



# 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

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# 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](#).



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## Get Started with Salesforce

Salesforce, Spring '21



 @salesforcedocs  
Last updated: February 17, 2021



For more Salesforce user guides, See [Salesforce Downloadable User Guides](#).

## Where to start

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

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Salesforce, Spring '21



 @salesforcedocs  
Last updated: February 17, 2021



For more Salesforce user guides, See [Salesforce Downloadable User Guides](#).

## How Salesforce organizes information

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



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

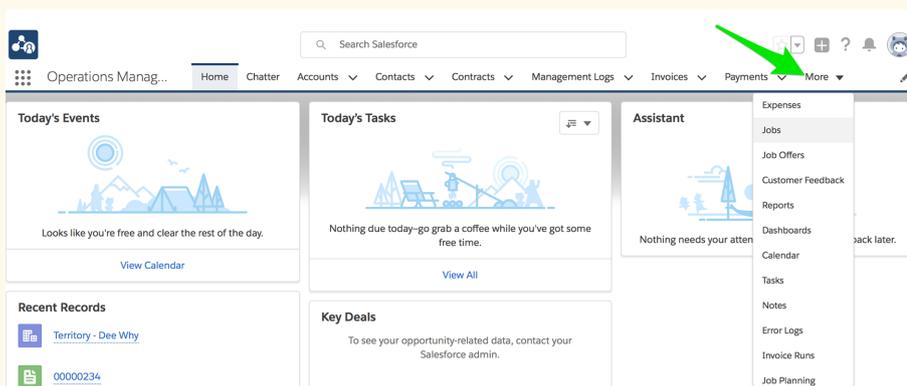
The Salesforce menu provides you access to each different type of record.



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.



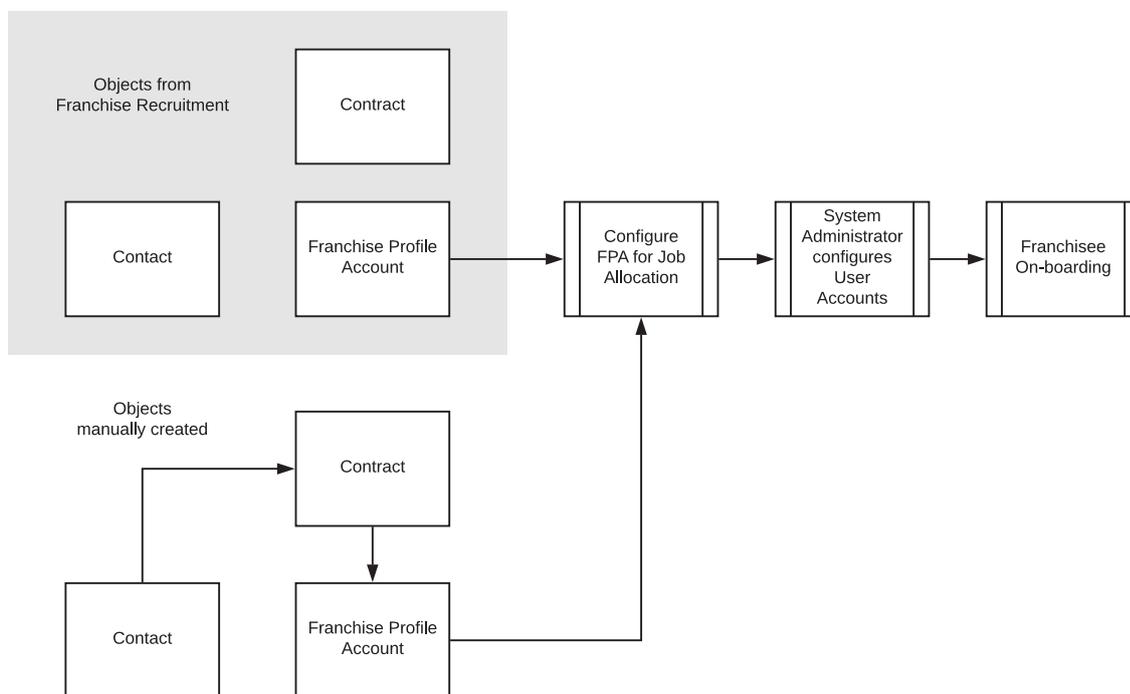
# Overview

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 onboarded 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

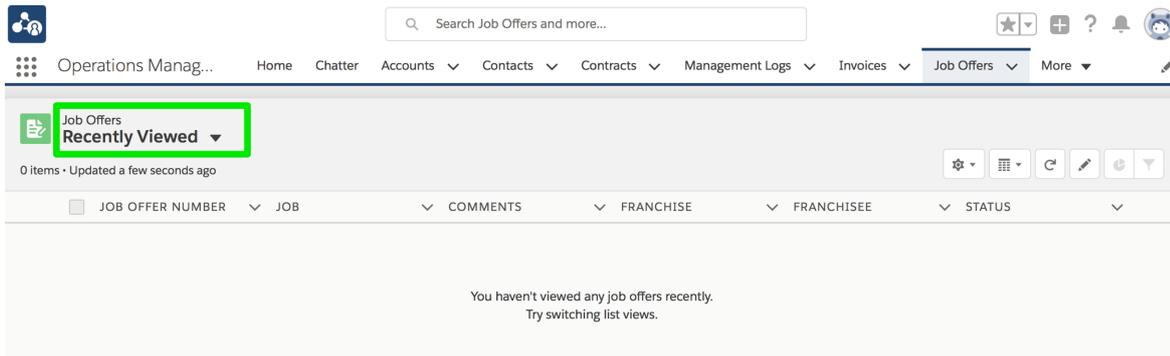
For assistance with logging into Salesforce, see the [Get Started with Salesforce](#) online help.

# 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.

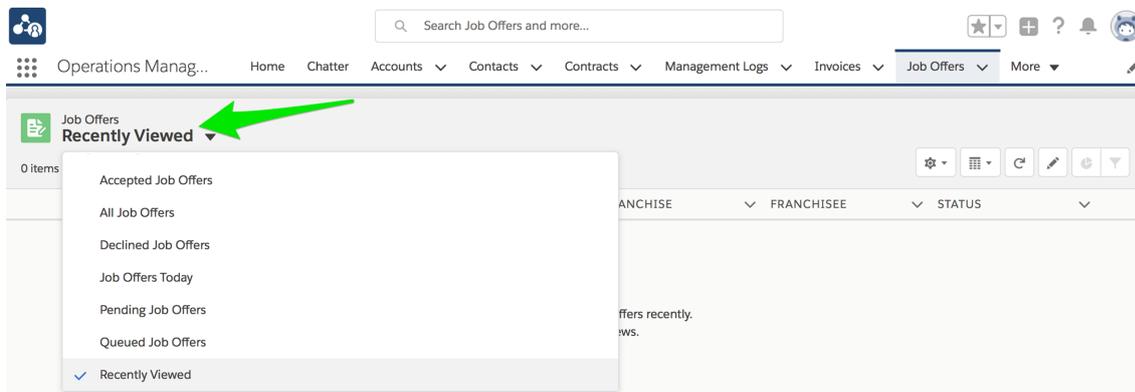
When you first open a menu, the first List View you see is likely to show you an empty list. Salesforce is showing you things you have viewed recently. This is known as the **Recently Viewed List View**.



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

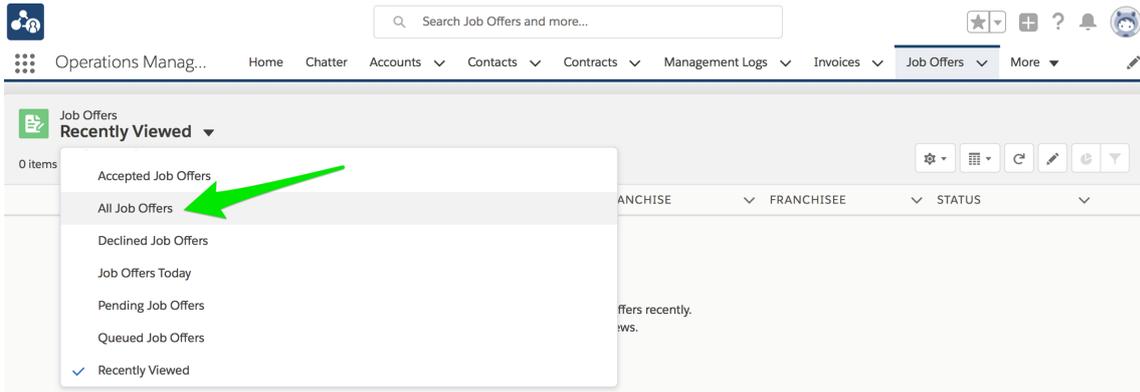
## To see some data

### 1. Click on **Recently Viewed**.



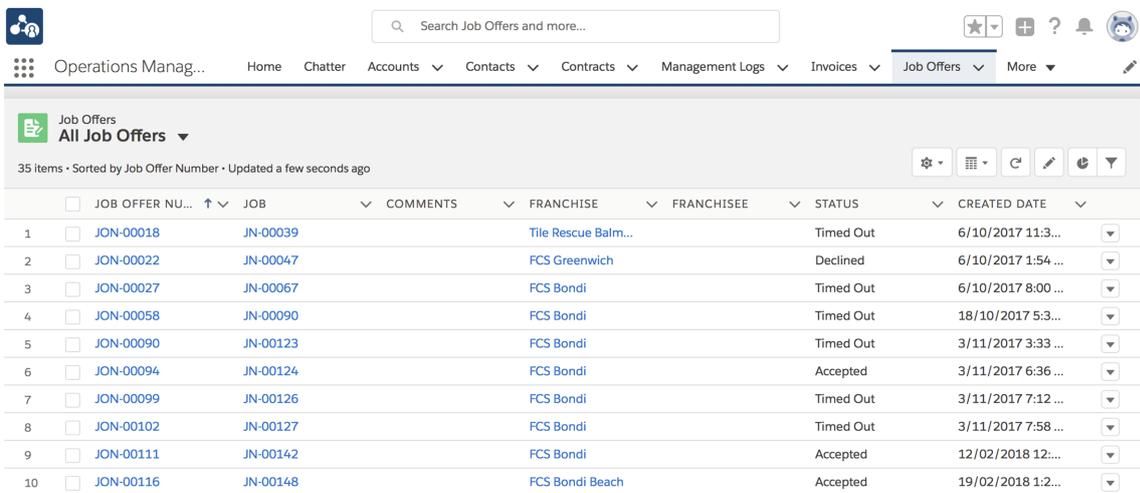
“Recently Viewed” is the name of a list that shows items you have viewed recently. Now that you have clicked on it, you can see the names of other lists.

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

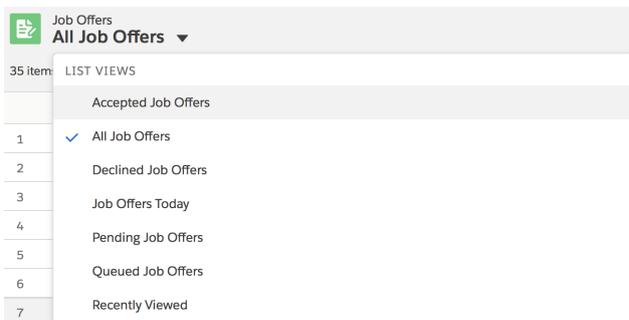


If there is data in your system, this list is likely to show it.

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



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



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

5. Now click away to a different tab.

The screenshot shows the Salesforce interface for Job Offers. The navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Job Offers', and 'More'. A search bar is located at the top right. The main content area is titled 'Job Offers All Job Offers' and shows a list of 35 items. The table has columns for Job Offer Number, Job, Comments, Franchise, Franchisee, Status, and Created Date. The first 10 rows are visible, showing various job offers with statuses like 'Timed Out', 'Declined', and 'Accepted'.

	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...

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.

The screenshot shows the Salesforce interface for Job Offers. The navigation bar is the same as in the previous screenshot. The main content area is titled 'Job Offers Recently Viewed' and shows 0 items. Below the table header, there is a message: 'You haven't viewed any job offers recently. Try switching list views.'

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.

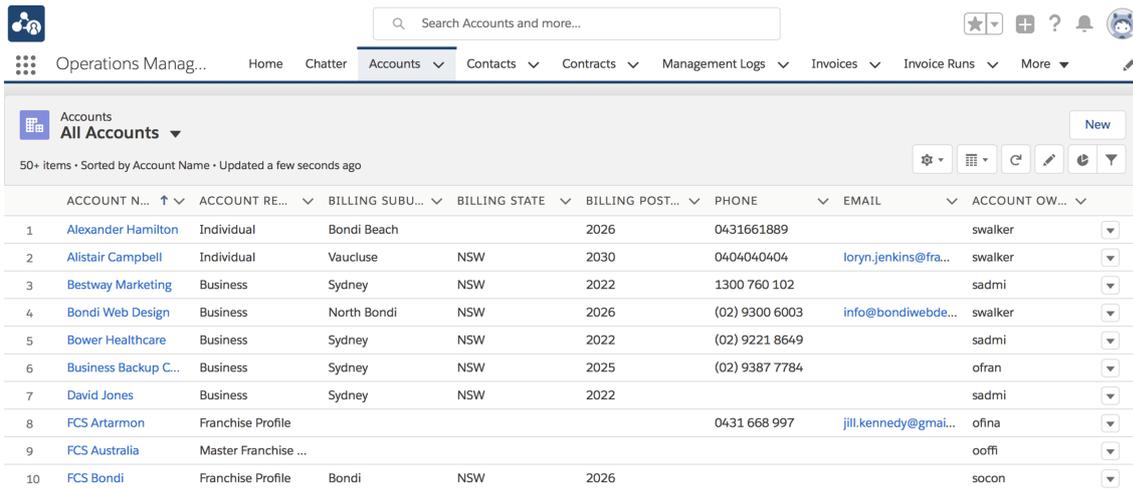
# How to customize a list view

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.

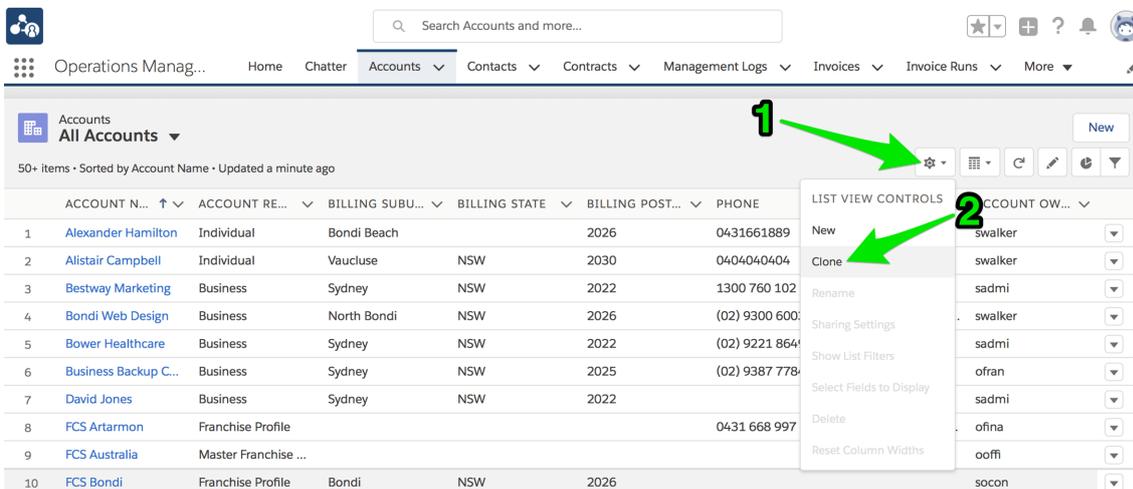
 Imagine you want to see the list of accounts that are belong to a specific territory. You could create a list view to show **Accounts for Territory**.

## 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.

Clone List View

\*List Name

Accounts for Territory

Who sees this list view?

Only I can see this list view

All users can see this list view

Cancel Save

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

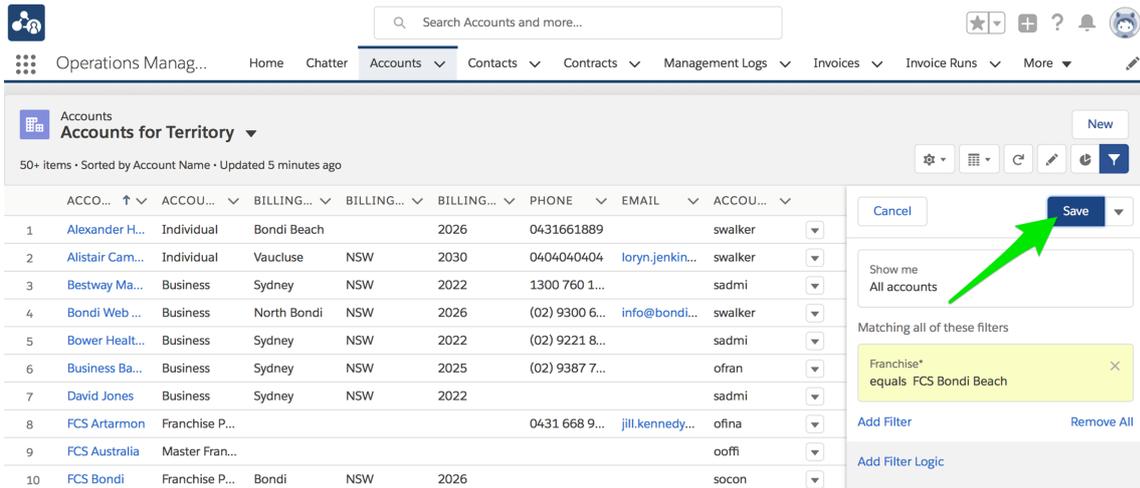
4. Choose the Add Filter link to add an extra filter condition.

The screenshot shows the 'Accounts for Territory' list view. A filter pane is open on the right side, showing a filter condition: '# Contacts equals [blank]'. The filter pane includes options to 'Add Filter' and 'Remove All'. The list view shows 50+ items sorted by Account Name, with columns for Account Name, Type, Location, and Year.

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

The screenshot shows the 'Accounts for Territory' list view with the filter pane open. The filter pane has three fields highlighted with green boxes and numbered 1, 2, and 3: 'Field' (Franchise), 'Operator' (equals), and 'Value' (FCS Bondi Beach). A green arrow points to the 'Done' button, which is highlighted with a green box and numbered 4. The filter pane also includes 'Cancel', 'Save', 'Add Filter', and 'Remove All' buttons.

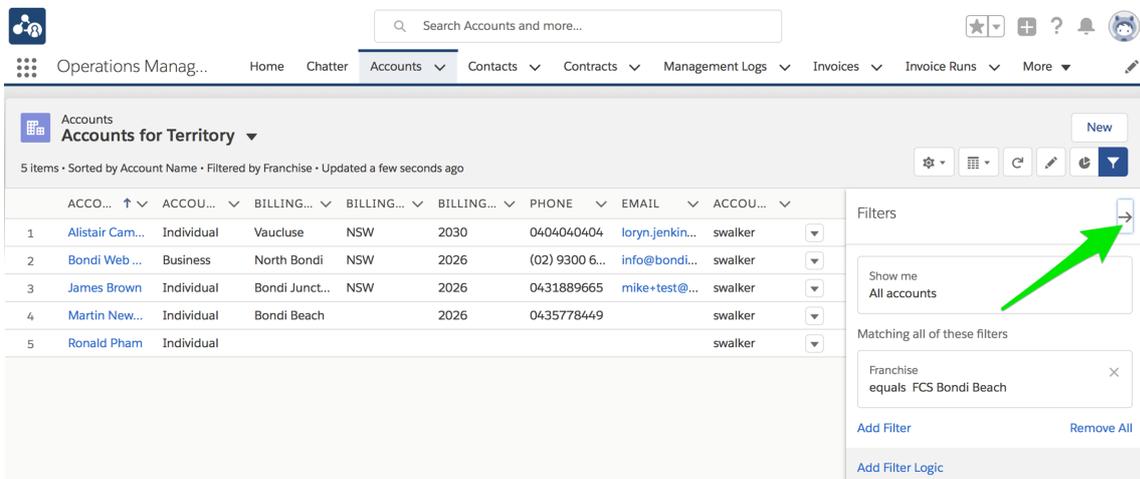
## 6. Now press Save.



The screenshot shows the 'Accounts for Territory' list view. The table contains 10 items. A green arrow points to the 'Save' button in the top right corner of the list view. The filters pane on the right shows a filter for 'Franchise equals FCS Bondi Beach'.

ACCO...	ACCO...	BILLING...	BILLING...	BILLING...	PHONE	EMAIL	ACCO...
1	Alexander H...	Individual	Bondi Beach	2026	0431661889	swalker	
2	Alistair Cam...	Individual	Vaucluse NSW	2030	0404040404	loryn.jenkin...	swalker
3	Bestway Ma...	Business	Sydney NSW	2022	1300 760 1...	sadmi	
4	Bondi Web ...	Business	North Bondi NSW	2026	(02) 9300 6...	info@bondi...	swalker
5	Bower Healt...	Business	Sydney NSW	2022	(02) 9221 8...	sadmi	
6	Business Ba...	Business	Sydney NSW	2025	(02) 9387 7...	ofran	
7	David Jones	Business	Sydney NSW	2022		sadmi	
8	FCS Artarmon	Franchise P...			0431 668 9...	jill.kennedy...	ofina
9	FCS Australia	Master Fran...				ooffi	
10	FCS Bondi	Franchise P...	Bondi NSW	2026		socon	

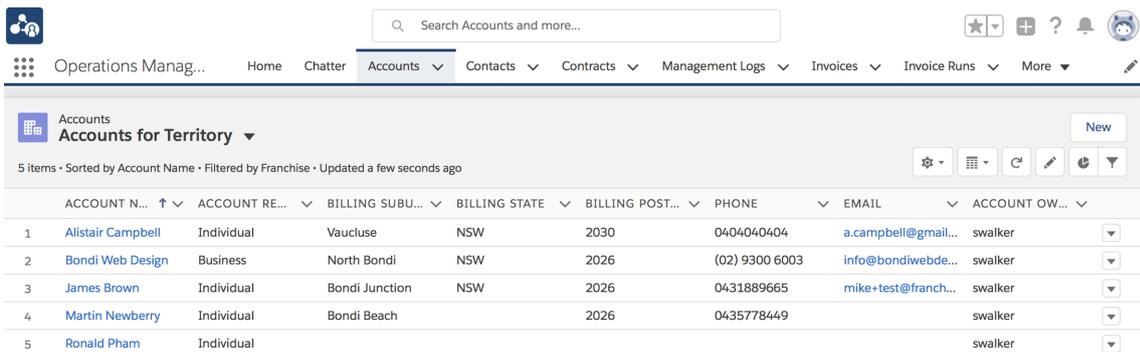
## 7. Press the arrow to remove the Filters pane.



The screenshot shows the 'Accounts for Territory' list view. The table contains 5 items. A green arrow points to the right-pointing arrow icon in the top right corner of the filters pane, indicating how to collapse it.

ACCO...	ACCO...	BILLING...	BILLING...	BILLING...	PHONE	EMAIL	ACCO...
1	Alistair Cam...	Individual	Vaucluse NSW	2030	0404040404	loryn.jenkin...	swalker
2	Bondi Web ...	Business	North Bondi NSW	2026	(02) 9300 6...	info@bondi...	swalker
3	James Brown	Individual	Bondi Junct... NSW	2026	0431889665	mike+test@...	swalker
4	Martin New...	Individual	Bondi Beach	2026	0435778449	swalker	
5	Ronald Pham	Individual				swalker	

Now you can see your newly modified list view.



The screenshot shows the 'Accounts for Territory' list view with the filters pane removed. The table contains 5 items.

ACCOUNT N...	ACCOUNT RE...	BILLING SUBU...	BILLING STATE	BILLING POST...	PHONE	EMAIL	ACCOUNT OW...
1	Alistair Campbell	Individual	Vaucluse NSW	2030	0404040404	a.campbell@gmail...	swalker
2	Bondi Web Design	Business	North Bondi NSW	2026	(02) 9300 6003	info@bondiwebde...	swalker
3	James Brown	Individual	Bondi Junction NSW	2026	0431889665	mike+test@franch...	swalker
4	Martin Newberry	Individual	Bondi Beach	2026	0435778449	swalker	
5	Ronald Pham	Individual				swalker	



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

# How to create your own list view

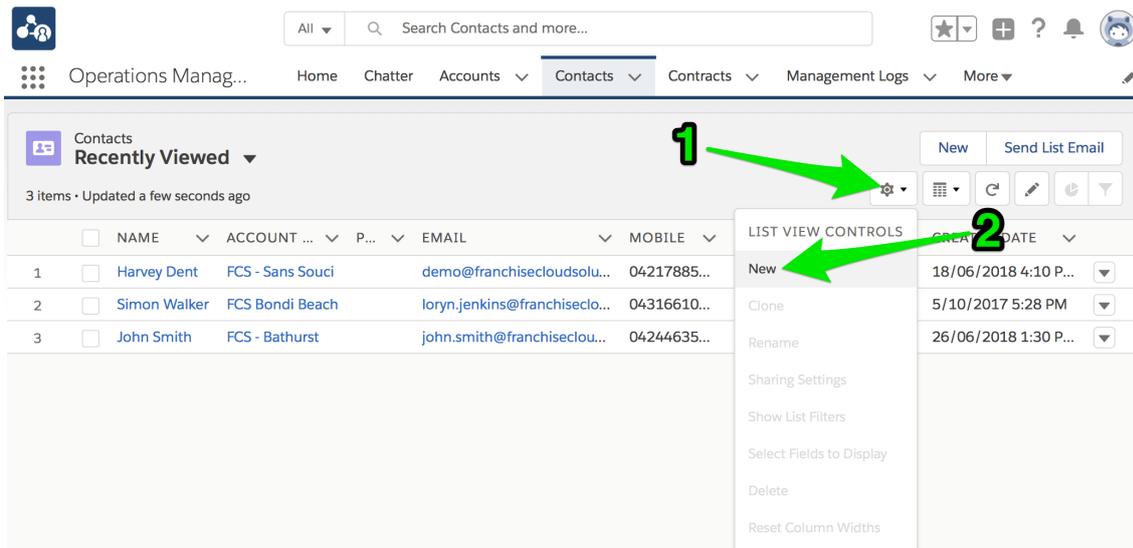
Creating your own list view can be a useful way to quickly access data.



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**.

New List View

---

\*List Name

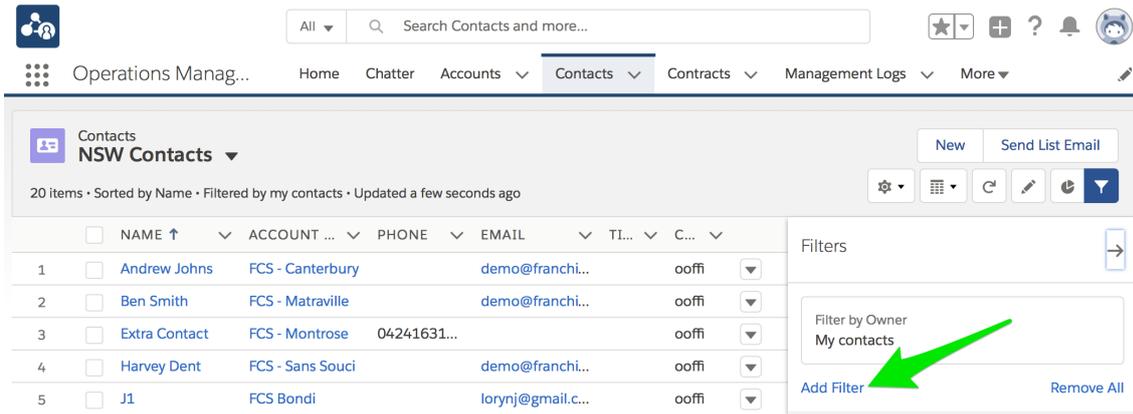
Who sees this list view?

Only I can see this list view

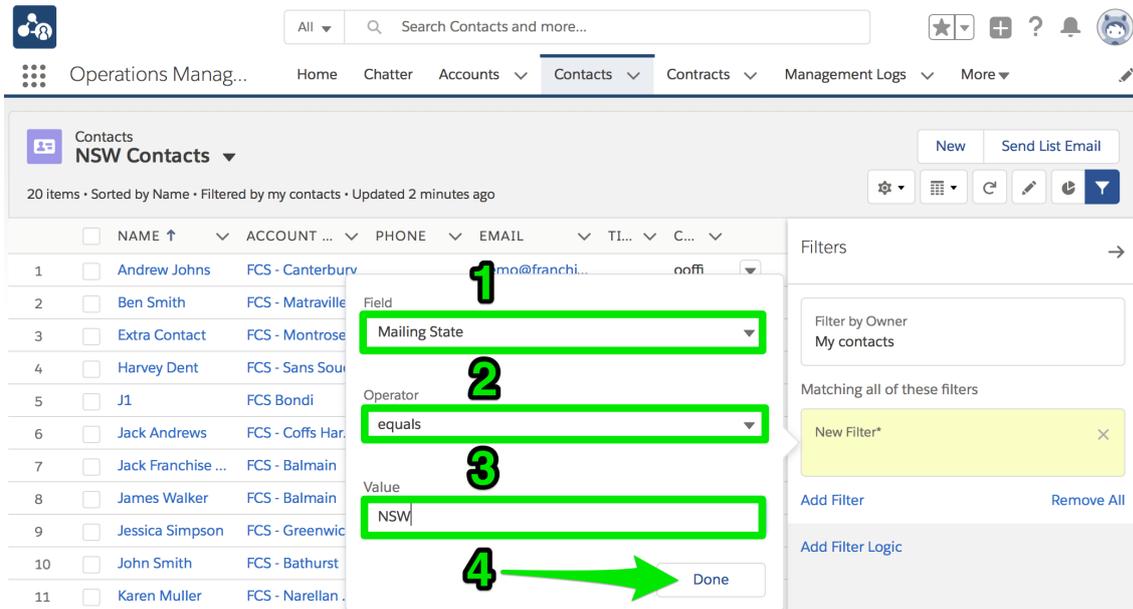
All users can see this list view ⓘ

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.

The screenshot shows the 'NSW Contacts' list with 20 items. The filters pane on the right is open, showing 'Filter by Owner My contacts' and 'Mailing State equals NSW'. A green arrow points to the 'Save' button in the filters pane.

	NAME ↑	ACCOUNT ...	PHONE	EMAIL	TI...	C...
1	Andrew Johns	FCS - Canterbury		demo@franchi...	ooffi	▼
2	Ben Smith	FCS - Matraville		demo@franchi...	ooffi	▼
3	Extra Contact	FCS - Montrose	04241631...		ooffi	▼
4	Harvey Dent	FCS - Sans Souci		demo@franchi...	ooffi	▼
5	J1	FCS Bondi		lorynj@gmail.c...	ooffi	▼
6	Jack Andrews	FCS - Coffs Har...		demo@franchi...	ooffi	▼
7	Jack Franchise ...	FCS - Balmain		jack@fcs.com.au	ooffi	▼
8	James Walker	FCS - Balmain	04111234...		ooffi	▼
9	Jessica Simpson	FCS - Greenwich		mike@franchis...	ooffi	▼

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

The screenshot shows the 'NSW Contacts' list with 16 items. The filters pane is still open, but a green arrow points to the close arrow button in the top right corner of the filters pane.

	NAME ↑	ACCOUNT ...	PHONE	EMAIL	TI...	C...
1	Andrew Johns	FCS - Canterbury		demo@franchi...	ooffi	▼
2	Ben Smith	FCS - Matraville		demo@franchi...	ooffi	▼
3	Harvey Dent	FCS - Sans Souci		demo@franchi...	ooffi	▼
4	J1	FCS Bondi		lorynj@gmail.c...	ooffi	▼
5	Jack Andrews	FCS - Coffs Har...		demo@franchi...	ooffi	▼
6	Jack Franchise ...	FCS - Balmain		jack@fcs.com.au	ooffi	▼
7	James Walker	FCS - Balmain	04111234...		ooffi	▼
8	Jessica Simpson	FCS - Greenwich		mike@franchis...	ooffi	▼

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

The screenshot shows the 'NSW Contacts' list with 16 items. The filters pane is closed, and the list view is updated to show 16 items.

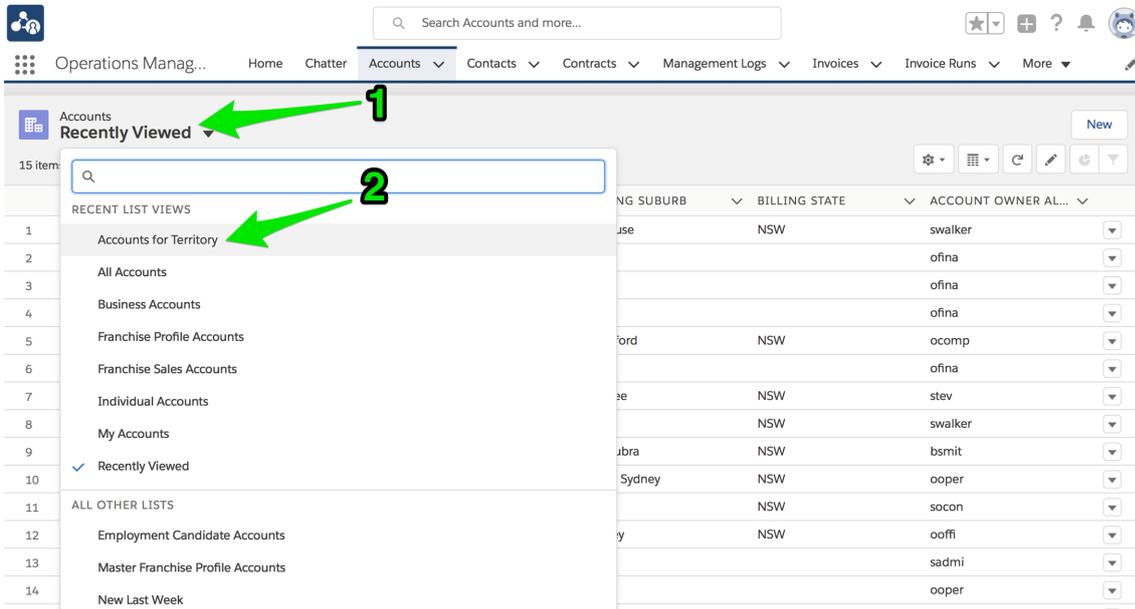
	NAME ↑	ACCOUNT NAME	PHONE	EMAIL	TITLE	CON...
1	Andrew Johns	FCS - Canterbury		demo@franchisecloudsolutions.com	ooffi	▼
2	Ben Smith	FCS - Matraville		demo@franchisecloudsolutions.com	ooffi	▼
3	Harvey Dent	FCS - Sans Souci		demo@franchisecloudsolutions.com	ooffi	▼
4	J1	FCS Bondi		lorynj@gmail.com	ooffi	▼
5	Jack Andrews	FCS - Coffs Harbour		demo@franchisecloudsolutions.com	ooffi	▼

# How to add columns to a list view

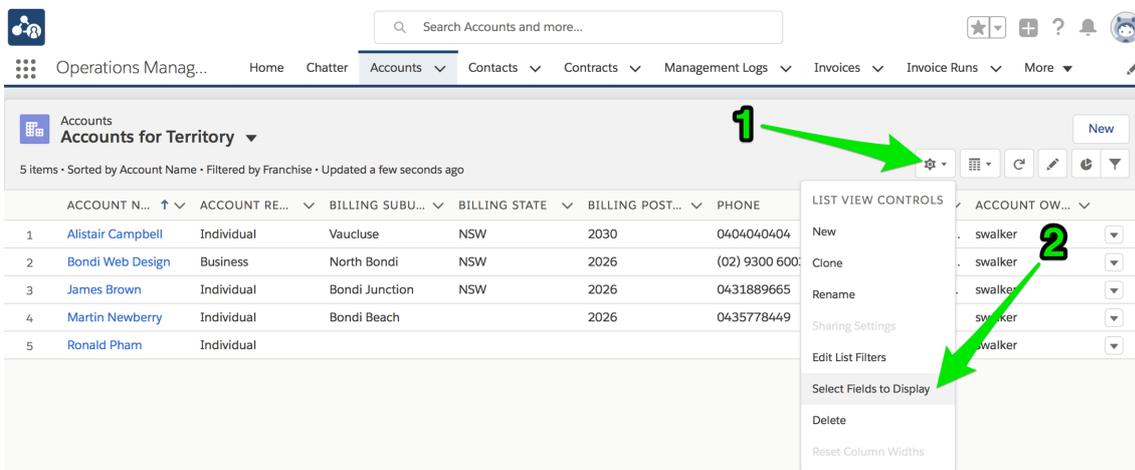
You can add columns to any custom list view.

## 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.

Select Fields to Display

Available Fields	Visible Fields
Field Manager	Account Name
First Name	Account Record Type
<b>Franchise</b>	Billing Suburb
Gross Profit Actual	> Billing State
Gross Profit Target	Billing Postcode
Has Overdue Balance	Phone
Home Phone	< Email
Hourly Cost	Account Owner Alias
Inactive Reason	
Industry	
Initial Contact Date	

Cancel Save

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

Select Fields to Display

Available Fields	Visible Fields
Field Manager	Account Name
First Name	Account Record Type
Gross Profit Actual	<b>Billing Suburb</b>
Gross Profit Target	> Billing State
Has Overdue Balance	Billing Postcode
Home Phone	Phone
Hourly Cost	< Email
Inactive Reason	Account Owner Alias
Industry	Franchise
Initial Contact Date	
Insurance End Date	

Cancel Save

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

Select Fields to Display

Available Fields

- FAC Nomination
- FAC Since
- Fax
- Field Manager
- First Name
- Gross Profit Actual
- Gross Profit Target
- Has Overdue Balance
- Home Phone
- Hourly Cost
- Inactive Reason

Visible Fields

- Account Name
- Account Record Type
- Franchise
- Phone
- Email
- Account Owner Alias

Cancel Save

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

Select Fields to Display

Available Fields

- FAC Nomination
- FAC Since
- Fax
- Field Manager
- First Name
- Gross Profit Actual
- Gross Profit Target
- Has Overdue Balance
- Home Phone
- Hourly Cost
- Inactive Reason

Visible Fields

- Account Name
- Account Record Type
- Franchise
- Phone
- Email
- Account Owner Alias

Cancel Save

Now you can see the updated list.

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

Accounts for Territory

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

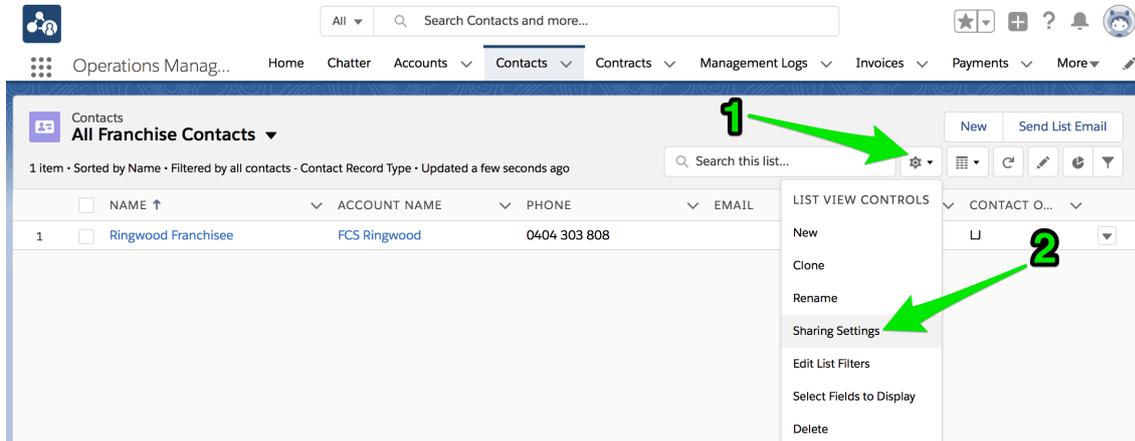
	ACCOUNT NAME ↑	ACCOUNT RECORD T...	FRANCHISE	PHONE	EMAIL	ACCOUNT OWNER AL...
1	Alistair Campbell	Individual	FCS Bondi Beach	0404040404	a.campbell@gmail.com.ux	swalker
2	Bondi Web Design	Business	FCS Bondi Beach	(02) 9300 6003	info@bondiwebdesign.com	swalker
3	James Brown	Individual	FCS Bondi Beach	0431889665	mike+test@franchiseclou...	swalker
4	Martin Newberry	Individual	FCS Bondi Beach	0435778449		swalker
5	Ronald Pham	Individual	FCS Bondi Beach			swalker

## How to share list views

You can share your list views with your colleagues.

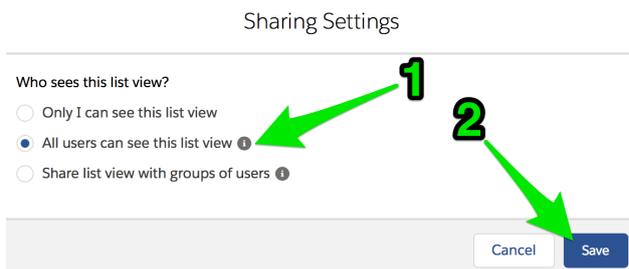
### To share a list view

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



The **Sharing Settings** dialog box appears.

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



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

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# 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 Solutions Franchise 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 <code>Customer Signed Date</code> and the <code>Customer Signed By</code> 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

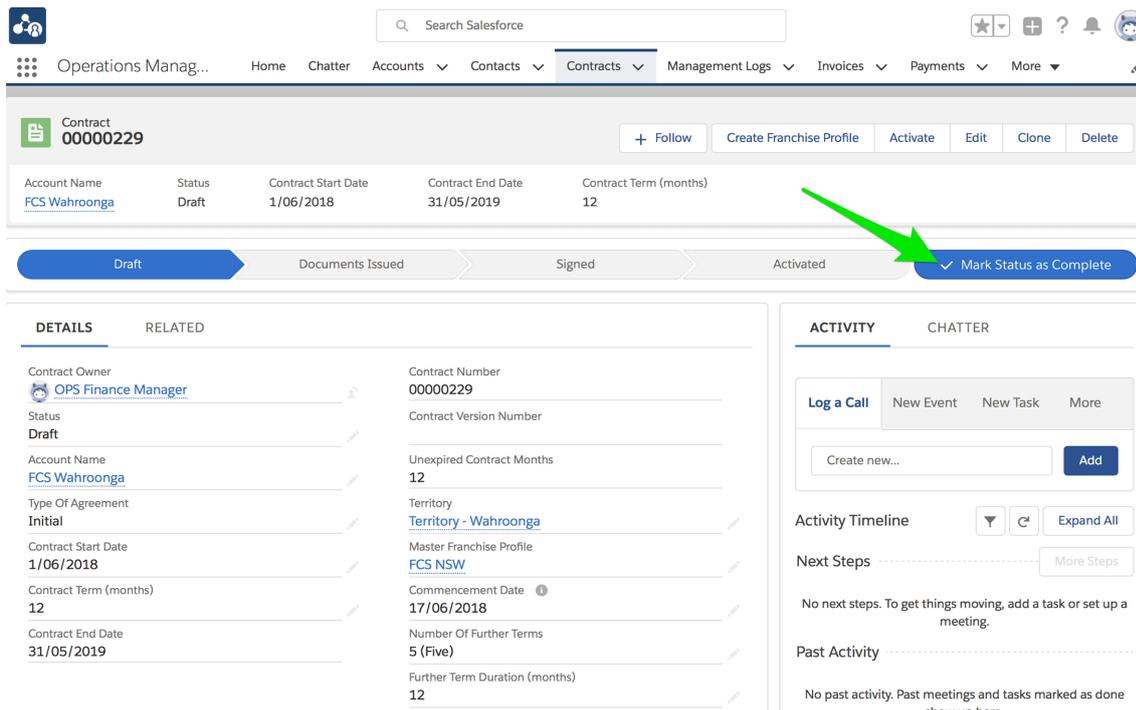
When a contract is first created it is placed in the Draft status. The Draft status is where all the relevant details of the contract are entered and edited. The Draft status is complete when it matches the contract you have (or will) provide to the franchisee for consideration.

## 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 screenshot shows the Salesforce interface for a contract record. The contract number is 00000229. The status is Draft. The contract start date is 1/06/2018 and the end date is 31/05/2019. The contract term is 12 months. The account name is FCS Wahroonga. The status bar shows a progression from Draft to Documents Issued, Signed, and Activated, with a 'Mark Status as Complete' button highlighted by a green arrow.

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">FCS Wahroonga</a>	Draft	1/06/2018	31/05/2019	12

**DETAILS** RELATED

Contract Owner <a href="#">OPS Finance Manager</a>	Contract Number 00000229
Status Draft	Contract Version Number
Account Name <a href="#">FCS Wahroonga</a>	Unexpired Contract Months 12
Type Of Agreement Initial	Territory <a href="#">Territory - Wahroonga</a>
Contract Start Date 1/06/2018	Master Franchise Profile <a href="#">FCS NSW</a>
Contract Term (months) 12	Commencement Date 17/06/2018
Contract End Date 31/05/2019	Number Of Further Terms 5 (Five)
	Further Term Duration (months) 12

**ACTIVITY** CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

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

Past Activity

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

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**.

The screenshot shows the Salesforce interface for a contract record with ID 00000229. The 'Contract Execution' section is expanded, showing fields for 'Customer Signed Date' and 'Customer Signed By'. A green arrow points to the 'Customer Signed By' field. The 'Initial Purchase Information' section includes fields for 'Initial Fee', 'Deposit Amount', 'Balance Amount', 'Personal Release Signed', 'Deposit Date', and 'Balance Due Date'. The 'Compliance Information' section includes fields for 'Legal Entity Name', 'Trading Name', 'Operating Structure', 'Business Number', and 'Company Number'. The 'Past Activity' section shows no activity. The 'Activity Lists' section is also visible.

