entered Job Allocation, or those that have passed through Job Allocation without being allocated. You can check for each condition by regularly checking three reports:

» Jobs that have not entered job allocation remain unassigned. They can be found using an **Aged Jobs** report. For details, *See* “How to check for unassigned jobs” on the facing page.

» Jobs that were deemed to be duplicates of another job are not automatically allocated. To monitor for duplicates, *See* “How to check for duplicate jobs” on page 147.

» Jobs that have passed through job allocation without being allocated become owned by the Job Allocation Queue. To monitor for these jobs, *See* “How to check for unallocated jobs” on page 149.

> The most common reasons for jobs needing manual intervention are:
>
> » The job address is misspelled or otherwise incorrect in some way.
>
> » The job address is correct, but Google cannot identify which of two addresses is correct (e.g. `199 Burrendah Blvd` vs `1/99 Burrendah Blvd`).
>
> » The job appears to be a duplicate of another recent job.
>
> » No franchisee accepted the job offer within the job timeout.
>
> In each of these cases, manual intervention is a normal business process (i.e. it is not an error).

> Sometimes, misconfigured data can prevent job allocation. To help identify when this occurs, *See* “Troubleshooting job allocation” on page 166.

How to take action

Once you’ve identified jobs that are unassigned, duplicate or owned by the job allocation queue, you take action using the topics outlined in this chapter.

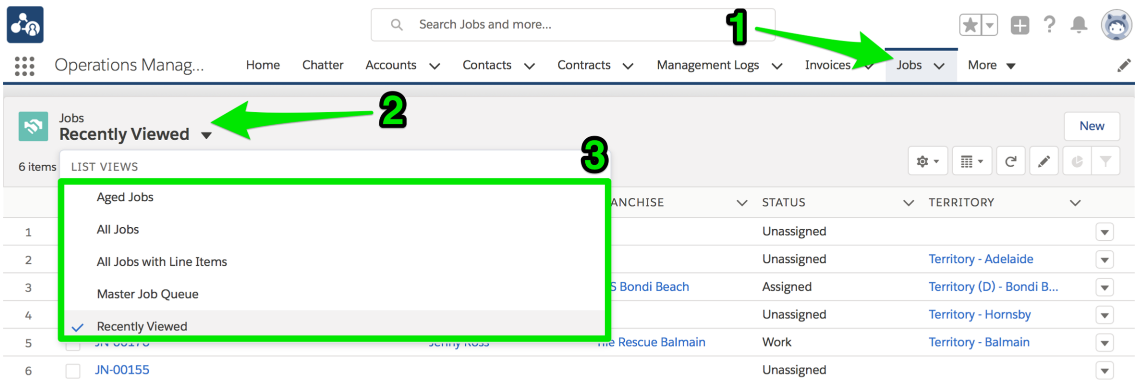
How to check for unassigned jobs

The job allocation process handles the vast majority of jobs automatically. No matter how good the configuration, there are always likely to be some jobs that require manual intervention. You can check for jobs requiring manual intervention by consulting the list of jobs still unassigned after a certain period of time.

> You will need to identify the period after which you will choose to begin monitoring and potentially intervening.

To check for unassigned jobs

1. From the Salesforce **Jobs** menu, look for a list view named **Aged Jobs**.



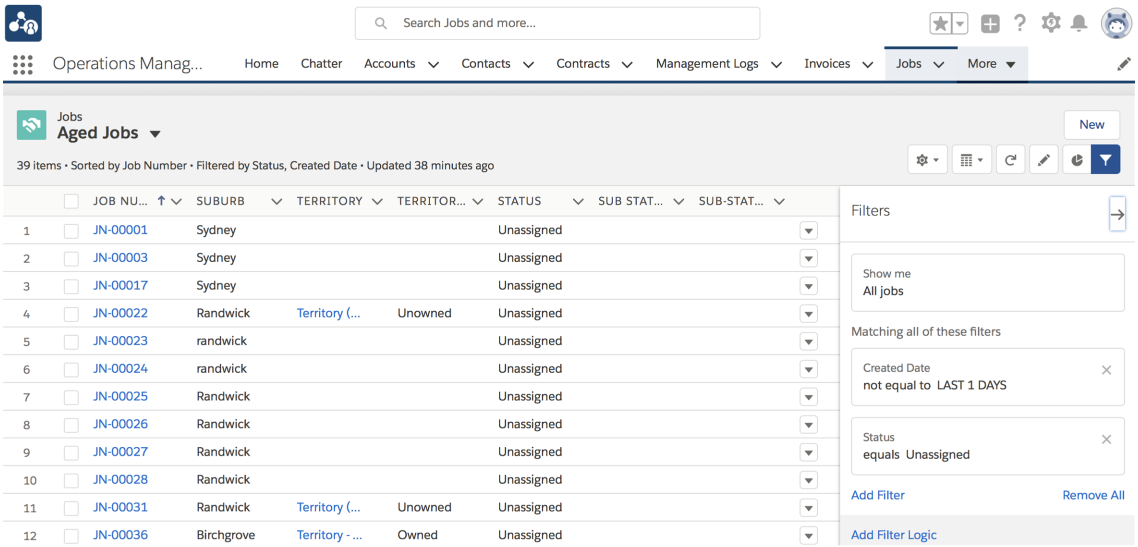
> It is possible you don’t have an **Aged Jobs** list view.

2. If you find the **Aged Jobs** list view, select it. You will need to examine jobs in on this list to see whether they are actually duplicates.
3. If you do not find the **Aged Jobs** list view, you will need to create it.

To create the Aged Jobs list view

1. Follow the instructions for creating a custom list view. *See* “How to create your own list view” on page 18.

2. When choosing the filters for the list view, make them `Show All Jobs` where `Created Date` not equal to `LAST 1 DAYS` and `Status` equals `Unassigned`.



3. Add columns that you find useful. *See* “How to add columns to a list view” on page 21.
4. Share this list view so that everyone in your organization can see it. *See* “How to share list views” on page 24.

To deal with aged jobs

Aged jobs require manual intervention. You may need to check with the customer and/or franchisee to determine whether the customer is still asking for the job or whether a franchisee can be found to accept the job.

1. When you do find a franchisee willing to take the job, you will need to manually allocate the job to the franchisee. *See* “How to manually allocate a job” on page 161.
2. When you are unable to find a franchisee to take the job or if the customer is no longer asking for the job to be done, you will need to close the job. *See* “How to manually close a job” on page 165.

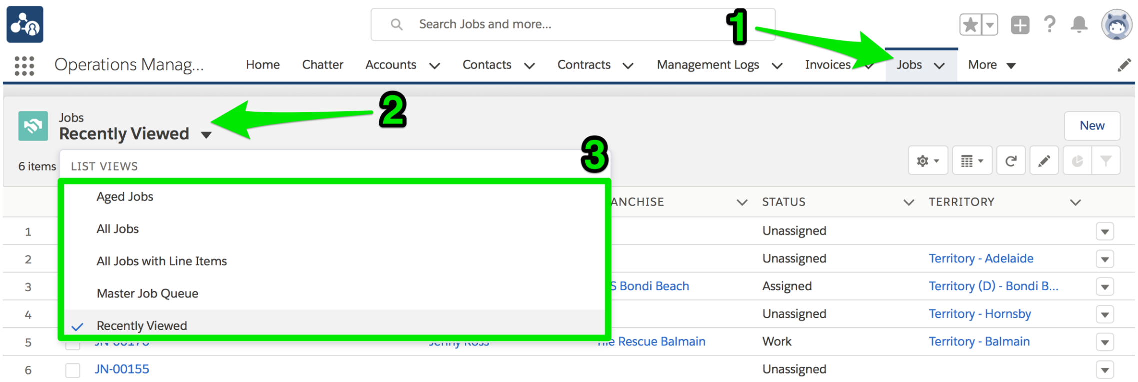
How to check for duplicate jobs

From time to time customers raise duplicate jobs within the system. The Job Allocation system checks for duplicate jobs. What counts as a duplicate job is configurable.

When a job fails a duplicate job check, the Job's `Substatus` field is set to *`On Hold`*. Jobs with the *`On Hold`* `Substatus` require a manual check to see whether the job is actually a duplicate.

To check for duplicate jobs in the system

1. From the Salesforce **Jobs** menu, look for a list view named **Jobs On Hold**.



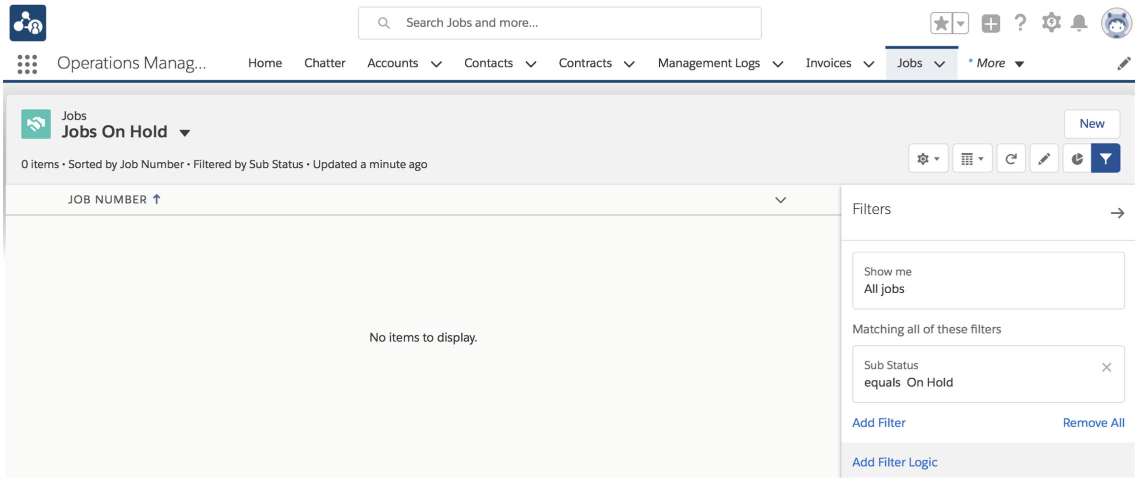
> It is possible you don't have a **Jobs On Hold** list view.

2. If you find the **Jobs On Hold** list view, select it. You will need to examine jobs in on this list to see whether they are duplicate jobs.
3. If you do not find the **Jobs On Hold** list view, you will need to create it.

To create the Jobs On Hold list view

1. Follow the instructions for creating a custom list view. *See* "How to create your own list view" on page 18.

2. When choosing filters for the list view, make them `Show All Jobs` where `Substatus` equals `On Hold`.



3. Add columns that you find useful. *See* "How to add columns to a list view" on page 21.
4. Share this list view so that everyone in your organization can see it. *See* "How to share list views" on page 24.

To deal with jobs flagged as duplicate

1. If a job is a duplicate, you may need to manually close the job. *See* "How to manually close a job" on page 165.
2. If a job is flagged as a duplicate because of spurious data (e.g. a regularly-used fake email address), amend the data and then restart the allocation process. *See* "How to restart job allocation" on page 154.
3. If you find a job is not a duplicate, you will need to manually allocate the job. *See* "How to manually allocate a job" on page 161.

How to check for unallocated jobs

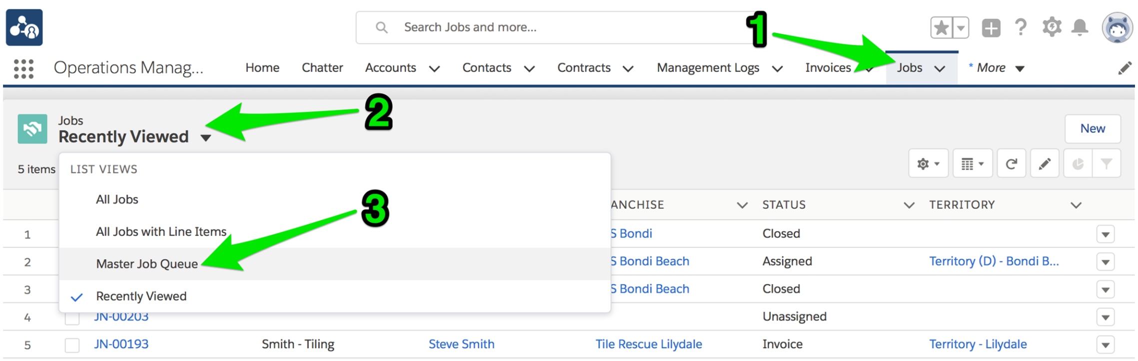
Jobs that cannot be allocated are assigned to your organization’s `Job Allocation Queue`.

> Each Master Franchise Profile Account has its own `Job Allocation Queue`. This is configured within the Master Franchise Profile Account’s **Configuration** record. Check with your system administrator if you are not sure of your organization’s `Job Allocation Queue Name`.

> In the procedure below, the system administrator has confirmed that the `Job Allocation Queue Name` is *`Master Job Queue`*.

To check for jobs assigned to the Job Allocation Queue

1. From the Salesforce **Jobs** menu, select the list view that matches your Master Franchise Profile Account’s `Job Allocation Queue Name`.



To deal with jobs assigned to the Job Allocation Queue

Jobs on this list require manual intervention. The interventions may consist of

- Editing the job address. *See* “What to do when the job address is not recognized” on page 151.
- Restarting job allocation. *See* “How to restart job allocation” on page 154.
- Force allocating the job. *See* “How to force allocate a job” on page 158.
- Manually allocating the job. *See* “How to manually allocate a job” on page 161.
- Manually closing the job. *See* “How to manually close a job” on page 165.

Why jobs have been assigned to the Job Allocation Queue

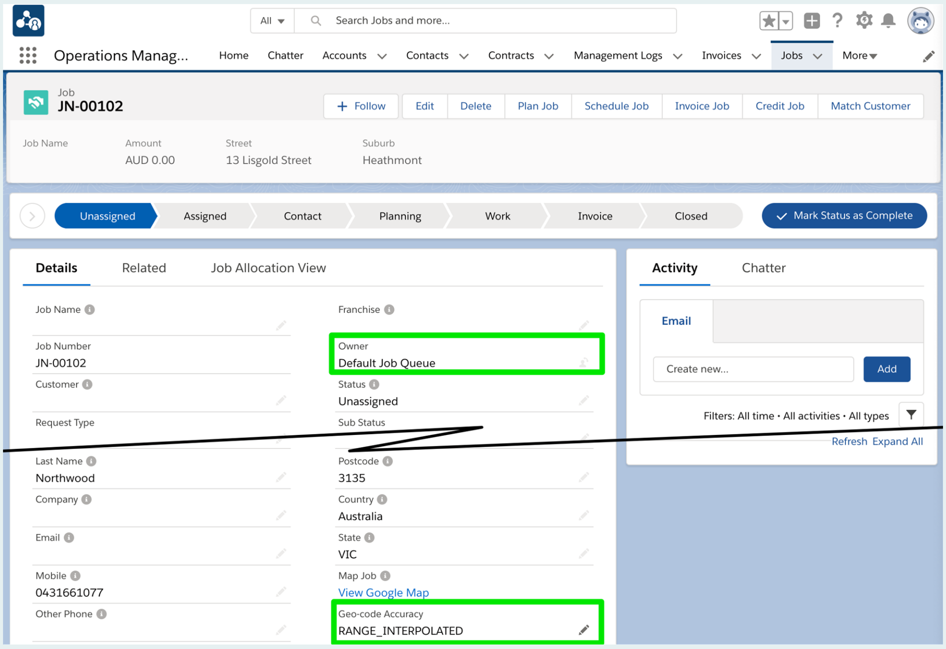
Jobs owned by the Job Allocation Queue were not able to be allocated automatically. They are placed in the Job Allocation Queue for manual review and intervention. Reasons for being placed in this queue may include

- The job was offered to one or more franchisees, but no franchisee accepted the job and the `Job Timeout` has been reached.
- The level of geocoding for the job address may not reach the minimum required levels for job allocation.
  - Addresses can be geocoded at different levels of accuracy. It is possible that the given job address was not able to be geocoded to the level of accuracy required by either the Franchise Profile Account's `Geo-code Accuracy` or the Master Franchise Profile Account's **Configuration** record's `Geo-coding Minimum Level`.
- One or more Franchise Profile Accounts may be misconfigured.
  - The Franchise Profile Account may not be *`Active`* or its Contract not *`Activated`*.
  - The Franchise Profile Account's **Business Hours** may be missing or misconfigured.
  - The Franchise Profile Account may be set to `Territory only`, when the Job Address lies outside the owned territory.
  - The Job Address may be outside the `Max Travel Distance` from the `Travel Distance Origin`, or either field may not be set.
- The job address may not be inside any Territory associated with the Master Franchise Profile Account.

What to do when the job address is not recognized

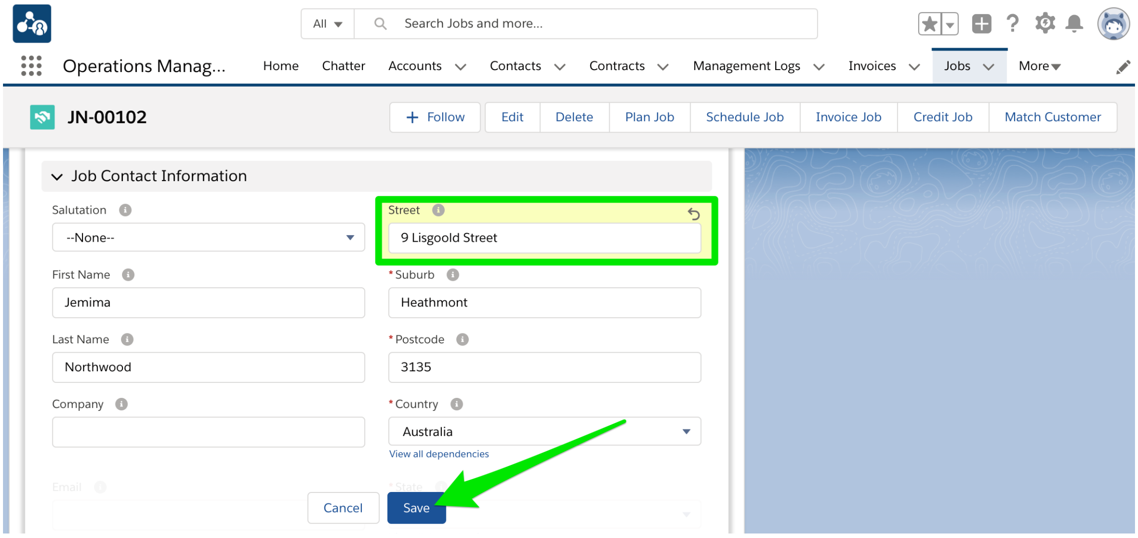
An incorrect job address may prevent the job from entering the job allocation process. Typically an incorrect job address will be geocoded to a standard insufficient to meet your organization's configured minimum geolocation level.

For example, when the geocoding minimum requirement is set to *ROOFTOP*, then any job geocoded to a level of *RANGE_INTERPOLATED* will be placed on the organization's configured Job Allocation Queue.



To remedy an incorrect or imprecise address

1. Edit the address.

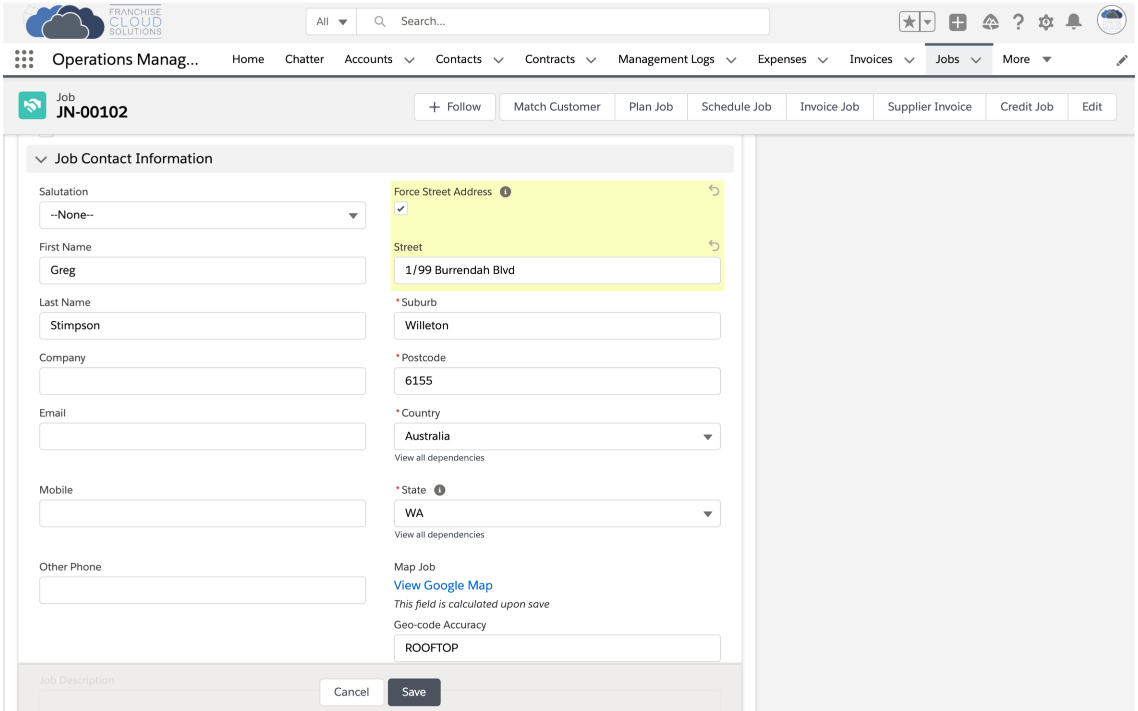


2. On amending the address, the job will re-enter the job allocation process.

> In relatively rare cases, the corrected job address may still not be recognized by Google Maps. When that happens, do the following.

To remedy an address not recognized by Google Maps

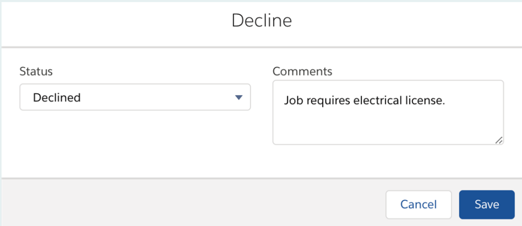
1. Edit the address to a form recognized by Google (e.g. you might change `1/99 Burrendah Blvd` to `99 Burrendah Blvd`).
2. Save the change. The system will enter job allocation.
3. Edit the Job record again. Check `Force Street Address` and amend the street address back to its correct form (e.g. `1/99 Burrendah Blvd`).



How to restart job allocation

There may be a need to restart job allocation. For example, when a job is assigned but then needs to be re-allocated, it is possible to restart the job allocation process.

Sometimes a franchisee may initially accept a job offer but then later decline it. After making contact with the customer, the franchisee may discover they are unqualified to deliver the required service. After they decline the job, you may choose to restart the job allocation service in order to offer it to another franchisee.

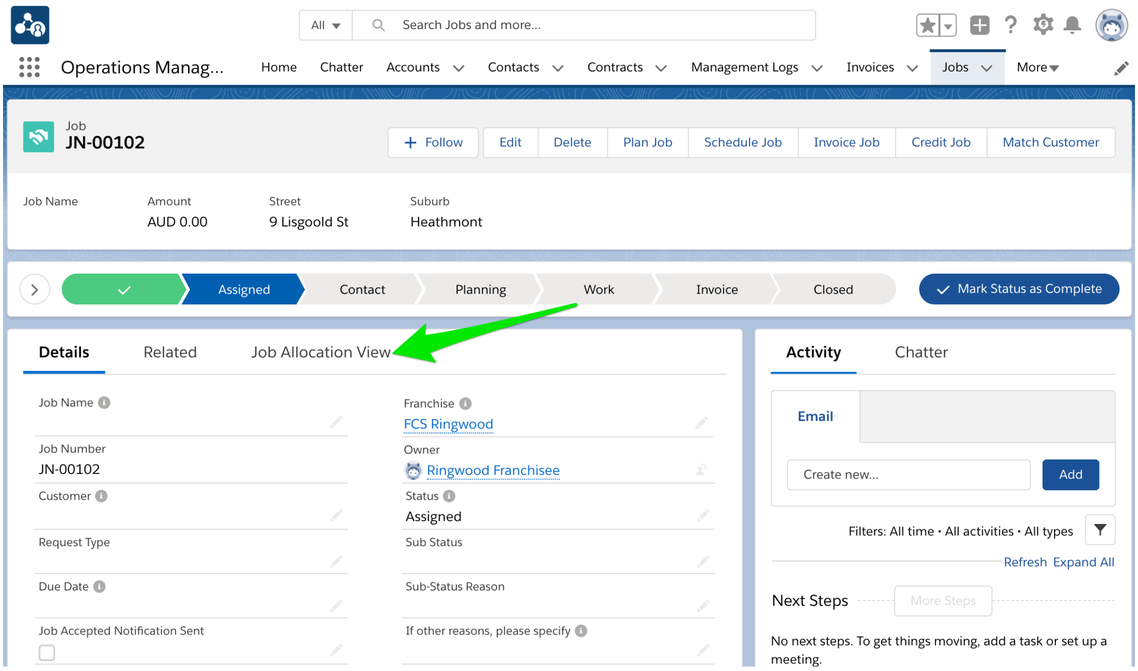


On restarting the job allocation process:

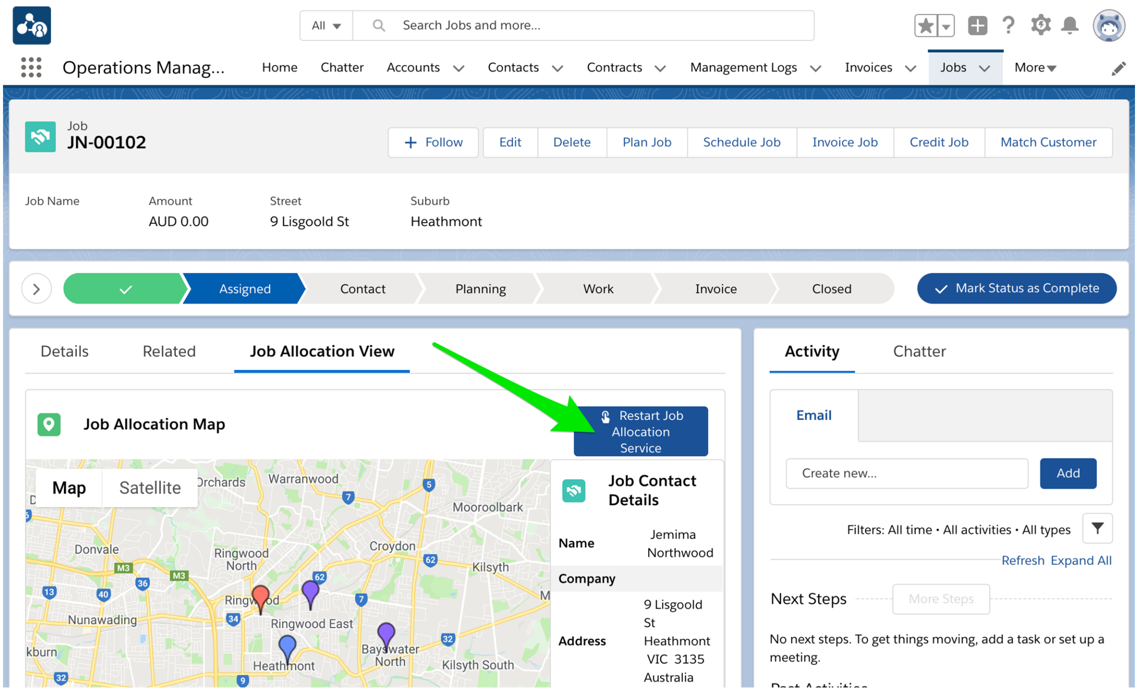
- If no job potentials have been created, the system creates job potentials.
- If job potentials do exist, the system resumes the process by offering it to the next-highest ranked job potential.

To restart the job allocation service

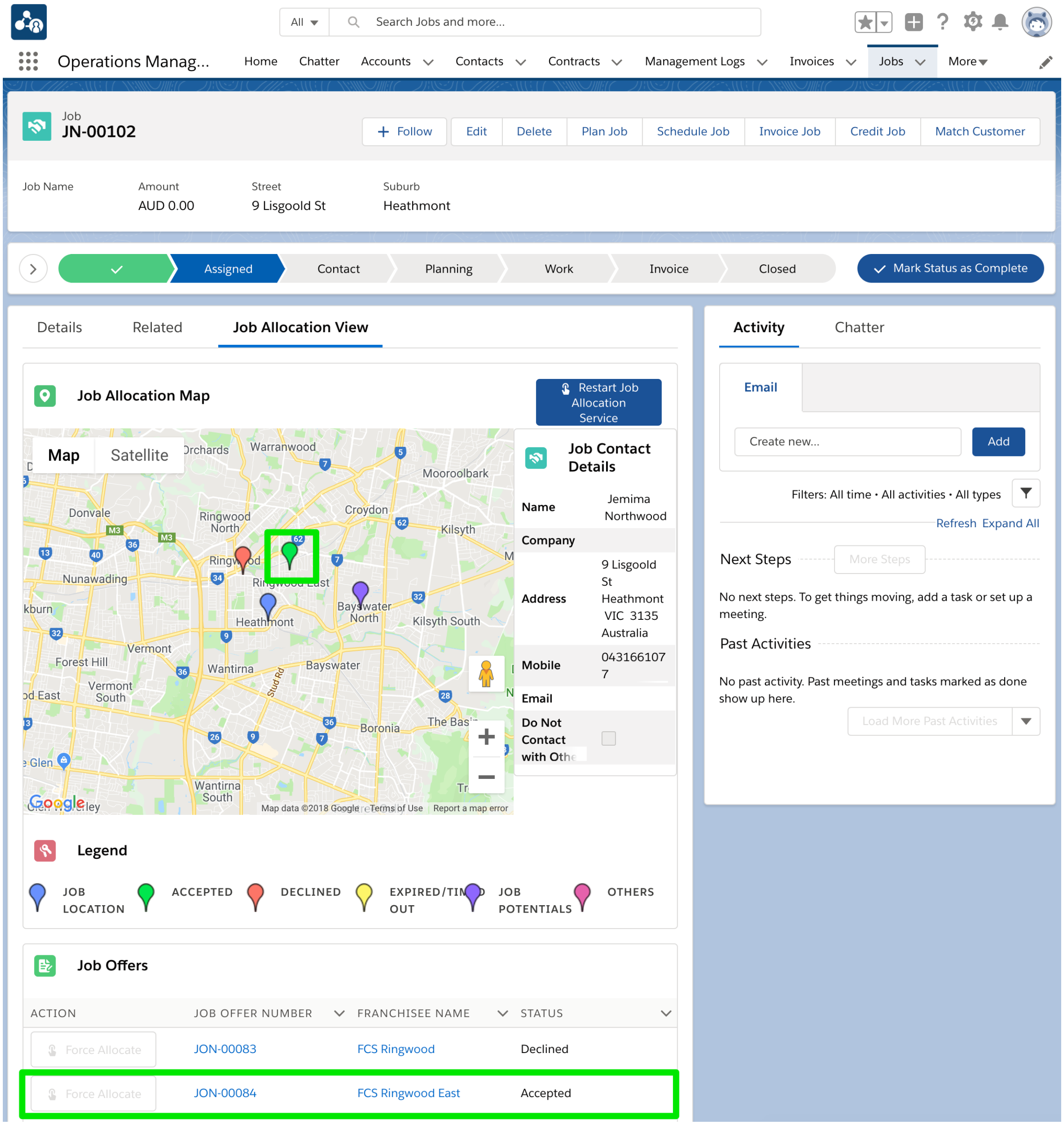
1. From the **Job**, select the **Job Allocation View**.



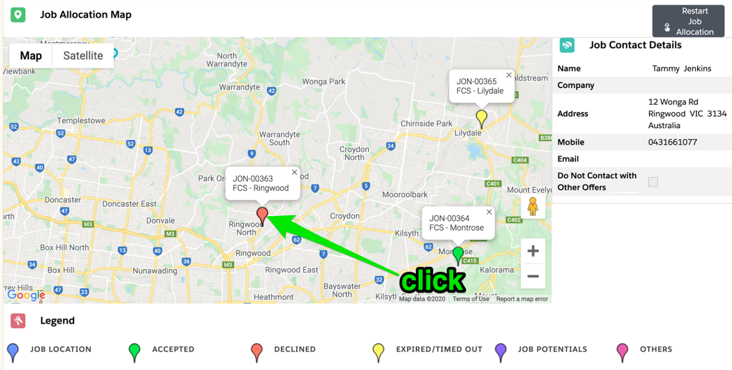
2. From the **Job Allocation View**, press **Restart Job Allocation Service**.



3. The job will now continue being allocated. To see the effect of this, refresh the page. You should see that job allocation has progressed.



To see the job offer detail, click on the pin to reveal the Job Offer Number and Franchisee name.



How to force allocate a job

When the job allocation system is unable to allocate a job, it is placed on the Master Franchise Profile's Job Allocation Queue.

> To find the Job Allocation Queue, *See* "How to check for unallocated jobs" on page 149.

Sometimes a Job has been processed by the Job Allocation system and has not been assigned to a franchisee. In this case, manual processing is required.

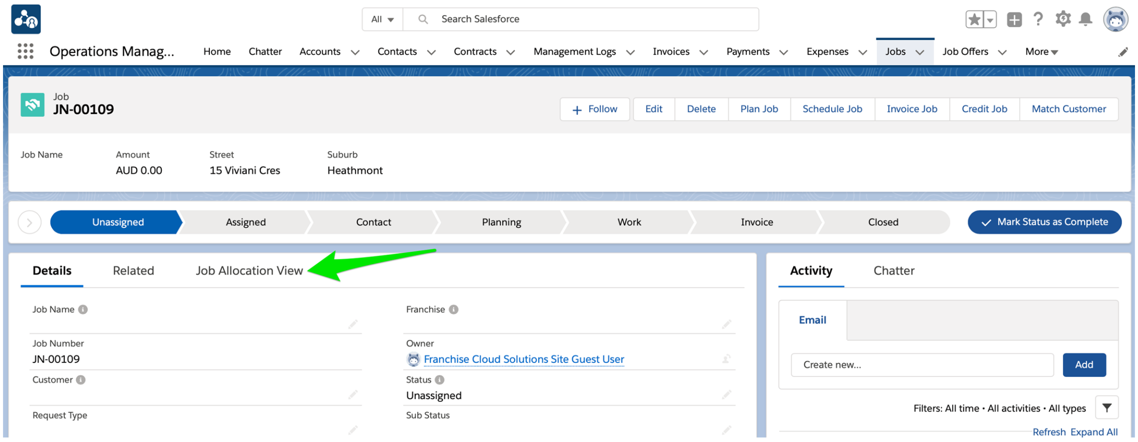
> For example, the `Job Time Out` has been reached without a franchisee accepting the Job.

The **Job Allocation View** allows you to **Force Allocate** a **Job** to one of the potential franchisees.

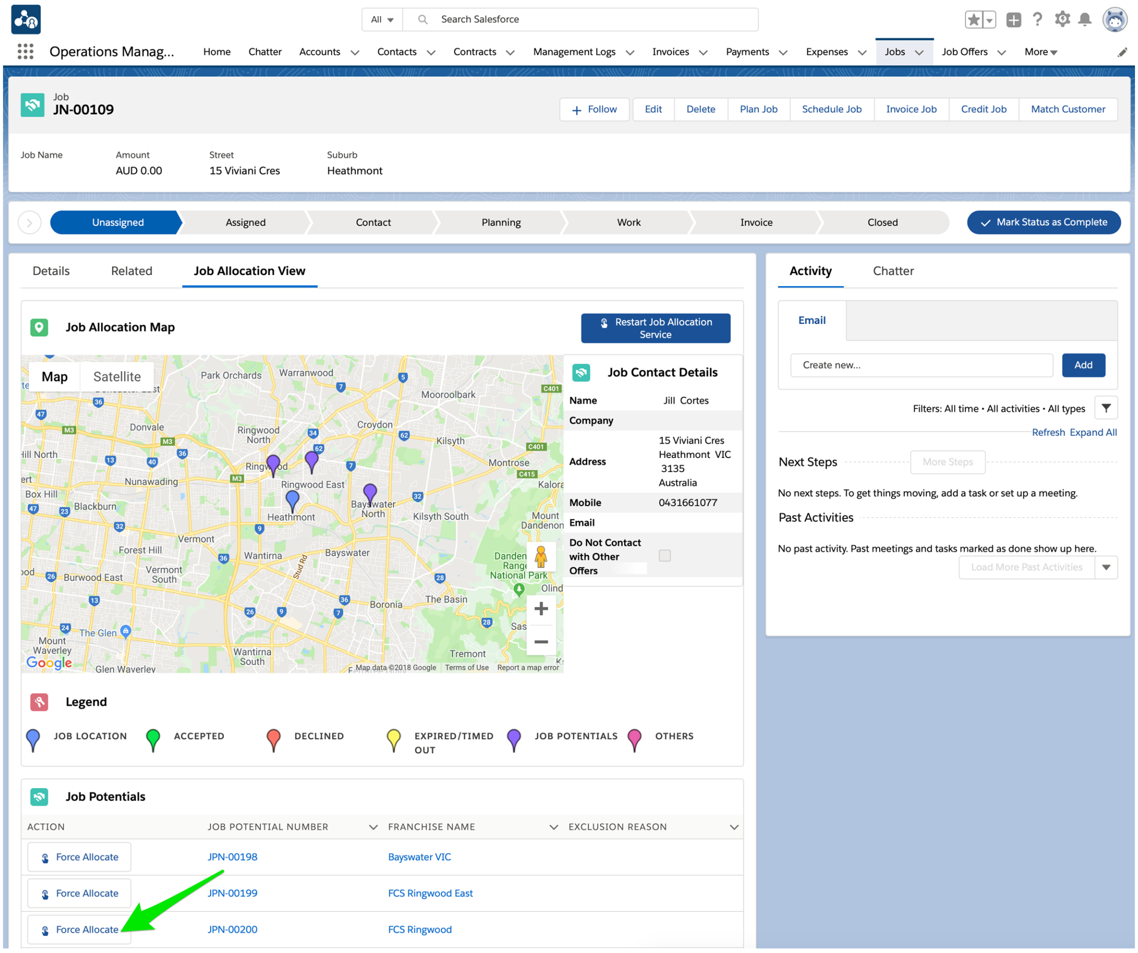
> You may only select between the franchisees that were initially considered potentials for the Job. If you need to allocate the Job to a franchisee other than one of the **Job Potentials**, then you need to assign the Job manually. *See* "How to manually allocate a job" on page 161.

To force allocate a Job to a franchisee

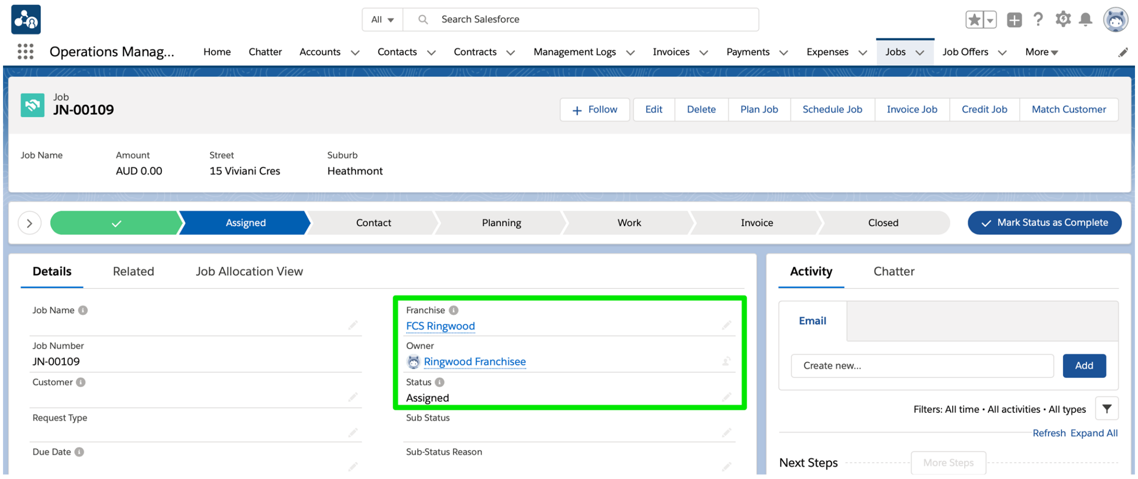
1. From the **Job**, select the **Job Allocation View**.



2. Press the selected Franchisee's **Force Allocate** button.



3. The **Job** is now assigned to the selected franchisee.



How to manually allocate a job

When the job allocation system is unable to allocate a job, it is placed on the Master Franchise Profile's Job Allocation Queue.

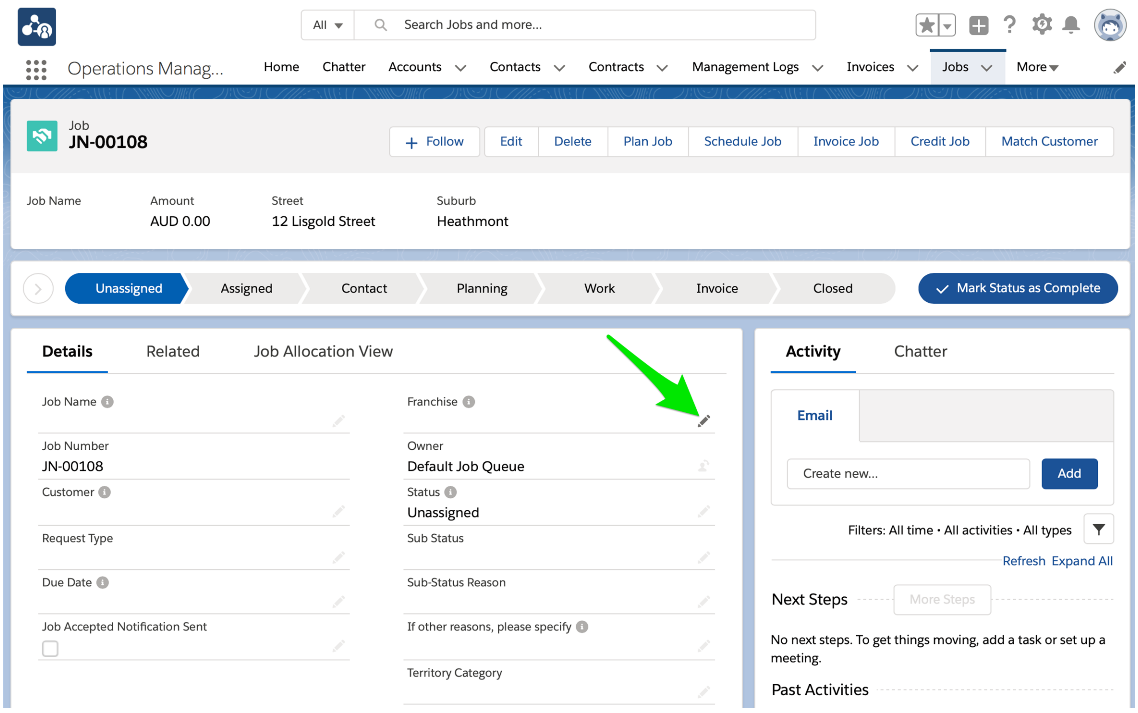
To find the Job Allocation Queue, *See* "How to check for unallocated jobs" on page 149.

Jobs owned by the Job Allocation Queue may need to be manually allocated if the intended franchisee is not listed as a Job Potential.

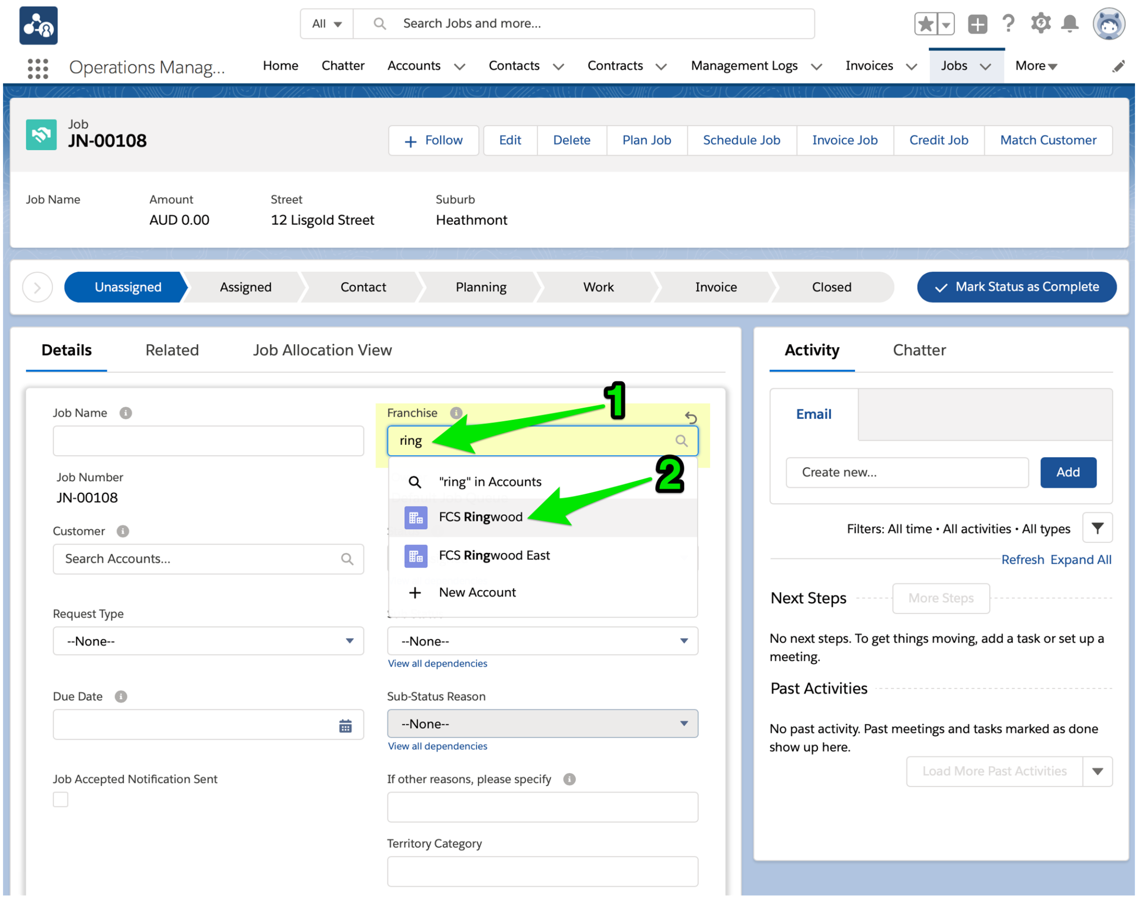
If the franchisee is listed as a Job Potential, *See* "How to force allocate a job" on page 158.

To manually allocate a job

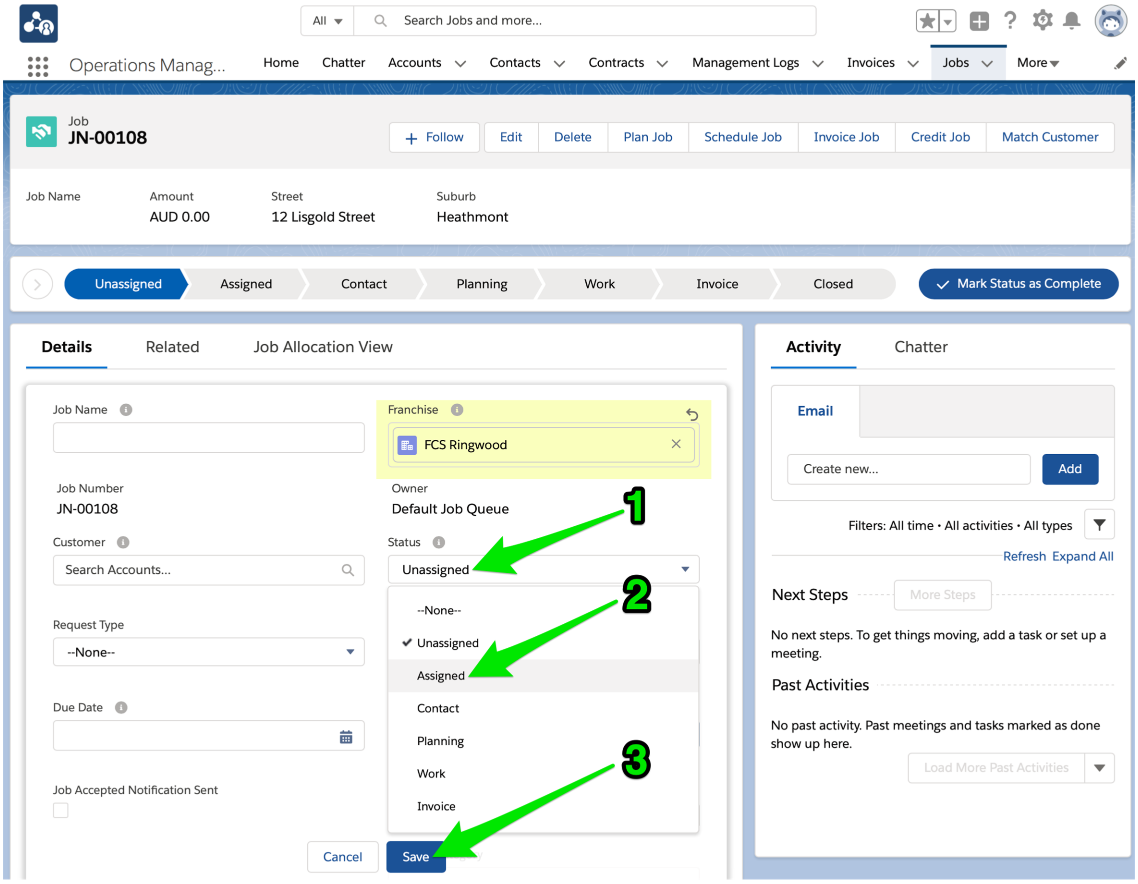
1. From the **Job**, press the **Edit** button.



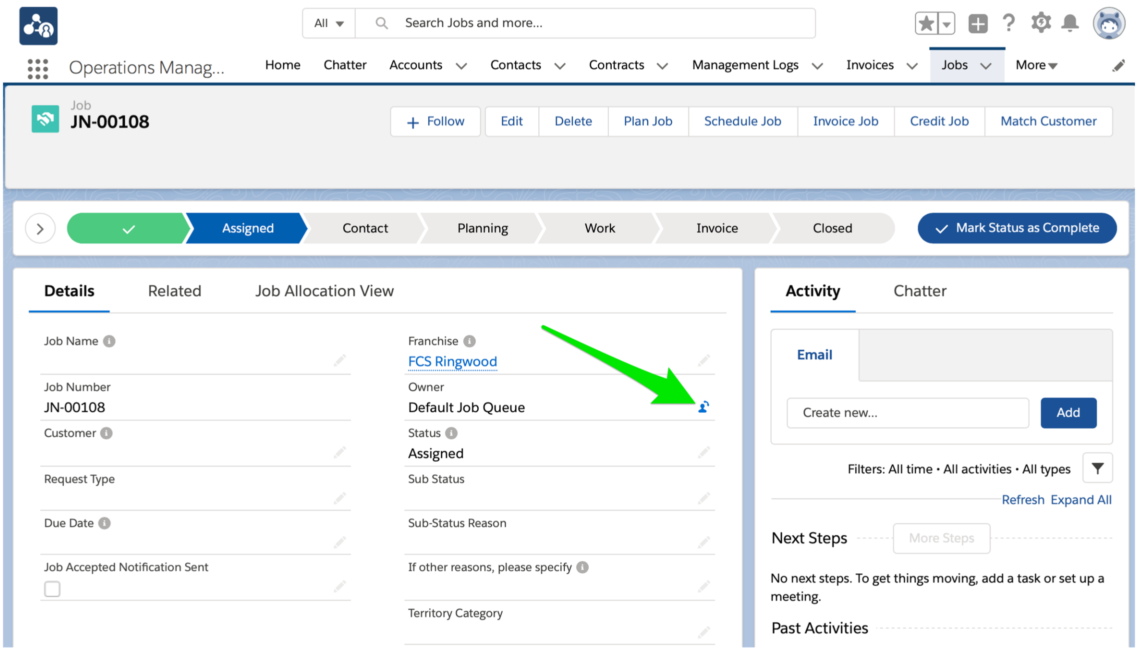
2. In the `Franchise` field, search for the franchise you wish to assign the job to.



3. Now change the `Status` to *`Assigned`*.

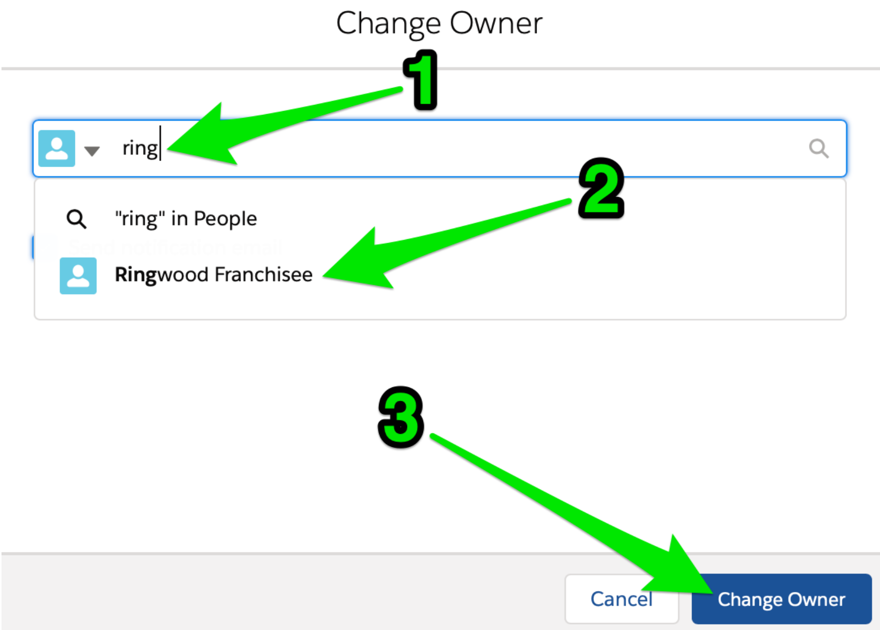


4. Now switch the owner.

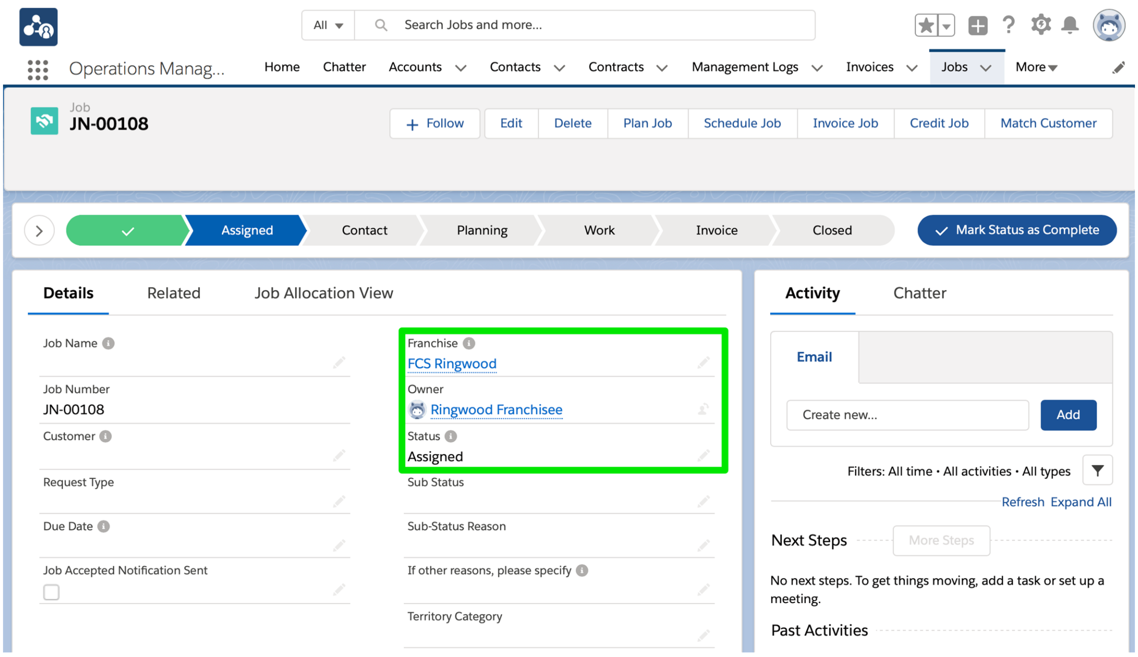


The **Change Owner** dialog box displays.

5. Select the responsible person associated with the `Franchise`, then press **Change Owner**.



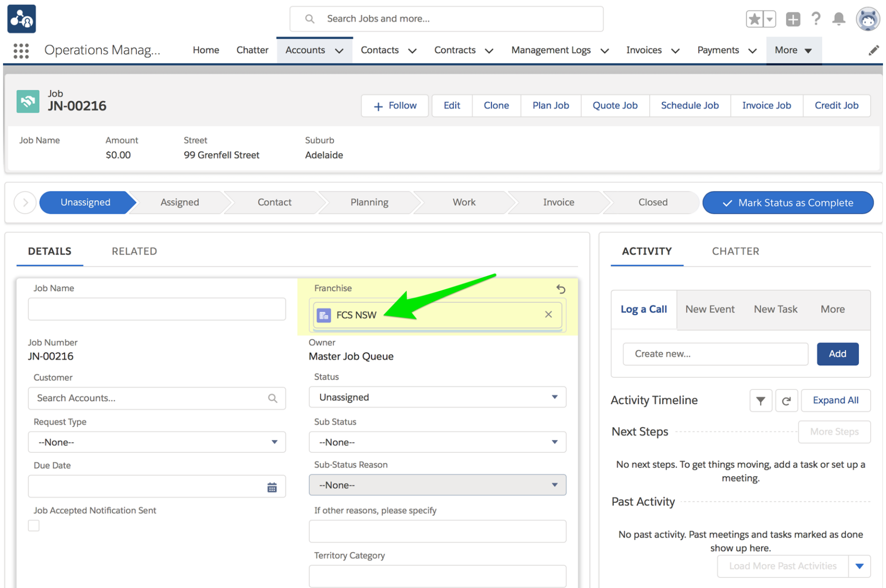
The job is now manually allocated.



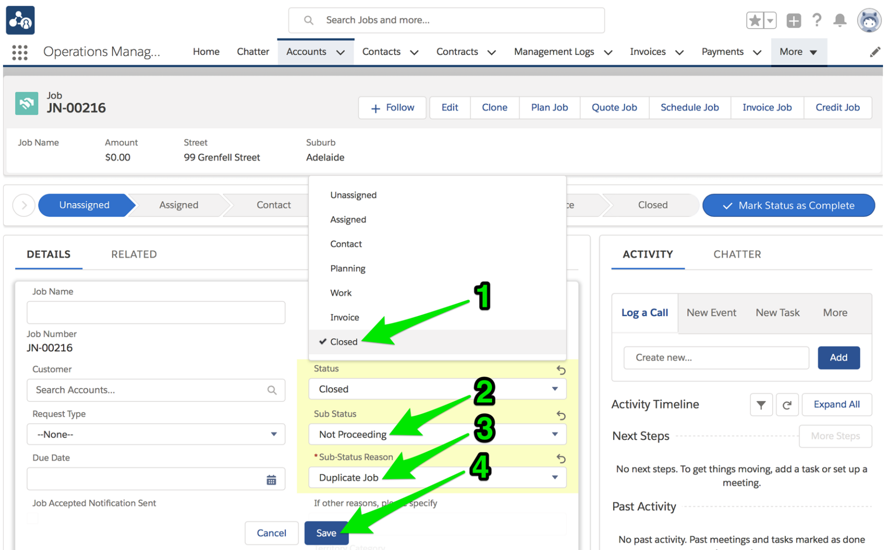
How to manually close a job

To manually close a job

1. Set the Franchise to be the Master Franchise.



2. Set the `Status` to *`Closed`* the `Substatus` to *`Not Proceeding`*, and select a `Sub-status Reason`, then press **Save**.



Troubleshooting job allocation

Troubleshooting can assist you in figuring out why a job has not been allocated when you expect that it should have. The basic process for troubleshooting is to identify where in the process the Job or Job Offer reached.

To understand the diagnostic procedures explained below, you need to have understood the topics in the following chapters:

» "Understanding Job Allocation" on page 119

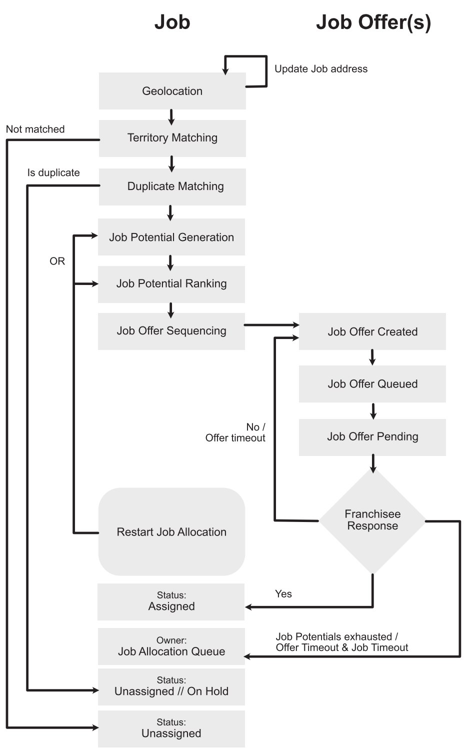
» "Managing Job Allocation" on page 143

Please ensure you read and understand these topics before attempting to follow the procedure below.

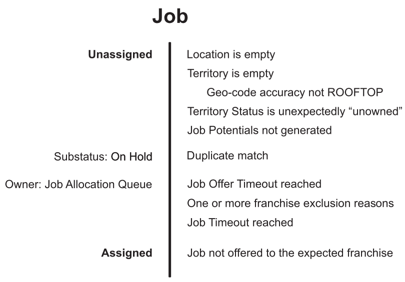
It will also help to study successfully allocated **Jobs** and **Job Offers** to familiarize yourself with the normal operation of the system.

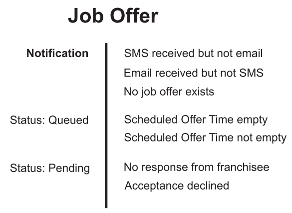
Allocation process

The normal process for Job Allocation follows this pattern.



You can use the following figure as a checklist to help you quickly diagnose what might have gone wrong with this particular job allocation.





Status: Unassigned

Any job whose `Status` is *`Unassigned`* when the `Owner` field is blank has not passed through job allocation. There are a variety of reasons why a job may not have entered job allocation. Work through the following headings to see whether any of these things may be true.

> A `Substatus` of *`In Allocation`* has recently been added to the *`Unassigned`* `Status`. *`In Allocation`* means that the job is currently being processed by the Job Allocation System.

Sub Status is ***`On Hold`***

This is a duplicate match.

See

» "How to check for duplicate jobs" on page 147.

Job potentials are not generated

On the **Job**, turn to the **Job Allocation View** tab. Are there **Job Offers** or **Job Potentials** listed beneath the Map. If there are none, the system was unable to match the job address with a Territory.

See

- “Location is empty” below
- “Territory is empty” below

Location is empty

On the **Job**’s **Details** tab, check the **Territory & Territory Location** section. If the `Location` field is empty, it means that the address was not able to be located.

- Is the job address blank?
- Is the job address misspelled?
- Can you locate the job address in Google Maps?

If yes

- *See* “What to do when the job address is not recognized” on page 151.

Territory is empty

On the **Job**’s **Details** tab, check the **Job Territory & Territory Location** section. If the `Territory` field is empty, it means that the system was unable to match the suburb and postcode against a predefined **Territory Location** belonging to an active **Territory**.

- Is the job address `Suburb` and `Postcode` entered correctly?
- Is there a **Territory Location** record with this exact combination of `Suburb` and `Postcode`?
- Is the **Territory Location** owned by a **Territory** that is `Active`?
- Does the active **Territory** belong to the correct **Master Franchise Profile** account?
- Double-check for duplicate **Territory** records.

If yes

1. Edit the job address, or
2. From the **Territory** record, check whether there is a **Territory Location** containing this combination of `Suburb` and `Postcode`. You may need to create a new one or correct an existing one (if it has the wrong detail).
3. Are there duplicate Territory records? If so, you may need to make one inactive and shift any **Territory Locations** to the correct **Territory** record.

4. Does the **Territory** record belong to the wrong **Master Franchise Profile**? If so, you may need to correct the `Master Franchise Profile` on the **Territory**.

Territory status is unexpectedly "unowned"

When you check the **Territory** `Status`, you see that it is owned; but when you check the **Job**'s `Territory Status` field, it says unowned.

» Is there a duplicate **Territory** record?

If yes

» You will want to eliminate the duplication. To do this, you may need to:

  » Make one of the **Territories** inactive (uncheck the `Active` checkbox).

  » If there are **Territory Locations** on the inactive **Territory**, consider whether they need to be reassigned to the `Active` **Territory**.

Job offers outstanding

Check the most recent Job Offer to check its Status. On the **Job**, choose the **Job Allocation View** tab. Click the most recent Job Offer Number (i.e. the one at the bottom).

» Is the `Status` *`Queued`*? If so, check the `Scheduled Offer Time` field.

  » Is `Scheduled Offer Time` empty? (The franchisee is the owner of the territory and has an outstanding offer.)

  » Does `Scheduled Offer Time` have a date and time? (The offer was made out of hours. It will be issued at the specified time.)

» Is the `Status` *`Pending`*? (Franchisee is yet to accept or reject the offer.)

» Is the `Status` *`Timed Out`*? (Franchisee did not respond within the `Offer Time Out`.)

Job owner is Job Allocation Queue

> The job allocation queue name is implementation-dependent. The name that appears as owner might be "Job Allocation Queue" or "Default Allocation Queue" or similar. Check with your system administrator if you are not sure.

Jobs that are owned by the Job Allocation Queue have passed through the Job Allocation process without being allocated. See why:

» On the **Job**'s **Job Allocation View** tab, check each **Job Offer**. Does each `Status` show *`Declined`* or *`Timed Out`*? (The job timed out.)

- If there are remaining **Job Potentials**, does each show an **Exclusion Reason**? (Job timed out and some of the job potentials were ineligible for the job.)
- If there are **Job Potentials** that have no `Exclusion Reason`, click on the last **Job Offer**'s `Job Offer Number`. Check the `Offer Time Out` field. Is the `Job Time Out` later than the `Offer Time Out`. (The offer timed out before it offered it to all potential franchisees.)

If yes

1. If there are unoffered job potentials, restart the job allocation system, *See* “How to restart job allocation” on page 154, or
2. Force allocate to a franchisee, *See* “How to force allocate a job” on page 158, or
3. Manually allocate the job, *See* “How to manually allocate a job” on page 161.

> To maintain quality of customer service, you may choose to call a franchisee and warn them that a job offer is coming that you would like them to accept. Doing this may prevent multiple cycles of declined or ignored jobs.

A franchisee is not receiving job offers

Is the franchisee being considered within the job potentials of recent job offers in or around their territory? Take a look at some recent jobs.

- If the franchisee appears on a **Job Potential** in **Job Allocation View**, is there an `Exclusion Reason`? (The exclusion reason will tell you why the franchisee is not receiving job offers.)
- Does the Job Allocation View show that the franchisee is being made an offer? (The issue is related to configuration of job offer notifications.)
  - Is the **Franchise Profile Account**'s `Notification Preference` set correctly?
  - Is a `Notification SMS` set?
  - Is there a `Notification Contact`?
  - Is the *`Notification Contact`*'s `Email Address` correct?

- If the franchisee is not appearing on any Job Potentials, check the setup of the **Franchise Profile Account**, the **Territory** and the **Territory Locations**.
  - Are there matching **Territory Location** records?
  - Is the **Territory** *`Active`*?
  - Is the **Franchise Profile Account** `Active`?
  - Does the `Franchise` listed on the **Territory** match the franchisee's Franchise Profile Account? Check for duplicate Territory or Franchise Profile Account records.

> For more information, *See* "How to configure a franchise profile for job allocation" on page 103.

No franchisees are receiving job offers via SMS

Check the status of your Twilio account. You may have an unpaid balance or a credit card that has expired.

SMS was received but no email

Check the **Franchise Profile Account**'s **Job Allocation Information** section.

- Does *`Email`* appear in the `Notification Preference` field?
- Is there a `Notification Contact`?
- Does the *`Notification Contact`* have a correct `Email address`?

If no

- Change the Notification Preference setting to include email and ensure the `Notification Contact` is set and has an `Email` address.

Email was received but no SMS

Check the **Franchise Profile Account**'s **Job Allocation Information** section.

- Does *`SMS`* appear in the `Notification Preference` field?
- Is the a `Notification SMS` set?

If no

- Change the Notification Preference setting to include SMS and ensure the `Notification SMS` is correct.

A job is allocated but no offer was received by the franchisee

Check the **Job**'s **System Information** section.

- Who created the job? (The job may have been created manually.)

A job was allocated to the wrong franchisee

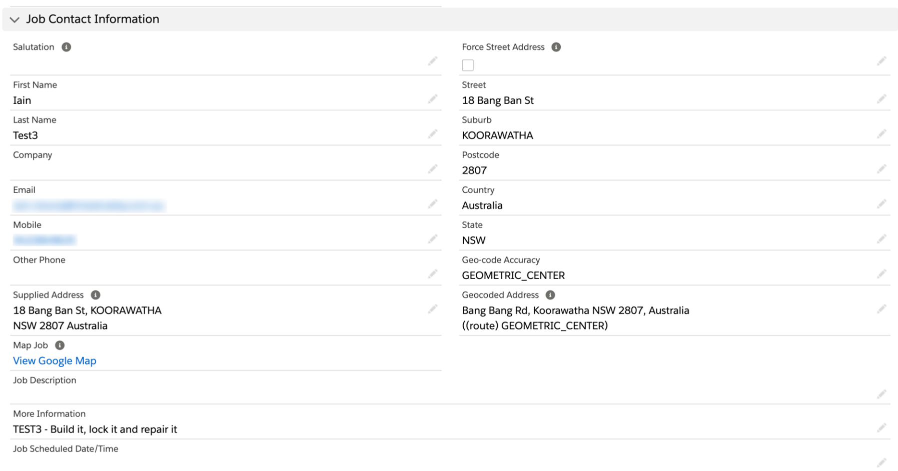
If a job is allocated to an unexpected franchisee, there are several factors that may be involved:

- Google may have matched the address to a different suburb
- A franchisee may be redirecting offers to a different franchisee
- **Territories** and **Territory Locations** may be misconfigured

Let's work through the above issues in turn.

Incorrect address

Occasionally, Google may match a supplied address to quite a different location. You can check that by comparing the `Supplied Address` field with the `Geocoded Address`. If the address has any significant difference, you may choose to correct the address. *See* "What to do when the job address is not recognized" on page 151.



Redirection

It is possible to transfer job offers to another franchisee. If this setting is configured, the job may end up with another franchisee. *See* "Temporary unavailability of franchisee" on page 111.

Misconfigured Territory Locations

If a Territory Location contains the suburb and postcode used in the address and is attached to the wrong Territory, this may cause the job to be allocated to an unintended franchisee. If this is the case, correct it by editing the `Territory` field on the **Territory Location** record.

> **Can't figure it out?**
>
> If you've worked through this troubleshooting topic and still can't figure out what is going on, feel free to open a support ticket with our Service Desk.

CHAPTER 6

Working with Management Logs

Understanding management logs

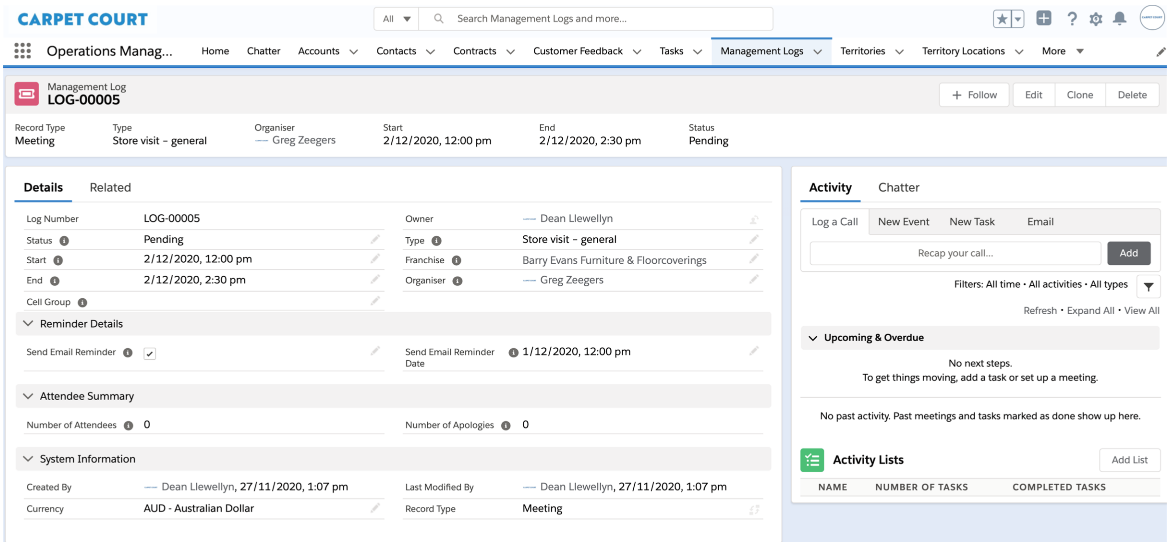
Management Logs provide franchisors the ability to keep detailed records of actions and notes regarding the performance of franchisees. Records entered under Management Logs are not visible to franchisees. Management Logs are especially useful for demonstrating compliance and supporting the franchisor in the case of disputes.

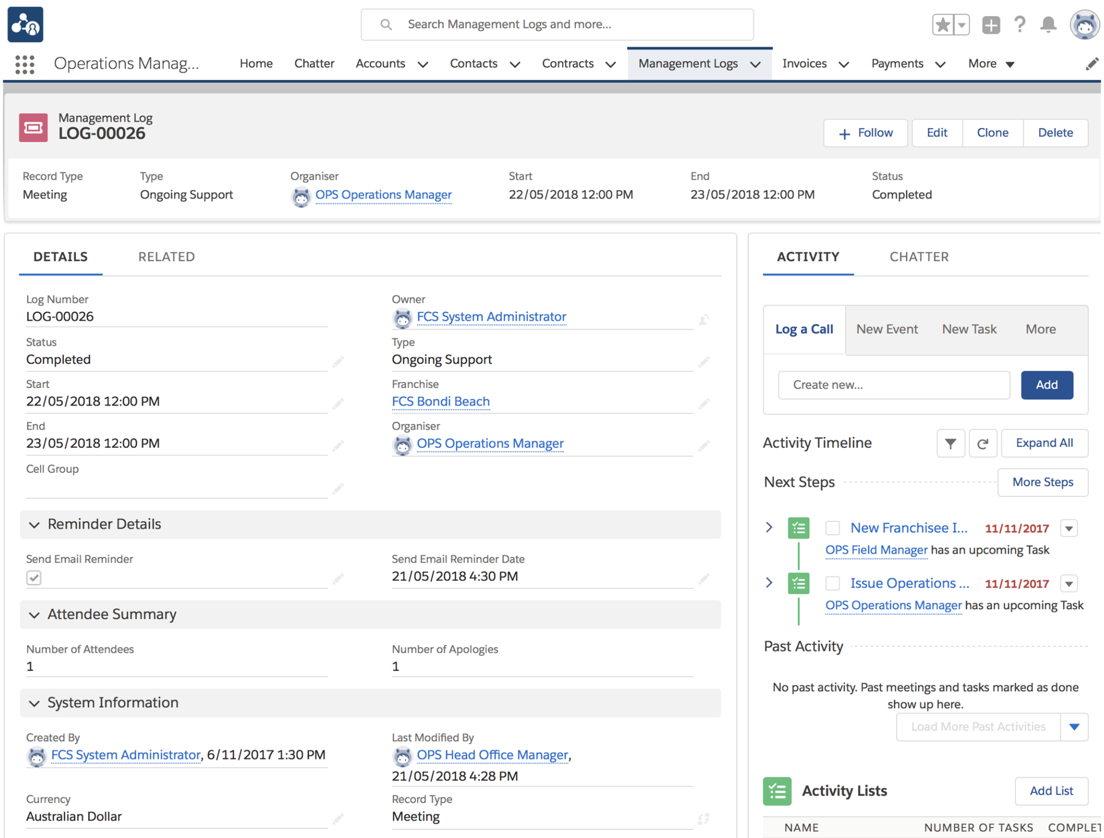
There are four types of management log records:

- Meeting
- Business Review
- Field Audit
- Induction

Meeting

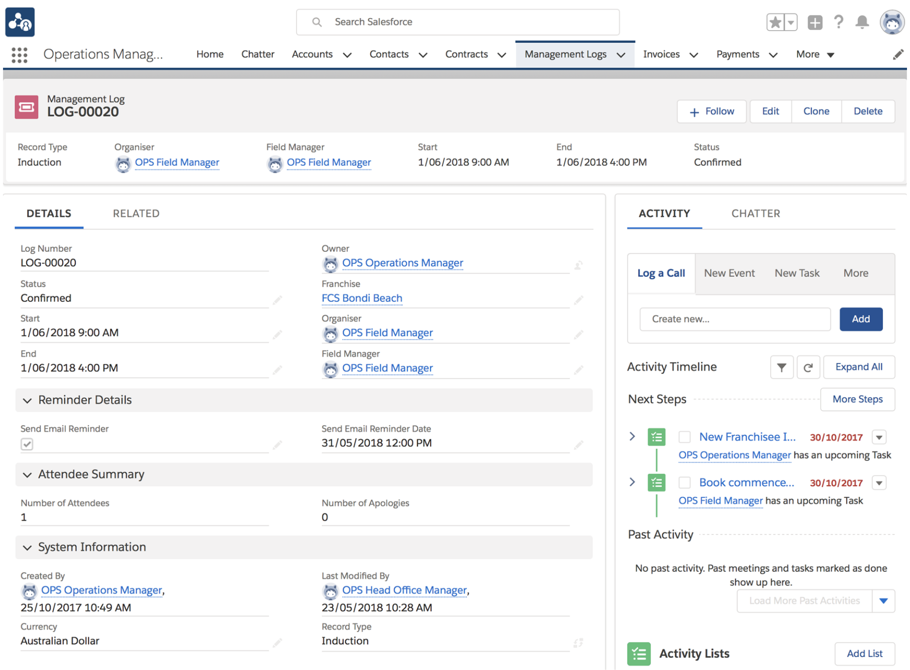
Use meetings to record any phone or in-person meeting with the franchisee or the franchisee's employees or contractors. Facilities to set a meeting; send meeting reminders; track invitees, attendees and apologies; and record meeting minutes are all built in.





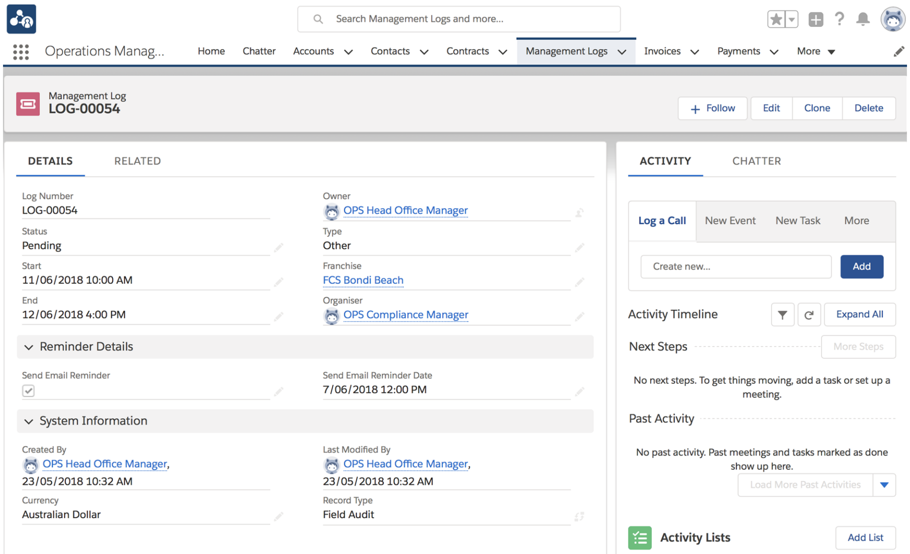
Induction

Inductions are particularly designed for training new contractors or employees of the franchisee. As with meetings, the Induction record provides a way to set a meeting; send meeting reminders; track invitees, attendees and apologies; and record meeting minutes.



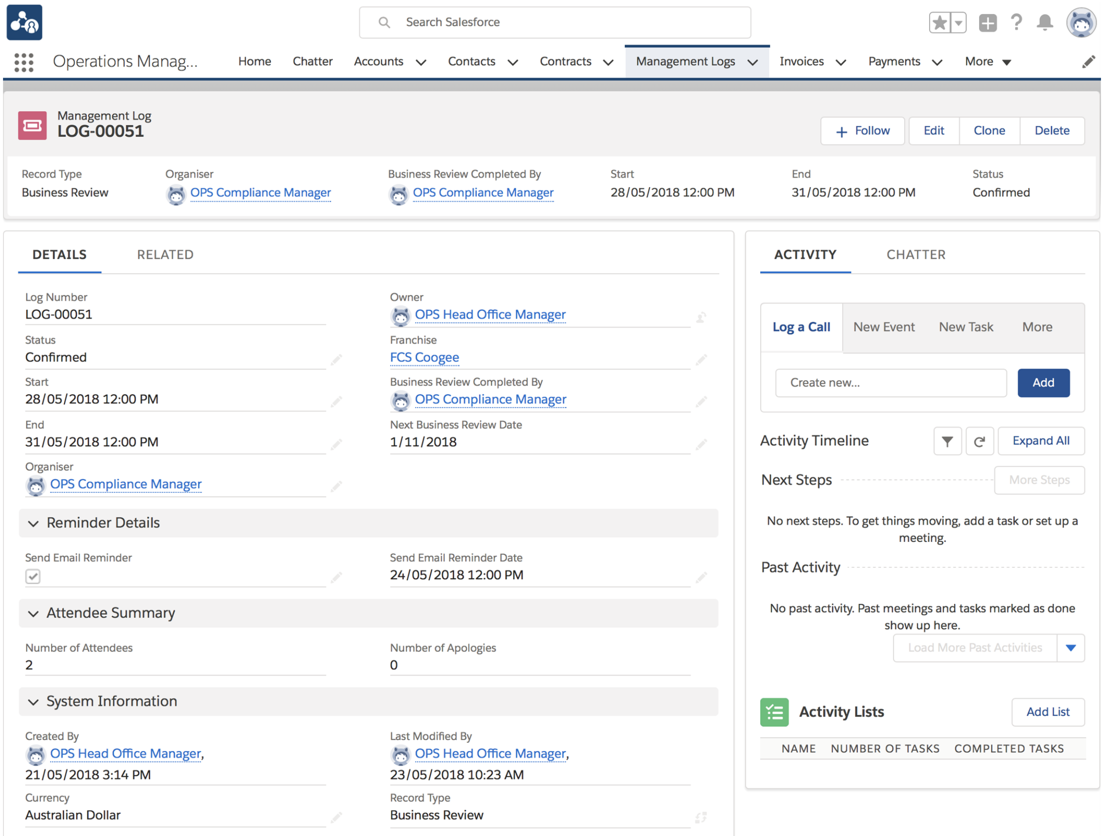
Field audit

Field audits allow a franchisor to send their Compliance Manager into the field to ensure franchisees meet the operating standards required of them. The Field Audit record provides a way to set a meeting; send meeting reminders; and record meeting minutes.



Business review

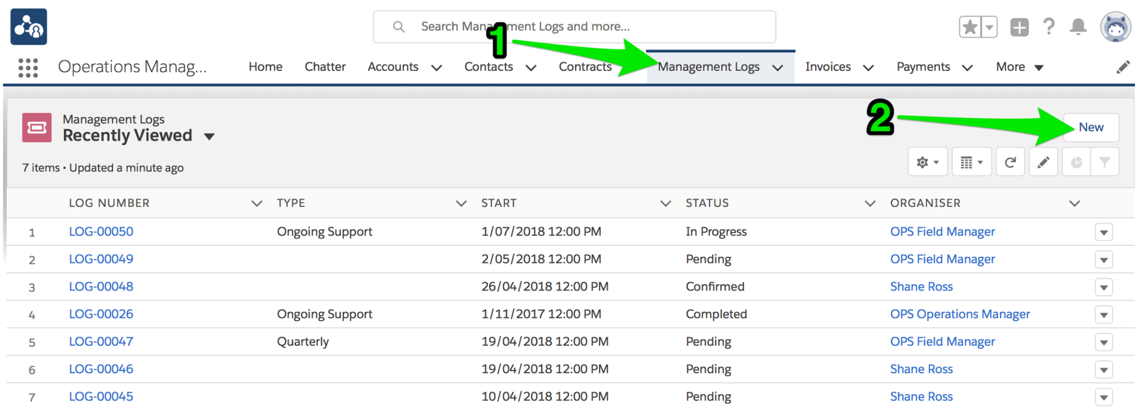
Business reviews are scheduled on a periodic basis. As with meetings, a Business Review record provides a way to set a meeting; send meeting reminders; track invitees, attendees and apologies; and record meeting minutes. You can plan for and schedule the next Business Review Date.



How to create a management log entry

To create a management log entry

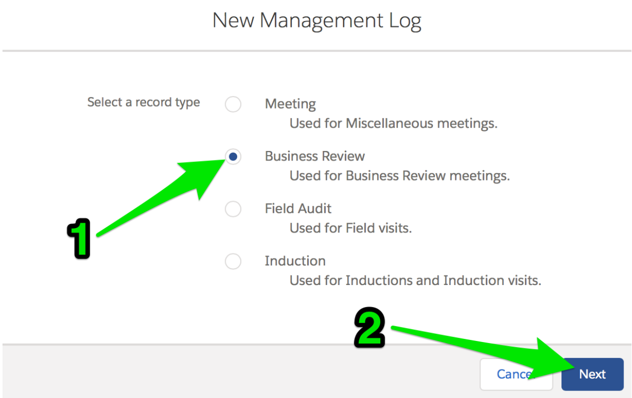
1. From the Salesforce **Management Logs** tab, press **New**.



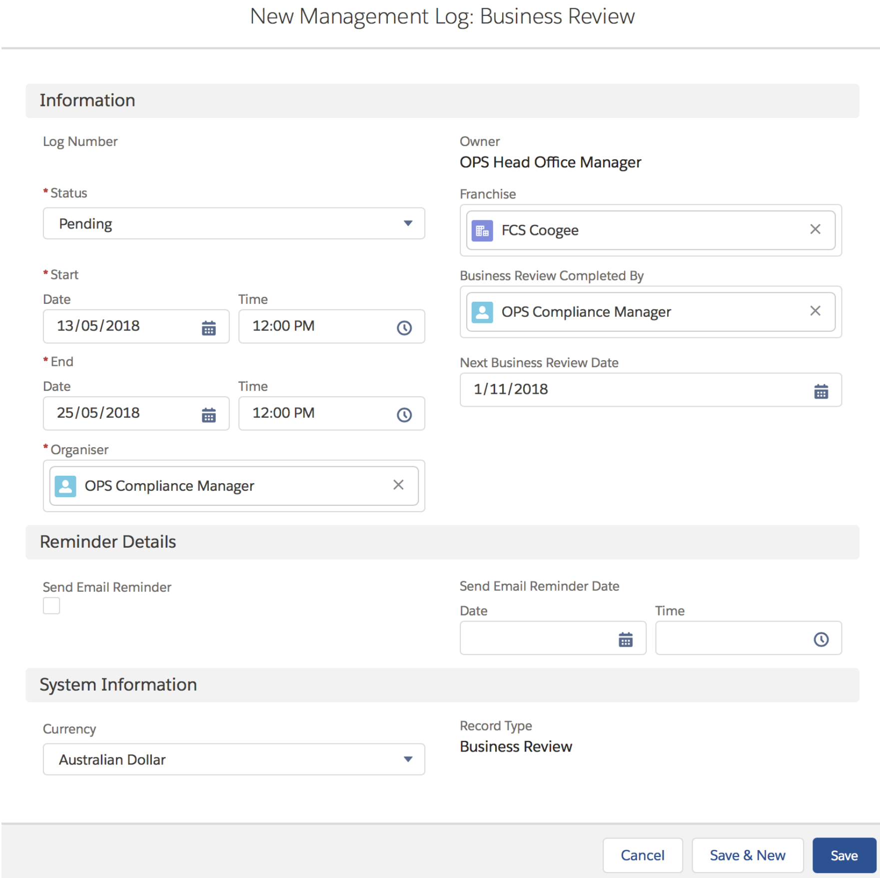
	LOG NUMBER	TYPE	START	STATUS	ORGANISER
1	LOG-00050	Ongoing Support	1/07/2018 12:00 PM	In Progress	OPS Field Manager
2	LOG-00049		2/05/2018 12:00 PM	Pending	OPS Field Manager
3	LOG-00048		26/04/2018 12:00 PM	Confirmed	Shane Ross
4	LOG-00026	Ongoing Support	1/11/2017 12:00 PM	Completed	OPS Operations Manager
5	LOG-00047	Quarterly	19/04/2018 12:00 PM	Pending	OPS Field Manager
6	LOG-00046		19/04/2018 12:00 PM	Pending	Shane Ross
7	LOG-00045		10/04/2018 12:00 PM	Pending	Shane Ross

The **New Management Log** dialog box appears.

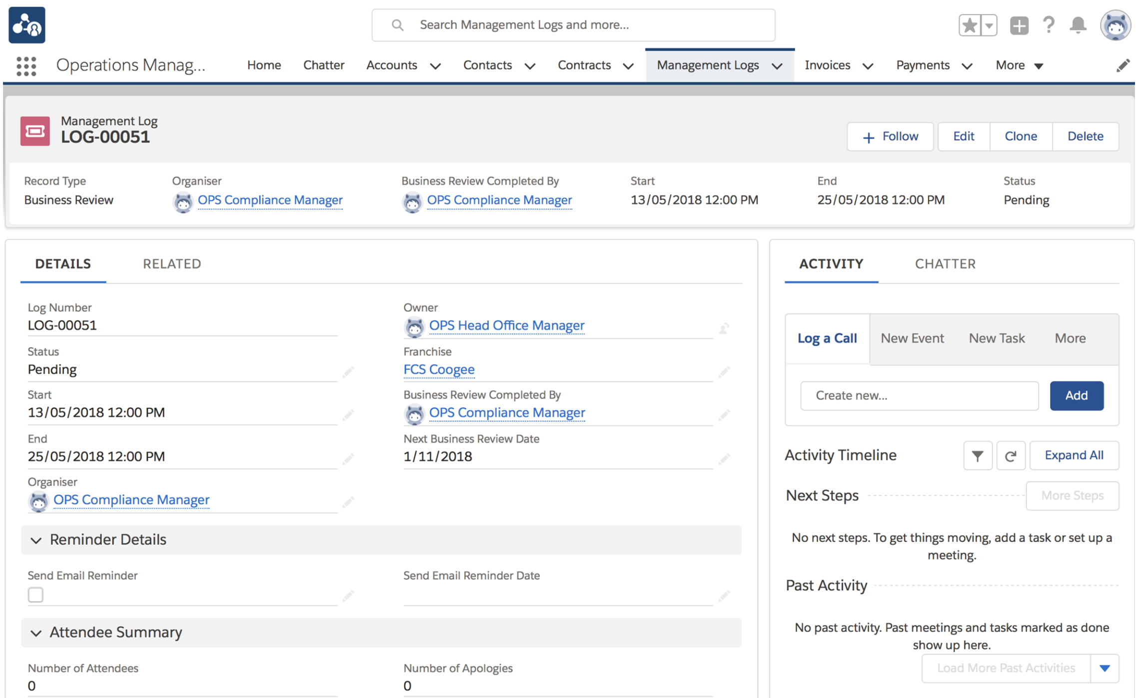
2. Select one of the management log types, then press **Next**.



3. Enter the **New Management Log** details, then press **Save**.



The **Management Log** entry displays.

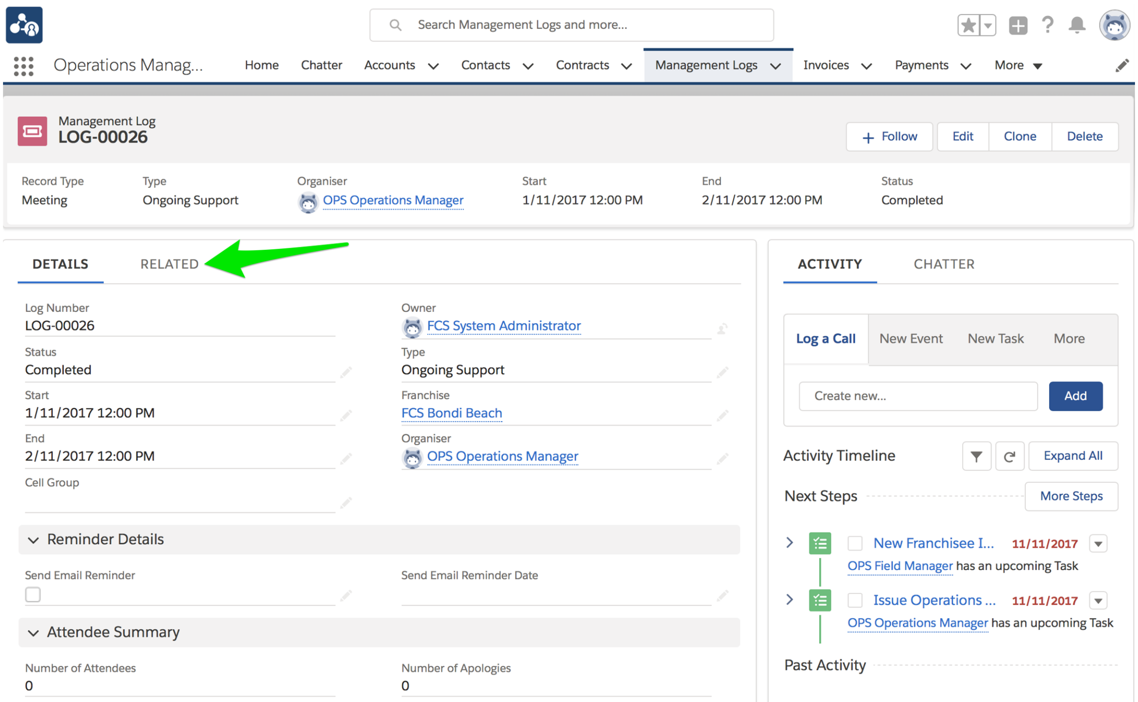


How to record attendees and apologies

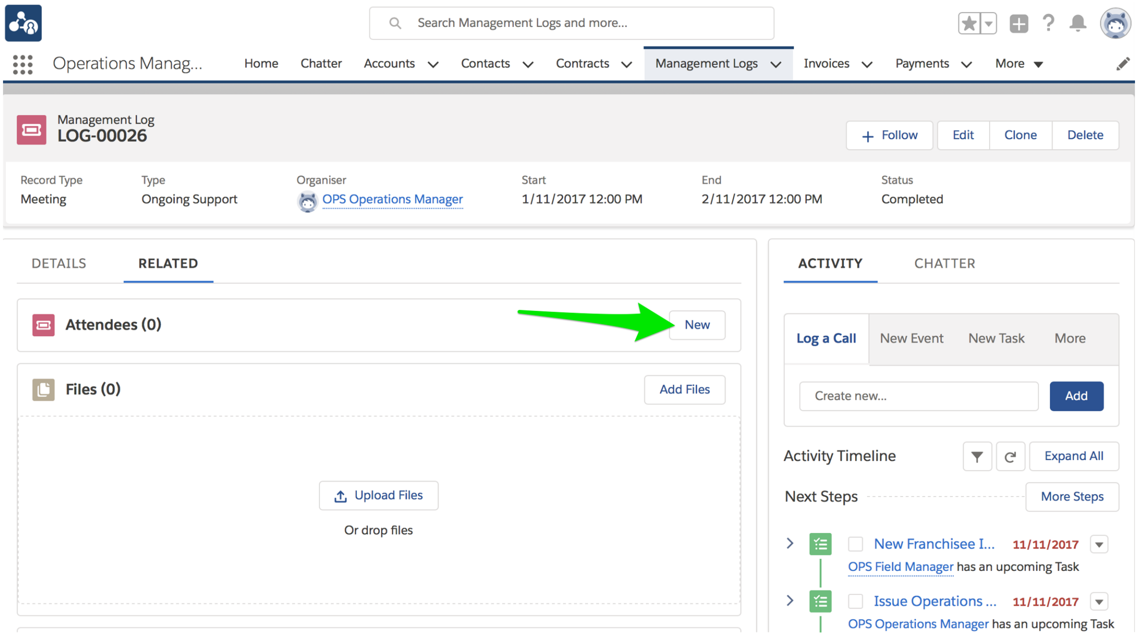
In cases where disputes have arisen with franchisees, it is often the case that key franchisee personnel have failed to attend critical inductions, trainings and meetings. You can keep track of the people invited to meetings as well as those attended.

To record attendees and apologies

1. From any management log entry, click the **Related** tab.

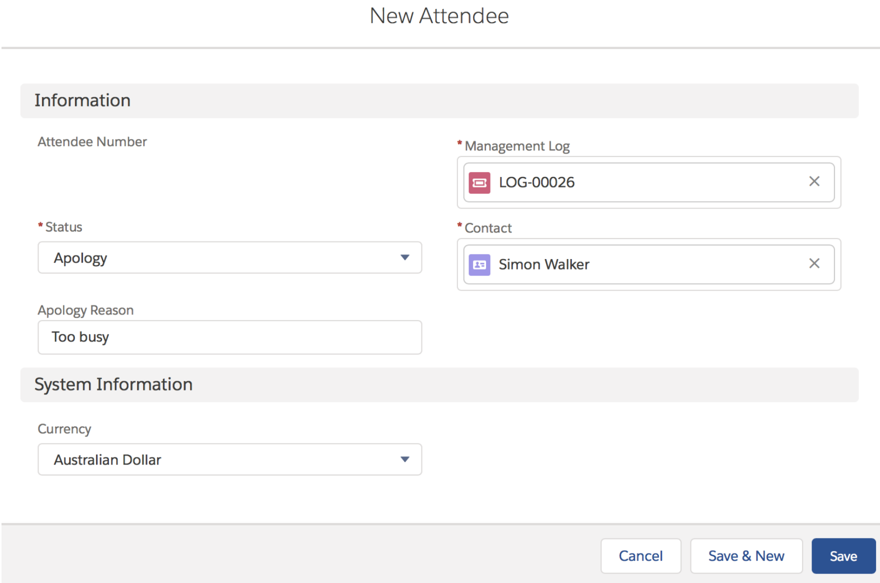


2. From the **Attendees** section, press **New**.

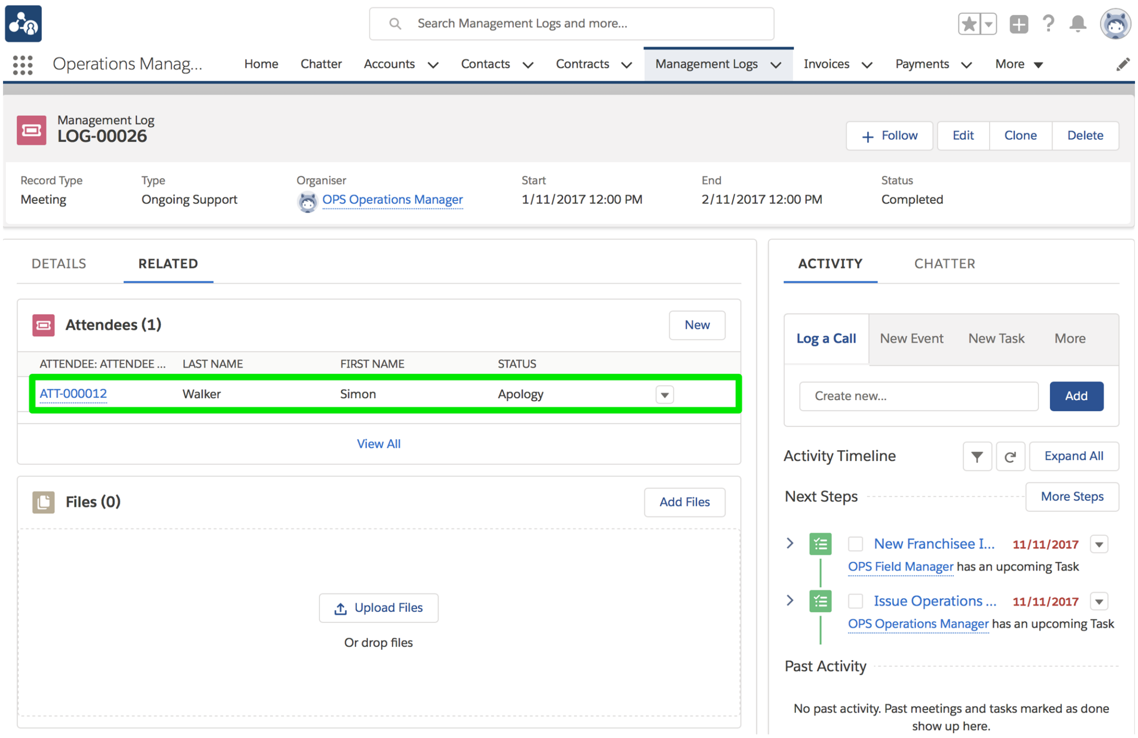


The **New Attendee** dialog box appears.

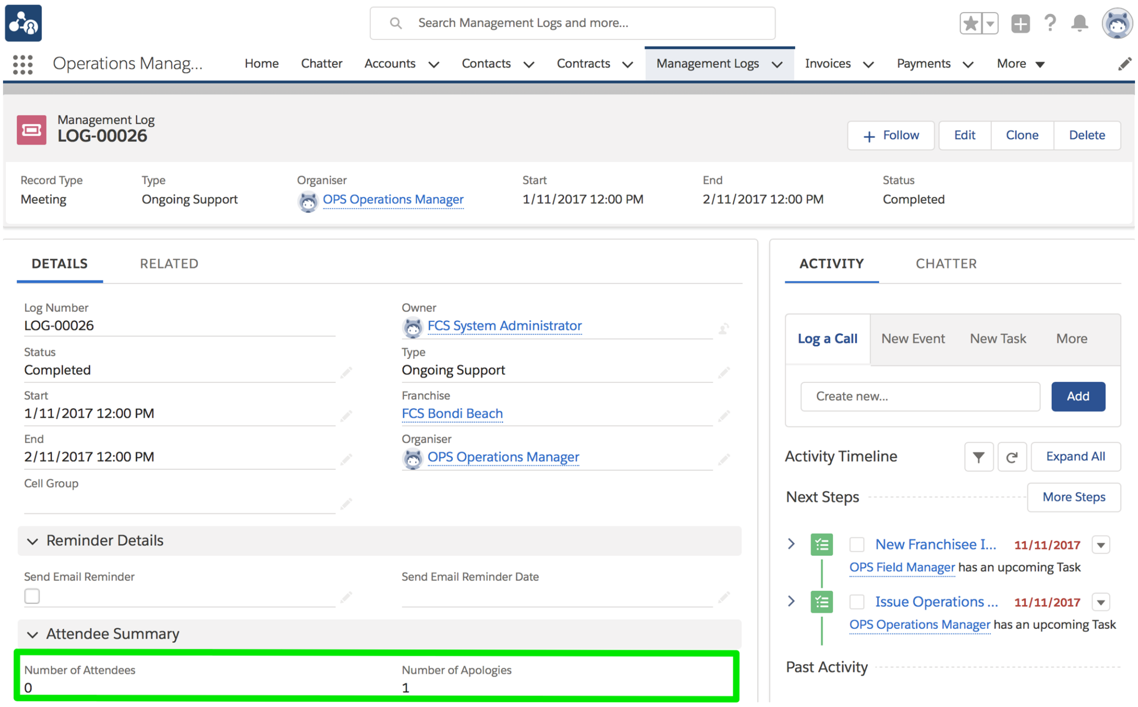
3. Enter the **New Attendee** details, then press **Save**.



The **Attendees** section is updated.



The **Attendee Summary** section of the **Management Log Details** page is also updated.

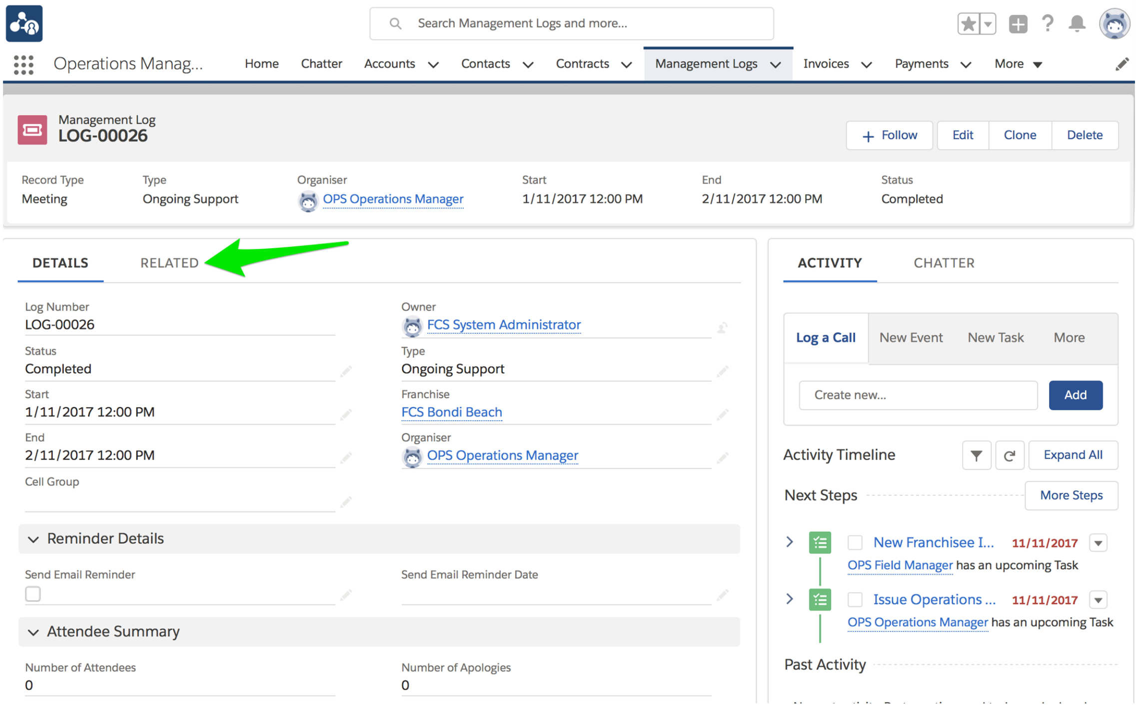


How to record meeting minutes

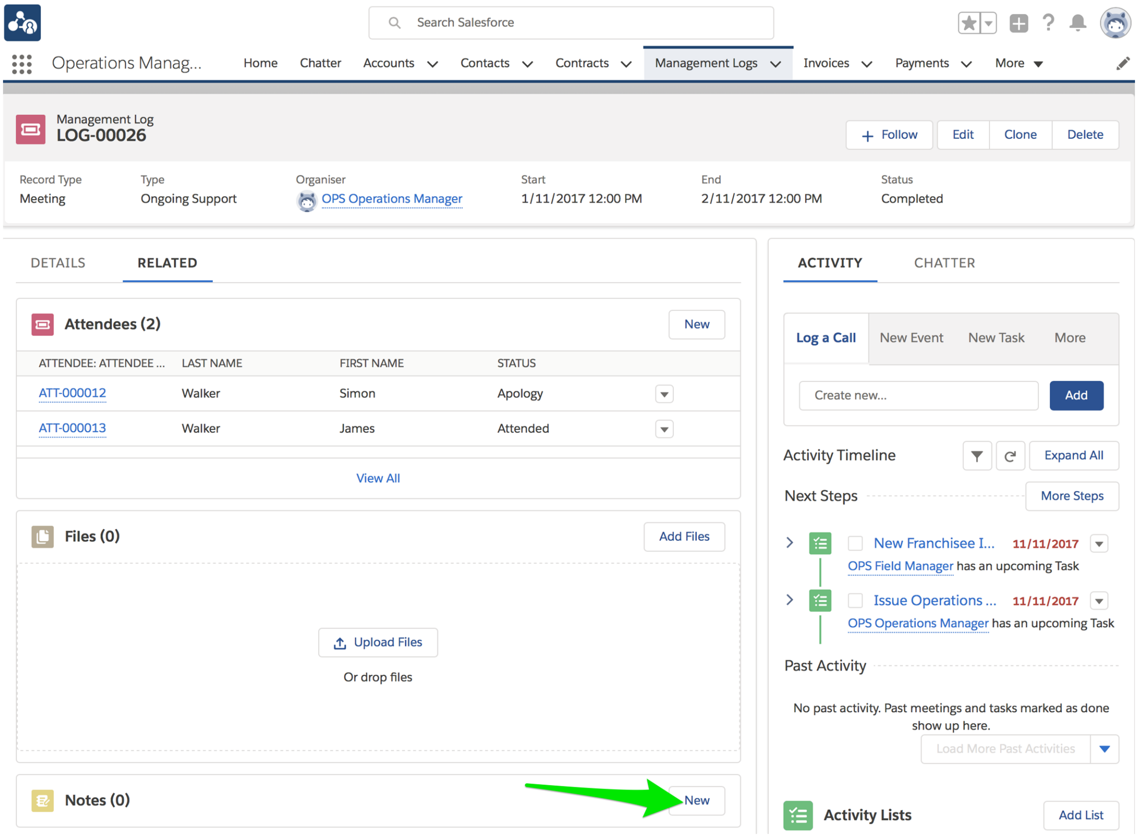
You can capture meeting minutes by creating meeting notes.

To capture and record meeting notes

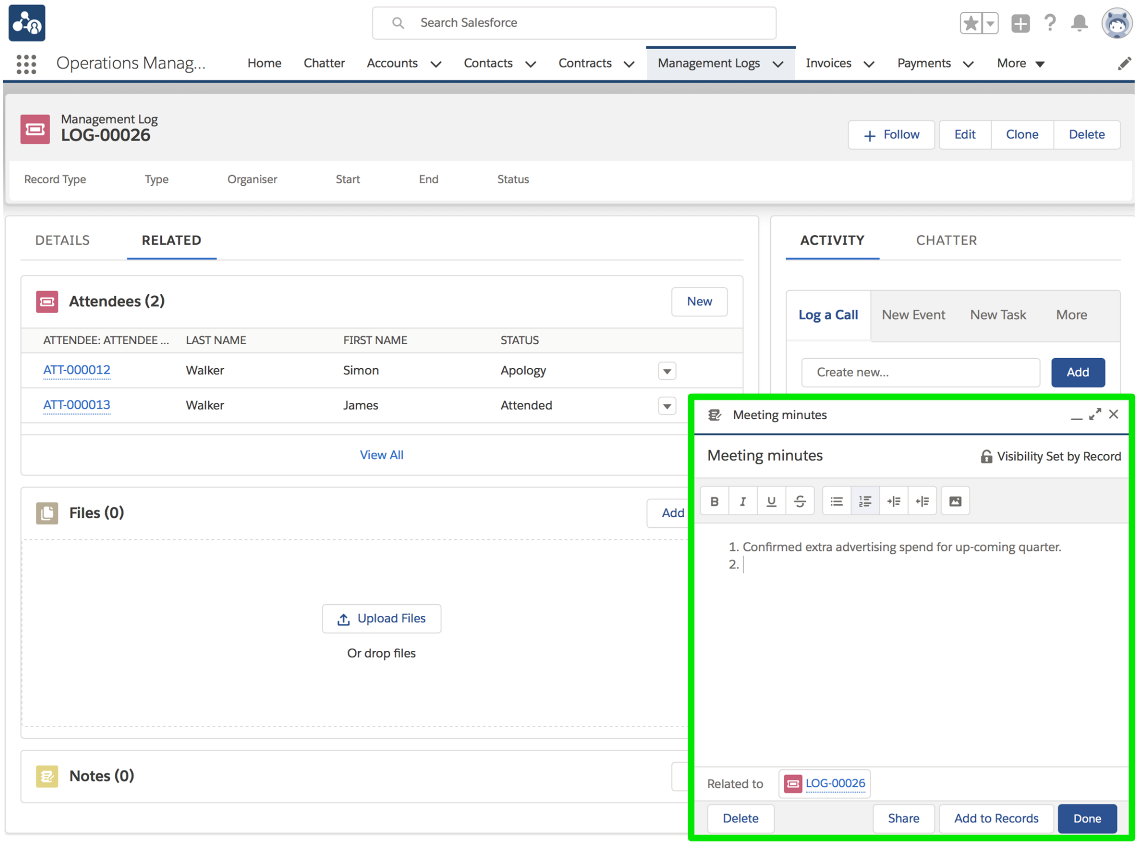
1. From any management log entry, click the **Related** tab.



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



The built-in notes editor displays.



> You can still click around in the window retrieving and reviewing information while the Notes editor is open.