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

The screenshot shows the same Salesforce interface, but with data entered in the 'Contract Execution' section. The 'Customer Signed Date' field is set to '31/05/2018' and the 'Customer Signed By' field is set to 'Hal Gregory'. A green arrow points to the 'Save' button at the bottom of the form. The 'Compliance Information' section is also visible, showing fields for 'Legal Entity Name', 'Trading Name', 'Operating Structure', 'Business Number', and 'Company Number'.

### 3. The Stage automatically advances to Signed.

The screenshot displays the Salesforce Operations Management interface for a contract. At the top, there is a search bar and navigation tabs for Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, Payments, and More. The main header shows the contract ID 00000229 with buttons for Follow, Create Variation, Create Renewal, and Cease Contract. Below this, a table lists contract details: Account Name (FCS Wahroonga), Status (Signed), Contract Start Date (1/06/2018), Contract End Date (31/05/2019), and Contract Term (months) (12). A progress bar below the table shows stages: Signed (active), Activated, Deactivation in Pr..., and Deactivated, with a 'Mark Status as Complete' button. The interface is divided into two main sections: DETAILS and ACTIVITY. The DETAILS section is further split into RELATED and ACTIVITY sub-sections. The RELATED section lists contract owner (OPS Finance Manager), status (Signed), account name (FCS Wahroonga), type of agreement (Initial), contract start date (1/06/2018), contract term (12), contract end date (31/05/2019), and unexpired contract months (12). The ACTIVITY section lists contract number (00000229), contract version number, territory (Territory - Wahroonga), master franchise profile (FCS NSW), purchase history (PH-000034), previous contract, number of further terms (5 (Five)), and further term duration (12). The ACTIVITY sub-section includes buttons for Log a Call, New Event, New Task, and More, a 'Create new...' input field, and an 'Add' button. Below these are sections for Activity Timeline, Next Steps (with a 'More Steps' button), and Past Activity, all showing 'No next steps' and 'No past activity'.



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 screenshot shows the contract management interface for contract 00000229. The status is 'Signed'. A green arrow points to the 'Mark Status as Complete' button in the status progression bar. The details section shows the contract owner as OPS Finance Manager, account name as FCS Wahroonga, and contract start/end dates as 1/06/2018 and 31/05/2019 respectively. The activity section shows no next steps or past activity.

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">FCS Wahroonga</a>	Signed	1/06/2018	31/05/2019	12

Progression: ✓ ✓ Signed Activated Deactivation in Pr... Deactivated ✓ Mark Status as Complete

**DETAILS** RELATED

Contract Owner: [OPS Finance Manager](#)  
Status: **Signed**  
Account Name: [FCS Wahroonga](#)  
Type Of Agreement: **Initial**  
Contract Start Date: **1/06/2018**  
Contract Term (months): **12**  
Contract End Date: **31/05/2019**  
Unexpired Contract Months: **12**

Contract Number: **00000229**  
Contract Version Number:  
Territory: [Territory - Wahroonga](#)  
Master Franchise Profile: [FCS NSW](#)  
Purchase History: [PH-000034](#)  
Previous Contract:  
Number Of Further Terms: **5 (Five)**  
Further Term Duration (months): **12**

**ACTIVITY** CHATTER

**Log a Call** New Event New Task More

Create new...

Activity Timeline

Next Steps

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

Past Activity

No past activity. Past meetings and tasks marked as done

The contract is now activated.

The screenshot shows the contract management interface for contract 00000229. The status is now 'Activated', which is highlighted with a green box. The progression bar shows 'Activated' as the current status. The details and activity sections are identical to the previous screenshot.

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">FCS Wahroonga</a>	<b>Activated</b>	1/06/2018	31/05/2019	12

Progression: ✓ ✓ ✓ Activated Deactivation in Pr... Deactivated ✓ Mark Status as Complete

**DETAILS** RELATED

Contract Owner: [OPS Finance Manager](#)  
Status: **Activated**  
Account Name: [FCS Wahroonga](#)  
Type Of Agreement: **Initial**  
Contract Start Date: **1/06/2018**  
Contract Term (months): **12**  
Contract End Date: **31/05/2019**  
Unexpired Contract Months: **12**

Contract Number: **00000229**  
Contract Version Number:  
Territory: [Territory - Wahroonga](#)  
Master Franchise Profile: [FCS NSW](#)  
Purchase History: [PH-000034](#)  
Previous Contract:  
Number Of Further Terms: **5 (Five)**  
Further Term Duration (months): **12**

**ACTIVITY** CHATTER

**Log a Call** New Event New Task More

Create new...

Activity Timeline

Next Steps

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

Past Activity

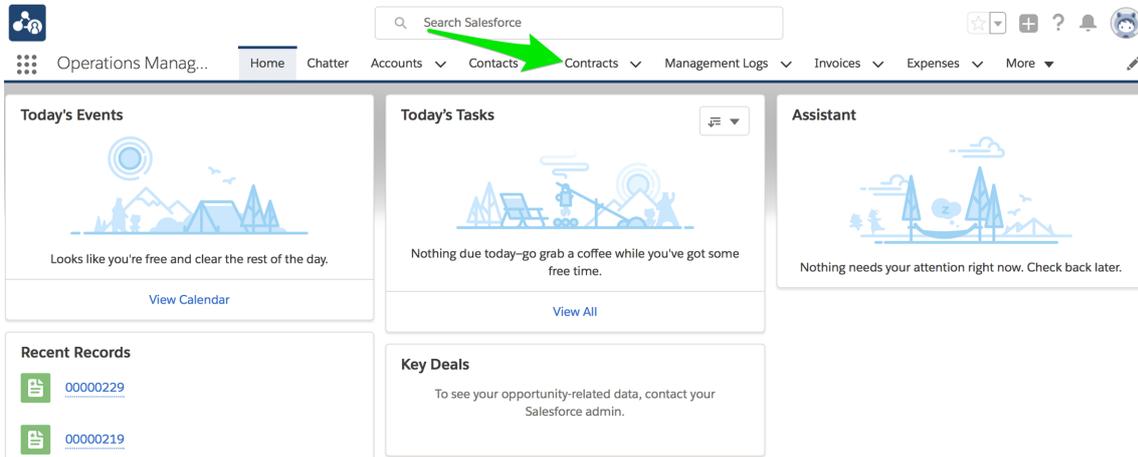
No past activity. Past meetings and tasks marked as done

# 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.

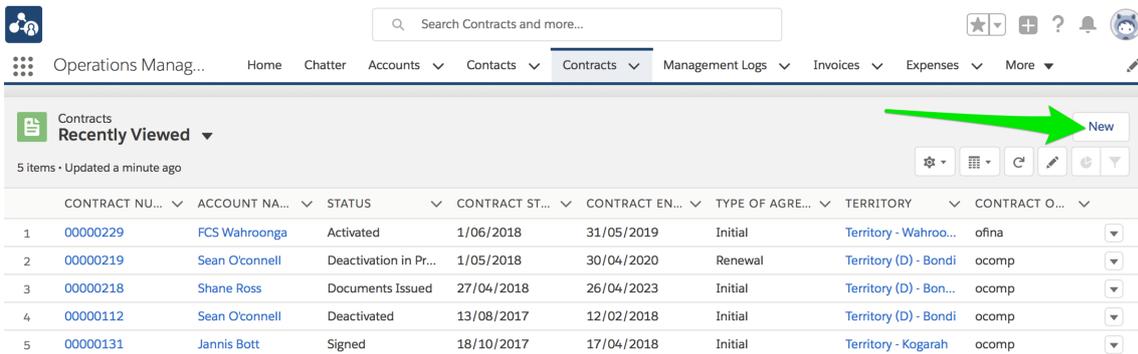
## To create a contract

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



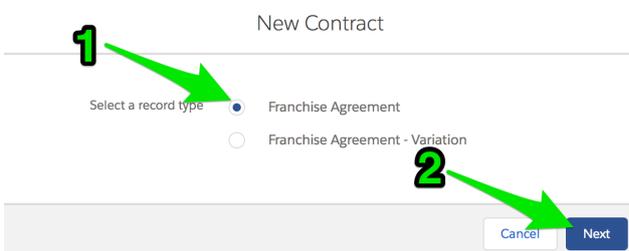
The **Recently Viewed** list view displays. This list may be empty.

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**.

New Contract: Franchise Agreement

**Contract Information**

Contract Owner OPS Compliance Manager	Contract Number
Contract Name <b>Mandy Martin - FCS Manly</b>	Contract Version Number ⓘ <input type="text"/>
* Status Draft ▼	Territory ⓘ <b>Territory - Manly</b> ×
* Account Name Search Accounts... 🔍	Master Franchise Profile ⓘ Search Accounts... 🔍
* Type Of Agreement ⓘ --None-- ▼	* Number Of Further Terms ⓘ --None-- ▼
* Contract Start Date <input type="text"/> 📅	Further Term Duration (months) ⓘ <input type="text"/>
Commencement Date ⓘ <input type="text"/> 📅	
* Contract Term (months) <input type="text"/>	

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.

### New Contract: Franchise Agreement

**Contract Information**

Contract Owner  
OPS Compliance Manager

Contract Name  
Mandy Martin - FCS Manly

\* Status  
Draft

\* Account Name  
Search Accounts...  
FCS Ringwood  
VIC Master  
Dianna Ross  
SA Master  
NSW Master  
+ New Account

Contract Number

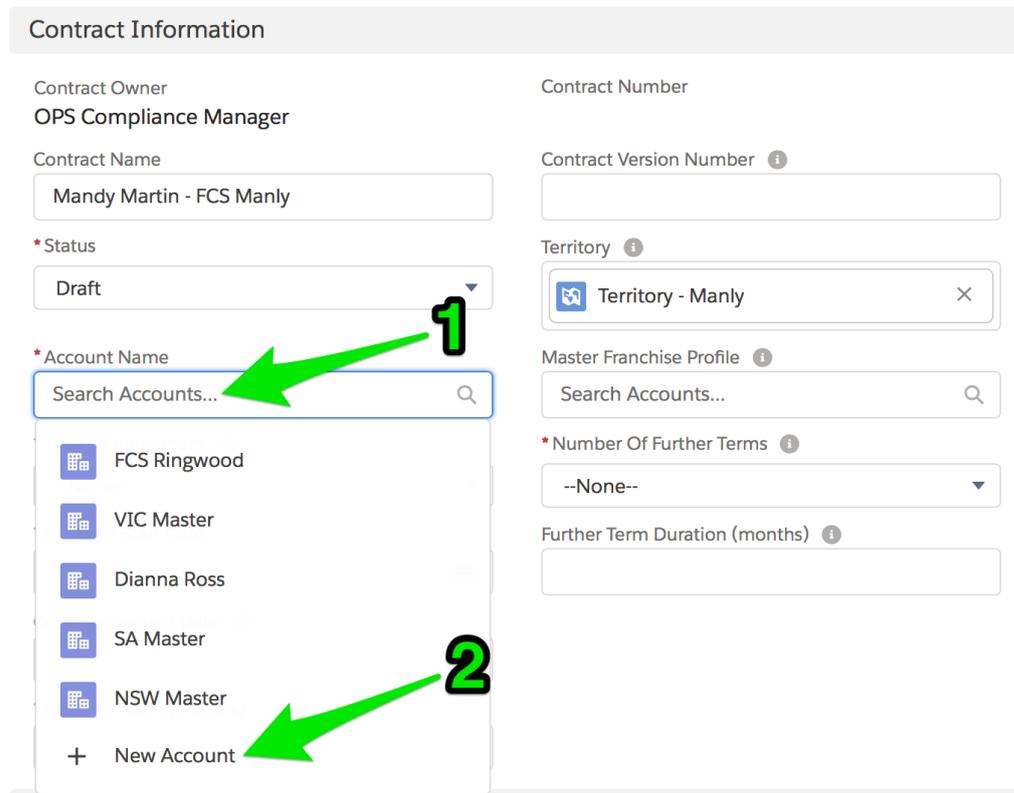
Contract Version Number ⓘ

Territory ⓘ  
Territory - Manly

Master Franchise Profile ⓘ  
Search Accounts...

\* Number Of Further Terms ⓘ  
--None--

Further Term Duration (months) ⓘ



The **New Account** dialog appears.

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

New Account

Select a record type

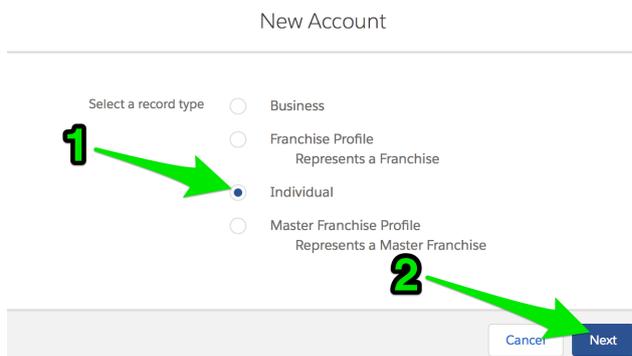
Business

Franchise Profile  
Represents a Franchise

Individual

Master Franchise Profile  
Represents a Master Franchise

Cancel Next



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

New Account: Individual

Account Information **1**

* Account Name	Account Owner
Salutation Ms.	OPS Compliance Manager
First Name Mandy	
* Last Name Martin	
Title	Franchise Search Accounts... <input type="text"/>
Mobile 0439 669 128	Email <input type="text"/>
Home Phone <input type="text"/>	Phone <input type="text"/>
Birthdate <input type="text"/>	Fax <input type="text"/>
Next Review Due Date <input type="text"/>	

**2** 

Cancel Save & New **Save**

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.

New Contract: Franchise Agreement

**Contract Information**

Contract Owner OPS Compliance Manager	Contract Number
Contract Name Mandy Martin - FCS Manly	Contract Version Number
* Status Draft	Territory Territory - Manly
* Account Name Mandy Martin	Master Franchise Profile FCS NSW
* Type Of Agreement Initial	Commencement Date 1/06/2018
* Contract Start Date 31/05/2018	* Number Of Further Terms 2 (Two)
* Contract Term (months) 12	Further Term Duration (months) 24

Cancel Save & New Save

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.

The screenshot displays a CRM interface for a contract record. At the top, there is a navigation bar with 'Operations Manag...' and a search bar. The main header shows 'Contract 00000230' with buttons for '+ Follow', 'Create Franchise Profile', 'Activate', 'Edit', 'Clone', and 'Delete'. Below this is a table with contract details:

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">Mandy Martin</a>	Draft	31/05/2018	30/05/2019	12

Below the table is a progress bar with stages: Draft (selected), Documents Issued, Signed, and Activated. A 'Mark Status as Complete' button is on the right.

The main content area is split into two columns: 'DETAILS' and 'ACTIVITY'. The 'DETAILS' column is further divided into 'RELATED' and 'DETAILS' sections. The 'RELATED' section lists fields like Contract Owner (OPS Compliance Manager), Contract Name (Mandy Martin - FCS Manly), Status (Draft), Account Name (Mandy Martin), Type Of Agreement (Initial), Contract Start Date (31/05/2018), Contract Term (months) (12), and Contract End Date (30/05/2019). The 'DETAILS' section lists fields like Contract Number (00000230), Contract Version Number, Unexpired Contract Months (12), Territory (Territory - Manly), Master Franchise Profile, Commencement Date (1/06/2018), Number Of Further Terms (2 (Two)), and Further Term Duration (months) (24).

The 'ACTIVITY' column has tabs for 'ACTIVITY' and 'CHATTER'. It includes a 'Log a Call' button, a 'Create new...' input field with an 'Add' button, and sections for 'Activity Timeline', 'Next Steps', and 'Past Activity'. The 'Next Steps' section shows 'No next steps. To get things moving, add a task or set up a meeting.' and the 'Past Activity' section shows 'No past activity. Past meetings and tasks marked as done above here.'

# 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

The screenshot shows a web interface for a fee record. At the top, there is a header with a document icon, the text 'Fee Fee-000024', and three buttons: 'Edit', 'Delete', and 'Clone Fee'. Below this is a 'DETAILS' section. The 'DETAILS' section is divided into two columns. The left column contains: 'Fee Number' (Fee-000024), 'Summary' (System Royalty), 'Type' (Management Fee), 'Start Date' (1/08/2018), 'End Date', and 'Description' (Royalty for franchisor landmark, systems and knowledge of production). The right column contains: 'Contract' (0000108), 'Cycle' (Monthly), 'Reason For Change', and 'Last Invoiced' (28/08/2018). Below the details is a 'Fee Calculation' section, which is expanded to show: 'Calculation Type' (Royalty), 'Amount Inc Tax', 'Quantity', 'Royalty Source' (Invoice), and 'Royalty Rate' (3.00%).

**Fee period**

**Fee calculation**

## 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.

 Fee **Fee-000024** Edit Delete Clone Fee

---

**DETAILS**

---

Fee Number <b>Fee-000024</b>	Contract ⓘ <a href="#">0000108</a>
Summary ⓘ <b>System Royalty</b>	Cycle ⓘ <b>Monthly</b>
Type ⓘ <b>Management Fee</b>	Reason For Change ⓘ
<b>Start Date</b> ⓘ <b>1/08/2018</b>	Last Invoiced ⓘ <b>28/08/2018</b>
End Date ⓘ	

Description ⓘ  
Royalty for franchisor brandmark, systems and knowledge of production.

▼ Fee Calculation

Calculation Type ⓘ <b>Royalty</b>	Royalty Source ⓘ <b>Invoice</b>
Amount Inc Tax ⓘ	Royalty Rate ⓘ <b>3.00%</b>
Quantity ⓘ	



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.

 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	Royalty Source ⓘ Invoice
Amount Inc Tax ⓘ	Royalty Rate ⓘ 3.00%
Quantity ⓘ	

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.

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	Royalty Source Invoice
Amount Inc Tax	Royalty Rate 3.00%
Quantity	

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.

Fee  
Fee-000023
Edit Delete Clone Fee

---

**DETAILS**

Fee Number Fee-000023	Contract <span style="font-size: 0.8em;"> ⓘ</span> <a href="#">0000108</a>
Summary <span style="font-size: 0.8em;"> ⓘ</span> Management Fees	Cycle <span style="font-size: 0.8em;"> ⓘ</span> Monthly
Type <span style="font-size: 0.8em;"> ⓘ</span> Management Fee	Reason For Change <span style="font-size: 0.8em;"> ⓘ</span>
Start Date <span style="font-size: 0.8em;"> ⓘ</span> 1/08/2018	Last Invoiced <span style="font-size: 0.8em;"> ⓘ</span> 28/08/2018
End Date <span style="font-size: 0.8em;"> ⓘ</span>	
Description <span style="font-size: 0.8em;"> ⓘ</span>	

▼ Fee Calculation

Calculation Type <span style="font-size: 0.8em;"> ⓘ</span> Fixed	Royalty Source <span style="font-size: 0.8em;"> ⓘ</span>
Amount Inc Tax <span style="font-size: 0.8em;"> ⓘ</span> AUD 1,002.00	Royalty Rate <span style="font-size: 0.8em;"> ⓘ</span>
Quantity <span style="font-size: 0.8em;"> ⓘ</span> 1	

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.

**DETAILS**

Fee Number <b>Fee-000024</b>	Contract ⓘ <a href="#">0000108</a>
Summary ⓘ <b>System Royalty</b>	Cycle ⓘ <b>Monthly</b>
Type ⓘ <b>Management Fee</b>	Reason For Change ⓘ
Start Date ⓘ <b>1/08/2018</b>	Last Invoiced ⓘ <b>28/08/2018</b>
End Date ⓘ	
Description ⓘ <b>Royalty for franchisor brandmark, systems and knowledge of production.</b>	

▼ Fee Calculation

Calculation Type ⓘ <b>Royalty</b>	Royalty Source ⓘ <b>Invoice</b>
Amount Inc Tax ⓘ	Royalty Rate ⓘ <b>3.00%</b>
Quantity ⓘ	

# 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.

The screenshot shows the 'Contract' page for ID 00000225. The 'RELATED' tab is selected, indicated by a green arrow. The page is divided into three main sections: DETAILS, ACTIVITY, and CHATTER.

**DETAILS**

Contract Owner	OPS Finance Manager	Contract Number	00000225
Status	Activated	Contract Version Number	
Account Name	FCS Maroubra	Territory	Territory (D) - Maroubra
Type Of Agreement	Initial	Master Franchise Profile	FCS NSW
Contract Start Date	1/05/2018	Purchase History	PH-000031
Contract Term (months)	24	Previous Contract	
Contract End Date	30/04/2020	Number Of Further Terms	3 (Three)
Unexpired Contract Months	24	Further Term Duration (months)	24

**ACTIVITY**

Log a Call | New Event | New Task | More

Create new... Add

Activity Timeline [Dropdown] [Refresh] Expand All

Next Steps ..... More Steps

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

Past Activity ..... More Steps

No past activity. Past meetings and tasks marked as done

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

The screenshot shows the Salesforce interface for Contract 00000225. The 'Contracts' tab is active, and the 'Fees' section is expanded. A green arrow points to the 'View All' link at the bottom of the fees list. The activity panel on the right shows 'Log a Call' and 'Next Steps'.

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
FCS Maroubra	Activated	1/05/2018	30/04/2020	24

FEE NUMBER	TYPE	CALCULATION TYPE	AMOUNT INC TAX
<a href="#">Fee-000167</a>	Subscription	Fixed	\$1.00
<a href="#">Fee-000166</a>	Subscription	Fixed	\$10.00
<a href="#">Fee-000164</a>	Management Fee	Royalty	
<a href="#">Fee-000163</a>	Management Fee	Fixed	\$1,000.00
<a href="#">Fee-000162</a>	Communications Levy	Fixed	\$45.00
<a href="#">Fee-000161</a>	Advertising Levy	Fixed	\$199.00

The Fees list appears with a summary of fee details.

The screenshot shows a detailed list of fees for Contract 00000225. The list is sorted by Fee Number and contains 7 items. The columns include Fee Number, Type, Calculation Type, Amount Inc Tax, Royalty Rate, Start Date, and End Date.

FEE NUMBER ↓	TYPE	CALCULATION TY...	AMOUNT INC TAX	ROYALTY RATE	START DATE	END DATE
1	<a href="#">Fee-000167</a>	Subscription	Fixed	\$1.00		1/01/2018
2	<a href="#">Fee-000166</a>	Subscription	Fixed	\$10.00		1/01/2018
3	<a href="#">Fee-000164</a>	Management Fee	Royalty		3.00%	1/05/2018
4	<a href="#">Fee-000163</a>	Management Fee	Fixed	\$1,000.00		1/05/2018 31/05/2018
5	<a href="#">Fee-000162</a>	Communications Levy	Fixed	\$45.00		1/05/2018
6	<a href="#">Fee-000161</a>	Advertising Levy	Fixed	\$199.00		1/05/2018
7	<a href="#">Fee-000160</a>	Software Subscription	Fixed	\$90.00		1/05/2018

## 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**.

Contracts > 00000225  
**Fees**  
7 items • Sorted by Fee Number • Updated 12 minutes ago

	FEE NUMBER ↓	TYPE	CALCULATION TY...	AMOUNT INC TAX	ROYALTY RATE	START DATE	END DATE	
1	Fee-000167	Subscription	Fixed	\$1.00		1/01/2018		▼
2	Fee-000166	Subscription	Fixed	\$10.00		1/01/2018		▼
3	Fee-000164	Management Fee	Royalty		3.00%	1/05/2018		▼
4	Fee-000163	Management Fee	Fixed	\$1,000.00		1/05/2018		▼
5	Fee-000162	Communications Levy	Fixed	\$45.00		1/05/2018		▼
6	Fee-000161	Advertising Levy	Fixed	\$199.00		1/05/2018		▼
7	Fee-000160	Software Subscription	Fixed	\$90.00		1/05/2018		▼

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

#### New Fee

### Information

Fee Number	* Contract 00000225
* Summary Software Subscription	* Cycle Monthly
* Type Software Subscription	Reason For Change Launch of new Business Management software.
* Start Date 1/01/2018	Last Invoiced
End Date	
Description World's best CRM software for franchise businesses.	

### Fee Calculation

* Calculation Type --None--	Royalty Source --None--
Amount Inc Tax	Royalty Rate
Quantity	

### System Information

Currency Australian Dollar
-------------------------------

Cancel Save & New Save



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*.

New Fee

### Information

Fee Number		* Contract	<input type="text" value="00000225"/>
* Summary	<input type="text" value="Software Subscription"/>	* Cycle	<input type="text" value="Monthly"/>
* Type	<input type="text" value="Software Subscription"/>	Reason For Change	<input type="text" value="Launch of new Business Management software."/>
* Start Date	<input type="text" value="1/01/2018"/>	Last Invoiced	<input type="text"/>
End Date	<input type="text"/>		
Description	<input type="text" value="World's best CRM software for franchise businesses."/>		

### Fee Calculation

* Calculation Type	<input type="text" value="Fixed"/>	Royalty Source	<input type="text" value="--None--"/>
Amount Inc Tax	<input type="text"/>	Royalty Rate	<input type="text"/>
Quantity	<input type="text"/>		

### System Information

Currency	<input type="text" value="Australian Dollar"/>
----------	--

## 2. Enter the value and quantity of the item.

### New Fee

#### Information

Fee Number	* Contract 00000225
* Summary Software Subscription	* Cycle Monthly
* Type Software Subscription	Reason For Change Launch of new Business Management software.
* Start Date 1/01/2018	Last Invoiced
End Date	
Description World's best CRM software for franchise businesses.	

#### Fee Calculation

* Calculation Type Fixed	Royalty Source --None--
Amount Inc Tax 90.00	Royalty Rate
Quantity 2	

#### System Information

Currency Australian Dollar
-------------------------------

Cancel Save & New Save



## 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*.

New Fee

---

### Information

Fee Number	* Contract 00000225
* Summary Management Fee	* Cycle Monthly
* Type Management Fee	Reason For Change
* Start Date 1/01/2018	Last Invoiced
End Date	
Description	

### Fee Calculation

* Calculation Type <b>Royalty</b>	Royalty Source --None--
Amount Inc Tax	Royalty Rate
Quantity	

### System Information

Currency Australian Dollar
-------------------------------

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

New Fee

**Information**

Fee Number

\*Contract  
0000225

\*Summary  
Management Fee

\*Cycle  
Monthly

\*Type  
Management Fee

Reason For Change

\*Start Date  
1/01/2018

Last Invoiced

End Date

Description

**Fee Calculation**

\*Calculation Type  
Royalty

Amount Inc Tax

Quantity

Royalty Source  
--None--  
✓ --None--  
Invoice  
POS

**System Information**

Currency  
Australian Dollar

Cancel Save & New Save

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

New Fee

**Information**

Fee Number

\* Contract  
00000225

\* Summary  
Management Fee

\* Cycle  
Monthly

\* Type  
Management Fee

Reason For Change

\* Start Date  
1/01/2018

Last Invoiced

End Date

Description

**Fee Calculation**

\* Calculation Type  
Royalty

Amount Inc Tax

Royalty Source  
Invoice

Quantity

Royalty Rate  
3.00%

**System Information**

Currency  
Australian Dollar

Cancel Save & New 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.

	FEE NUMBER ↓	TYPE	CALCULATION TY...	AMOUNT INC TAX	ROYALTY RATE	START DATE	END DATE
1	Fee-000167	Subscription	Fixed	\$1.00		1/01/2018	
2	Fee-000166	Subscription	Fixed	\$10.00		1/01/2018	
3	Fee-000164	Management Fee	Royalty		3.00%	1/05/2018	
4	Fee-000163	Management Fee	Fixed	\$1,000.00		1/05/2018	
5	Fee-000162	Communications Levy	Fixed	\$45.00		1/05/2018	
6	Fee-000161	Advertising Levy	Fixed	\$199.00		1/05/2018	
7	Fee-000160	Software Subscription	Fixed	\$90.00		1/05/2018	

The **Edit Fee** dialog box opens.

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

Edit Fee-000163

Fee Number  
**Fee-000163**

Contract  
**00000225**

\* Summary  
Management Fee

\* Cycle  
Monthly

\* Type  
Management Fee

Reason For Change

\* Start Date  
1/05/2018

Last Invoiced  
15/05/2018

End Date  
31/05/2018 **1**

Description

**Fee Calculation**

\* Calculation Type  
Fixed

Amount Inc Tax  
1,000.00

Royalty Source  
--None--

Quantity  
1

Royalty Rate

**System Information**

Created By  
OPS Finance Manager, 3/05/2018 10:36 AM

Last Modified By  
OPS Finance Manager, 8/05/2018 2:24 PM **2**

Currency  
Australian Dollar

Cancel Save & New Save

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

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

Contracts > 00000225  
**Fees**

7 items • Sorted by Fee Number • Updated an hour ago

	FEE NUMBER ↓	TYPE	CALCULATION TY...	AMOUNT INC TAX	ROYALTY RATE	START DATE	END DATE	
1	Fee-000167	Subscription	Fixed	\$1.00		1/01/2018		
2	Fee-000166	Subscription	Fixed	\$10.00		1/01/2018		
3	Fee-000164	Management Fee	Royalty		3.00%	1/05/2018		
4	Fee-000163	Management Fee	Fixed	\$1,000.00		1/05/2018	31/05/2018	
5	Fee-000162	Communications Levy	Fixed	\$45.00		1/05/2018		
6	Fee-000161	Advertising Levy	Fixed	\$199.00		1/05/2018		
7	Fee-000160	Software Subscription	Fixed	\$90.00		1/05/2018		



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 screenshot shows a web application interface for contract management. At the top, there is a navigation bar with a search box and several icons. Below the navigation bar, the main content area displays details for a contract with ID 00000228. The contract is currently in an 'Activated' state, as indicated by a blue arrow in a progress bar. A green arrow points to the 'Create Variation' button in the top right corner of the contract details section. The interface is divided into two main columns: 'DETAILS' and 'ACTIVITY'. The 'DETAILS' column contains various fields such as Contract Owner, Contract Name, Status, Account Name, Type Of Agreement, Contract Start Date, Contract Term, Contract End Date, Unexpired Contract Months, Initial Fee, Deposit Amount, Balance Amount, Contract Number, Contract Version Number, Territory, Master Franchise Profile, Purchase History, Previous Contract, Number Of Further Terms, and Further Term Duration. The 'ACTIVITY' column contains sections for 'Log a Call', 'Activity Timeline', 'Next Steps', and 'Past Activity'. The 'Log a Call' section has a 'Create new...' button and an 'Add' button. The 'Activity Timeline' section has a dropdown menu and an 'Expand All' button. The 'Next Steps' section has a 'More Steps' button. The 'Past Activity' section has a 'Load More Past Activities' button. At the bottom of the 'ACTIVITY' column, there is an 'Activity Lists' section with an 'Add List' button and a table with columns for 'NAME', 'NUMBER OF TASKS', and 'COMPLETED TASKS'.

Contract 00000228

Account Name: FCS Artarmon | Status: Activated | Contract Start Date: 1/06/2018 | Contract End Date: 31/05/2020 | Contract Term (months): 24

Contract Owner: OPS Finance Manager

Contract Name: FCS Artarmon - Territory - Artarmon

Status: Activated

Account Name: FCS Artarmon

Type Of Agreement: Initial

Contract Start Date: 1/06/2018

Contract Term (months): 24

Contract End Date: 31/05/2020

Unexpired Contract Months: 24

Initial Fee: \$50,000.00

Deposit Amount: \$5,000.00

Balance Amount: \$45,000.00

Contract Number: 00000228

Contract Version Number: [blank]

Territory: Territory - Artarmon

Master Franchise Profile: FCS NSW

Purchase History: PH-000033

Previous Contract: [blank]

Number Of Further Terms: 2 (Two)

Further Term Duration (months): 12

Personal Release Signed:

Deposit Date: 1/05/2018

Balance Due Date: 30/06/2018

Buttons: + Follow, **Create Variation**, Create Renewal, Cease Contract

Progress: Activated

Activity: Log a Call, New Event, New Task, More

Activity Lists: Add List

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

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

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

### Create A Contract Variation

\* Contract Variation  \* Effective Date

\* Reason for the Variation

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.

The screenshot shows the Salesforce interface for a Contract record. The contract is in 'Draft' status. The contract number is 00000231. The contract start date is 1/06/2018 and the end date is 31/05/2020. The contract term is 24 months. The contract owner is OPS Compliance Manager. The contract name is FCS Artarmon - Territory - Artarmon. The status is Draft. The type of agreement is Variation. The contract start date is 1/06/2018. The contract term is 24 months. The contract end date is 31/05/2020. The unexpired contract months are 24. The variation details show an effective date of 15/05/2018 and a reason for the variation of 'Modification in Initial Fee.'. The initial purchase information shows an initial fee of \$50,000.00, a deposit amount of \$5,000.00, and a balance amount of \$45,000.00. The activity timeline shows no next steps or past activity.

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
FCS Artarmon	Draft	1/06/2018	31/05/2020	24

Contract Owner	Contract Number	Contract Version Number	Territory	Master Franchise Profile	Purchase History	Previous Contract	Number Of Further Terms	Further Term Duration (months)	Unexpired Contract Months
OPS Compliance Manager	00000231	Contract087-v01	Territory - Artarmon	FCS NSW	PH-000033	00000228	2 (Two)	12	24

Effective Date	Contract Variation	Reason for the Variation
15/05/2018	Other	Modification in Initial Fee.

Initial Fee	Personal Release Signed	Deposit Amount	Deposit Date	Balance Amount	Balance Due Date
\$50,000.00	<input checked="" type="checkbox"/>	\$5,000.00	1/05/2018	\$45,000.00	30/06/2018



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 screenshot displays the 'Contract 00000131' page in the Operations Management system. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. The contract header shows the contract number '00000131' and buttons for '+ Follow', 'Create Variation', 'Create Renewal', and 'Cease Contract'. A green arrow points to the 'Create Renewal' button. Below the header, a table lists contract details: Account Name (Jannis Bott), Status (Activated), Contract Start Date (18/10/2017), Contract End Date (17/04/2018), and Contract Term (months) (6). A progress bar at the bottom indicates the contract is currently 'Activated'. The main content area is divided into 'DETAILS' and 'RELATED' sections on the left, and 'ACTIVITY' and 'CHATTER' sections on the right. The 'DETAILS' section lists fields such as Contract Owner (OPS Compliance Manager), Status (Activated), Account Name (Jannis Bott), Type Of Agreement (Initial), Contract Start Date (18/10/2017), Contract Term (months) (6), Contract End Date (17/04/2018), and Unexpired Contract Months (6). The 'RELATED' section lists Contract Number (00000131), Contract Version Number, Territory (Territory - Kogarah), Master Franchise Profile (FCS NSW), Purchase History, Previous Contract, Number Of Further Terms (3 (Three)), and Further Term Duration (months) (3). The 'ACTIVITY' section includes a 'Log a Call' button, a 'Create new...' input field, and an 'Add' button. The 'CHATTER' section shows 'Next Steps' and 'Past Activity' sections, both currently empty.

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

## 2. Press OK.

The renewal contract is displayed.

Contract **00000232**

Account Name: [Jannis Bott](#) | Status: Draft | Contract Start Date: 18/04/2018 | Contract End Date: 17/07/2018 | Contract Term (months): 3

Progress: Draft → Documents Issued → Signed → Activated → [Mark Status as Complete](#)

DETAILS	RELATED
Contract Owner <a href="#">OPS Finance Manager</a>	Contract Number <b>00000232</b>
Status <b>Draft</b>	Contract Version Number
Account Name <a href="#">Jannis Bott</a>	Territory <a href="#">Territory - Kogarah</a>
Type Of Agreement <b>Renewal</b>	Master Franchise Profile <a href="#">FCS NSW</a>
Contract Start Date <b>18/04/2018</b>	Purchase History
Contract Term (months) 3	Previous Contract <b>00000131</b>
Contract End Date <b>17/07/2018</b>	Number Of Further Terms <b>2 (Two)</b>
Unexpired Contract Months 3	Further Term Duration (months) 3

ACTIVITY | CHATTER

[Log a Call](#) | [New Event](#) | [New Task](#) | [More](#)

Create new... [Add](#)

Activity Timeline [Expand All](#)

Next Steps [More Steps](#)

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

Past Activity [More Steps](#)

No past activity. Past meetings and tasks marked as done



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 screenshot displays the 'Contract 00000232' page in the Operations Management system. At the top, there is a navigation menu with options like Home, Chatter, Accounts, Contracts, Management Logs, Invoices, and Payments. A search bar is located next to the navigation menu. Below the navigation, the contract details are shown in a table format:

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">Jannis Bott</a>	Activated	18/04/2018	17/07/2018	3

Below the table, there is a progress bar with stages: Deactivated, Deactivation in Progress, **Activated**, and Deactivation in Progress. A 'Mark Status as Complete' button is visible on the right.

The main content area is divided into two columns: 'DETAILS' and 'RELATED'. The 'DETAILS' section shows the following information:

- Contract Owner: [OPS Finance Manager](#)
- Status: **Activated**
- Account Name: [Jannis Bott](#)
- Type Of Agreement: **Renewal**
- Contract Start Date: **18/04/2018**
- Contract Term (months): **3**
- Contract End Date: **17/07/2018**
- Unexpired Contract Months: **3**
- Contract Number: **00000232**
- Contract Version Number: [blank]
- Territory: [Territory - Kogarah](#)
- Master Franchise Profile: [FCS NSW](#)
- Purchase History: [blank]
- Previous Contract: [00000131](#)
- Number Of Further Terms: **2 (Two)**
- Further Term Duration (months): **3**

The 'RELATED' section is currently empty. The 'ACTIVITY' and 'CHATTER' sections are also visible, with 'ACTIVITY' showing options like 'Log a Call', 'New Event', and 'New Task'. The 'Next Steps' section indicates 'No next steps. To get things moving, add a task or set up a meeting.' The 'Past Activity' section indicates 'No past activity. Past meetings and tasks marked as done.'



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 screenshot shows the Salesforce interface for a contract record. At the top, there is a search bar and navigation tabs including 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. The 'Contracts' tab is selected. Below the navigation, the contract details for 'Contract 00000119' are displayed. A green arrow points to the 'Cease Contract' button in the top right corner of the record header. Below the header, there is a progress bar with stages: 'Activated', 'Deactivation in Pr...', and 'Deactivated'. The 'Activated' stage is currently selected. The main content area is divided into 'DETAILS' and 'RELATED' sections. The 'DETAILS' section shows fields for Contract Owner (REC Sales Manager), Status (Activated), Account Name (Peter Stevens), Type Of Agreement (Initial), Contract Start Date (5/10/2017), Contract Term (months) (36), Contract End Date (4/10/2020), and Unexpired Contract Months (36). The 'RELATED' section shows fields for Contract Number (00000119), Contract Version Number, Territory (Territory (D) - Coogee), Master Franchise Profile (FCS NSW), Purchase History (PH-000017), Previous Contract, Number Of Further Terms (3 (Three)), and Further Term Duration (months) (12). The 'ACTIVITY' section shows a 'Log a Call' button and a 'Create new...' button. The 'CHATTER' section shows a 'More Steps' button. The bottom of the page shows a chat window with a message from 'Franchise ...' at 4:37 PM on 05/10/2017.

The **Cease Contract** dialog box appears.

## 2. Enter Cessation Reason and Cessation Date.

Cease Contract

\* Cessation Reason  
The Franchise Agreement Was Terminated By The Franchisee

\* Cessation Date  
13/05/2018

Cancel Save

The Contract is now *Deactivated*.

Search Salesforce

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

Contract 00000226 + Follow

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">FCS Coogee</a>	Deactivated	1/05/2018	30/04/2020	24

Deactivated Mark Status as Complete

DETAILS RELATED

Contract Owner  
OPS Finance Manager

Status  
Deactivated

Account Name  
[FCS Coogee](#)

Type Of Agreement  
Initial

Contract Start Date  
1/05/2018

Contract Term (months)  
24

Contract End Date  
30/04/2020

Unexpired Contract Months  
24

Contract Number  
00000226

Contract Version Number

Territory  
[Territory \(D\) - Coogee](#)

Master Franchise Profile  
[FCS NSW](#)

Purchase History  
[PH-000032](#)

Previous Contract

Number Of Further Terms  
3 (Three)

Further Term Duration (months)  
24

ACTIVITY CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

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

Past Activity

No past activity. Past meetings and tasks marked as done



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**.

The screenshot shows a contract record for 'Contract 00000207' with status 'Draft'. The interface includes a progress bar with stages: Draft, Documents Issued, Signed, and Activated. A 'Mark Status as Complete' button is visible. The 'DETAILS' section lists contract information such as owner (REC Sales Manager), territory (St Ives), and dates. On the right, the 'Drawloop' section contains a 'Select Document Package' button, which is highlighted with a green arrow. Below this is an 'ACTIVITY' section with options like 'Log a Call', 'New Event', 'New Task', and 'Email'.

One or more **Document Packages** appear.

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

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

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

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

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

The screenshot shows the Drawloop interface for a contract with ID 00000207. The contract status is 'Draft'. The 'Account Name' field is highlighted in green and contains 'Bob Smith'. The 'Contact' pane is open, showing a list of contacts: 'None', 'Bob Smith' (with email b.smith@handyway.com.au), and 'Marlene Smith'. A green arrow points from the 'Bob Smith' contact in the list to the 'Account Name' field in the contract details. The contract details include: Contract Number (00000207), Contract Version Number, Territory (Territory - St Ives), Master Franchise Profile (FCS NSW), Purchase History (PH-000027), Number Of Further Terms (1 (One)), Further Term Duration (24), Unexpired Contract Months (24), and Commencement Date (2/04/2018).

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

Drawloop

> Document Package **CONTRACT DOCUMENTS**

> Contact **BOB SMITH**

> Document Selection

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

**Next**

> Delivery Option **REQUIRED**

Run Document Package

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

Drawloop

> Document Package **CONTRACT DOCUMENTS**

> Contact **BOB SMITH**

> Document Selection **SELECTED**

> Delivery Option

- Download  
This is the test file

**Run Document Package**

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

Drawloop

> Document Package **CONTRACT DOCUMENTS**

> Contact **BOB SMITH**

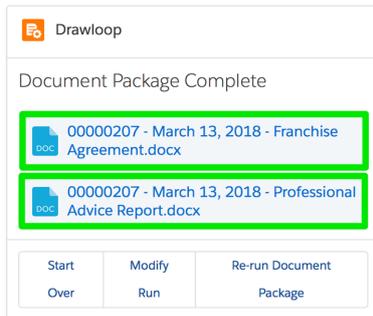
> Document Selection **SELECTED**

> Delivery Option **DOWNLOAD**

40%  
acquiring data

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

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



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

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



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

# How to issue contract documents

Contract documents can be issued via email or manually.

## To issue documents via email

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

Contract 00000207

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

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

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

**DETAILS** RELATED

Contract Owner: REC Sales Manager  
Status: Draft  
Account Name: Bob Smith  
Type Of Agreement: Initial  
Contract Start Date: 30/03/2018  
Contract Term (months): 24  
Contract End Date: 29/03/2020

Contract Number: 00000207  
Territory: Territory - St Ives  
Unexpired Contract Months: 24  
Master Franchise Profile: FCS NSW  
Number Of Further Terms: 1 (One)  
Further Term Duration (months): 24  
Commencement Date: 2/04/2018

**Drawloop**

Document Package Complete

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

Start Over Modify Run Re-run Document Package

**ACTIVITY**

An email details page appears.

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

CONTRACT 00000207

BACK TO CONTRACT

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

1. Specify the contact for the Document Package:  
Bob Smith

2. Select Optional Documents to Include:  
 Franchising Code of Conduct  
 Information Statement

Attachments:  
 00000207 - March 9, 2018 - Franchise Agreement.docx (Contract)  
 00000207 - March 9, 2018 - Professional Advice Report.docx (Contract)  
 00000207 - March 9, 2018 - Schedule 1 - All Current Franchisees.docx (Contract)  
 00000207 - March 9, 2018 - Schedule 2 - Ceased Franchisees.docx (Contract)  
 00000207 - March 9, 2018 - Document Receipt.docx (Contract)  
 00000207 - March 9, 2018 - Schedule 3 - Pre Owned Territory Letter.docx (Contract)

3. Choose a delivery method for the Document Package:  
 Email

Run Cancel

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



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

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

**TASK**  
Send an Email

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

To: Contact: Bob Smith

Related To: Contract: 00000207

Additional To:

CC:

BCC:

Subject: Franchise Agreement Documents

Body

FRANCHISE CLOUD SOLUTIONS

Dear Bob,

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

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

Thank you,

Cancel Send

Attachments

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

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

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

### To issue documents manually

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

# How to sign issued contract documents

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



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

## To sign the contract documents

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

Contract Execution

Documents Issued Date  13/03/2018

Customer Signed Date 27/03/2018 ✓

Customer Signed By Bob Smith ✓

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

Contract 0000207 + Follow Create Franchise Profile Edit Clone Delete

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

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

# 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.

Contract 00000207 + Follow Create Franchise Profile Edit Clone Delete

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

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



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



# CHAPTER 3

## Franchise Profile Accounts

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# 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 screenshot shows the 'Contract' page for ID 00000234. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. A search bar is located at the top center. Below the navigation, the contract details are displayed in a table:

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">Greg Landy</a>	Draft	1/06/2018	31/05/2019	12

Below the table, there are buttons for '+ Follow', 'Create Franchise Profile', 'Activate', 'Edit', 'Clone', and 'Delete'. A green arrow points to the 'Create Franchise Profile' button. Below the buttons, there is a progress bar with stages: 'Draft' (selected), 'Documents Issued', 'Signed', and 'Activated'. A 'Mark Status as Complete' button is also present.

The main content area is divided into 'DETAILS' and 'RELATED' sections. The 'DETAILS' section shows fields for Contract Owner (OPS Finance Manager), Status (Draft), Account Name (Greg Landy), Type Of Agreement (Initial), Contract Start Date (1/06/2018), Contract Term (months) (12), Contract End Date (31/05/2019), Contract Number (00000234), Contract Version Number, Unexpired Contract Months (12), Territory (Territory - Dee Why), Master Franchise Profile (FCS NSW), Commencement Date (1/07/2018), Number Of Further Terms (2 (Two)), and Further Term Duration (months) (24).

The 'ACTIVITY' section shows options for 'Log a Call', 'New Event', 'New Task', and 'More'. There is a 'Create new...' button and an 'Add' button. Below this, there are sections for 'Activity Timeline', 'Next Steps', and 'Past Activity', each with a 'More Steps' 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.