3. When complete, press **Done**.

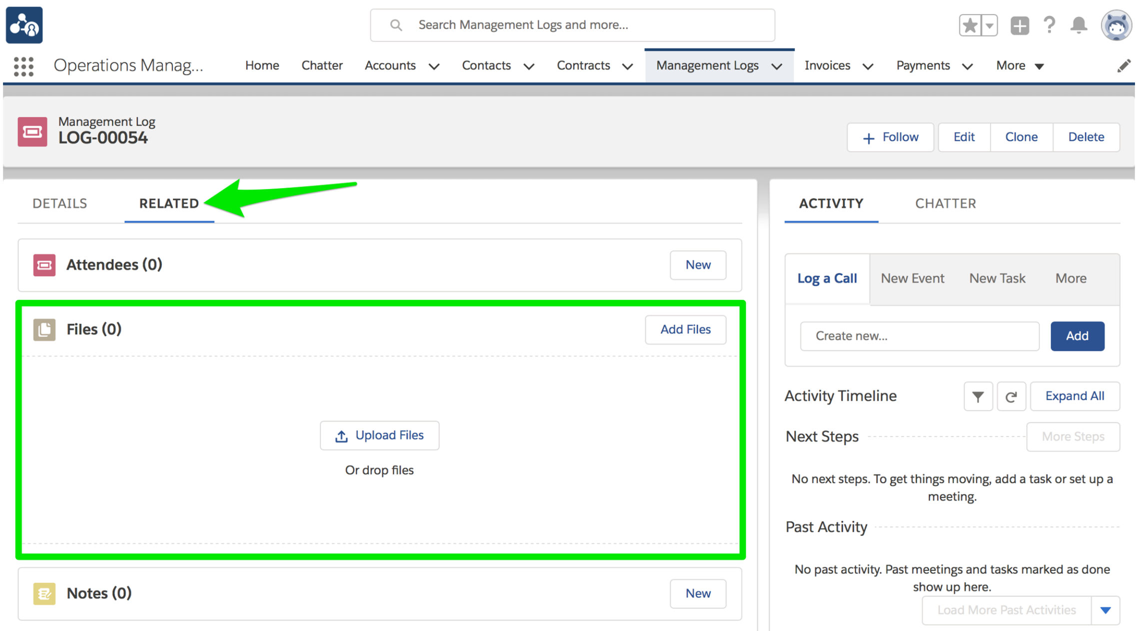
   The meeting minutes are displayed in the **Notes** section.

How to record supporting evidence

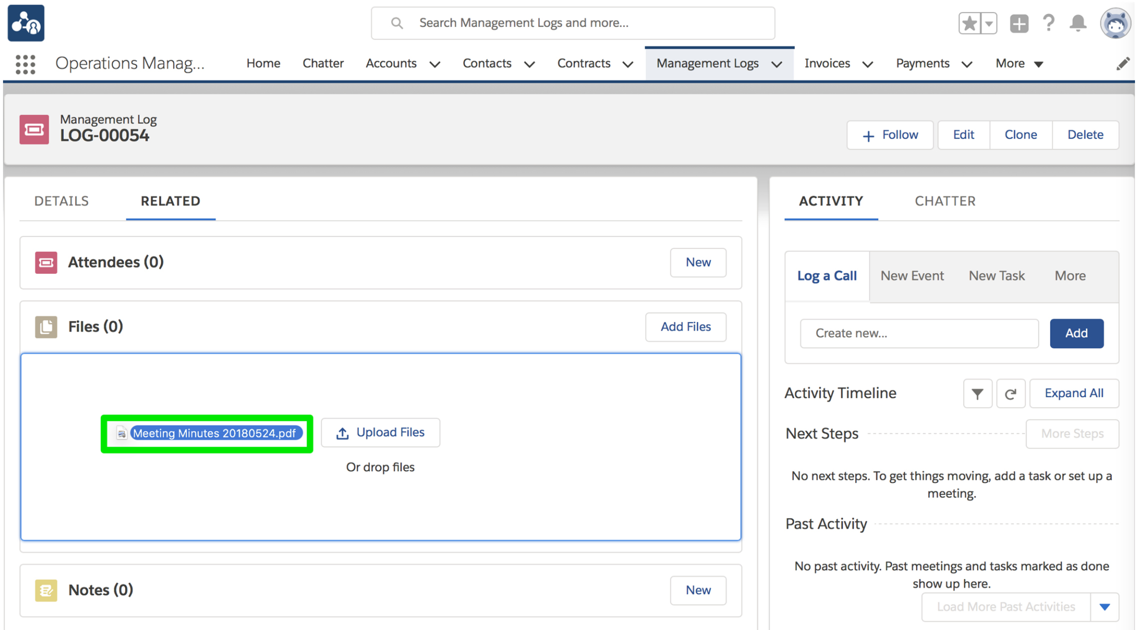
In addition to the four types of management log entries, attendee lists and meeting minutes, it is sometimes necessary to record documents, forms or agreements. You can record this information against any of the Management Log types by creating an attachment to the record.

To record an attachment

1. From the **Management Log**'s **Related** tab, locate the **Files** section.

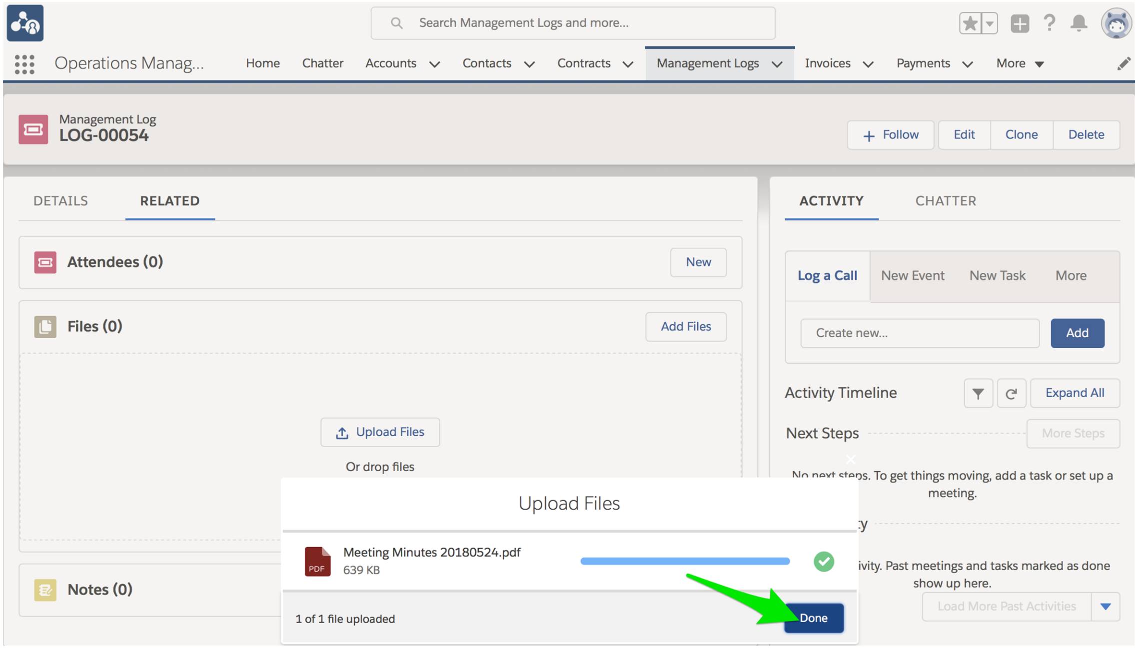


2. Drag a file from your computer and drop it in the **Files** section.

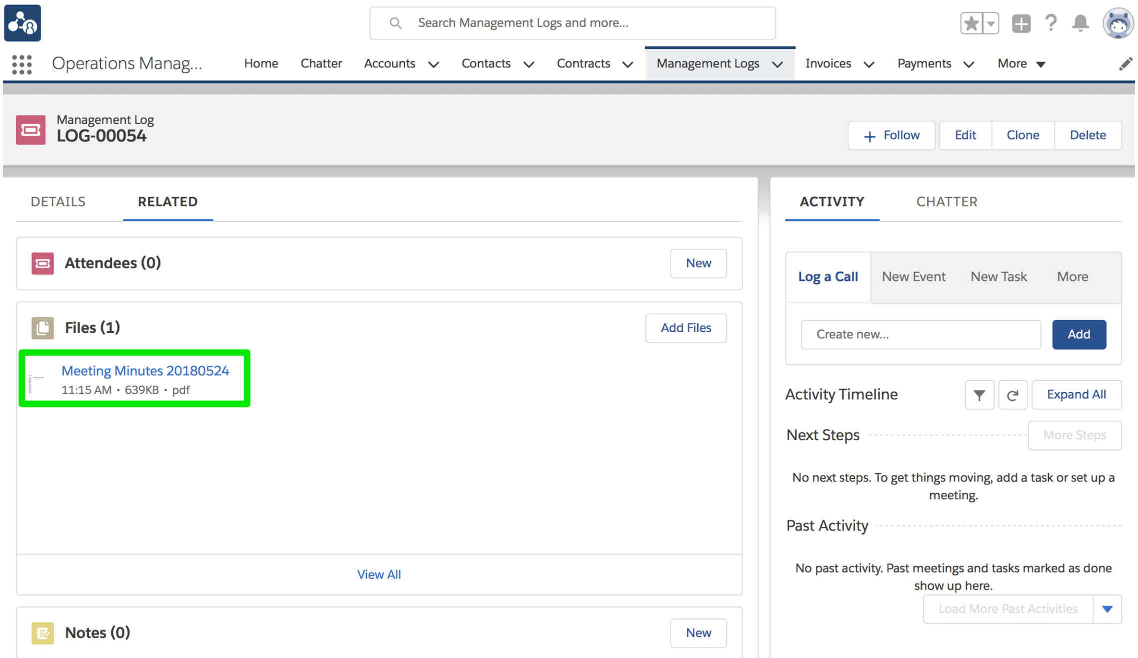


The **Upload Files** dialog box appears.

3. When uploading is complete, press **Done**.



The file is now attached to the **Management Log** record.

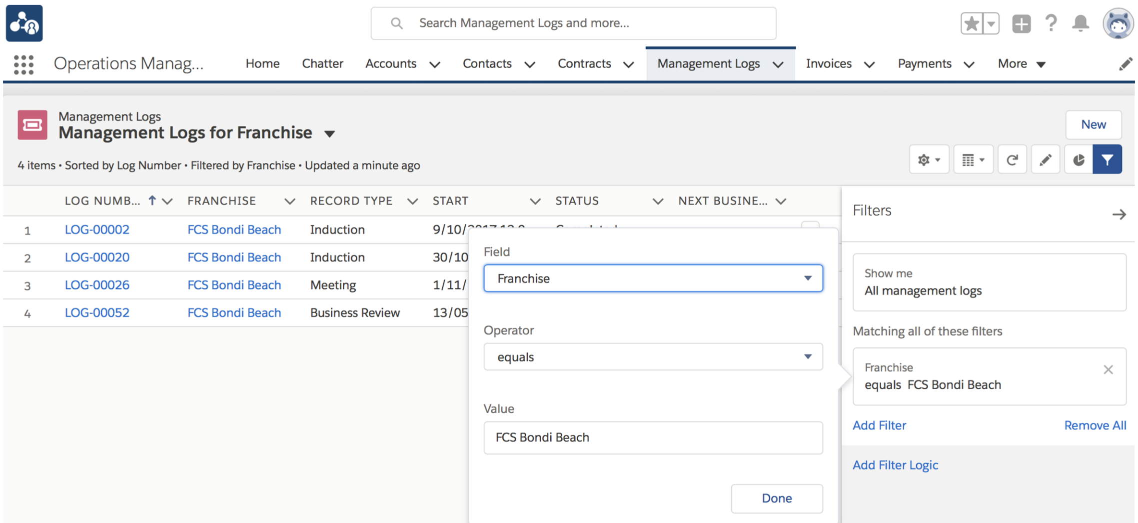


How to view all management logs for a particular franchise

It is useful to be able to view all the management log entries for a particular franchise. This allows you to review all meetings, business reviews, audits and inductions conducted over a period of time.

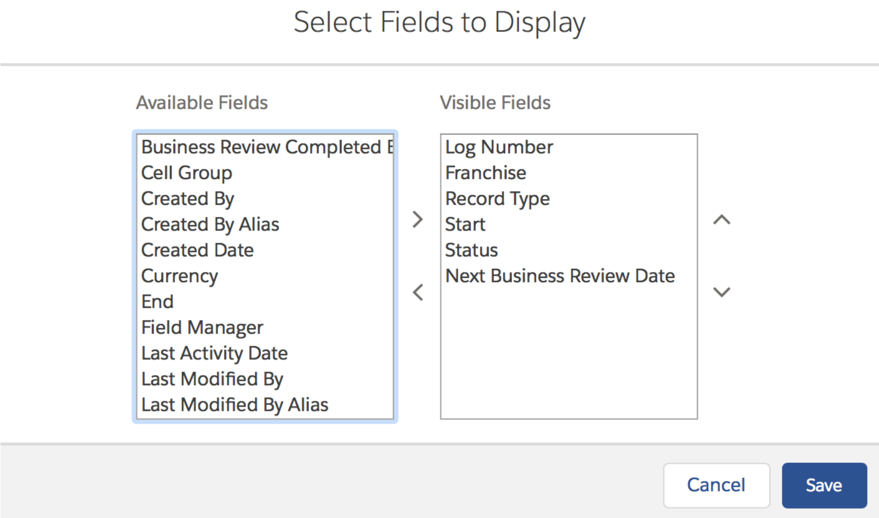
To view all management logs for a particular franchise

1. In the Salesforce **Management Logs** tab, create a filter named `Management Logs for Franchise` using the filter settings shown in the screen shot below.



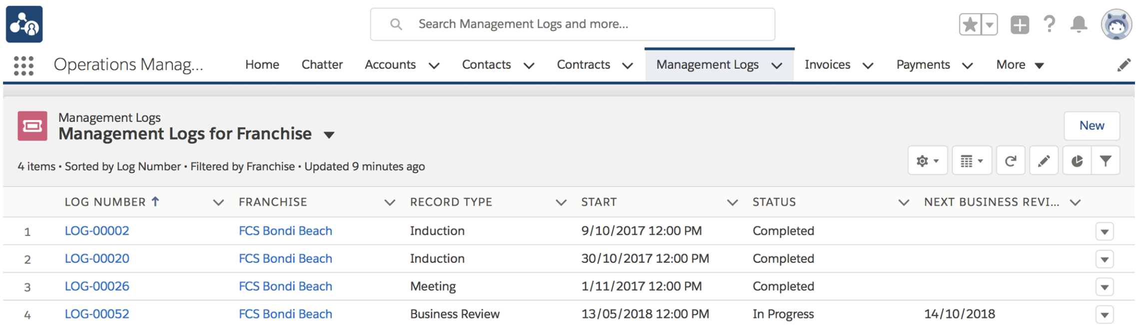
For step-by-step instructions for creating this filter, *See* "How to create your own list view" on page 18.

2. Add fields that you find useful.



For step-by-step instructions for adding fields, *See* "How to add columns to a list view" on page 21.

3. You will now be able to see all management logs for a particular franchise.



If you use a filter like this frequently, you might want to create a specific filter for each franchise that you regularly review. With infrequent use, you might just change the franchise name in the filter when you want to see a new franchise.

CHAPTER 7

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

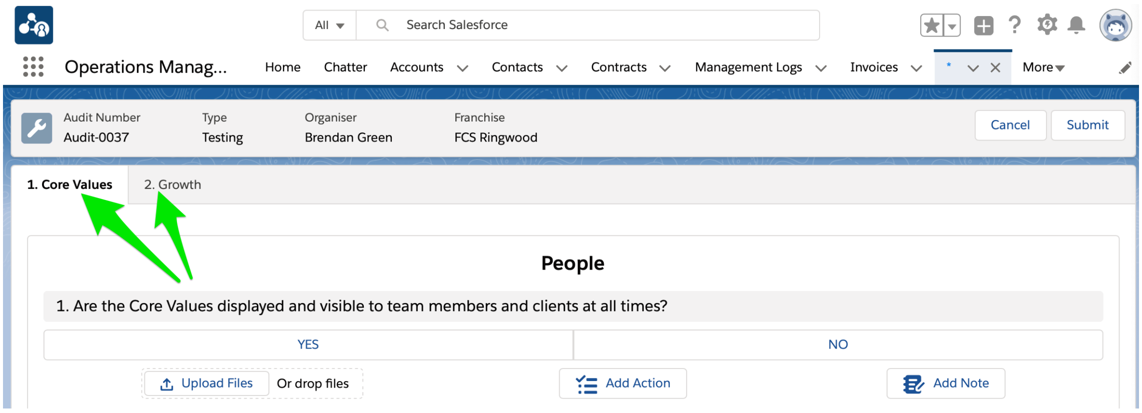
- Binary answers: Yes or No | Pass or Fail | True or False
- Scaled answers (0-n)
- Worded responses selected from a defined set
- Not applicable (N/A)

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.

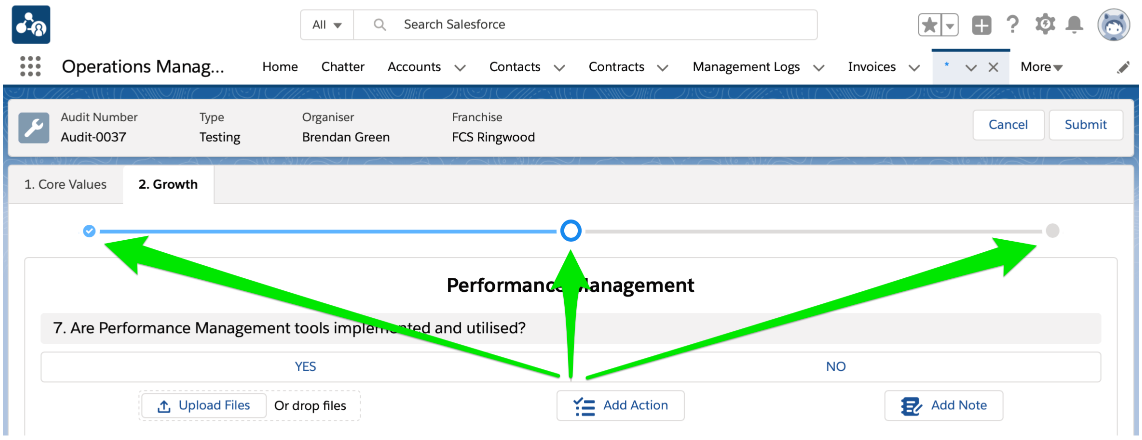
How audits appear to end users

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

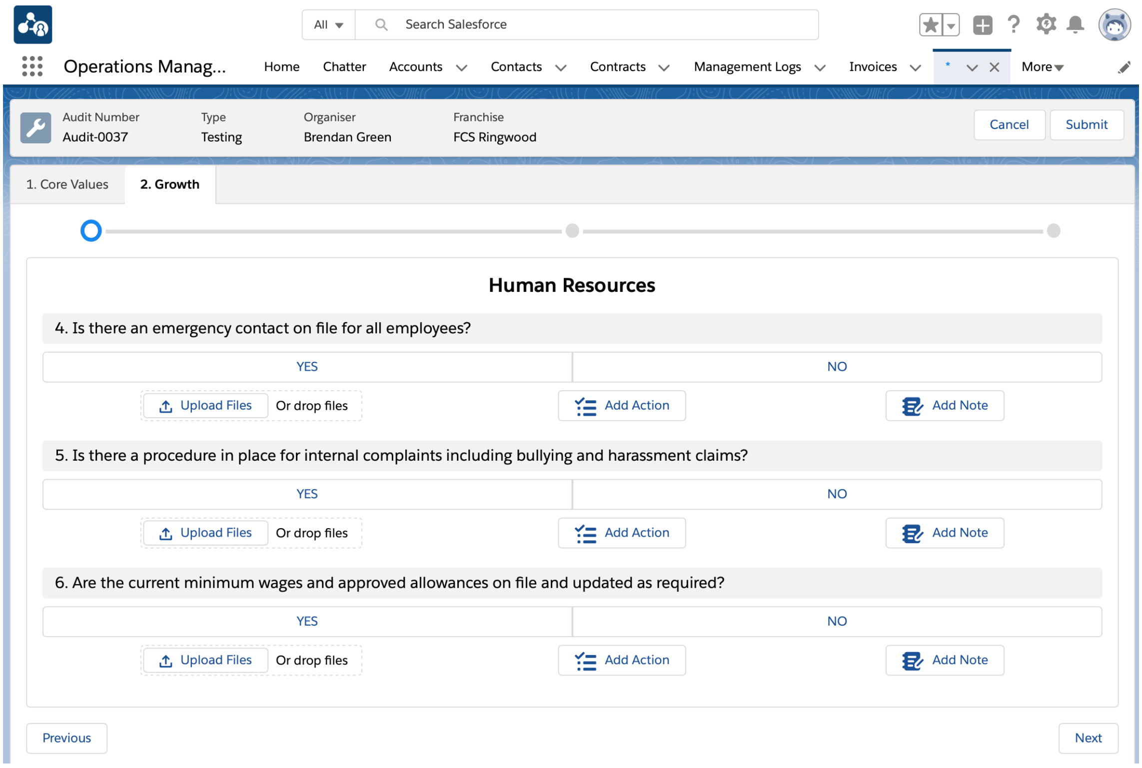
- Questions can be grouped by tabs.



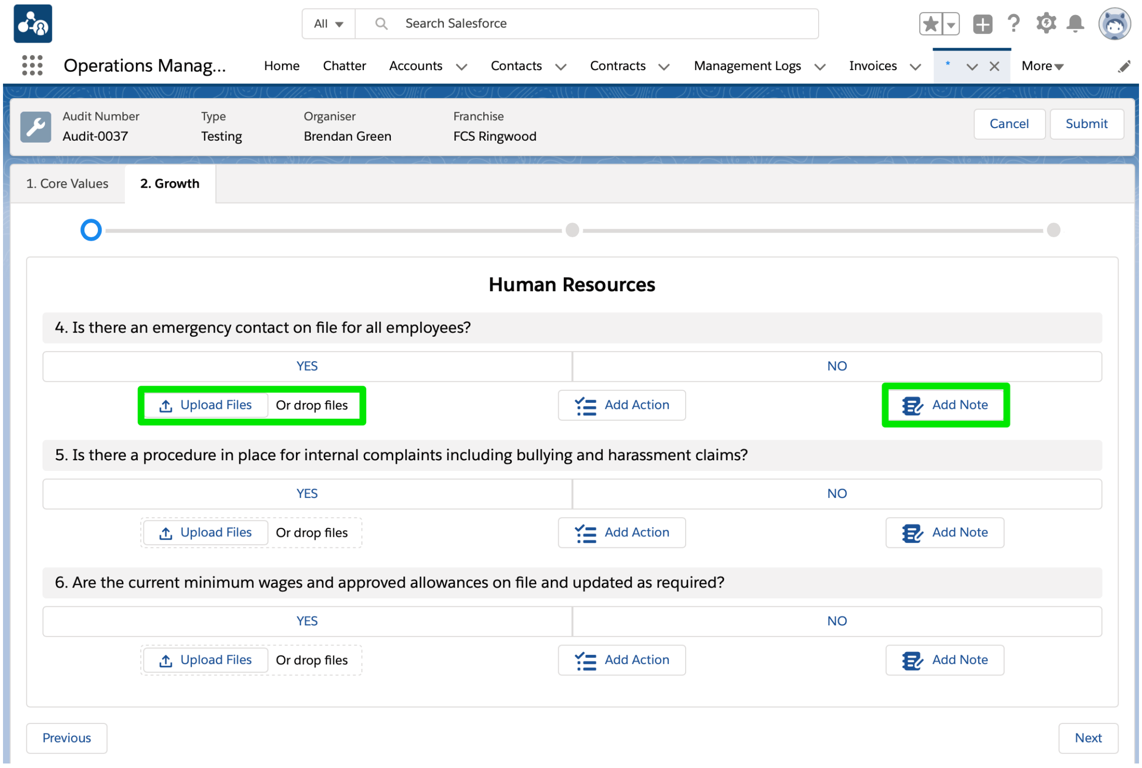
» Each tab can show multiple pages of questions. Progress is shown on a progress bar.



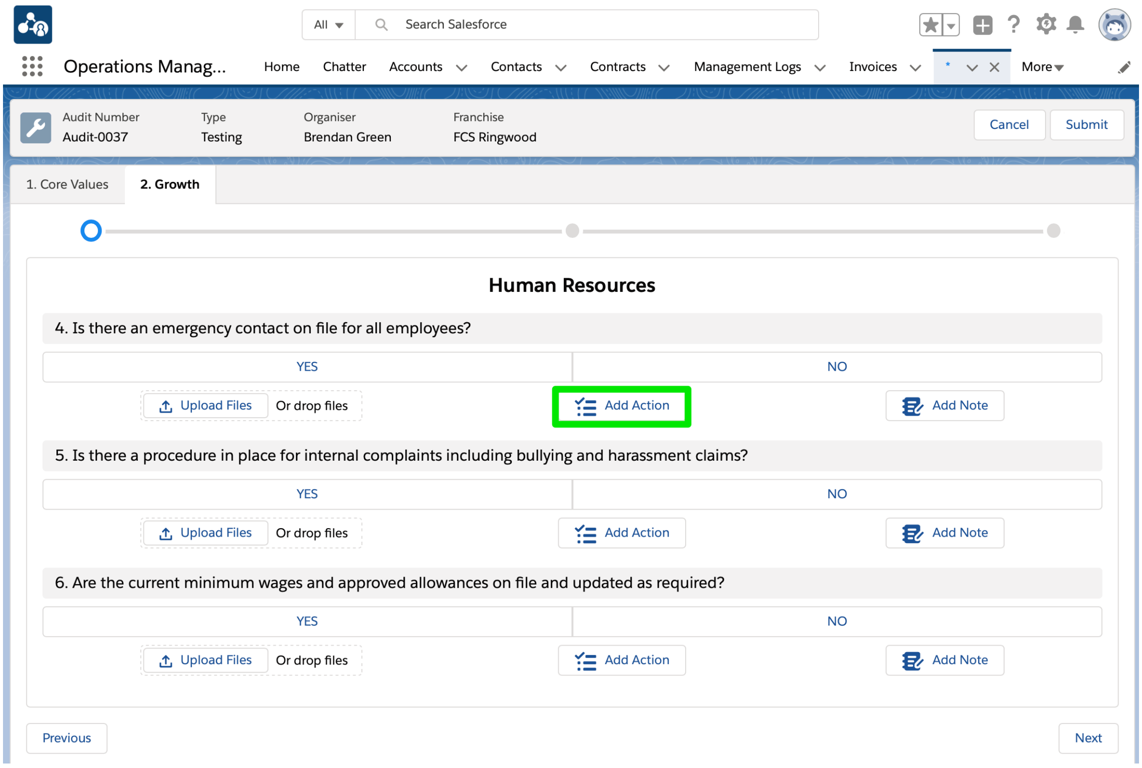
» One or more questions can display on each page.



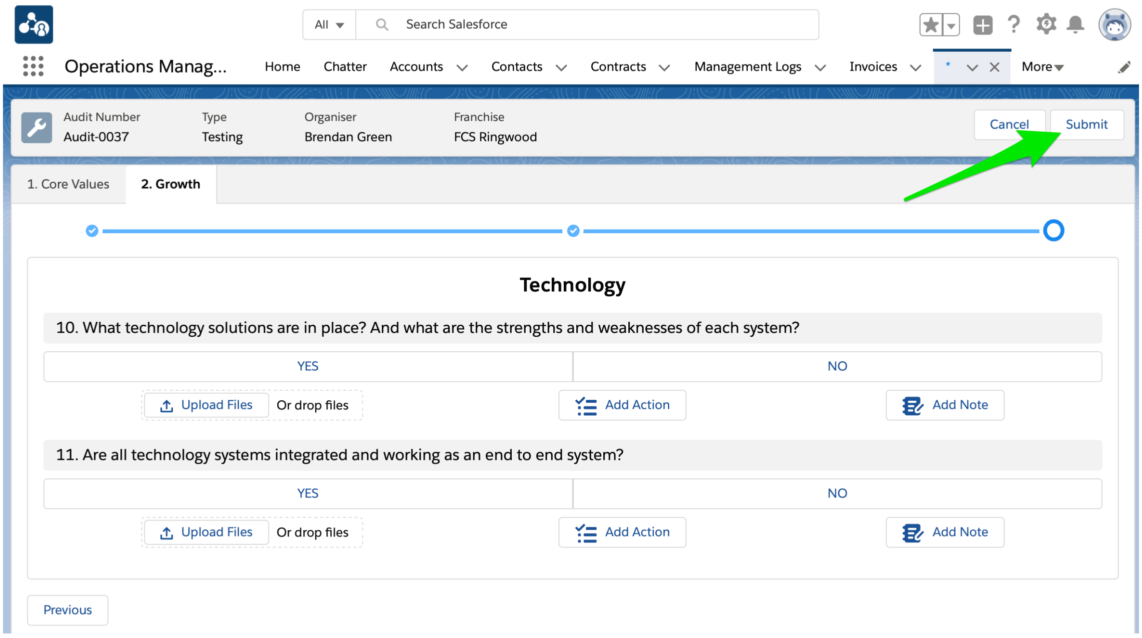
» The user can provide evidence for answers by recording notes or uploading files, images and photographs.



» Actions arising from the observation can be created.



» When complete, the user submits the audit.



How to create an audit record

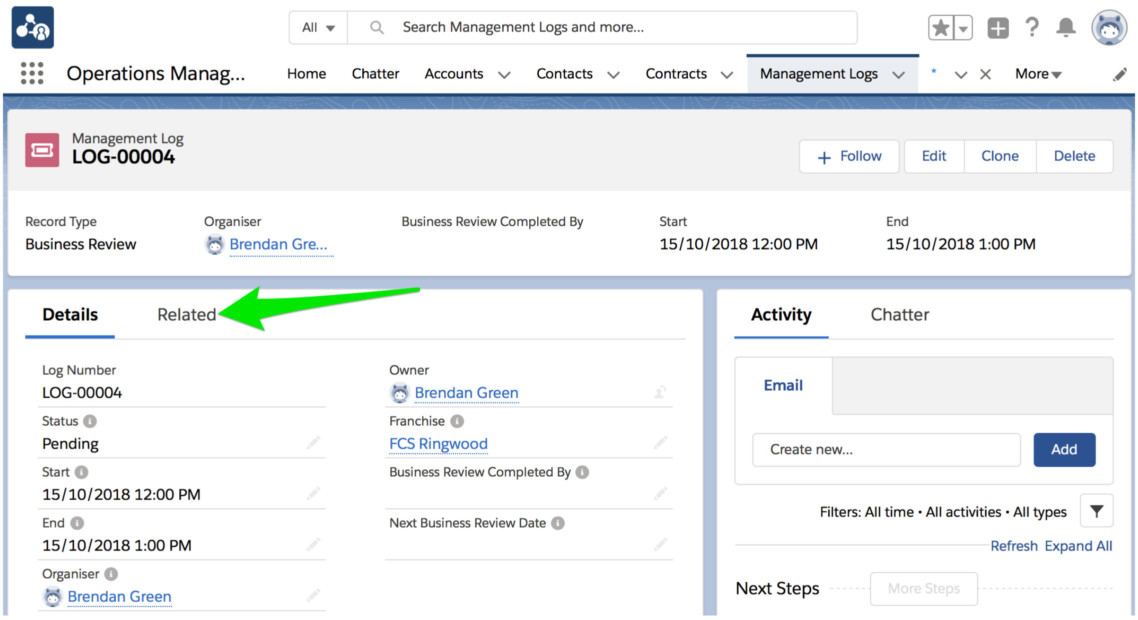
Audits can be attached to a range of records. It is often attached to a Job when producing evidence of compliance at different stages in a job.

> Creating an audit requires an `Audits User` permission. If you need to complete audits and don't have access to the **Audits** section shown in the procedure below, speak to your system administrator.

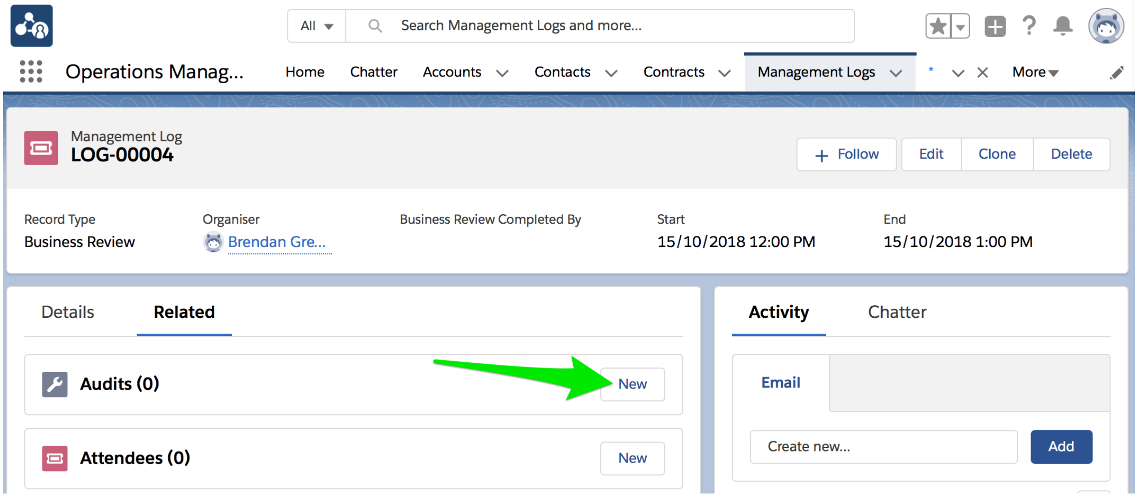
Creating an audit attached to a Management Log

To create a new audit record

1. From the **Management Log**, select the **Related** tab.

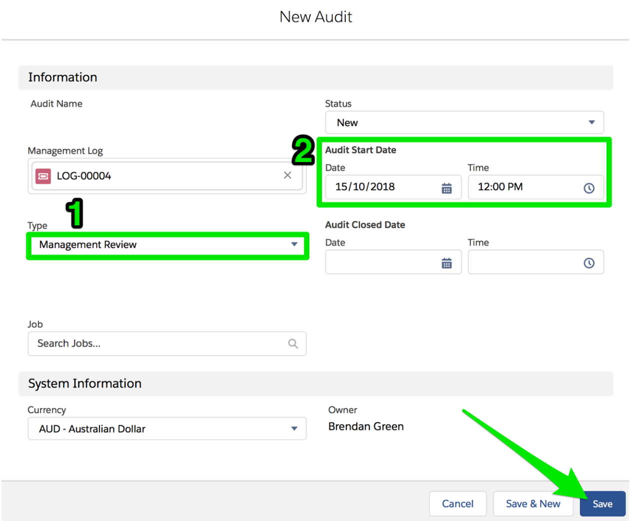


2. From the **Audits** section, press **New**.

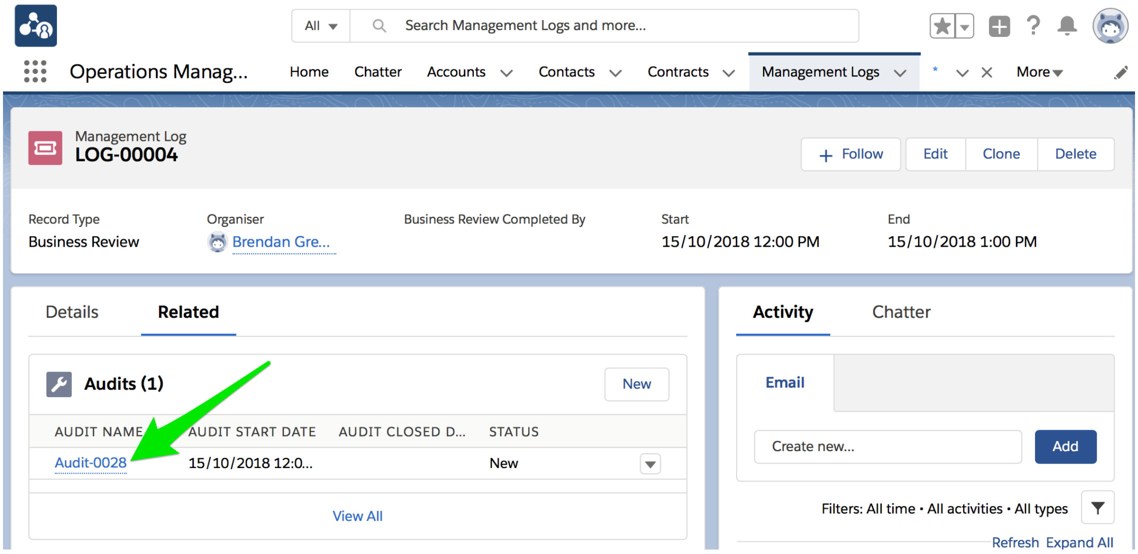


The **New Audit** dialog box appears.

3. Select the `Type`, enter the `Audit Start Date`, and press **New**.



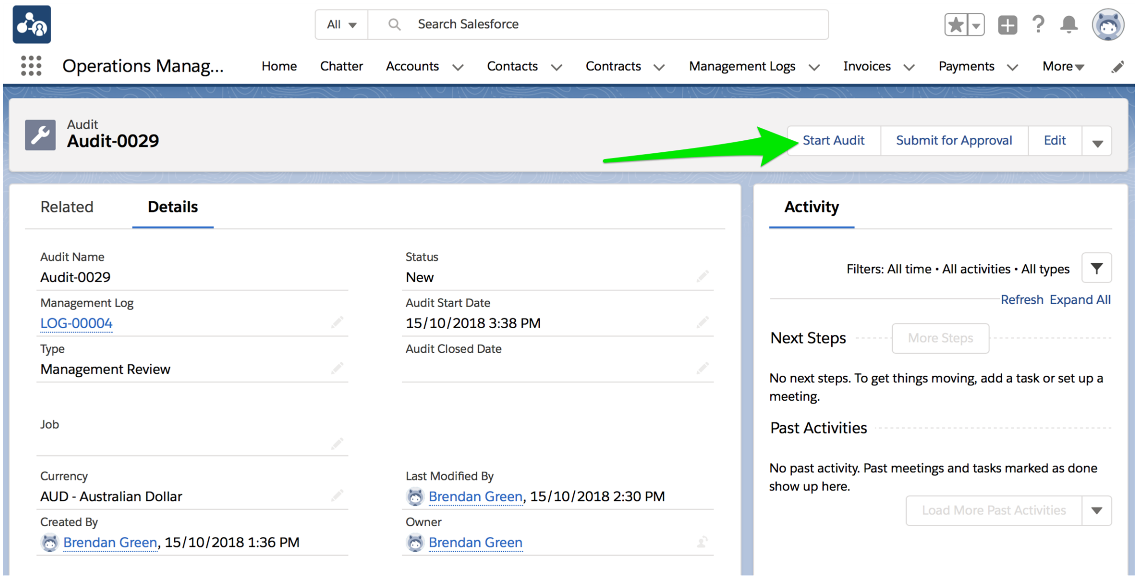
4. The **Audit** record is now created. To open the audit, **click on** `Audit Name`.



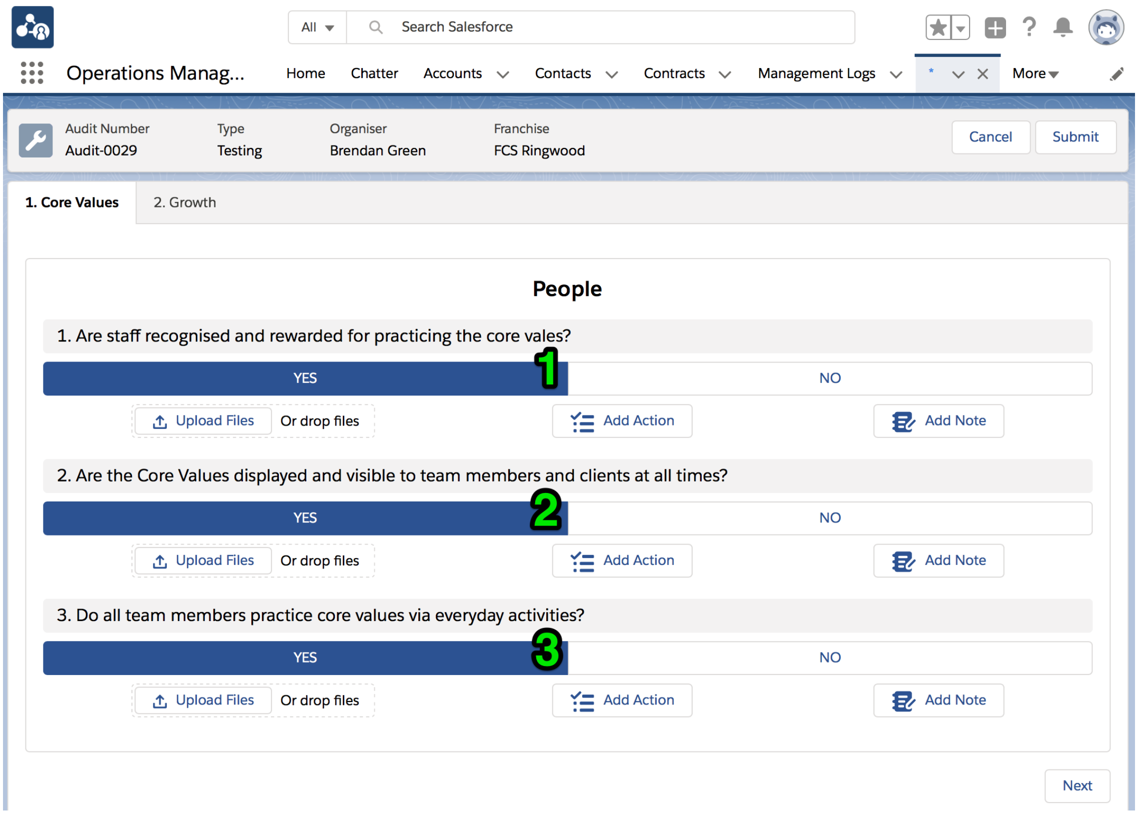
How to complete an audit on desktop

To complete an audit on a desktop

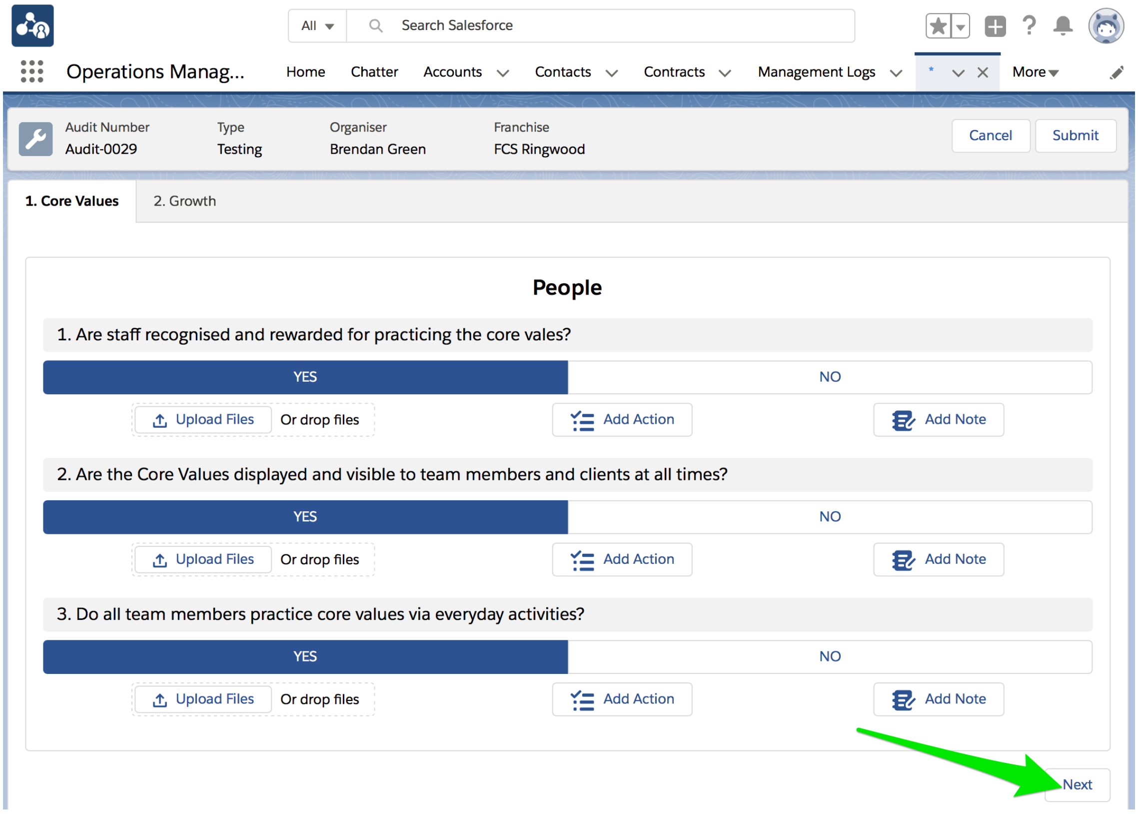
1. From the **Audit** page, press **Start Audit**.



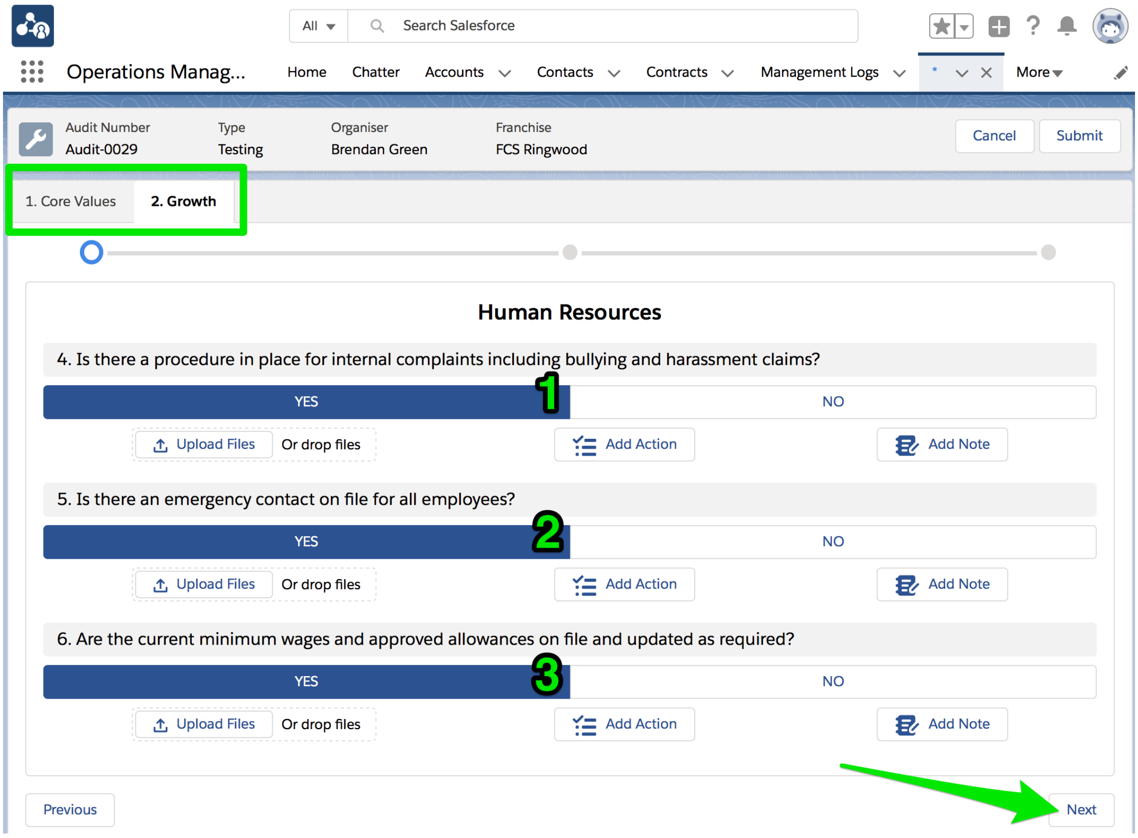
2. On any given page, answer each question.



3. When you are finished with a page, press **Next**.

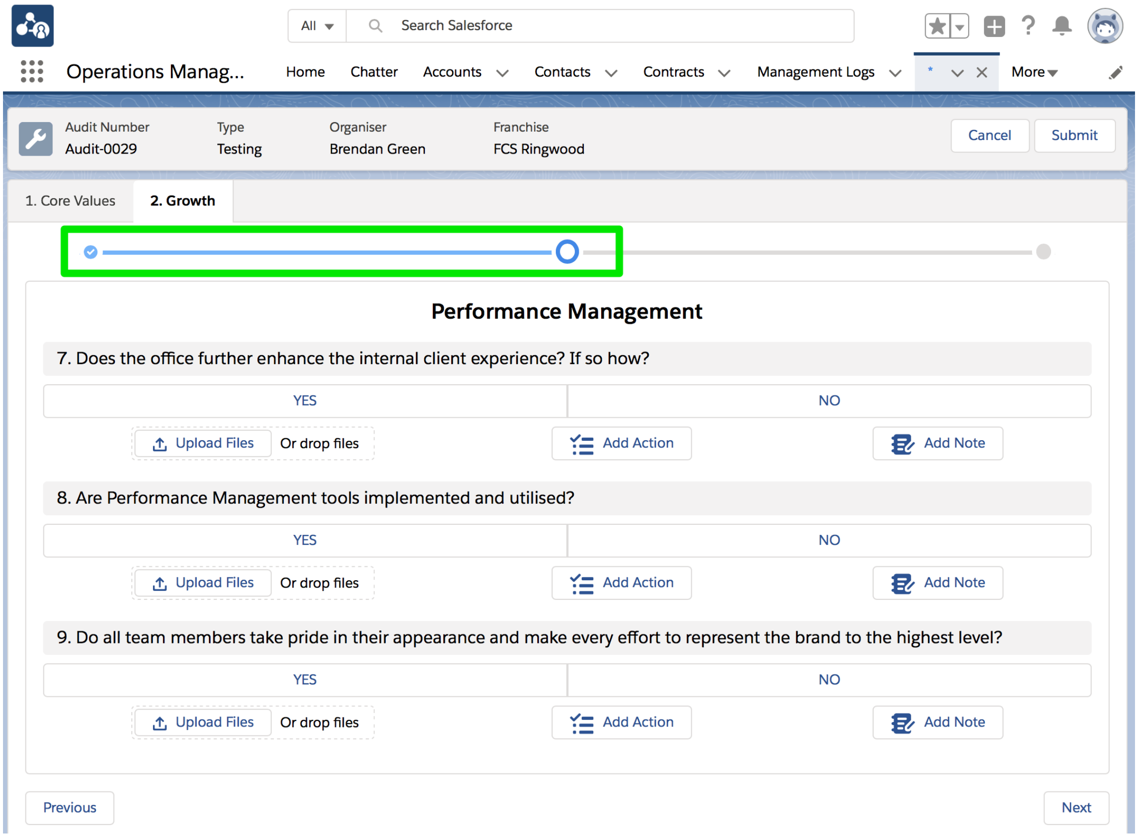


4. Notice the progress to the next tab. Answer each question, then press **Next**.



Remember to **Add Notes**, **Upload Files** or **Add Actions** to fully document any evidence useful for the purposes of your audit.

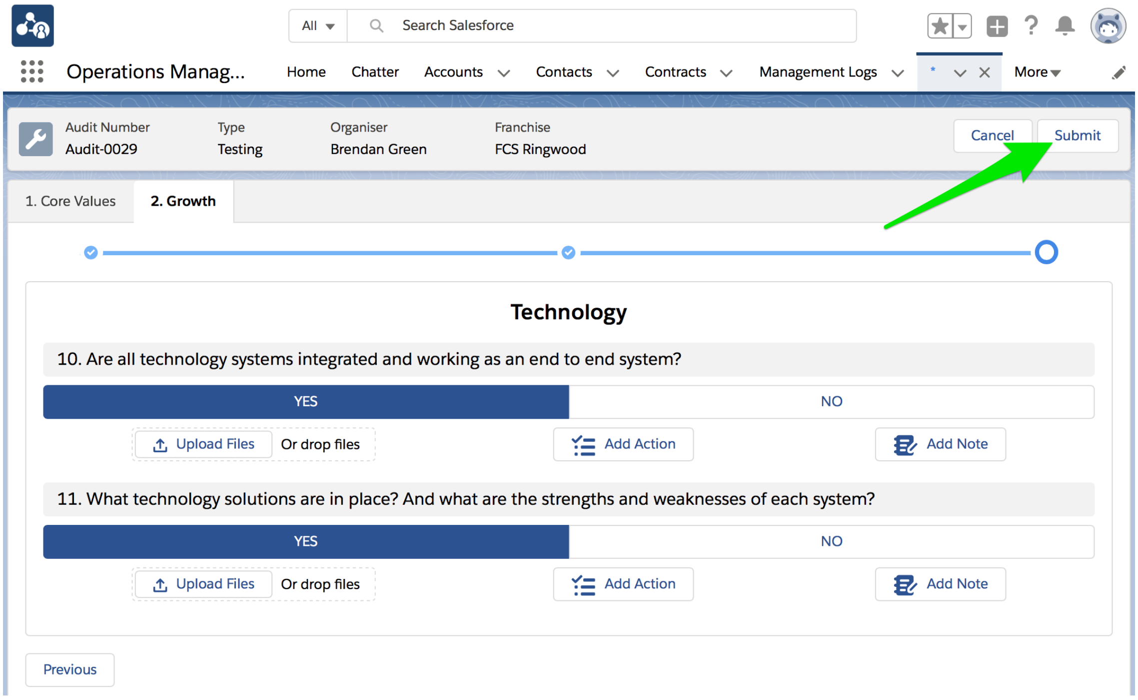
5. Notice the progress through the sections of the current audit tab.



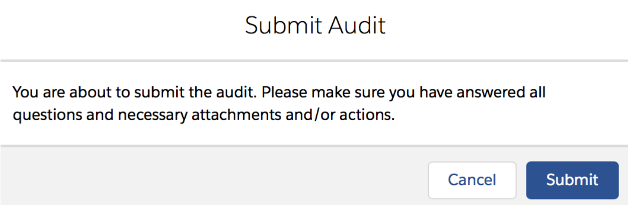
6. Continue clicking **Next** until questions in all sections of all tabs are complete.

> The **Next** button is not displayed on the last page of the audit.

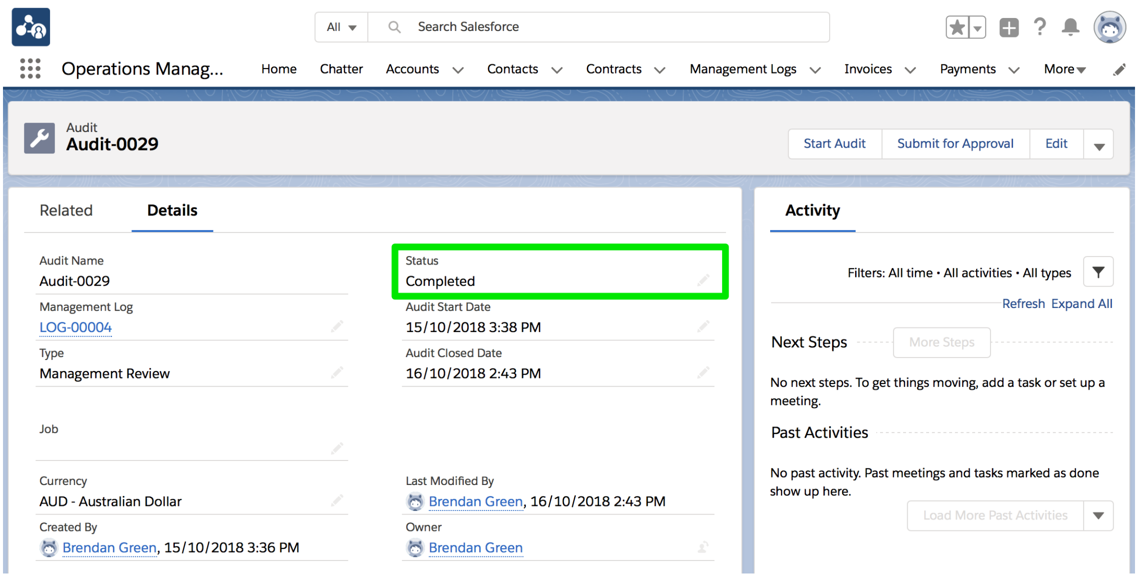
7. When you have answered all questions and entered all notes, attachments and actions, press **Submit**.



8. Consider whether you have answered all questions and entered all necessary attachments or actions. When you are sure, press **Submit**.