The screenshot shows a Salesforce interface for an account record. At the top, there is a search bar and navigation tabs for 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. The account name is 'Territory - Dee Why' and its status is 'Inactive'. The 'DETAILS' tab is active, showing fields for Account Name, Parent Account, Status, Status Reason, Inactive Reason, Field Manager, Timezone, Next Review Due Date, and Next Review Date. The 'RELATED' section shows Account Owner (OPS Finance Manager), Email, Phone, Fax, Cell Member Role, Primary Cell Group, and Secondary Cell Group. The 'ACTIVITY' tab is also visible, showing options to 'Log a Call', 'New Event', 'New Task', and 'More', along with an 'Add' button. Below the activity section, there are sections for 'Next Steps' and 'Past Activity', both indicating no activity at the moment.



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.

The screenshot shows the 'FCS Artarmon' account page. The 'RELATED' tab is active, displaying a message about duplicates and three categories: Related Contacts (1), Contracts (Franchise Profile) (0), and Territories (1). The 'Territories (1)' category contains a table with one entry highlighted in green.

TERRITORY NAME	STATUS	TERRITORY OWNER	ACTIVE
<a href="#">Territory - Artarmon</a>	Unowned	<a href="#">Hal Gregory</a>	<input checked="" type="checkbox"/>

## 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.

The screenshot shows the 'Account' page for 'FCS Artarmon'. The 'Status' is 'Inactive' and the 'Status Reason' is 'Contract Negotiation'. The 'RELATED' tab is selected, showing details for the 'Account Owner' (OPS Finance Manager) with contact information: Email (jill.kennedy@gmail.com), Phone (0431 668 997), and Fax. The 'ACTIVITY' and 'CHATTER' tabs are also visible on the right side of the interface.

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

The screenshot shows the 'Operations Management' interface. At the top, there is a search bar and navigation tabs for 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. The main content area is for account 'FCS Artarmon', which is currently 'Inactive'. Below this, there are tabs for 'DETAILS' and 'RELATED'. The 'RELATED' tab is active, showing a message: 'We found no potential duplicates of this account.' Below this message, there are several sections: 'Related Contacts (0)' with a 'New Contact' button (highlighted by a green arrow) and an 'Add Relationship' button; 'Contracts (Franchise Profile) (0)' with a 'New' button; 'Territories (0)' with a 'New' button; 'Management Logs (0)' with a 'New' button; and 'Invoices (0)' with a 'New' button. To the right, there are tabs for 'ACTIVITY' and 'CHATTER'. The 'ACTIVITY' tab is active, showing options for 'Log a Call', 'New Event', 'New Task', and 'More'. There is a 'Create new...' input field and an 'Add' button. Below this, there are sections for 'Activity Timeline', 'Next Steps', and 'Past Activity', each with a 'More' button.

The **New Contact** dialog box appears.

The 'New Contact' dialog box is shown. It has a title bar 'New Contact'. Below the title bar, there is a section 'Select a record type' with two radio button options: 'Franchise Contact' (with the subtext 'Contact type for franchise contacts') and 'Contact' (with the subtext 'Contact type for general contacts'). The 'Contact' option is selected. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Next'.

## 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**.

New Contact: Contact

### Contact Information

* Name	Contact Owner
Salutation	OPS Finance Manager
Mr.	
First Name	
Hal	
* Last Name	
Gregory	
Account Name	Phone
FCS Artarmon	0431 668 997
Title	Home Phone
	02 8809 7642
Reports To	Mobile
Search Contacts...	0431 668 997
Department	Fax
Birthdate	Email

### Address Information

Mailing Address	Other Address
Mailing Street	Other Street
96 Burns Road	
Mailing Suburb	Other Suburb
Wahroonga	
Mailing State	Other State
NSW	
Mailing Postcode	Other Postcode
2076	
Mailing Country	Other Country
Australia	

### Marketing Information

Preferred Communication Channel	Unsubscribe
Email	<input type="checkbox"/>
	SMS Unsubscribe ⓘ
	<input type="checkbox"/>

Cancel Save & New Save

The new contact is now added to the account.

Account: FCS Artarmon

Status: Inactive

DETAILS RELATED

We found no potential duplicates of this account.

Related Contacts (1)

- Hal Gregory  
Account N...: FCS Artarmon  
Title:  
Email:

Contracts (Franchise Profile) (0)

Territories (0)

ACTIVITY CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

Past Activity Load More Past Activities

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**.

Territory - St Ives

Related Contacts (2)

- Bob Smith  
Account N...: Territory - St Ives  
Title:  
Email: b.smith@handyway.com.au
- Marlene Smith  
Account N...: Territory - St Ives

View Relationship

The Account Contact Relationship page displays.

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

The screenshot shows the Salesforce interface for editing an Account Contact Relationship. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. The main header displays 'Account Contact Relationship' for 'Bob Smith' with an 'Edit Relationship' button. The account is identified as 'Territory - St Ives'. The 'DETAILS' section is expanded to show 'Account Contact Relationship Information'. The 'Roles' dropdown menu is open, listing 'Technical Buyer', 'Other', 'Franchise Owner' (highlighted), and 'Franchisee Employee'. A green arrow labeled '1' points to the dropdown menu. Below the roles, the 'System Information' section shows 'Created By' and 'Last Modified By' as 'REC Sales Manager, 14/03/2018 10:57 AM'. At the bottom, there are 'Cancel' and 'Save' buttons. A green arrow labeled '2' points to the 'Save' button.

# 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

Account Information	
* Account Name	Account Owner OPS Finance Manager
Parent Account Search Accounts...	Email
Status --None--	Phone
Status Reason --None--	Fax
Inactive Reason	Cell Member Role --None--
Field Manager Search People...	Primary Cell Group --None--
Timezone Search Timezones...	Secondary Cell Group --None--
Next Review Due Date	
Next Review Date	
Date	Time
Business Information	
Legal Entity Name	Business Number
Trading Name	Company Number
Operating Structure	

### Address Information

Billing Address		Shipping Address	
Billing Street		Shipping Street	
<input type="text"/>		<input type="text"/>	
Billing Suburb	Billing State	Shipping Suburb	Shipping State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Billing Postcode	Billing Country	Shipping Postcode	Shipping Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Invoice Summary Information

<input type="checkbox"/> Tax Exempt	<input type="checkbox"/> Has Overdue Balance
Total Invoice Amount ⓘ	Overdue Balance
Amount Paid ⓘ	Debtors 0-15 days
Amount Outstanding ⓘ	Debtors 16-30 days
Credit Balance ⓘ	Debtors 31-45 days
	Debtors 46+ days

#### Accounts Receivable Notes

### Quote & Invoice Information

Payment Terms	Accounting Sequence Name
<input type="text" value="On Completion"/>	<input type="text"/>
Default Tax Rate	Default Markup %
<input type="text"/>	<input type="text"/>
	Default Hourly Rate
	<input type="text"/>

### Payment Method Information

<input type="checkbox"/> Cash	Bank Account Name
<input type="checkbox"/> Cheque	<input type="text"/>
<input type="checkbox"/> Credit Card	Bank Account BSB
<input type="checkbox"/> Direct Deposit	<input type="text"/>
<input type="checkbox"/> Eftpos	Bank Account Number
	<input type="text"/>
	Paypal
	<input type="checkbox"/>
	Paypal Email
	<input type="text"/>

### Job Allocation Information

No Timeout

Unavailable

Off System

Notification Preference

--None--

Notification SMS

Max Travel Distance

Unavailable From

Unavailable To

Unavailable Redirect

Search Accounts...

Territory Only

Territory Only Start Date

Territory Only End Date

### Location Information

State

### Job Offer Information

Daily Offer Target

Current # Daily Offers

Weekly Offer Target

Current # Weekly Offers

Last Job Offer Date

Last Job Date

### Financial Information

Break Even Point Target

Profit Allowance Target

Gross Profit 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

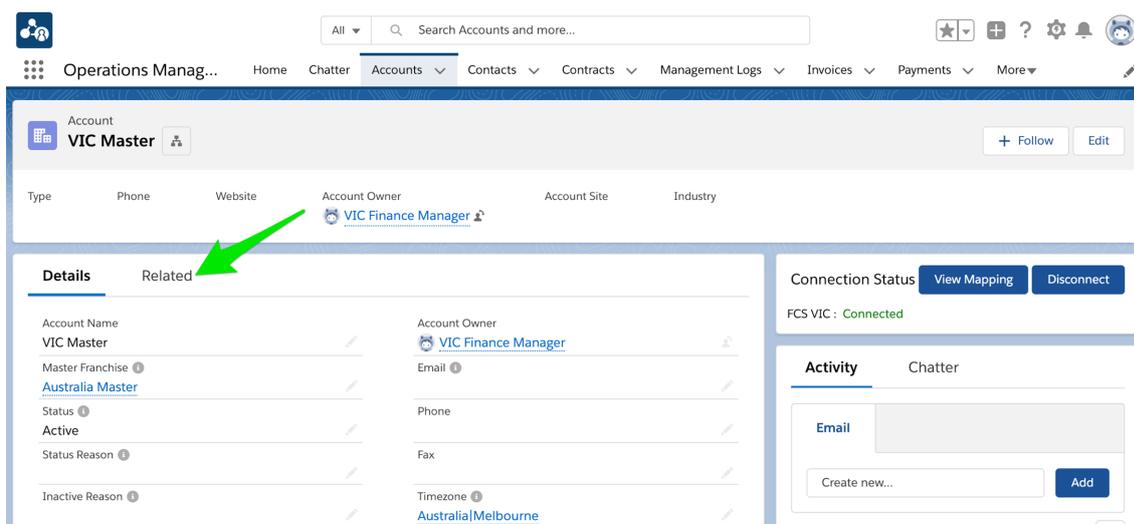
Configure the Franchise Profile Account with appropriate settings, based on your licensing options and the size and nature of the territory. See “How to configure a franchise profile for job allocation” on page 103.

## How to add a company asset

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

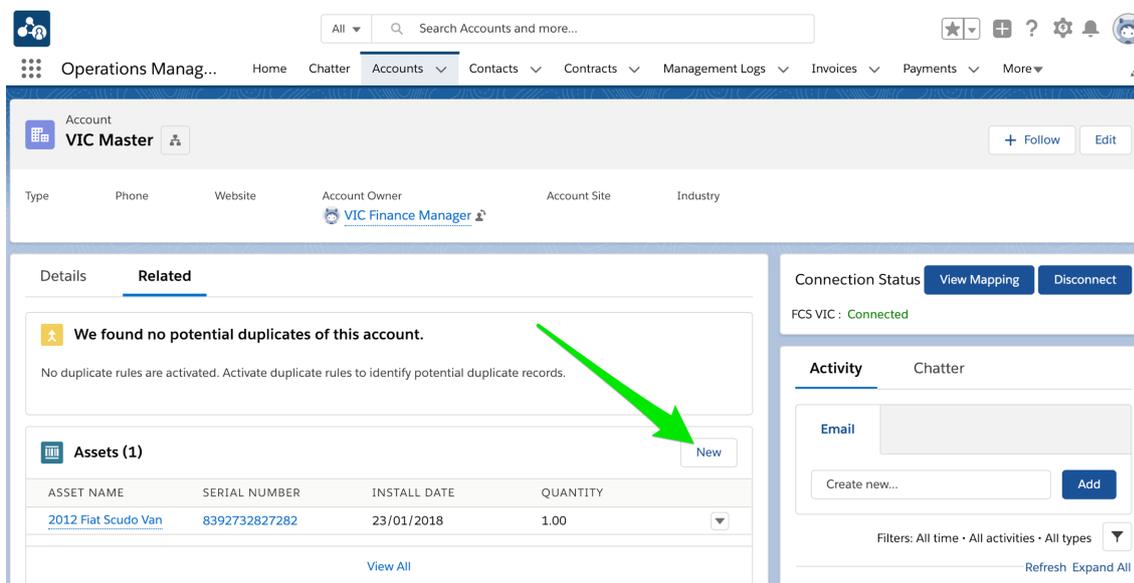
### To add an asset to the register

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



The screenshot shows the 'VIC Master' account page in the 'Operations Manager' system. The 'Related' tab is highlighted with a green arrow. The page displays account details such as 'Account Name: VIC Master', 'Master Franchise: Australia Master', and 'Status: Active'. The 'Account Owner' is listed as 'VIC Finance Manager'. The 'Connection Status' is 'Connected'. The 'Activity' section shows an email input field and an 'Add' button.

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



The screenshot shows the 'VIC Master' account page with the 'Related' tab selected. A green arrow points to the 'New' button in the 'Assets Register' section. The 'Assets Register' section displays a message: 'We found no potential duplicates of this account. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.' Below this, there is a table with one asset listed: '2012 Fiat Scudo Van' with serial number '8392732827282', install date '23/01/2018', and quantity '1.00'. The 'New' button is located to the right of the table.

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

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

New Asset Register

**Information**

\* Asset Name:  Currency:

Asset Number:

Make Model ⓘ:

Serial Number:

Purchase Date:

Warranty Expiry:

Purchased From:

Asset Details ⓘ:

Purchase Price:

Reminder Date ⓘ:

Status:

\* Account:



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

Account  
**VIC Master**

Type Phone Website Account Owner Account Site Industry  
VIC Finance Manager

Details **Related**

We found no potential duplicates of this account.  
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

**Assets (2)** New

ASSET NAME	SERIAL NUMBER	INSTALL DATE	QUANTITY
Jim's Mobile Phone	C39SK9Z3BFYE	20/12/2018	1.00
2012 Fiat Scudo Van	8392732827282	23/01/2018	1.00

[View All](#)

Connection Status View Mapping Disconnect  
FCS VIC: **Connected**

**Activity** Chatter

Email   
 Create new... Add

Filters: All time · All activities · All types ▼  
[Refresh](#) [Expand All](#)

Next Steps More Steps



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**.

New Insurance Policy

---

**Information**

*Insurance Policy Name Workers Compensation	Currency AUD - Australian Dollar
Insurer CGU	Type Public Liability
Status Active	Compulsory <input checked="" type="checkbox"/>
*Account FCS Ringwood	Expiration Date 15/05/2019



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*.

The screenshot shows the Franchise Profile Account page for FCS Artarmon. The account status is highlighted as **Active**. The page is divided into several sections:

- Account Information:** Billing Address, Status (Active), Status Reason.
- DETAILS:** Account Name (FCS Artarmon), Parent Account, Status (Active), Status Reason, Inactive Reason, Field Manager, Timezone (Australia/Sydney GMT+1000), Next Review Due Date, Next Review Date.
- RELATED:** Account Owner (OPS Finance Manager), Email (jill.kennedy@gmail.com), Phone (0431 668 997), Fax, Cell Member Role, Primary Cell Group, Secondary Cell Group.
- ACTIVITY:** Log a Call, New Event, New Task, More. Activity Timeline, Next Steps, Past Activity.

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

The screenshot shows the Franchise Profile Account page for FCS Artarmon, focusing on the Job Allocation Information section. The section is expanded to show the following details:

- Job Allocation Information:**
  - No Timeout:
  - Unavailable:
  - Off System:
  - Notification Preference: 2-Way SMS & Email
  - Notification SMS: 0431 668 997
  - Max Travel Distance: 10
  - Unavailable From: [Field]
  - Unavailable To: [Field]
  - Unavailable Redirect: [Field]
  - Territory Only:
  - Territory Only Start Date: [Field]
  - Territory Only End Date: [Field]
- Job Offer Information:**
  - Daily Offer Target: 3
  - Current # Daily Offers: [Field]
  - Daily Offer Variance: 3.00
  - Daily Offer Variance Flag:
  - Days Since Last Job Offer: [Field]
  - Weekly Offer Target: 12
  - Current # Weekly Offers: [Field]
  - Weekly Offer Variance: 12.00
  - Last Job Offer Date: [Field]
  - Last Job Date: [Field]

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

Search Salesforce

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

00000228 + Follow Create Franchise Profile Activate Edit Email Contract Clone

**Initial Purchase Information**

Initial Fee	\$50,000.00	Personal Release Signed	<input checked="" type="checkbox"/>
Deposit Amount	\$5,000.00	Deposit Date	1/05/2018
Balance Amount	\$45,000.00	Balance Due Date	30/06/2018

**Compliance Information**

Legal Entity Name		Business Number	
Trading Name		Company Number	
Operating Structure			

**Contract Execution**

Documents Issued Date	1/05/2018	Customer Signed Date	18/05/2018
		Customer Signed By	Hal Gregory

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

Activity Lists Add List

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

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

Search Salesforce

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

Contract 00000228 + Follow Create Franchise Profile Activate Edit Email Contract Clone

Account Name	FCS Artarmon	Status	Documents Issued	Contract Start Date	1/06/2018	Contract End Date	31/05/2020	Contract Term (months)	24
--------------	--------------	--------	------------------	---------------------	-----------	-------------------	------------	------------------------	----

Documents Issued Signed Activated Mark Status as Complete

**DETAILS** RELATED

Contract Owner	OPS Finance Manager	Contract Number	00000228
Status	Documents Issued	Territory	Territory - Artarmon
Account Name	FCS Artarmon	Unexpired Contract Months	24
Type Of Agreement	Initial	Master Franchise Profile	FCS NSW
Contract Start Date	1/06/2018	Number Of Further Terms	2 (Two)
Contract Term (months)	24	Further Term Duration (months)	12
Contract End Date	31/05/2020	Commencement Date	1/07/2018

**ACTIVITY** CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

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

Past Activity

## 5. The Contract has been Activated.

The screenshot shows the Salesforce interface for Contract 00000228. The status is 'Activated', which is highlighted with a green box. The contract start date is 1/06/2018 and the end date is 31/05/2020. The account name is FCS Artarmon. The contract owner is OPS Finance Manager, also highlighted with a green box. The contract number is 00000228. The contract version number is blank. The territory is Territory - Artarmon. The master franchise profile is FCS NSW. The purchase history is PH-000033. The previous contract is blank. The number of further terms is 2 (Two). The further term duration is 12 months. The unexpired contract months are 24. The activity timeline shows no next steps and no past activity.

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

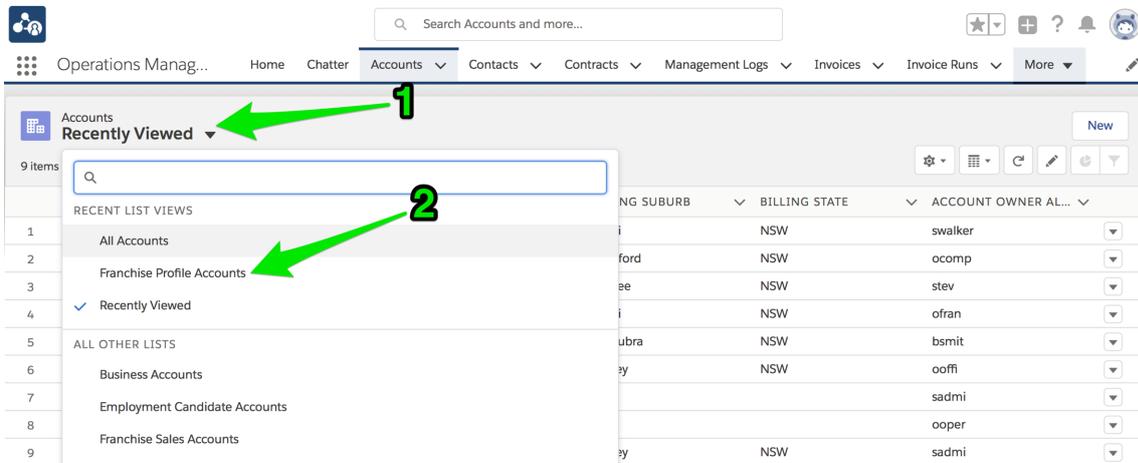
The screenshot shows the Salesforce interface for the Fees list of Contract 00000228. There are three items listed, sorted by Fee Number. The start dates for all three fees are 1/07/2018, which is highlighted with a green box. The fees are:

FEE NUMBER	TYPE	CALCULATION TY...	AMOUNT INC TAX	ROYALTY RATE	START DATE	END DATE
1 Fee-000182	Management Fee	Royalty		3.00%	1/07/2018	
2 Fee-000181	Software Subscription	Fixed	\$90.00		1/07/2018	
3 Fee-000180	Management Fee	Fixed	\$1,000.00		1/07/2018	

# How to find contract fees for a franchise

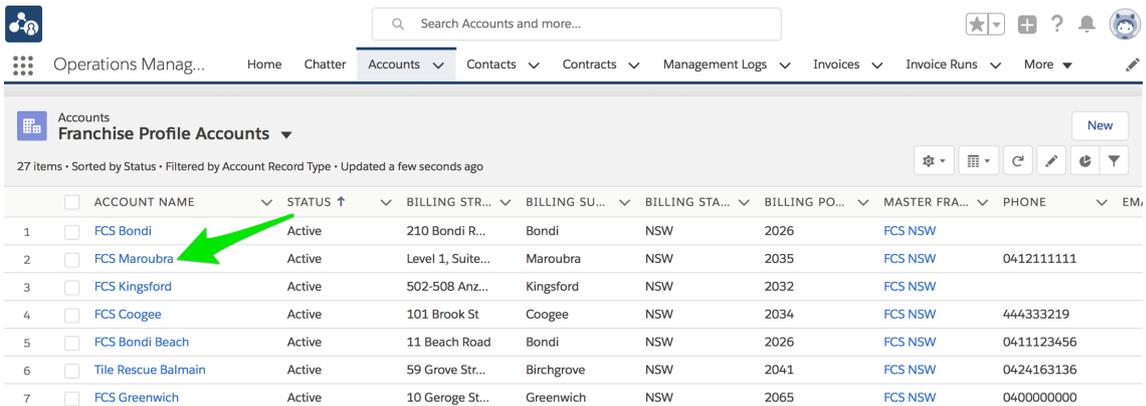
To view all fees on a contract

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



The screenshot shows the 'Accounts' page in a software application. The 'Accounts' menu is open, and the 'Recently Viewed' dropdown is active. A green arrow labeled '1' points to the 'Accounts' menu, and another green arrow labeled '2' points to the 'Franchise Profile Accounts' option in the dropdown. The background shows a table of accounts with columns for Billing Suburb, Billing State, and Account Owner.

2. Select the relevant account.



The screenshot shows the 'Accounts' page with the 'Franchise Profile Accounts' list view selected. A green arrow points to the 'FCS Maroubra' account in the list. The table displays account details including name, status, billing suburb, billing state, and phone number.

	ACCOUNT NAME	STATUS	BILLING STR...	BILLING SU...	BILLING STA...	BILLING PO...	MASTER FRA...	PHONE	EM...
1	<input type="checkbox"/> FCS Bondi	Active	210 Bondi R...	Bondi	NSW	2026	FCS NSW		
2	<input type="checkbox"/> FCS Maroubra	Active	Level 1, Suite...	Maroubra	NSW	2035	FCS NSW	0412111111	
3	<input type="checkbox"/> FCS Kingsford	Active	502-508 Anz...	Kingsford	NSW	2032	FCS NSW		
4	<input type="checkbox"/> FCS Coogee	Active	101 Brook St	Coogee	NSW	2034	FCS NSW	444333219	
5	<input type="checkbox"/> FCS Bondi Beach	Active	11 Beach Road	Bondi	NSW	2026	FCS NSW	0411123456	
6	<input type="checkbox"/> Tile Rescue Balmain	Active	59 Grove Str...	Birchgrove	NSW	2041	FCS NSW	0424163136	
7	<input type="checkbox"/> FCS Greenwich	Active	10 Geroge St...	Greenwich	NSW	2065	FCS NSW	0400000000	

3. From the Account, select the Related tab.

The screenshot shows the 'FCS Maroubra' account page. The 'RELATED' tab is selected, indicated by a green arrow. The page displays account details such as Billing Address, Status (Active), and Account Owner (Bill Smith). The 'ACTIVITY' section on the right shows options to log a call, create new events, and view activity timelines.

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

The screenshot shows the 'FCS Maroubra' account page with the 'RELATED' tab selected. The 'Contracts (Franchise Profile) (1)' section is visible, containing a single contract entry with ID 00000225, which has a status of 'Activated'. A green arrow points to this contract entry. The 'ACTIVITY' section on the right shows options to log a call, create new events, and view activity timelines.

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

Contract 00000225

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
FCS Maroubra	Activated	1/05/2018	30/04/2020	24

Activated Deactivation in Pr... Deactivated Mark Status as Complete

**DETAILS** RELATED

**1**

Contract Owner OPS Finance Manager	Contract Number 00000225
Status Activated	Contract Version Number
Account Name FCS Maroubra	Territory Territory (D) - Maroubra
Type Of Agreement Initial	Master Franchise Profile FCS NSW
Contract Start Date 1/05/2018	Purchase History PH-000031
Contract Term (months) 24	Previous Contract
Contract End Date 30/04/2020	Number Of Further Terms 3 (Three)
Unexpired Contract Months 24	Further Term Duration (months) 24

Initial Purchase Information

Initial Fee \$50,000.00	Personal Release Signed <input checked="" type="checkbox"/>
Deposit Amount \$5,000.00	Deposit Date 1/04/2018
Balance Amount \$45,000.00	Balance Due Date 30/04/2018

**ACTIVITY** CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

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

Past Activity

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

Load More Past Activities

Activity Lists Add List

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

6. From the Fees section, press View All.

The screenshot shows the Salesforce interface for a contract. At the top, there is a search bar and navigation tabs including 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', and 'Invoice Runs'. The 'Contracts' tab is selected, showing contract details for 'Contract 00000225' with account 'FCS Maroubra'. Below the contract details is a progress bar with stages: 'Activated', 'Deactivation in Pr...', and 'Deactivated'. The 'Activated' stage is currently selected. On the right, there are buttons for '+ Follow', 'Create Variation', 'Create Renewal', and 'Cease Contract'. The main content area is divided into 'DETAILS' and 'RELATED' sections. The 'RELATED' section contains a 'Fees (6+)' table with columns for 'FEE NUMBER', 'TYPE', 'CALCULATION TYPE', and 'AMOUNT INC TAX'. A green arrow points to the 'View All' link at the bottom of the table. To the right of the table is an 'ACTIVITY' section with options for 'Log a Call', 'New Event', 'New Task', and 'More', along with a 'Create new...' button and an 'Add' button. Below this are sections for 'Activity Timeline', 'Next Steps', and 'Past Activity'.

FEE NUMBER	TYPE	CALCULATION TYPE	AMOUNT INC TAX
<a href="#">Fee-000167</a>	Subscription	Fixed	\$1.00
<a href="#">Fee-000166</a>	Subscription	Fixed	\$10.00
<a href="#">Fee-000164</a>	Management Fee	Royalty	
<a href="#">Fee-000163</a>	Management Fee	Fixed	\$1,000.00
<a href="#">Fee-000162</a>	Communications Levy	Fixed	\$45.00
<a href="#">Fee-000161</a>	Advertising Levy	Fixed	\$199.00

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 screenshot shows the 'Franchise Profile Account' for 'FCS Coogee'. The account is currently 'Active'. The 'RELATED' tab is selected, showing a list of 'Contracts (Franchise Profile) (1)'. The first contract is highlighted with a green arrow and the number '2'. The contract details are: Account No. 00000226, Status: Activated, Contract Sta. 1/05/2018. A green arrow and the number '1' point to the 'RELATED' tab.

The **Contract** appears.

2. Cease the contract. See “How to cease a contract” on page 63.

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

Contract 00000226

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
<a href="#">FCS Coogee</a>	Deactivated	1/05/2018	30/04/2020	24

Deactivated | Mark Status as Complete

**DETAILS** RELATED

Contract Owner <a href="#">OPS Finance Manager</a>	Contract Number 00000226
Status Deactivated	Contract Version Number
Account Name <a href="#">FCS Coogee</a>	Territory <a href="#">Territory (D) - Coogee</a>
Type Of Agreement Initial	Master Franchise Profile <a href="#">FCS NSW</a>
Contract Start Date 1/05/2018	Purchase History <a href="#">PH-000032</a>
Contract Term (months) 24	Previous Contract
Contract End Date 30/04/2020	Number Of Further Terms 3 (Three)
Unexpired Contract Months 24	Further Term Duration (months) 24

**ACTIVITY** CHATTER

Log a Call | New Event | New Task | More

Create new... Add

Activity Timeline | Expand All

Next Steps | More Steps

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

Past Activity | More Steps

No past activity. Past meetings and tasks marked as done

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

Account FCS Coogee

Billing Address	Status	Status Reason
101 Brook St Coogee NSW 2034 Australia	Inactive	

**DETAILS** RELATED

Account Name FCS Coogee	Account Owner <a href="#">Peter Stevens</a>
Parent Account	Email
Status Inactive	Phone 444333219
Status Reason	Fax
Inactive Reason	Cell Member Role
Field Manager	Primary Cell Group
Timezone	Secondary Cell Group
Next Review Due Date	
Next Review Date	

**ACTIVITY** CHATTER

Log a Call | New Event | New Task | More

Create new... Add

Activity Timeline | Expand All

Next Steps | More Steps

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

Past Activity | More Steps

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

Load More Past Activities

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*.

The screenshot shows a software interface for account management. At the top, there is a navigation bar with 'Operations Manag...' and a search bar. Below this, the account details for 'FCS Bondi Beach' are displayed. The 'Status' is 'Active', which is highlighted with a green box. The 'Status Reason' is empty. The 'Account Owner' is 'Simon Walker'. The 'Email' is 'loryn.jenkins@franchisecloudsolutions.com'. The 'Phone' is '0411123456'. The 'Field Manager' is 'OPS Field Manager'. The 'Timezone' is 'Australia/Sydney GMT+1000'. The 'Next Review Due Date' is '23/03/2018 12:00 PM'. The 'ACTIVITY' tab is selected, showing a 'Log a Call' button and a 'Create new...' button. The 'Next Steps' section shows 'No next steps. To get things moving, add a task or set up a meeting.' The 'Past Activity' section shows an email from 'OPS Finance Manager' to 'Simon Walker' at 7:44 AM on 18/05.

## 2. The Franchise Profile Account must have a valid Timezone.

The screenshot shows the 'Account' page for 'FCS Bondi Beach'. The 'DETAILS' tab is active, displaying various account information. The 'Timezone' field is highlighted with a green box and contains the text 'Australia/Sydney GMT+1000'. Other fields include 'Account Name', 'Parent Account', 'Status', 'Status Reason', 'Inactive Reason', 'Field Manager', 'Next Review Due Date', 'Account Owner', 'Email', 'Phone', 'Fax', 'Cell Member Role', 'Primary Cell Group', and 'Secondary Cell Group'. The 'ACTIVITY' tab is also visible, showing options to 'Log a Call', 'New Event', 'New Task', and 'More', along with an 'Activity Timeline' and 'Next Steps' section.

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

The screenshot shows the 'Territories (1)' section of the 'Account' page for 'FCS Bondi Beach'. A table with one row is highlighted with a green box. The table has columns for 'TERRITORY NAME', 'STATUS', 'TERRITORY OWNER', and 'ACTIVE'. The row contains the following data: 'Territory (D) - Bondi ...', 'Owned', 'Simon Walker', and a checked checkbox. Below the table is a 'View All' link. The 'Activity Lists' section is also visible, showing a table with columns for 'NAME', 'NUMBER OF TASKS', and 'COMPLETED TASKS'.

#### 4. The Territory must be Active.

The screenshot shows the Salesforce interface for a Territory record titled "Territory (D) - Bondi Beach". The record is in "Owned" status and is associated with the "FCS Bondi Beach" franchise and "OPS Head Office Manager" as the owner. The "Active" checkbox is checked and highlighted with a green box. The "Master Territory" is "Master Territory - NSW".

DETAILS	RELATED
Territory Name	Franchise
Territory (D) - Bondi Beach	FCS Bondi Beach
Status	Territory Owner
Owned	Simon Walker
Sub Status	Territory Owners Mobile
	0431661077
Product	Country
Bronze Territory	Australia
Product Classification	State
Bronze	NSW
Type	Territory Number
Metro	TER-451
Active	Timezone
<input checked="" type="checkbox"/>	Australia/Sydney GMT+1000

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

The screenshot shows the same Salesforce Territory record, but with the "RELATED" tab selected. It displays a list of "Territory Locations (2)". The list is highlighted with a green box and contains two entries:

TERRITORY LOCATION NAME	SUBURB	POSTCODE	STATE
<a href="#">2026-BONDI BEACH</a>	BONDI BEACH	2026	NSW
<a href="#">2026-NORTH BONDI</a>	NORTH BONDI	2026	NSW

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.

The screenshot shows the 'FCS Bondi Beach' account page. The 'Location Information' section is expanded, showing input fields for Street, Suburb, State, and Postcode, all of which are filled with the address '29 Sir Thomas Mitchell Rd', 'Bondi Beach', 'NSW', and '2026' respectively. To the right, the 'Travel Distance Origin' section has empty fields for Latitude, Longitude, and Geo-code Accuracy. A 'Save' button is located at the bottom right of the form.

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.

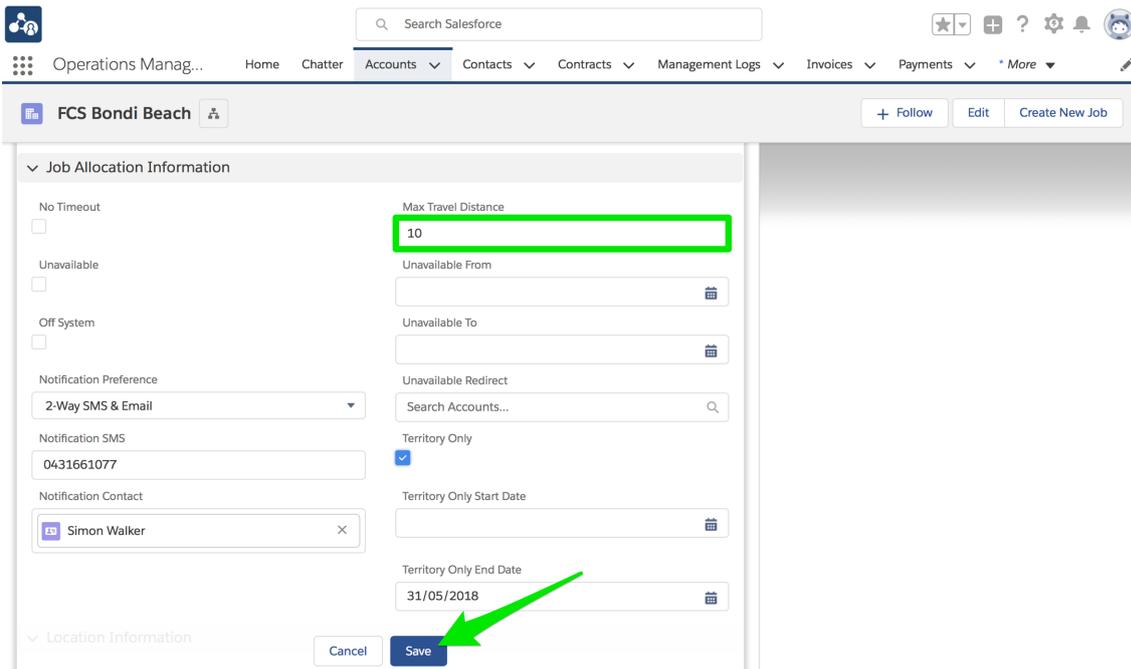
The screenshot shows the same 'FCS Bondi Beach' account page. The 'Travel Distance Origin' field is now populated with the coordinates '-33.8921444 , 151.2710367'. The 'Geo-code Accuracy' field is set to 'ROOFTOP'. The 'Street', 'Suburb', 'State', and 'Postcode' fields remain the same as in the previous screenshot.

## 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**.



The screenshot shows the Salesforce interface for configuring job allocation for 'FCS Bondi Beach'. The 'Job Allocation Information' section is expanded, showing various settings. The 'Max Travel Distance' field is highlighted with a green box and contains the value '10'. A green arrow points to the 'Save' button at the bottom of the form.

## 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.

The screenshot shows the 'Franchise Profile Account' for 'FCS Ringwood'. The 'Accounts' menu is selected, and the 'Related' tab is highlighted with a green arrow. The account details include:

- Type: FCS Ringwood
- Phone: 0404 303 808
- Website: [Blank]
- Account Owner: Ringwood Franchis...
- Account Site: [Blank]
- Industry: [Blank]

The 'Details' section shows:

- Sync Status: [Green arrow icon]
- Account Name: FCS Ringwood
- Master Franchise: VIC Master
- Status: Active
- Status Reason: [Blank]
- Inactive Reason: [Blank]
- Field Manager: [Blank]
- Timezone: Australia/Melbourne

The 'Account Owner' section shows:

- Account Owner: Ringwood Franchisee
- Email: loryn.jenkins@franchisecloudsolutions.com
- Phone: 0404 303 808
- Fax: [Blank]
- Cell Member Role: [Blank]
- Primary Cell Group: [Blank]
- Secondary Cell Group: [Blank]

The 'Connection Status' section shows:

- Connection Status: FCS Ringwood : Connected
- Connect to XEROX button

The 'Activity' section shows:

- Activity: Log a Call
- Chatter: [Blank]
- Filters: All time · All activities · All types
- Next Steps: More Steps
- No next steps. To get things moving, add a task or set up a

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

The screenshot shows the 'Business Hours' section for 'FCS Ringwood'. A green arrow points to the 'New' button. The table shows 5 business hours records:

BUSINESS HOURS ...	DAY	START TIME	END TIME	
<a href="#">BH-000074</a>	Monday	06:00 AM	09:30 PM	▼
<a href="#">BH-000076</a>	Tuesday	06:00 AM	09:30 PM	▼
<a href="#">BH-000079</a>	Wednesday	06:00 AM	09:30 PM	▼
<a href="#">BH-000080</a>	Thursday	06:00 AM	09:30 PM	▼
<a href="#">BH-000081</a>	Friday	06:00 AM	09:30 PM	▼

[View All](#)

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

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

New Business Hours

Select a record type

Contact Hours

Working Hours

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**.

New Business Hours: Contact Hours

**Information**

Business Hours Number

\* Day

\* Account

\* Start Time

\* End Time

**System Information**

Currency

Record Type **Contact Hours**

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

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

FCS Ringwood + Follow Edit

**Business Hours (6)**

BUSINESS HOURS ...	DAY	START TIME	END TIME
<a href="#">BH-000074</a>	Monday	06:00 AM	09:30 PM
<a href="#">BH-000076</a>	Tuesday	06:00 AM	09:30 PM
<a href="#">BH-000079</a>	Wednesday	06:00 AM	09:30 PM
<a href="#">BH-000080</a>	Thursday	06:00 AM	09:30 PM
<a href="#">BH-000081</a>	Friday	06:00 AM	09:30 PM
<a href="#">BH-000083</a>	Saturday	09:30 AM	04:30 PM

[View All](#)

## 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.

The screenshot shows the Salesforce interface for 'FCS Bondi Beach'. The 'Job Offer Information' section is expanded, showing various fields. The 'Daily Offer Target' field is highlighted with a green box and contains the value '2'. Other fields include 'Weekly Offer Target', 'Current # Daily Offers' (52), 'Daily Offer Variance' (-50.00), 'Daily Offer Variance Flag' (checkbox), 'Days Since Last Job Offer' (5), 'Current # Weekly Offers' (52), 'Weekly Offer Variance' (-46.00), 'Last Job Offer Date' (17/05/2018), and 'Last Job Date' (17/05/2018). Buttons for 'Cancel' and 'Save' are visible at the bottom.

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

The screenshot shows the Salesforce interface for 'FCS Bondi Beach'. The 'Job Offer Information' section is expanded, showing various fields. The 'Weekly Offer Target' field is highlighted with a green box and contains the value '6'. A green arrow points to the 'Save' button. Other fields are the same as in the previous screenshot.

## 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.

The screenshot shows the 'Job Allocation Information' section for the account 'FCS - Claymore'. The 'Territory Only' checkbox is checked and highlighted with a green box. Other fields include 'No Timeout', 'Off System', 'Notification Preference', '2-Way SMS & Email', 'Notification SMS', 'Notification Contact', 'Max Travel Distance', 'Unavailable', 'Unavailable From', 'Unavailable To', and 'Unavailable Redirect'.

## 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

The screenshot shows the 'Job Allocation Information' section for the account 'FCS - Claymore'. The 'Territory Only' checkbox is checked. The 'Territory Only Start Date' is set to '11/09/2019' and the 'Territory Only End Date' is set to '4/10/2019'. These two date fields are highlighted with a green box.

## 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.

FRANCHISE CLOUD SOLUTIONS

All Search Accounts and more...

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

Account FCS - Claymore

Job Allocation Information

No Timeout	<input type="checkbox"/>	Max Travel Distance	10
Off System	<input type="checkbox"/>	Unavailable	<input checked="" type="checkbox"/>
Notification Preference	2-Way SMS & Email	Unavailable From	
Notification SMS	0421788574	Unavailable To	
Notification Contact	John Smith	Unavailable Redirect	
		Territory Only	<input type="checkbox"/>
		Territory Only Start Date	11/09/2019
		Territory Only End Date	4/10/2019

## 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.

FRANCHISE CLOUD SOLUTIONS

All Search Accounts and more...

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

Account FCS - Claymore

Job Allocation Information

No Timeout	<input type="checkbox"/>	Max Travel Distance	10
Off System	<input type="checkbox"/>	Unavailable	<input type="checkbox"/>
Notification Preference	2-Way SMS & Email	Unavailable From	11/09/2019
Notification SMS	0421788574	Unavailable To	9/10/2019
Notification Contact	John Smith	Unavailable Redirect	
		Territory Only	<input type="checkbox"/>
		Territory Only Start Date	11/09/2019
		Territory Only End Date	4/10/2019



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

The screenshot shows the 'Job Allocation Information' section for the account 'FCS - Claymore'. The 'Unavailable Redirect' option is highlighted with a green box, indicating it is selected. The dropdown menu shows 'FCS - Campbelltown' as the selected option.

Job Allocation Information	
No Timeout	Max Travel Distance
<input type="checkbox"/>	10
Off System	Unavailable
<input type="checkbox"/>	<input type="checkbox"/>
Notification Preference	Unavailable From
2-Way SMS & Email	11/09/2019
Notification SMS	Unavailable To
0421788574	9/10/2019
Notification Contact	Unavailable Redirect
<a href="#">John Smith</a>	<a href="#">FCS - Campbelltown</a>
	Territory Only
	<input type="checkbox"/>
	Territory Only Start Date
	11/09/2019
	Territory Only End Date
	4/10/2019

## 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.

The screenshot shows the user interface for the 'FCS Bondi Beach' account. At the top, there is a navigation bar with tabs for 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', 'Expenses', 'Jobs', and 'More'. A search bar contains 'bondi beach'. Below the navigation bar, the account name 'FCS Bondi Beach' is displayed with a '+ Follow', 'Edit', and 'Create New Job' button. The main content area is titled 'Job Allocation Information' and contains several settings:

No Timeout	<input type="checkbox"/>	Max Travel Distance	10
Unavailable	<input type="checkbox"/>	Unavailable From	
<b>Off System</b>	<input checked="" type="checkbox"/>	Unavailable To	
Notification Preference	2-Way SMS & Email	Unavailable Redirect	
Notification SMS	0431661077	Territory Only	<input type="checkbox"/>
		Territory Only Start Date	
		Territory Only End Date	

## 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**.

The screenshot shows the configuration page for 'FCS Ringwood'. The 'Job Allocation Information' section is highlighted with a green border. It contains the following fields:

Field Name	Value
No Timeout	<input type="checkbox"/>
Unavailable	<input type="checkbox"/>
Off System	<input type="checkbox"/>
Notification Preference	Email
Notification Contact	Ringwood Franchisee
Notification SMS	0404 808 949
Max Travel Distance	10
Unavailable From	
Unavailable To	
Unavailable Redirect	
Territory Only	<input checked="" type="checkbox"/>
Territory Only Start Date	
Territory Only End Date	

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

2. Select the appropriate option from Notification Preference.

The screenshot shows the 'FCS Ringwood' account page in the Operations Management system. The 'Notification Preference' dropdown menu is open, displaying the following options: --None--, 1-Way SMS, 2-Way SMS, Email (which is currently selected), 1-Way SMS & Email, and 2-Way SMS & Email. A green arrow points to the '2-Way SMS & Email' option. Other settings visible include 'Job Allocation Information' with checkboxes for 'No Timeout', 'Unavailable', and 'Off System'; 'Max Travel Distance' set to 10; 'Unavailable From' and 'Unavailable To' date pickers; 'Unavailable Redirect' search; 'Territory Only' checked; and 'Territory Only Start Date' and 'Territory Only End Date' date pickers.

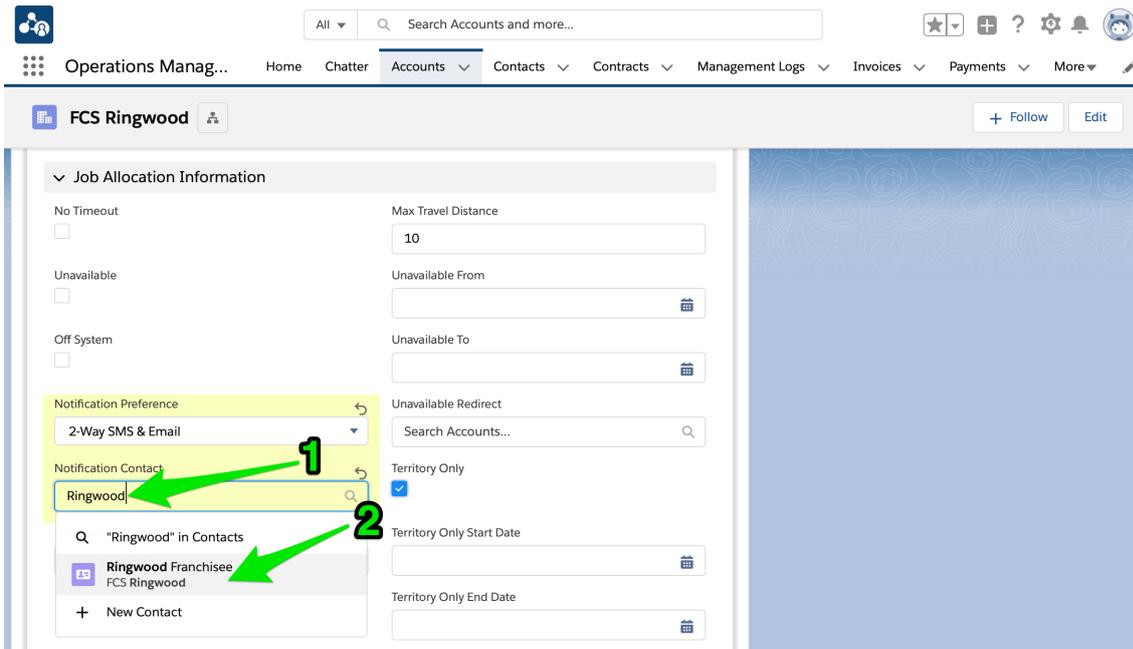


If SMS options are not available you may not be licensed for SMS Management.