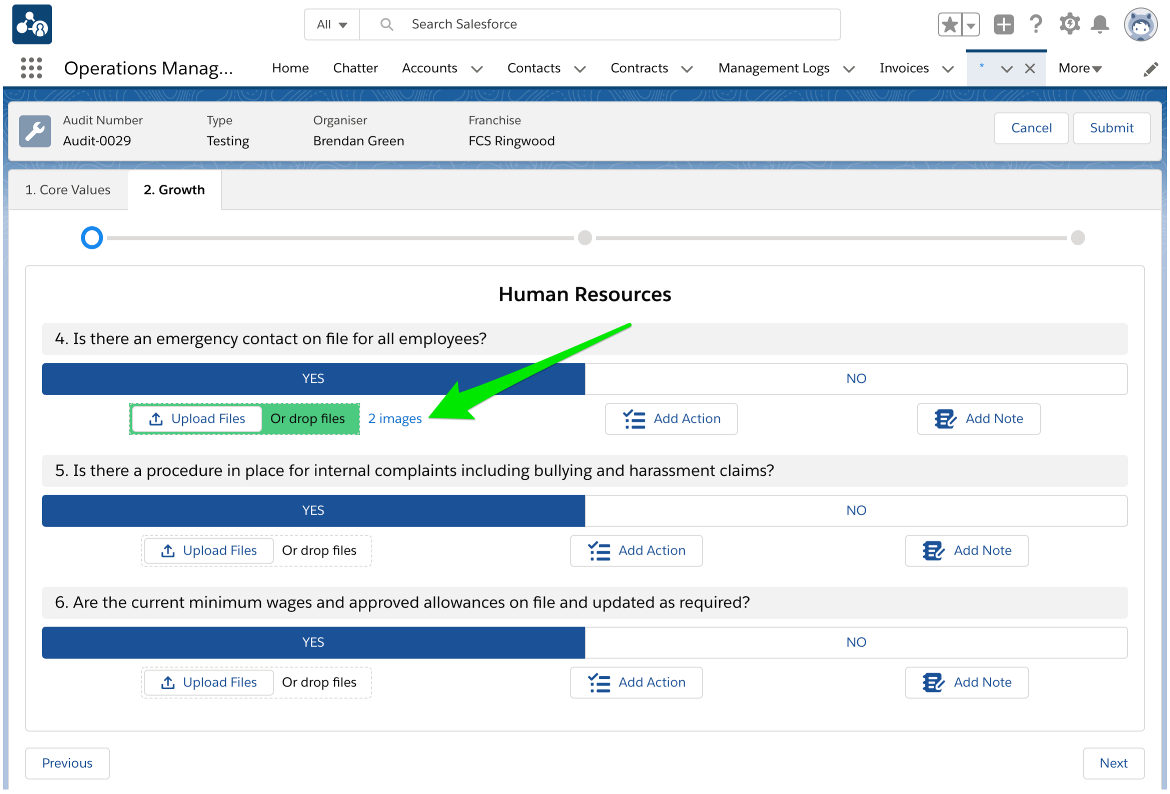


9. The Audit is now completed.



How to work with attachments that are not images

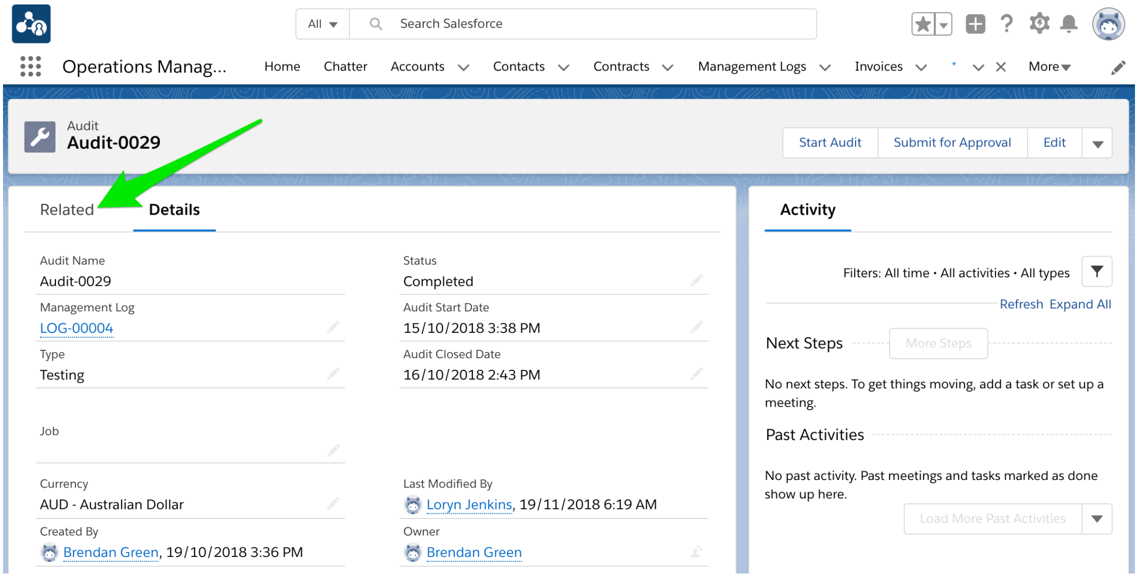
Attachments that are images can be viewed by clicking the images link. Clicking the image link allows you to view the image. You have the option to delete the image should you choose to do so.



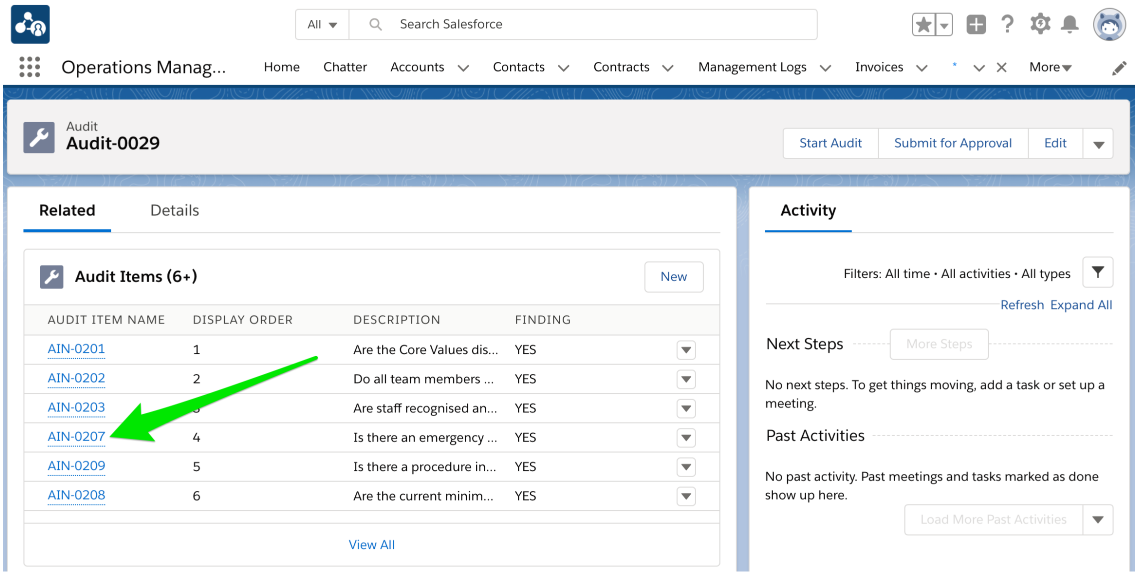
Attachments that are not images are managed via attachments to the audit questions.

To locate non-image attachments

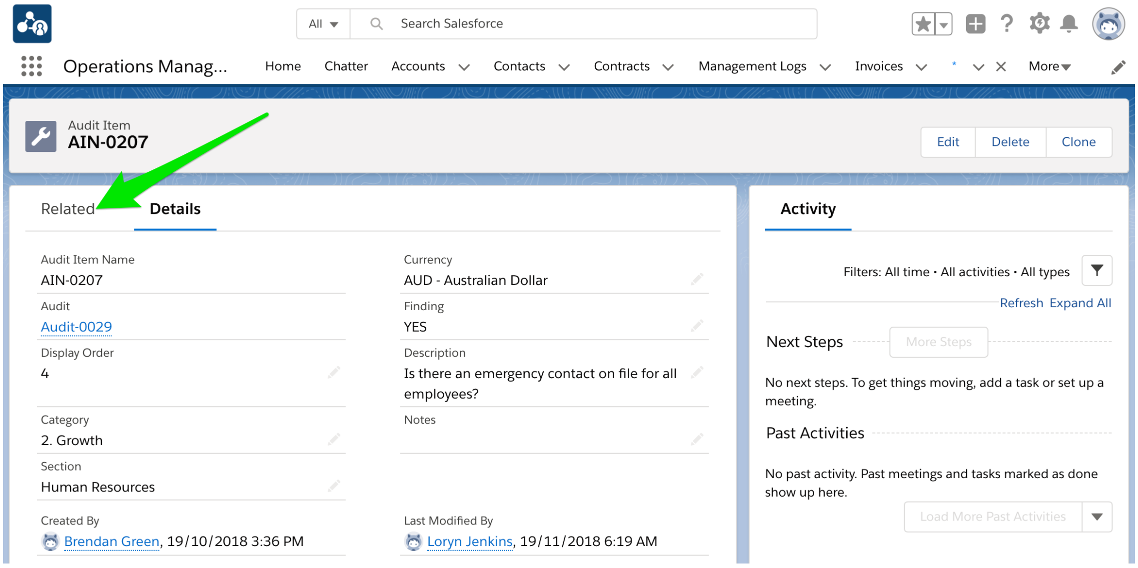
1. From the **Audit** record, selected **Related**.



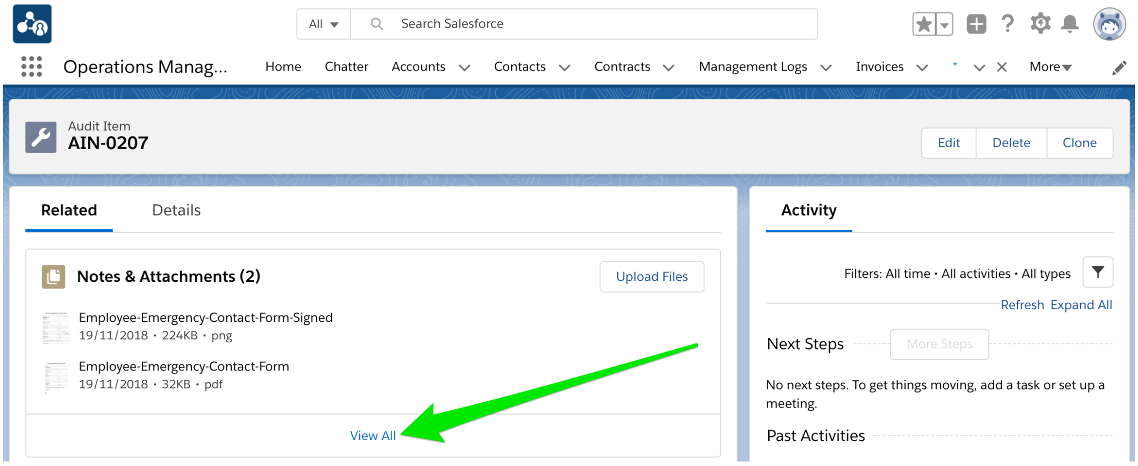
2. Select an **Audit Item**.



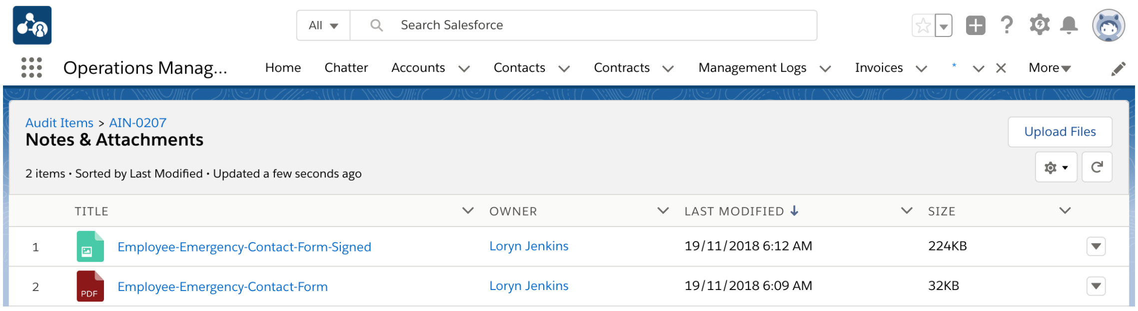
3. Now select the **Audit Item**'s **Related** tab.



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

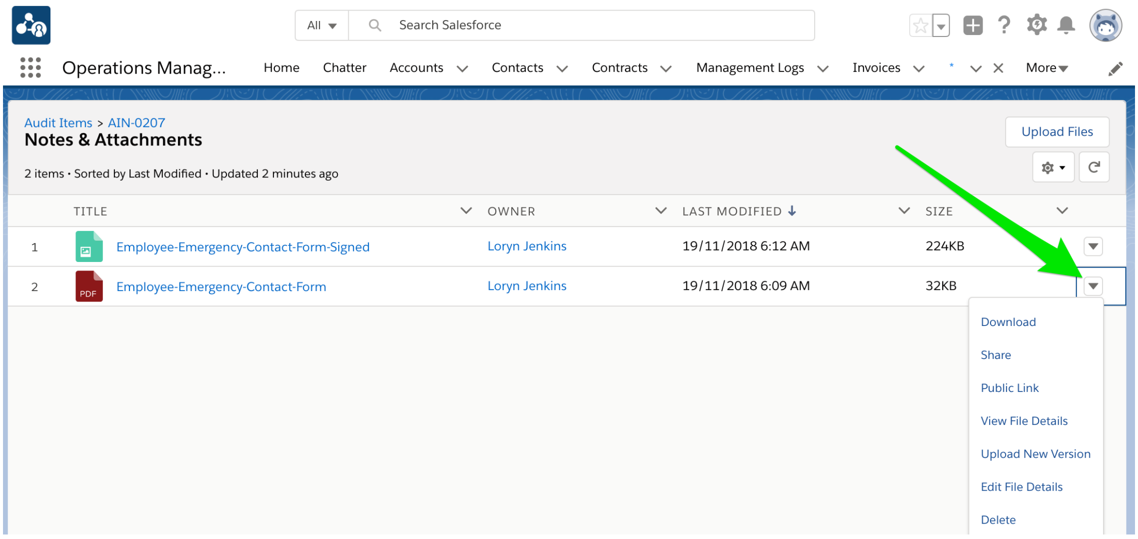


5. You can now view all the files attached to the question.



To edit any of the attachments

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



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.

> To obtain the `Audit_Resource.csv` file, talk to your system administrator.

> 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 (How to configure new audit types) 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.

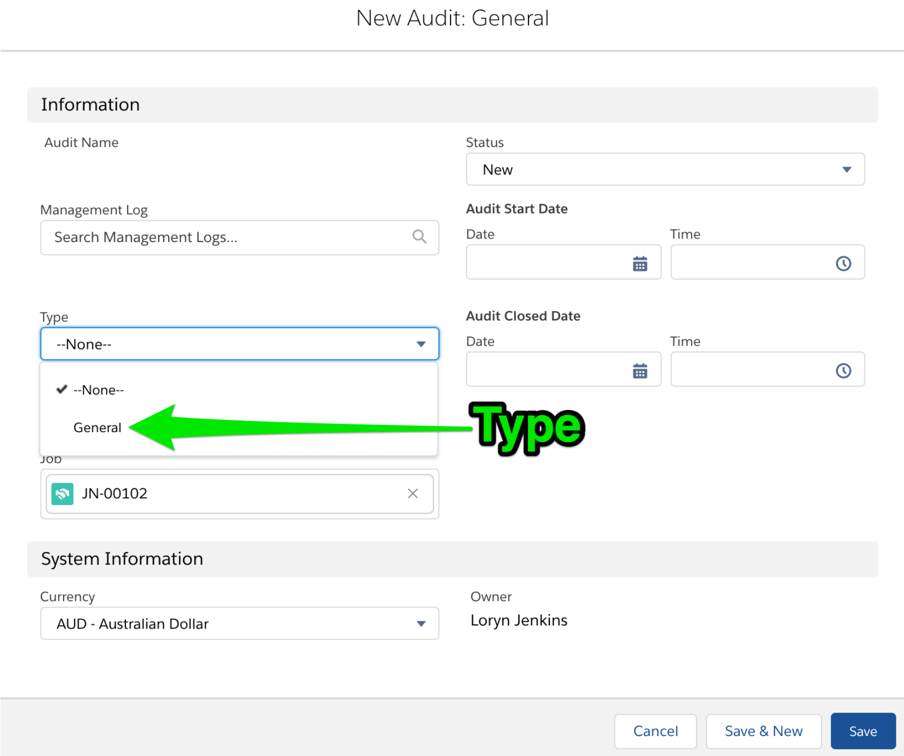
Possible Findings	Maximum Score	Score Direction	Description	Comments
N/A | False | True	10	UP	True will score 10 False will score 0 N/A excludes question from scoring	Score Direction has no effect on binary responses.
N/A|1|2|3|4|5	5	UP	1 will score 1 2 will score 2 3 will score 3 4 will score 4 5 will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

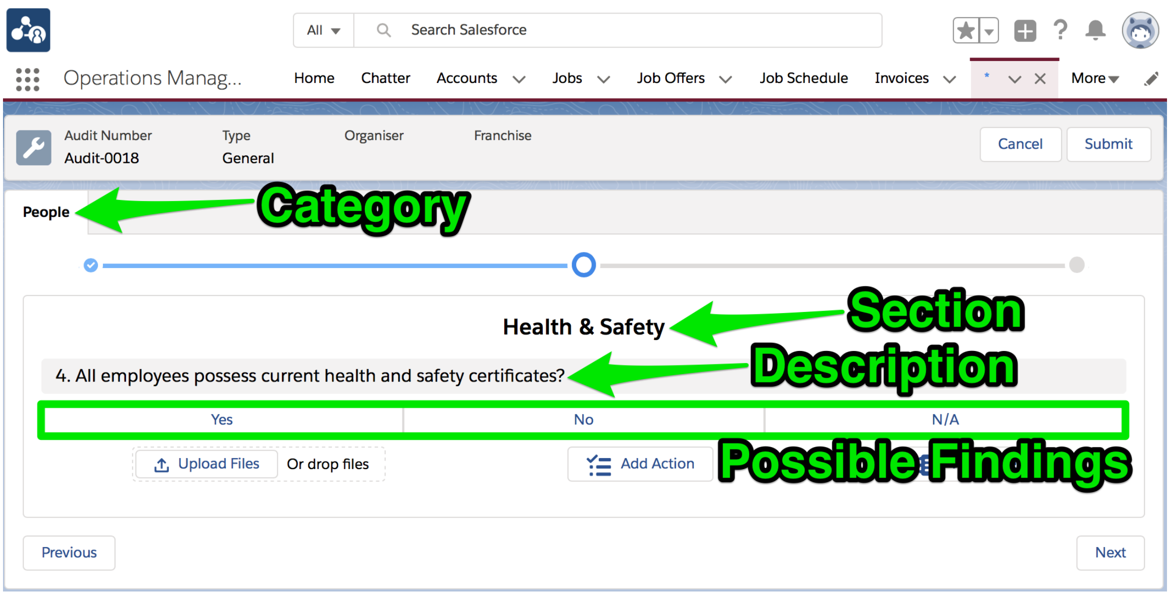
Possible Findings	Maximum Score	Score Direction	Description	Comments
Slider:%	100	UP	The score will be the selected value.	Slider increments by 0.01, which is multiplied by the Maximum_ Score to obtain the score value.
Slider:2	10	UP	Slider positions 0, 2, 4, 6, 8, 10 will be generated. The score will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





CHAPTER 8

Working with Expenses

Understanding expenses

Expenses enable you to include charges on franchisee invoices that are additional to standard contract fees. You can include one off charges or have a charge be invoiced in a series of installments.

When you enter an expense, the expense is converted into one or more expense lines.

- When you enter an expense with a single installment, it is converted into a single expense line.
- When you enter an expense with multiple installments, it is converted into one expense line per installment. The effective date of the installments are spread across subsequent months.

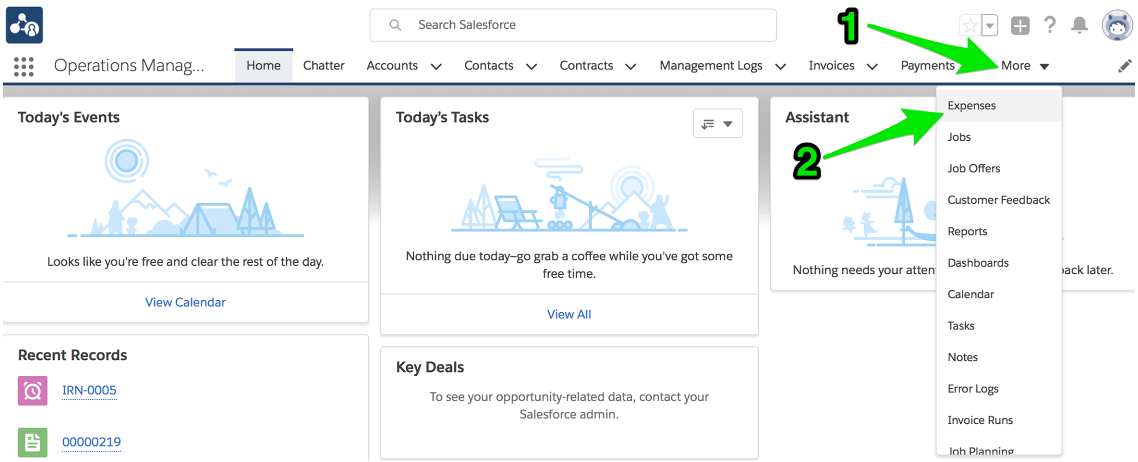
Expense lines are invoiced in the first invoice run configured to charge expenses and whose period includes the expense line's `Due Date`.

> Expenses can really lower the communications overhead between the management team and the finance team.
>
> For example, if the management team agrees to run additional advertising in a territory, they can enter the expense as a series of installments. These expenses will automatically be picked up by the invoice run. It avoids having to communicate special payment information to the finance team via email at the beginning or the end of the installments.

How to enter an expense

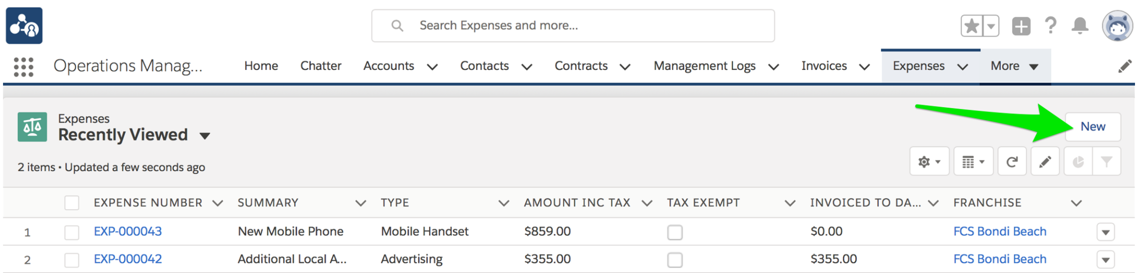
To create a new expense

1. Using the Salesforce menu, locate the **Expenses** tab.



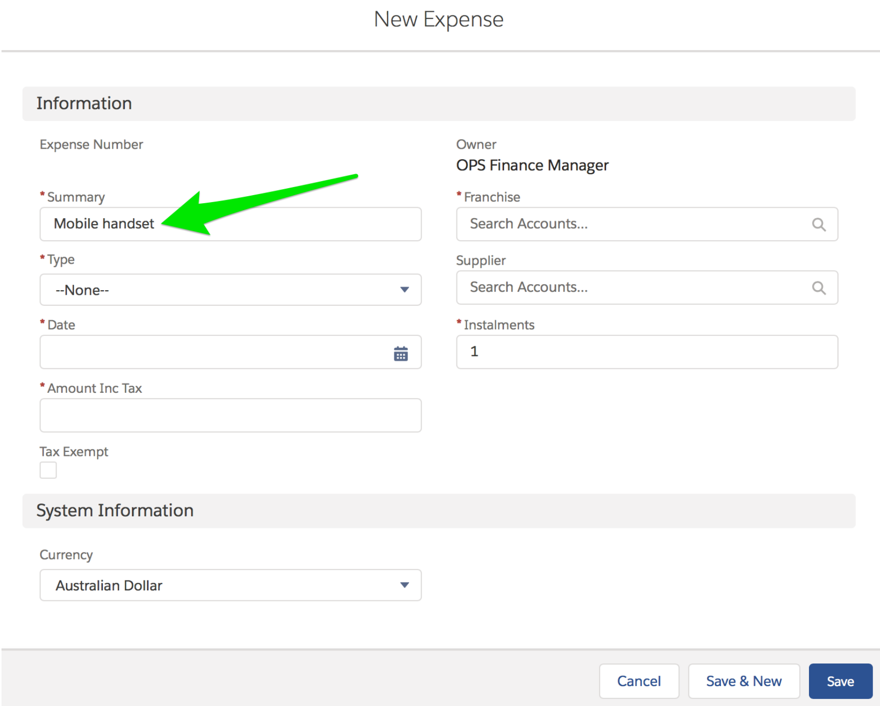
Recently Viewed expenses are displayed.

2. Press **New**.

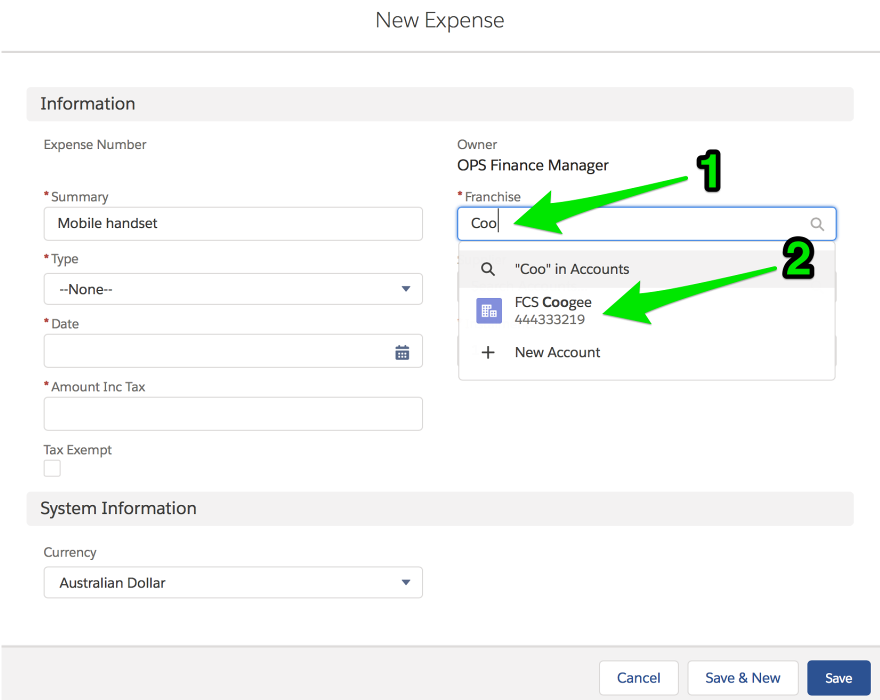


The **New Expense** dialog box appears.

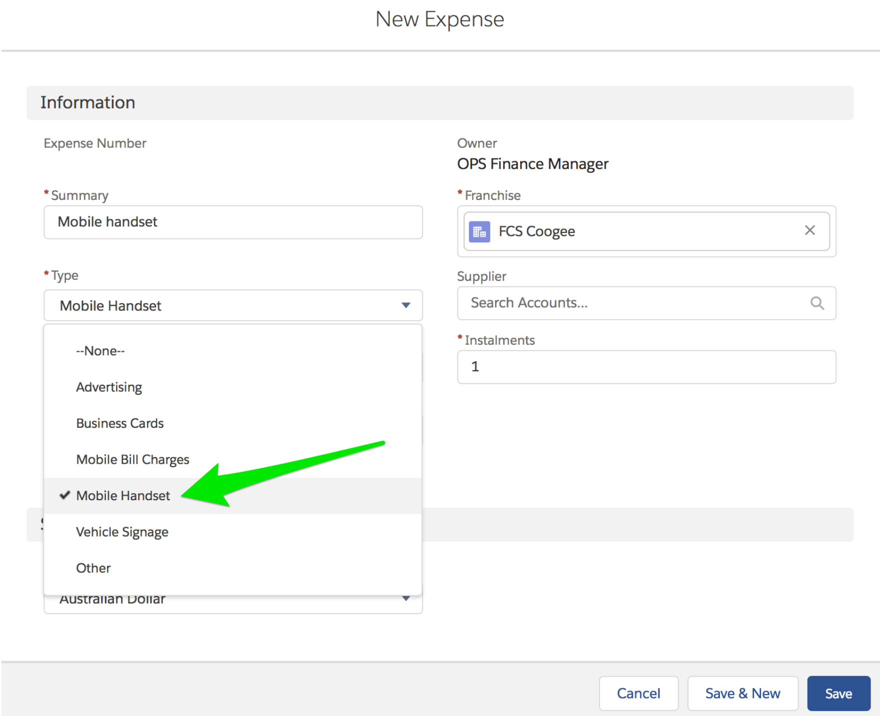
3. Enter the expense description into the `Summary` field. This will appear on the franchisee invoice.



4. Select the `Franchise` to which the expense will be invoiced.



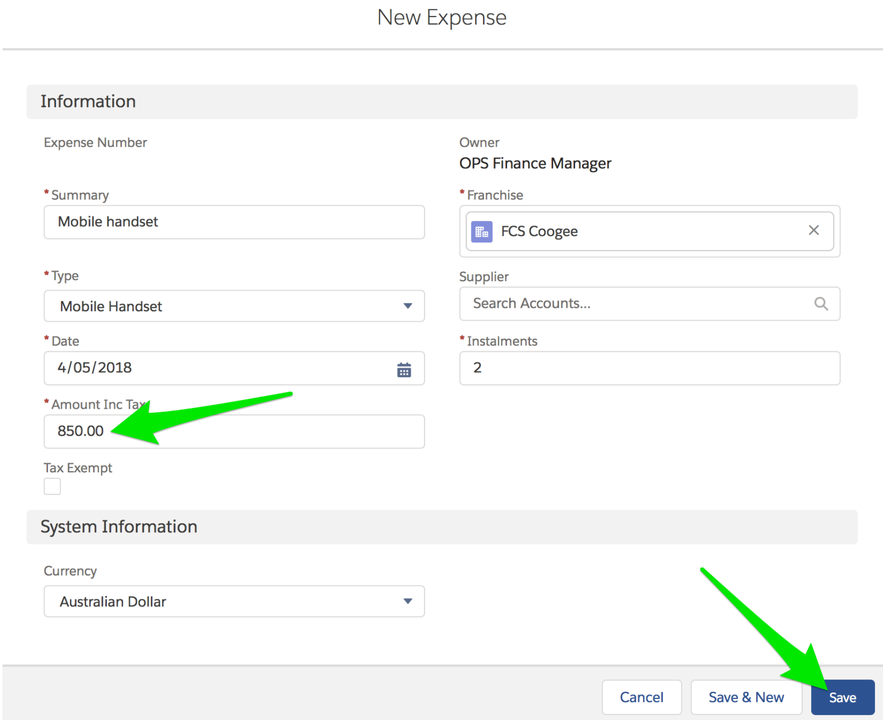
5. Select the expense `Type`.



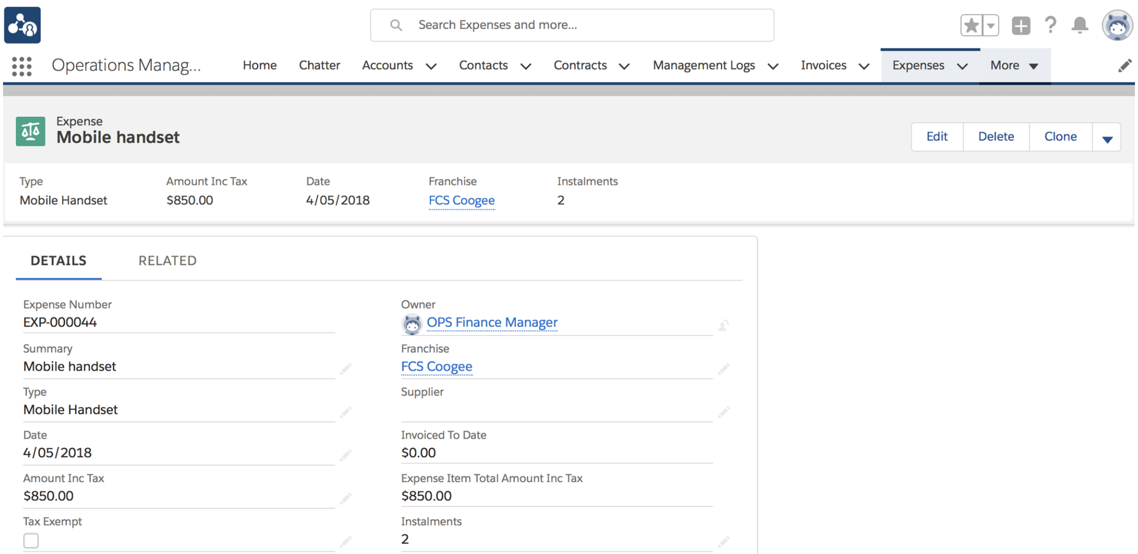
6. Enter the `Date` the expense was incurred.
7. Choose the number of installments in which this expense will be paid.

> Installments are payable on subsequent months.

8. Enter the **Amount Inc Tax**, then press **Save**.

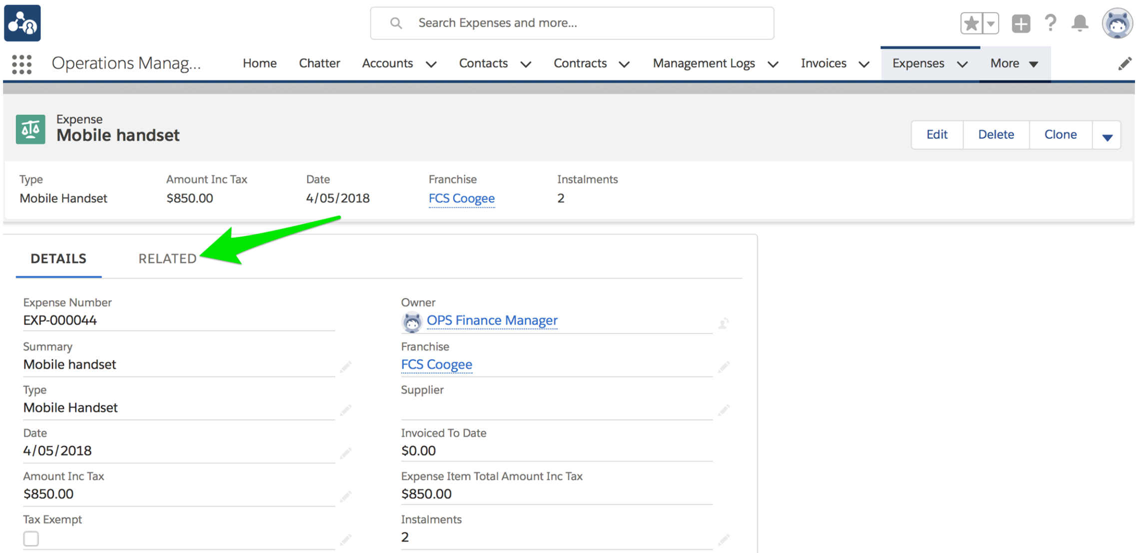


Operations Management displays the newly created **Expense** record.

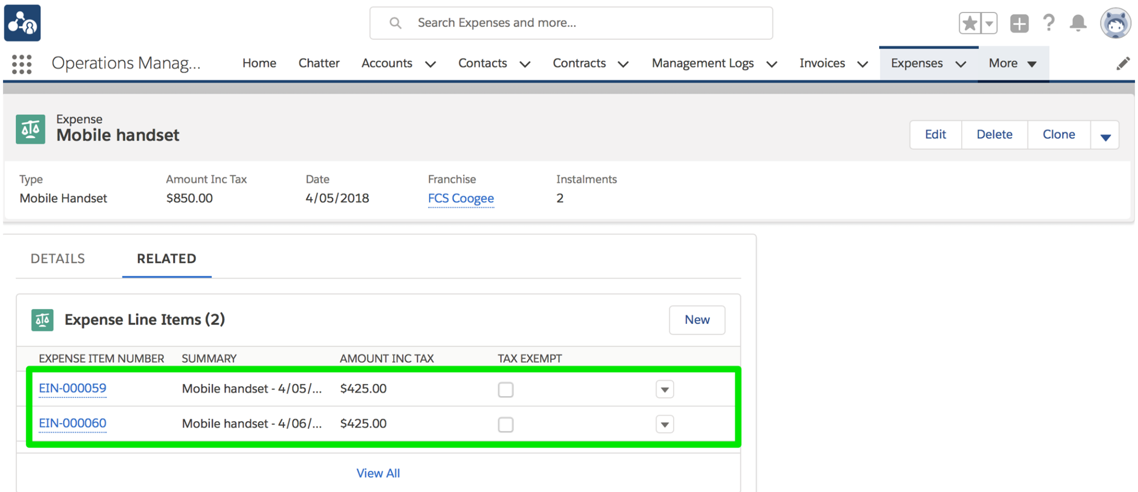


To see when an expense will become payable

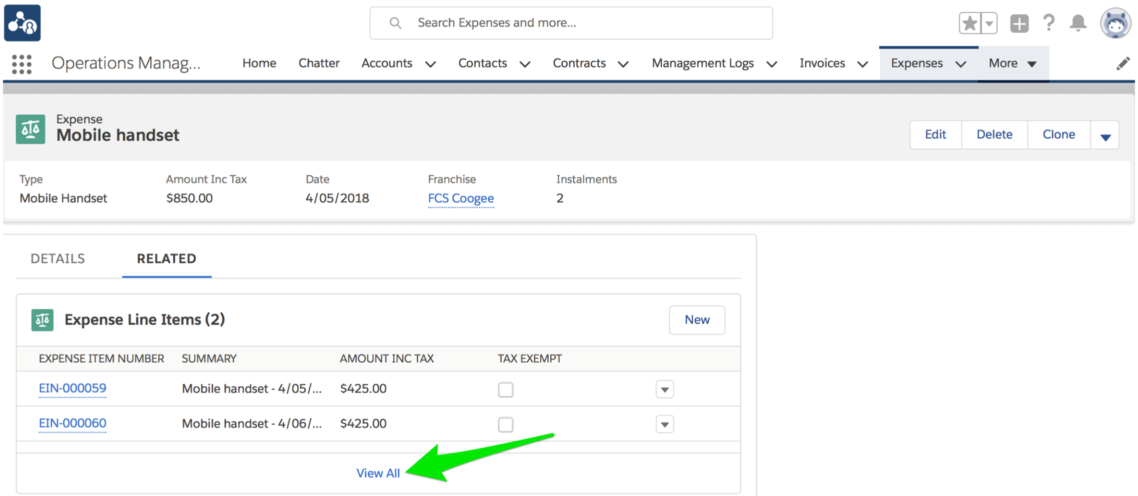
1. From the **Expense**, select the **Related** tab.



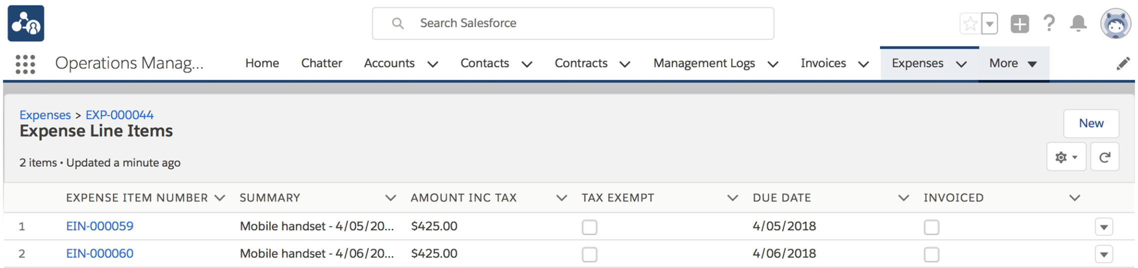
2. Review the expense lines.



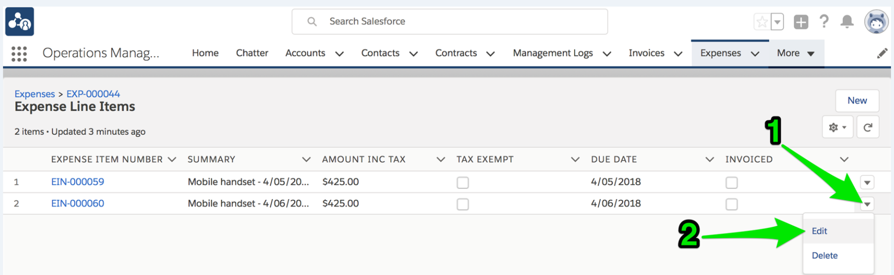
3. To see more detail, press **View All**.



All **Expense Line Items** display.



If you need to manually edit any of the expense lines, select **Edit**.



CHAPTER 9

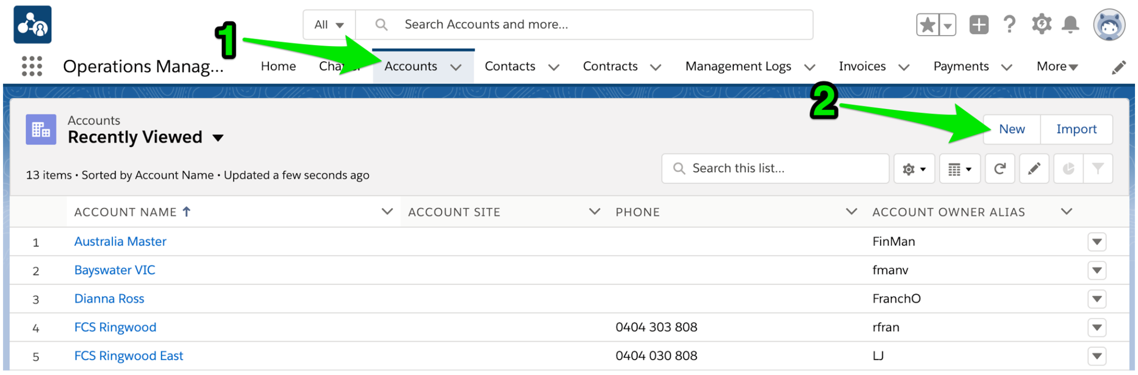
Working with Suppliers & Supplier Invoices

Adding a supplier

Operations Management represent suppliers as a special type of Business Account.

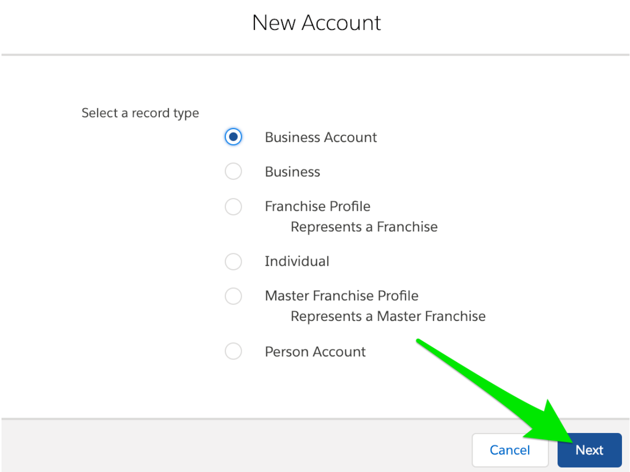
To add a supplier account

1. From the **Accounts** list page, press **New**.



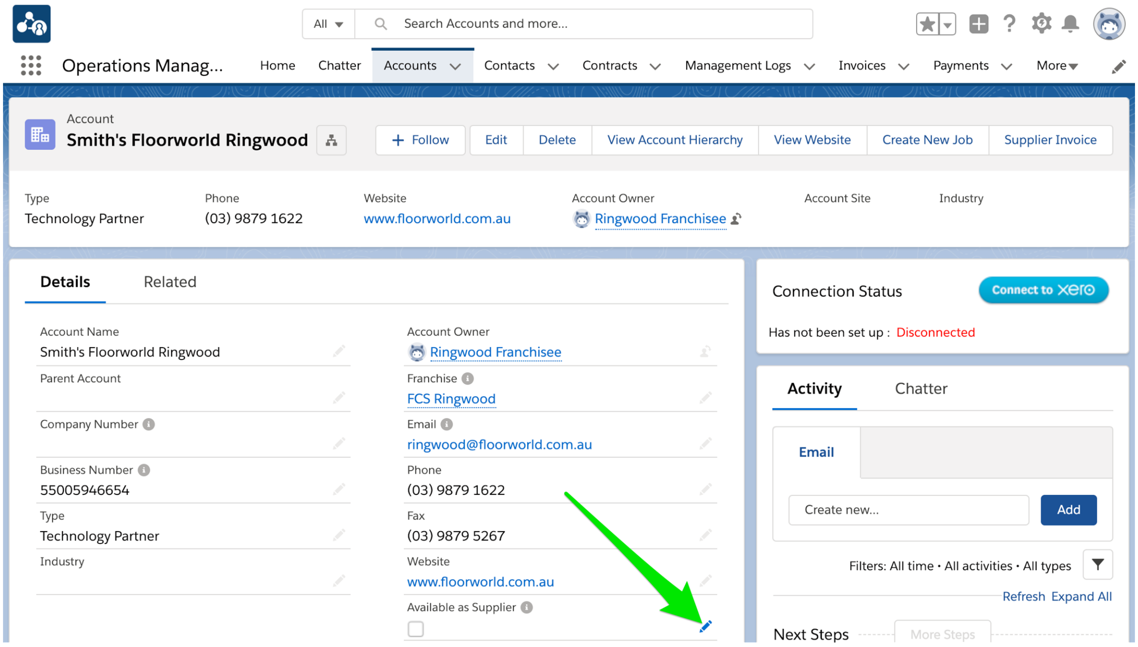
The **New Account** dialog box appears.

2. Check that `Business Account` is selected, then press **Next**.

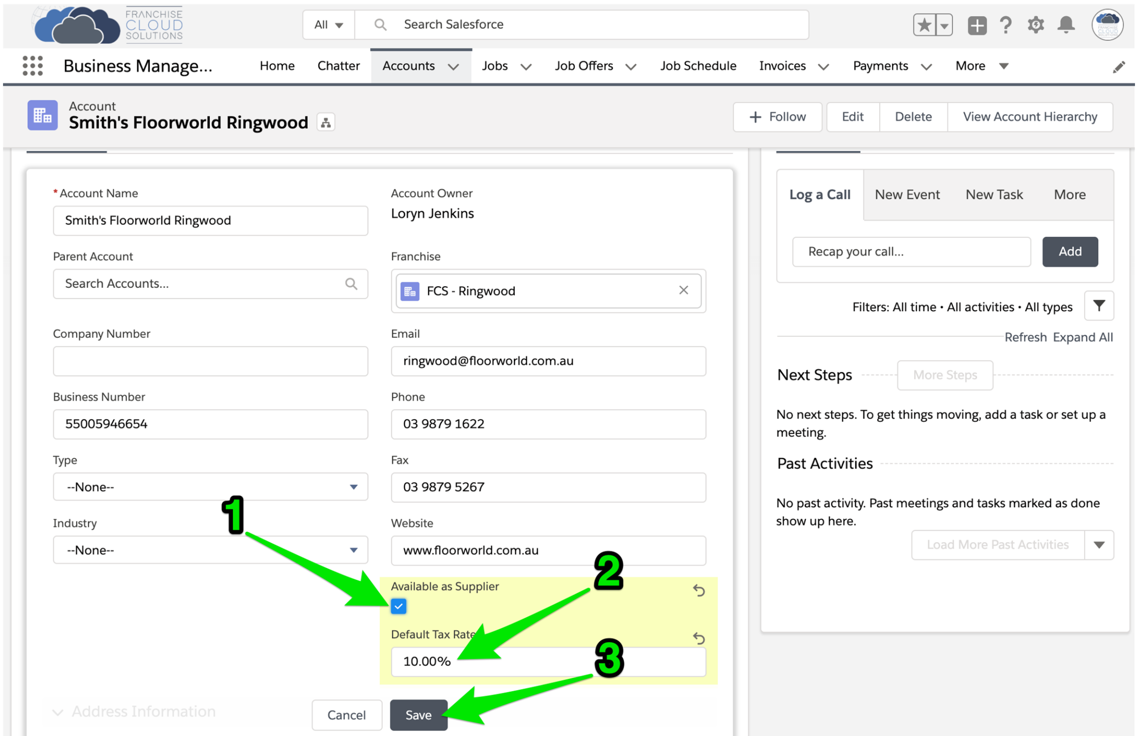


3. Now complete the account creation by entering all relevant details then pressing **Save**.

4. From the **Account**, press the **Edit** button.



5. Check `Available as Supplier`. Enter the `Default Tax Rate`, then press **Save**.



The account is now available in the system as a supplier.

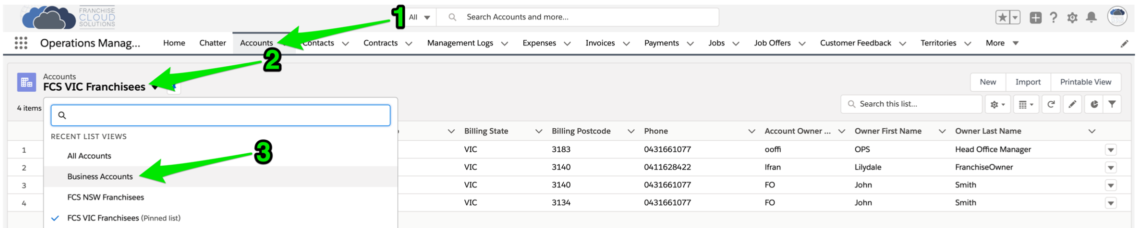
Creating a supplier invoice

Operations Management allows you to associate lines from a supplier invoice against a job. This allows you to track the expenses incurred by particular jobs.

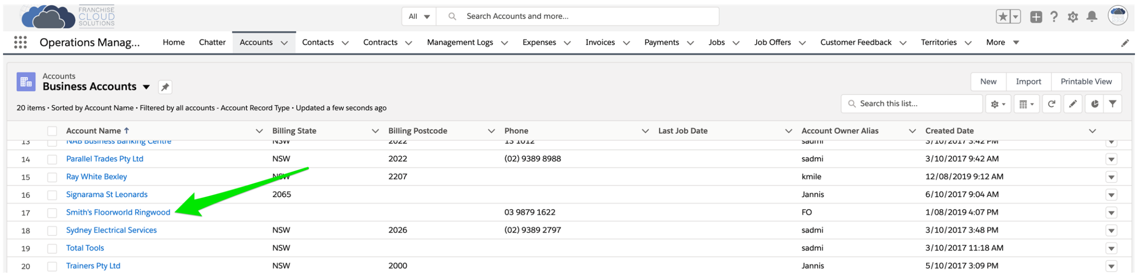
> You can also record purchases not intended for a job (i.e. purchases for stock). To do this, ensure the Job on the invoice line is blank.

To record a supplier invoice

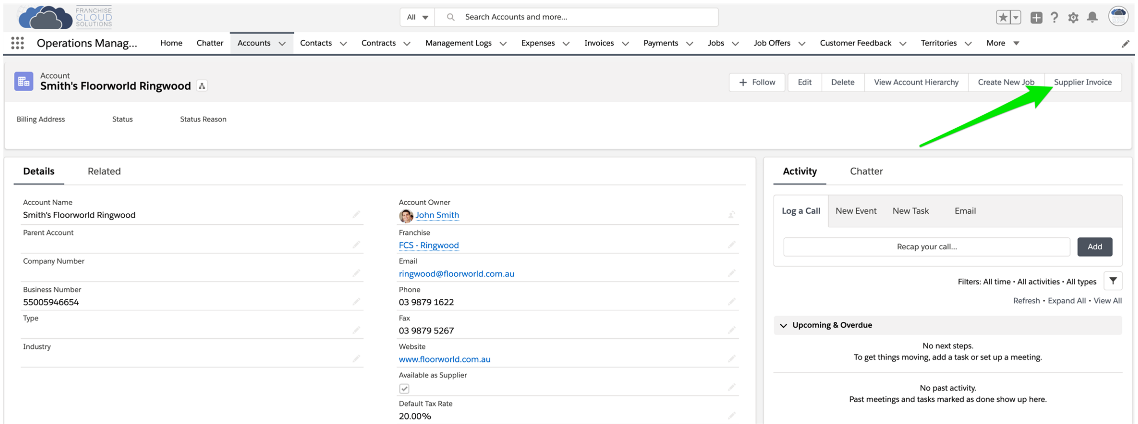
1. From the Salesforce **Accounts** list, select the **Business Accounts** list view.



2. Select the target supplier account.

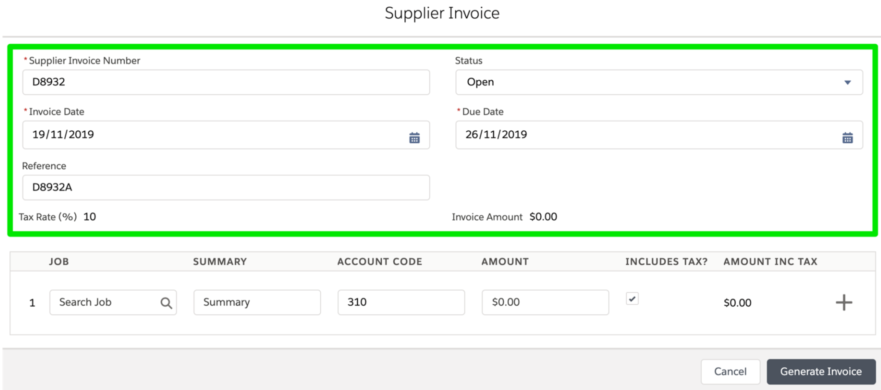


3. From the **Account** page, press **Supplier Invoice**.

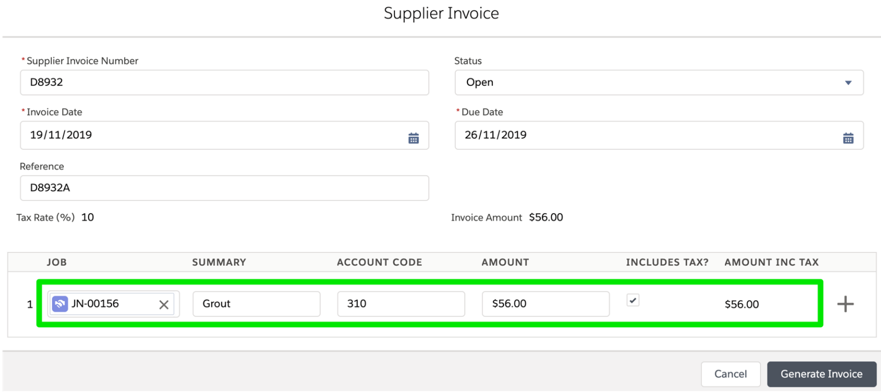


The **Supplier Invoice** dialog box appears.

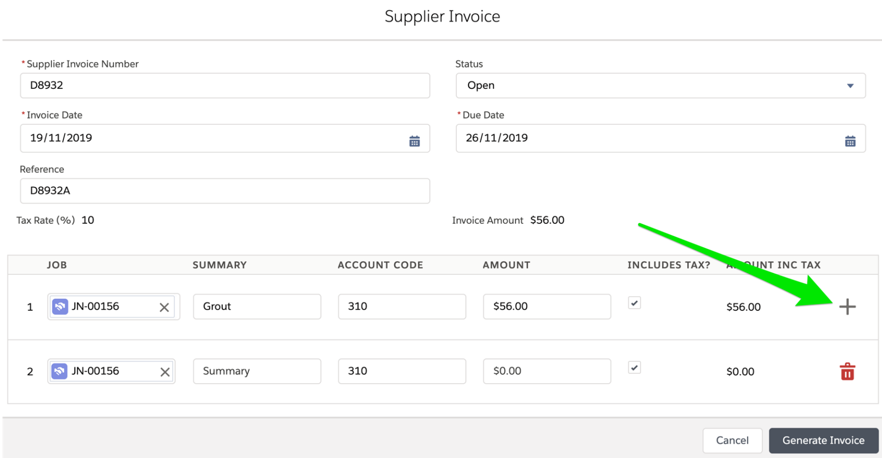
4. Enter the supplier invoice header details.



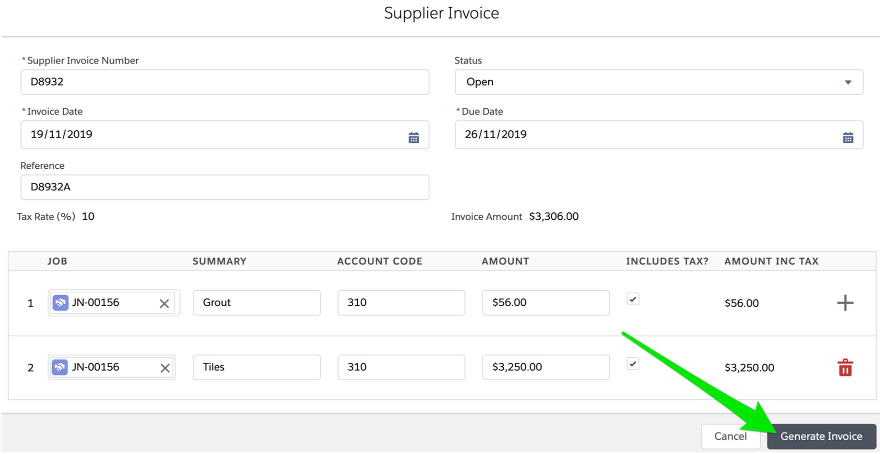
5. Now enter the first line, attributing the line to a job in the system.



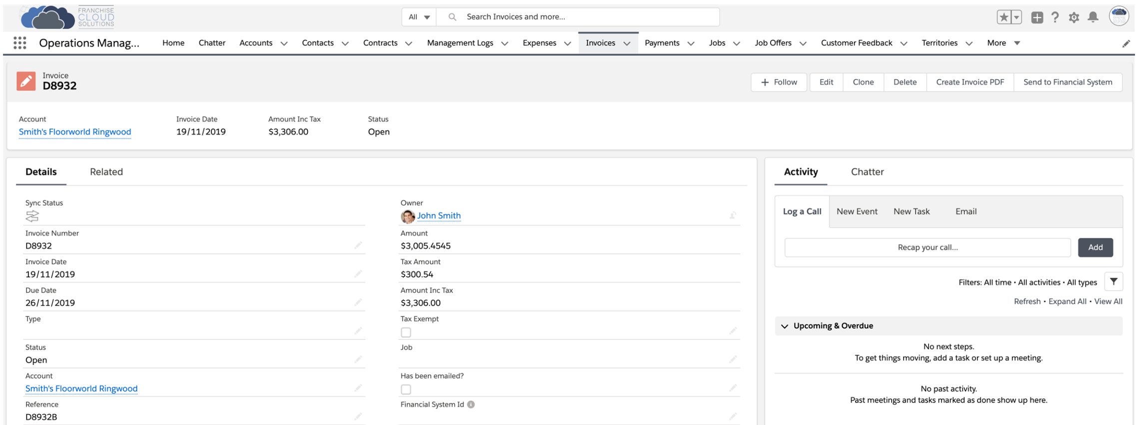
6. Press the + button to add a second line.



7. When the invoice is complete, press **Generate Invoice**.



8. The supplier invoice is now generated.



Supplier Invoices are optionally synchronized with Xero. To send a Supplier Invoice to Xero, press the **Send to Financial System** button.

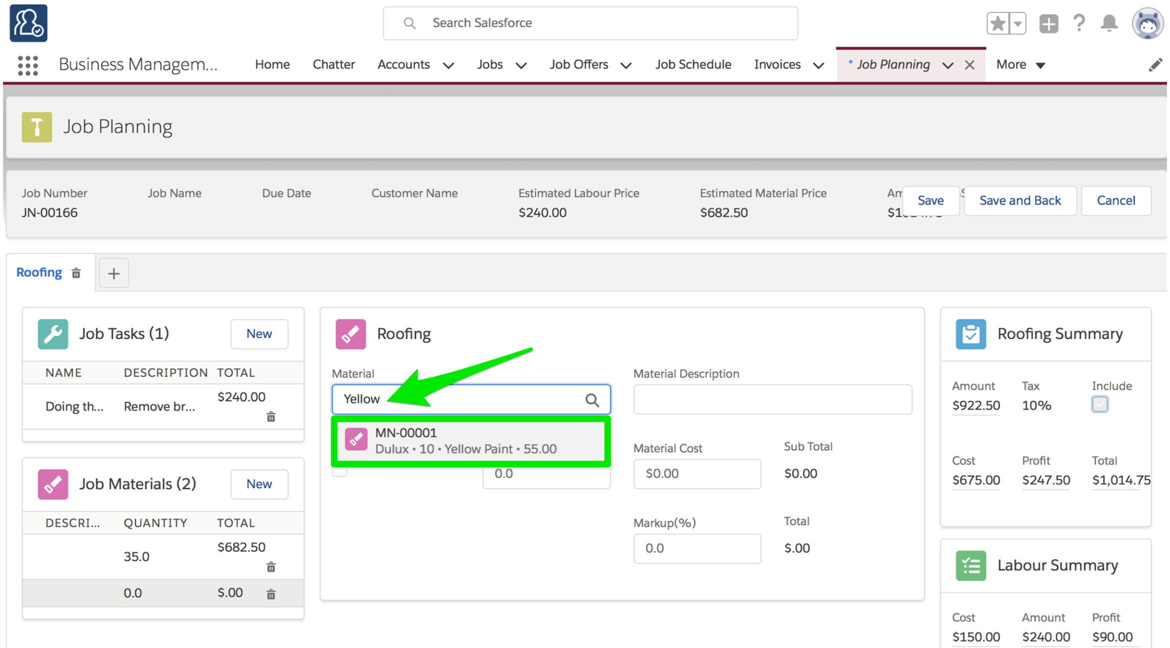
CHAPTER 10

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.

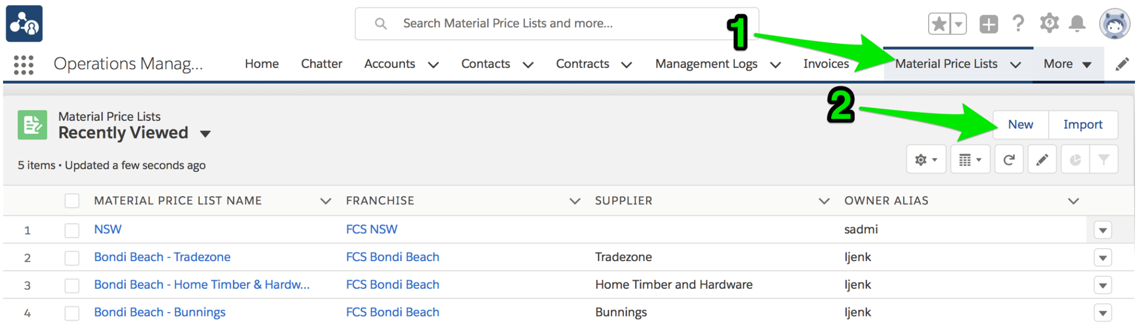
Creating a material price list

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.

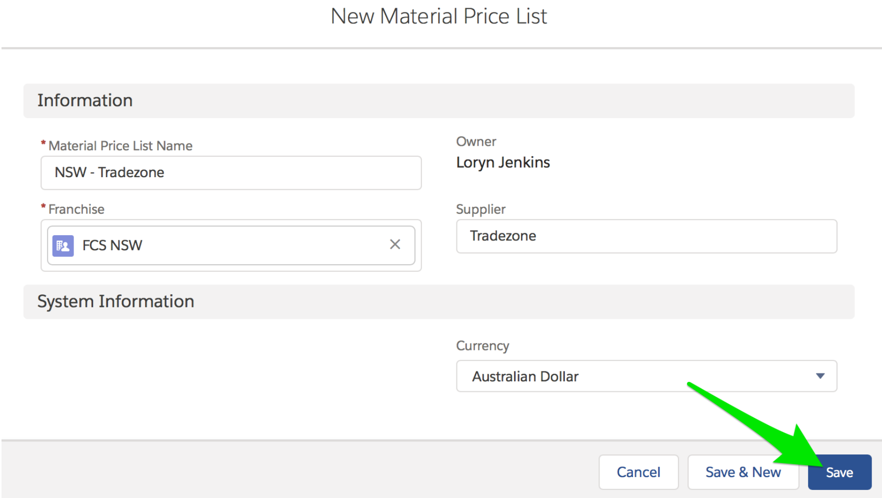
To create a price list

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

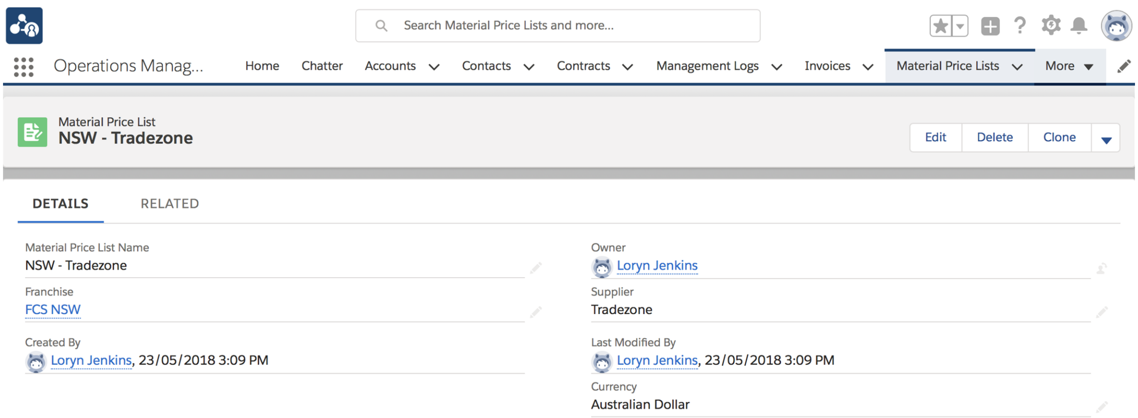


The **New Material Price** list dialog box displays.

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



The new price list displays.

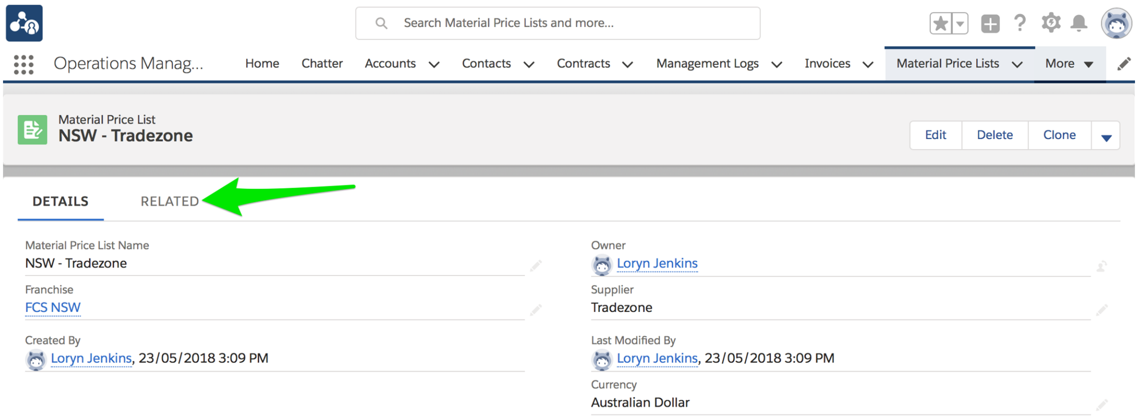


Adding a material

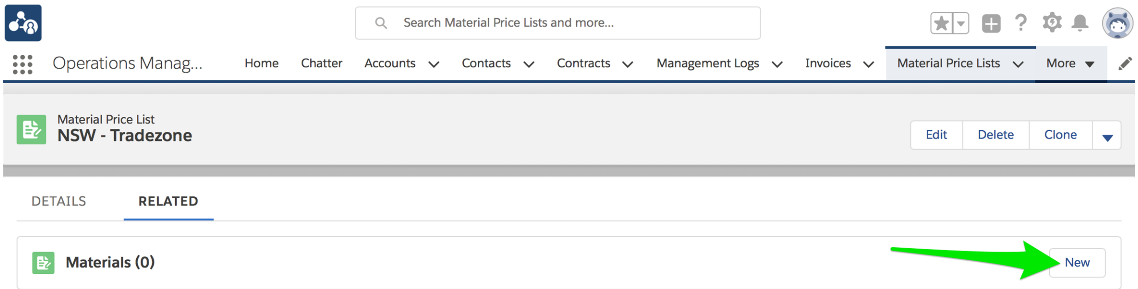
Once you have created a price list, you will want to add the most commonly purchased items from that supplier to the price list.

To add a material to a price list

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

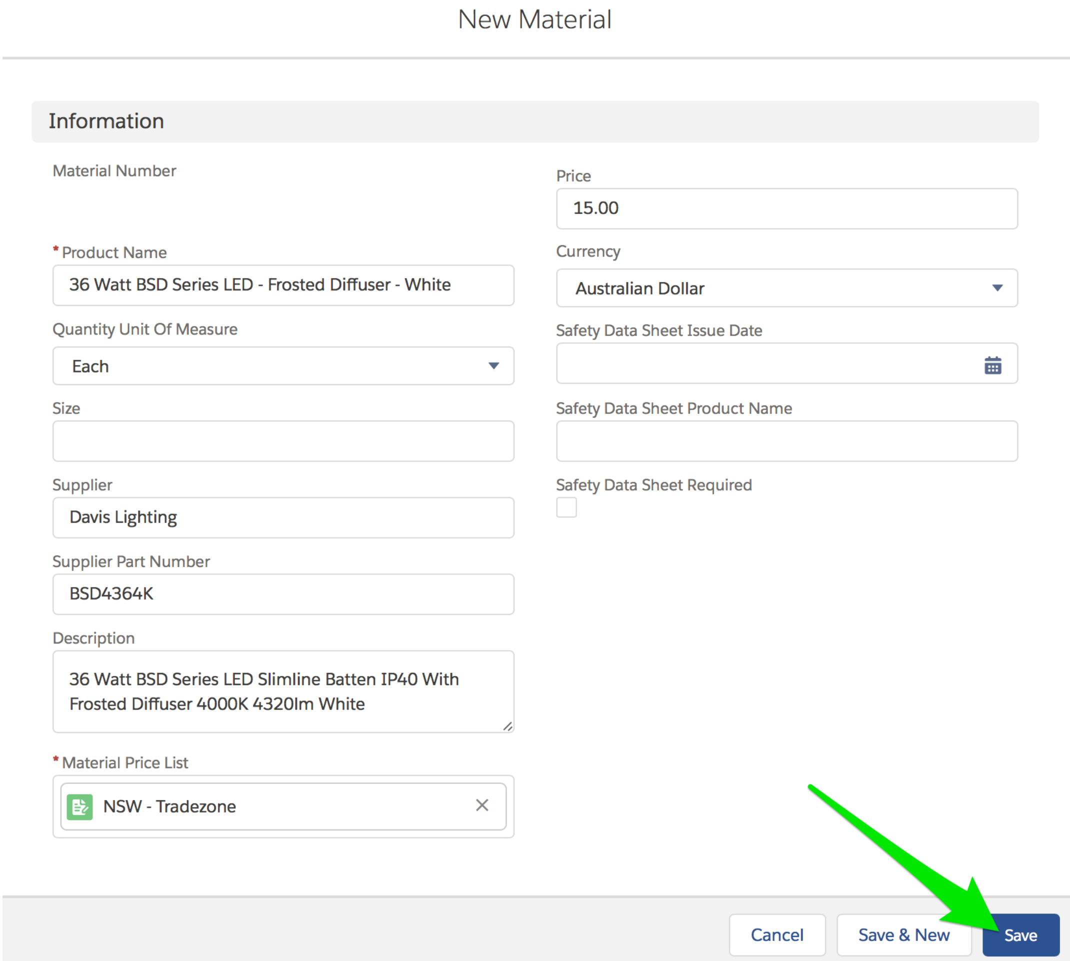


2. From the **Materials** section, press **New**.

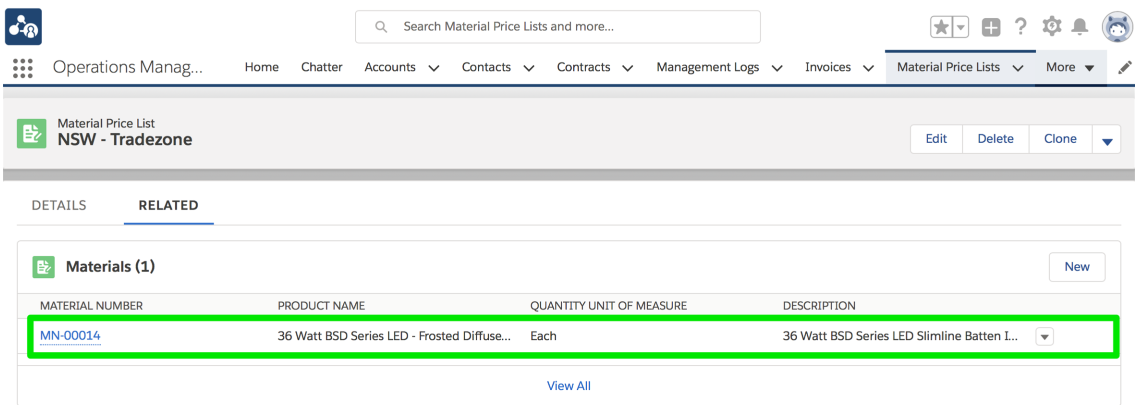


The **New Material** dialog box displays.

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.

CHAPTER 11

Customer Communications

Working with franchisees on the phone

Operations Management provides a range of tools for franchisors to be able to quickly and easily field franchisee requests. The following topics deal with a range of tasks common to Account, Contract, Invoice, Management Log or Customer Feedback records, encompassing taking notes, creating follow up tasks, sending emails, and scheduling meetings.

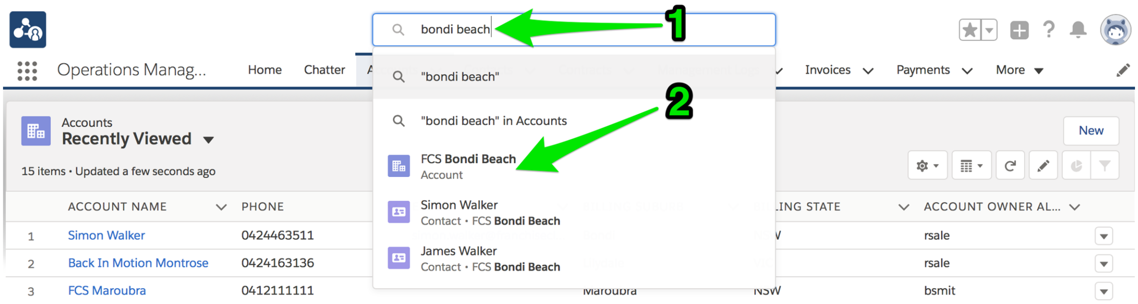
> Be aware that the use of these features on Accounts, Contracts and Invoices create records that are visible to franchisees. To create compliance-related records that are not visible to franchisees, *See* "Working with Management Logs" on page 175.

How to locate the right record

When a customer or franchisee contacts you, you need to locate the right record so that you can record new information and update existing information in the right place.

To locate a person's record

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

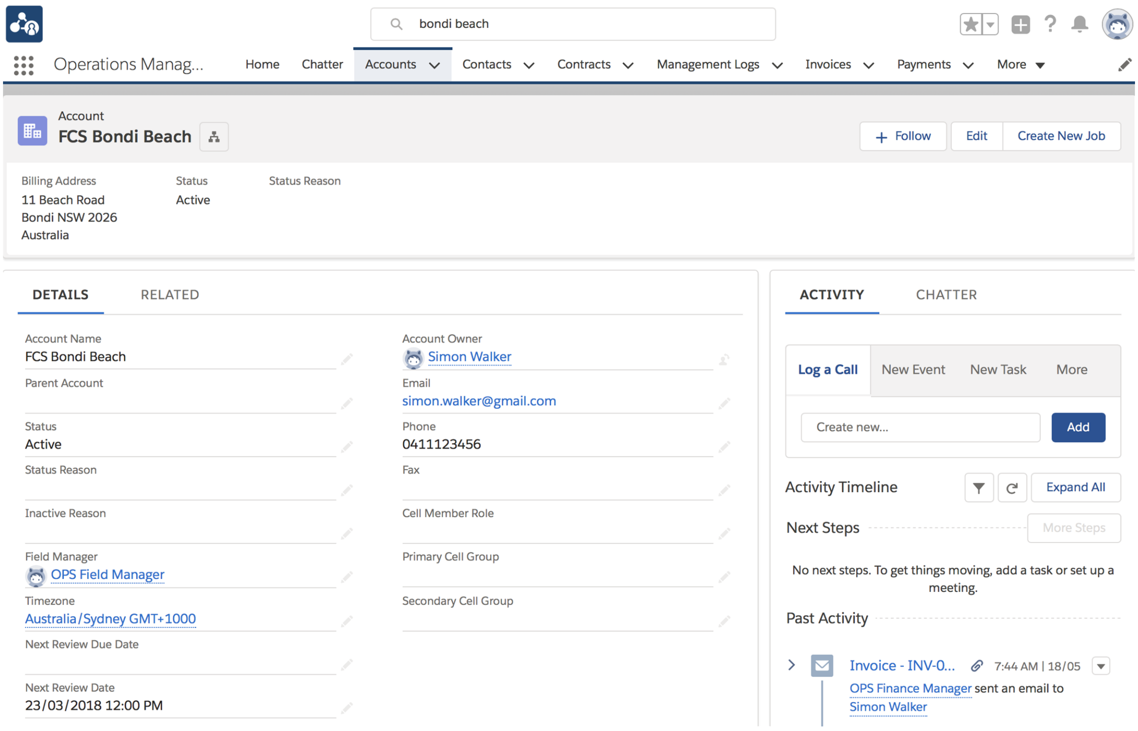


Salesforce displays a list of records that match the name you entered. The type of each record is displayed.

2. If you see a corresponding **Account**, select the account.

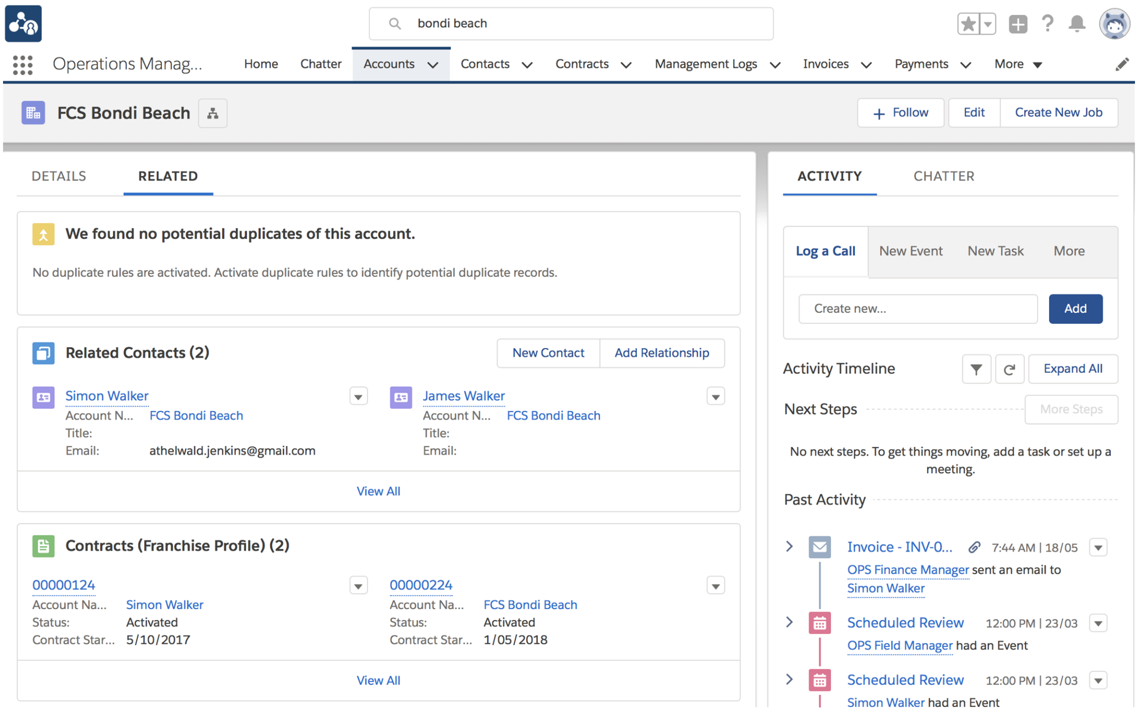
> If you do not see the person's account, go to step 5.

Within the **Account**, you have access to all their recent details and preferences.

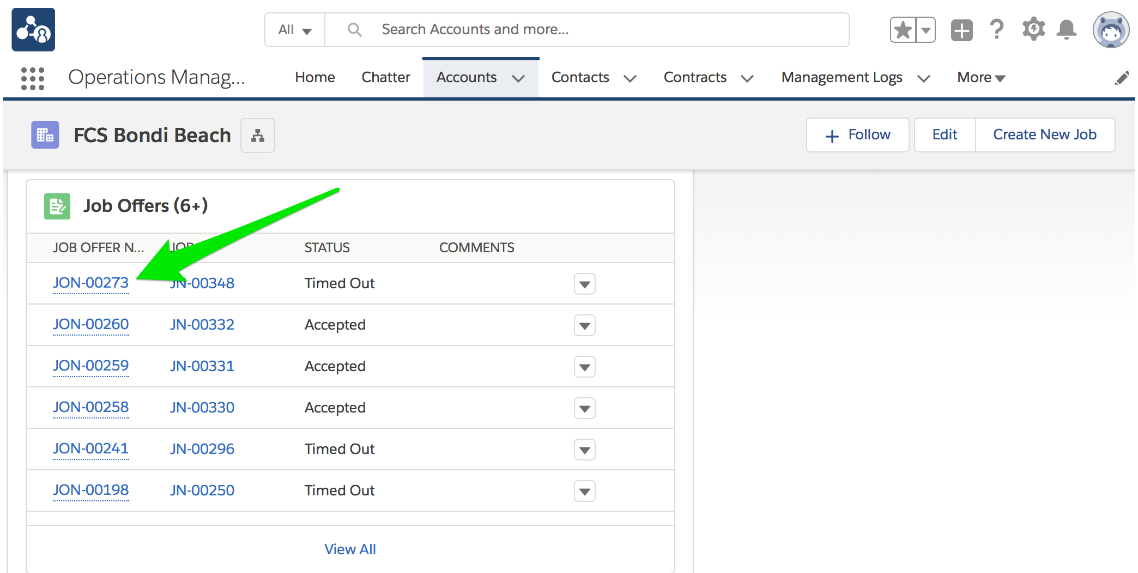


- Name and contact details
- Address information
- Summary of invoices and payments owing
- Marketing information and communication preferences

3. To see current and historical jobs, contracts, territories, management logs, invoices, job offers, expenses, expense line items and business hours, select the **Related** tab.



4. If the inquiry relates to a job, a job offer, or any other type of record, you can reach the record by clicking on the record number.

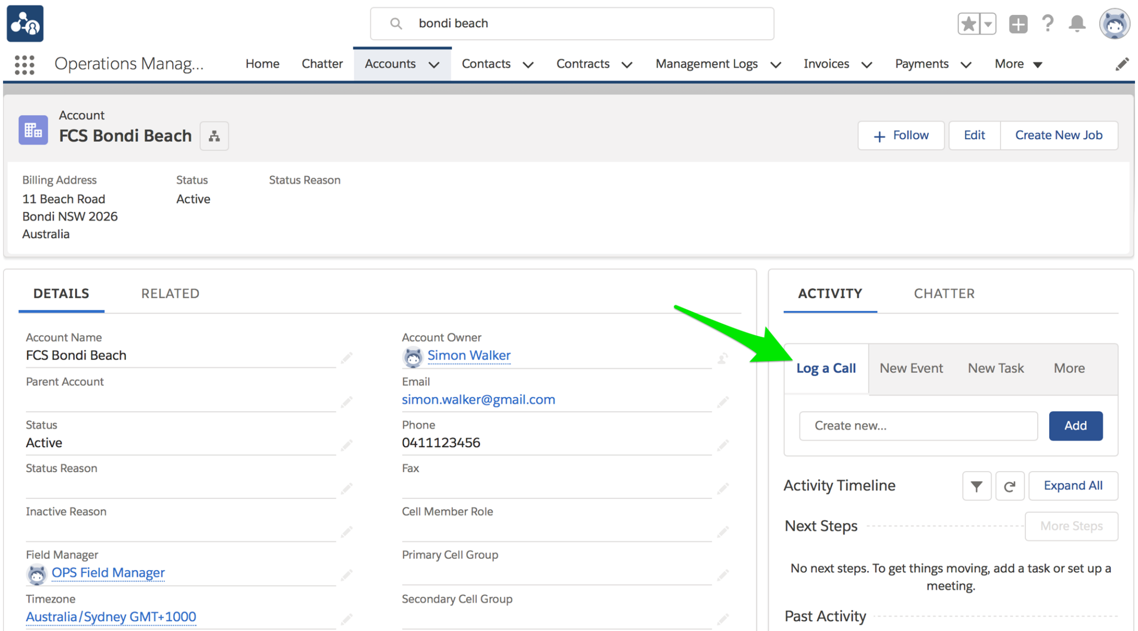


How to capture the outcomes of phone calls

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

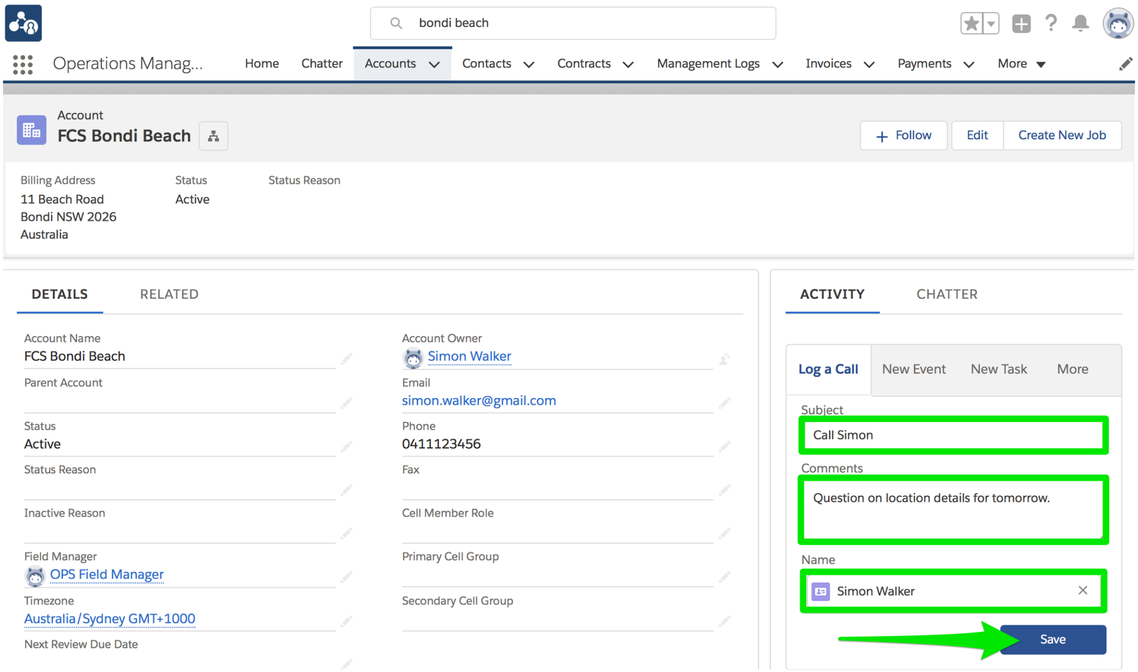
To record information

1. Locate the Account, Contract, Invoice, Management Log or Customer Feedback. *See* "How to locate the right record" on page 242.
2. From the **Activity** pane's **Log a Call** tab, press **Create new...**

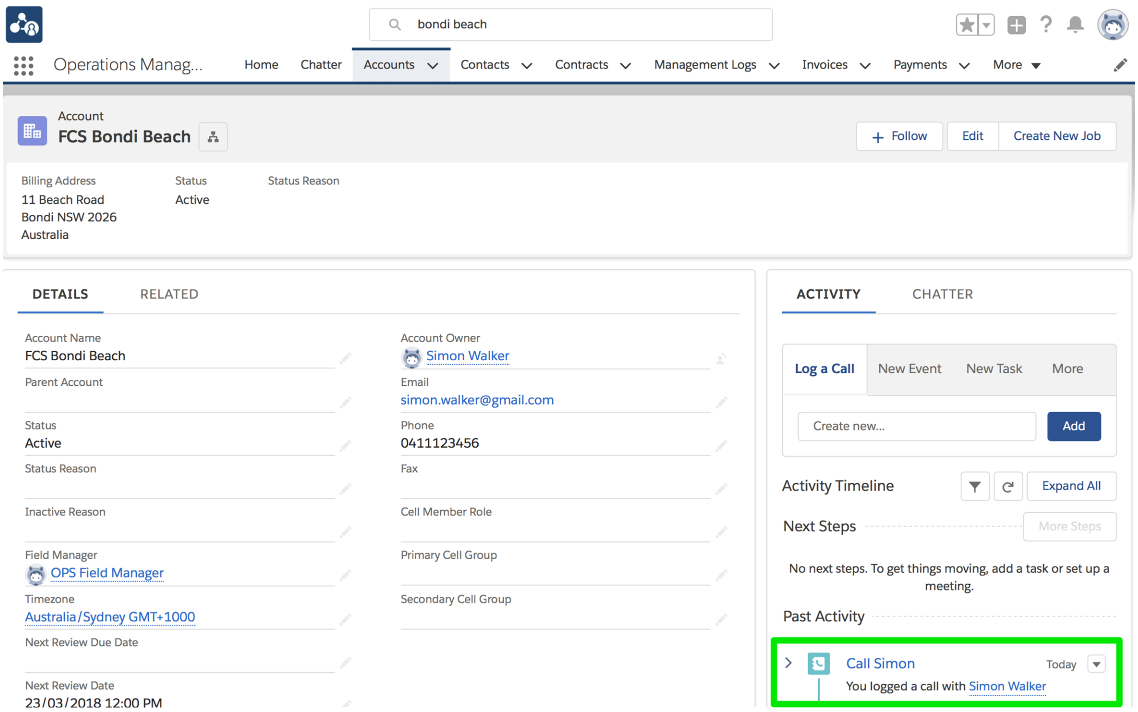


The **Log a Call** activity pane displays.

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



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

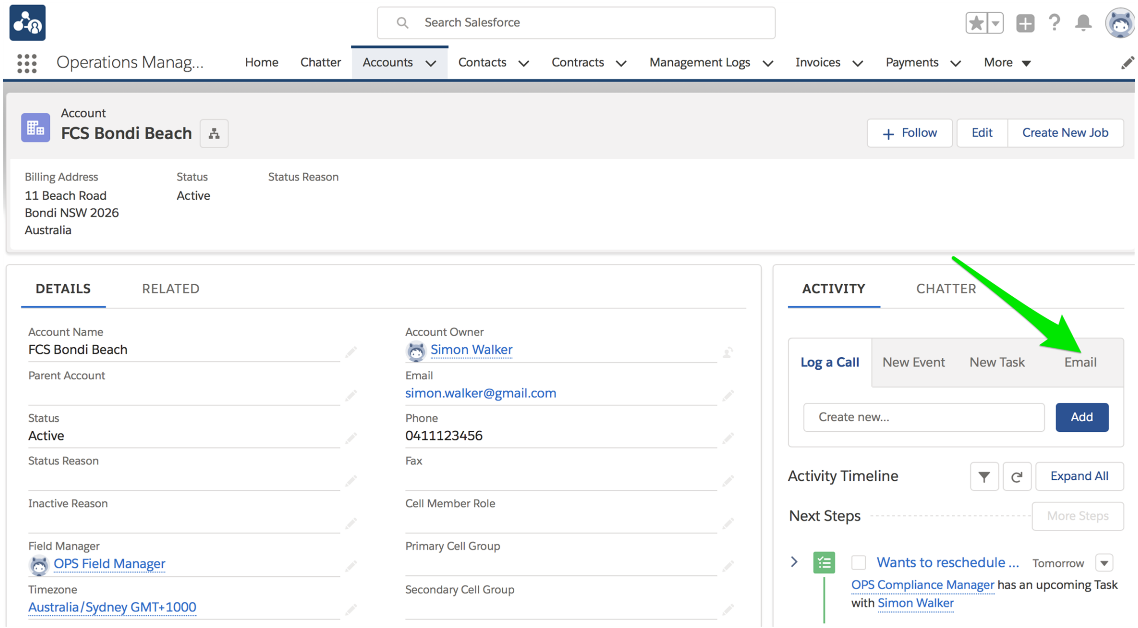


How to send an email

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

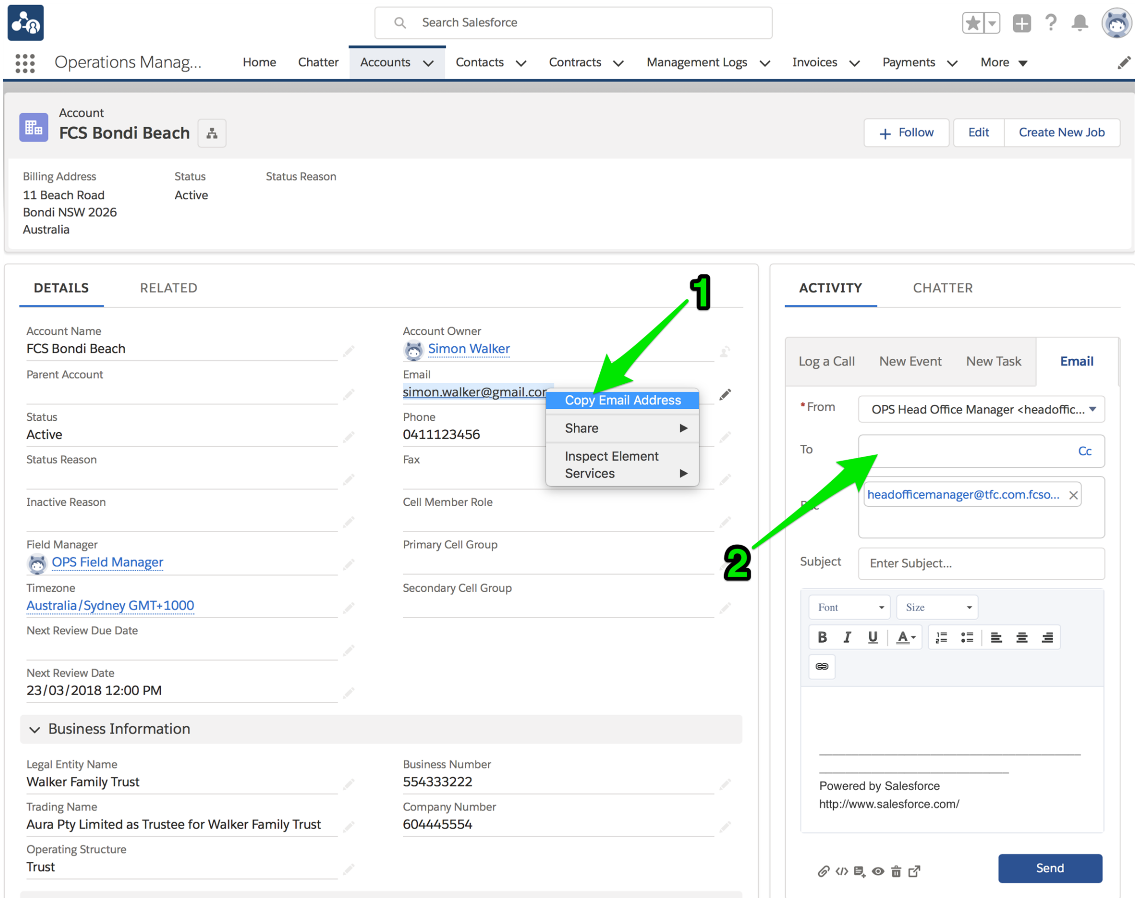
To send an email

1. Locate the Account, Contract, Invoice, Management Log or Customer Feedback. *See* "How to locate the right record" on page 242.
2. From the **Activity** pane, select the **Email** tab.

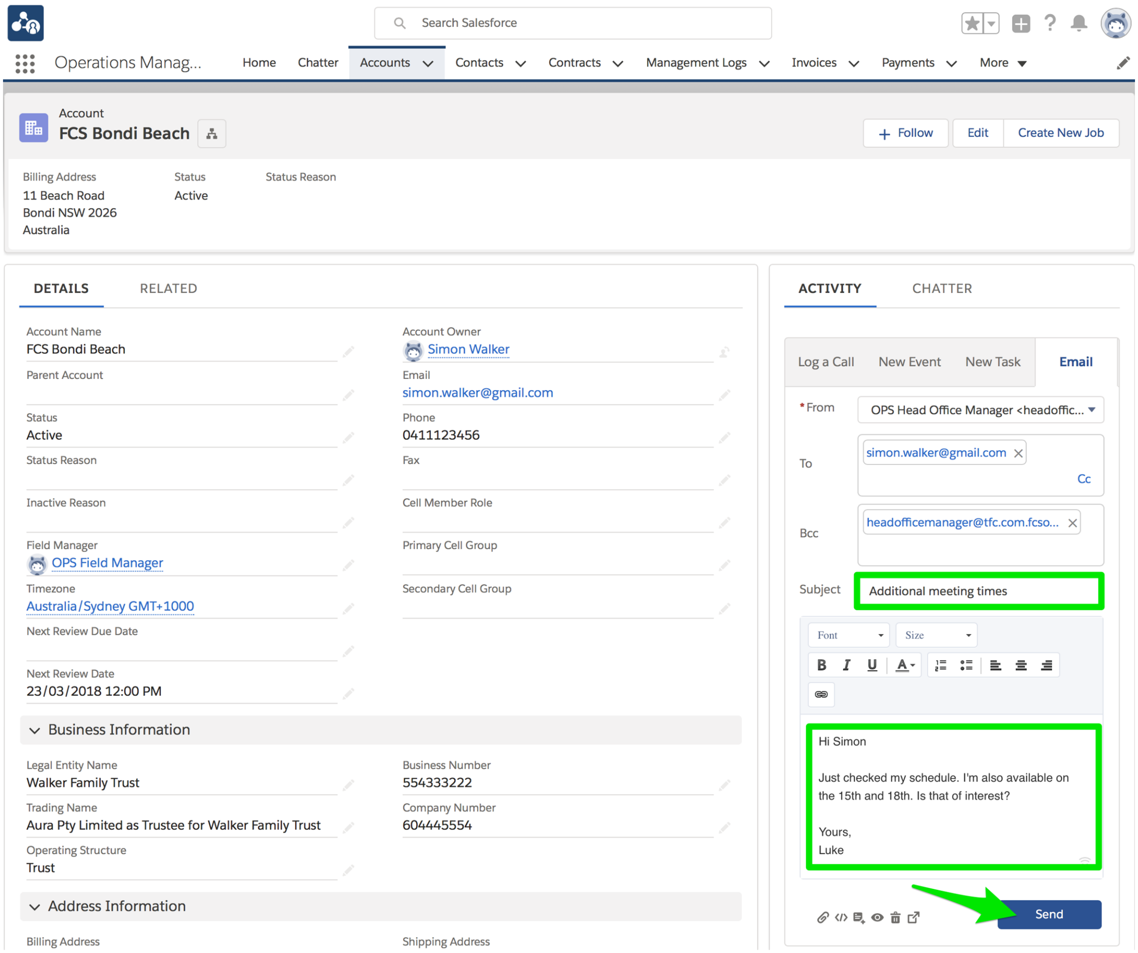


The **Email** tab displays, and shows the owner of the record in the `From` address.

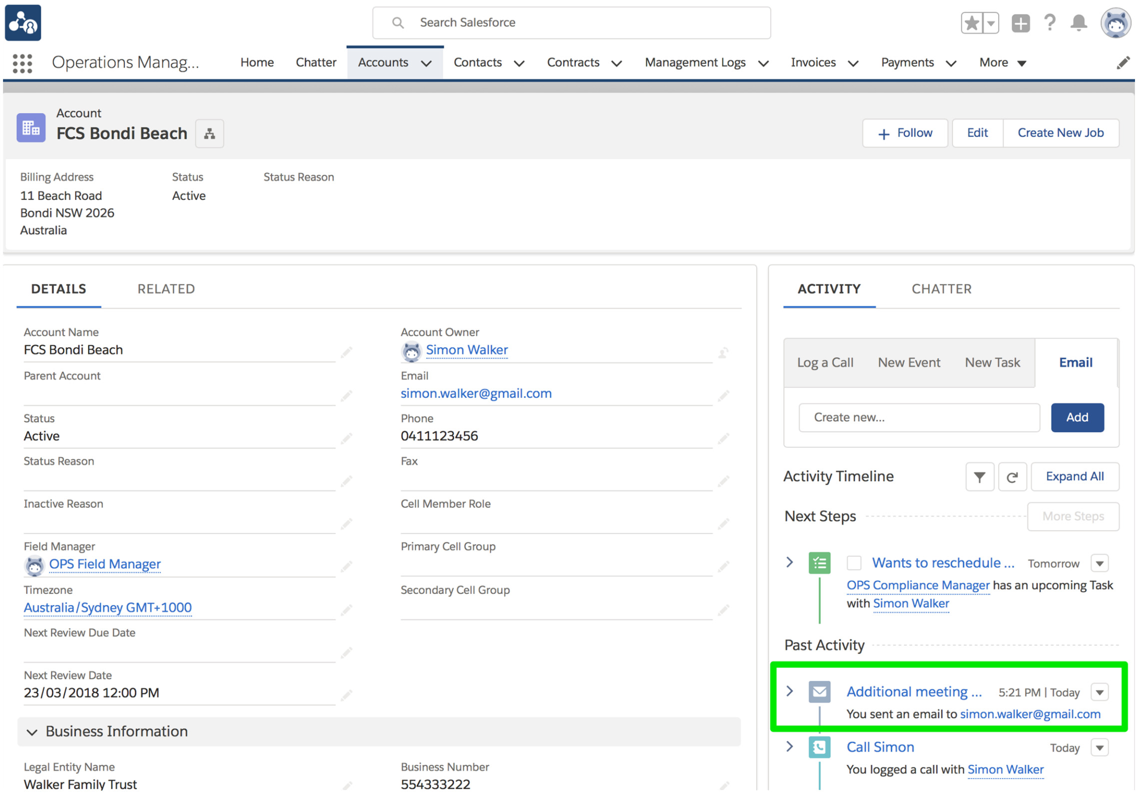
3. Copy the email address from `Account Name` and paste it into the `To` field.



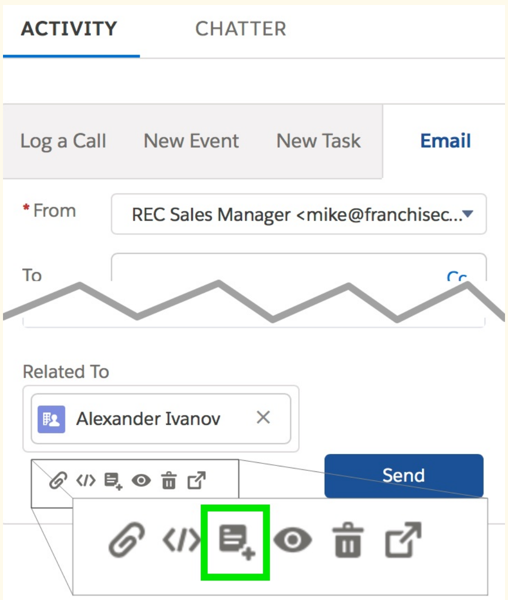
4. Complete `Subject` and `Details` then press **Send**.



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



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



How to confirm a scheduled appointment with a franchisee

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

To send a meeting invite or appointment confirmation

- Use **Management Logs** selecting the **Meeting** type, which contains automated invitation reminders. *See* “Working with Management Logs” on page 175.

Working with emails and templates

You can configure email templates to suit your organization.

How to set up an email signature block

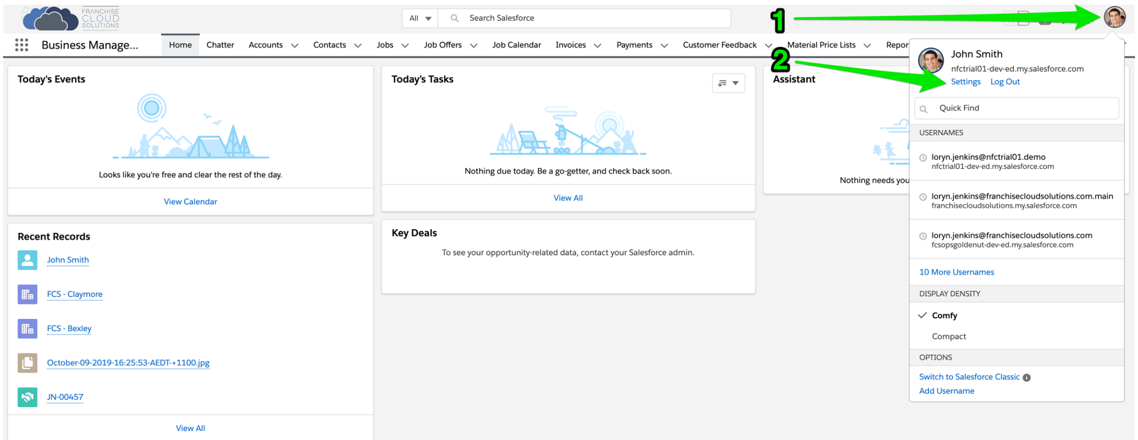
Setting up a signature block is something almost everyone does when they first set up their personal settings within Salesforce.

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

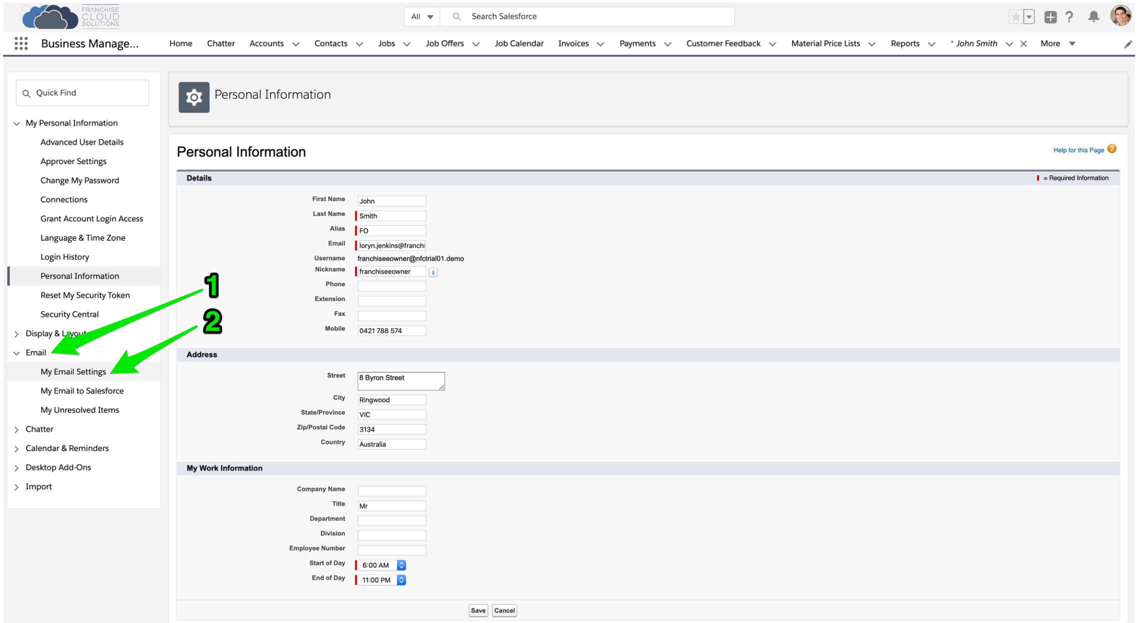
> Ask your system administrator for a signature block URL.

To set up a signature block

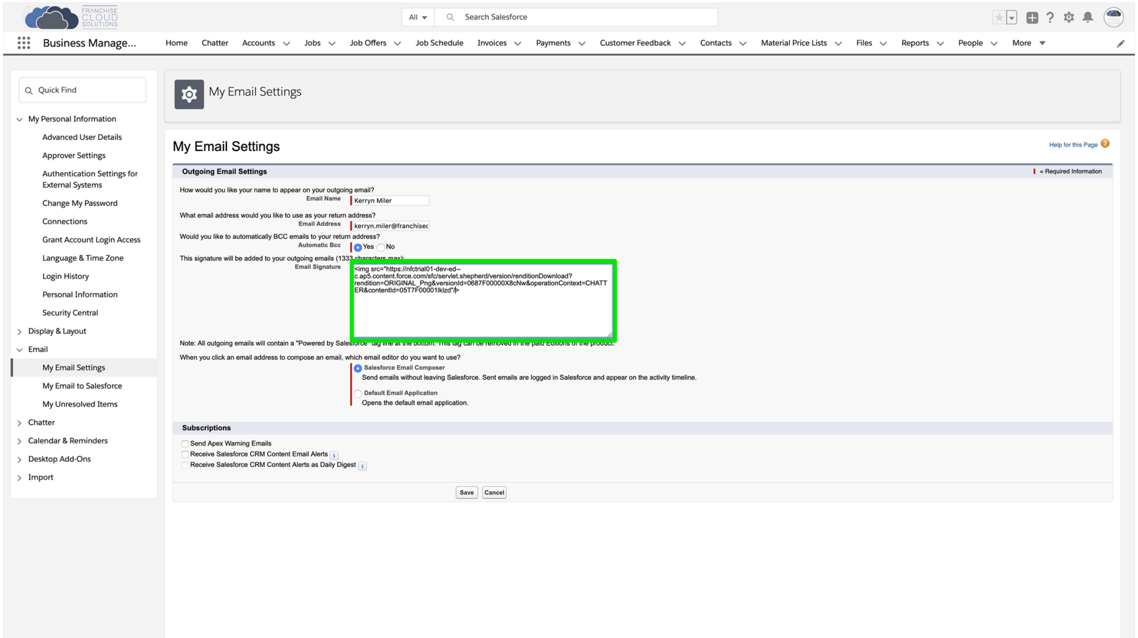
1. Obtain the signature block URL from your system administrator.
2. Go to your personal **Settings**.



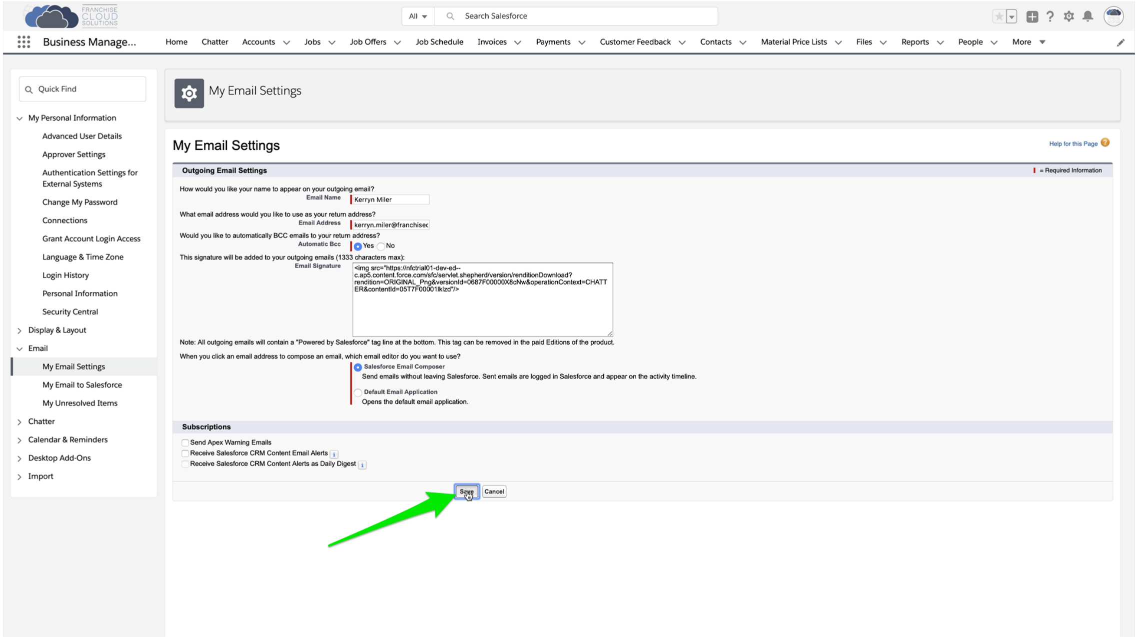
3. Go to **My Email Settings**.



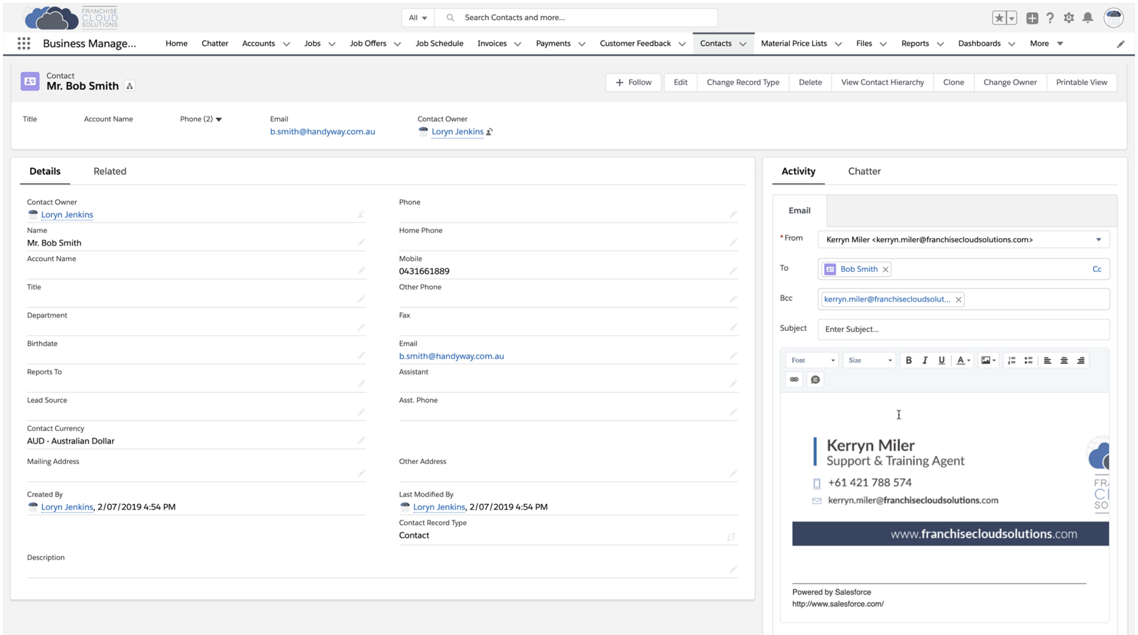
4. Paste the URL provided by your system administrator.