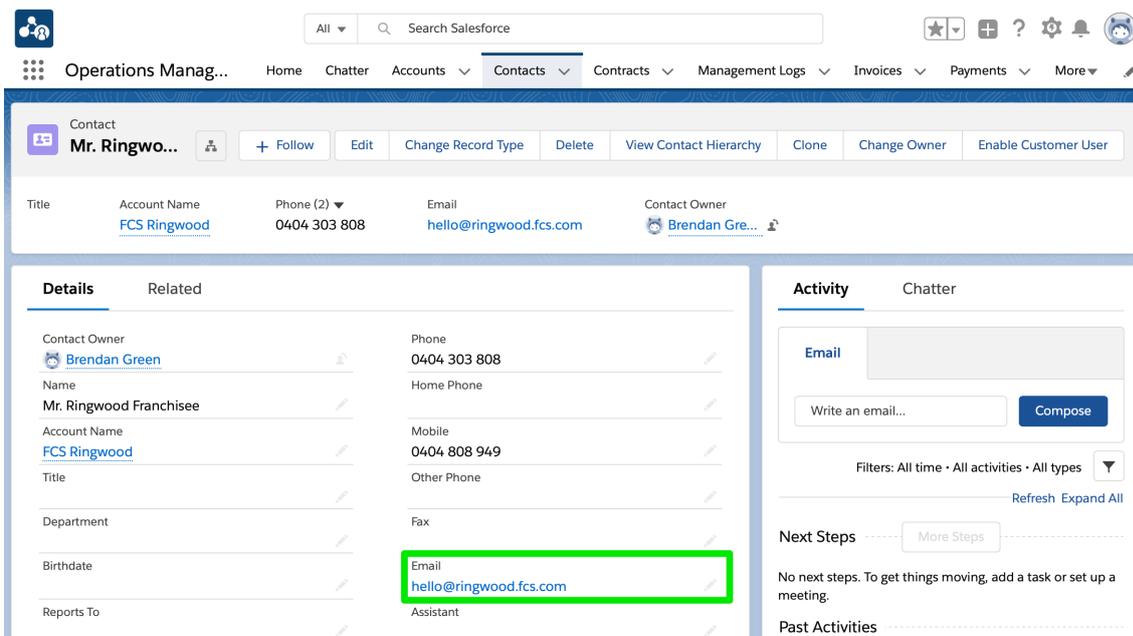
3. If your organization has licensed SMS Management, enter the appropriate mobile phone number into Notification SMS.

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

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# Configuration potential within the job allocation system



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

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

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

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

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



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

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

## Duplicate job checking rules

Duplicate jobs can arise through

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

In each of these cases, the first job request enters the Job Allocation system. Subsequent jobs are automatically matched via a configured rule set. The system flags all

duplicates that match the rule set. Manual review of these duplicates is highly recommended.

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

Job Allocation can be configured by

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

## Job eligibility rules

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

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

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

## Distance calculation options

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

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

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

## Exclusiveness of territory

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

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

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

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

## Parallel vs. sequential job offers

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

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

## Queuing job offers

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

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

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

## Throttling job offers

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

## Ranking rules

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



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

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

## Regional and isolated territories

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

# Job allocation process

## Introduction

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

This chapter describes:

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

To learn how to provide on-going management of and intervention in exceptional cases, See “Managing Job Allocation” on page 143.

## How it works

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

The screenshot displays a Salesforce record for job 'JN-00401'. The 'Job Contact Information' section includes fields for Salutation, First Name (Luke), Last Name (Dardanelles), Email (lorynj@gmail.com), Mobile (0404888444), and Other Phone (0404888444). A green box highlights the 'Street' field with the value '22 Swanson Way'. Below this, the 'Territory & Location Information' section is also highlighted with a green box, showing 'Territory - Claymore' and 'Territory Franchisee - FCS - Claymore'. A green arrow points from the 'Street' field to the 'Territory & Location Information' section, with the text 'Job Address drives Territory and Location Information' written in green next to it.

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

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

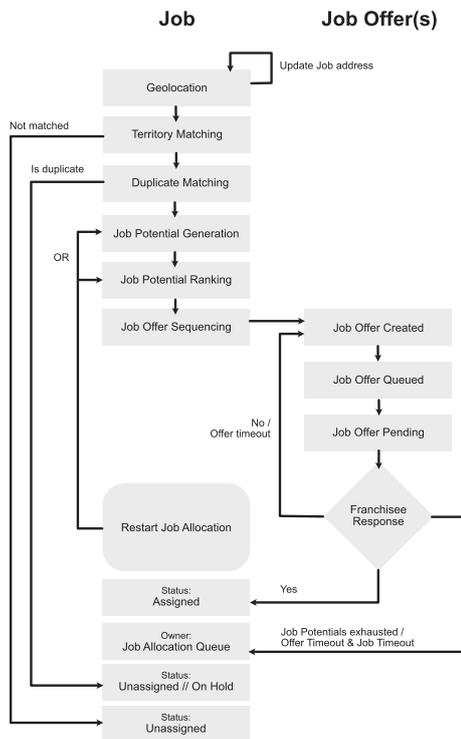
Job offers are then made to franchisees. Using the configured rule set in conjunction with the responses of franchisees, allocation to a franchisee is then made.



Manual monitoring is required to deal with the exceptional cases that fail to enter job allocation or fail to allocate to a particular franchisee. For information about manual oversight of job allocation, See “Managing Job Allocation” on page 143.

## Step-by-step

The Job Allocation System operates on a **Job** and one or more **Job Offer(s)**. 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.

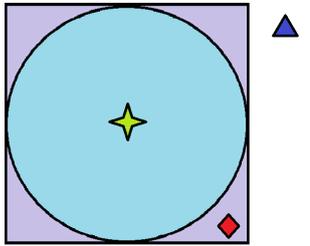


### Tip 1: Why some franchisees are excluded by max travel distance criteria

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

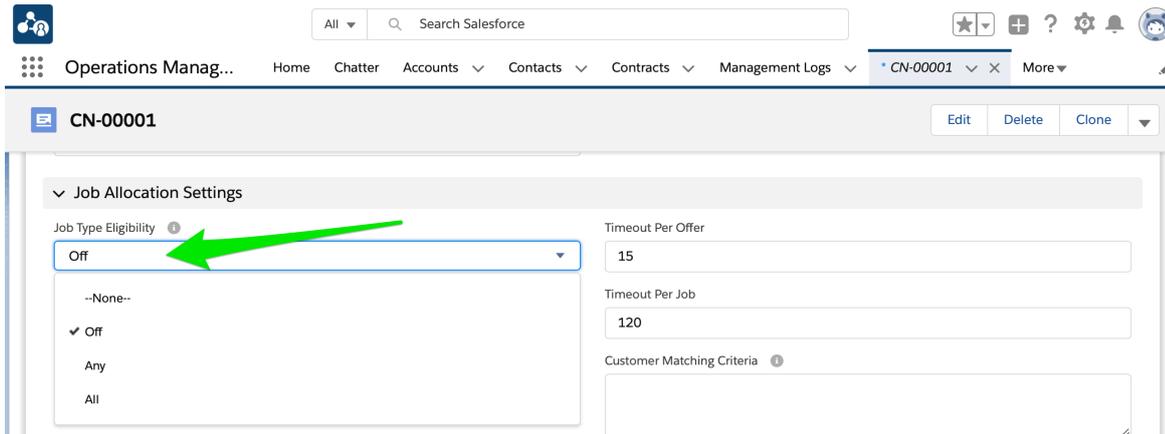
Some eligibility requirements are built into Operations Management. The two major built-in eligibility criteria are

- » 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	<p>Job is newly created and has not yet been assigned to a Franchisee.</p> <div style="border: 1px solid #0070C0; padding: 5px;">  <p>This status is now obsolete. Queued for Allocation is used in its place.</p> </div>
	Queued for Allocation	Auto	Job is newly created and is awaiting allocation to a Franchisee.
	In Allocation	Auto	Job is being managed by the Job Allocation System, waiting to be allocated.
	On Hold	Manual	Job has been placed on hold by the Job Allocation system due to inability to assign to a Franchisee. Requires manual intervention in order for it to be assigned to a franchisee.
Assigned	--None--	Auto	Job has been assigned to a franchisee. Franchisee is yet to make contact with the customer.
	Manually Allocated	Auto	Job has been force allocated to a Franchisee. Franchisee is yet to make contact with the customer.

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

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

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

Job Status	Substatus	Transition	Description
Invoice	In Progress	Auto	Invoice is generated causes transition. You have generated the invoice.
	Completed	Manual	Customer has paid the invoice.
			 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

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# 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**.

The screenshot shows the Salesforce Jobs interface. At the top, there is a search bar and a navigation menu with options like 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Jobs', and 'More'. A green arrow labeled '1' points to the 'Jobs' menu. Below the navigation menu, there is a 'Jobs' section with a 'Recently Viewed' dropdown. A green arrow labeled '2' points to this dropdown. A green box labeled '3' highlights the 'Aged Jobs' option in the list view menu. The main table shows a list of jobs with columns for 'ANCHISE', 'STATUS', and 'TERRITORY'. The table contains 6 items, with the first item being 'All Jobs' (Unassigned) and the last item being 'JN-00155' (Unassigned).



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.

- 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*.

The screenshot shows the 'Jobs' section in the 'Operations Management' system. The view is titled 'Aged Jobs' and displays 39 items. The list is sorted by Job Number and filtered by Status and Created Date. The filters applied are 'Created Date not equal to LAST 1 DAYS' and 'Status equals Unassigned'. The table below shows the first 12 items of the list.

	JOB NU...	SUBURB	TERRITORY	TERRITOR...	STATUS	SUB STAT...	SUB-STAT...
1	JN-00001	Sydney			Unassigned		
2	JN-00003	Sydney			Unassigned		
3	JN-00017	Sydney			Unassigned		
4	JN-00022	Randwick	Territory (...)	Unowned	Unassigned		
5	JN-00023	randwick			Unassigned		
6	JN-00024	randwick			Unassigned		
7	JN-00025	Randwick			Unassigned		
8	JN-00026	Randwick			Unassigned		
9	JN-00027	Randwick			Unassigned		
10	JN-00028	Randwick			Unassigned		
11	JN-00031	Randwick	Territory (...)	Unowned	Unassigned		
12	JN-00036	Birchgrove	Territory - ...	Owned	Unassigned		

- Add columns that you find useful. See “How to add columns to a list view” on page 21.
- 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.

- 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.
- 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.

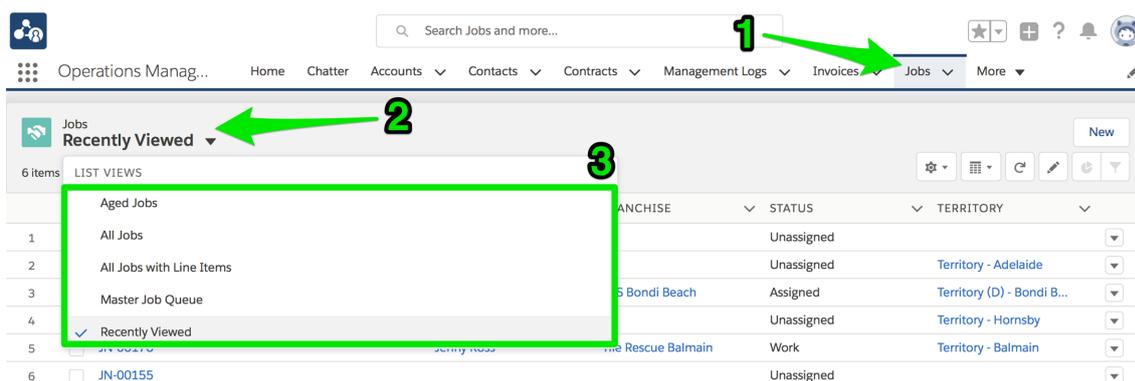
# How to check for duplicate jobs

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**.



The screenshot shows the Salesforce interface for the 'Jobs' object. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', and 'Jobs'. A search bar is present with the text 'Search Jobs and more...'. A green arrow labeled '1' points to the 'Jobs' menu. Below the navigation bar, the 'Jobs' list view is displayed. A dropdown menu is open, showing a list of list views: 'Aged Jobs', 'All Jobs', 'All Jobs with Line Items', 'Master Job Queue', 'Recently Viewed' (selected), and 'JN-00155'. A green arrow labeled '2' points to the 'Recently Viewed' dropdown, and another green arrow labeled '3' points to the 'Recently Viewed' list view item. The main table shows columns for 'ANCHISE', 'STATUS', and 'TERRITORY'.

ANCHISE	STATUS	TERRITORY
	Unassigned	
	Unassigned	Territory - Adelaide
5 Bondi Beach	Assigned	Territory (D) - Bondi B...
	Unassigned	Territory - Hornsby
	Work	Territory - Balmain
	Unassigned	



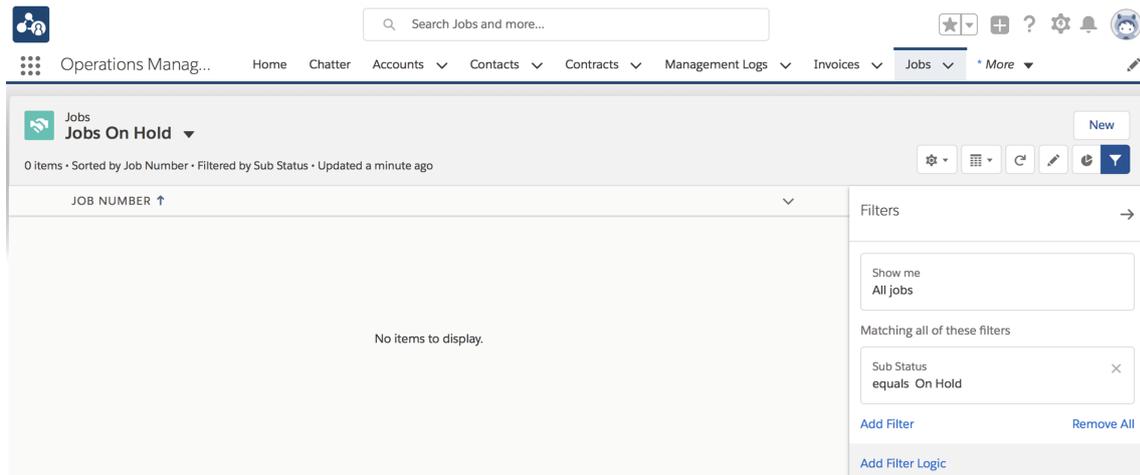
It is possible you don't have a **Jobs On Hold** list view.

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.

ANCHISE	STATUS	TERRITORY
5 Bondi	Closed	
5 Bondi Beach	Assigned	Territory (D) - Bondi B...
5 Bondi Beach	Closed	
JN-UUZUS	Unassigned	
JN-00193	Smith - Tiling	Steve Smith Tile Rescue Lilydale Invoice Territory - Lilydale

## 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.

The screenshot displays the 'Job JN-00102' details page. At the top, there are navigation tabs: Unassigned, Assigned, Contact, Planning, Work, Invoice, and Closed. The 'Details' section is divided into 'Job Allocation View' and 'Activity'. In the 'Job Allocation View', the 'Owner' field is set to 'Default Job Queue' and the 'Geo-code Accuracy' is 'RANGE\_INTERPOLATED'. A black arrow points from the 'RANGE\_INTERPOLATED' field to the 'Default Job Queue' field. The 'Activity' section shows an 'Email' field with a 'Create new...' button and an 'Add' button. The 'Chatter' section is empty.

## To remedy an incorrect or imprecise address

1. Edit the address.

The screenshot shows the 'Job Contact Information' form for job JN-00102. The form includes fields for Salutation, First Name, Last Name, Company, Email, Street, Suburb, Postcode, and Country. The 'Street' field is highlighted with a green box and contains the text '9 Lisgoold Street'. A green arrow points to the 'Save' button at the bottom of the form.

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*).

FRANCHISE CLOUD SOLUTIONS

All Search...

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

Job JN-00102 + Follow Match Customer Plan Job Schedule Job Invoice Job Supplier Invoice Credit Job Edit

Job Contact Information

Salutation: --None--

First Name: Greg

Last Name: Stimpson

Company:

Email:

Mobile:

Other Phone:

Force Street Address:

Street: 1/99 Burrendah Blvd

\* Suburb: Willetton

\* Postcode: 6155

\* Country: Australia

View all dependencies

\* State: WA

View all dependencies

Map Job: [View Google Map](#)  
This field is calculated upon save

Geo-code Accuracy: ROOFTOP

Job Description:

Cancel Save

# 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.

Decline

Status  
Declined

Comments  
Job requires electrical license.

Cancel Save

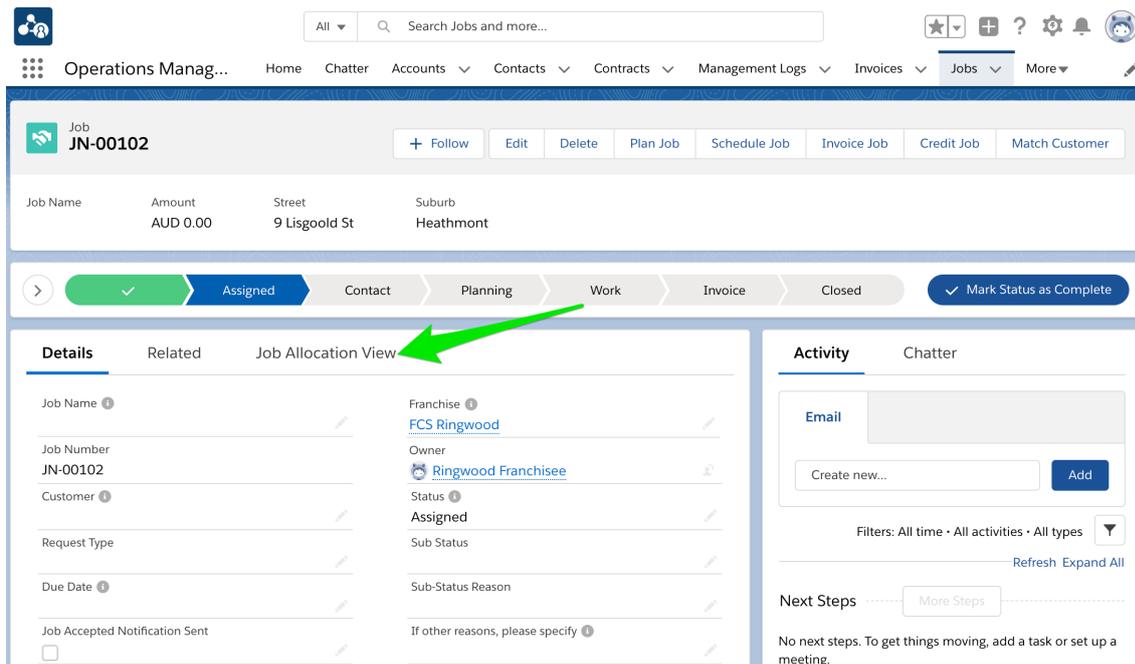


On restarting the job allocation process:

- » 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.

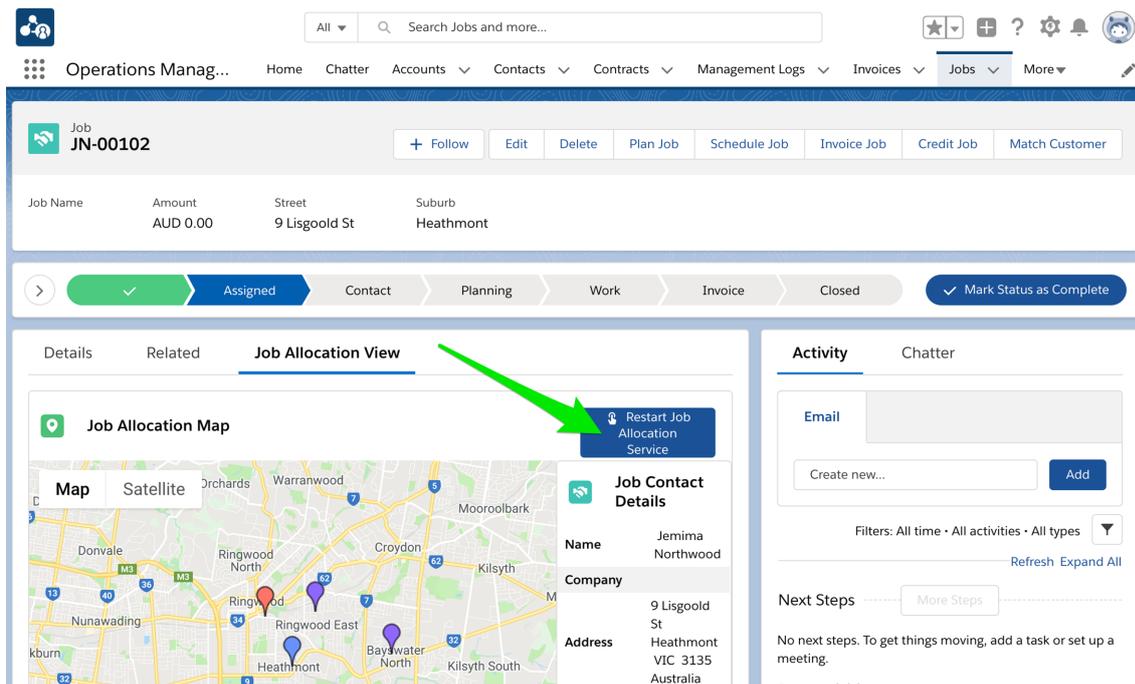
## To restart the job allocation service

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



The screenshot shows the 'Job Allocation View' for job JN-00102. The job details include Job Name, Amount (AUD 0.00), Street (9 Lisgoold St), and Suburb (Heathmont). The status is 'Assigned'. A green arrow points to the 'Job Allocation View' tab in the navigation bar. The 'Details' section shows Franchise (FCS Ringwood), Owner (Ringwood Franchisee), Status (Assigned), and Sub Status. The 'Activity' section shows an email field and a 'Create new...' button.

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



The screenshot shows the 'Job Allocation View' for job JN-00102. The job details are the same as in the previous screenshot. A green arrow points to the 'Restart Job Allocation Service' button in the 'Job Allocation Map' section. The 'Job Contact Details' section shows Name (Jemima Northwood), Company, and Address (9 Lisgoold St, Heathmont VIC 3135, Australia). The 'Activity' section shows an email field and a 'Create new...' button.

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

**Job JN-00102**

Job Name: Amount AUD 0.00 Street: 9 Lisgoold St Suburb: Heathmont

Assigned | Contact | Planning | Work | Invoice | Closed | Mark Status as Complete

**Job Allocation View**

**Job Allocation Map**

Restart Job Allocation Service

**Job Contact Details**

Name: Jemima Northwood  
 Company: 9 Lisgoold St, Heathmont VIC 3135 Australia  
 Address: 9 Lisgoold St, Heathmont VIC 3135 Australia  
 Mobile: 0431661077  
 Email: [Redacted]  
 Do Not Contact with Others: [ ]

**Legend**

JOB LOCATION (blue pin), ACCEPTED (green pin), DECLINED (red pin), EXPIRED/TIMED OUT (yellow pin), JOB POTENTIALS (purple pin), OTHERS (pink pin)

**Job Offers**

ACTION	JOB OFFER NUMBER	FRANCHISEE NAME	STATUS
Force Allocate	JON-00083	FCS Ringwood	Declined
Force Allocate	JON-00084	FCS Ringwood East	Accepted

**Activity** | Chatter

Email: [Redacted]  
 Create new... [Add]  
 Filters: All time · All activities · All types  
 Refresh Expand All

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

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



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

The screenshot displays the 'Job Allocation Map' interface. On the left, a map shows various job locations marked with pins. A green arrow points to a red pin labeled 'JON-00363 FCS - Ringwood'. A 'click' label is placed over the map. On the right, the 'Job Contact Details' panel is open, showing the following information:

<b>Name</b>	Tammy Jenkins
<b>Company</b>	FCS - Lilydale
<b>Address</b>	12 Wonga Rd Ringwood VIC 3134 Australia
<b>Mobile</b>	0431661077
<b>Email</b>	
<b>Do Not Contact with Other Offers</b>	<input type="checkbox"/>

Below the map is a legend with the following categories and icons:

- JOB LOCATION (blue pin)
- ACCEPTED (green pin)
- DECLINED (red pin)
- EXPIRED/TIMED OUT (yellow pin)
- JOB POTENTIALS (purple pin)
- OTHERS (pink pin)

# 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.

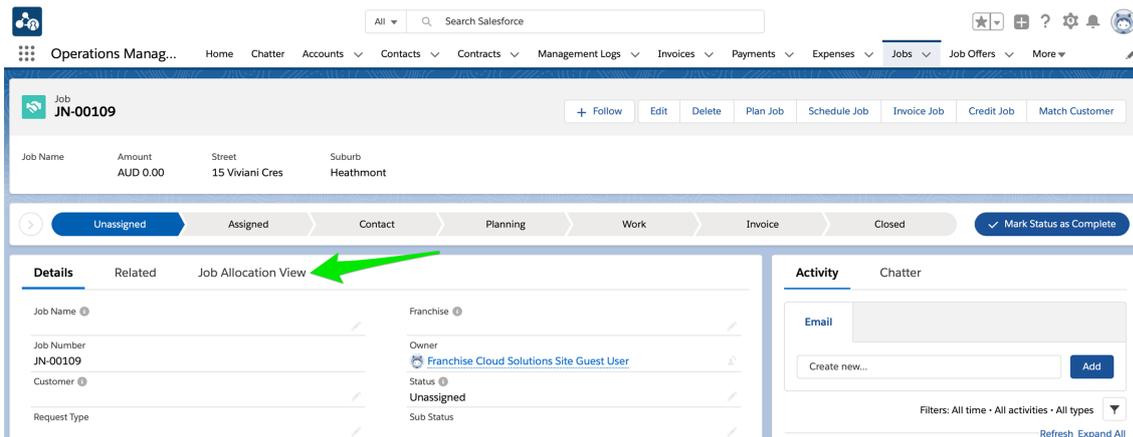
The **Job Allocation View** allows you to **Force Allocate** a **Job** to one of the potential franchisees.



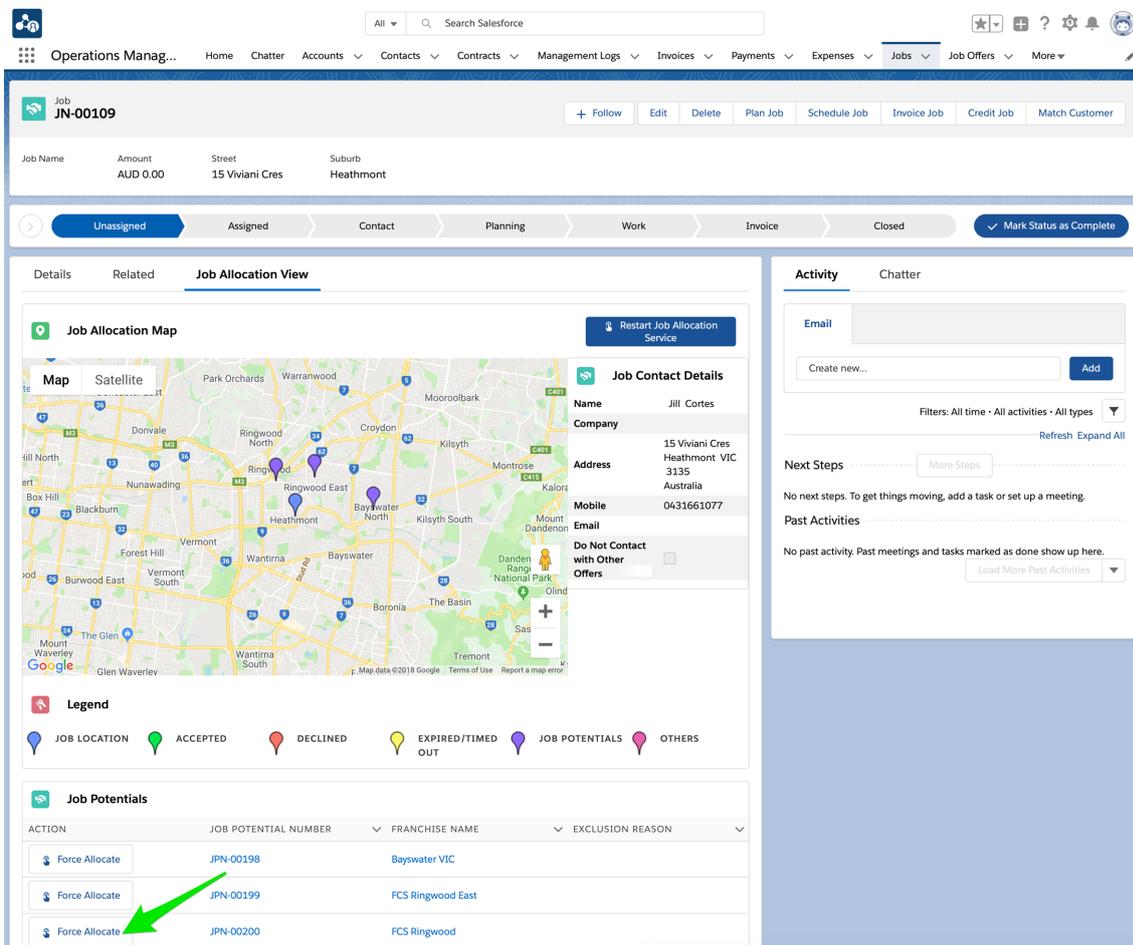
You may only select between the franchisees that were initially considered potentials for the Job. If you need to allocate the Job to a franchisee other than one of the **Job Potentials**, then you need to assign the Job manually. See "How to manually allocate a job" on page 161.

# 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.

The screenshot displays the Salesforce Operations Management interface for a job titled "Job JN-00109". The top navigation bar includes "Operations Manag...", "Home", "Chatter", "Accounts", "Contacts", "Contracts", "Management Logs", "Invoices", "Payments", "Expenses", "Jobs", "Job Offers", and "More". A search bar and utility icons are also present.

Job details include:  
Job Name: JN-00109  
Amount: AUD 0.00  
Street: 15 Viviani Cres  
Suburb: Heathmont

The job status is "Assigned", highlighted in a blue bar. A progress bar shows stages: Assigned (active), Contact, Planning, Work, Invoice, and Closed. A "Mark Status as Complete" button is visible.

The "Details" section is divided into "Related" and "Job Allocation View". The "Job Allocation View" table is highlighted with a green border and contains the following data:

Field	Value
Franchise	FCS Ringwood
Owner	Ringwood Franchisee
Status	Assigned
Sub Status	
Sub-Status Reason	

The "Activity" section on the right includes an "Email" activity with a "Create new..." button and an "Add" button. Below it are filters for "All time", "All activities", and "All types", along with "Refresh" and "Expand All" options. A "Next Steps" section with a "More Steps" button is also visible.

# 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.

The screenshot shows the 'Job' management interface for Job JN-00108. The job details are as follows:

Job Name	Amount	Street	Suburb
	AUD 0.00	12 Lisgold Street	Heathmont

The job status is 'Unassigned'. The interface includes a navigation bar with tabs: Unassigned, Assigned, Contact, Planning, Work, Invoice, Closed. A green arrow points to the 'Edit' button in the top right corner of the job details section.

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

The screenshot displays the 'Job JN-00108' details page in the Operations Management system. The 'Franchise' dropdown menu is open, showing search results for 'ring'. The dropdown is highlighted in yellow, and a red arrow labeled '1' points to the search input field. Another red arrow labeled '2' points to the 'FCS Ringwood' result, which is highlighted in blue. The job details on the left include Job Name, Job Number (JN-00108), Customer, Request Type (--None--), Due Date, and Job Accepted Notification Sent. The right panel shows the 'Activity' and 'Chatter' sections.

Job Name	Amount	Street	Suburb
	AUD 0.00	12 Lisgold Street	Heathmont

Unassigned Assigned Contact Planning Work Invoice Closed Mark Status as Complete

Details Related Job Allocation View

Job Name: [input field]

Job Number: JN-00108

Customer: [Search Accounts...]

Request Type: --None--

Due Date: [calendar icon]

Job Accepted Notification Sent:

Franchise: ring

- Q "ring" in Accounts
- FCS Ringwood
- FCS Ringwood East
- + New Account

--None--

Sub-Status Reason: --None--

If other reasons, please specify: [input field]

Territory Category: [input field]

Activity Chatter

Email: [input field]

Create new... Add

Filters: All time · All activities · All types

Refresh Expand All

Next Steps: More Steps

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

Past Activities: Load More Past Activities

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

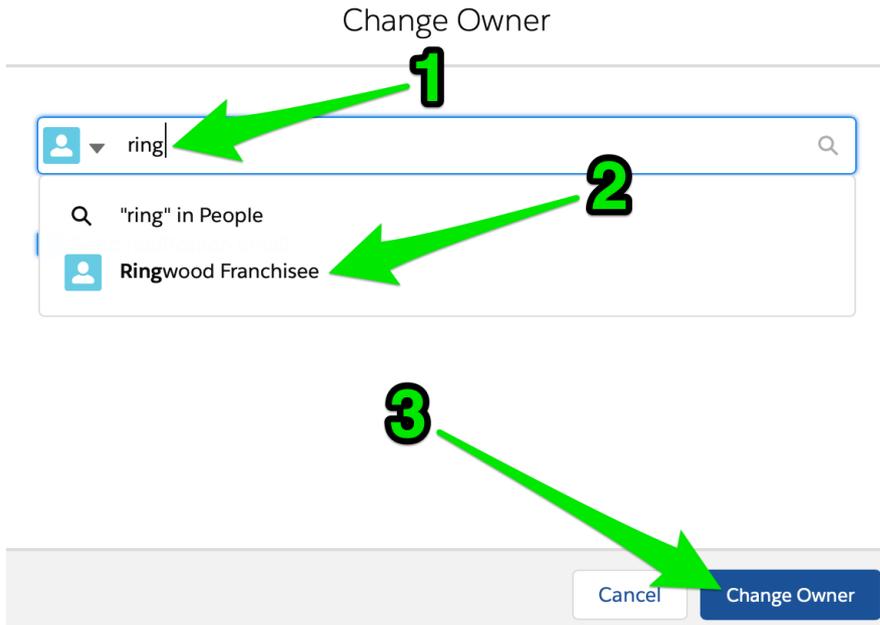
The screenshot shows the 'Job JN-00108' details page. The status is 'Unassigned'. A dropdown menu is open, showing options: Unassigned, --None--, Assigned, Contact, Planning, Work, Invoice. Green arrows point to 'Assigned' (1), the dropdown (2), and the 'Save' button (3).

### 4. Now switch the owner.

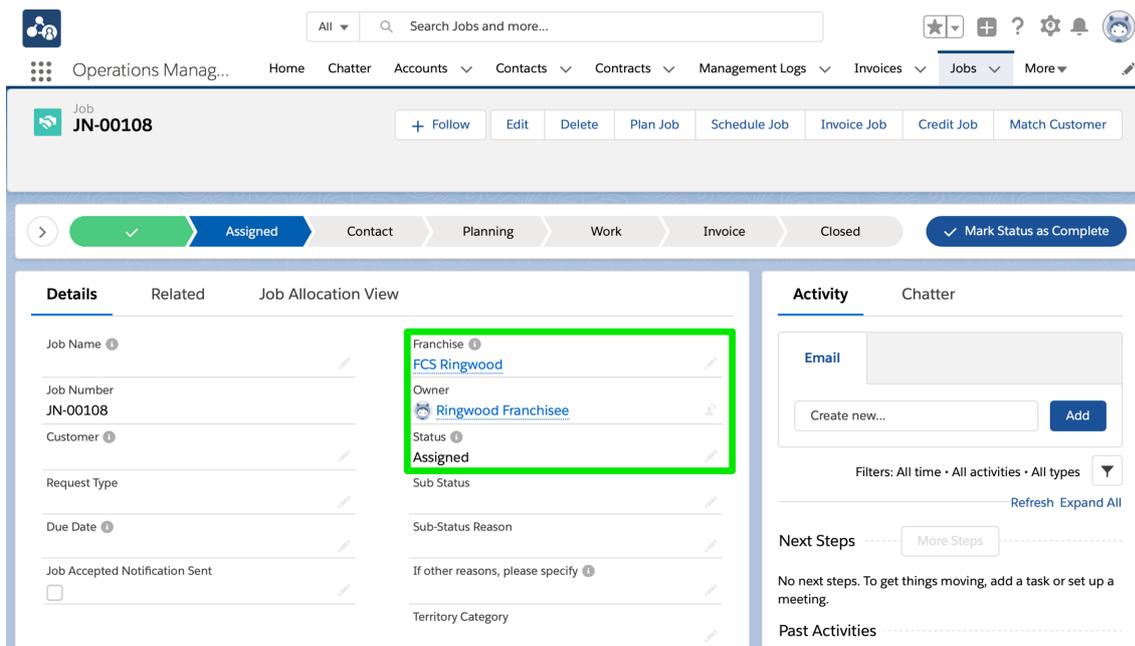
The screenshot shows the 'Job JN-00108' details page. The status is now 'Assigned'. A green arrow points to the 'Change Owner' icon (a person with a plus sign) next to the 'Owner' field.

The Change Owner dialog box displays.

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



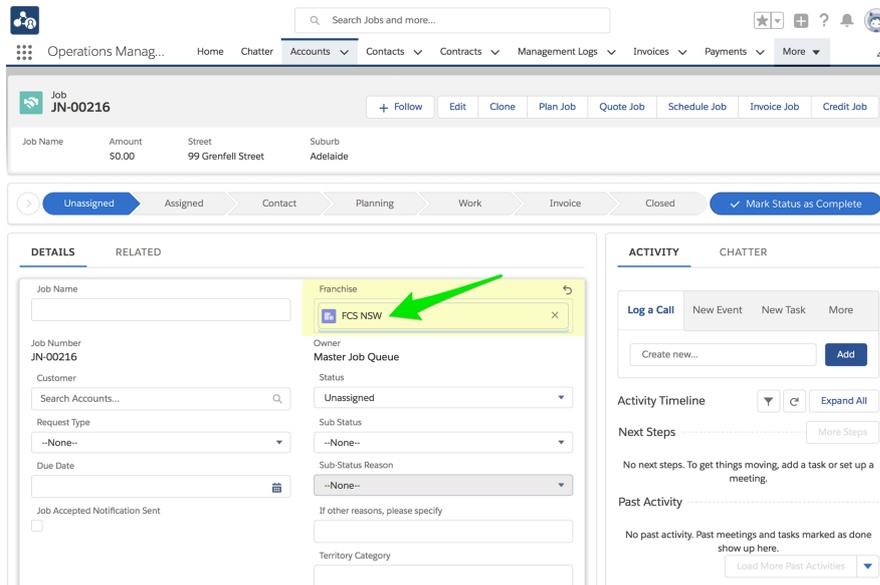
The job is now manually allocated.



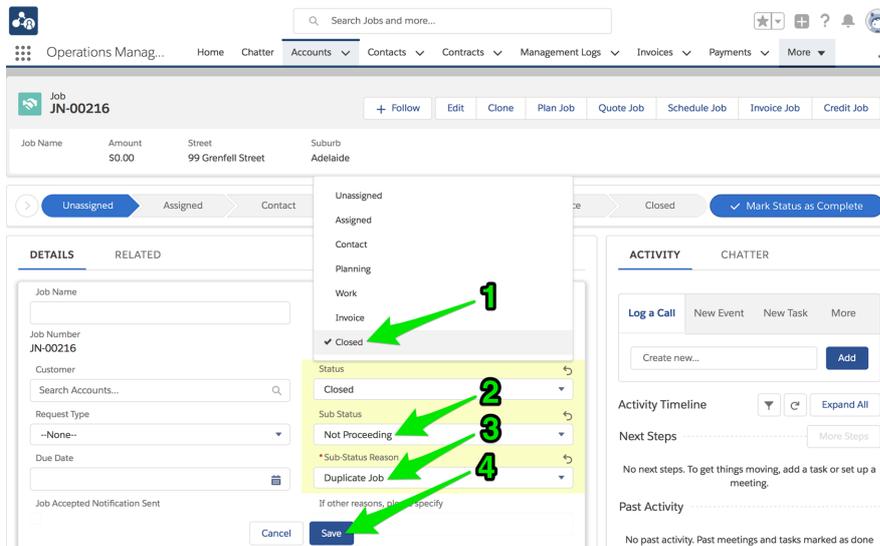
# How to manually close a job

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:

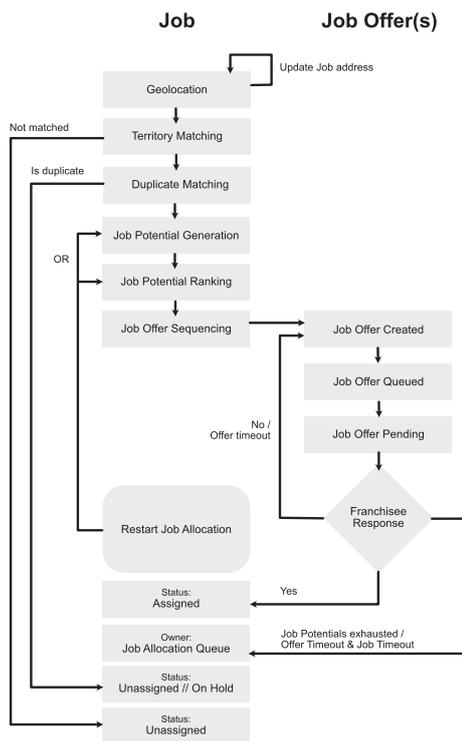
- » “Understanding Job Allocation” on page 119
- » “Managing Job Allocation” on page 143

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.

Job	
Unassigned	Location is empty Territory is empty Geo-code accuracy not ROOFTOP Territory Status is unexpectedly "unowned" Job Potentials not generated
Substatus: On Hold	Duplicate match
Owner: Job Allocation Queue	Job Offer Timeout reached One or more franchise exclusion reasons Job Timeout reached
Assigned	Job not offered to the expected franchise

Job Offer	
Notification	SMS received but not email Email received but not SMS No job offer exists
Status: Queued	Scheduled Offer Time empty Scheduled Offer Time not empty
Status: Pending	No response from franchisee Acceptance declined

## 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 post-code 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 there 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.

Job Contact Information	
Salutation	Force Street Address
First Name	Street
Iain	18 Bang Ban St
Last Name	Suburb
Test3	KOORAWATHA
Company	Postcode
	2807
Email	Country
	Australia
Mobile	State
	NSW
Other Phone	Geo-code Accuracy
	GEOMETRIC_CENTER
Supplied Address	Geocoded Address
18 Bang Ban St, KOORAWATHA NSW 2807 Australia	Bang Bang Rd, Koorawatha NSW 2807, Australia (route) GEOMETRIC_CENTER
Map Job	
<a href="#">View Google Map</a>	
Job Description	
More Information	
TEST3 - Build it, lock it and repair it	
Job Scheduled Date/Time	

### 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

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# 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.

The screenshot shows the CARPET COURT Management Log interface. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Customer Feedback', 'Tasks', 'Management Logs', 'Territories', and 'Territory Locations'. The main content area displays a Management Log record for 'LOG-00005' with the following details:

Record Type	Type	Organiser	Start	End	Status
Meeting	Store visit - general	Greg Zeegers	2/12/2020, 12:00 pm	2/12/2020, 2:30 pm	Pending

The 'Details' section includes:

- Log Number:** LOG-00005
- Status:** Pending
- Start:** 2/12/2020, 12:00 pm
- End:** 2/12/2020, 2:30 pm
- Owner:** Dean Llewellyn
- Type:** Store visit - general
- Franchise:** Barry Evans Furniture & Floorcoverings
- Organiser:** Greg Zeegers

The 'Reminder Details' section shows:

- Send Email Reminder:**
- Send Email Reminder Date:** 1/12/2020, 12:00 pm

The 'Attendee Summary' section shows:

- Number of Attendees:** 0
- Number of Apologies:** 0

The 'System Information' section shows:

- Created By:** Dean Llewellyn, 27/11/2020, 1:07 pm
- Last Modified By:** Dean Llewellyn, 27/11/2020, 1:07 pm
- Currency:** AUD - Australian Dollar
- Record Type:** Meeting

The 'Activity' section on the right includes options for 'Log a Call', 'New Event', 'New Task', and 'Email'. It also features a search bar for 'Recap your call...', filters for 'All time', 'All activities', and 'All types', and an 'Upcoming & Overdue' section with the message: 'No next steps. To get things moving, add a task or set up a meeting. No past activity. Past meetings and tasks marked as done show up here.'

Search Management Logs and more...

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

Management Log LOG-00026 + Follow Edit Clone Delete

Record Type	Type	Organiser	Start	End	Status
Meeting	Ongoing Support	OPS Operations Manager	22/05/2018 12:00 PM	23/05/2018 12:00 PM	Completed

**DETAILS** RELATED

Log Number: LOG-00026  
 Status: Completed  
 Start: 22/05/2018 12:00 PM  
 End: 23/05/2018 12:00 PM  
 Cell Group:

**Reminder Details**

Send Email Reminder:   
 Send Email Reminder Date: 21/05/2018 4:30 PM

**Attendee Summary**

Number of Attendees: 1  
 Number of Apologies: 1

**System Information**

Created By: FCS System Administrator, 6/11/2017 1:30 PM  
 Last Modified By: OPS Head Office Manager, 21/05/2018 4:28 PM  
 Currency: Australian Dollar  
 Record Type: Meeting

**ACTIVITY** CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

- New Franchisee I... 11/11/2017  
OPS Field Manager has an upcoming Task
- Issue Operations ... 11/11/2017  
OPS Operations Manager has an upcoming Task

Past Activity

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

Activity Lists Add List

NAME	NUMBER OF TASKS	COMPLET
------	-----------------	---------

## 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.

Search Salesforce

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

Management Log LOG-00020 + Follow Edit Clone Delete

Record Type	Organiser	Field Manager	Start	End	Status
Induction	OPS Field Manager	OPS Field Manager	1/06/2018 9:00 AM	1/06/2018 4:00 PM	Confirmed

**DETAILS** RELATED

Log Number: LOG-00020  
 Status: Confirmed  
 Start: 1/06/2018 9:00 AM  
 End: 1/06/2018 4:00 PM

**Reminder Details**

Send Email Reminder:   
 Send Email Reminder Date: 31/05/2018 12:00 PM

**Attendee Summary**

Number of Attendees: 1  
 Number of Apologies: 0

**System Information**

Created By: OPS Operations Manager, 25/10/2017 10:49 AM  
 Last Modified By: OPS Head Office Manager, 23/05/2018 10:28 AM  
 Currency: Australian Dollar  
 Record Type: Induction

**ACTIVITY** CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

- New Franchisee I... 30/10/2017  
OPS Operations Manager has an upcoming Task
- Book commence... 30/10/2017  
OPS Field Manager has an upcoming Task

Past Activity

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

Activity Lists Add List

# 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.

The screenshot shows a web application interface for a 'Management Log' record. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. A search bar is present with the text 'Search Management Logs and more...'. The main content area is titled 'Management Log LOG-00054' and includes buttons for '+ Follow', 'Edit', 'Clone', and 'Delete'. The interface is divided into two main sections: 'DETAILS' and 'ACTIVITY'. The 'DETAILS' section is further divided into 'RELATED' and 'System Information'. The 'RELATED' section contains fields for Log Number (LOG-00054), Status (Pending), Start (11/06/2018 10:00 AM), End (12/06/2018 4:00 PM), Owner (OPS Head Office Manager), Type (Other), Franchise (FCS Bondi Beach), and Organiser (OPS Compliance Manager). The 'System Information' section shows Created By (OPS Head Office Manager, 23/05/2018 10:32 AM), Last Modified By (OPS Head Office Manager, 23/05/2018 10:32 AM), Currency (Australian Dollar), and Record Type (Field Audit). The 'ACTIVITY' section is divided into 'ACTIVITY' and 'CHATTER'. The 'ACTIVITY' section includes a 'Log a Call' button, a 'New Event' button, a 'New Task' button, and a 'More' button. Below these are buttons for 'Create new...' and 'Add'. The 'ACTIVITY' section also includes an 'Activity Timeline' section with a dropdown menu and an 'Expand All' button. Below this is a 'Next Steps' section with a 'More Steps' button. The 'Next Steps' section contains the text: 'No next steps. To get things moving, add a task or set up a meeting.' Below this is a 'Past Activity' section with a 'Load More Past Activities' dropdown menu. The 'Past Activity' section contains the text: 'No past activity. Past meetings and tasks marked as done show up here.' At the bottom of the 'ACTIVITY' section is an 'Activity Lists' section with an 'Add List' button.

DETAILS	RELATED
Log Number LOG-00054	Owner OPS Head Office Manager
Status Pending	Type Other
Start 11/06/2018 10:00 AM	Franchise FCS Bondi Beach
End 12/06/2018 4:00 PM	Organiser OPS Compliance Manager
▼ Reminder Details	
Send Email Reminder <input checked="" type="checkbox"/>	Send Email Reminder Date 7/06/2018 12:00 PM
▼ System Information	
Created By OPS Head Office Manager, 23/05/2018 10:32 AM	Last Modified By OPS Head Office Manager, 23/05/2018 10:32 AM
Currency Australian Dollar	Record Type Field Audit

# 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.

The screenshot displays a Salesforce interface for a Business Review record. At the top, there is a navigation bar with a search box and various utility icons. Below the navigation bar, the record details are shown in a table format:

Record Type	Organiser	Business Review Completed By	Start	End	Status
Business Review	<a href="#">OPS Compliance Manager</a>	<a href="#">OPS Compliance Manager</a>	28/05/2018 12:00 PM	31/05/2018 12:00 PM	Confirmed

Below the table, the record is divided into two main sections: **DETAILS** and **ACTIVITY**.

**DETAILS** section includes:

- Log Number:** LOG-00051
- Status:** Confirmed
- Start:** 28/05/2018 12:00 PM
- End:** 31/05/2018 12:00 PM
- Organiser:** [OPS Compliance Manager](#)
- Owner:** [OPS Head Office Manager](#)
- Franchise:** [FCS Coogee](#)
- Business Review Completed By:** [OPS Compliance Manager](#)
- Next Business Review Date:** 1/11/2018
- Reminder Details:** Send Email Reminder (checked), Send Email Reminder Date: 24/05/2018 12:00 PM
- Attendee Summary:** Number of Attendees: 2, Number of Apologies: 0
- System Information:** Created By: [OPS Head Office Manager](#), 21/05/2018 3:14 PM; Last Modified By: [OPS Head Office Manager](#), 23/05/2018 10:23 AM; Currency: Australian Dollar; Record Type: Business Review

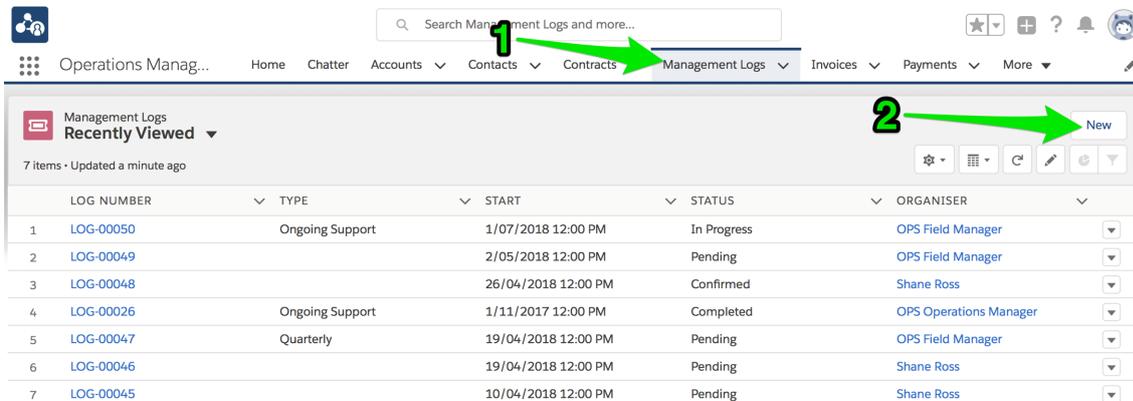
**ACTIVITY** section includes:

- Log a Call:** New Event, New Task, More
- Activity Timeline:** Expand All
- Next Steps:** More Steps
- Past Activity:** Load More Past Activities
- Activity Lists:** Add List

# How to create a management log entry

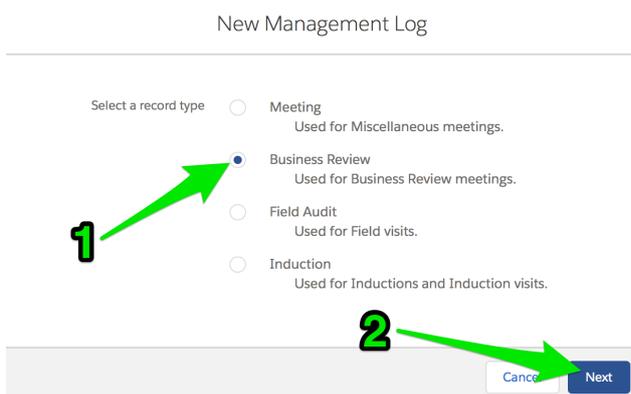
To create a management log entry

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



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.

New Management Log: Business Review

**Information**

<p>Log Number</p> <p>* Status  <input type="text" value="Pending"/></p> <p>* Start  Date: <input type="text" value="13/05/2018"/> Time: <input type="text" value="12:00 PM"/></p> <p>* End  Date: <input type="text" value="25/05/2018"/> Time: <input type="text" value="12:00 PM"/></p> <p>* Organiser  <input type="text" value="OPS Compliance Manager"/></p>	<p>Owner  <b>OPS Head Office Manager</b></p> <p>Franchise  <input type="text" value="FCS Coogee"/></p> <p>Business Review Completed By  <input type="text" value="OPS Compliance Manager"/></p> <p>Next Business Review Date  <input type="text" value="1/11/2018"/></p>
---	--

**Reminder Details**

<p>Send Email Reminder  <input type="checkbox"/></p>	<p>Send Email Reminder Date  Date: <input type="text"/> Time: <input type="text"/></p>
--	--

**System Information**

<p>Currency  <input type="text" value="Australian Dollar"/></p>	<p>Record Type  <b>Business Review</b></p>
---	--

The Management Log entry displays.

Operations Manag...

★ + ? 🔔 👤

Home Chatter Accounts Contacts Contracts Management Logs Invoices Payments More

Management Log  
LOG-00051

Record Type	Organiser	Business Review Completed By	Start	End	Status
Business Review	<a href="#">OPS Compliance Manager</a>	<a href="#">OPS Compliance Manager</a>	13/05/2018 12:00 PM	25/05/2018 12:00 PM	Pending

DETAILS
RELATED

Log Number LOG-00051	Owner <a href="#">OPS Head Office Manager</a>
Status Pending	Franchise <a href="#">FCS Coogee</a>
Start 13/05/2018 12:00 PM	Business Review Completed By <a href="#">OPS Compliance Manager</a>
End 25/05/2018 12:00 PM	Next Business Review Date 1/11/2018
Organiser <a href="#">OPS Compliance Manager</a>	

▼ **Reminder Details**

Send Email Reminder <input type="checkbox"/>	Send Email Reminder Date <input type="text"/>
---	--

▼ **Attendee Summary**

Number of Attendees 0	Number of Apologies 0
--------------------------	--------------------------

ACTIVITY
CHATTER

Log a Call
New Event
New Task
More

**Activity Timeline** ▼ ↺ Expand All

**Next Steps** More Steps

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

**Past Activity** More Steps

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

▼

CHAPTER 6 | How to create a management log entry

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# 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.

The screenshot displays the 'Management Log' interface for entry LOG-00026. At the top, there is a search bar and navigation tabs including Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, and Payments. The main header shows the log title 'Management Log LOG-00026' with actions like Follow, Edit, Clone, and Delete. Below this is a table with columns for Record Type, Type, Organiser, Start, End, and Status. The entry details are: Meeting, Ongoing Support, OPS Operations Manager, 1/11/2017 12:00 PM, 2/11/2017 12:00 PM, and Completed. The 'DETAILS' section is expanded, showing fields for Log Number, Status, Start, End, and Cell Group. A green arrow points to the 'RELATED' tab. Below the details are sections for 'Reminder Details' (Send Email Reminder, Send Email Reminder Date) and 'Attendee Summary' (Number of Attendees: 0, Number of Apologies: 0). The right-hand side shows the 'ACTIVITY' and 'CHATTER' sections, with 'Log a Call' and 'New Event' options, and an 'Activity Timeline' showing upcoming tasks for 'New Franchisee I...' and 'Issue Operations ...'.

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

The screenshot shows a CRM interface for a Management Log entry. The entry is titled "Management Log LOG-00026" and is categorized as a "Meeting" of type "Ongoing Support" organized by "OPS Operations Manager" on "1/11/2017 12:00 PM" to "2/11/2017 12:00 PM" with a status of "Completed".

The interface is divided into several sections:

- DETAILS**: Shows the log entry details.
- RELATED**: Contains two sections:
  - Attendees (0)**: A section with a "New" button, which is highlighted by a green arrow.
  - Files (0)**: A section with an "Add Files" button and an "Upload Files" button.
- ACTIVITY**: Contains a "Log a Call" section with "New Event", "New Task", and "More" options, and an "Activity Timeline" section with "Next Steps" and "More Steps" options.

The **New Attendee** dialog box appears.

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

New Attendee

---

**Information**

Attendee Number

\* Management Log  
LOG-00026

\* Status  
Apology

\* Contact  
Simon Walker

Apology Reason  
Too busy

**System Information**

Currency  
Australian Dollar

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

The **Attendees** section is updated.

The screenshot shows the Operations Management interface. At the top, there is a search bar and navigation tabs including Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, Payments, and More. The main content area displays a Management Log entry for LOG-00026, which is a Meeting of type Ongoing Support, organized by OPS Operations Manager, starting on 1/11/2017 at 12:00 PM and ending on 2/11/2017 at 12:00 PM, with a status of Completed. Below this, the 'RELATED' section shows a table of attendees. The first row is highlighted with a green border and contains the following data: ATT-000012, Walker, Simon, and Apology. To the right, the 'ACTIVITY' section shows a 'Log a Call' button and a list of next steps, including 'New Franchisee I...' and 'Issue Operations ...'.

ATTENDEE	ATTENDEE ...	LAST NAME	FIRST NAME	STATUS
ATT-000012	Walker	Simon	Apology	

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

The screenshot displays the 'Management Log' interface for record LOG-00026. The record is a 'Meeting' of type 'Ongoing Support' organized by 'OPS Operations Manager' from 1/11/2017 12:00 PM to 2/11/2017 12:00 PM, with a status of 'Completed'. The 'DETAILS' section includes fields for Log Number, Status, Start, End, and Cell Group. The 'Attendee Summary' section, highlighted with a green border, shows 'Number of Attendees' as 0 and 'Number of Apologies' as 1. The 'ACTIVITY' section on the right shows a timeline of tasks, including 'New Franchisee I...' and 'Issue Operations ...'.

Record Type	Type	Organiser	Start	End	Status
Meeting	Ongoing Support	OPS Operations Manager	1/11/2017 12:00 PM	2/11/2017 12:00 PM	Completed

DETAILS		RELATED
Log Number	LOG-00026	Owner: FCS System Administrator
Status	Completed	Type: Ongoing Support
Start	1/11/2017 12:00 PM	Franchise: FCS Bondi Beach
End	2/11/2017 12:00 PM	Organiser: OPS Operations Manager
Cell Group		
▼ Reminder Details		
Send Email Reminder	<input type="checkbox"/>	Send Email Reminder Date
▼ Attendee Summary		
Number of Attendees	0	Number of Apologies
		1

ACTIVITY		CHATTER
Log a Call   New Event   New Task   More		
Create new... [Add]		
Activity Timeline [Expand All]		
Next Steps [More Steps]		
>	<input type="checkbox"/> New Franchisee I...	11/11/2017
	OPS Field Manager has an upcoming Task	
>	<input type="checkbox"/> Issue Operations ...	11/11/2017
	OPS Operations Manager has an upcoming Task	
Past Activity		

# 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.

The screenshot displays the 'Management Log' interface for entry LOG-00026. The 'RELATED' tab is selected, indicated by a green arrow. The interface is divided into several sections:

- Management Log Summary:** Shows the log number (LOG-00026), record type (Meeting), type (Ongoing Support), organiser (OPS Operations Manager), start/end times (1/11/2017 12:00 PM to 2/11/2017 12:00 PM), and status (Completed).
- DETAILS:** A table of key information:

Log Number	LOG-00026	Owner	FCS System Administrator
Status	Completed	Type	Ongoing Support
Start	1/11/2017 12:00 PM	Franchise	FCS Bondi Beach
End	2/11/2017 12:00 PM	Organiser	OPS Operations Manager
Cell Group			
- Reminder Details:** Includes fields for 'Send Email Reminder' (checkbox) and 'Send Email Reminder Date'.
- Attendee Summary:** Shows 'Number of Attendees' as 0 and 'Number of Apologies' as 0.
- ACTIVITY:** A sidebar containing a 'Log a Call' section with options for 'New Event', 'New Task', and 'More'. Below this is an 'Activity Timeline' and 'Next Steps' section with a 'More Steps' button. The 'Next Steps' list includes:
  - New Franchisee I... 11/11/2017 (OPS Field Manager has an upcoming Task)
  - Issue Operations ... 11/11/2017 (OPS Operations Manager has an upcoming Task)

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

The screenshot shows the Salesforce interface for a Management Log record (LOG-00026). The record details include: Record Type: Meeting; Type: Ongoing Support; Organiser: OPS Operations Manager; Start: 1/11/2017 12:00 PM; End: 2/11/2017 12:00 PM; Status: Completed.

The interface is divided into two main columns. The left column contains sections for Attendees (2), Files (0), and Notes (0). The right column contains sections for Activity and Chatter.

**Attendees (2)**

ATTENDEE: ATTENDEE ...	LAST NAME	FIRST NAME	STATUS
<a href="#">ATT-000012</a>	Walker	Simon	Apology
<a href="#">ATT-000013</a>	Walker	James	Attended

**Files (0)**

Upload Files  
Or drop files

**Notes (0)**

**Activity**

Log a Call | New Event | New Task | More

Create new... **Add**

Activity Timeline **Expand All**

Next Steps **More Steps**

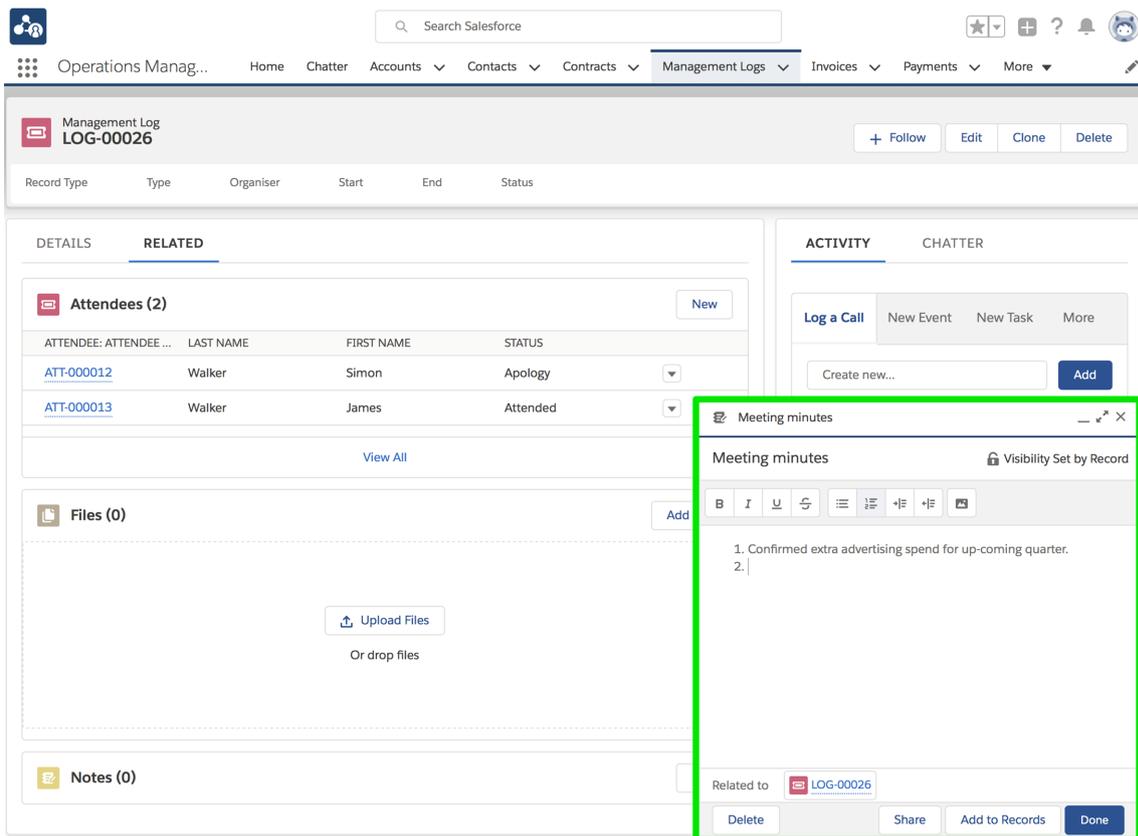
- New Franchisee I... 11/11/2017  
OPS Field Manager has an upcoming Task
- Issue Operations ... 11/11/2017  
OPS Operations Manager has an upcoming Task

Past Activity

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

**Activity Lists** **Add List**

The built-in notes editor displays.



The screenshot shows the Salesforce interface for a Management Log record (LOG-00026). The record details include a table of attendees and a notes editor. The notes editor is open and contains the following text:

Meeting minutes

1. Confirmed extra advertising spend for up-coming quarter.  
2.

The notes editor also includes a toolbar with formatting options (B, I, U, C, list, link, unlink, image) and buttons for Delete, Share, Add to Records, and Done. The record is related to LOG-00026.



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

- When complete, press **Done**.  
The meeting minutes are displayed in the **Notes** section.

# How to record supporting evidence

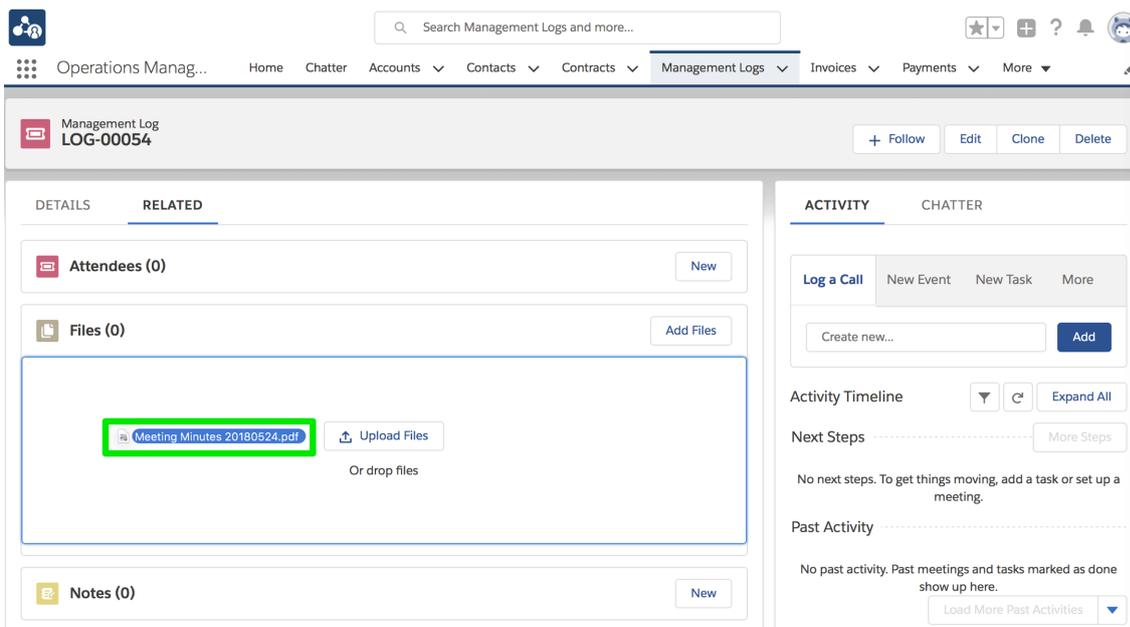
In addition to the four types of management log entries, attendee lists and meeting minutes, it is sometimes necessary to record documents, forms or agreements. You can record this information against any of the Management Log types by creating an attachment to the record.

## To record an attachment

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

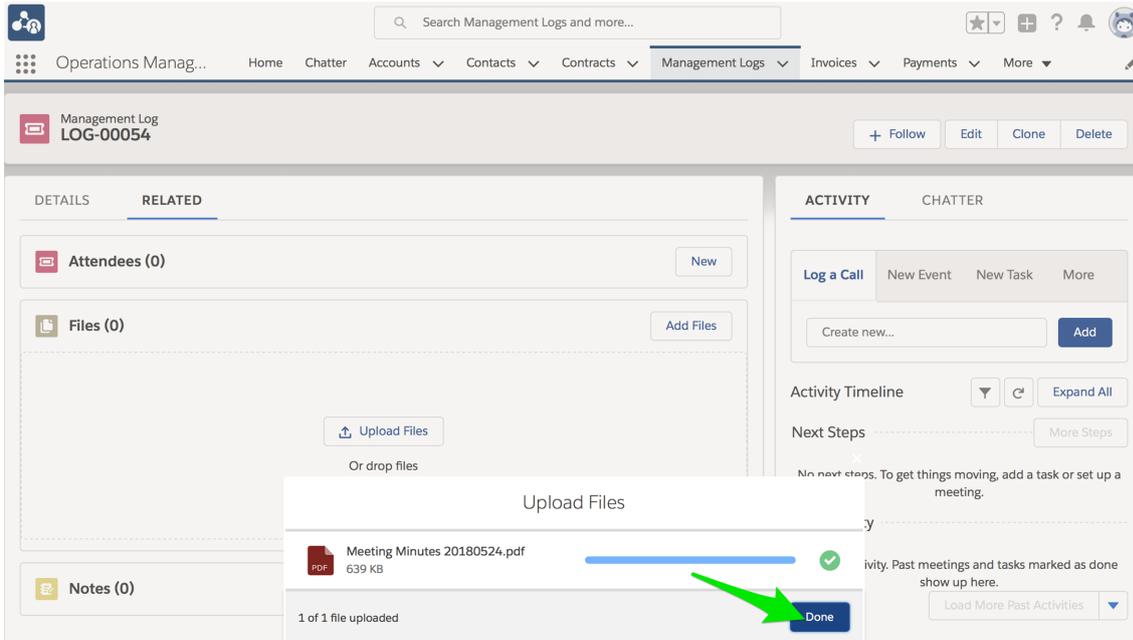
The screenshot shows a web application interface for a Management Log. At the top, there is a navigation bar with a search box and various menu items: Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, Payments, and More. Below the navigation bar, the main content area is titled 'Management Log LOG-00054'. There are buttons for '+ Follow', 'Edit', 'Clone', and 'Delete'. The interface is divided into two main sections: 'DETAILS' and 'RELATED'. The 'RELATED' tab is selected and highlighted with a green arrow. Under the 'RELATED' tab, there are three sections: 'Attendees (0)', 'Files (0)', and 'Notes (0)'. The 'Files (0)' section is highlighted with a green border and contains an 'Add Files' button and an 'Upload Files' button with the text 'Or drop files'. To the right of the 'RELATED' section, there is an 'ACTIVITY' section with a 'Log a Call' button and options for 'New Event' and 'New Task'. Below this, there is an 'Activity Timeline' section with a dropdown menu and an 'Expand All' button. The 'Next Steps' section shows 'No next steps. To get things moving, add a task or set up a meeting.' and the 'Past Activity' section shows 'No past activity. Past meetings and tasks marked as done show up here.' with a 'Load More Past Activities' button.

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

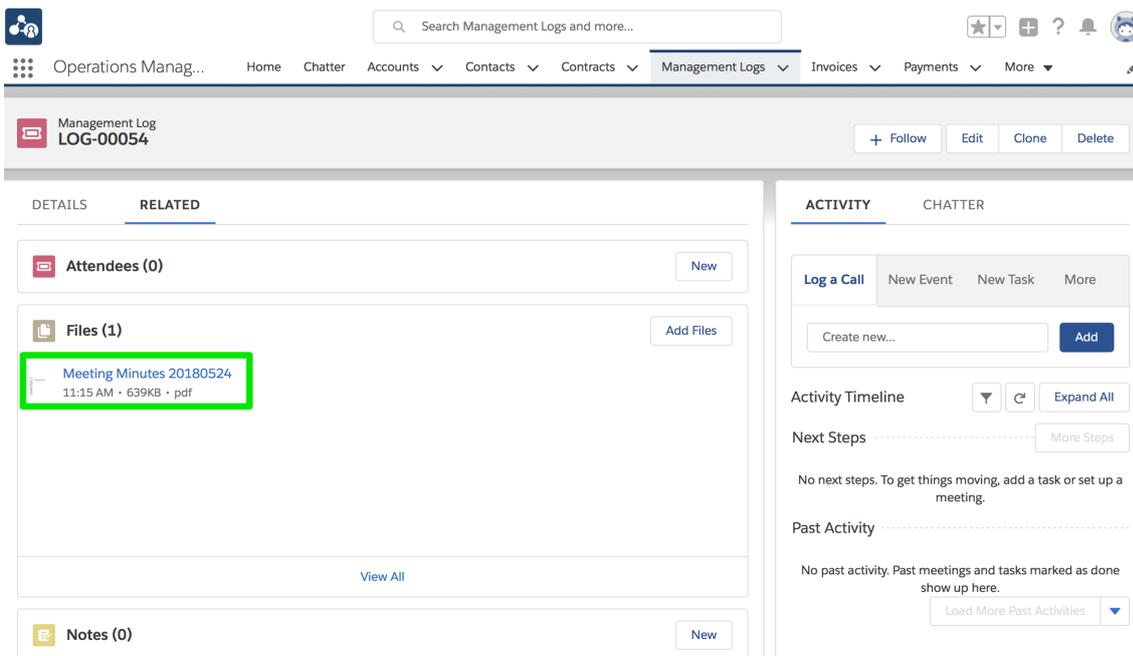


The **Upload Files** dialog box appears.

### 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.

The screenshot shows the Salesforce Management Logs interface. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. The main content area is titled 'Management Logs for Franchise' and shows a table with 4 items. A filter configuration window is open, showing the following settings:

LOG NUMB...	FRANCHISE	RECORD TYPE	START	STATUS	NEXT BUSINE...
1	LOG-00002	FCS Bondi Beach	Induction	9/10/2027	10/01/2027
2	LOG-00020	FCS Bondi Beach	Induction	30/10/2027	11/01/2027
3	LOG-00026	FCS Bondi Beach	Meeting	1/11/2027	02/11/2027
4	LOG-00052	FCS Bondi Beach	Business Review	13/05/2028	14/05/2028

The filter configuration window shows the following settings:

- Field: Franchise
- Operator: equals
- Value: FCS Bondi Beach

The filter configuration window also shows a 'Done' button. The 'Filters' panel on the right shows the filter configuration: 'Show me All management logs', 'Matching all of these filters', 'Franchise equals FCS Bondi Beach', 'Add Filter', 'Remove All', and 'Add Filter Logic'.



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





# CHAPTER 7

## Working with Audits

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# Understanding audits

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

Audits are typically used to

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

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

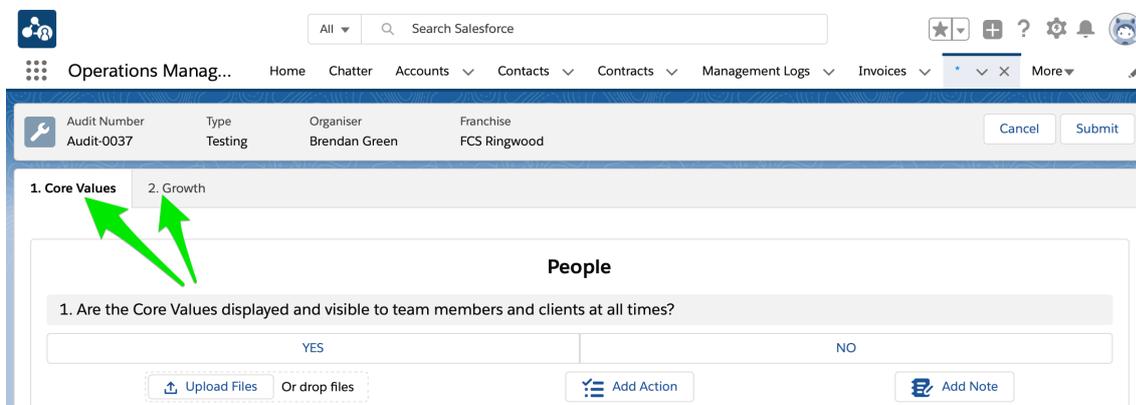
- » Binary answers: Yes or No | Pass or Fail | True or False
- » Scaled answers (0-n)
- » Worded responses selected from a defined set
- » Not applicable (N/A)

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

## How audits appear to end users

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

- » Questions can be grouped by tabs.



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

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

The screenshot shows a Salesforce interface for an audit. At the top, there's a search bar and navigation tabs. Below that, a header bar contains 'Audit Number: Audit-0037', 'Type: Testing', 'Organiser: Brendan Green', and 'Franchise: FCS Ringwood'. The main content area has two tabs: '1. Core Values' and '2. Growth'. A progress bar is visible above the question, with a blue circle indicating the current position. The question is '7. Are Performance Management tools implemented and utilised?'. Below the question are 'YES' and 'NO' radio buttons, and buttons for 'Upload Files', 'Add Action', and 'Add Note'.

» One or more questions can display on each page.

The screenshot shows a Salesforce interface for an audit, similar to the previous one. The header bar is the same. The main content area has two tabs: '1. Core Values' and '2. Growth'. A progress bar is visible above the questions, with a blue circle indicating the current position. The section is titled 'Human Resources'. There are three questions displayed on the page: '4. Is there an emergency contact on file for all employees?', '5. Is there a procedure in place for internal complaints including bullying and harassment claims?', and '6. Are the current minimum wages and approved allowances on file and updated as required?'. Each question has 'YES' and 'NO' radio buttons, and buttons for 'Upload Files', 'Add Action', and 'Add Note'. At the bottom of the form, there are 'Previous' and 'Next' buttons.

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

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

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

### Human Resources

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

YES NO

Upload Files Or drop files Add Action Add Note

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

YES NO

Upload Files Or drop files Add Action Add Note

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

YES NO

Upload Files Or drop files Add Action Add Note

Previous Next

» Actions arising from the observation can be created.

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

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

### Human Resources

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

YES NO

Upload Files Or drop files Add Action Add Note

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

YES NO

Upload Files Or drop files Add Action Add Note

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

YES NO

Upload Files Or drop files Add Action Add Note

Previous Next

» When complete, the user submits the audit.

The screenshot shows a Salesforce interface for an audit. At the top, there is a navigation bar with 'Operations Manag...' and various menu items like 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', and 'More'. A search bar for 'Salesforce' is also present. Below the navigation bar, the audit details are displayed: 'Audit Number: Audit-0037', 'Type: Testing', 'Organiser: Brendan Green', and 'Franchise: FCS Ringwood'. On the right side of this header, there are 'Cancel' and 'Submit' buttons. A green arrow points to the 'Submit' button. The main content area is titled 'Technology' and contains two questions:

**10. What technology solutions are in place? And what are the strengths and weaknesses of each system?**

Below this question, there are two columns: 'YES' and 'NO'. Under 'YES', there is an 'Upload Files' button and the text 'Or drop files'. Under 'NO', there is an 'Add Action' button and an 'Add Note' button.

**11. Are all technology systems integrated and working as an end to end system?**

Below this question, there are two columns: 'YES' and 'NO'. Under 'YES', there is an 'Upload Files' button and the text 'Or drop files'. Under 'NO', there is an 'Add Action' button and an 'Add Note' button.

At the bottom left of the form, there is a 'Previous' button.

# 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

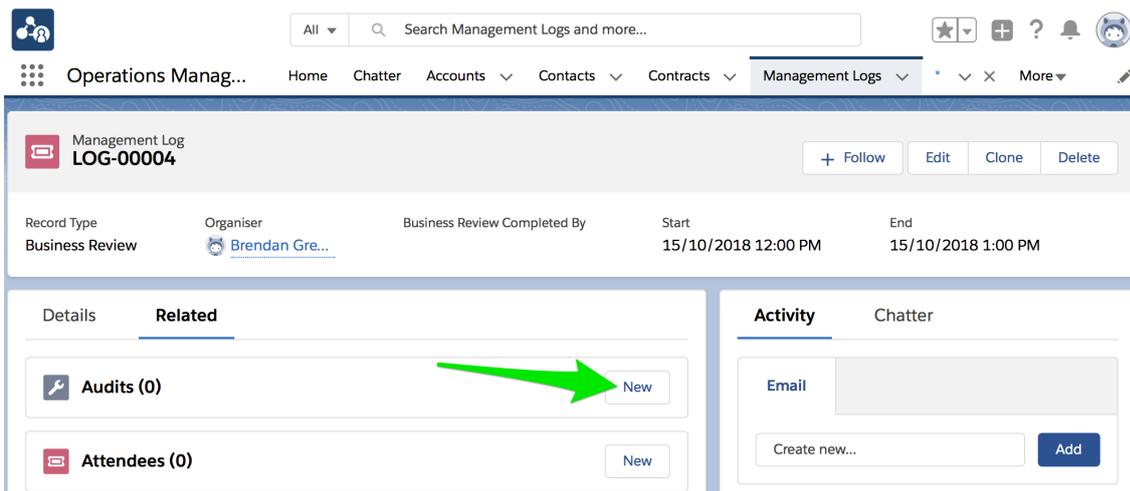
1. From the Management Log, select the **Related** tab.

The screenshot shows the 'Management Log' interface for record 'LOG-00004'. The record details are as follows:

Record Type	Organiser	Business Review Completed By	Start	End
Business Review	<a href="#">Brendan Gre...</a>		15/10/2018 12:00 PM	15/10/2018 1:00 PM

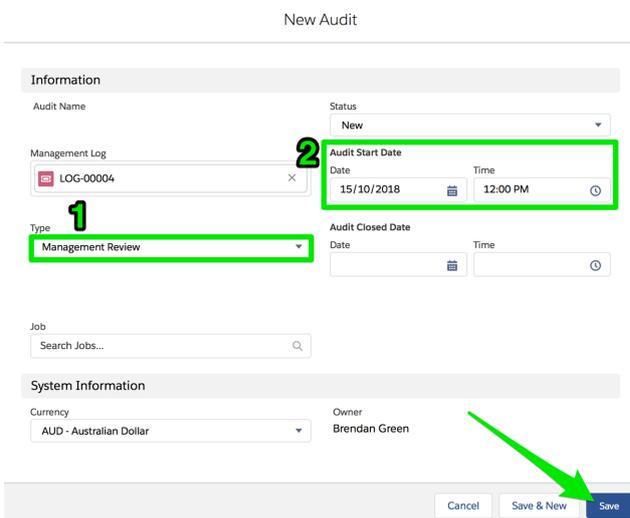
The interface includes tabs for 'Details' and 'Related', with a green arrow pointing to the 'Related' tab. Other visible elements include the 'Activity' tab, an 'Email' section with a 'Create new...' button, and a 'Next Steps' section with a 'More Steps' button.

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.

The screenshot displays the 'Management Log' interface for record 'LOG-00004'. The record type is 'Business Review', organized by 'Brendan Gre...'. The start and end dates are '15/10/2018 12:00 PM' and '15/10/2018 1:00 PM' respectively. The interface is divided into 'Details' and 'Related' sections. The 'Related' section contains a table of audits:

AUDIT NAME	AUDIT START DATE	AUDIT CLOSED D...	STATUS
<a href="#">Audit-0028</a>	15/10/2018 12:0...		New

A green arrow points to the 'Audit-0028' link. To the right, the 'Activity' section shows an 'Email' input field and a 'Create new...' button. At the bottom right, there are 'Refresh' and 'Expand All' options.

# How to complete an audit on desktop

To complete an audit on a desktop

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

The screenshot shows the Salesforce interface for an audit. At the top, there's a navigation bar with 'Operations Manag...' and various menu items like Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, Payments, and More. Below this is the audit header for 'Audit-0029'. A green arrow points to the 'Start Audit' button. Other buttons include 'Submit for Approval' and 'Edit'. The main content area is split into 'Details' and 'Activity' tabs. The 'Details' tab shows fields for Audit Name, Status (New), Management Log (LOG-00004), Type (Management Review), Job, Currency (AUD - Australian Dollar), Last Modified By (Brendan Green), and Owner (Brendan Green). The 'Activity' tab shows filters and next steps.

2. On any given page, answer each question.

The screenshot shows the 'People' section of the audit completion page. It has a header with 'Audit Number: Audit-0029', 'Type: Testing', 'Organiser: Brendan Green', and 'Franchise: FCS Ringwood'. There are 'Cancel' and 'Submit' buttons. Below the header, there are two tabs: '1. Core Values' and '2. Growth'. The 'Core Values' section contains three questions, each with a 'YES' and 'NO' radio button. The 'YES' buttons are highlighted with green numbers 1, 2, and 3. Each question also has 'Upload Files', 'Or drop files', 'Add Action', and 'Add Note' options. A 'Next' button is at the bottom right.

**People**

1. Are staff recognised and rewarded for practicing the core vales? **1**

2. Are the Core Values displayed and visible to team members and clients at all times? **2**

3. Do all team members practice core values via everyday activities? **3**

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

The screenshot shows a Salesforce interface for 'Operations Management'. At the top, there is a search bar and navigation tabs for Home, Chatter, Accounts, Contacts, Contracts, and Management Logs. Below this is a header section with fields for 'Audit Number' (Audit-0029), 'Type' (Testing), 'Organiser' (Brendan Green), and 'Franchise' (FCS Ringwood). There are 'Cancel' and 'Submit' buttons on the right. The main content area is titled 'People' and contains three questions:

- 1. Are staff recognised and rewarded for practicing the core vales? (YES selected)
- 2. Are the Core Values displayed and visible to team members and clients at all times? (YES selected)
- 3. Do all team members practice core values via everyday activities? (YES selected)

Each question has a progress bar, 'Upload Files' and 'Or drop files' buttons, and 'Add Action' and 'Add Note' buttons. A green arrow points to the 'Next' button at the bottom right of the form.

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

The screenshot shows a Salesforce interface for an audit. At the top, there's a navigation bar with 'Operations Manag...' and various menu items like 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', and 'More'. Below this, a header bar displays 'Audit Number: Audit-0029', 'Type: Testing', 'Organiser: Brendan Green', and 'Franchise: FCS Ringwood'. There are 'Cancel' and 'Submit' buttons on the right. A progress indicator shows two tabs: '1. Core Values' and '2. Growth', with the second tab highlighted in green. The main content area is titled 'Human Resources' and contains three questions:

- Question 4: 'Is there a procedure in place for internal complaints including bullying and harassment claims?' The 'YES' radio button is selected, and a green '1' is next to it.
- Question 5: 'Is there an emergency contact on file for all employees?' The 'YES' radio button is selected, and a green '2' is next to it.
- Question 6: 'Are the current minimum wages and approved allowances on file and updated as required?' The 'YES' radio button is selected, and a green '3' is next to it.

Each question has a 'YES' radio button, a 'NO' radio button, and buttons for 'Upload Files', 'Or drop files', 'Add Action', and 'Add Note'. At the bottom left is a 'Previous' button, and at the bottom right is a 'Next' button, which is highlighted with a green arrow.



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.

The screenshot shows the Salesforce Operations Management interface. At the top, there is a navigation bar with 'Operations Manag...' and various menu items like Home, Chatter, Accounts, Contacts, Contracts, and Management Logs. Below this is a header for the current audit, showing 'Audit Number: Audit-0029', 'Type: Testing', 'Organiser: Brendan Green', and 'Franchise: FCS Ringwood'. There are 'Cancel' and 'Submit' buttons. The main content area has two tabs: '1. Core Values' and '2. Growth'. A progress bar is visible, with a blue circle indicating the current position. Below the progress bar is a section titled 'Performance Management' containing three questions:

- 7. Does the office further enhance the internal client experience? If so how?  
YES NO  
Upload Files Or drop files Add Action Add Note
- 8. Are Performance Management tools implemented and utilised?  
YES NO  
Upload Files Or drop files Add Action Add Note
- 9. Do all team members take pride in their appearance and make every effort to represent the brand to the highest level?  
YES NO  
Upload Files Or drop files Add Action Add Note

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

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**.

The screenshot shows the Salesforce interface for an audit. At the top, there's a navigation bar with 'Operations Manag...' and various menu items like 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', and 'More'. Below this, the audit details are shown: Audit Number 'Audit-0029', Type 'Testing', Organiser 'Brendan Green', and Franchise 'FCS Ringwood'. There are 'Cancel' and 'Submit' buttons in the top right. The main content area is titled 'Technology' and contains two questions: '10. Are all technology systems integrated and working as an end to end system?' and '11. What technology solutions are in place? And what are the strengths and weaknesses of each system?'. Both questions have 'YES' and 'NO' radio buttons, and options to 'Upload Files', 'Add Action', and 'Add Note'. A green arrow points to the 'Submit' button.

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

Submit Audit

You are about to submit the audit. Please make sure you have answered all questions and necessary attachments and/or actions.

The screenshot shows a confirmation dialog box with a light gray background. At the bottom, there are two buttons: 'Cancel' and 'Submit'.