5. Press **Save**.



6. The email signature block will now appear within your emails.

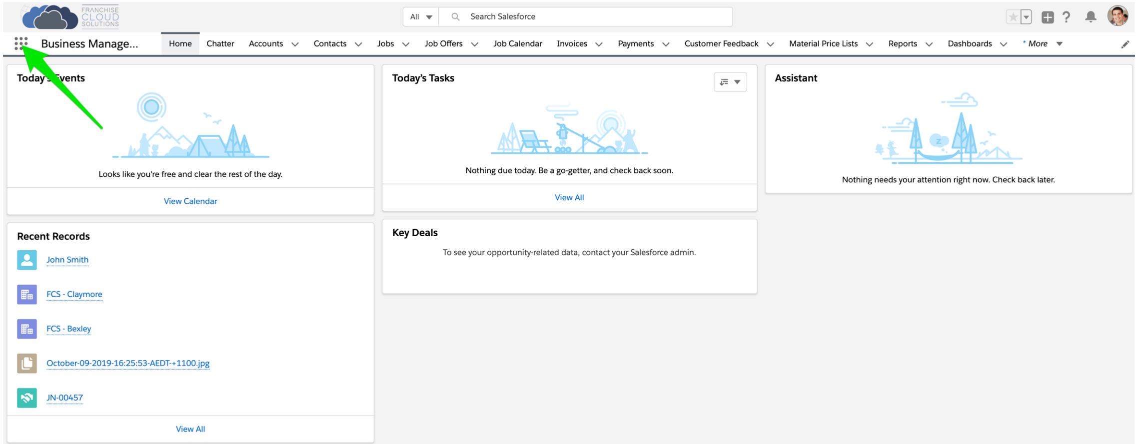


How to edit email template headers and footers

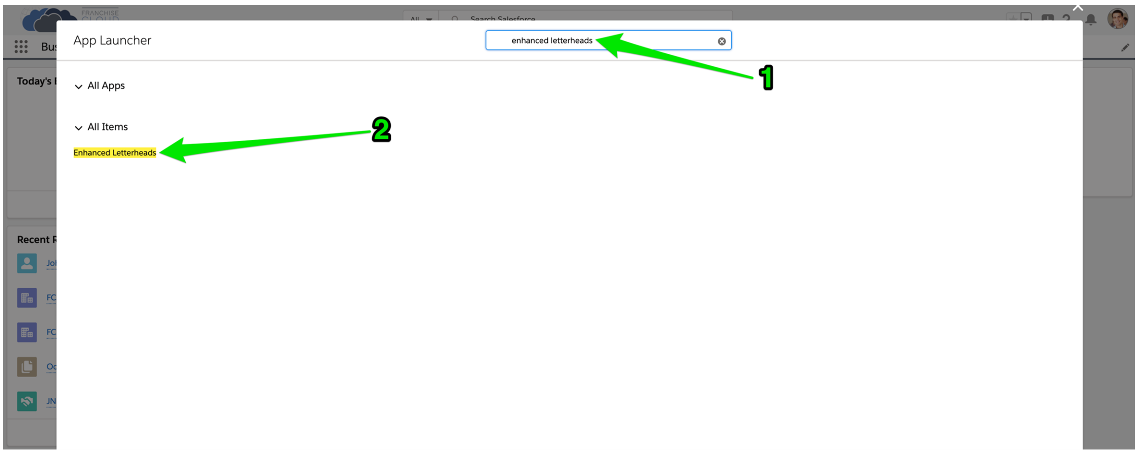
Most likely you will have created branded headers and footers for use with all email templates.

To review the branded email headers and footers

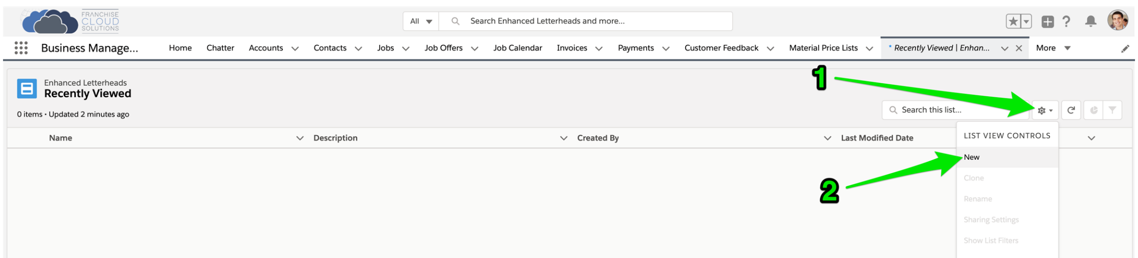
1. Open the **App Launcher**.



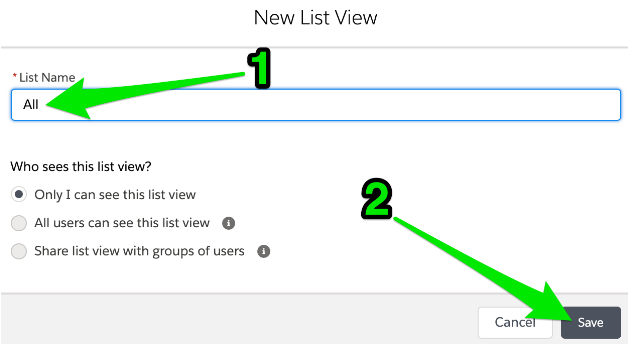
2. In the **App Launcher** `Search` box, enter *`enhanced letterheads`* and select the **Enhanced Letterheads** link.



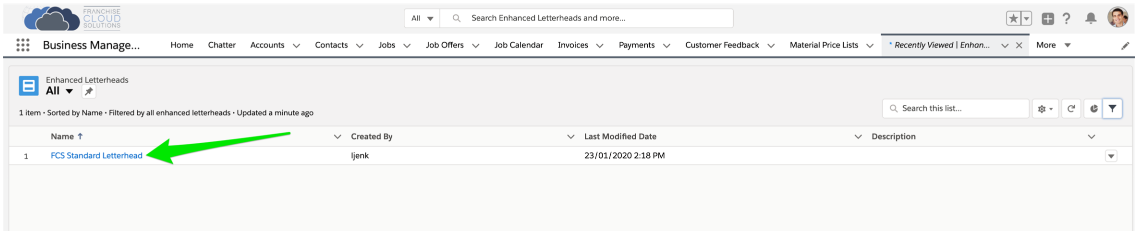
3. You may see an empty **Enhanced Letterheads** list. To see any of the letterheads, create a **New** list view.



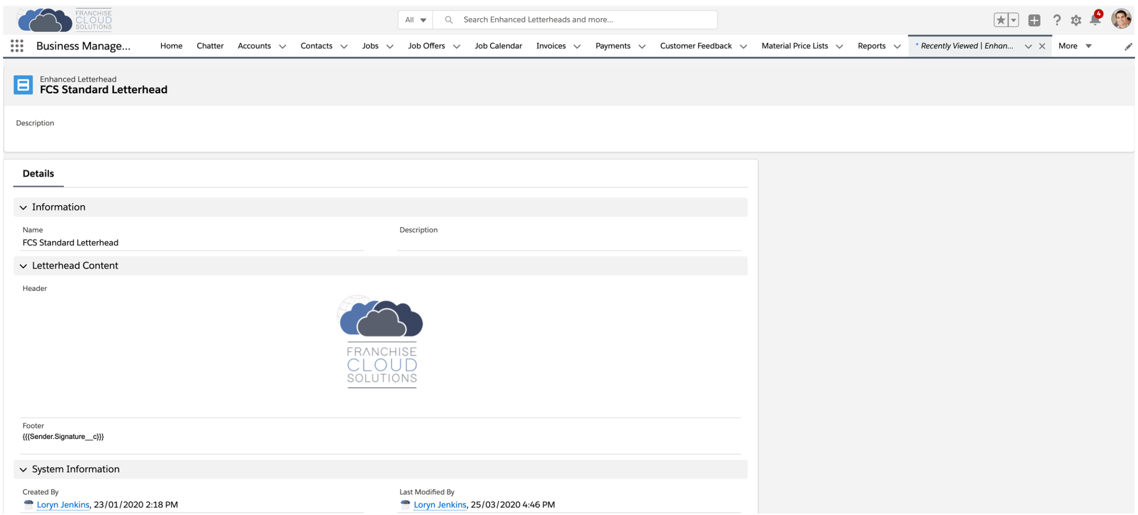
4. Name the list view and press **Save**.



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” below.

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

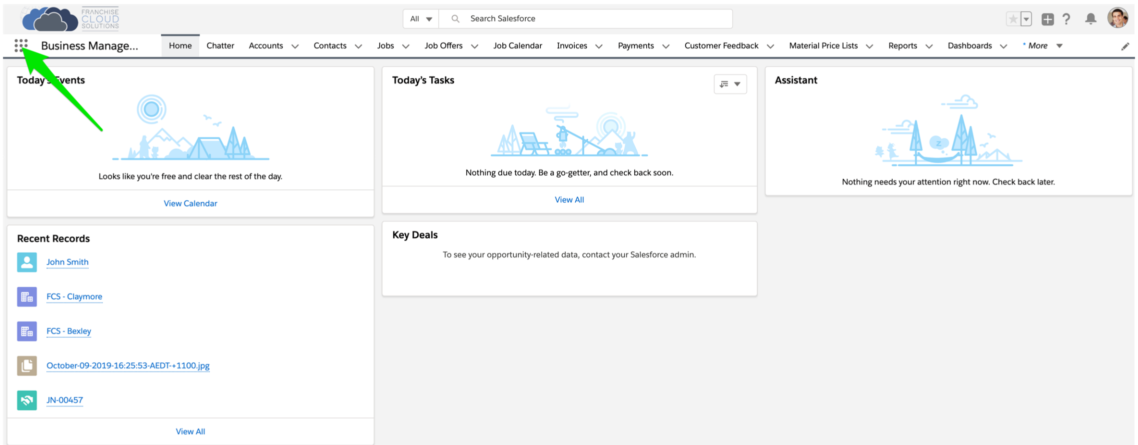
- customized header and footers
- boilerplate text
- variables that draw information from the

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

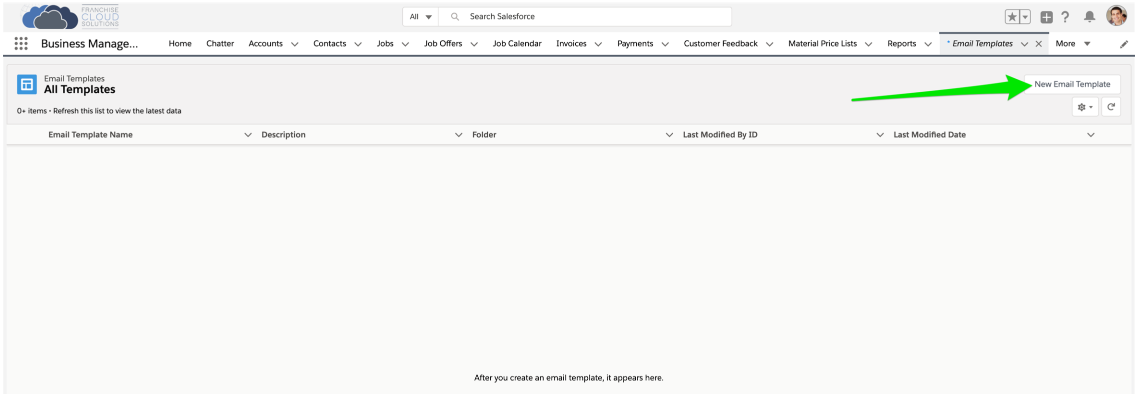
To create a custom email template

1. Open the **App Launcher**.

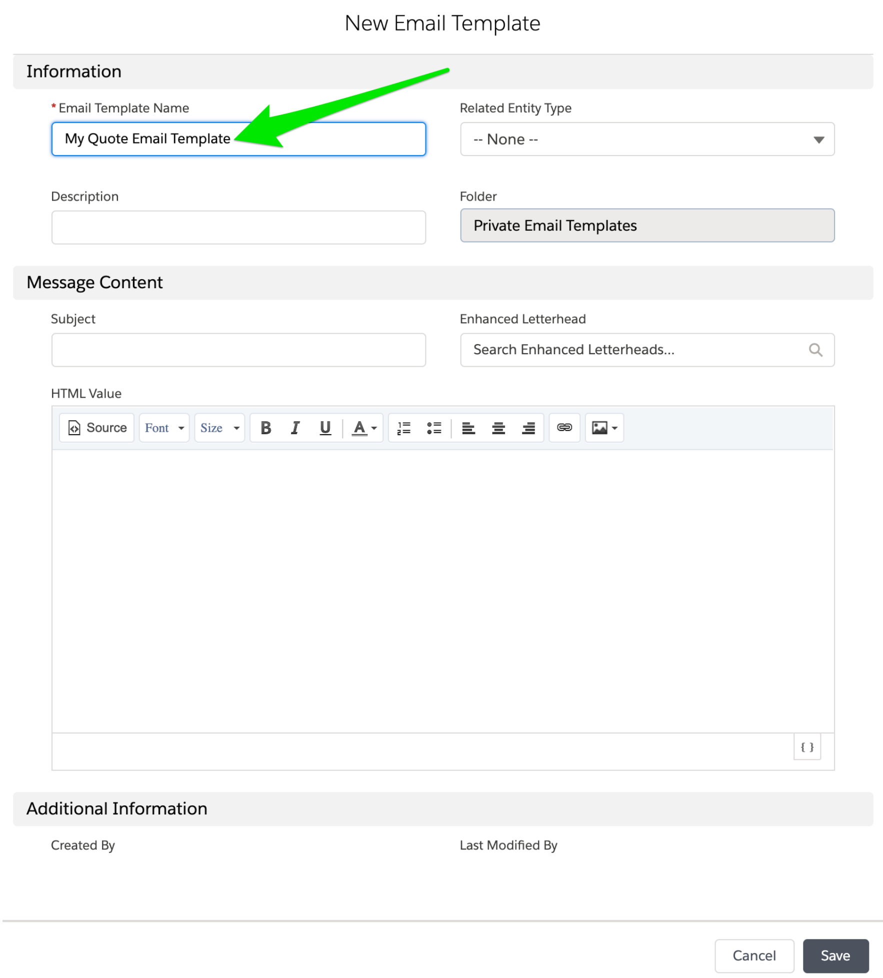


2. In the **App Launcher** `Search` box, enter *`email templates`* and select the **Email Templates** link.

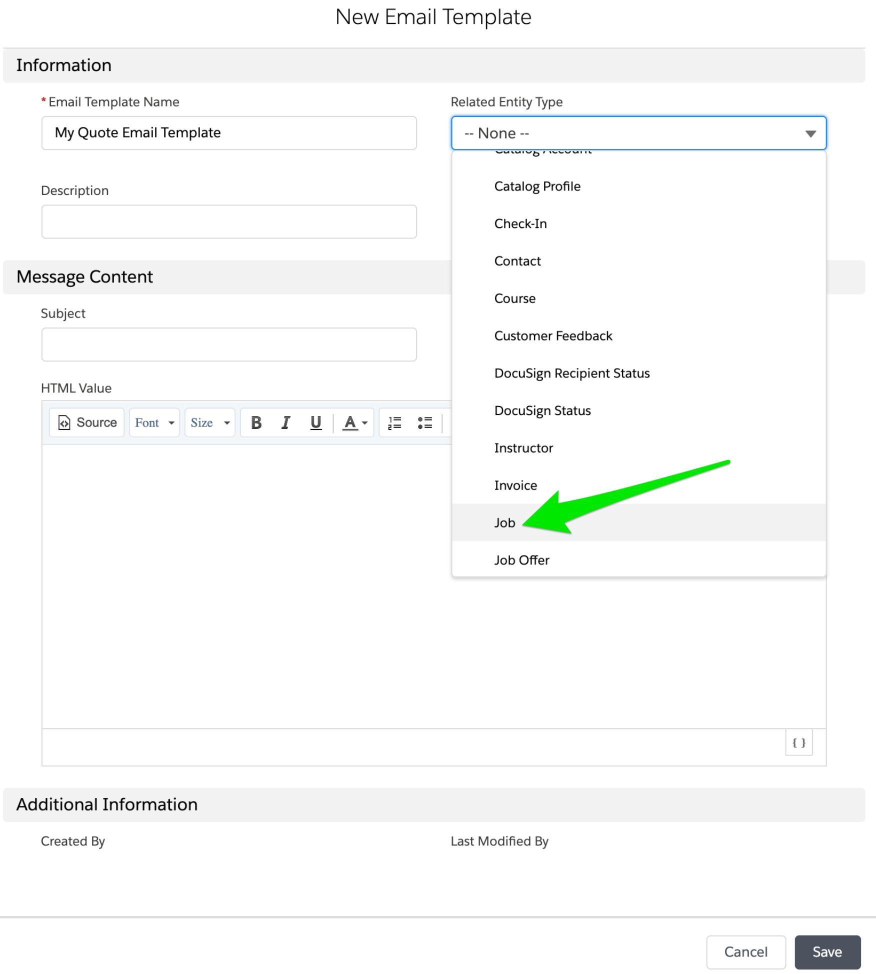
3. You may see an empty **Email Templates** list. Press **New Email Template**.



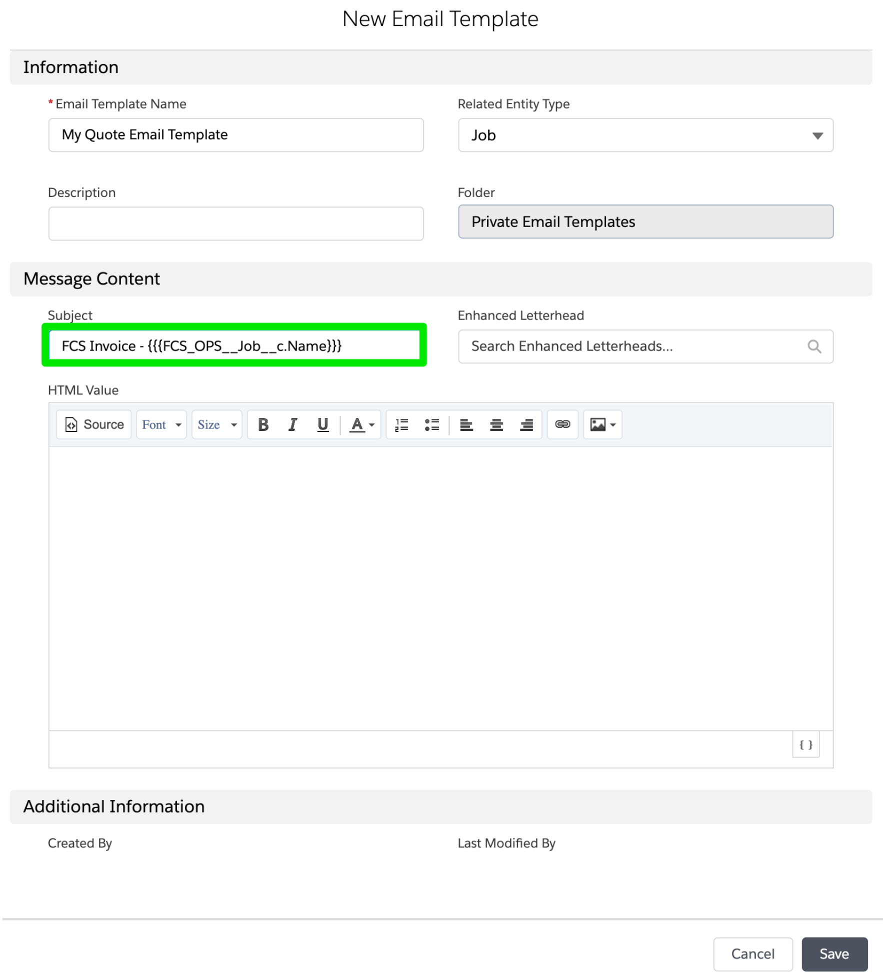
4. Insert an email template name that will help you identify it.



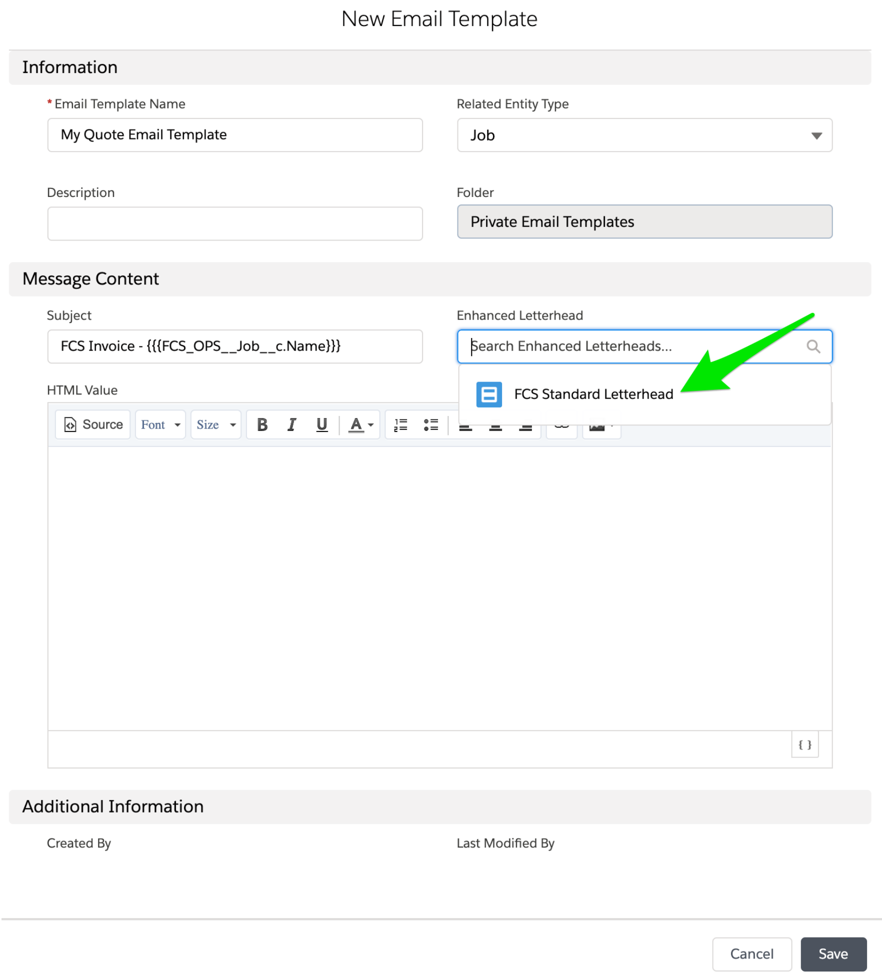
5. If you are going to use merge fields, you must base the email template off a particular entity type.



6. Enter an email subject line.

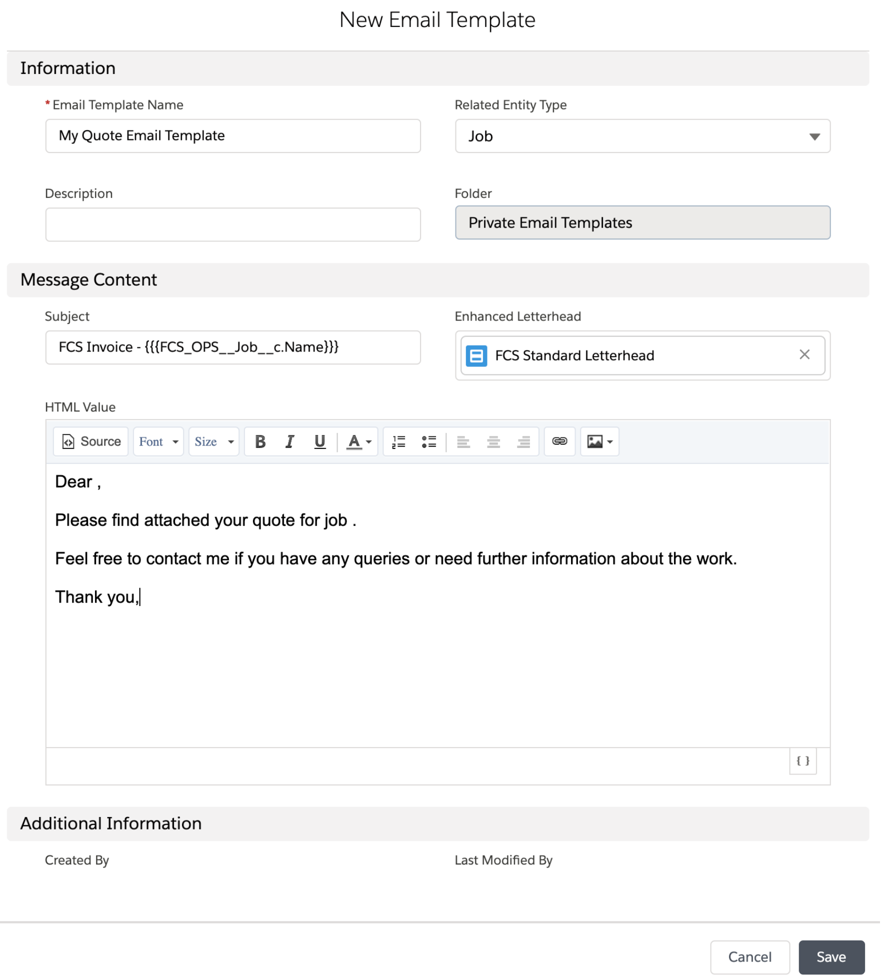


7. Select an appropriate letterhead.

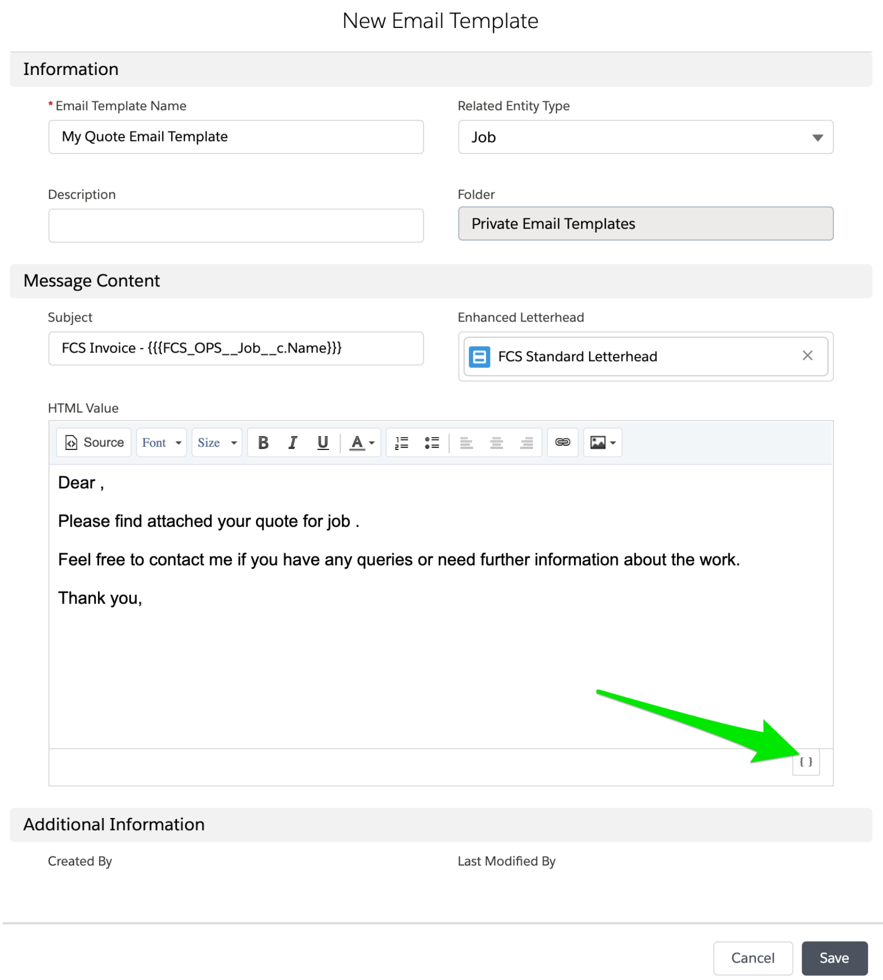


You can review the available letterheads. *See* “How to edit email template headers and footers” on page 254.

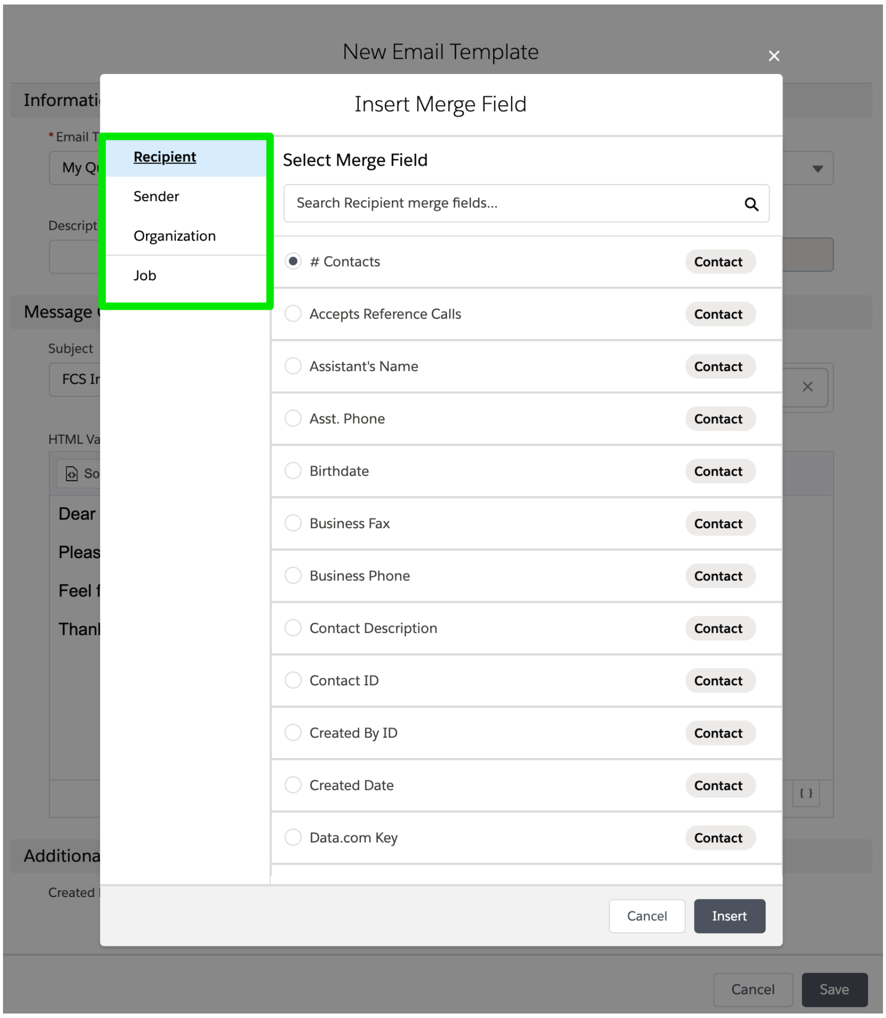
8. Enter boilerplate text into the `HTML Value` field.



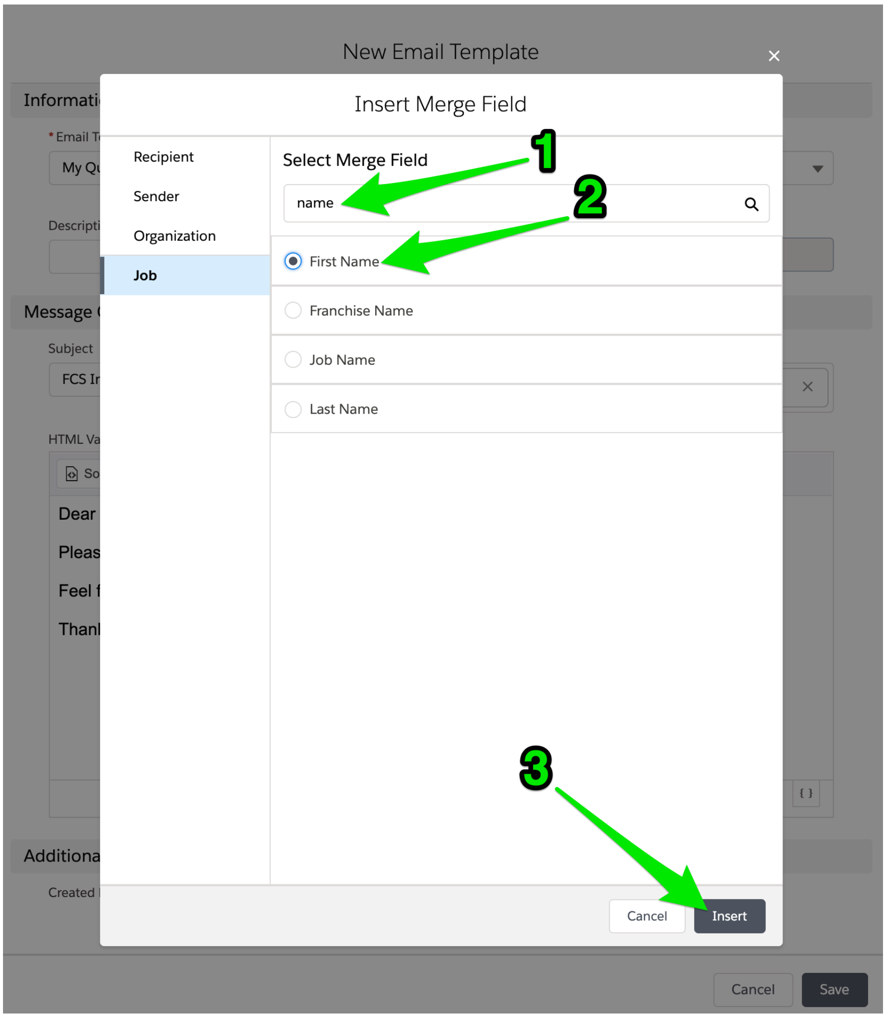
9. To insert variables into the email template body, press the **Insert Merge Field** button (i.e. the brace button { }).



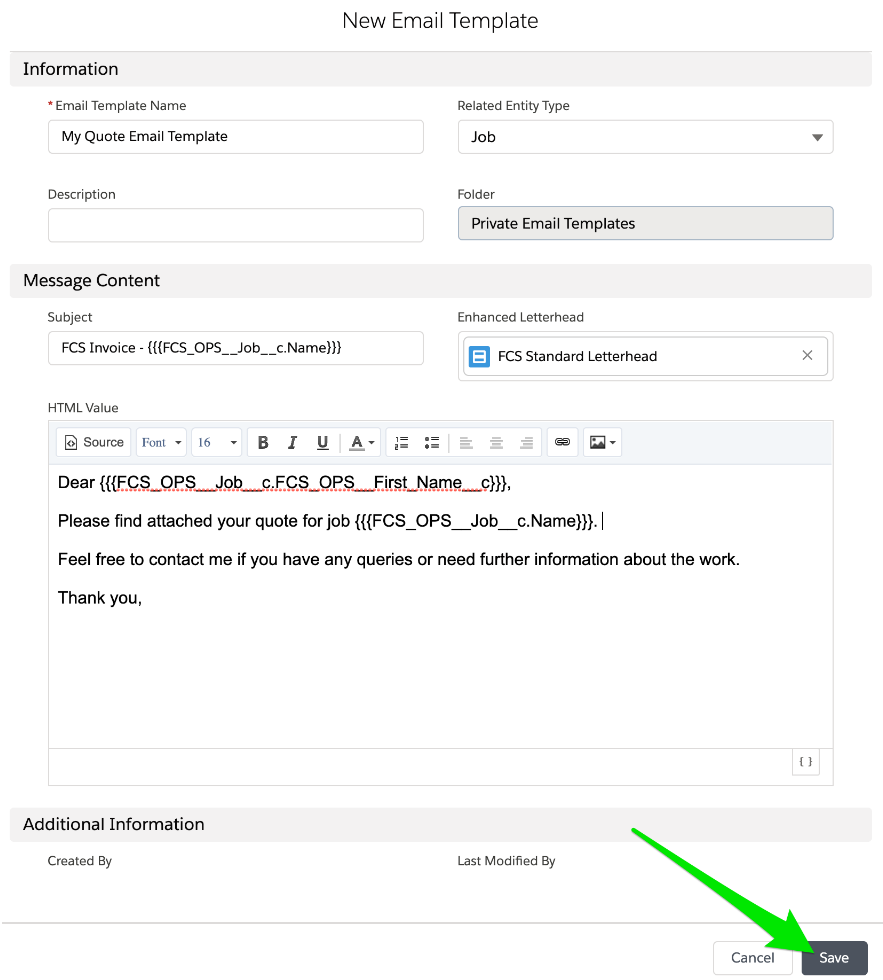
10. Select the Object Reference. Sometimes you might reference yourself (Sender) or your organization (Organization).



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 256.
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 256.
2. Ensure you base the `Entity Type` on *`Invoice`*.

Working with emails and syncing

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

Understanding email sending, responses and syncing

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

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

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

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

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

Forwarding a record of sent emails to your email inbox

To ensure your email inbox has a record of all emails you send from Salesforce, you can choose to send emails to your inbox. *See* "How to send all emails to my inbox" on page 271.

Automatic capture of Salesforce-related emails

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

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

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

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

EAC is not suitable for everyone

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

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

Given the above considerations

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

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

Salesforce extensions for Office 365 and GSuite

If you decide that EAC is not suitable for your needs, you may prefer to use the Salesforce extensions for Office 365 and GSuite. The Salesforce extensions allow you to select which emails (and email threads) are stored in Salesforce. You also have control over which records they are stored against.

In addition to pure capture of email, the Salesforce extensions for Office 365 and Chrome also provides access to Salesforce templates within your email inbox, increasing your productivity even when you're not in Salesforce itself.

» "Installing the Salesforce extension for Office 365" on the next page

» "Installing the Chrome Salesforce extension for GSuite" on page 278

» "Logging email using Salesforce extensions" on page 282

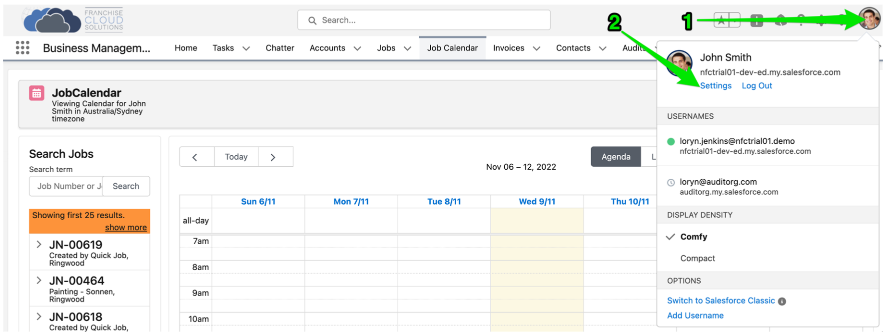
» "Logging events using Salesforce extensions" on page 285

How to send all emails to my inbox

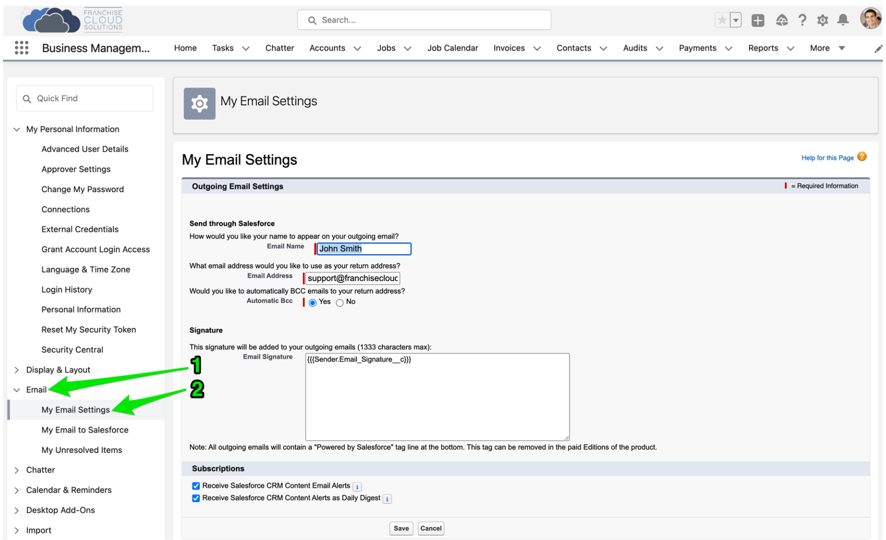
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

To blind copy all emails to your email address

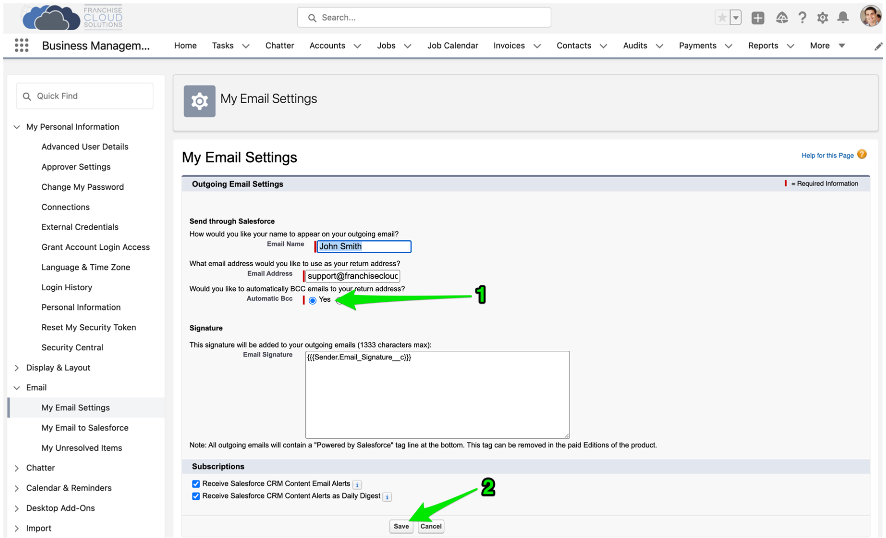
1. Go to **View Profile** and choose **Settings**.



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



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



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

Granting EAC sync permission

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

> Before you agree, you should understand whether your administrator
> - is syncing emails, events, and contacts, or
> - is syncing events and contacts only

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

Installing the Salesforce extension for Office 365

The Salesforce extension for Office 365 provides you control as to

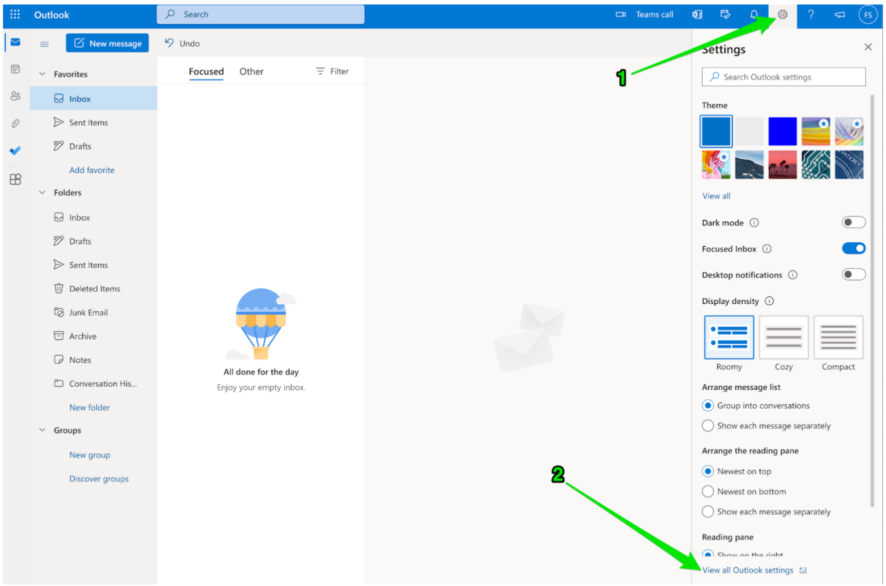
» which Outlook 365 emails or events are logged from your email system into Salesforce

» which Salesforce records the email or event is logged against.

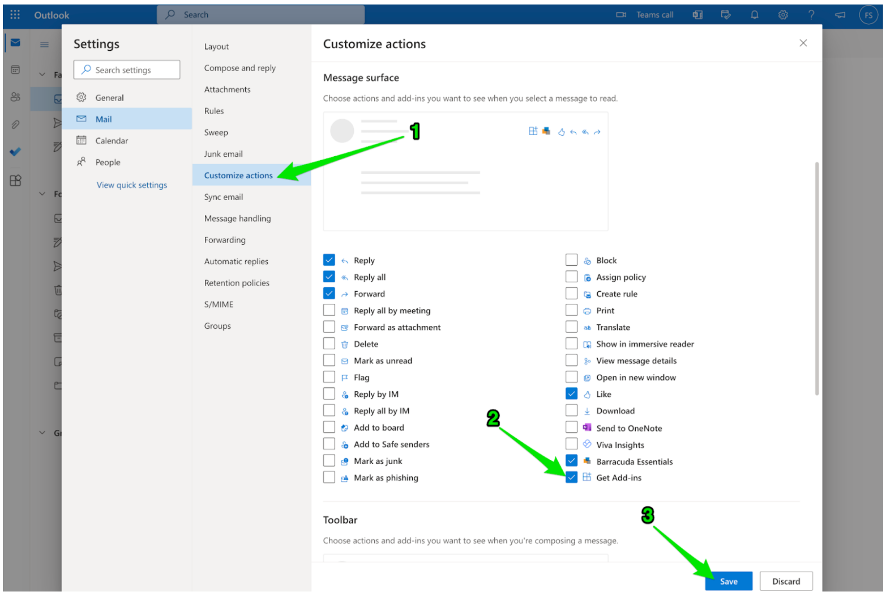
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

To install the Salesforce extension for Office 365

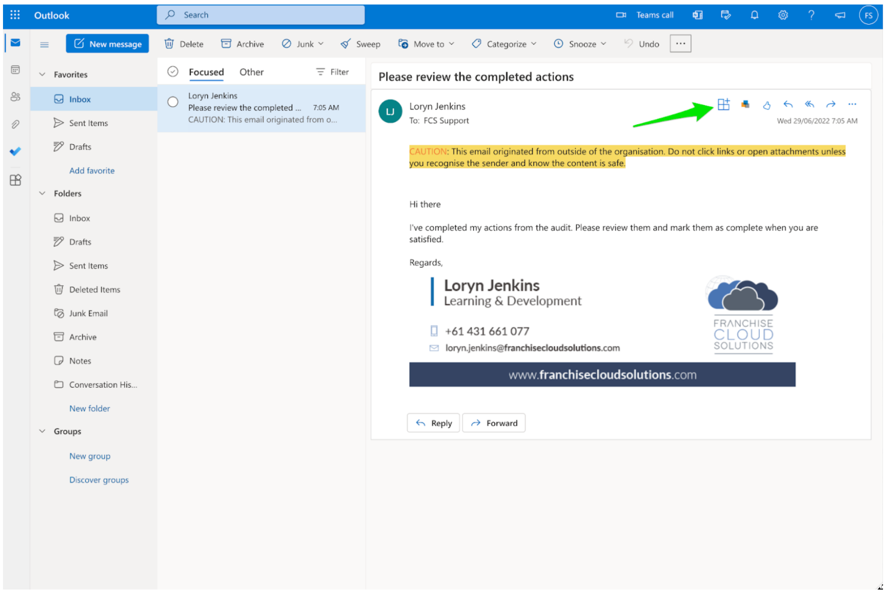
1. From **Outlook 365**, select the **Settings** menu and choose to **View all Outlook Settings**.



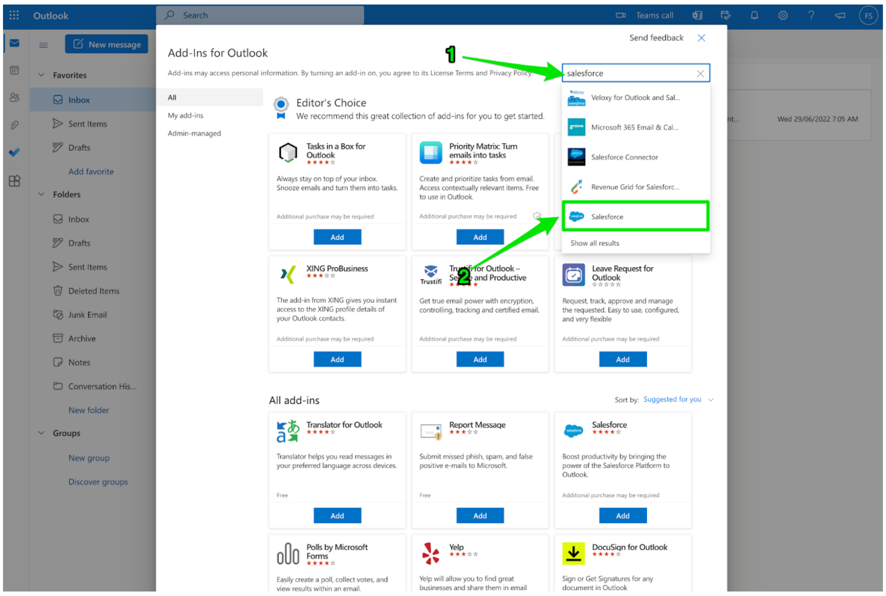
2. Choose **Customize Actions**, scroll to the section named **Message Surface**. Check **Get Add-ins** and press **Save**.



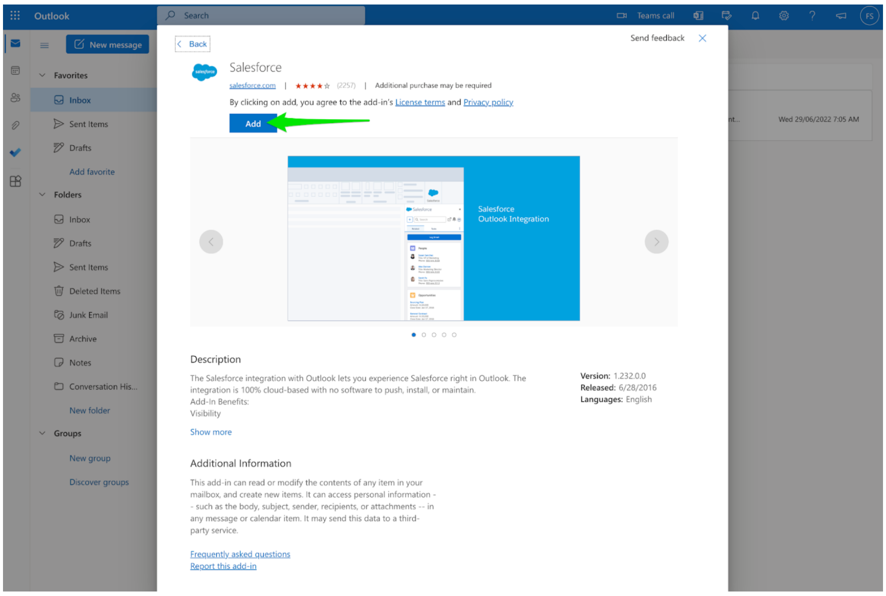
3. Within any message, click the **Get Add-ins** button.



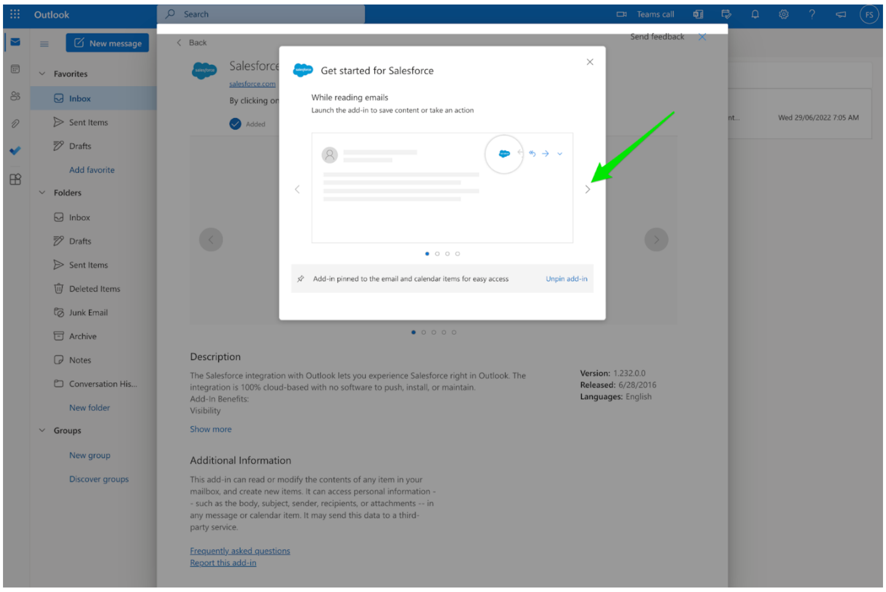
4. Within the Add-ins for Outlook box, search for `Salesforce`. A number of different salesforce add-ins will appear. Select the one shown in the following image or choose **Show all results**.



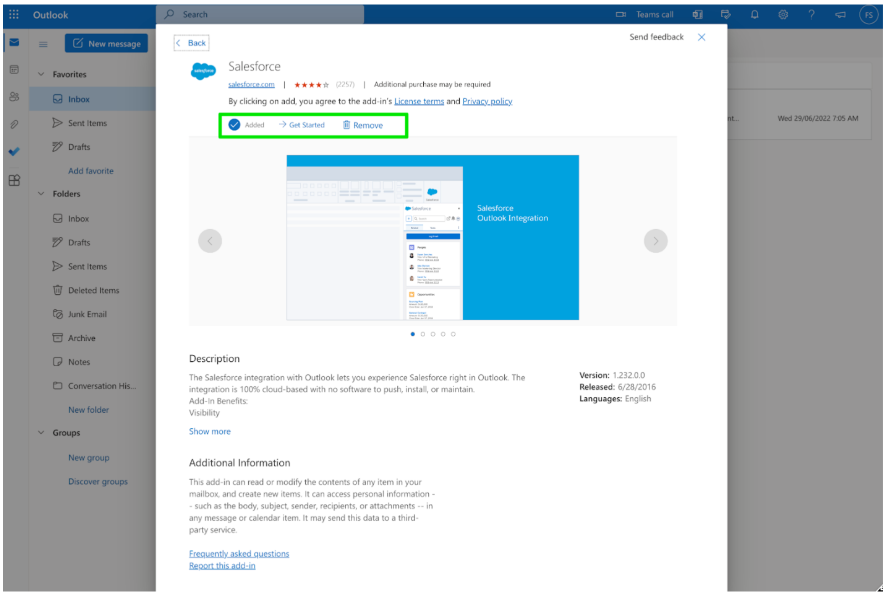
5. From the **Salesforce Connector** page, press the **Add** button.



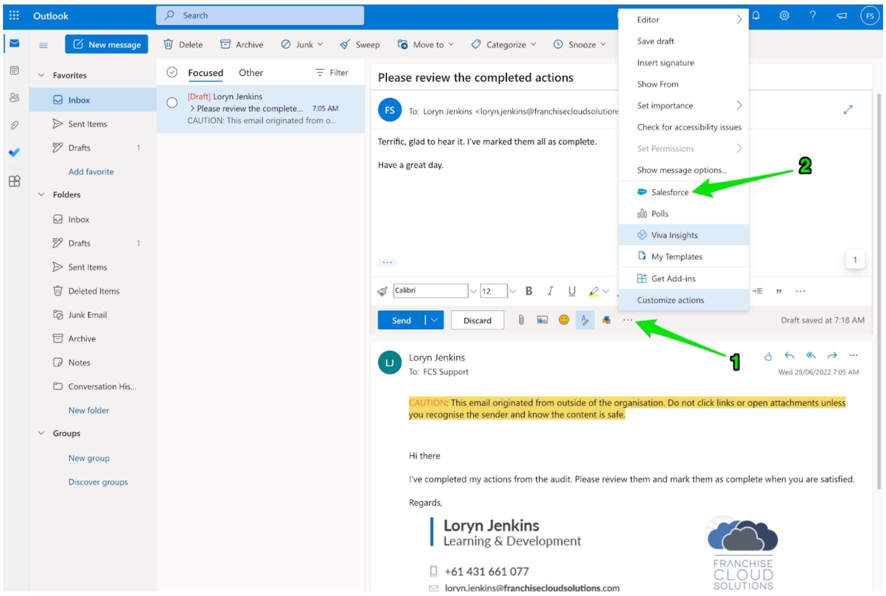
6. We recommend you browse through each of the instructions in the **Get started for Salesforce** box, so you know where to find it and how to use it.