9. The Audit is now completed.

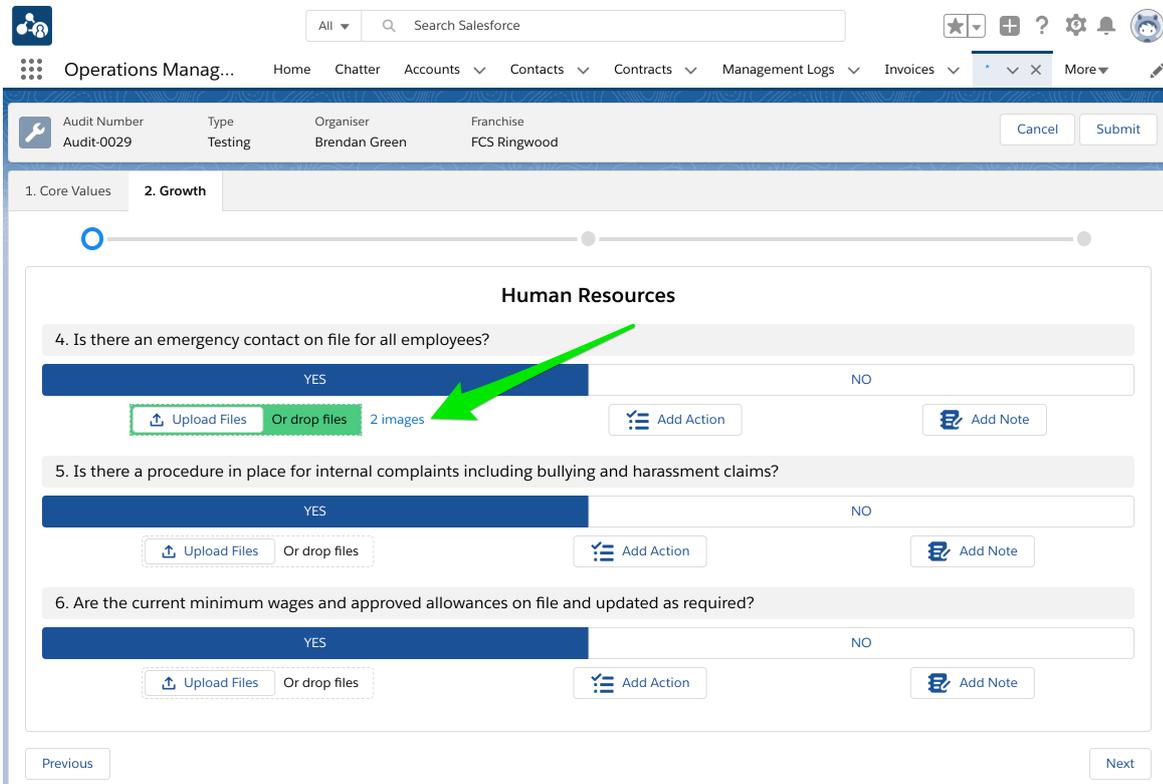
The screenshot shows the Salesforce record page for 'Audit-0029'. The page has a header with 'Audit-0029' and buttons for 'Start Audit', 'Submit for Approval', and 'Edit'. Below the header, there are two main sections: 'Details' and 'Activity'. The 'Details' section is a table with the following data:

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

The 'Status' field is highlighted with a green border. The 'Activity' section on the right shows filters for 'All time', 'All activities', and 'All types', and a 'Refresh' button. Below that, there are sections for 'Next Steps' and 'Past Activities', both showing no activity.

# How to work with attachments that are not images

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

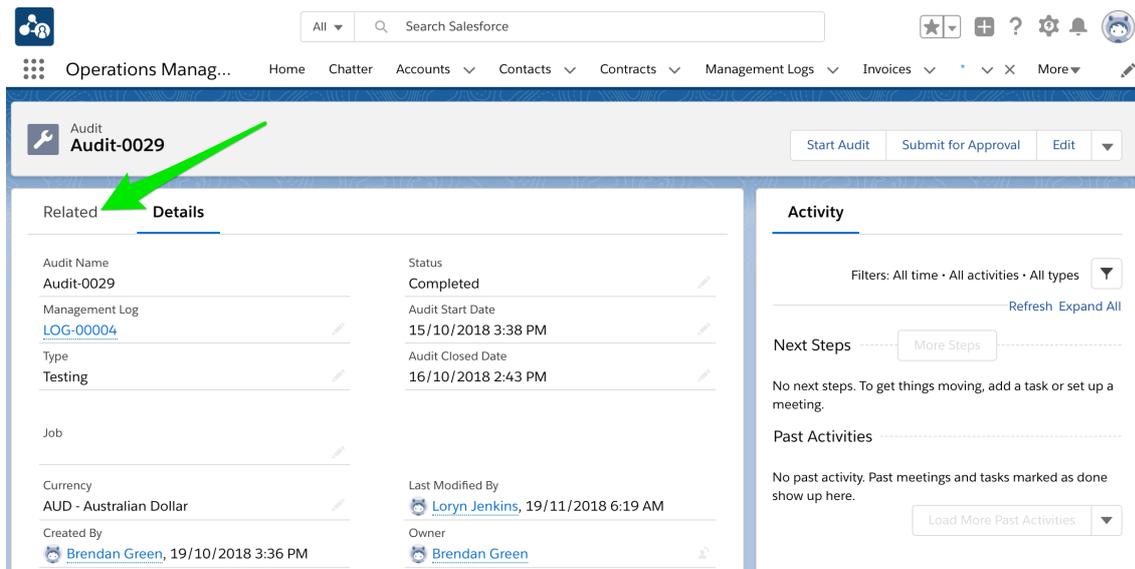


The screenshot shows a Salesforce interface for an audit form. At the top, there is a navigation bar with 'Operations Manag...' and a search bar. Below this, the form header includes 'Audit Number: Audit-0029', 'Type: Testing', 'Organiser: Brendan Green', and 'Franchise: FCS Ringwood'. The main content area is titled 'Human Resources' and contains three questions. The first question is '4. Is there an emergency contact on file for all employees?'. Below this question, there is a 'YES' button that is selected, and a 'NO' button. To the right of the 'YES' button, there is a file upload section with the text '2 images' and a green arrow pointing to it. Below the '2 images' text, there are buttons for 'Upload Files', 'Or drop files', 'Add Action', and 'Add Note'. The second question is '5. Is there a procedure in place for internal complaints including bullying and harassment claims?'. Below this question, there is a 'YES' button that is selected, and a 'NO' button. To the right of the 'YES' button, there is a file upload section with the text 'Or drop files' and buttons for 'Upload Files', 'Add Action', and 'Add Note'. The third question is '6. Are the current minimum wages and approved allowances on file and updated as required?'. Below this question, there is a 'YES' button that is selected, and a 'NO' button. To the right of the 'YES' button, there is a file upload section with the text 'Or drop files' and buttons for 'Upload Files', 'Add Action', and 'Add Note'. At the bottom of the form, there are 'Previous' and 'Next' buttons.

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

## To locate non-image attachments

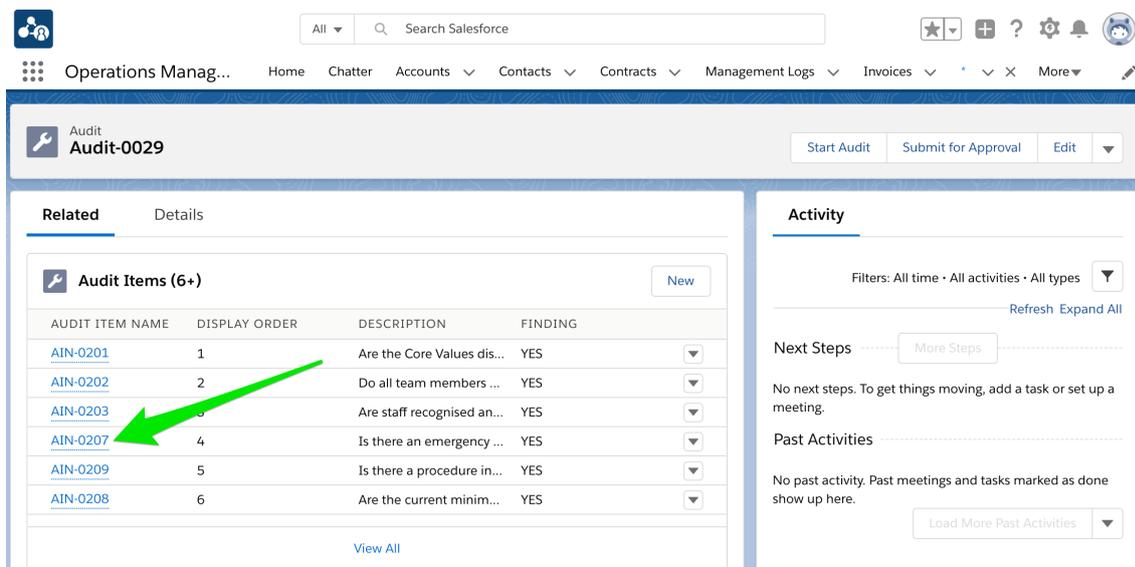
### 1. From the Audit record, selected Related.



The screenshot shows the Salesforce interface for an Audit record named "Audit-0029". The "Related" tab is selected, displaying a list of related records. A green arrow points to the "Related" tab label. The "Activity" tab is also visible on the right.

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

### 2. Select an Audit Item.



The screenshot shows the Salesforce interface for the same Audit record "Audit-0029". The "Related" tab is selected, displaying a list of "Audit Items (6+)". A green arrow points to the "AIN-0207" item in the list. The "Activity" tab is also visible on the right.

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

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

The screenshot shows the Salesforce interface for an Audit Item named AIN-0207. The 'Related' tab is selected and highlighted with a green arrow. The 'Details' section shows the following information:

Audit Item Name	AIN-0207	Currency	AUD - Australian Dollar
Audit	<a href="#">Audit-0029</a>	Finding	YES
Display Order	4	Description	Is there an emergency contact on file for all employees?
Category	2. Growth	Notes	
Section	Human Resources		
Created By	<a href="#">Brendan Green</a> , 19/10/2018 3:36 PM	Last Modified By	<a href="#">Loryn Jenkins</a> , 19/11/2018 6:19 AM

The 'Activity' section on the right shows filters for 'All time', 'All activities', and 'All types'. It also includes sections for 'Next Steps' and 'Past Activities', both of which are currently empty.

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

The screenshot shows the 'Notes & Attachments' section of the Audit Item AIN-0207. A green arrow points to the 'View All' link at the bottom of the list. The list contains two items:

- Employee-Emergency-Contact-Form-Signed (19/11/2018 · 224KB · png)
- Employee-Emergency-Contact-Form (19/11/2018 · 32KB · pdf)

The 'Activity' section on the right is visible but not the focus of this step.

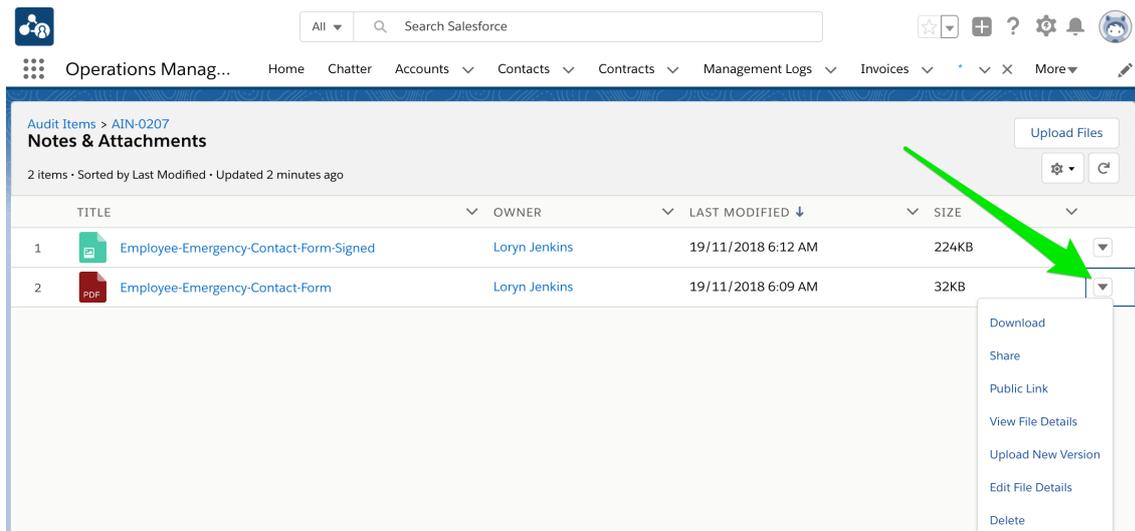
5. You can now view all the files attached to the question.

The screenshot shows the 'Notes & Attachments' list for Audit Item AIN-0207. The list is sorted by 'Last Modified' and contains two items:

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

## To edit any of the attachments

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



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

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

A green arrow points to the dropdown menu icon for the second attachment. The context menu is open, showing options: Download, Share, Public Link, View File Details, Upload New Version, Edit File Details, and Delete.

# 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.	<p>&lt;p&gt;&lt;b&gt;Check:&lt;/b&gt;&lt;/p&gt; &lt;ul&gt; &lt;li&gt;Current health and safety cert is filed for each employee.&lt;/li&gt; &lt;/ul&gt;</p>
Possible_Findings__c	A pipe-delimited string describing the set of possible answers. Each sub-string is displayed on its own button. See below for the syntax for this column.	N/A   No   Yes
Pass_Finding__c	Optional criteria to determine whether this finding is a pass or fail. Questions pass by default.	8
Category__c	Determines the name of the tab on which the question is displayed. All questions belonging to a category are displayed on the same tab. Tabs appear in alphabetical order.	People

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



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



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



If you add a new Type to the spreadsheet, you will need to configure a new audit type (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.

New Audit: General

Information

Audit Name

Status  
New

Management Log  
Search Management Logs...

Audit Start Date  
Date Time

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

Audit Closed Date  
Date Time

Job  
JN-00102

System Information

Currency  
AUD - Australian Dollar

Owner  
Loryn Jenkins

Cancel Save & New Save

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

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

Cancel Submit

People

Health & Safety

4. All employees possess current health and safety certificates?

Yes	No	N/A

Upload Files Or drop files Add Action

Previous Next



# CHAPTER 8

## Working with Expenses

Understanding expenses .....	220
How to enter an expense .....	221

# 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*.



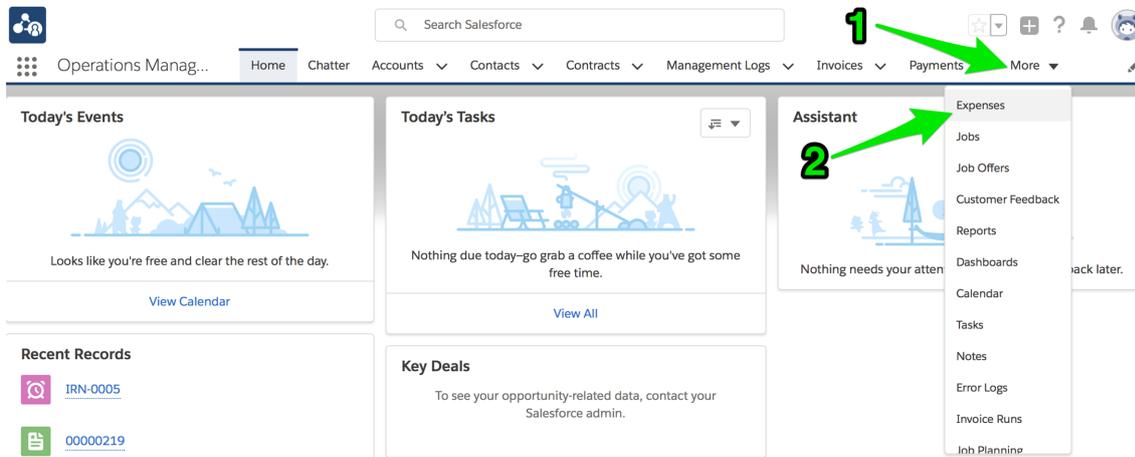
Expenses can really lower the communications overhead between the management team and the finance team.

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

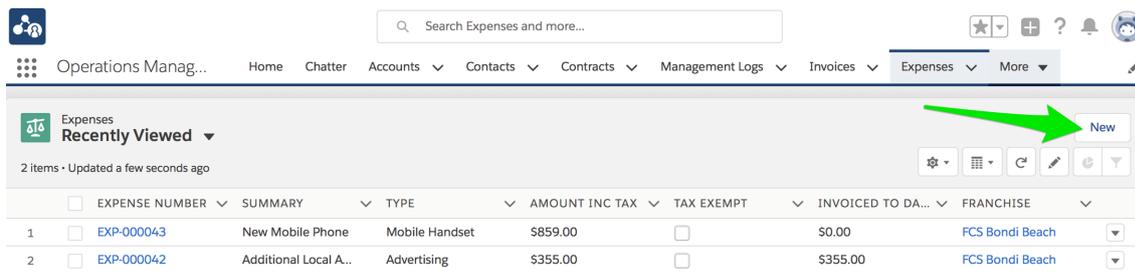
To create a new expense

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.

New Expense

---

**Information**

Expense Number

Owner  
OPS Finance Manager

\* Summary  
Mobile handset

\* Franchise  
Search Accounts...

\* Type  
--None--

Supplier  
Search Accounts...

\* Date

\* Instalments  
1

\* Amount Inc Tax

Tax Exempt

**System Information**

Currency  
Australian Dollar

Cancel Save & New Save

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

New Expense

---

**Information**

Expense Number

Owner  
OPS Finance Manager

\* Summary  
Mobile handset

\* Franchise  
Coo

\* Type  
--None--

Supplier

\* Date

\* Instalments

\* Amount Inc Tax

Tax Exempt

**System Information**

Currency  
Australian Dollar

Cancel Save & New Save

5. Select the expense Type.

New Expense

---

**Information**

Expense Number

Owner  
OPS Finance Manager

\* Summary  
Mobile handset

\* Franchise  
FCS Coogee

\* Type  
Mobile Handset

Supplier  
Search Accounts...

\* Instalments  
1

--None--  
Advertising  
Business Cards  
Mobile Bill Charges  
✓ Mobile Handset  
Vehicle Signage  
Other

Australian Dollar

Cancel Save & New Save

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.

New Expense

---

**Information**

Expense Number

Owner  
OPS Finance Manager

\* Summary  
Mobile handset

\* Franchise  
FCS Coogee

\* Type  
Mobile Handset

Supplier  
Search Accounts...

\* Date  
4/05/2018

\* Instalments  
2

\* Amount Inc Tax  
850.00

Tax Exempt

**System Information**

Currency  
Australian Dollar

Cancel Save & New **Save**

Operations Management displays the newly created Expense record.

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

Expense **Mobile handset** Edit Delete Clone

Type	Amount Inc Tax	Date	Franchise	Instalments
Mobile Handset	\$850.00	4/05/2018	FCS Coogee	2

**DETAILS** RELATED

Expense Number EXP-000044	Owner OPS Finance Manager
Summary Mobile handset	Franchise FCS Coogee
Type Mobile Handset	Supplier
Date 4/05/2018	Invoiced To Date \$0.00
Amount Inc Tax \$850.00	Expense Item Total Amount Inc Tax \$850.00
Tax Exempt <input type="checkbox"/>	Instalments 2

## To see when an expense will become payable

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

The screenshot shows the 'Expense Mobile handset' page in a software interface. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Expenses', and 'More'. A search bar is located at the top center. The main content area displays the expense details for 'Mobile handset' with a total amount of \$850.00, dated 4/05/2018, and 2 instalments. The 'RELATED' tab is selected and highlighted with a green arrow. The details section shows fields for Expense Number (EXP-000044), Owner (OPS Finance Manager), Summary (Mobile handset), Type (Mobile Handset), Date (4/05/2018), Amount Inc Tax (\$850.00), and Tax Exempt (unchecked). It also shows related fields like Franchise (FCS Coogee), Supplier, Invoiced To Date (\$0.00), and Expense Item Total Amount Inc Tax (\$850.00).

2. Review the expense lines.

The screenshot shows the 'Expense Mobile handset' page with the 'RELATED' tab selected. Below the main expense details, there is a section titled 'Expense Line Items (2)' with a 'New' button. A table lists the expense line items, with two items highlighted by a green box:

EXPENSE ITEM NUMBER	SUMMARY	AMOUNT INC TAX	TAX EXEMPT	
<a href="#">EIN-000059</a>	Mobile handset - 4/05/...	\$425.00	<input type="checkbox"/>	▼
<a href="#">EIN-000060</a>	Mobile handset - 4/06/...	\$425.00	<input type="checkbox"/>	▼

Below the table, there is a 'View All' link.

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

Expense  
**Mobile handset**

Type: Mobile Handset | Amount Inc Tax: \$850.00 | Date: 4/05/2018 | Franchise: FCS Coogee | Installments: 2

DETAILS | **RELATED**

**Expense Line Items (2)**

EXPENSE ITEM NUMBER	SUMMARY	AMOUNT INC TAX	TAX EXEMPT
<a href="#">EIN-000059</a>	Mobile handset - 4/05/...	\$425.00	<input type="checkbox"/>
<a href="#">EIN-000060</a>	Mobile handset - 4/06/...	\$425.00	<input type="checkbox"/>

[View All](#)

### All Expense Line Items display.

Expenses > EXP-000044  
**Expense Line Items**

2 items - Updated a minute ago

EXPENSE ITEM NUMBER	SUMMARY	AMOUNT INC TAX	TAX EXEMPT	DUE DATE	INVOICED
1 <a href="#">EIN-000059</a>	Mobile handset - 4/05/20...	\$425.00	<input type="checkbox"/>	4/05/2018	<input type="checkbox"/>
2 <a href="#">EIN-000060</a>	Mobile handset - 4/06/20...	\$425.00	<input type="checkbox"/>	4/06/2018	<input type="checkbox"/>



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

Expenses > EXP-000044  
**Expense Line Items**

2 items - Updated 3 minutes ago

EXPENSE ITEM NUMBER	SUMMARY	AMOUNT INC TAX	TAX EXEMPT	DUE DATE	INVOICED
1 <a href="#">EIN-000059</a>	Mobile handset - 4/05/20...	\$425.00	<input type="checkbox"/>	4/05/2018	<input type="checkbox"/>
2 <a href="#">EIN-000060</a>	Mobile handset - 4/06/20...	\$425.00	<input type="checkbox"/>	4/06/2018	<input type="checkbox"/>

**1** → [Dropdown menu]  
**2** → Edit

# CHAPTER 9

## Working with Suppliers & Supplier Invoices

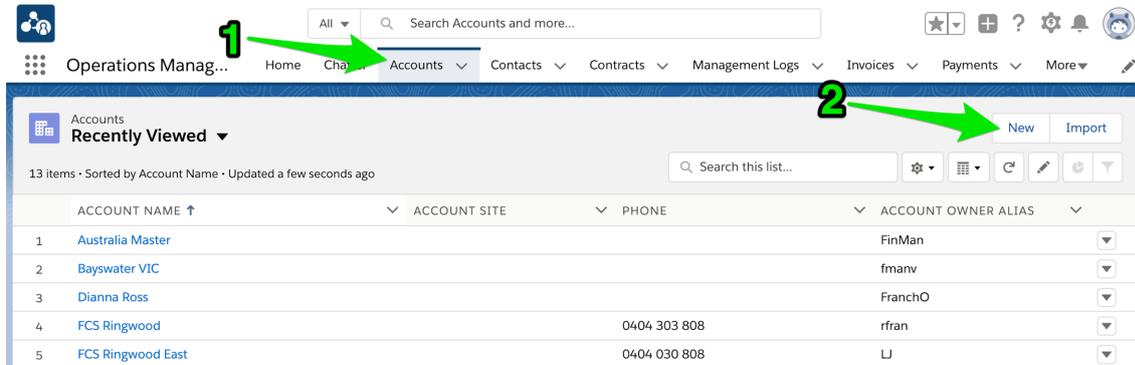
Adding a supplier .....	228
Creating a supplier invoice .....	230

# Adding a supplier

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

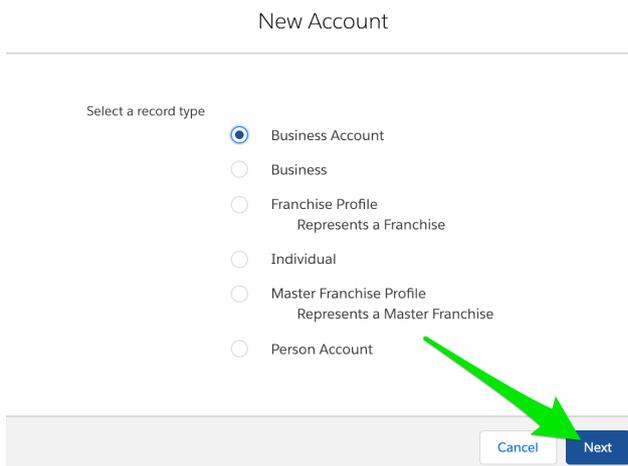
## To add a supplier account

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



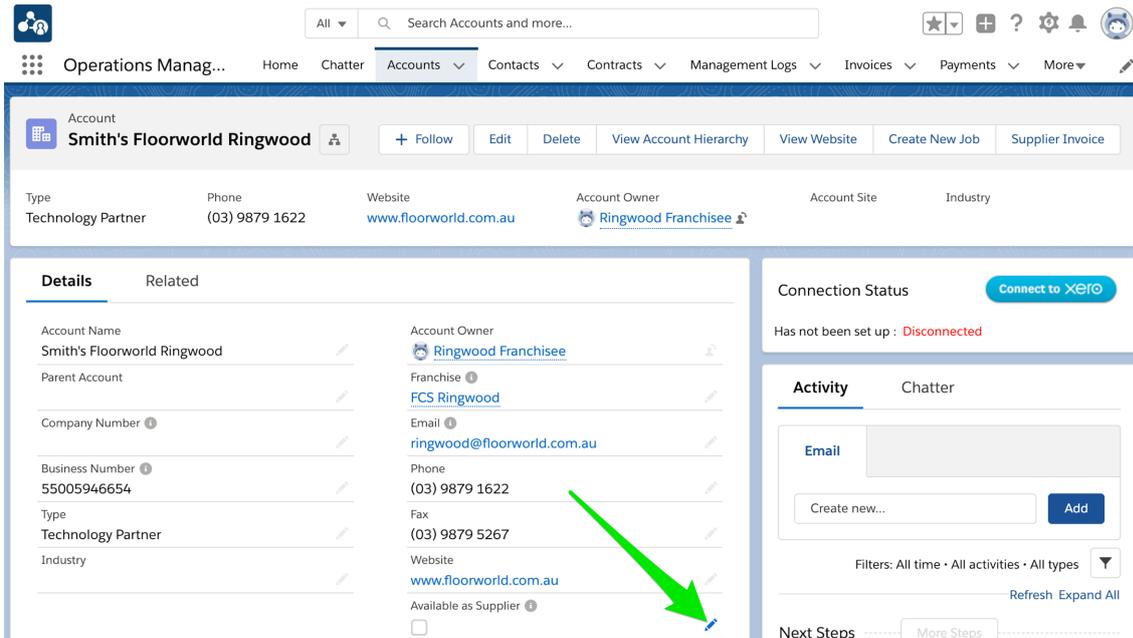
The **New Account** dialog box appears.

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

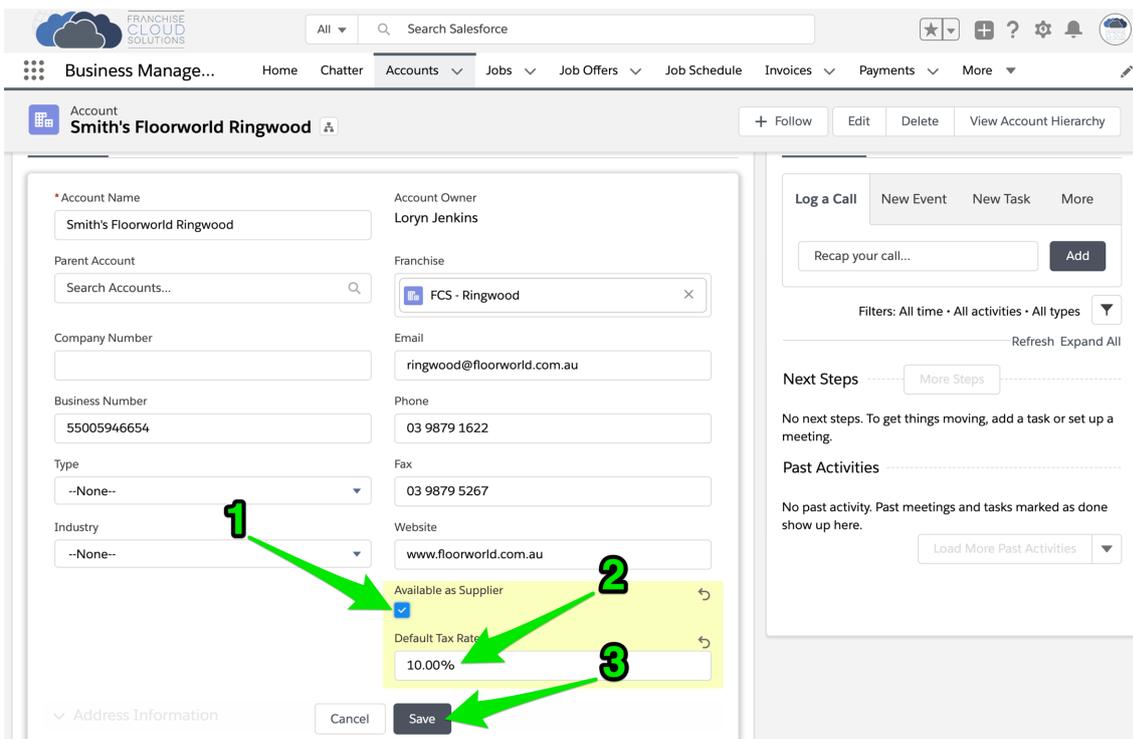


3. Now complete the account creation by entering all relevant details then pressing **Save**.

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 Salesforc Accounts list, select the Business Accounts list view.

Billing State	Billing Postcode	Phone	Account Owner	Owner First Name	Owner Last Name
VIC	3183	0431661077	coffi	OPS	Head Office Manager
VIC	3140	0411628422	Ifran	Lilydale	FranchiseOwner
VIC	3140	0431661077	FO	John	Smith
VIC	3134	0431661077	FO	John	Smith

2. Select the target supplier account.

Account Name	Billing State	Billing Postcode	Phone	Last Job Date	Account Owner Alias	Created Date
Parallel Trades Pty Ltd	NSW	2022	(02) 9389 8988		sadmi	3/10/2017 9:42 AM
Ray White Bexley	NSW	2207			kmile	12/08/2019 9:12 AM
Signarama St Leonards	2065				Jannis	6/10/2017 9:04 AM
Smith's Floorworld Ringwood			03 9879 1622		FO	1/08/2019 4:07 PM
Sydney Electrical Services	NSW	2026	(02) 9389 2797		sadmi	3/10/2017 3:48 PM
Total Tools	NSW				sadmi	3/10/2017 11:18 AM
Trainers Pty Ltd	NSW	2000			Jannis	5/10/2017 3:09 PM

3. From the Account page, press Supplier Invoice.

Account: Smith's Floorworld Ringwood

Buttons: + Follow, Edit, Delete, View Account Hierarchy, Create New Job, **Supplier Invoice**

Details:

Account Name	Smith's Floorworld Ringwood	Account Owner	John Smith
Parent Account		Franchise	FCS - Ringwood
Company Number		Email	ringwood@floorworld.com.au
Business Number	55005946654	Phone	03 9879 1622
Type		Fax	03 9879 5267
Industry		Website	www.floorworld.com.au
		Available as Supplier	<input checked="" type="checkbox"/>
		Default Tax Rate	20.00%

Activity:

Log a Call, New Event, New Task, Email

Recap your call... Add

Filters: All time - All activities - All types

Upcoming & Overdue: No next steps. To get things moving, add a task or set up a meeting. No past activity. Past meetings and tasks marked as done show up here.

The Supplier Invoice dialog box appears.

4. Enter the supplier invoice header details.

Supplier Invoice

*Supplier Invoice Number D8932	Status Open
*Invoice Date 19/11/2019	*Due Date 26/11/2019
Reference D8932A	
Tax Rate (%) 10	Invoice Amount \$0.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	Search Job Q Summary	310	\$0.00	<input checked="" type="checkbox"/>	\$0.00 +

Cancel Generate Invoice

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

Supplier Invoice

*Supplier Invoice Number D8932	Status Open
*Invoice Date 19/11/2019	*Due Date 26/11/2019
Reference D8932A	
Tax Rate (%) 10	Invoice Amount \$56.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	JN-00156 X Grout	310	\$56.00	<input checked="" type="checkbox"/>	\$56.00 +

Cancel Generate Invoice

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

Supplier Invoice

*Supplier Invoice Number D8932	Status Open
*Invoice Date 19/11/2019	*Due Date 26/11/2019
Reference D8932A	
Tax Rate (%) 10	Invoice Amount \$56.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	JN-00156 X Grout	310	\$56.00	<input checked="" type="checkbox"/>	\$56.00 +
2	JN-00156 X Summary	310	\$0.00	<input checked="" type="checkbox"/>	\$0.00 +

Cancel Generate Invoice

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

Supplier Invoice

---

\* Supplier Invoice Number:  Status:

\* Invoice Date:  \* Due Date:

Reference:

Tax Rate (%) 10 Invoice Amount \$3,306.00

JOB	SUMMARY	ACCOUNT CODE	AMOUNT	INCLUDES TAX?	AMOUNT INC TAX
1	<input type="text" value="JN-00156"/> Grout	<input type="text" value="310"/>	<input type="text" value="\$56.00"/>	<input checked="" type="checkbox"/>	\$56.00
2	<input type="text" value="JN-00156"/> Tiles	<input type="text" value="310"/>	<input type="text" value="\$3,250.00"/>	<input checked="" type="checkbox"/>	\$3,250.00

8. The supplier invoice is now generated.

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

Invoice **D8932** + Follow Edit Clone Delete Create Invoice PDF Send to Financial System

Account: [Smith's Floorworld Ringwood](#) Invoice Date: 19/11/2019 Amount Inc Tax: \$3,306.00 Status: Open

Details	Related
Sync Status	Owner: <a href="#">John Smith</a>
Invoice Number: D8932	Amount: \$3,005.4545
Invoice Date: 19/11/2019	Tax Amount: \$300.54
Due Date: 26/11/2019	Amount Inc Tax: \$3,306.00
Type	Tax Exempt: <input type="checkbox"/>
Status: Open	Job
Account: <a href="#">Smith's Floorworld Ringwood</a>	Has been emailed?: <input type="checkbox"/>
Reference: D8932B	Financial System Id: <input type="text"/>

**Activity** Chatter

Log a Call New Event New Task Email

Recap your call...

Filters: All time · All activities · All types

Refresh · Expand All · View All

**Upcoming & Overdue**

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

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



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

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Adding a material .....	237

# Understanding material price lists

Material Price Lists support job costing and estimation.

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

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

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

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

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



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

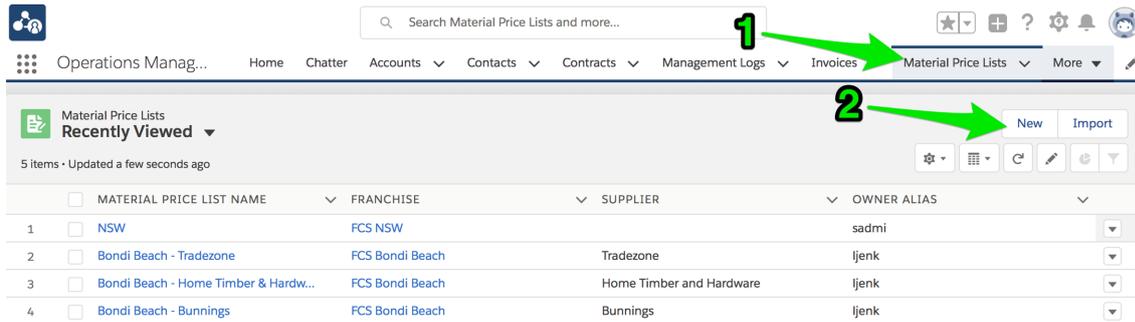
# Creating a material price list

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

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

## To create a price list

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



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

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

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

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

New Material Price List

---

**Information**

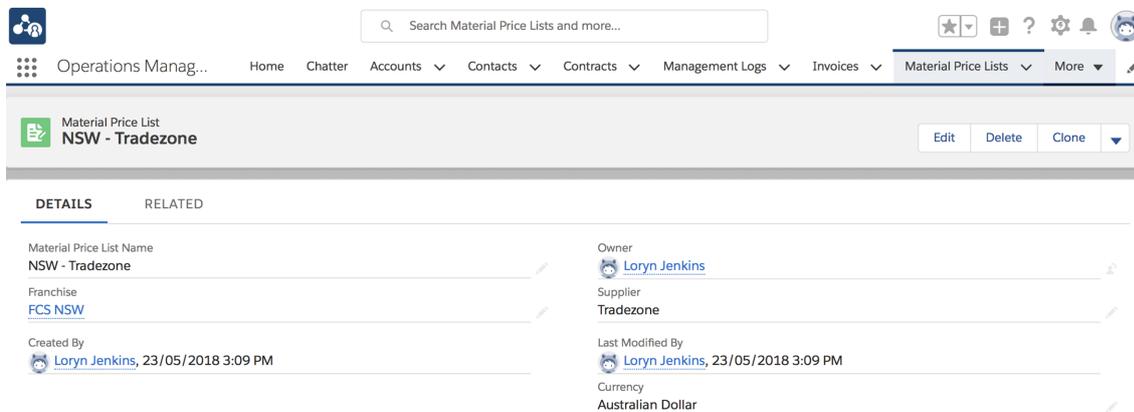
* Material Price List Name <input type="text" value="NSW - Tradezone"/>	Owner <b>Loryn Jenkins</b>
* Franchise <input type="text" value="FCS NSW"/>	Supplier <input type="text" value="Tradezone"/>

**System Information**

Currency



The new price list displays.



The screenshot shows the 'Material Price Lists' section of the Operations Management application. The main header includes a search bar and navigation tabs for 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Material Price Lists', and 'More'. The selected 'Material Price Lists' tab displays a card for the newly created list: 'Material Price List NSW - Tradezone'. Below the card, there are two tabs: 'DETAILS' and 'RELATED'. The 'DETAILS' tab is active, showing a list of fields and their values:

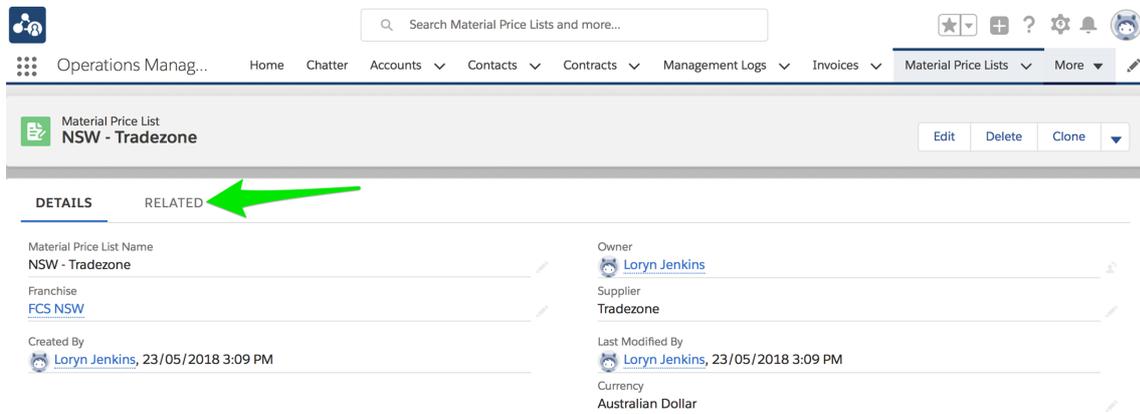
Material Price List Name <b>NSW - Tradezone</b>	Owner <a href="#">Loryn Jenkins</a>
Franchise <a href="#">FCS NSW</a>	Supplier <b>Tradezone</b>
Created By <a href="#">Loryn Jenkins</a> , 23/05/2018 3:09 PM	Last Modified By <a href="#">Loryn Jenkins</a> , 23/05/2018 3:09 PM
	Currency <b>Australian Dollar</b>

# Adding a material

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

## To add a material to a price list

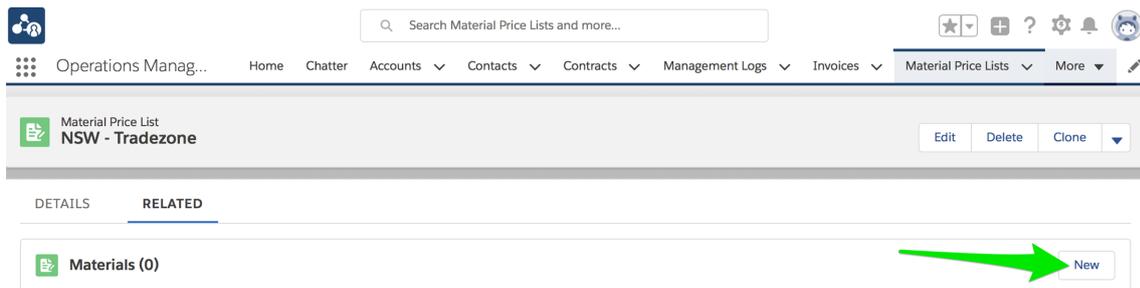
1. From the **Material Price List**, select the **Related** tab.



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

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

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



The screenshot shows the 'Materials' section of the 'Material Price List' interface for 'NSW - Tradezone'. The 'RELATED' tab is selected. The 'Materials (0)' section is visible, and a green arrow points to the 'New' button.

The **New Material** dialog box displays.

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

#### New Material

#### Information

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

Cancel Save & New Save

The new material record is added to the price list.

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

Material Price List  
NSW - Tradezone Edit Delete Clone

DETAILS RELATED

Materials (1) New

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

View All



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

# CHAPTER 11

## Customer Communications

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# 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.



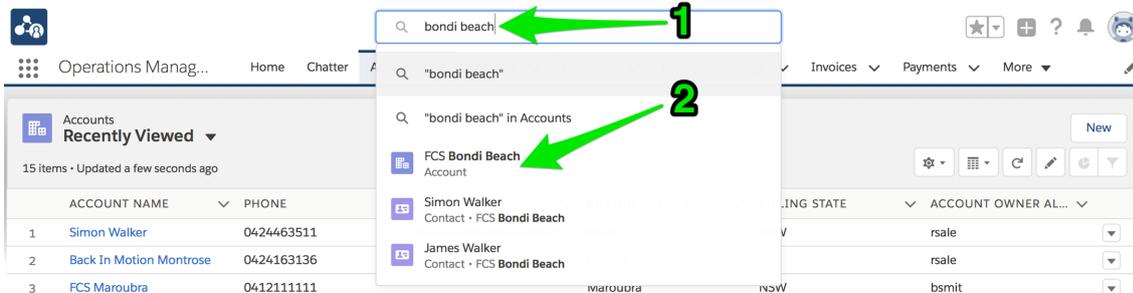
Be aware that the use of these features on Accounts, Contracts and Invoices create records that are visible to franchisees. To create compliance-related records that are not visible to franchisees, See “Working with Management Logs” on page 175.

## 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.

The screenshot displays a CRM interface for an account named 'FCS Bondi Beach'. The account is active and located at 11 Beach Road, Bondi NSW 2026, Australia. The account owner is Simon Walker, with contact details including email (simon.walker@gmail.com) and phone (0411123456). The page also shows a field manager (OPS Field Manager) and a next review date of 23/03/2018 12:00 PM. On the right, there is an activity timeline showing a recent email from OPS Finance Manager to Simon Walker.

DETAILS	RELATED
Account Name <b>FCS Bondi Beach</b>	Account Owner <a href="#">Simon Walker</a>
Parent Account	Email <a href="mailto:simon.walker@gmail.com">simon.walker@gmail.com</a>
Status <b>Active</b>	Phone <b>0411123456</b>
Status Reason	Fax
Inactive Reason	Cell Member Role
Field Manager <a href="#">OPS Field Manager</a>	Primary Cell Group
Timezone <a href="#">Australia/Sydney GMT+1000</a>	Secondary Cell Group
Next Review Due Date	
Next Review Date <b>23/03/2018 12:00 PM</b>	

**ACTIVITY** | **CHATTER**

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

Create new... **Add**

**Activity Timeline** | Expand All

**Next Steps** | More Steps

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

**Past Activity**

> **Invoice - INV-0...** | 7:44 AM | 18/05 | [OPS Finance Manager](#) sent an email to [Simon Walker](#)

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

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

**RELATED**

We found no potential duplicates of this account.  
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

**Related Contacts (2)**

<b>Simon Walker</b> Account N... FCS Bondi Beach Title: Email: athelwald.jenkins@gmail.com	<b>James Walker</b> Account N... FCS Bondi Beach Title: Email:
---	---

[View All](#)

**Contracts (Franchise Profile) (2)**

<b>00000124</b> Account Na... Simon Walker Status: Activated Contract Star... 5/10/2017	<b>00000224</b> Account Na... FCS Bondi Beach Status: Activated Contract Star... 1/05/2018
--	---

[View All](#)

**ACTIVITY**

**Log a Call** New Event New Task More

Create new... [Add](#)

Activity Timeline [Expand All](#)

Next Steps [More Steps](#)

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

Past Activity

- Invoice - INV-0...** 7:44 AM | 18/05  
OPS Finance Manager sent an email to Simon Walker
- Scheduled Review** 12:00 PM | 23/03  
OPS Field Manager had an Event
- Scheduled Review** 12:00 PM | 23/03  
Simon Walker had an Event

- 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.

**Job Offers (6+)**

JOB OFFER N...	JOB N...	STATUS	COMMENTS
<a href="#">JON-00273</a>	JN-00348	Timed Out	
<a href="#">JON-00260</a>	JN-00332	Accepted	
<a href="#">JON-00259</a>	JN-00331	Accepted	
<a href="#">JON-00258</a>	JN-00330	Accepted	
<a href="#">JON-00241</a>	JN-00296	Timed Out	
<a href="#">JON-00198</a>	JN-00250	Timed Out	

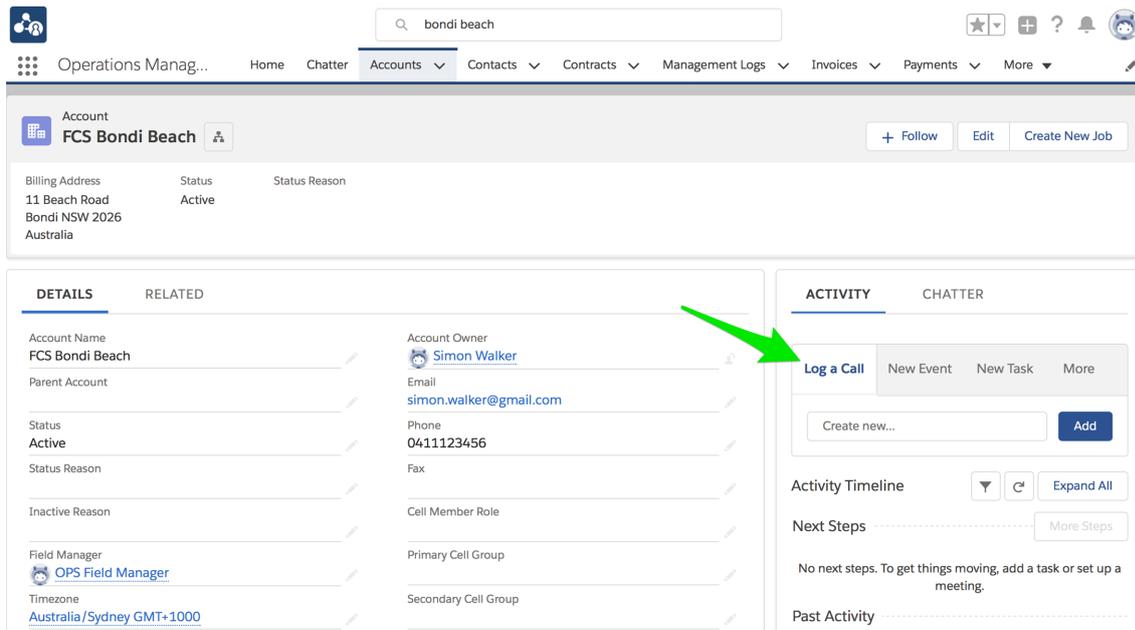
[View All](#)

# 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.

Account: **FCS Bondi Beach** | Status: Active | Billing Address: 11 Beach Road, Bondi NSW 2026, Australia

**DETAILS** | RELATED

Account Name	FCS Bondi Beach	Account Owner	Simon Walker
Parent Account		Email	simon.walker@gmail.com
Status	Active	Phone	0411123456
Status Reason		Fax	
Inactive Reason		Cell Member Role	
Field Manager	OPS Field Manager	Primary Cell Group	
Timezone	Australia/Sydney GMT+1000	Secondary Cell Group	
Next Review Due Date			

**ACTIVITY** | CHATTER

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

Subject: **Call Simon**

Comments: **Question on location details for tomorrow.**

Name: **Simon Walker**

**Save**

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

Account: **FCS Bondi Beach** | Status: Active | Billing Address: 11 Beach Road, Bondi NSW 2026, Australia

**DETAILS** | RELATED

Account Name	FCS Bondi Beach	Account Owner	Simon Walker
Parent Account		Email	simon.walker@gmail.com
Status	Active	Phone	0411123456
Status Reason		Fax	
Inactive Reason		Cell Member Role	
Field Manager	OPS Field Manager	Primary Cell Group	
Timezone	Australia/Sydney GMT+1000	Secondary Cell Group	
Next Review Due Date			

**ACTIVITY** | CHATTER

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

Create new... **Add**

Activity Timeline: **Call Simon** Today

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

Past Activity: You logged a call with **Simon Walker**

## 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 screenshot shows the Salesforce interface for the account 'FCS Bondi Beach'. The 'Activity' pane is open, and the 'Email' tab is selected, indicated by a green arrow. The 'Email' tab is part of a menu that also includes 'Log a Call', 'New Event', and 'New Task'. Below the menu, there is a 'Create new...' input field and an 'Add' button. The 'Activity Timeline' section shows a task titled 'Wants to reschedule...' with a due date of 'Tomorrow' and a note that 'OPS Compliance Manager has an upcoming Task with Simon Walker'.

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

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

The screenshot shows the Salesforce interface for the account 'FCS Bondi Beach'. The 'DETAILS' tab is active, displaying account information such as 'Account Name: FCS Bondi Beach', 'Account Owner: Simon Walker', and 'Email: simon.walker@gmail.com'. A green arrow labeled '1' points to the email field, where a context menu is open with the option 'Copy Email Address' selected. Another green arrow labeled '2' points to the 'To' field in the 'ACTIVITY' tab, which is currently empty. The 'ACTIVITY' tab also shows a 'New Event' button and a 'Send' button at the bottom right.

DETAILS	RELATED
Account Name <b>FCS Bondi Beach</b>	Account Owner <b>Simon Walker</b>
Parent Account	Email <b>simon.walker@gmail.com</b>
Status <b>Active</b>	Phone <b>0411123456</b>
Status Reason	Fax
Inactive Reason	Cell Member Role
Field Manager <b>OPS Field Manager</b>	Primary Cell Group
Timezone <b>Australia/Sydney GMT+1000</b>	Secondary Cell Group
Next Review Due Date	
Next Review Date <b>23/03/2018 12:00 PM</b>	
<b>Business Information</b>	
Legal Entity Name <b>Walker Family Trust</b>	Business Number <b>554333222</b>
Trading Name <b>Aura Pty Limited as Trustee for Walker Family Trust</b>	Company Number <b>604445554</b>
Operating Structure <b>Trust</b>	

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

The screenshot displays the Salesforce interface for the account 'FCS Bondi Beach'. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', and 'More'. The account details section shows the billing address (11 Beach Road, Bondi NSW 2026, Australia), status (Active), and status reason. The 'DETAILS' tab is active, showing account information such as Account Name, Parent Account, Status, Status Reason, Inactive Reason, Field Manager (OPS Field Manager), Timezone (Australia/Sydney GMT+1000), Next Review Due Date, and Next Review Date (23/03/2018 12:00 PM). Below this, there are sections for Business Information and Address Information.

The 'ACTIVITY' tab is also visible, showing an email composition window. The email is addressed to 'simon.walker@gmail.com' and 'headofficemanager@tfc.com.fcso...'. The subject is 'Additional meeting times'. The body of the email contains the text: 'Hi Simon', 'Just checked my schedule. I'm also available on the 15th and 18th. Is that of interest?', and 'Yours, Luke'. A green arrow points to the 'Send' button at the bottom right of the email composition window.

DETAILS	RELATED
Account Name <b>FCS Bondi Beach</b>	Account Owner <b>Simon Walker</b>
Parent Account	Email <a href="mailto:simon.walker@gmail.com">simon.walker@gmail.com</a>
Status <b>Active</b>	Phone <b>0411123456</b>
Status Reason	Fax
Inactive Reason	Cell Member Role
Field Manager <b>OPS Field Manager</b>	Primary Cell Group
Timezone <a href="#">Australia/Sydney GMT+1000</a>	Secondary Cell Group
Next Review Due Date	
Next Review Date <b>23/03/2018 12:00 PM</b>	
<b>Business Information</b>	
Legal Entity Name <b>Walker Family Trust</b>	Business Number <b>554333222</b>
Trading Name <b>Aura Pty Limited as Trustee for Walker Family Trust</b>	Company Number <b>604445554</b>
Operating Structure <b>Trust</b>	
<b>Address Information</b>	
Billing Address	Shipping Address

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

The screenshot shows the Salesforce interface for the account 'FCS Bondi Beach'. The 'ACTIVITY' tab is selected, showing a list of activities. A red box highlights an activity titled 'Additional meeting ...' with the description 'You sent an email to simon.walker@gmail.com'. The activity is dated '5:21 PM | Today'. Other activities include 'Call Simon' with the description 'You logged a call with Simon Walker'.



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

The screenshot shows the 'Email' activity creation form in Salesforce. The 'From' field is set to 'REC Sales Manager <mike@franchisec...'. The 'To' field is empty. The 'Related To' field has 'Alexander Ivanov' selected. A red box highlights the 'Send' button, which is located at the bottom right of the form.

## 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.

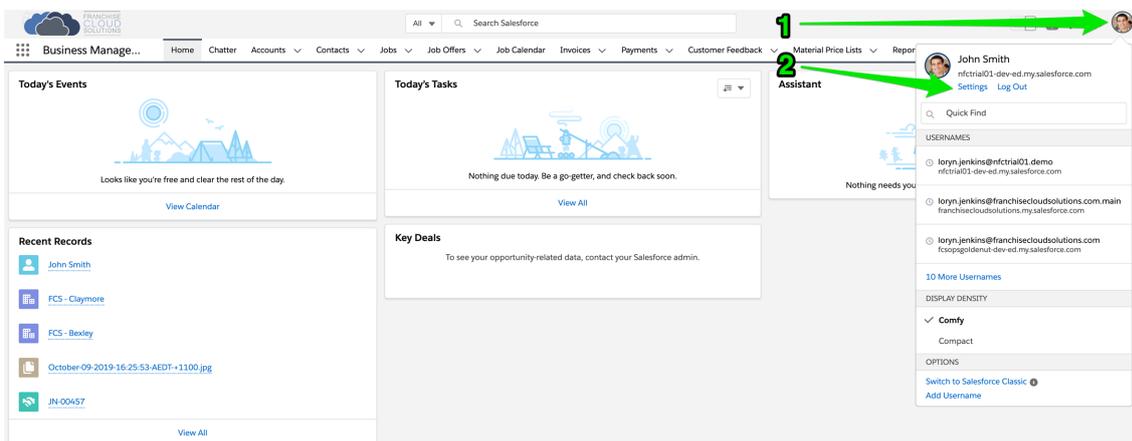
System administrators need to upload the signature block images and distribute the resulting URLs to each user. Then each user sets up their own signature block URLs.



Ask your system administrator for a signature block URL.

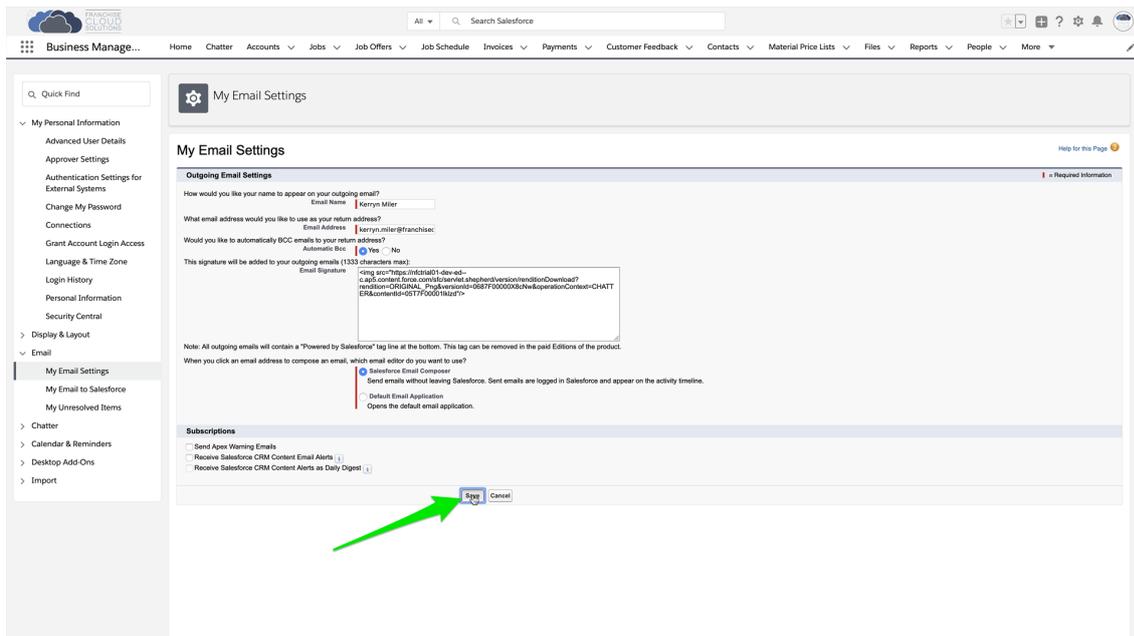
### To set up a signature block

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

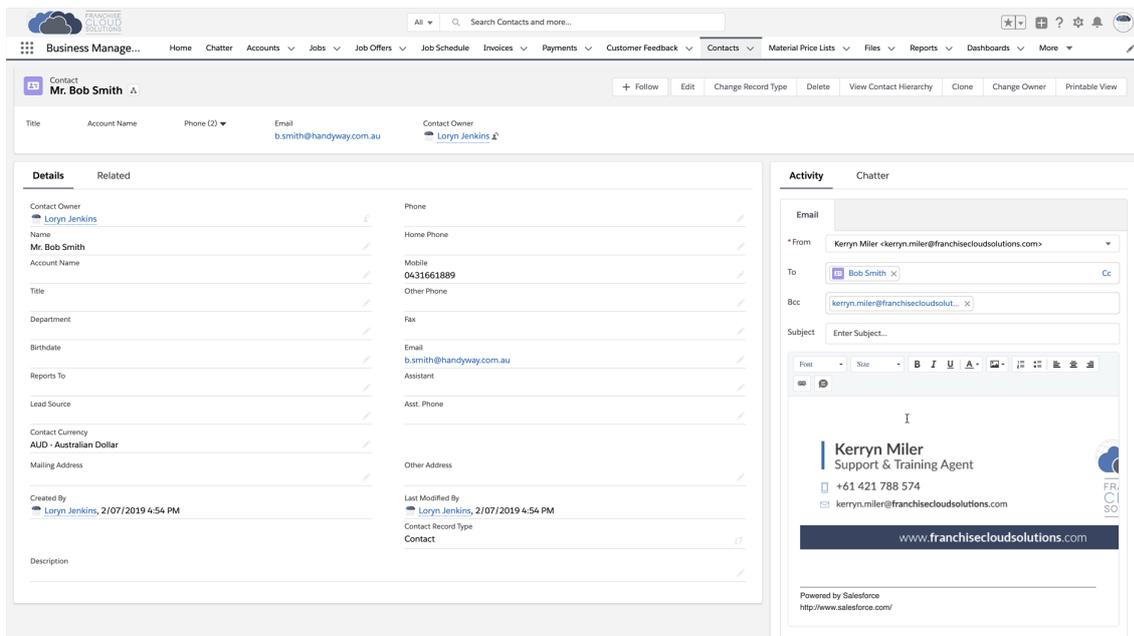




## 5. Press Save.



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

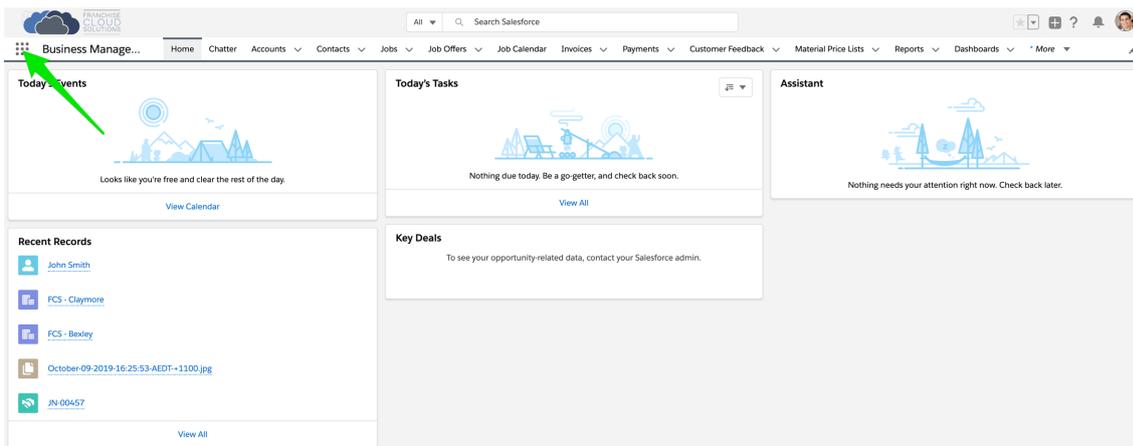


## How to edit email template headers and footers

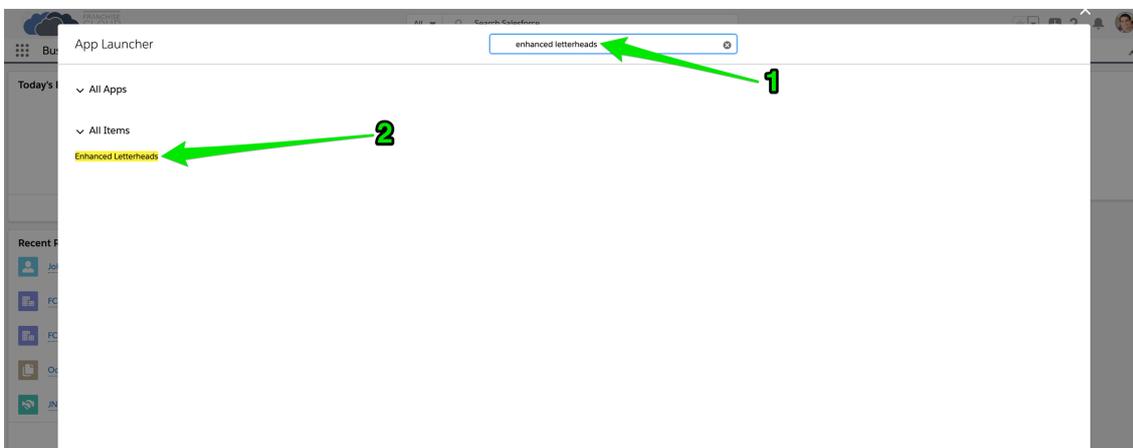
Most likely you will have created branded headers and footers for use with all email templates.

## To review the branded email headers and footers

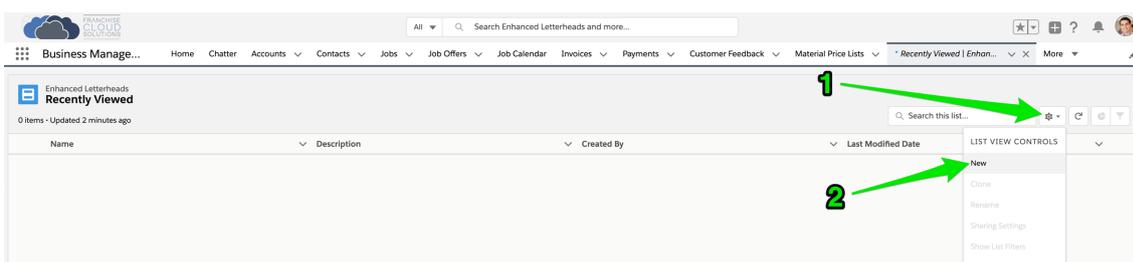
### 1. Open the App Launcher.



### 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**.

New List View

\*List Name **1**

All

Who sees this list view?

Only I can see this list view

All users can see this list view **2**

Share list view with groups of users

Cancel Save

5. Now select the Standard Letterhead.

Name	Created By	Last Modified Date	Description
1 FCS Standard Letterhead	ljenk	23/01/2020 2:18 PM	

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

Enhanced Letterhead: FCS Standard Letterhead

Description

Details

Information

Name: FCS Standard Letterhead

Letterhead Content

Header

Footer: {{{Sender.Signature\_4}}}

System Information

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

Last Modified By: Loryn Jenkins, 25/03/2020 4:46 PM



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

## How to create a custom email template

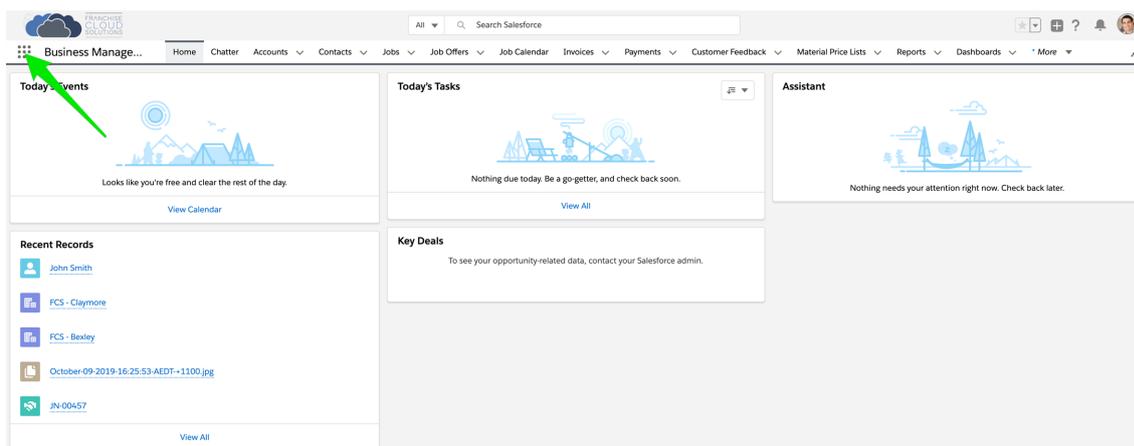
Custom email templates allow you to produce professional email communications for each standard customer touch-point. They often consist of

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

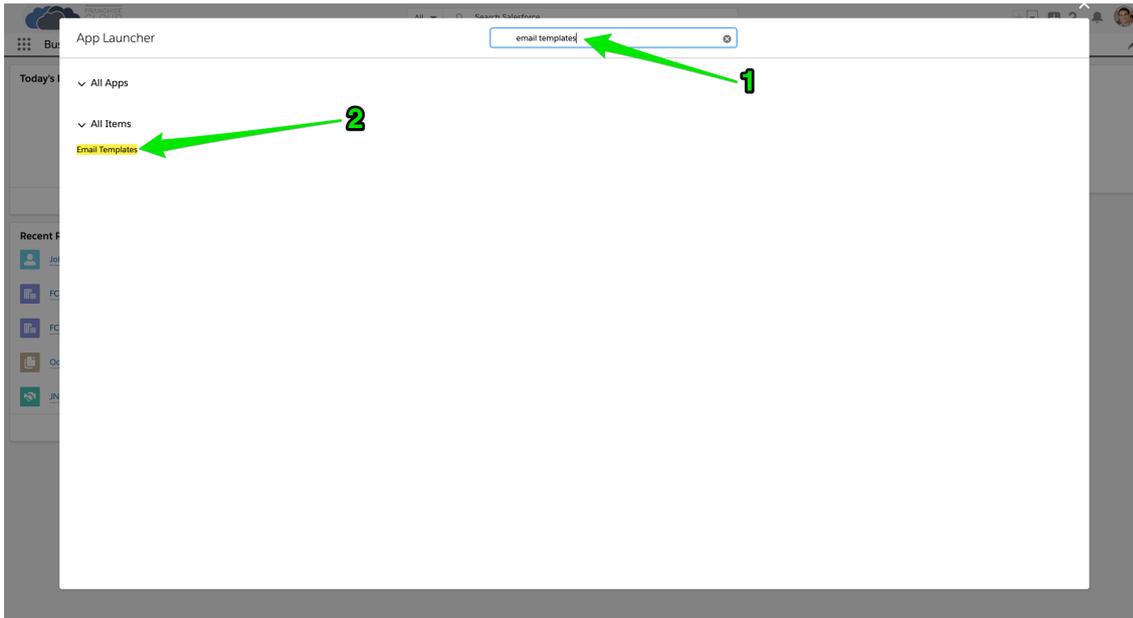
- ✓ Email templates that are frequently created by our clients include
  - » New customer initial contact
  - » Returning customer initial contact
  - » New Quote Job request
  - » New Do & Charge Job request
  - » Scheduled appointment notification
  - » Quote email
  - » Invoice email
  - » Invoice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

## To create a custom email template

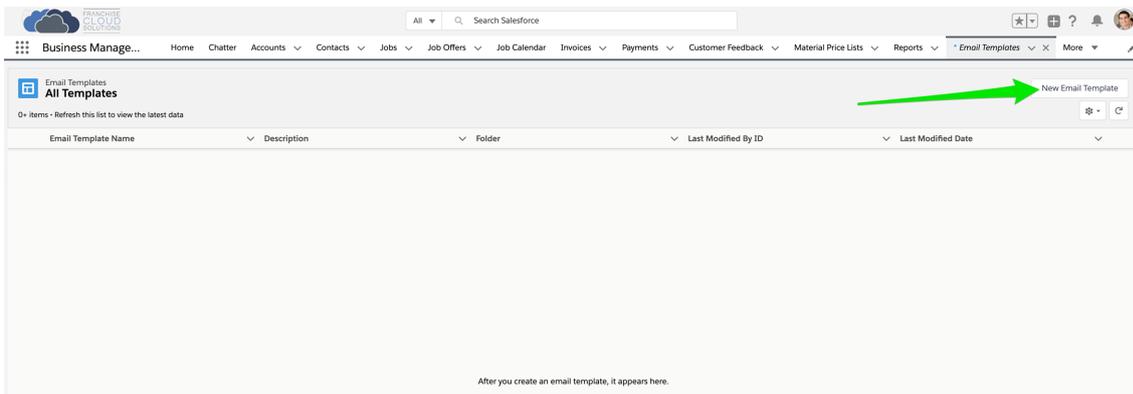
### 1. Open the App Launcher.



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.

New Email Template

**Information**

\* Email Template Name  

Related Entity Type

Description

Folder

**Message Content**

Subject

Enhanced Letterhead

HTML Value

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



**Additional Information**

Created By

Last Modified By

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

New Email Template

**Information**

\*Email Template Name

Description

**Message Content**

Subject

HTML Value

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

**Related Entity Type**

-- None --

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

**Additional Information**

Created By Last Modified By

## 6. Enter an email subject line.

New Email Template

**Information**

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

**Message Content**

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

HTML Value

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

[Rich text editor toolbar and content area]

**Additional Information**

Created By	Last Modified By
<input type="text"/>	<input type="text"/>

## 7. Select an appropriate letterhead.

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value:

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

**Additional Information**

Created By: Last Modified By:



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

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

New Email Template

**Information**

\* Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

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

Dear ,

Please find attached your quote for job .

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

Thank you,|

**Additional Information**

Created By: Last Modified By:

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

New Email Template

---

**Information**

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

---

**Message Content**

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

HTML Value

Dear ,

Please find attached your quote for job .

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

Thank you,



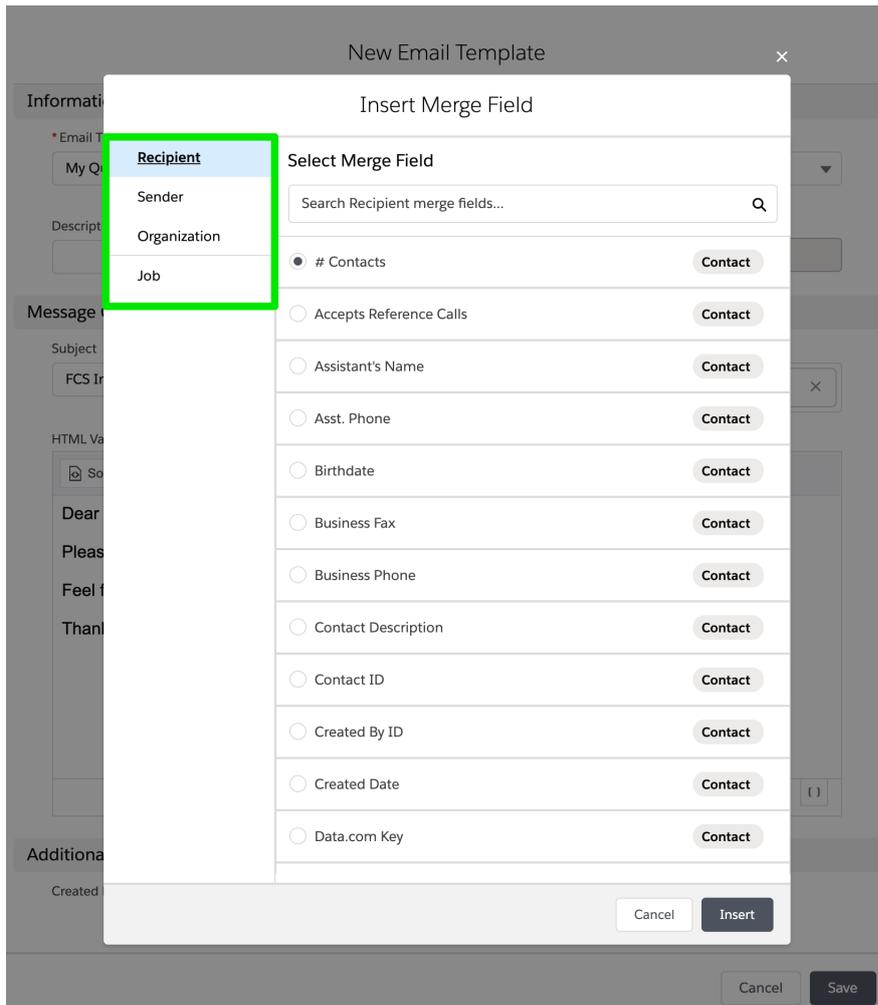
---

**Additional Information**

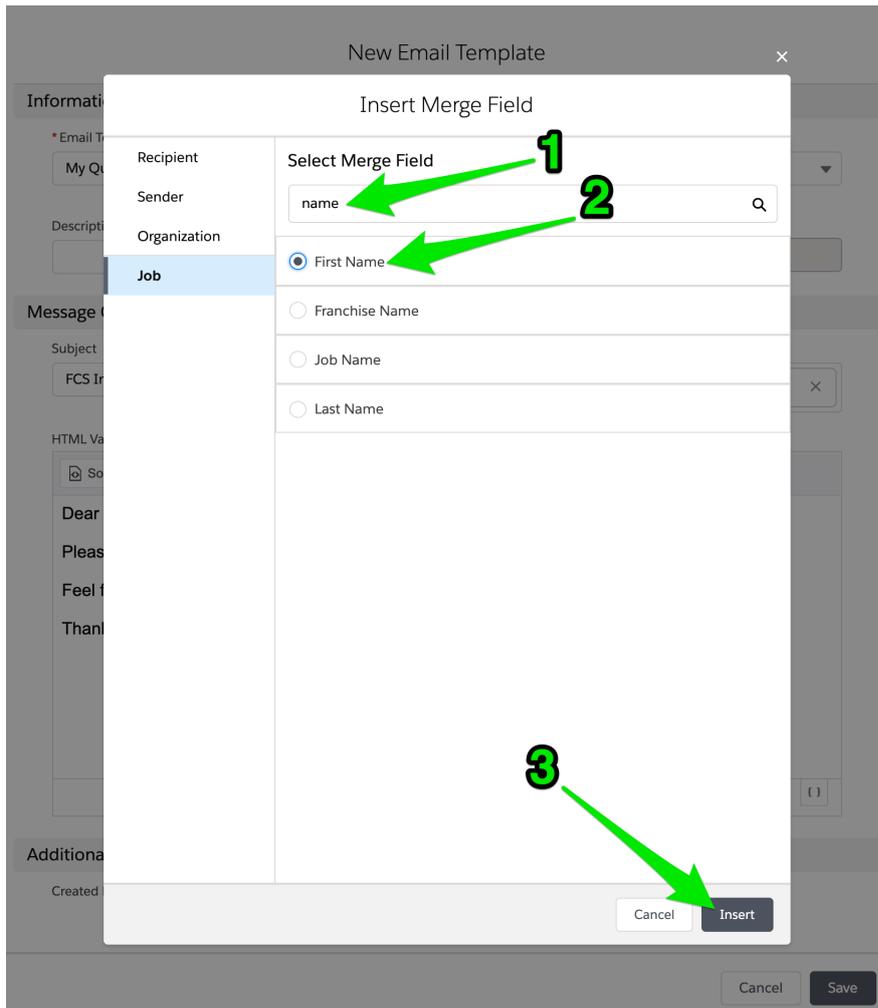
Created By	Last Modified By
------------	------------------

---

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



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



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

New Email Template

**Information**

\*Email Template Name:  Related Entity Type:

Description:  Folder:

**Message Content**

Subject:  Enhanced Letterhead:

HTML Value

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

**Additional Information**

Created By: Last Modified By:



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



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

## How to 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 `EntityType` 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 `EntityType` 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.

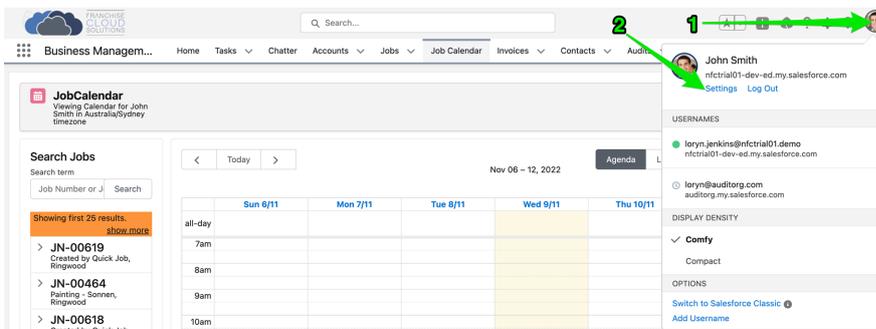
- » “Installing the Salesforce extension for Office 365” on the next page
- » “Installing the Chrome Salesforce extension for GSuite” on page 278
- » “Logging email using Salesforce extensions” on page 282
- » “Logging events using Salesforce extensions” on page 285

## How to send all emails to my inbox

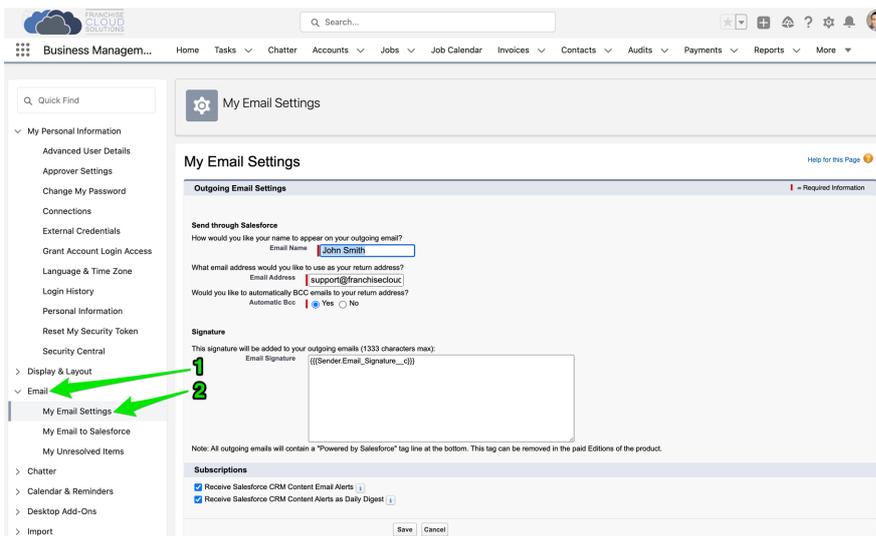
You can configure all emails you send within Salesforce to be automatically blind copied to your own email address.

### 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.

The screenshot shows the 'My Email Settings' page in Salesforce. The 'Outgoing Email Settings' section is expanded, showing the 'Automatic Bcc' option set to 'Yes'. A green arrow points to the 'Yes' radio button. Another green arrow points to the 'Save' button at the bottom of the page.



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

## Granting EAC sync permission

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



Before you agree, you should understand whether your administrator

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



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

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

## Installing the Salesforce extension for Office 365

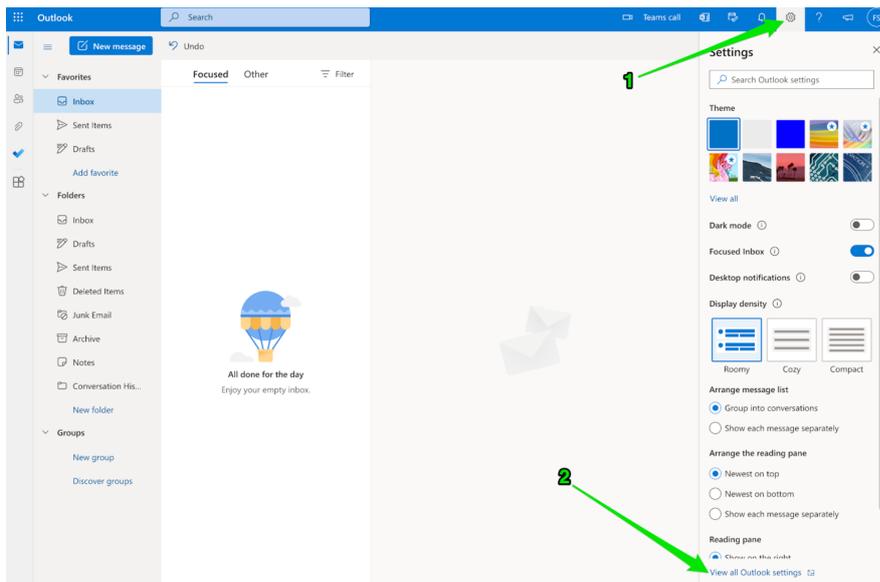
The Salesforce extension for Office 365 provides you control as to

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

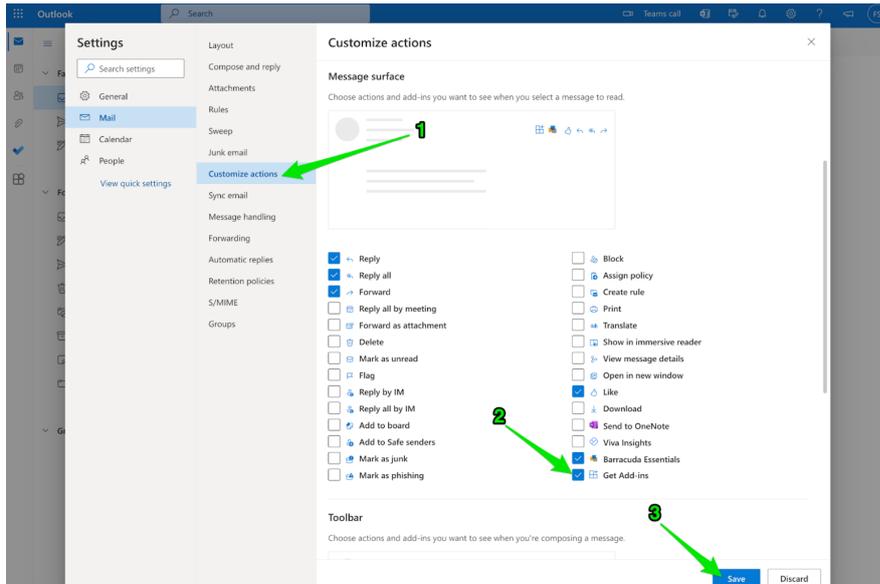
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

### To install the Salesforce extension for Office 365

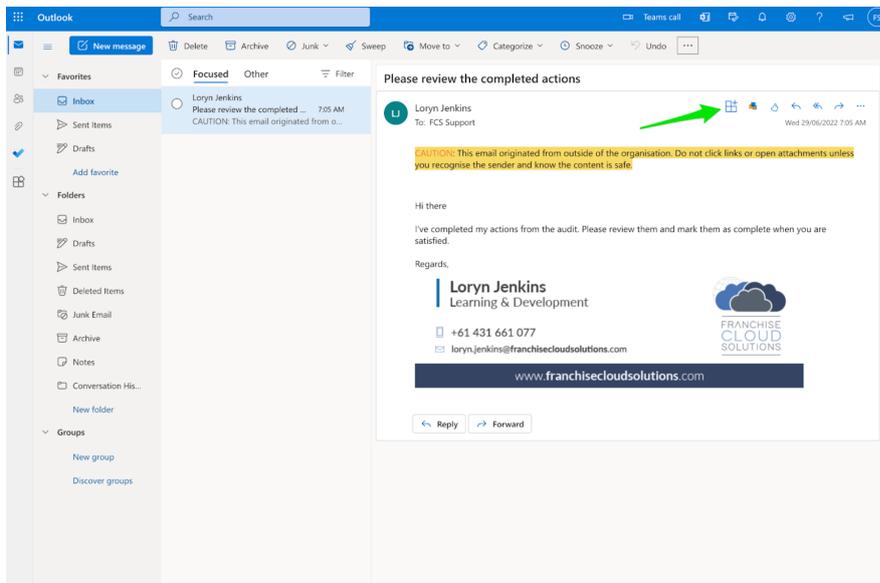
1. From Outlook 365, select the **Settings** menu and choose to **View all Outlook Settings**.



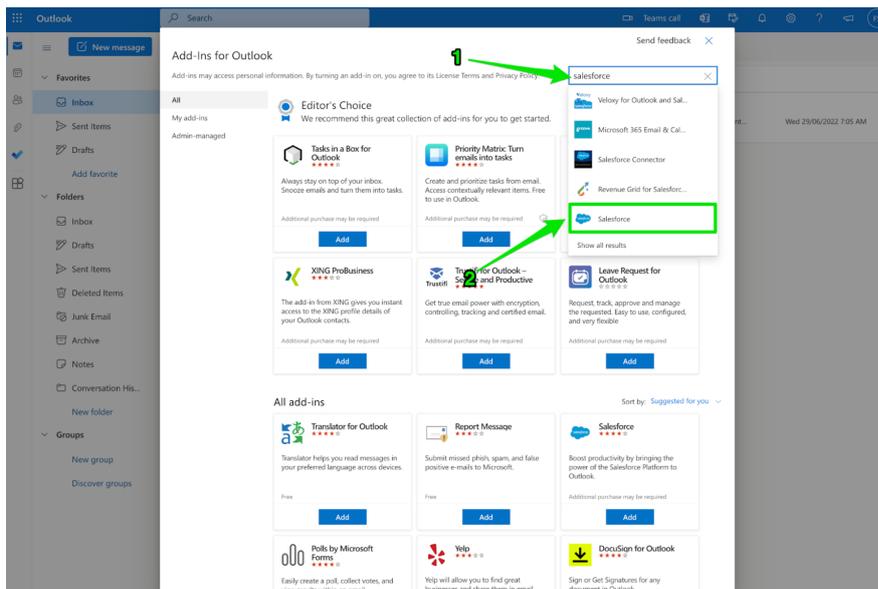
2. Choose **Customize Actions**, scroll to the section named **Message Surface**. Check **Get Add-ins** and press **Save**.



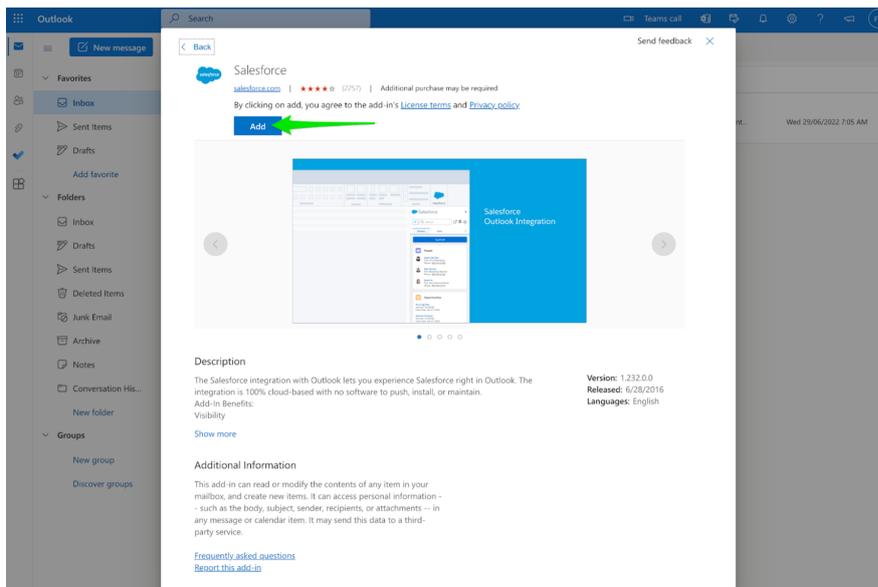
3. Within any message, click the **Get Add-ins** button.



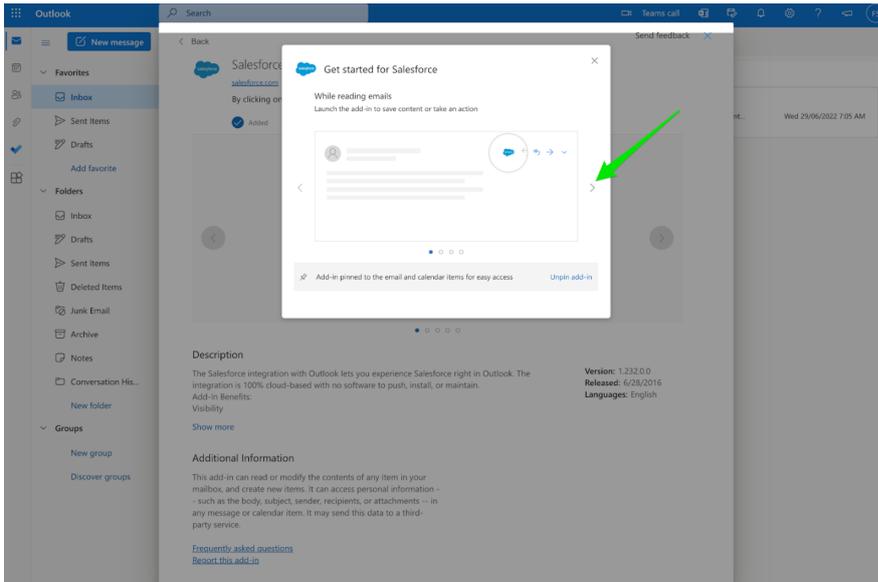
4. Within the Add-ins for Outlook box, search for *Salesforce*. A number of different salesforce add-ins will appear. Select the one shown in the following image or choose Show all results.



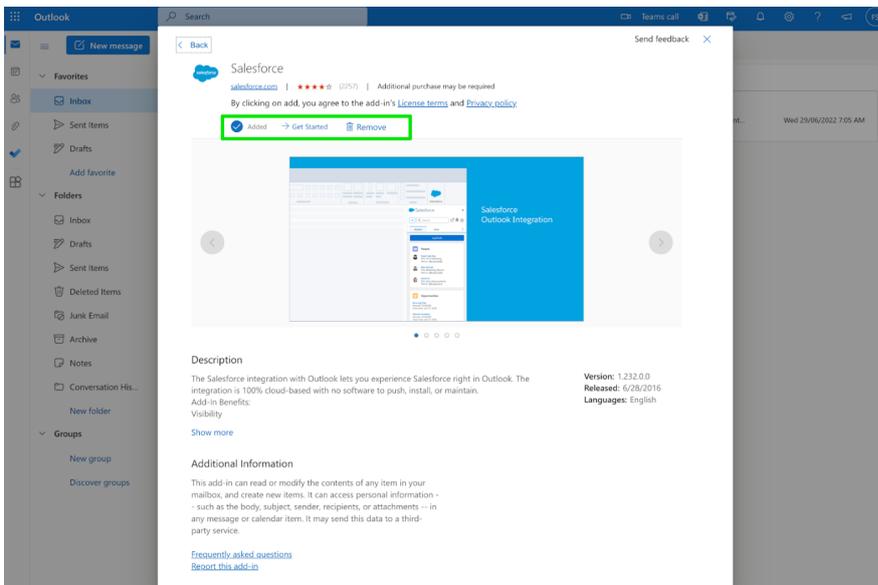
5. From the Salesforce Connector page, press the Add button.