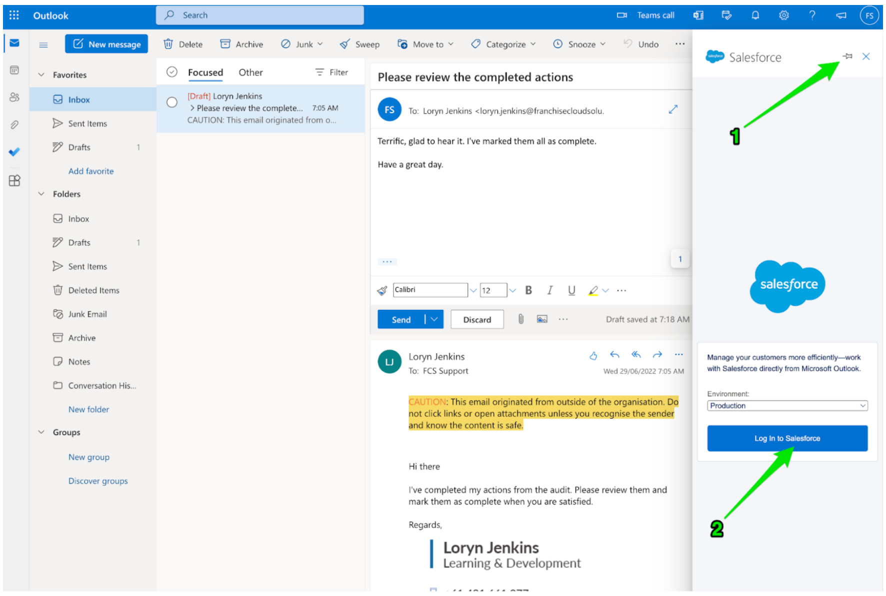
7. Dismiss the **Get started for Salesforce** box and note that the add-in has been added.



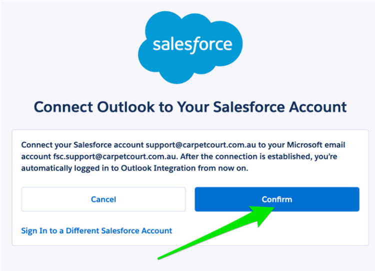
8. Now when you're in any message you're composing, on the **Send** bar, press the **...** button to reveal the menu. Select the **Salesforce** add-in.



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

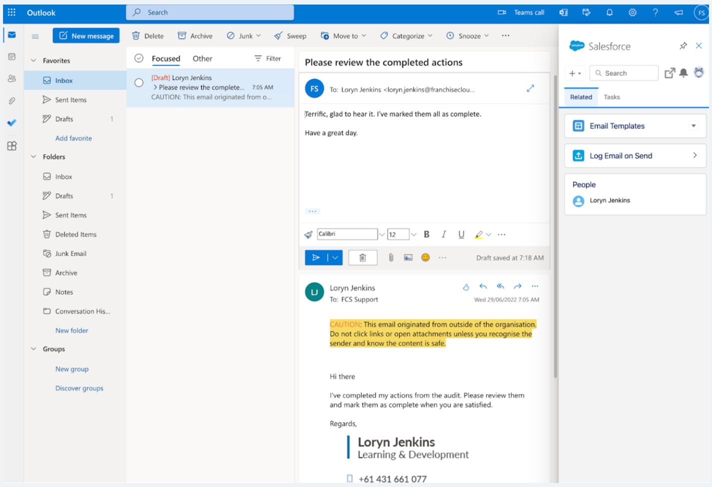


10. At the login prompt, enter your Salesforce **Username** and **Password**. Once logged in, ensure you **Allow** the connection between **Outlook** and your **Salesforce** account.



Congratulations

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



Installing the Chrome Salesforce extension for GSuite

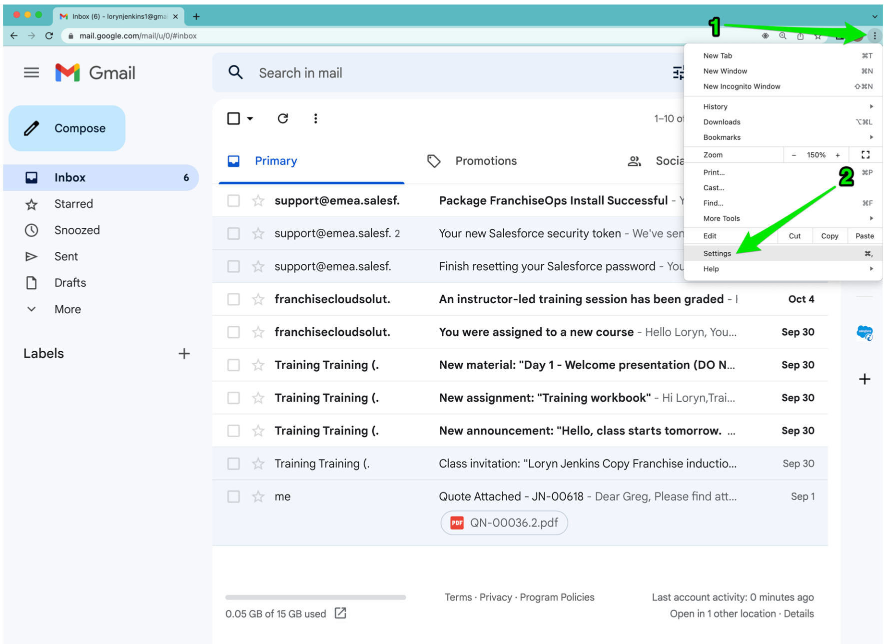
The Salesforce extension for Chrome provides you control as to

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

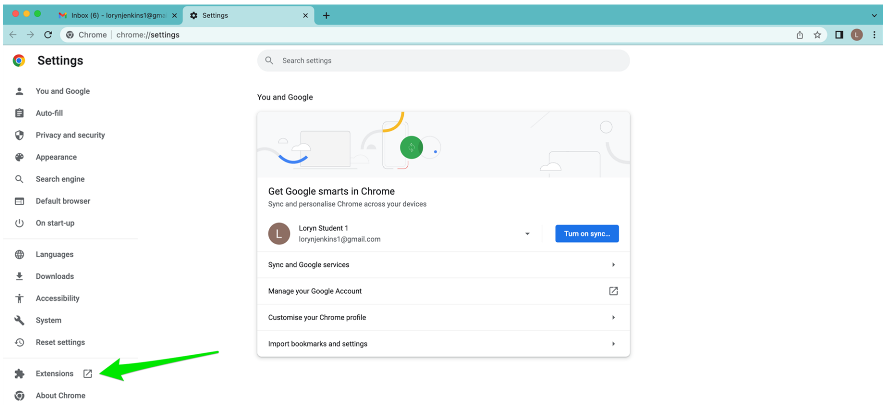
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

To install the Salesforce extension for GSuite

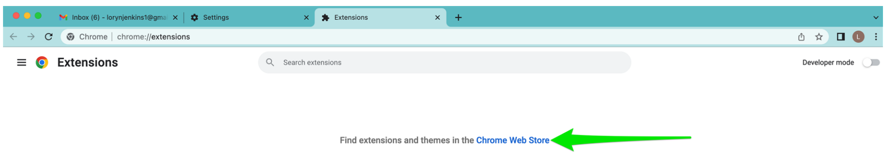
1. Using the **Chrome** browser, open **GMail**. Select the **Customize** ⋮ menu, and choose **Settings**.



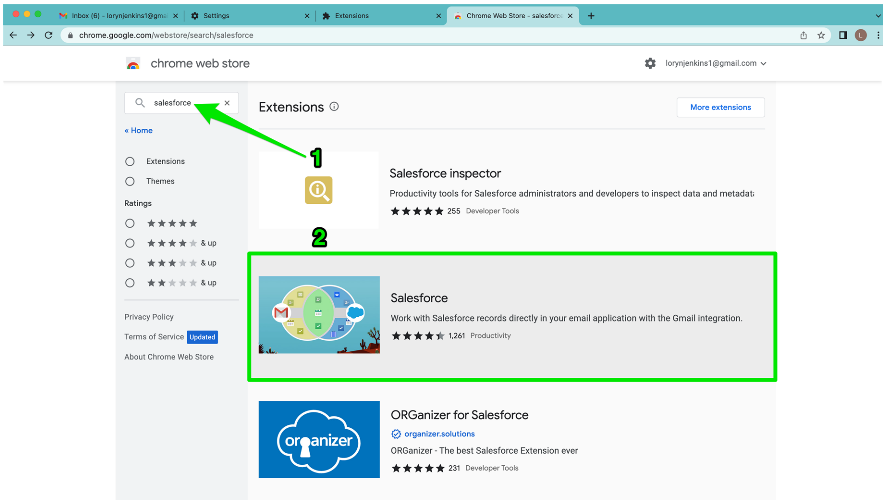
2. Chrome opens a tab in which it displays the **Settings** menu. Select the **Extensions** link.



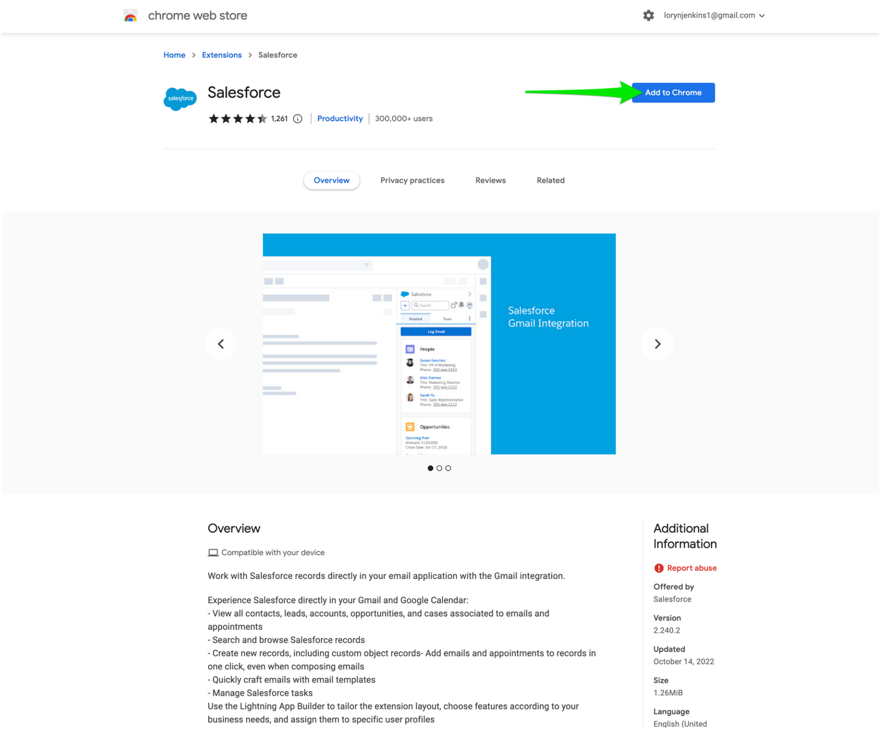
3. **Extensions** opens in yet another tab. Select the link to the **Chrome Web Store**.



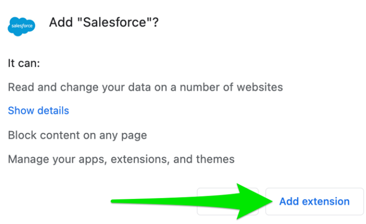
4. A fourth tab opens and displays the **Chrome Web Store**. In the search box, search for `Salesforce`. Select the **Salesforce** extension.



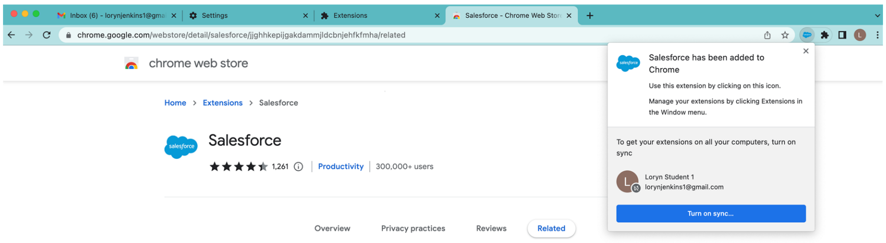
5. From the **Salesforce** entry, select the **Add to Chrome** button.



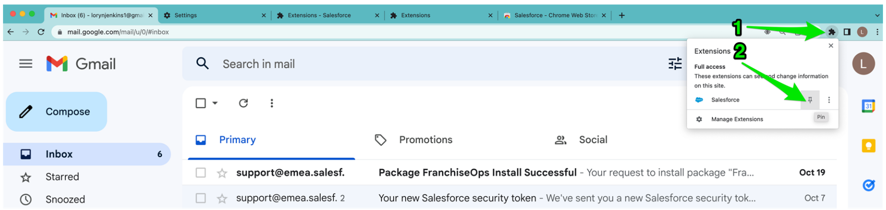
6. From the **Add "Salesforce"** box, select **Add Extension**.



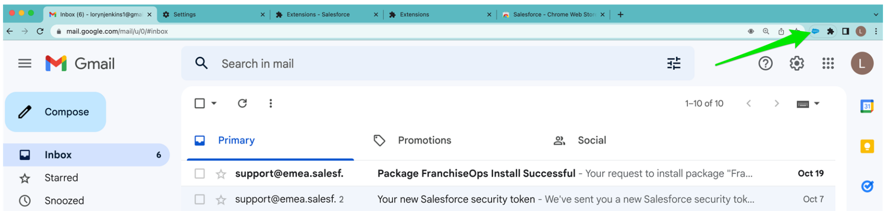
7. Salesforce adds the extension to Chrome then provides a popup to confirm that the extension has been added.



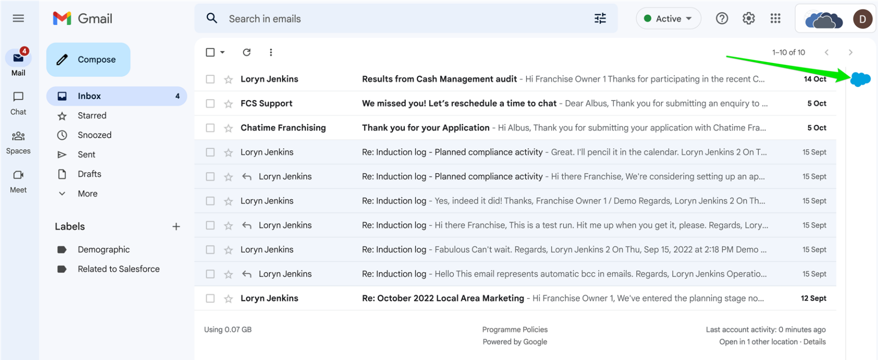
8. Now go back to the tab containing **GMail** and click on the Extensions button, then click the **Pin** button beside the Salesforce label.



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

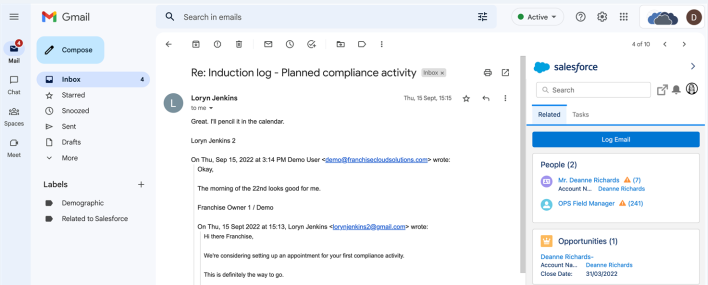


10. The Salesforce extension for Chrome now appears in the sidebar of your web browser. Click on the Salesforce cloud icon to expand the sidebar.



Congratulations

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



Logging email using Salesforce extensions

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

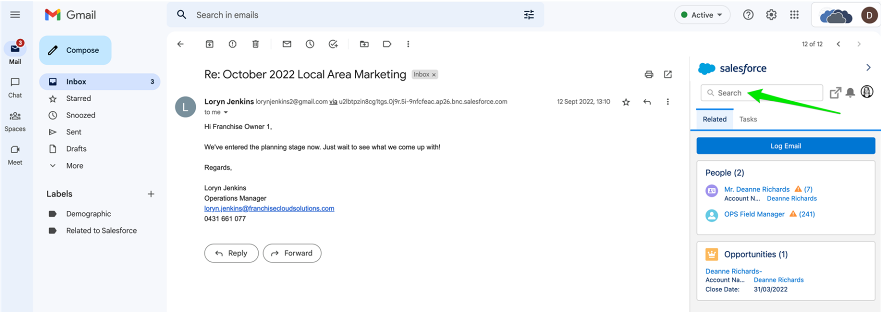
Do not log confidential email onto the Franchise Profile Account record

In Operations Management, you should not log email concerning a franchisee into their Franchise Profile Account. If you do this, the franchisee will be able to see the email. You should log confidential email concerning a franchisee into a Management Log record.

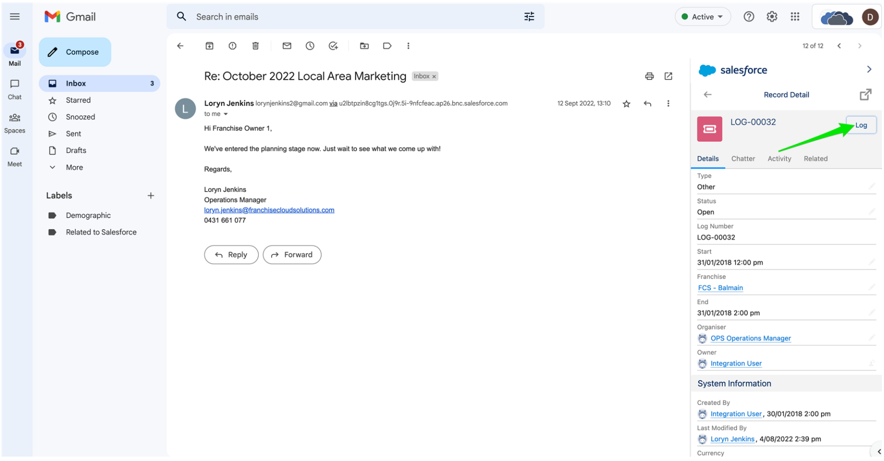
All screen shots below show the Chrome extension. The extension for Office 365 is used similarly.

To log an email against a management log (and other related records)

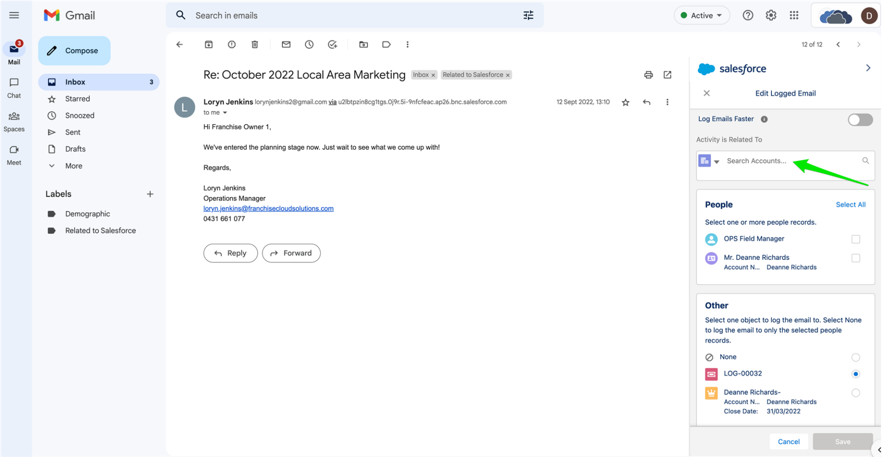
1. With your email open and the Salesforce pane opened, search for the **Management Log** record in the search field.



2. The system will display the **Management Log** record. When you're satisfied it is the right record, press **Log**.

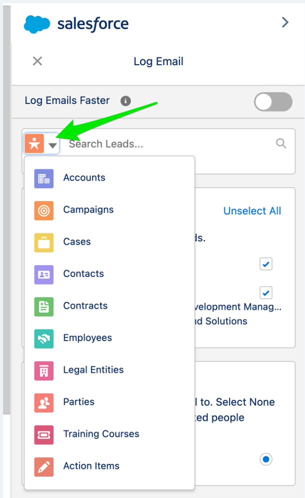


3. If you need to add more people to the list, you can search to find other people or other records. Enter your search term in the search box, and choose from the records appearing in the drop-down list.

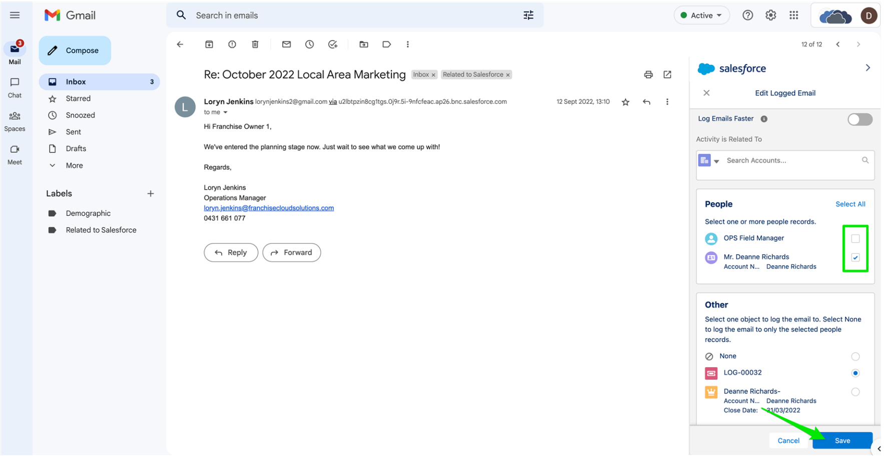


Hint

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

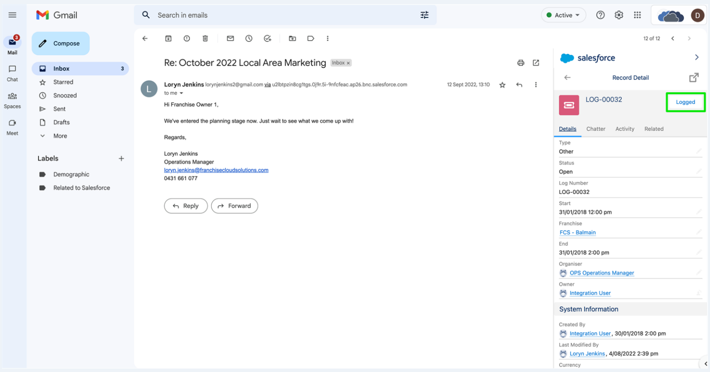


4. Once you have the right records in the list, check or uncheck the boxes to achieve the right checked items, then press **Submit**.



Congratulations

The record is now logged against the selected Salesforce records. You can find the email in the records' Activity History.



Logging events using Salesforce extensions

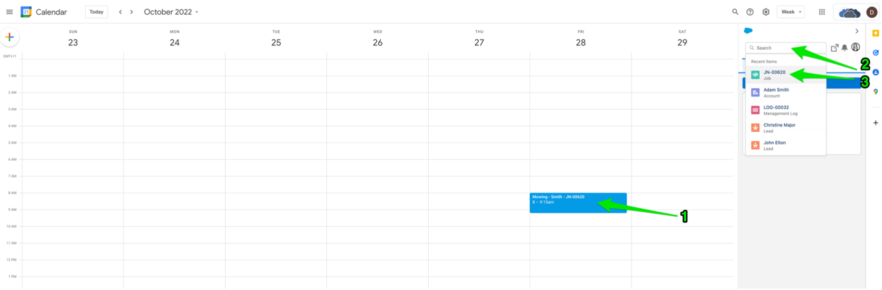
If automatic event syncing is not configured from your personal calendar back to the Salesforce calendar (check with your system administrator) you may still be able to manually log events using the Salesforce extension.

Do not log confidential events onto the Franchise Profile Account record

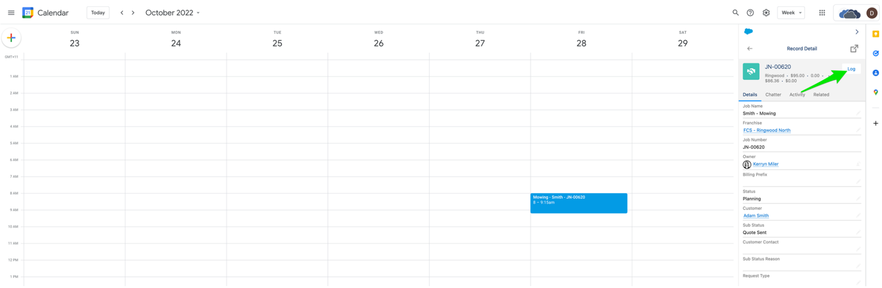
In Operations Management, you should not log email concerning a franchisee into their Franchise Profile Account. If you do this, the franchisee will be able to see the email. You should log confidential email concerning a franchisee into a Management Log record.

To log an event to a Salesforce record

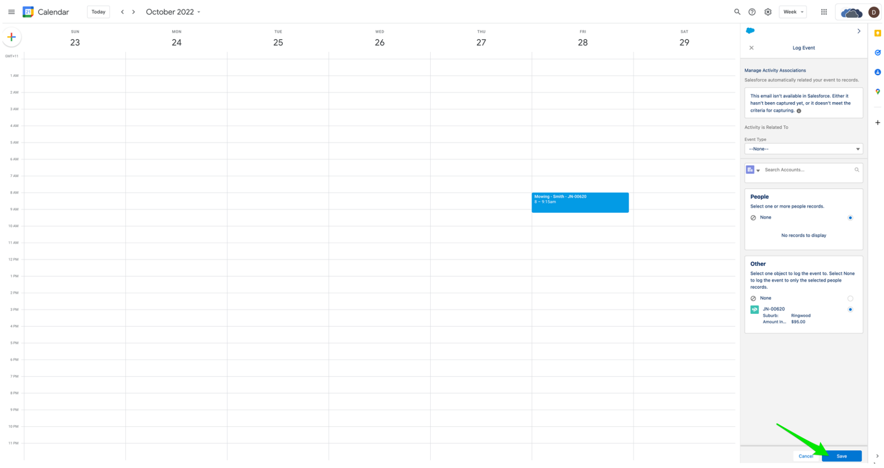
1. In your personal calendar select the event, then search for the appropriate record within the Salesforce search pane.



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

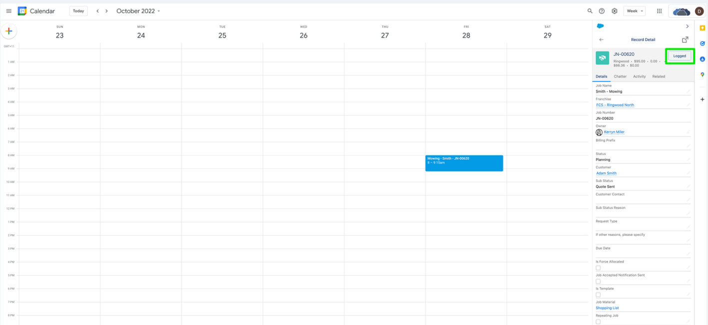


3. Now press **Save**.



Congratulations

The event is logged to Salesforce.



CHAPTER 12

Working with Customer Feedback

Understanding customer feedback

Operations Management supports gathering customer feedback. There are two types of customer feedback supported by Operations Management

- feedback from job satisfaction surveys
- unsolicited complaints or compliments about the service.

The franchisor may choose to run the job satisfaction customer feedback program by randomly sampling a portion of customers whose jobs have recently completed.

> Customer feedback programs are a really useful way of receiving feedback that you may not be able to get any other way. Customers often don’t tell you directly what they think face to face. They are often more willing to reveal their true service experience when they complete a survey.

It is in your best interest for as many customers as possible to be included in the customer satisfaction program.

Unsolicited feedback can be received from the online customer feedback web form or by directly contacting the franchisor’s call center. All types of feedback provide useful information for growing and improving the business.

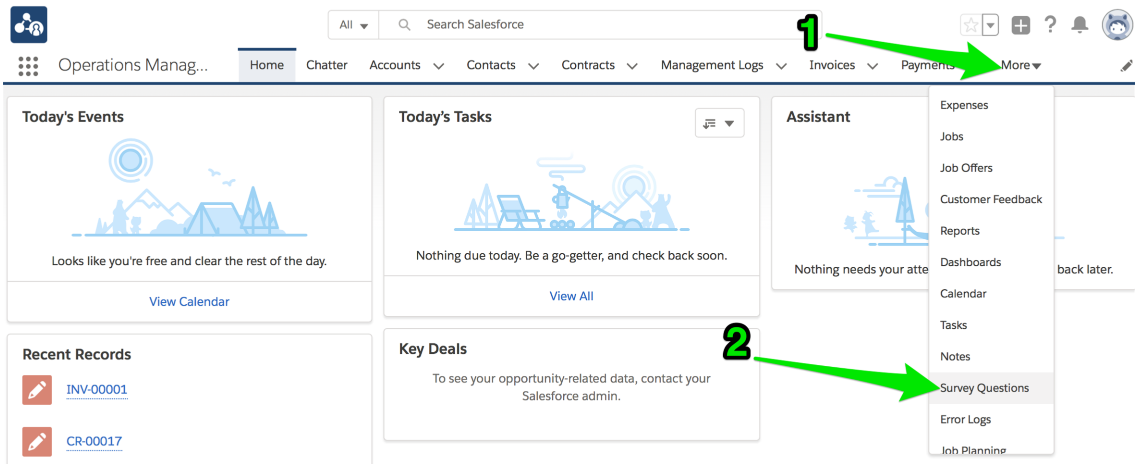
Job satisfaction

How to view job satisfaction survey questions

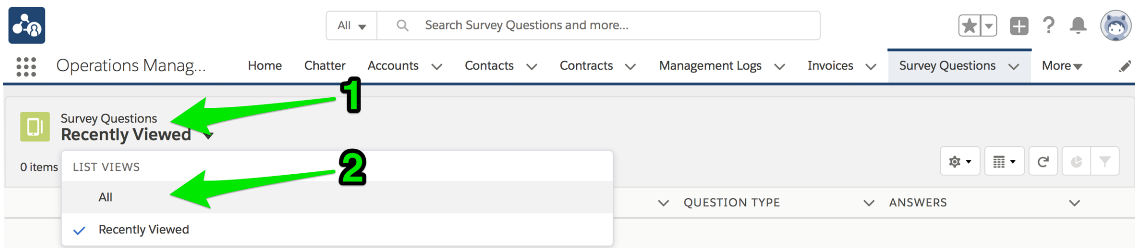
Job satisfaction surveys can be sent to a proportion of customers who have recently had a completed job. You can view the questions asked in this survey by viewing the job satisfaction survey questions.

To view job satisfaction survey questions

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

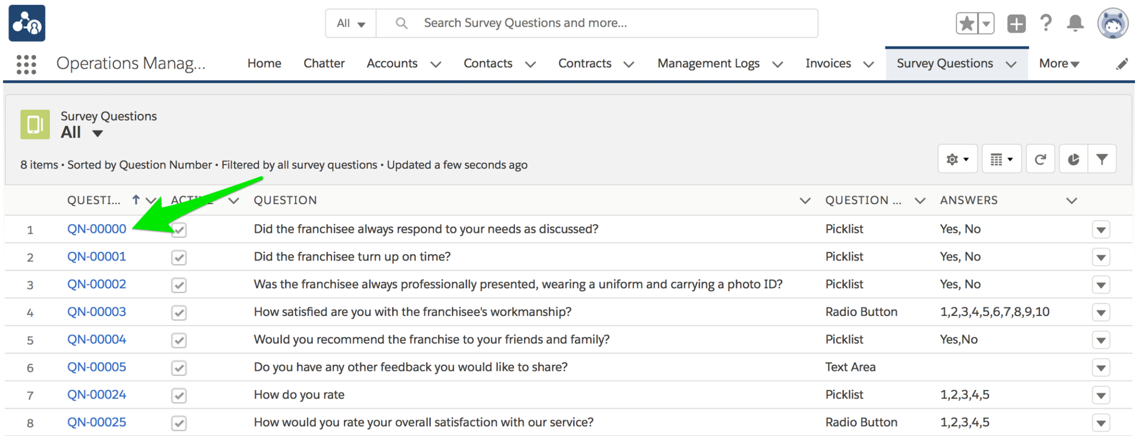


2. Switch to the **All** list view.

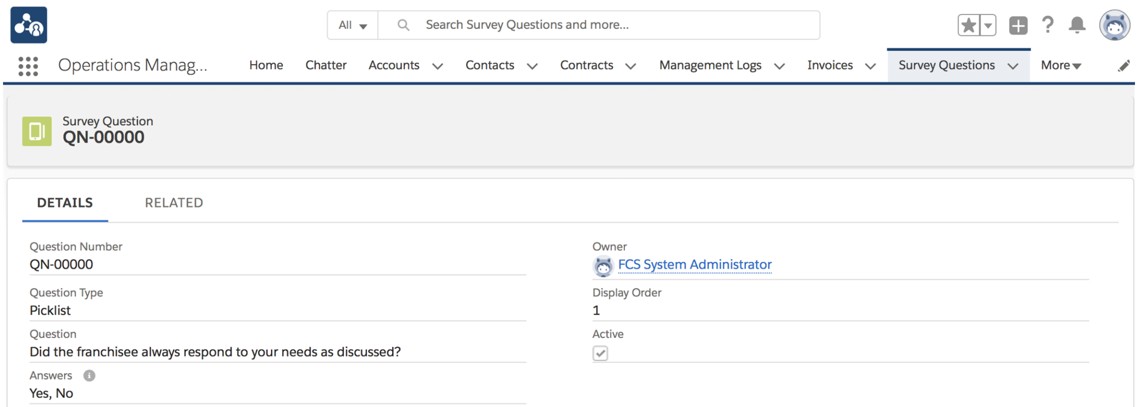


The list of all survey questions appears.

3. Select one of the survey questions to view its details.



The detail for the survey question is displayed.



Survey questions can consist of the following question types:

Text Area - allow the customer to enter free-form text
Picklist - select one answer from a drop-down list
Radio button - select one answer from a list of choices
Multi-select - select one or more answers from a list of choices

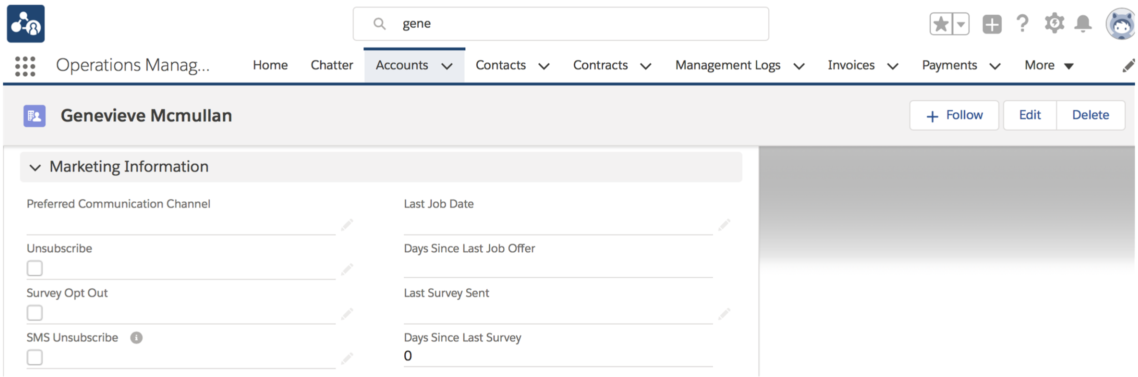
How to remove someone from job satisfaction surveys

It best that as many customers as possible are included in the customer feedback program. But when a customer requests removal from the program, it is best to remove them.

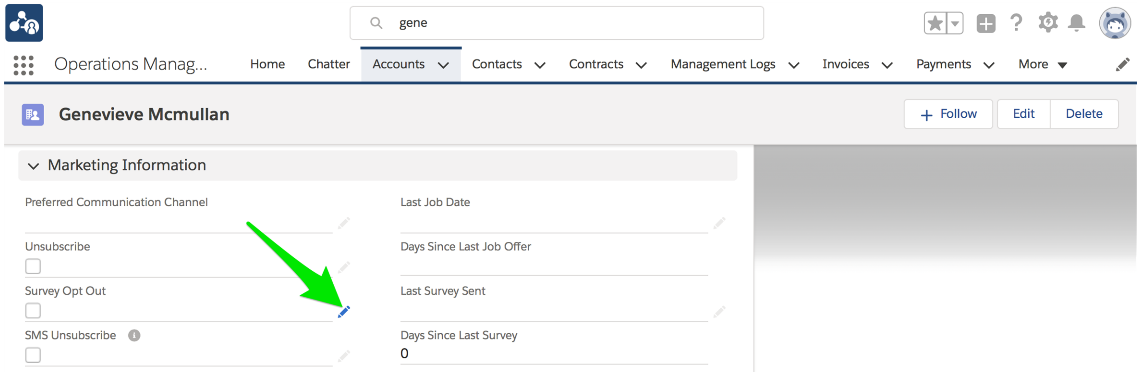
By default **Business Accounts** and **Contacts** are excluded from customer feedback programs.

To prevent an existing customer from being included in a customer feedback survey

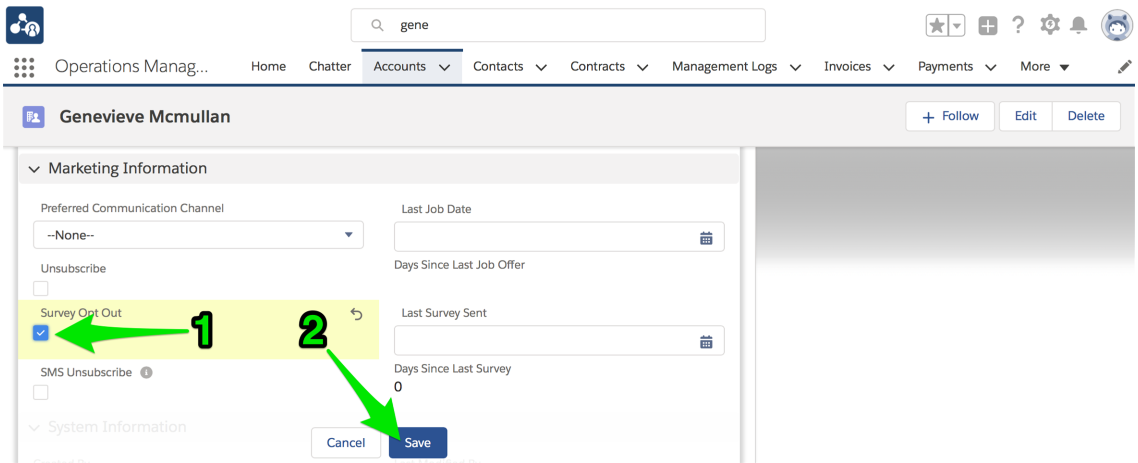
1. Find and open the customer's **Account**.
2. Scroll down to the **Marketing Information** section.



3. Place the **Account** in **Edit** mode.



4. Check `Survey Opt Out`, then press **Save**.



The customer will now be excluded from the customer feedback program.

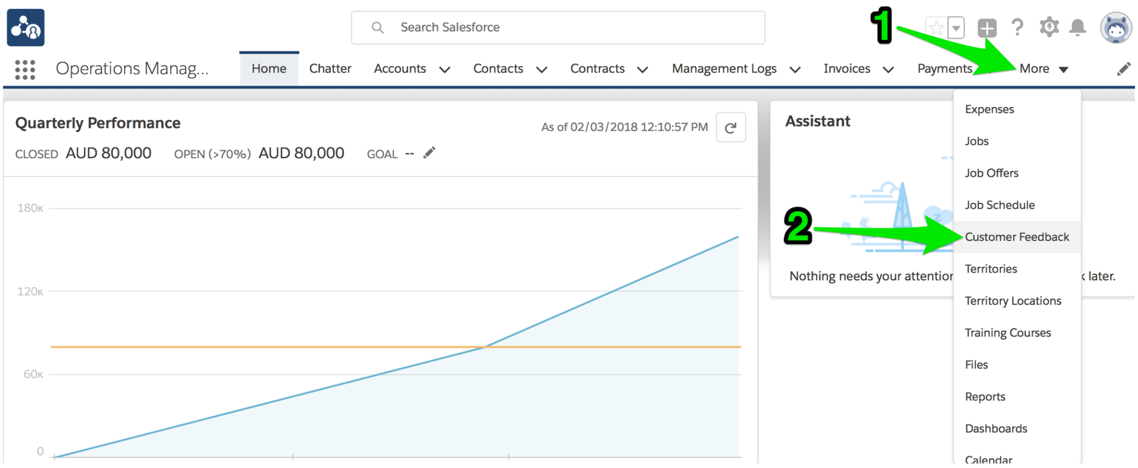
Customer feedback

How to view customer complaints and compliments

You can view customer feedback responses.

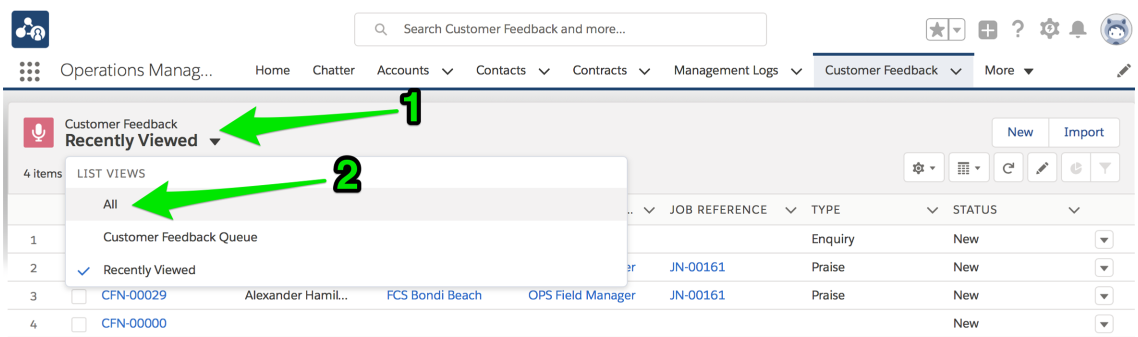
To view customer feedback responses

1. From the Salesforce menu, select **Customer Feedback**.

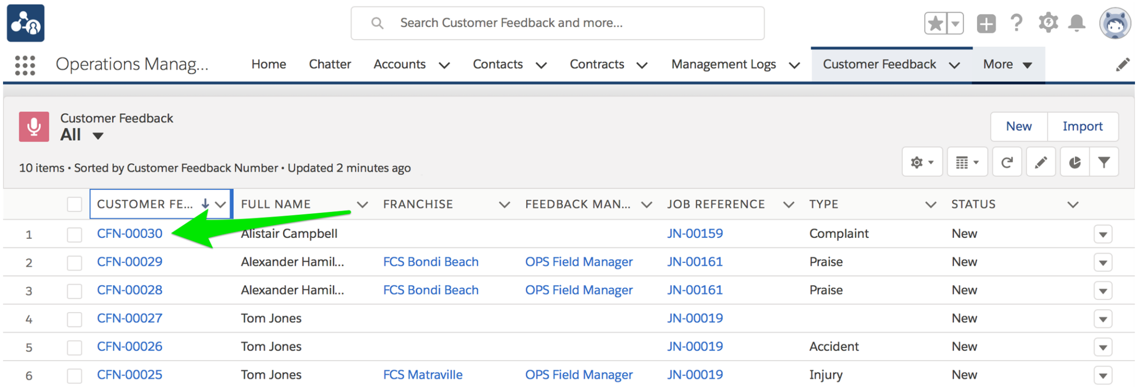


   The **Customer Feedback** list displays.

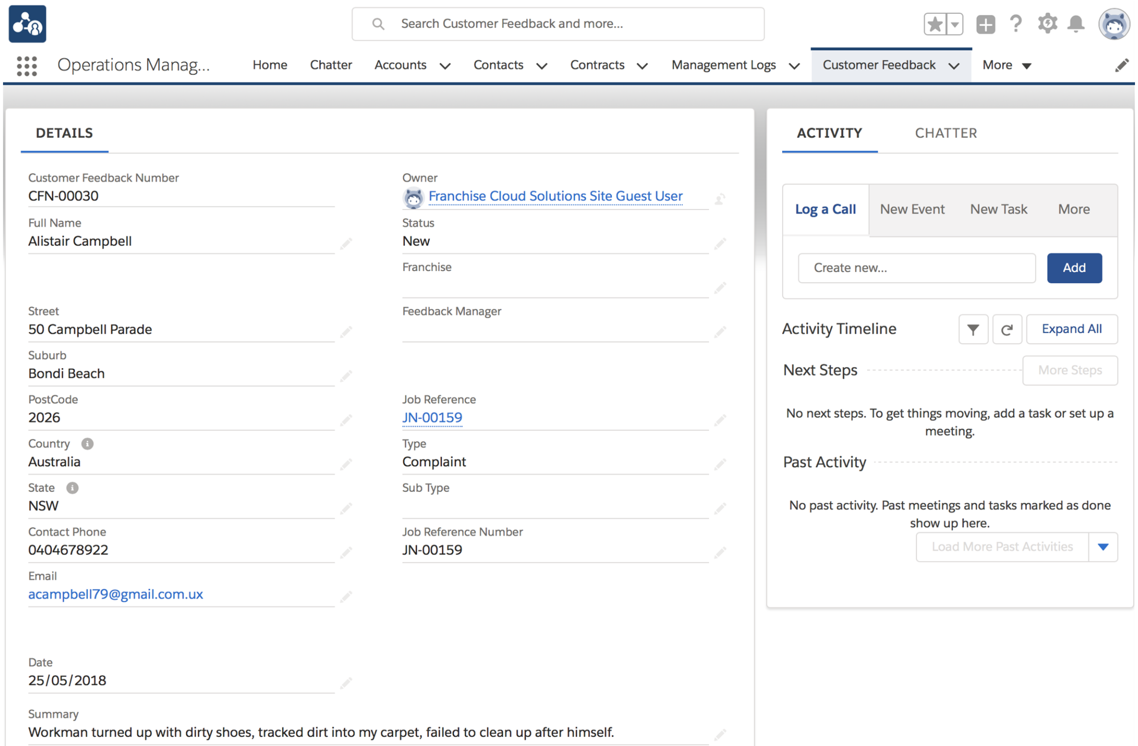
2. Select the **All** list view, or create your own customer list view.



3. Select any of the customer feedback records.



4. Now you can view, evaluate and process the customer feedback.

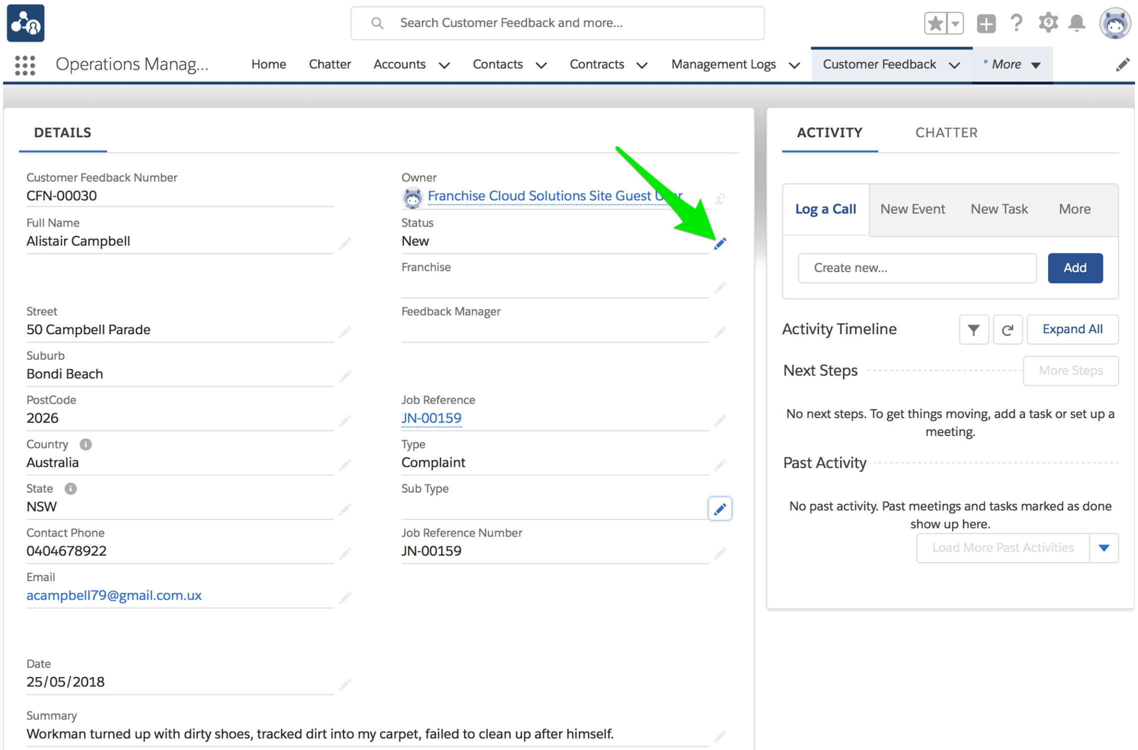


How to process new customer complaints and compliments

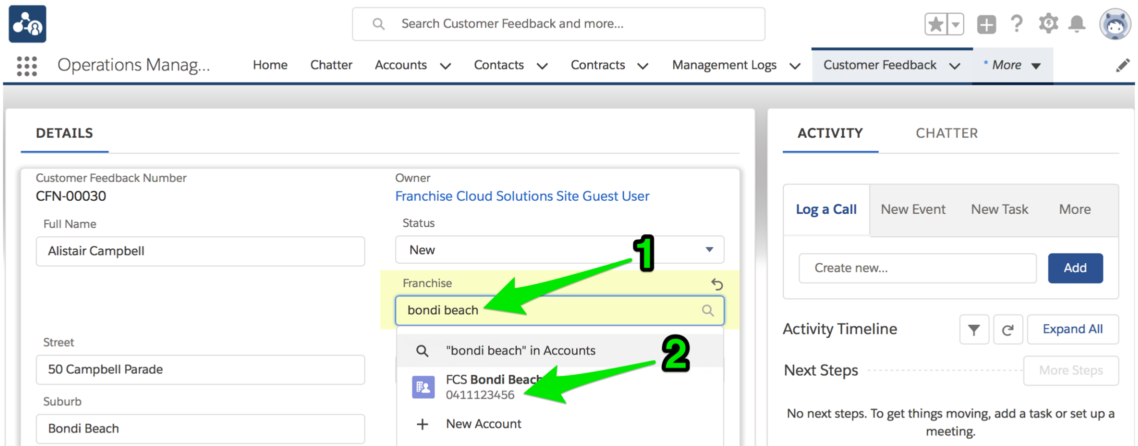
When a complaint or compliment is received, it needs to be processed for action.

To process a complaint or compliment

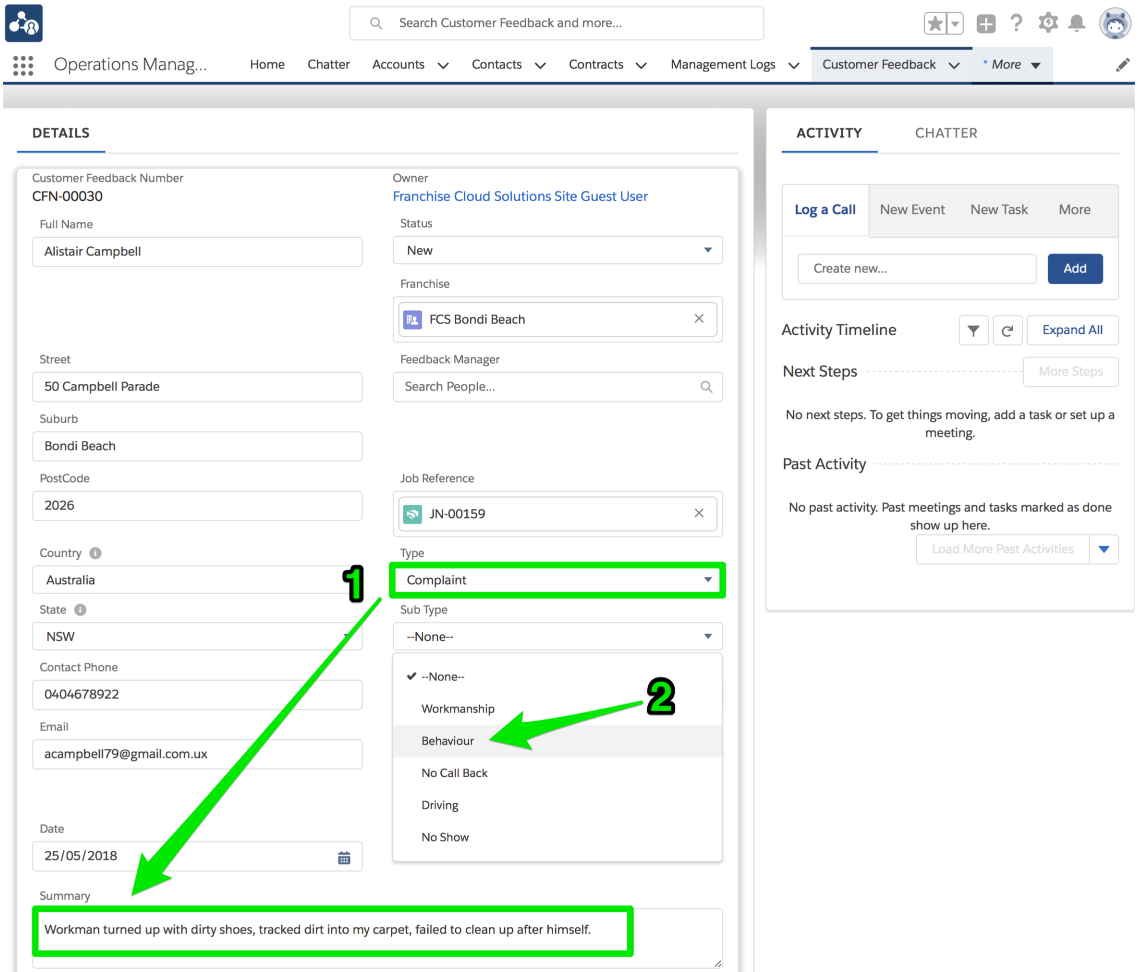
1. From the **Customer Feedback** record, place the record in **Edit** mode.



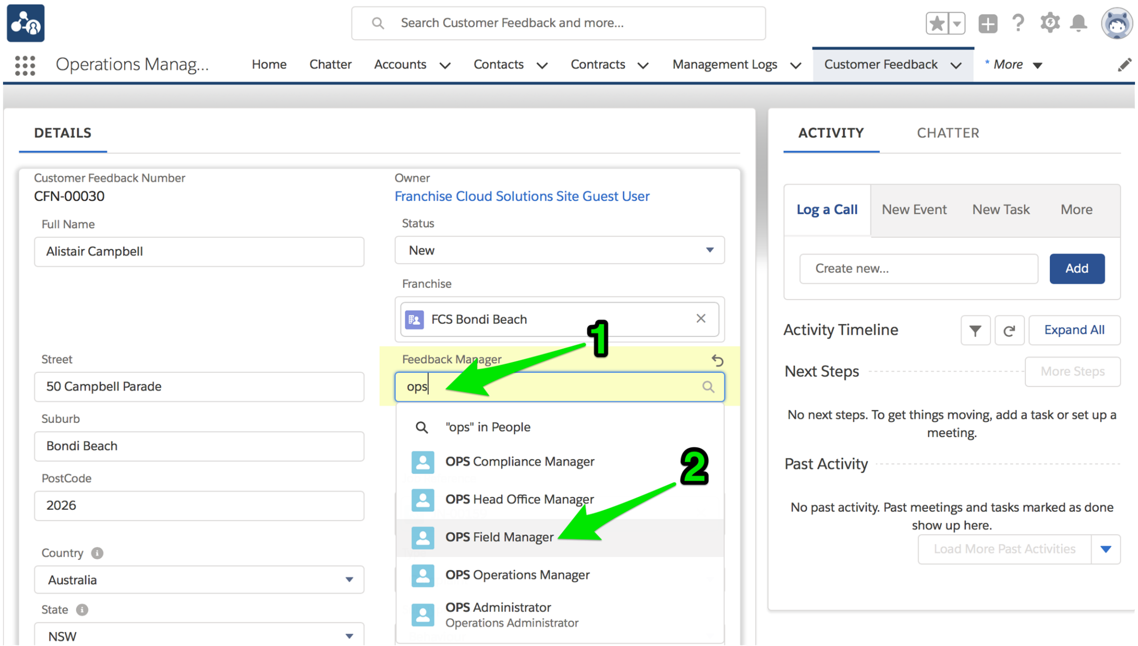
2. Identify the `Franchise` to whom this feedback belongs.



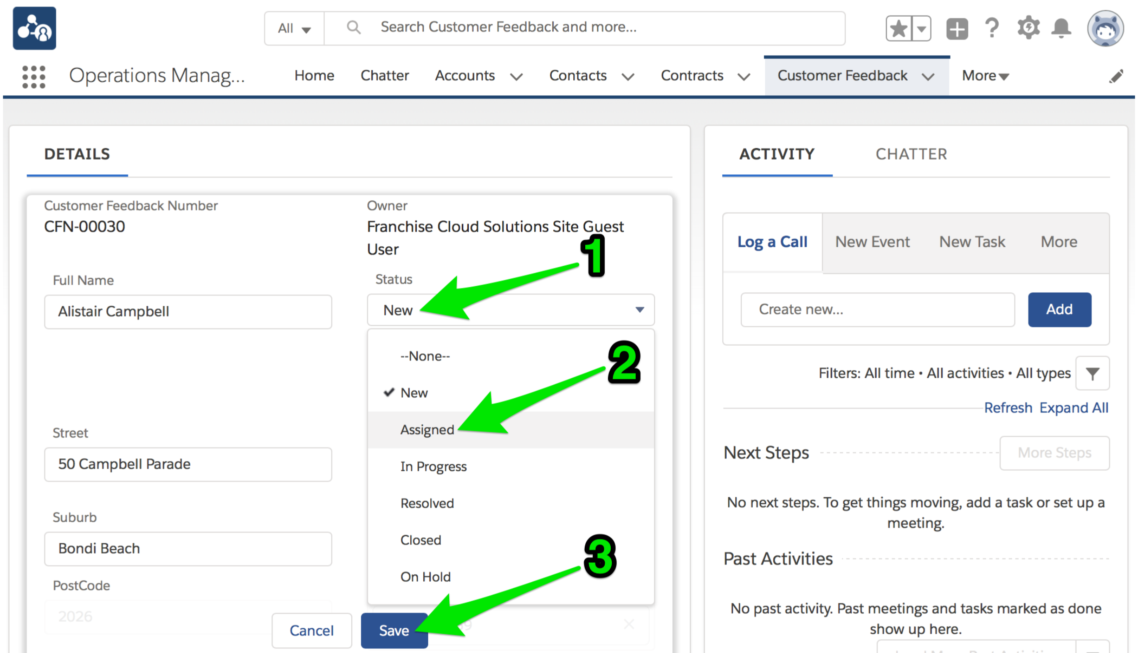
3. Identify what type of feedback this is. Check the `Type` against the `Summary`. Assess which `Sub Type` this is and set the `Sub Type`.



4. Set the manager responsible for taking action on the feedback in `Feedback Manager`.



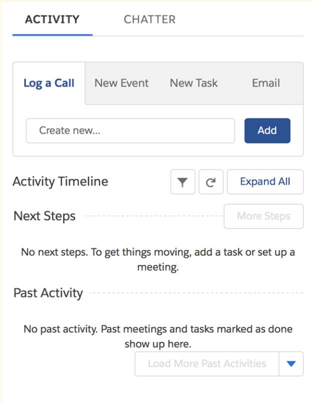
5. Now update the `Status` to *`Assigned`*.



How to resolve customer complaints and compliments

It is good practice to promptly resolve customer feedback records.

Activity features are ideal for supporting this process.



Once customer feedback has been assigned to a `Feedback Manager`, inaction within a certain period of time will result in an escalation email being sent to the manager of the responsible person. Resolving the feedback item within the escalation period will prevent escalation notifications.

To resolve a customer feedback record

1. Work with the customer to resolve the issue to their satisfaction.
2. Set the `Status` to *`Resolved`* or *`Closed`*.

CHAPTER 12

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].

CHAPTER 13

Working with Activity Lists

Understanding activity lists

Implementing a repeatable process is essential to achieving high productivity. Activity lists are a big help in implementing this repeatable process.

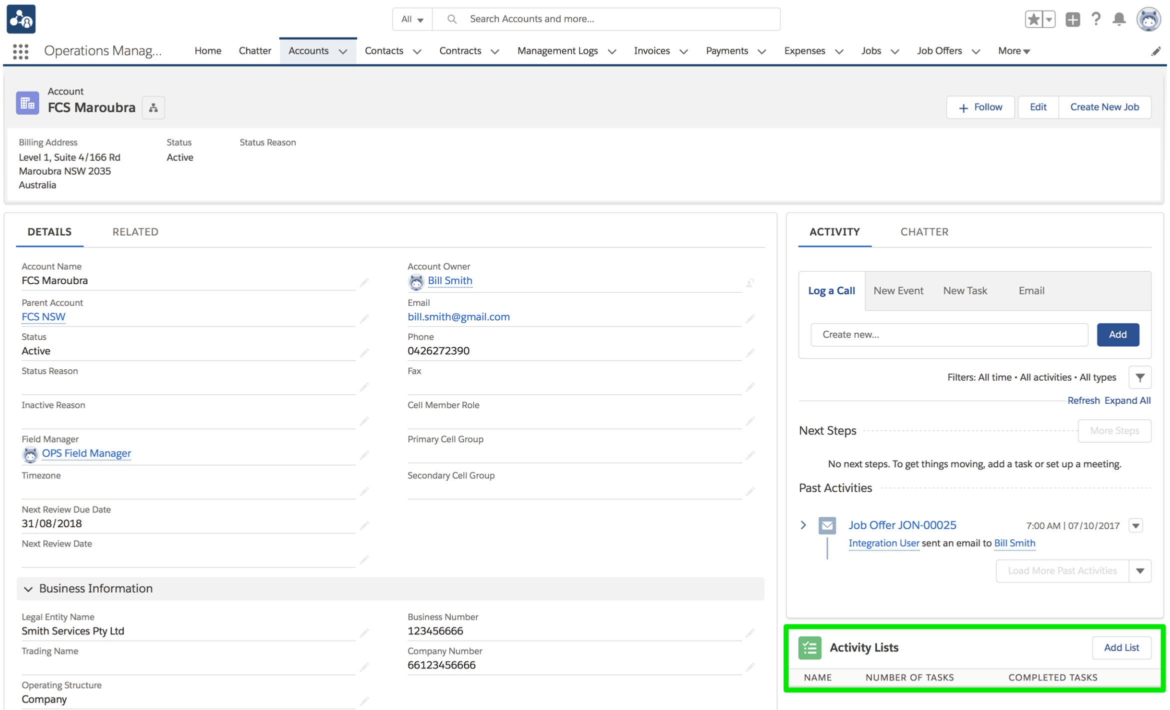
At its heart, an activity list contains a list of tasks. The tasks can be automatically assigned to individuals to be completed within a certain time-frame.

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

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

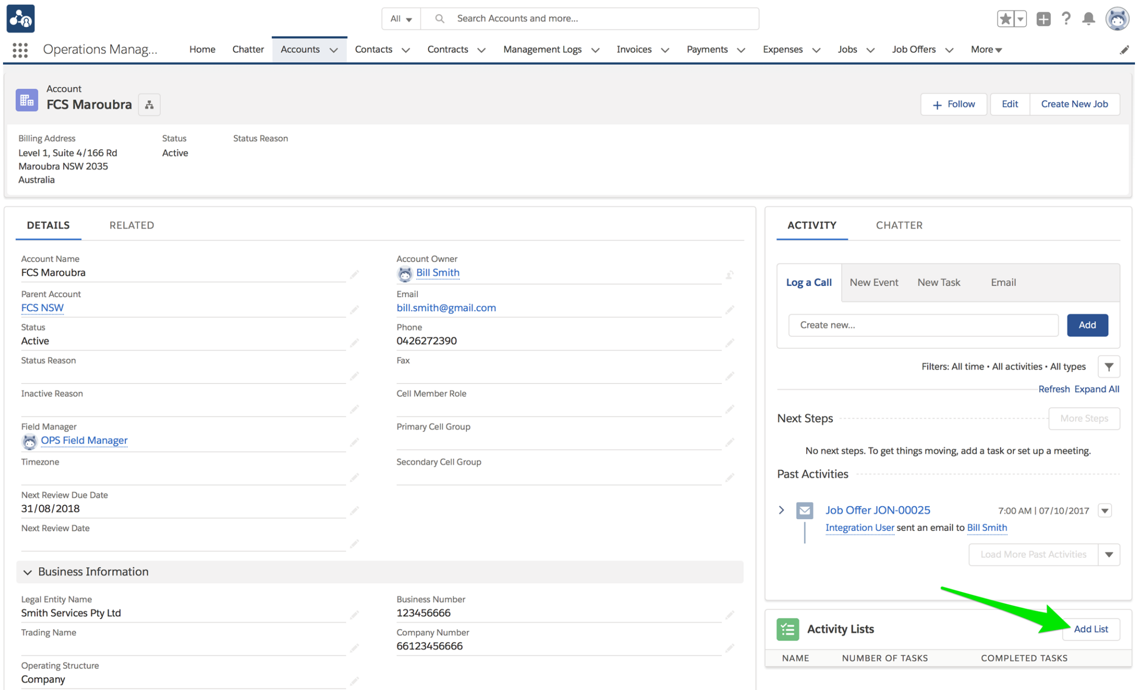
Applying an activity list

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



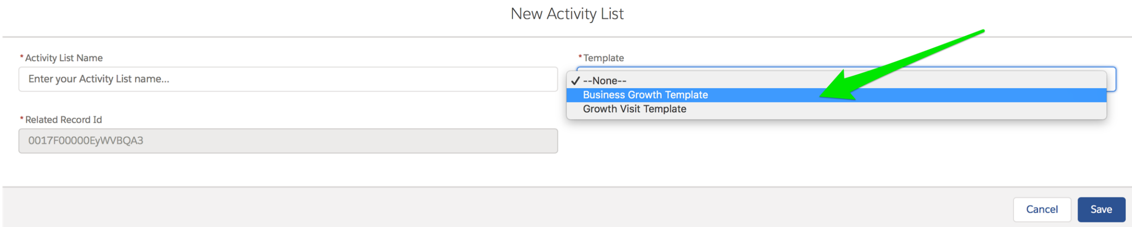
To apply an activity list:

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

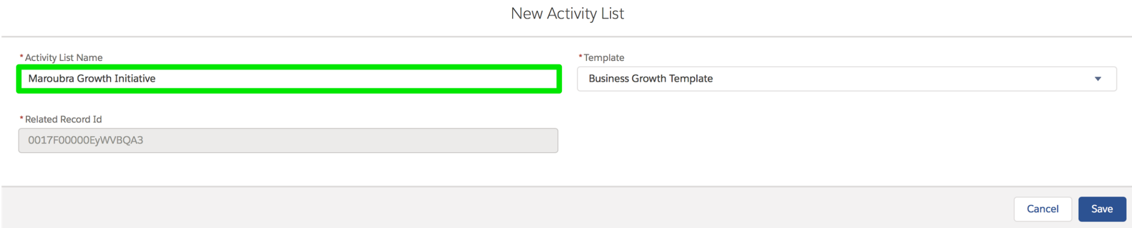


The **New Activity List** dialog box appears.

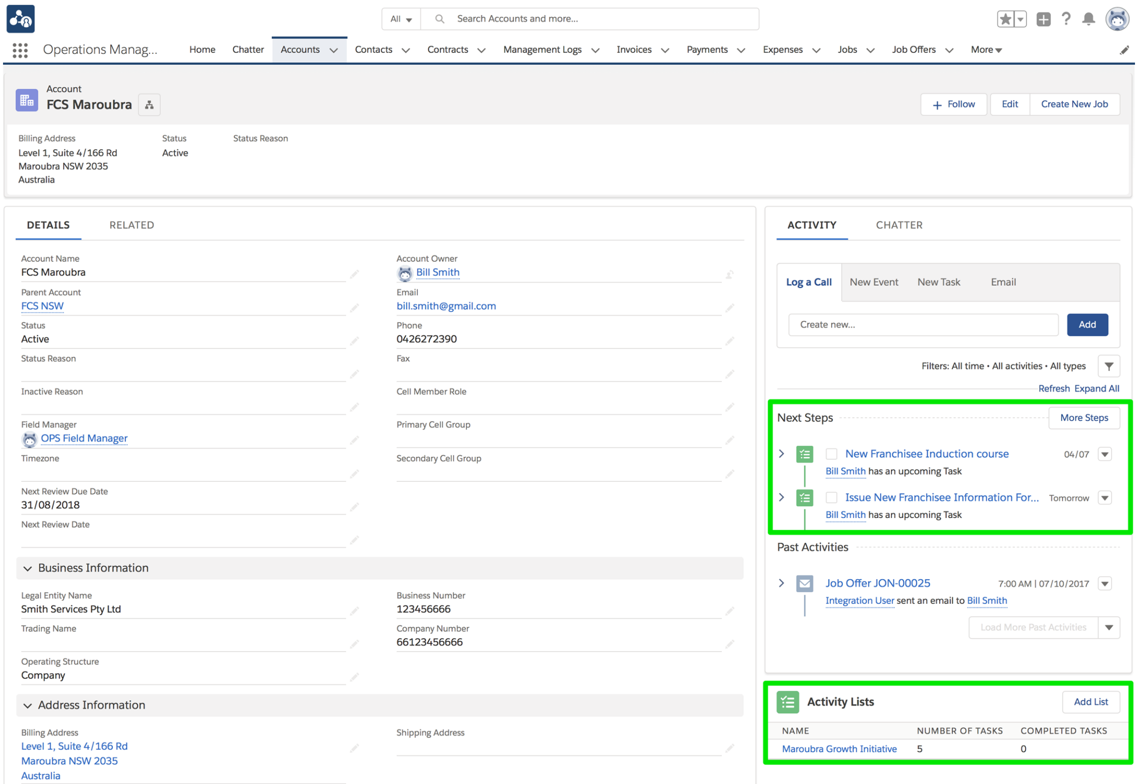
2. Select an available `Template`.



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



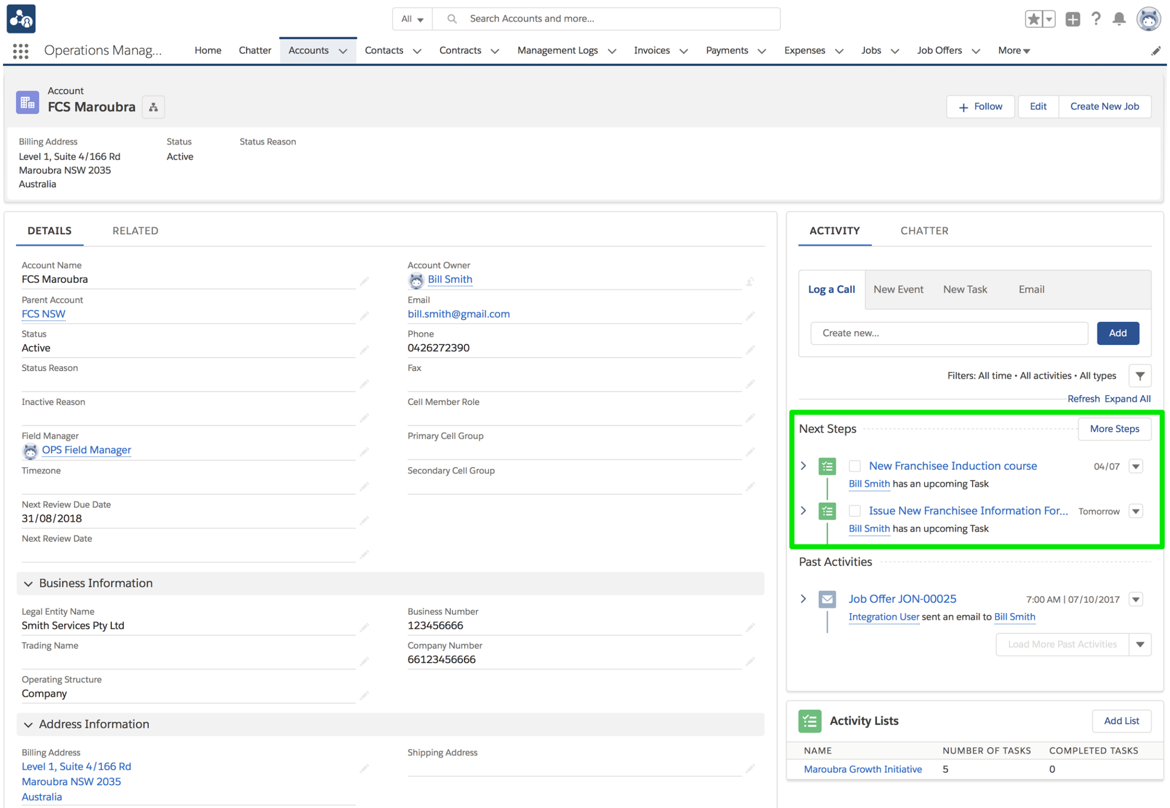
The **Activity List** is attached to the record and at least some of the tasks from the list appear within **Next Steps**.



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

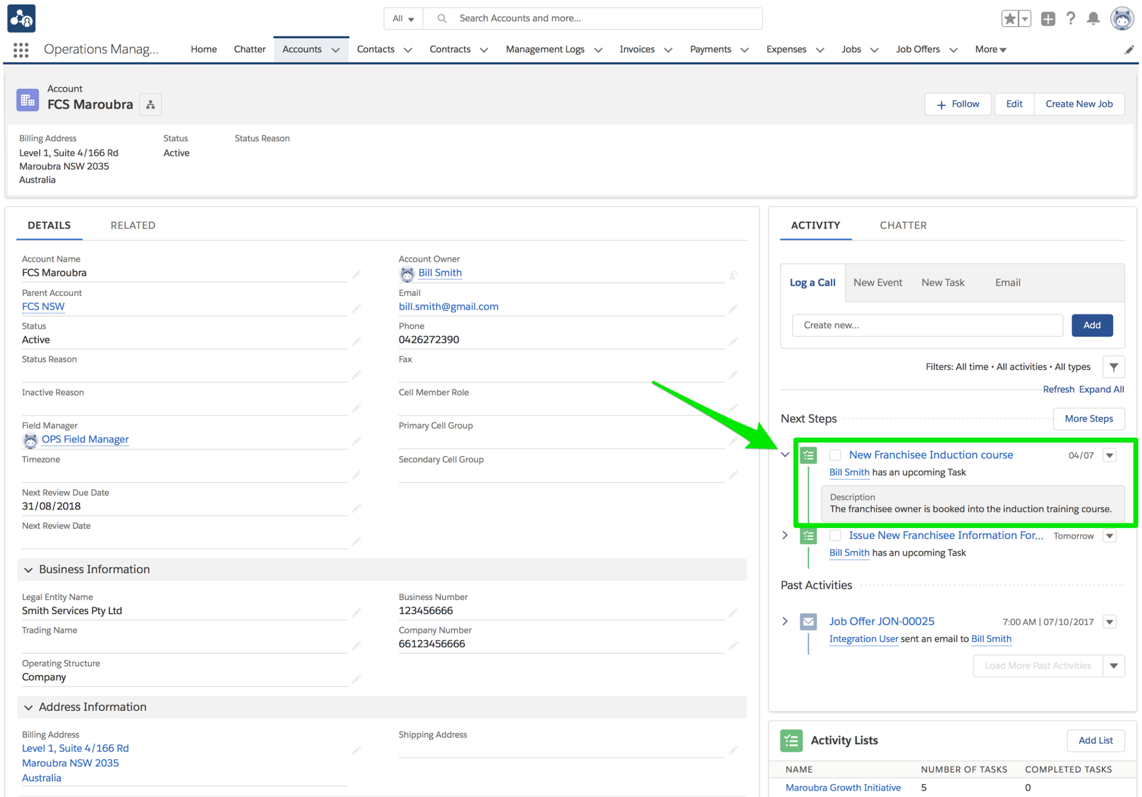
Working with activity list tasks

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



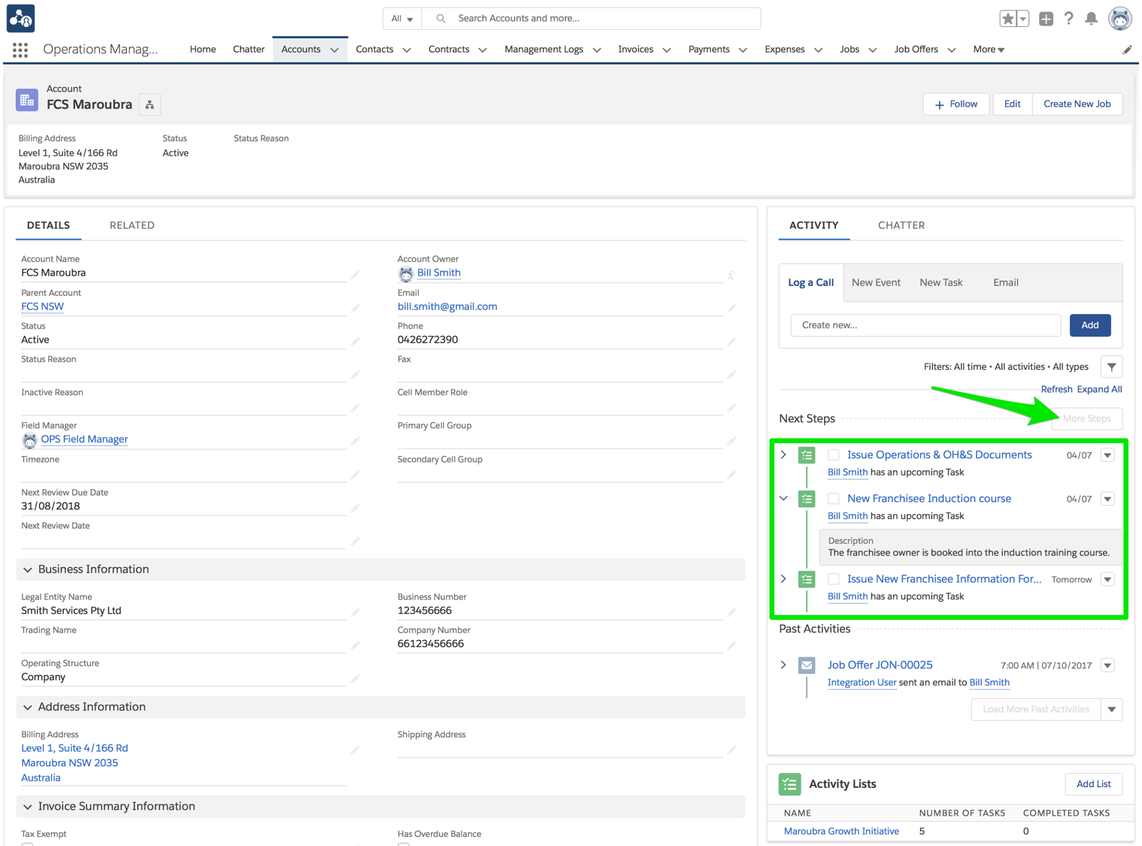
To view more details about an individual task:

» Click the task arrow to reveal more information.



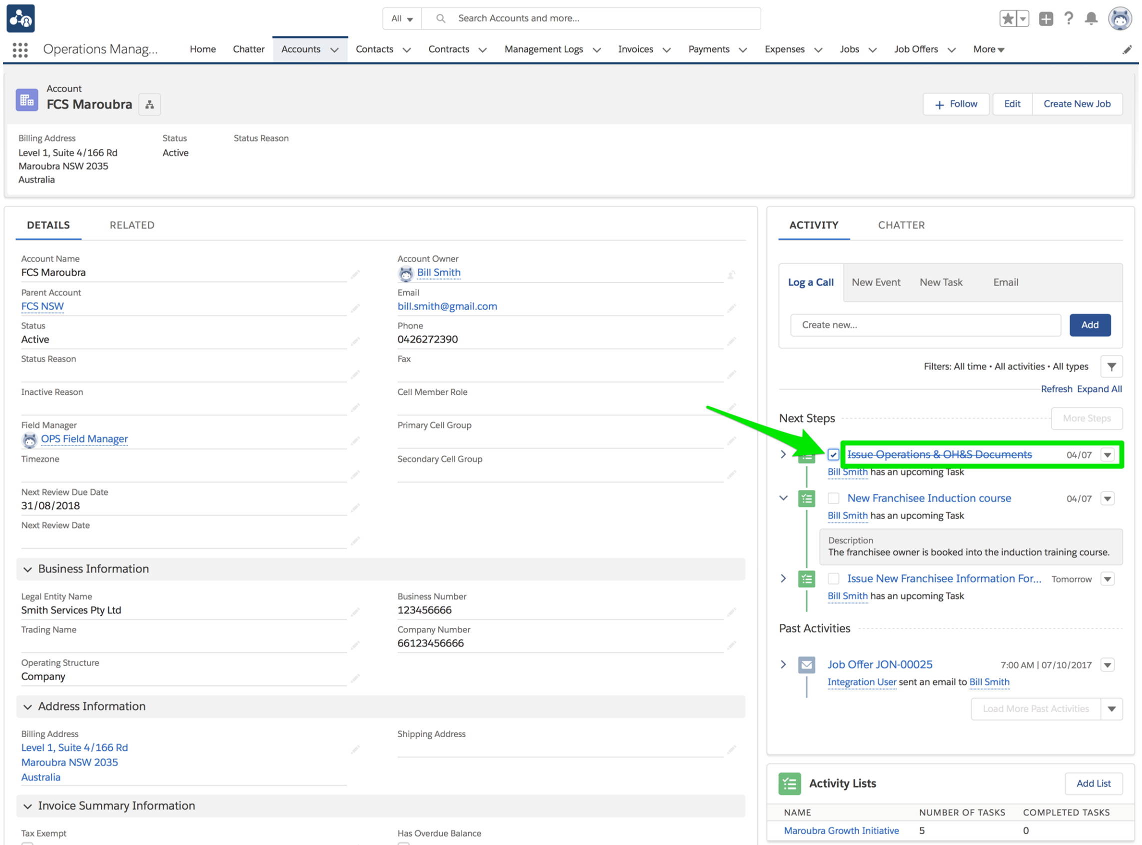
To reveal more tasks:

» Press **More Steps**.



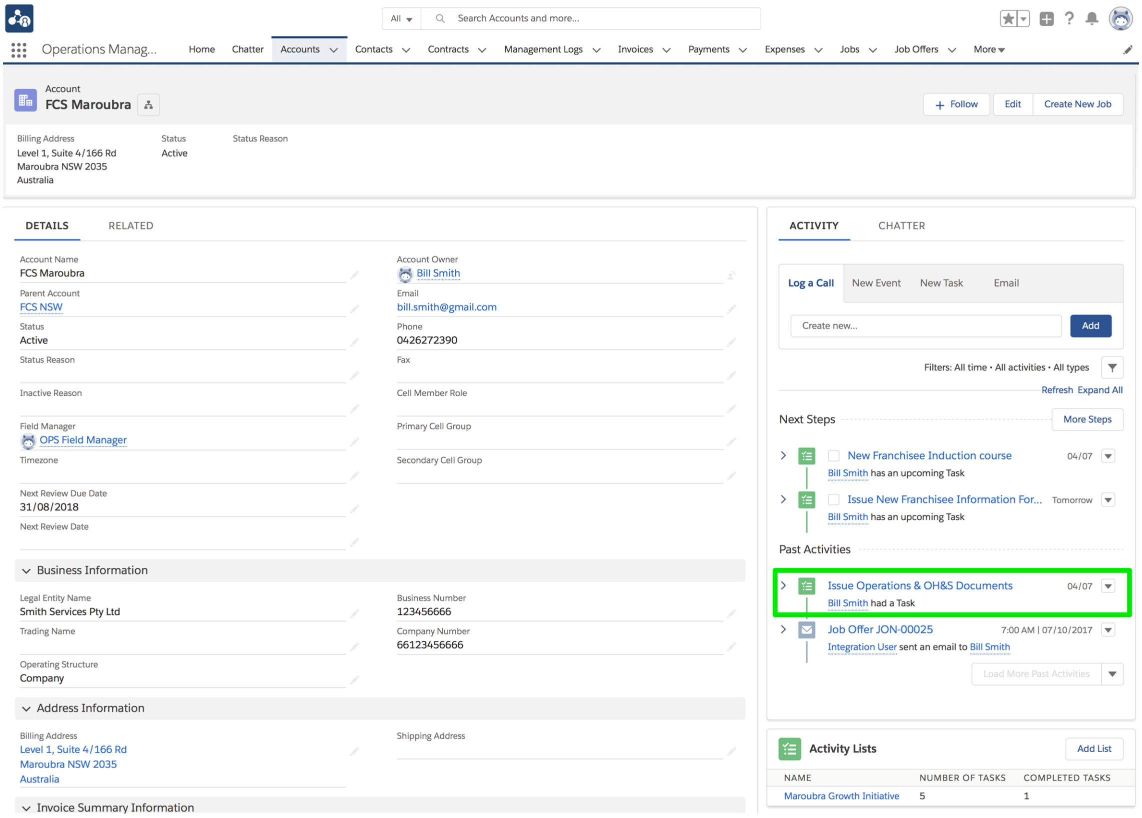
To mark a task as complete:

» Check the task check box.



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

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



CHAPTER 14

Working with Reports

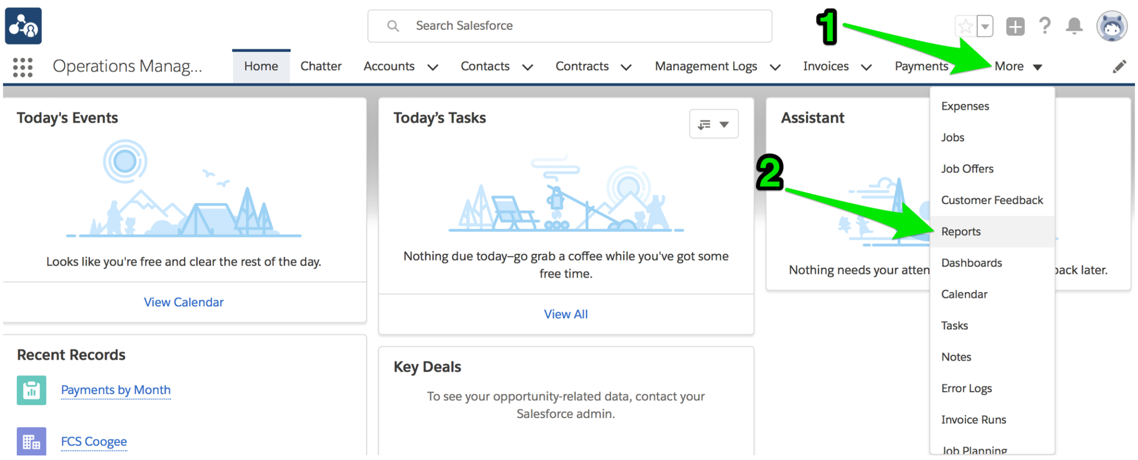
Understanding reports

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.

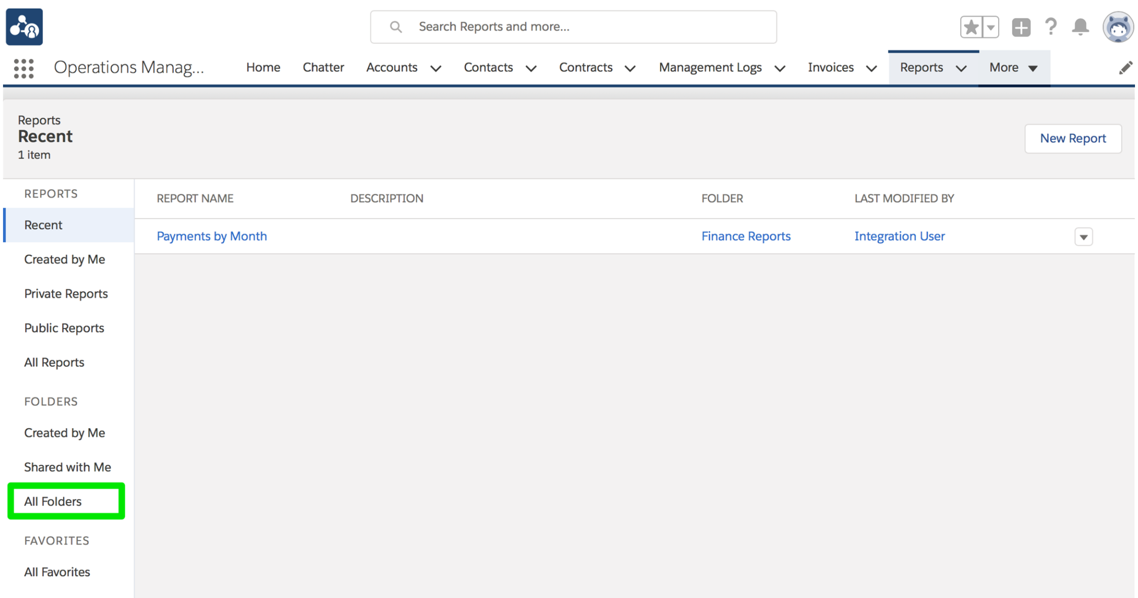
To discover available reports

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



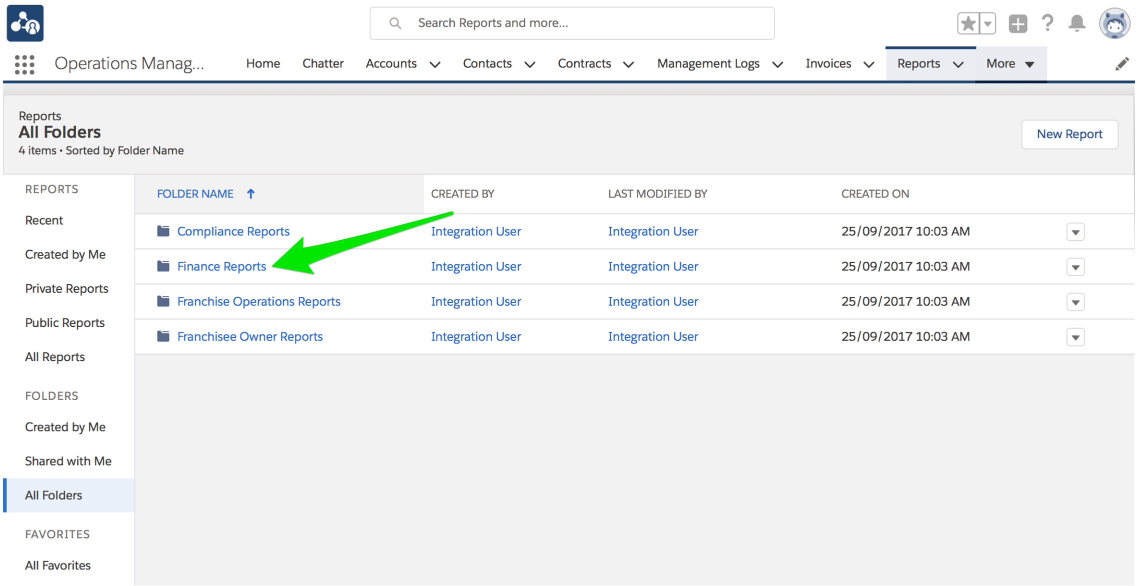
   The recent reports folder appears. If you have yet to use a report, this will be blank.

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

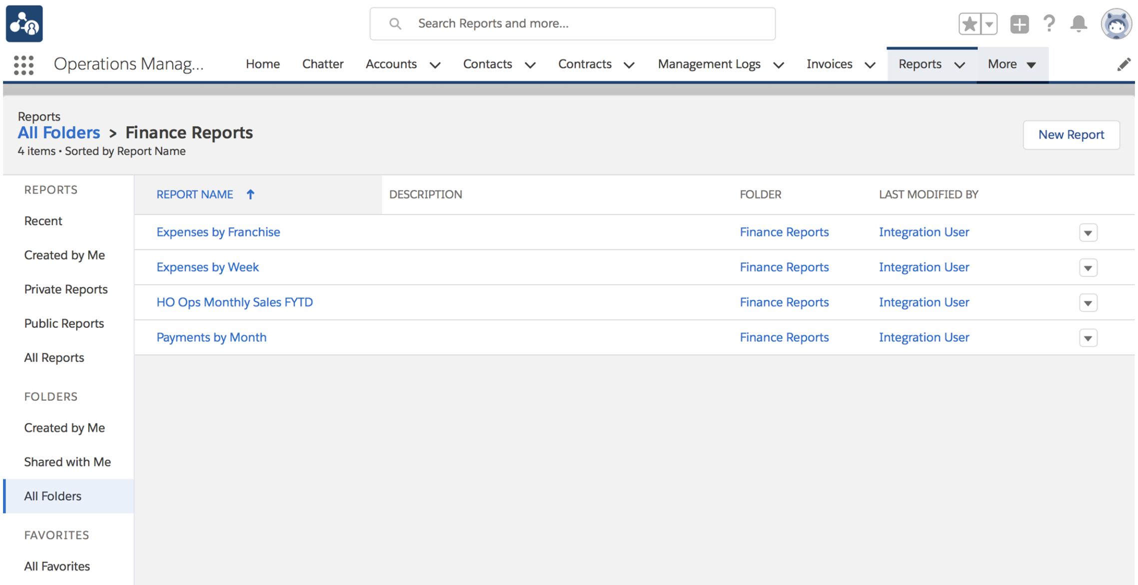


   There you will see each of the different categories of report that come with Operations Management.

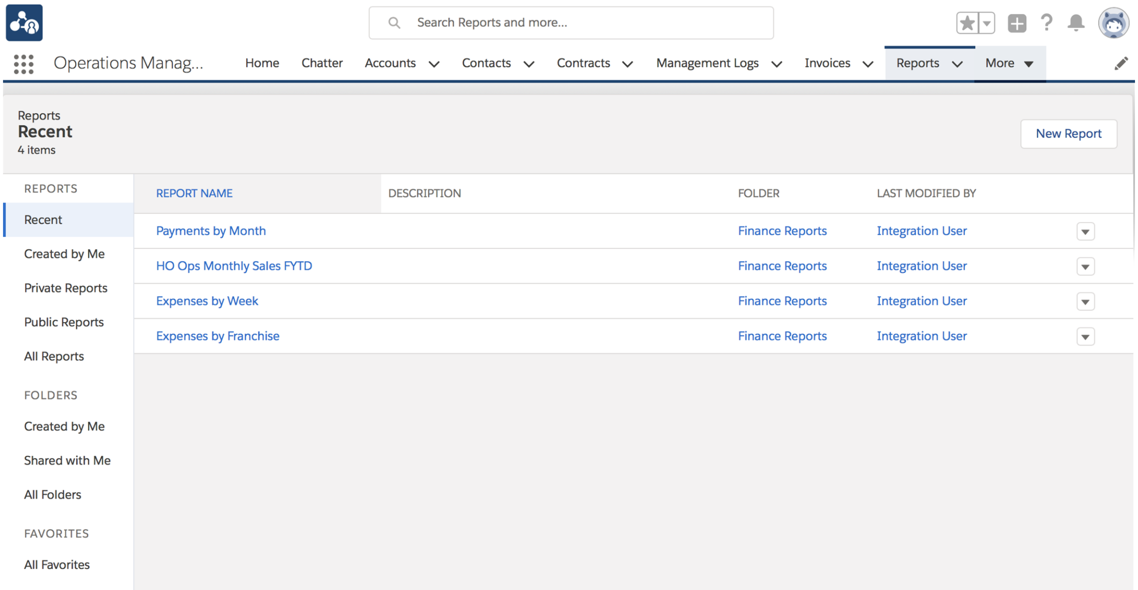
3. Select any one of the report folders.



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

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.

Franchise Operations Reports

Report Name	Description
Job Request Conversion	Job requests categorized by `Converted` and `Unconverted Status`.

Report Name	Description
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`.

Head Office Reports

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.
Envelopes by Sender this Month	Total envelopes sent this month by sender.
Envelopes by Sender this Quarter	Total envelopes sent this quarter by sender.

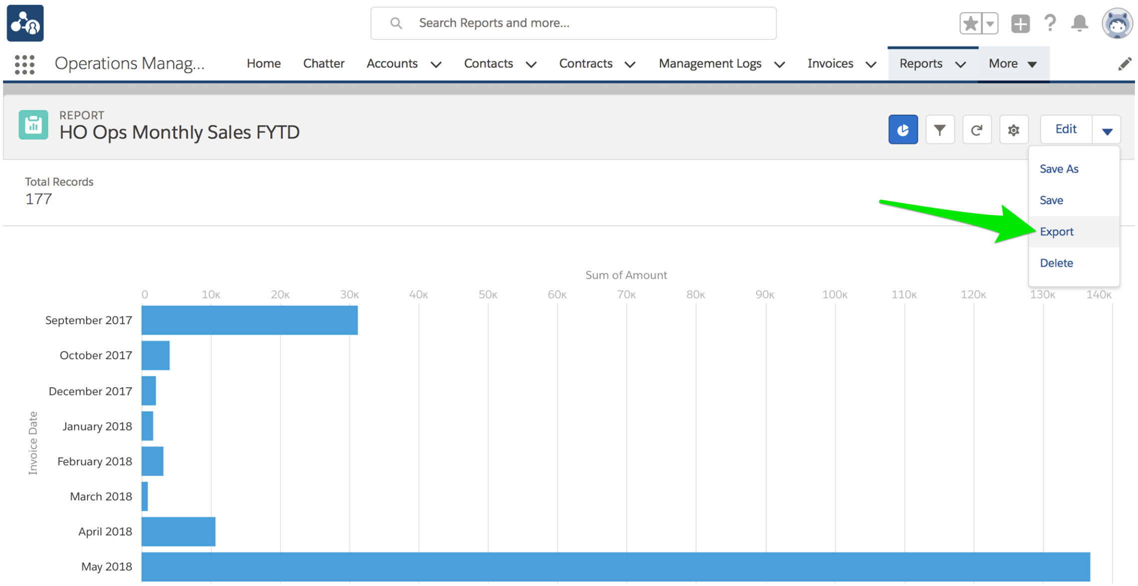
Report Name	Description
Envelopes by Sender YTD	Total envelopes sent this year to date by sender.
In Progress Envelopes	Envelopes sent and not voided, deleted or completed.
In Progress Envelopes Older than 72 Hours	All envelopes sent and not completed, deleted or voided 72 or more hours ago.
Percent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

How to export a report

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

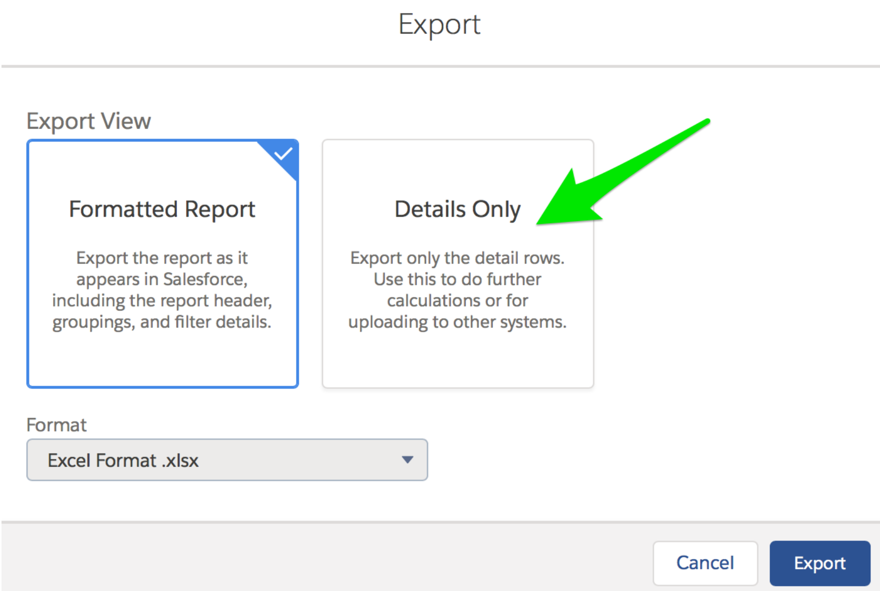
To export report results

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



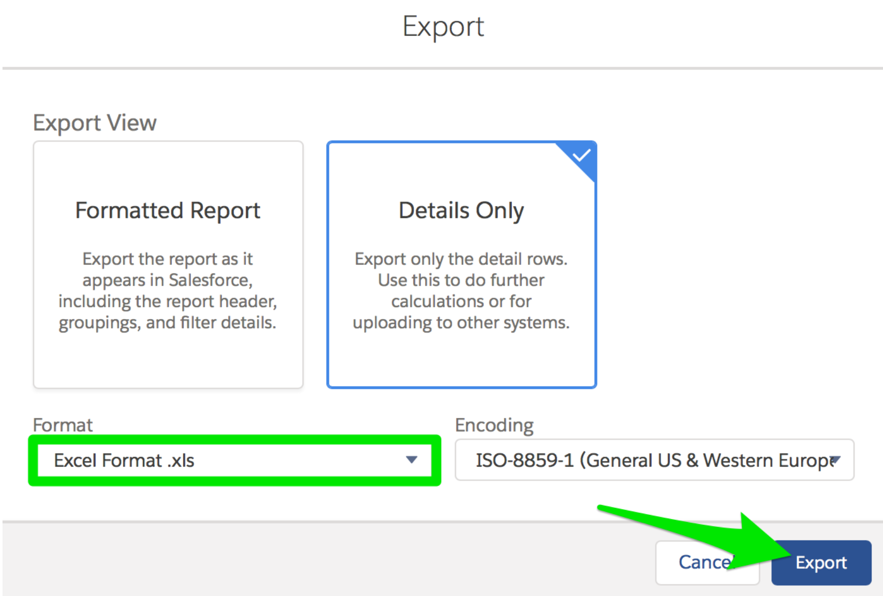
   The Export dialog box appears.

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



   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 325.
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.

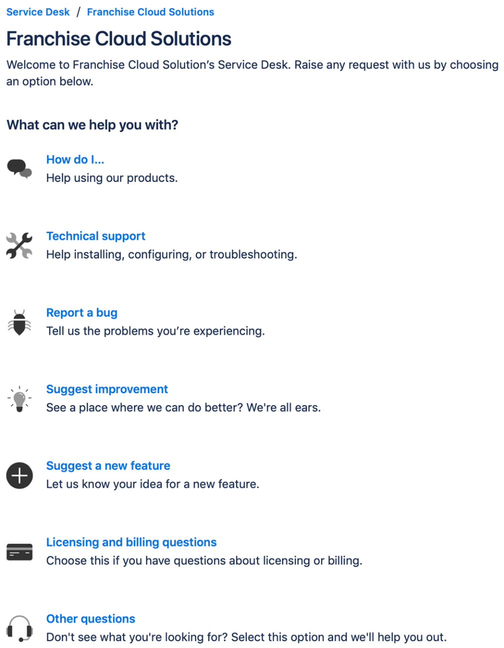
Contacting Customer Support

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

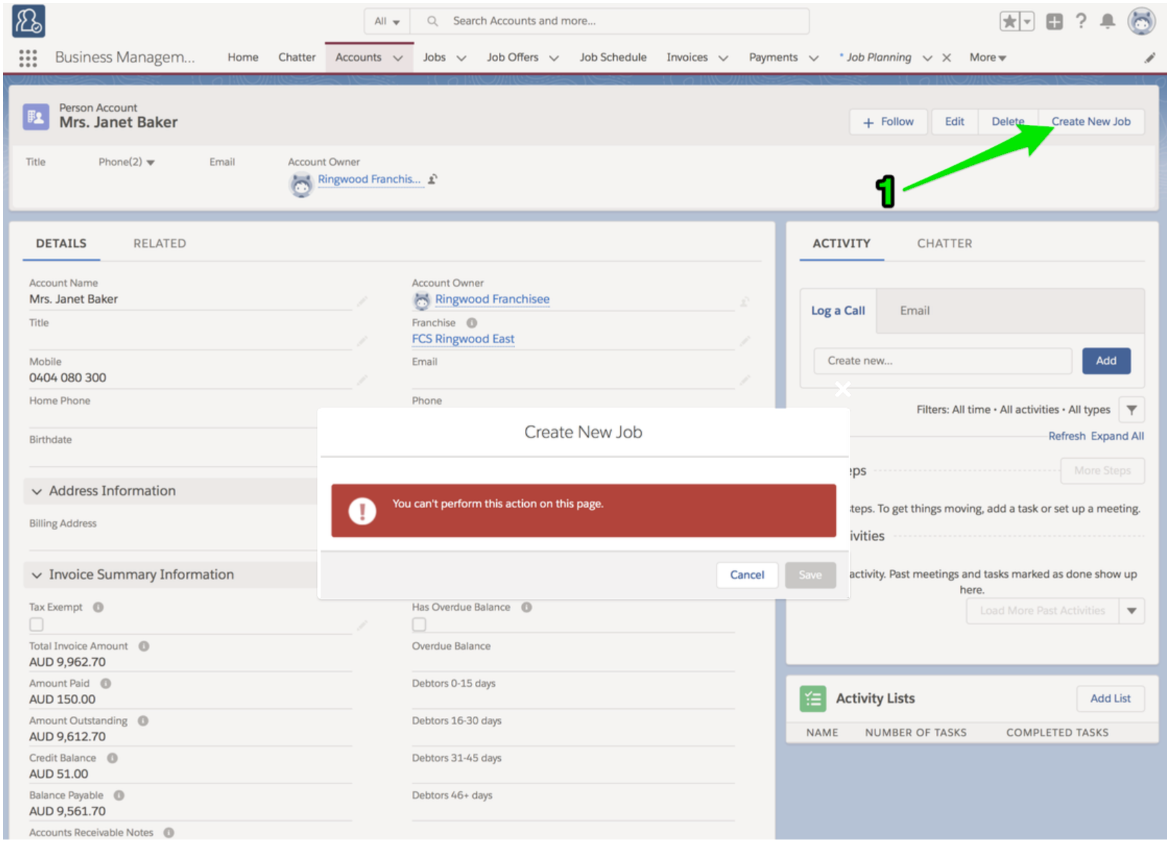
Cannot create new job from a customer's Account page.

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.

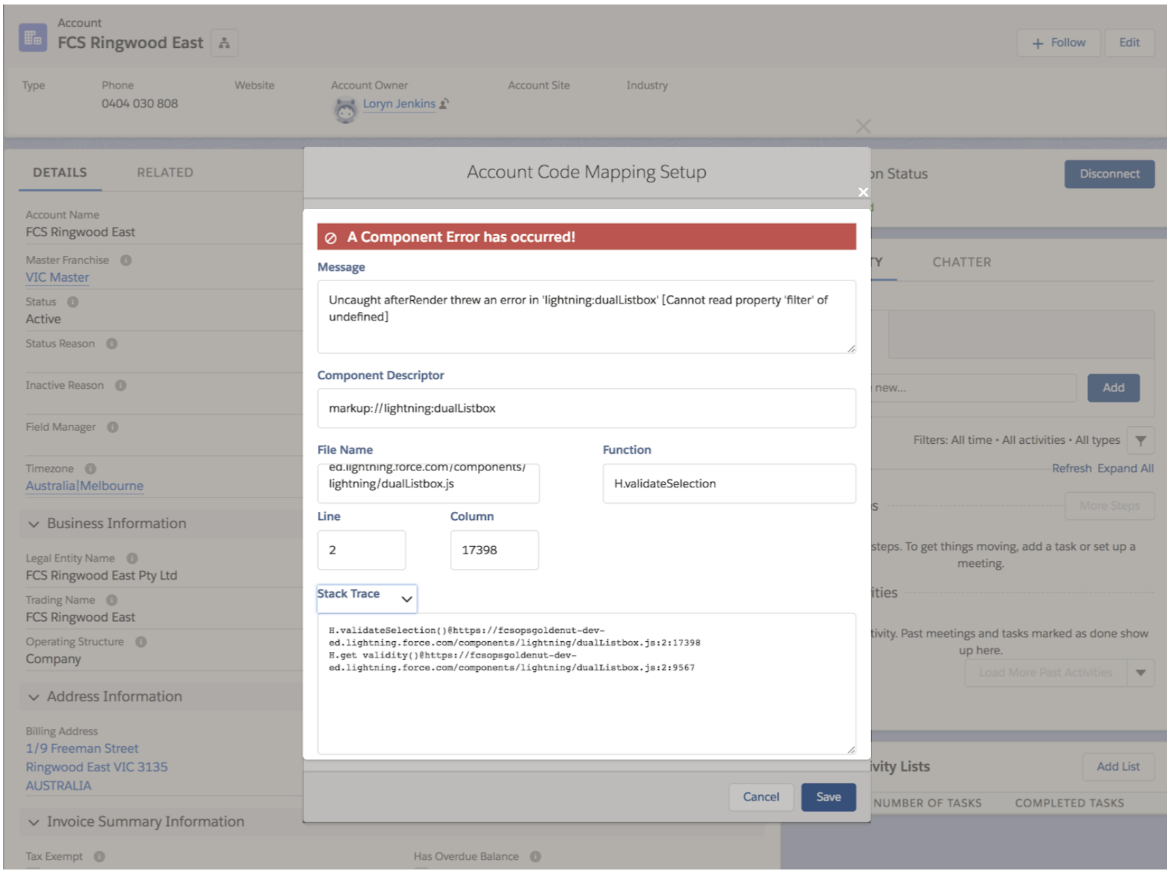
I'm logged into Golden UAT as system administrator.

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

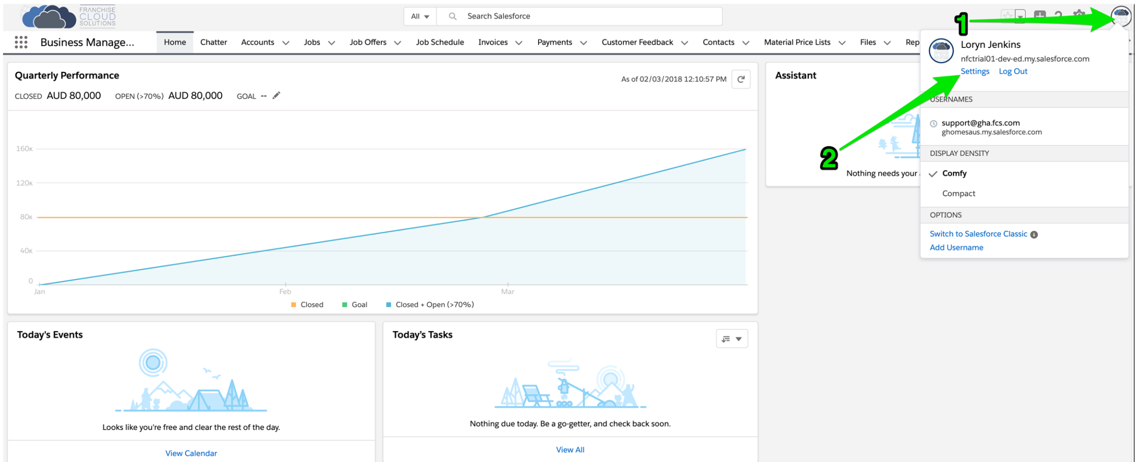
- Who affected: All franchisees, Users of Job Calendar.
- Visibility: 40 times per month per franchisee.
- Block: None.

Granting Account Login Access

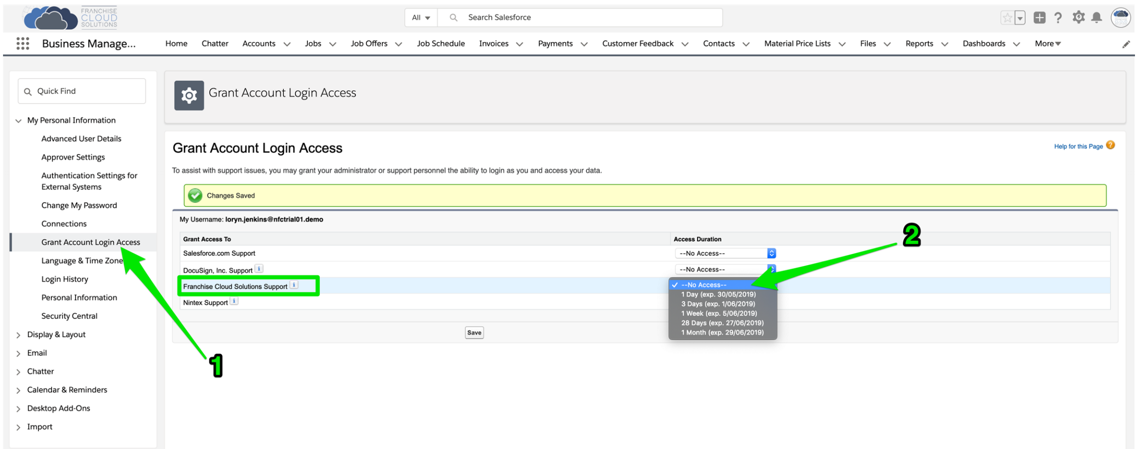
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

To provide our customer support team access to your system

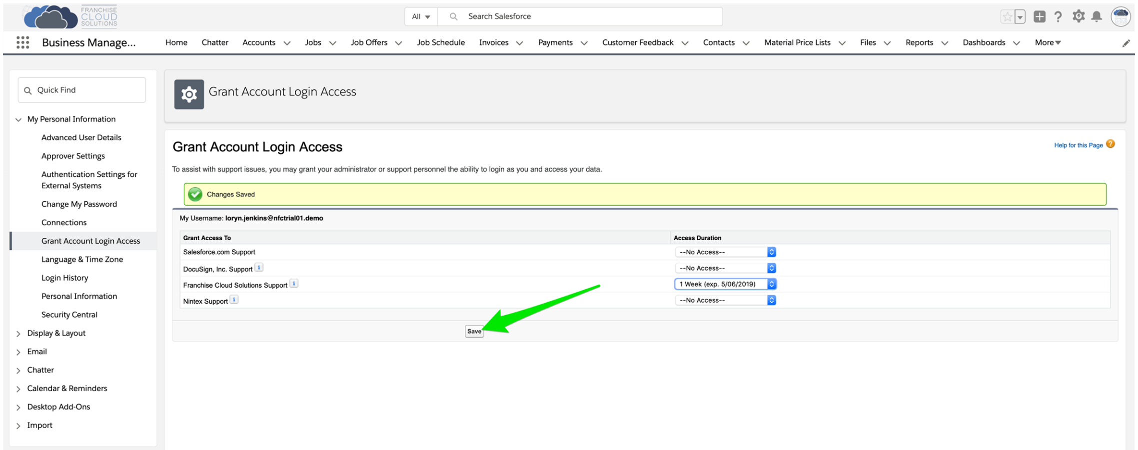
1. Select your account **Settings**.



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.