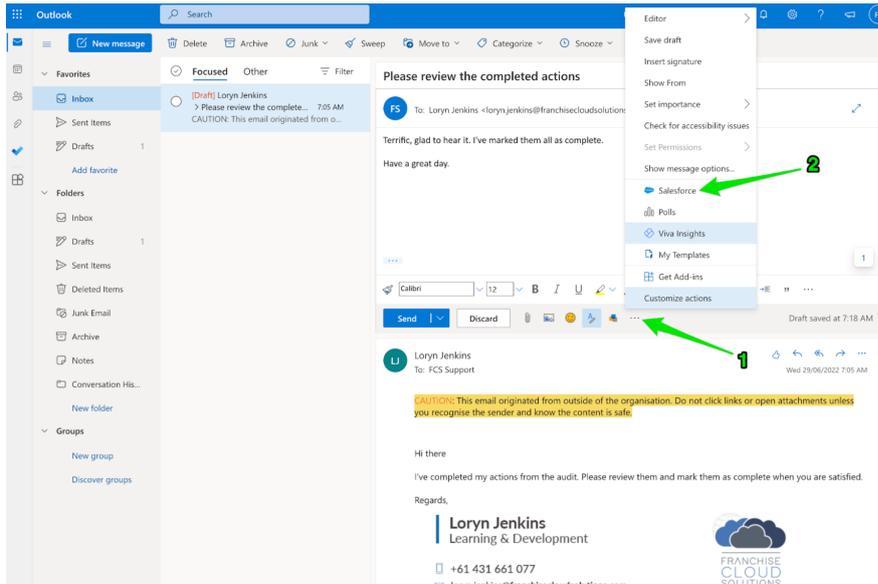
6. We recommend you browse through each of the instructions in the **Get started for Salesforce box**, so you know where to find it and how to use it.



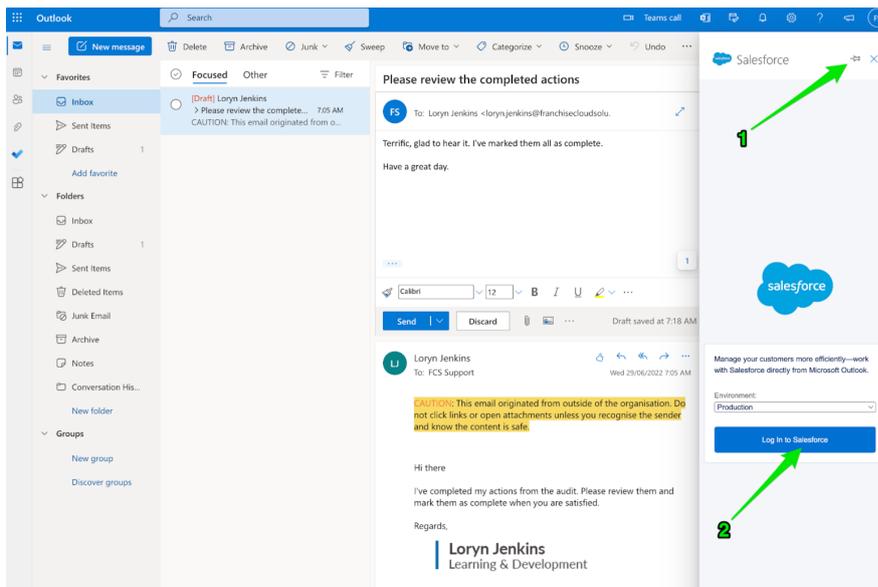
7. Dismiss the **Get started for Salesforce box** and note that the add-in has been added.



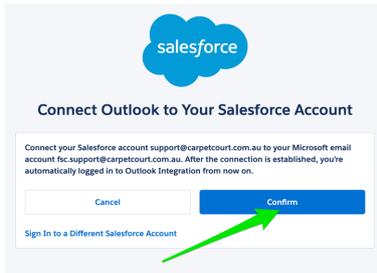
8. Now when you're in any message you're composing, on the **Send** bar, press the ... button to reveal the menu. Select the **Salesforce** add-in.



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

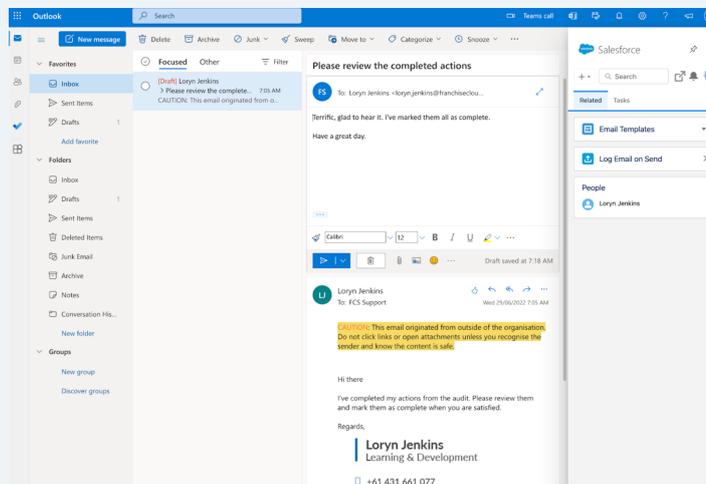


- At the login prompt, enter your Salesforce Username and Password. Once logged in, ensure you **Allow** the connection between **Outlook** and your **Salesforce** account.



## Congratulations

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



## Installing the Chrome Salesforce extension for GSuite

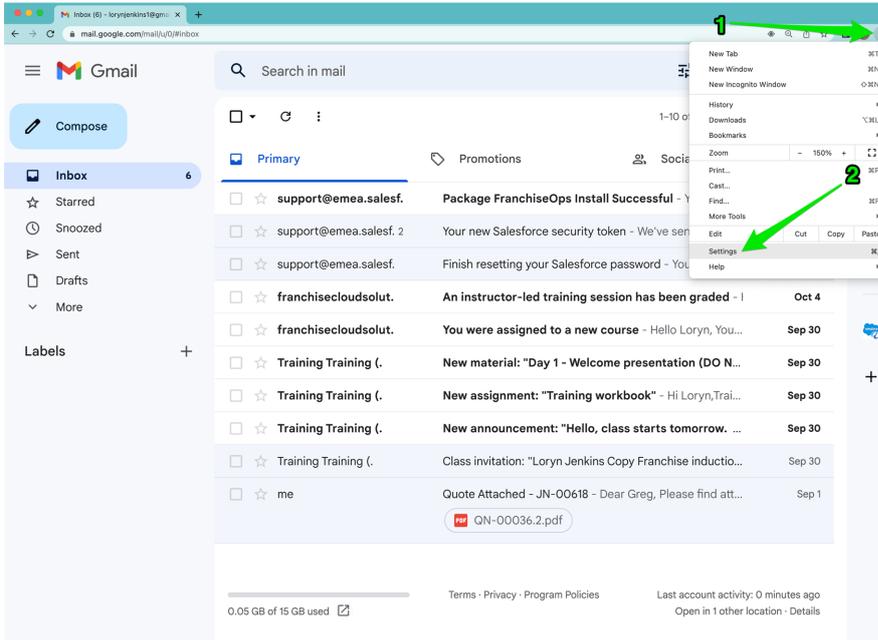
The Salesforce extension for Chrome provides you control as to

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

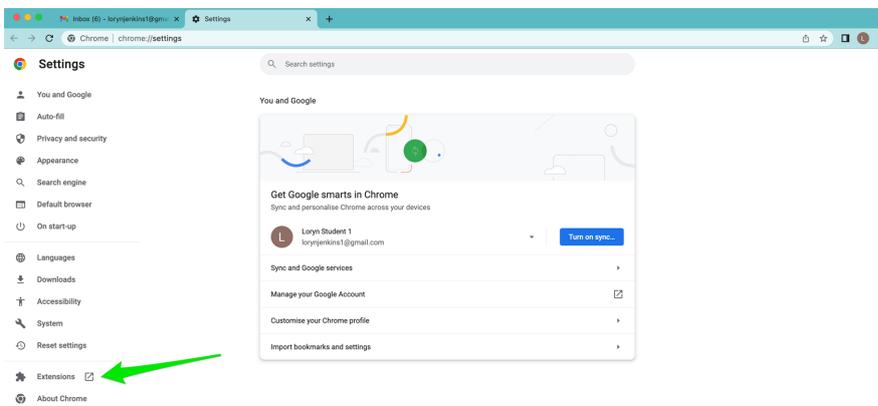
This level of control enables you to ensure the most important emails or events are logged and incidental ones are not. The manual control over where emails or events are logged works well with the architecture Franchise Cloud Solutions have created within the Salesforce environment.

## To install the Salesforce extension for GSuite

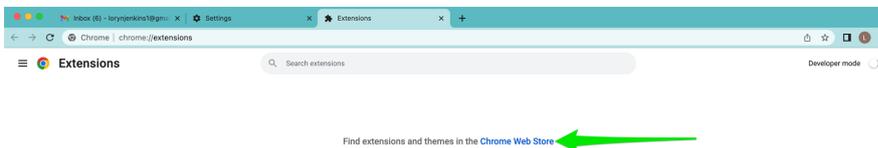
1. Using the **Chrome** browser, open **GMail**. Select the **Customize** menu, and choose **Settings**.



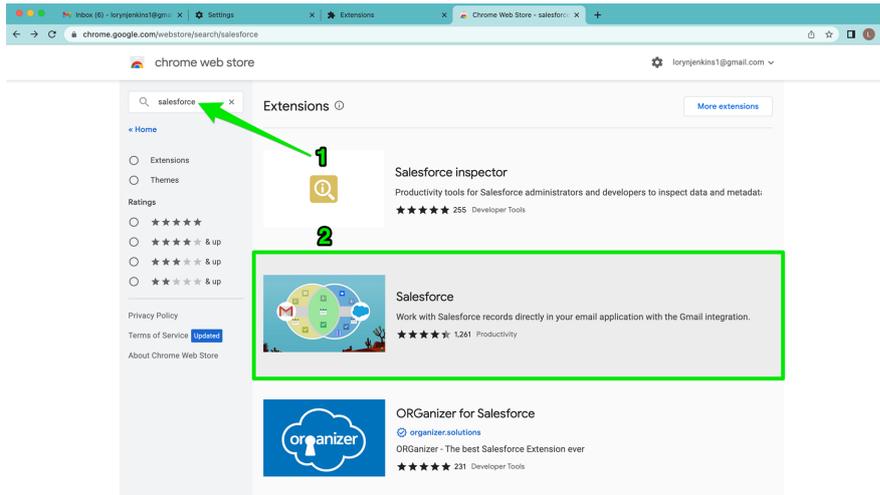
2. Chrome opens a tab in which it displays the **Settings** menu. Select the **Extensions** link.



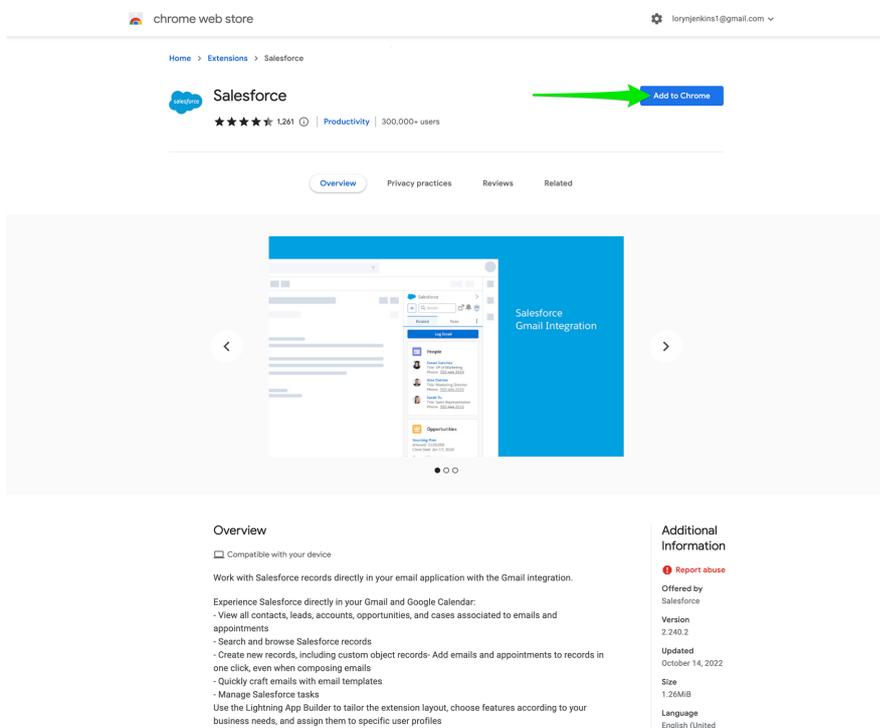
3. **Extensions** opens in yet another tab. Select the link to the **Chrome Web Store**.



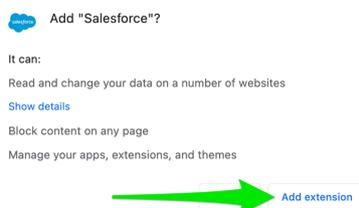
4. A fourth tab opens and displays the **Chrome Web Store**. In the search box, search for *Salesforce*. Select the **Salesforce** extension.



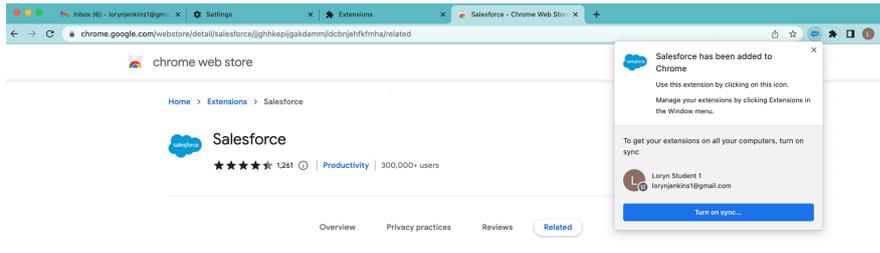
5. From the **Salesforce** entry, select the **Add to Chrome** button.



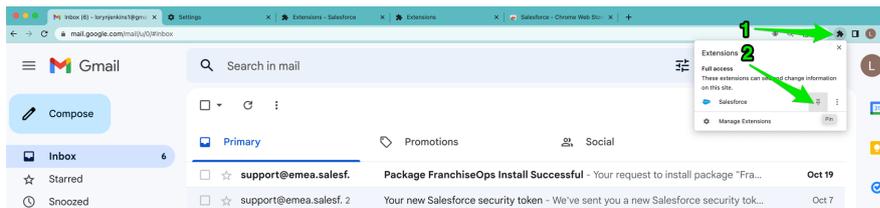
6. From the Add **"Salesforce"** box, select **Add Extension**.



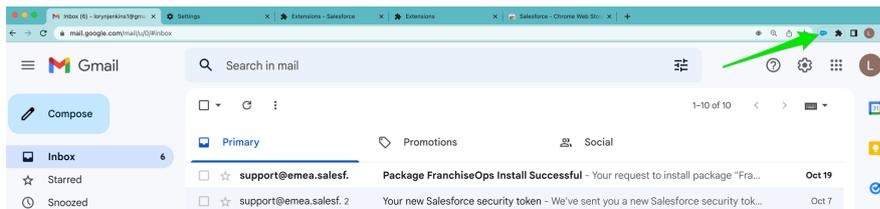
7. Salesforce adds the extension to Chrome then provides a popup to confirm that the extension has been added.



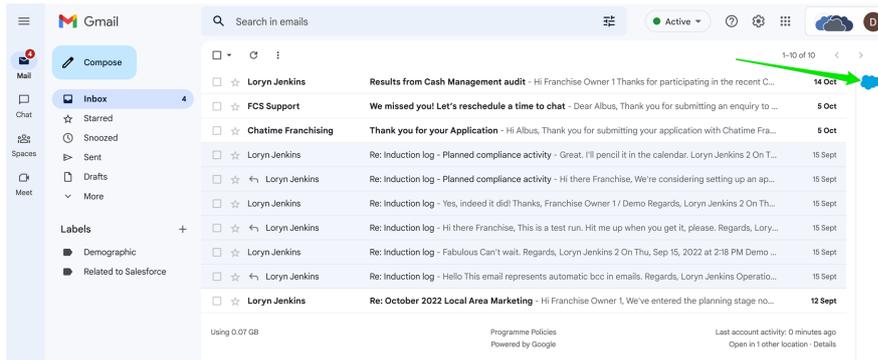
8. Now go back to the tab containing **GMail** and click on the Extensions  button, then click the **Pin** button beside the Salesforce label.



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.

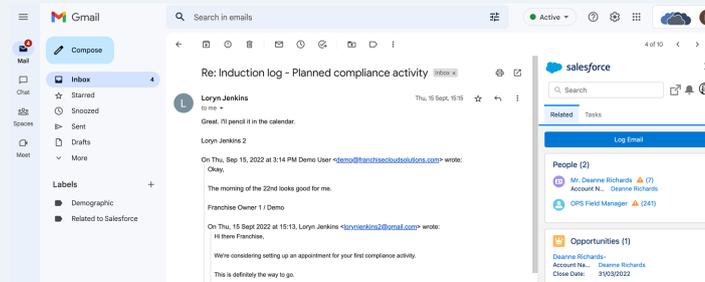


10. The Salesforce extension for Chrome now appears in the sidebar of your web browser. Click on the Salesforce cloud icon to expand the sidebar.



## 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

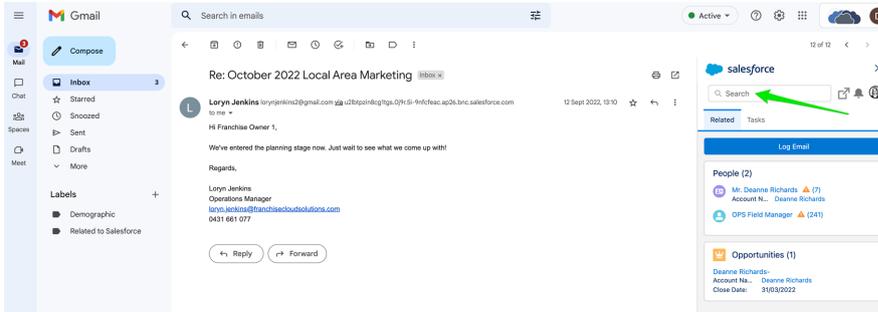
In Operations Management, you should not log email concerning a franchisee into their Franchise Profile Account. If you do this, the franchisee will be able to see the email. You should log confidential email concerning a franchisee into a Management Log record.



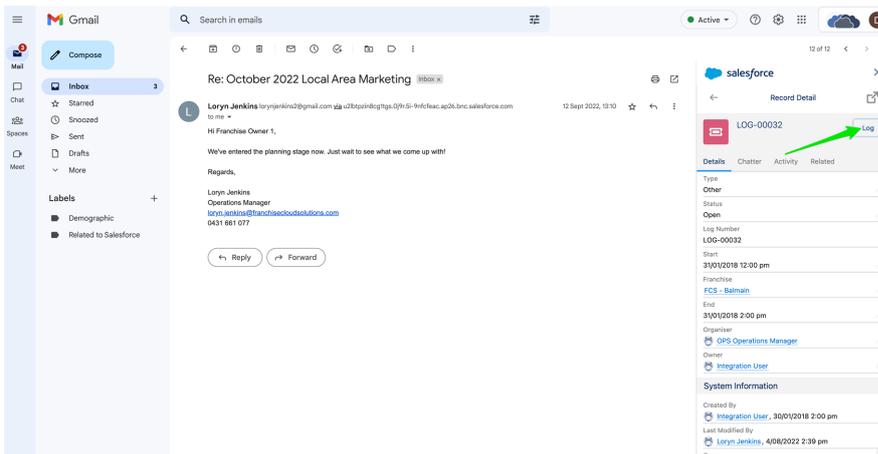
All screen shots below show the Chrome extension. The extension for Office 365 is used similarly.

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

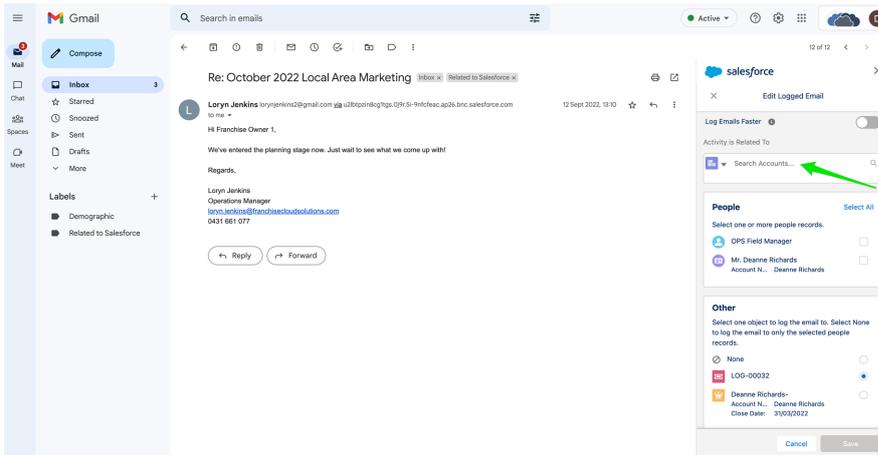
1. With your email open and the Salesforce pane opened, search for the **Management Log** record in the search field.



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

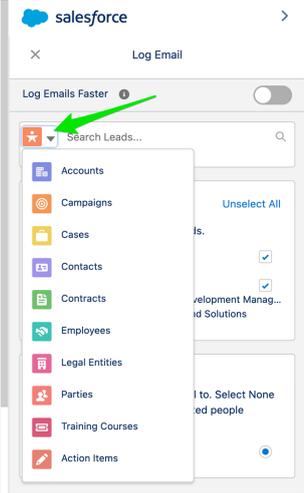


- If you need to add more people to the list, you can search to find other people or other records. Enter your search term in the search box, and choose from the records appearing in the drop-down list.

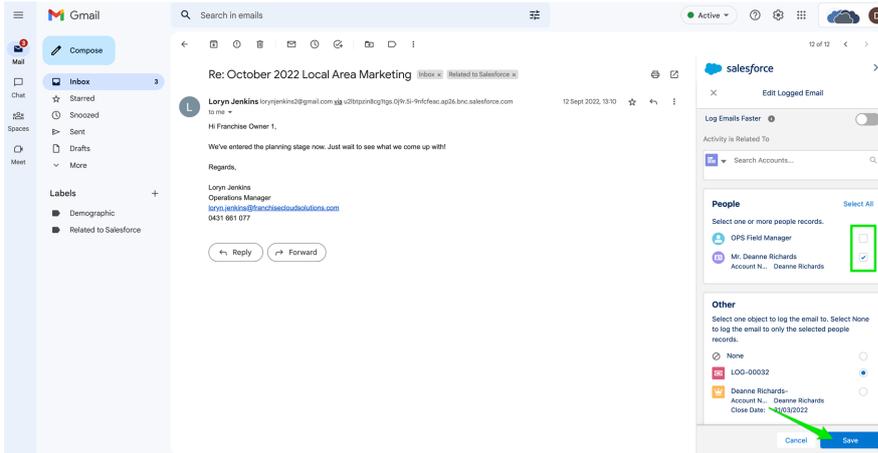


 **Hint**

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

A screenshot of the Salesforce 'Log Email' dialog box. The search dropdown menu is open, showing a list of record types: Accounts, Campaigns, Cases, Contacts, Contracts, Employees, Legal Entities, Parties, Training Courses, and Action Items. A green arrow points to the dropdown menu. The background of the dialog box is dimmed, showing the 'Log Email' title and a 'Log Emails Faster' toggle switch.

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.

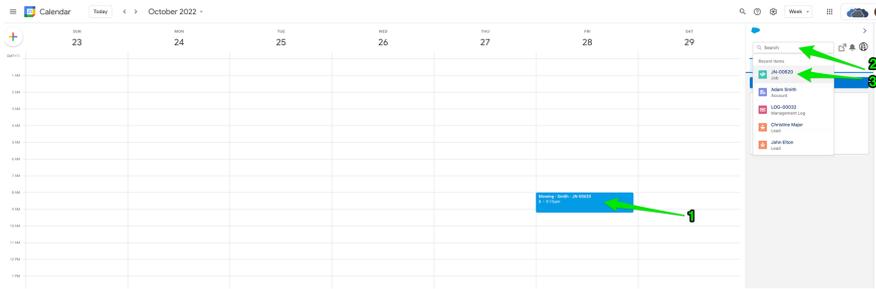


### Do not log confidential events onto the Franchise Profile Account record

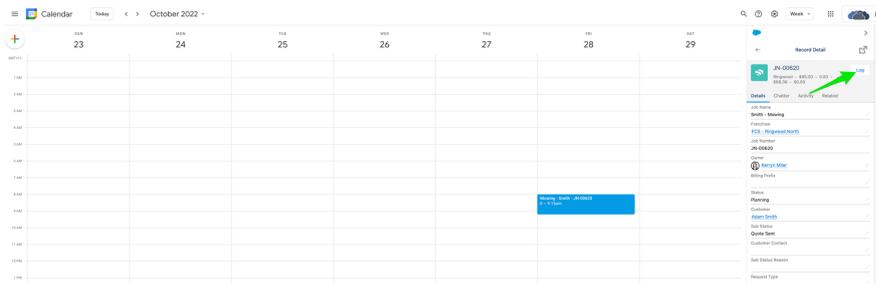
In Operations Management, you should not log email concerning a franchisee into their Franchise Profile Account. If you do this, the franchisee will be able to see the email. You should log confidential email concerning a franchisee into a Management Log record.

## To log an event to a Salesforce record

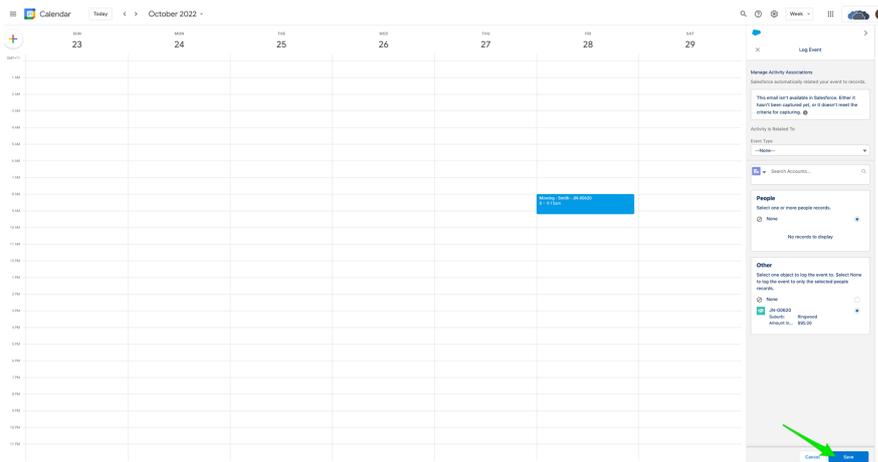
1. In your personal calendar select the event, then search for the appropriate record within the Salesforce search pane.



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

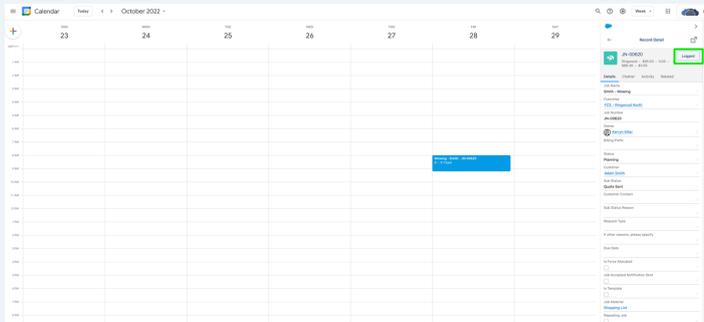


### 3. Now press Save.



## Congratulations

The event is logged to Salesforce.





# CHAPTER 12

## Working with Customer Feedback

Understanding customer feedback .....	290
Job satisfaction .....	291
How to view job satisfaction survey questions .....	291
How to remove someone from job satisfaction surveys .....	292
Customer feedback .....	294
How to view customer complaints and compliments .....	294
How to process new customer complaints and compliments .....	295
How to resolve customer complaints and compliments .....	299

# 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.

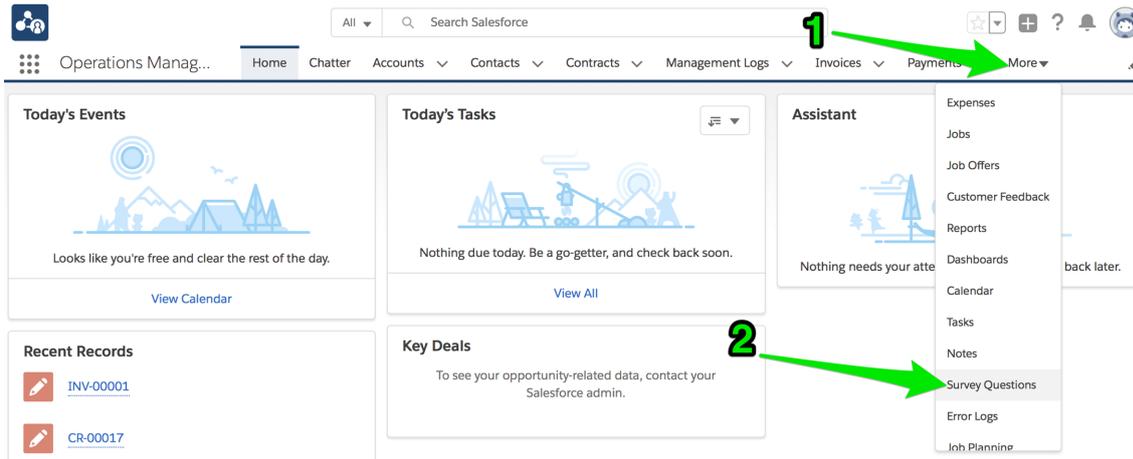
# Job satisfaction

## How to view job satisfaction survey questions

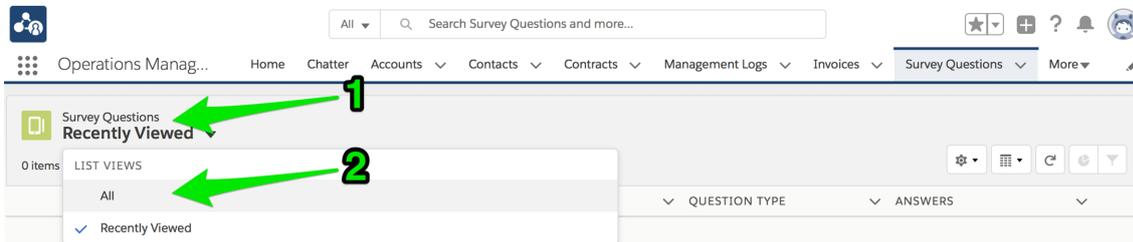
Job satisfaction surveys can be sent to a proportion of customers who have recently had a completed job. You can view the questions asked in this survey by viewing the job satisfaction survey questions.

### To view job satisfaction survey questions

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

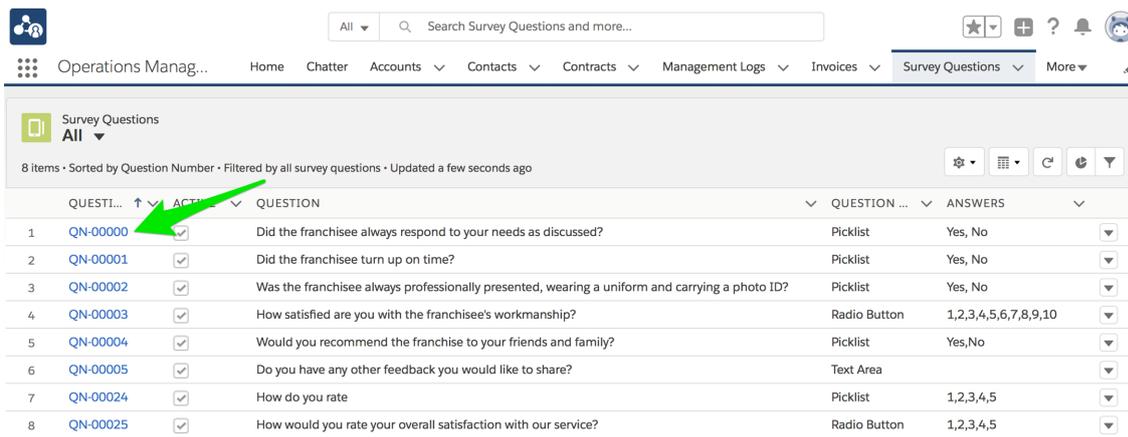


2. Switch to the **All** list view.



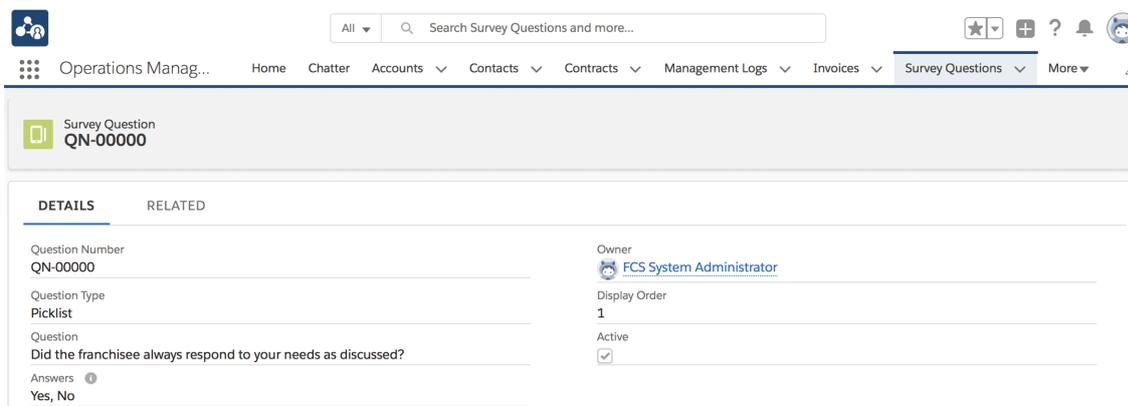
The list of all survey questions appears.

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



QUESTI...	ACTI...	QUESTION	QUESTION ...	ANSWERS
1	<input checked="" type="checkbox"/>	Did the franchisee always respond to your needs as discussed?	Picklist	Yes, No
2	<input checked="" type="checkbox"/>	Did the franchisee turn up on time?	Picklist	Yes, No
3	<input checked="" type="checkbox"/>	Was the franchisee always professionally presented, wearing a uniform and carrying a photo ID?	Picklist	Yes, No
4	<input checked="" type="checkbox"/>	How satisfied are you with the franchisee's workmanship?	Radio Button	1,2,3,4,5,6,7,8,9,10
5	<input checked="" type="checkbox"/>	Would you recommend the franchise to your friends and family?	Picklist	Yes,No
6	<input checked="" type="checkbox"/>	Do you have any other feedback you would like to share?	Text Area	
7	<input checked="" type="checkbox"/>	How do you rate	Picklist	1,2,3,4,5
8	<input checked="" type="checkbox"/>	How would you rate your overall satisfaction with our service?	Radio Button	1,2,3,4,5

The detail for the survey question is displayed.



DETAILS	RELATED
Question Number <b>QN-00000</b>	Owner <a href="#">FCS System Administrator</a>
Question Type <b>Picklist</b>	Display Order <b>1</b>
Question <b>Did the franchisee always respond to your needs as discussed?</b>	Active <input checked="" type="checkbox"/>
Answers <b>Yes, No</b>	



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.

The screenshot shows the account page for Genevieve McMullan. The 'Marketing Information' section is expanded, displaying various fields for communication preferences. The 'Survey Opt Out' checkbox is currently unchecked.

Field	Value
Preferred Communication Channel	
Unsubscribe	<input type="checkbox"/>
Survey Opt Out	<input type="checkbox"/>
SMS Unsubscribe	<input type="checkbox"/>
Last Job Date	
Days Since Last Job Offer	
Last Survey Sent	
Days Since Last Survey	0

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

The screenshot shows the account page for Genevieve McMullan. The 'Marketing Information' section is expanded. A green arrow points to the 'Edit' button in the top right corner of the account card.

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

The screenshot shows the account page for Genevieve McMullan. The 'Marketing Information' section is expanded. The 'Survey Opt Out' checkbox is now checked. A green arrow labeled '1' points to the checked checkbox, and another green arrow labeled '2' points to the 'Save' button. The 'Save' button is highlighted in blue.

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

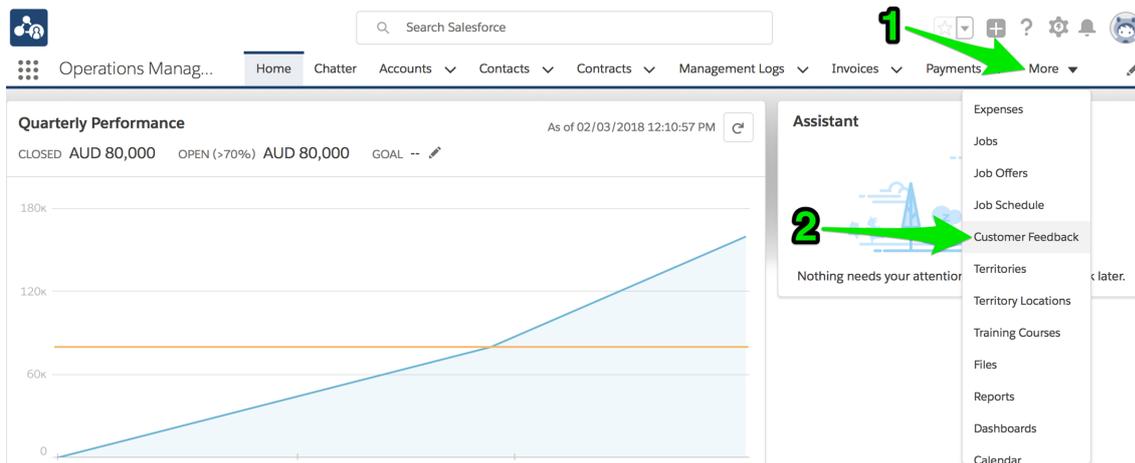
# Customer feedback

## How to view customer complaints and compliments

You can view customer feedback responses.

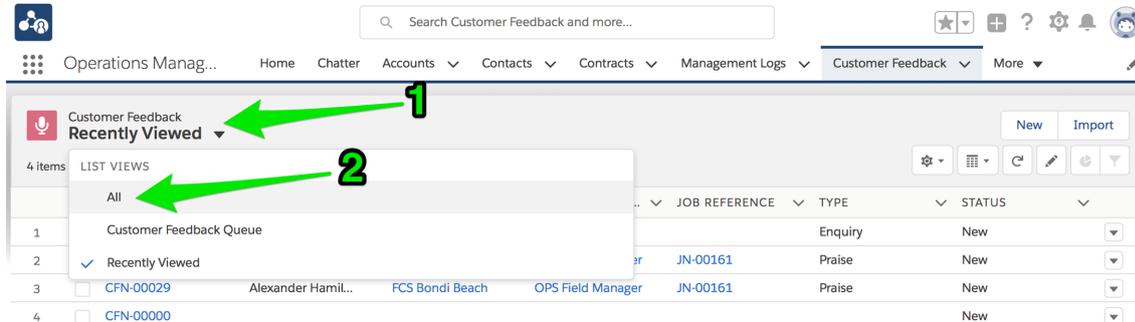
### To view customer feedback responses

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.

Customer Feedback  
All

10 items • Sorted by Customer Feedback Number • Updated 2 minutes ago

	CUSTOMER FE...	FULL NAME	FRANCHISE	FEEDBACK MAN...	JOB REFERENCE	TYPE	STATUS
1	CFN-00030	Alistair Campbell			JN-00159	Complaint	New
2	CFN-00029	Alexander Hamil...	FCS Bondi Beach	OPS Field Manager	JN-00161	Praise	New
3	CFN-00028	Alexander Hamil...	FCS Bondi Beach	OPS Field Manager	JN-00161	Praise	New
4	CFN-00027	Tom Jones			JN-00019		New
5	CFN-00026	Tom Jones			JN-00019	Accident	New
6	CFN-00025	Tom Jones	FCS Matraville	OPS Field Manager	JN-00019	Injury	New

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

DETAILS

Customer Feedback Number  
CFN-00030

Full Name  
Alistair Campbell

Street  
50 Campbell Parade

Suburb  
Bondi Beach

PostCode  
2026

Country  
Australia

State  
NSW

Contact Phone  
0404678922

Email  
acampbell79@gmail.com.ux

Date  
25/05/2018

Summary  
Workman turned up with dirty shoes, tracked dirt into my carpet, failed to clean up after himself.

Owner  
Franchise Cloud Solutions Site Guest User

Status  
New

Franchise

Feedback Manager

Job Reference  
JN-00159

Type  
Complaint

Sub Type

Job Reference Number  
JN-00159

ACTIVITY CHATTER

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

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

Past Activity

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

Load More Past Activities

## 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.

The screenshot shows the 'DETAILS' tab of a Customer Feedback record. The record is in 'Edit' mode, indicated by blue pencil icons next to several fields. A green arrow points to the 'Status' dropdown menu, which is currently set to 'New'. The record details include:

- Customer Feedback Number: CFN-00030
- Full Name: Alistair Campbell
- Street: 50 Campbell Parade
- Suburb: Bondi Beach
- PostCode: 2026
- Country: Australia
- State: NSW
- Contact Phone: 0404678922
- Email: acampbell79@gmail.com.au
- Date: 25/05/2018
- Summary: Workman turned up with dirty shoes, tracked dirt into my carpet, failed to clean up after himself.

The 'ACTIVITY' tab is also visible, showing options to 'Log a Call', 'New Event', 'New Task', and 'More'. The 'Activity Timeline' and 'Next Steps' sections are currently empty.

2. Identify the Franchise to whom this feedback belongs.

The screenshot shows the 'DETAILS' tab of the same Customer Feedback record. The 'Franchise' dropdown menu is open, and a search for 'bondi beach' has been performed. A green arrow labeled '1' points to the search input field, and another green arrow labeled '2' points to the search results. The search results show:

- Q "bondi beach" in Accounts
- FCS Bondi Beach 0411123456
- + New Account

The 'ACTIVITY' tab is also visible, showing options to 'Log a Call', 'New Event', 'New Task', and 'More'. The 'Activity Timeline' and 'Next Steps' sections are currently empty.

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.

**DETAILS**

Customer Feedback Number  
CFN-00030

Full Name  
Alistair Campbell

Street  
50 Campbell Parade

Suburb  
Bondi Beach

PostCode  
2026

Country  
Australia

State  
NSW

Contact Phone  
0404678922

Email  
acampbell79@gmail.com.ux

Date  
25/05/2018

Summary  
Workman turned up with dirty shoes, tracked dirt into my carpet, failed to clean up after himself.

Owner  
Franchise Cloud Solutions Site Guest User

Status  
New

Franchise  
FCS Bondi Beach

Feedback Manager  
Search People...

Job Reference  
JN-00159

Type  
Complaint

Sub Type  
--None--  
--None--  
Workmanship  
Behaviour  
No Call Back  
Driving  
No Show

**ACTIVITY** **CHATTER**

Log a Call New Event New Task More

Create new... Add

Activity Timeline Expand All

Next Steps More Steps

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

Past Activity

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

Load More Past Activities

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

The screenshot shows the 'DETAILS' tab of a Customer Feedback record. The record number is CFN-00030 and the full name is Alistair Campbell. The 'Feedback Manager' dropdown is open, showing a search for 'ops' and a list of roles including OPS Compliance Manager, OPS Head Office Manager, OPS Field Manager, OPS Operations Manager, and OPS Administrator. Green arrows labeled '1' and '2' indicate the search and selection process.

5. Now update the Status to *Assigned*.

The screenshot shows the 'DETAILS' tab of the same Customer Feedback record. The 'Status' dropdown menu is open, showing options: --None--, New, Assigned, In Progress, Resolved, Closed, and On Hold. Green arrows labeled '1', '2', and '3' indicate the selection of 'Assigned' and the clicking of the 'Save' button.

# 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.

The screenshot displays a software interface with two tabs: 'ACTIVITY' and 'CHATTER'. Under the 'ACTIVITY' tab, there are four buttons: 'Log a Call', 'New Event', 'New Task', and 'Email'. Below these buttons is a text input field labeled 'Create new...' and an 'Add' button. Further down, there are sections for 'Activity Timeline' with a dropdown arrow and an 'Expand All' button, 'Next Steps' with a 'More Steps' button, and 'Past Activity' with a 'Load More Past Activities' button. Each section contains a message: 'No next steps. To get things moving, add a task or set up a meeting.' for Next Steps, and 'No past activity. Past meetings and tasks marked as done show up here.' for Past Activity.



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

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# 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

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# 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.

The screenshot displays a CRM interface for an account named "FCS Maroubra". The top navigation bar includes "Operations Manag...", "Home", "Chatter", "Accounts", "Contacts", "Contracts", "Management Logs", "Invoices", "Payments", "Expenses", "Jobs", "Job Offers", and "More". The account details section shows the billing address: "Level 1, Suite 4/166 Rd, Maroubra NSW 2035, Australia". The status is "Active".

The interface is divided into two main panels. The left panel, titled "DETAILS", is split into "RELATED" and "Business Information" sections. The "RELATED" section lists fields such as Account Name (FCS Maroubra), Parent Account (FCS NSW), Status (Active), Account Owner (Bill Smith), Field Manager (OPS Field Manager), and various review dates. The "Business Information" section lists Legal Entity Name (Smith Services Pty Ltd), Trading Name (Company), Business Number (123456666), and Company Number (66123456666).

The right panel, titled "ACTIVITY", is split into "ACTIVITY" and "CHATTER" sections. The "ACTIVITY" section includes a "Log a Call" button, a "Create new..." input field, and filters for "All time" and "All activities". Below this, there are sections for "Next Steps" (with a "More Steps" button) and "Past Activities" (with a "Load More Past Activities" button). A specific activity is shown: "Job Offer JON-00025" at "7:00 AM | 07/10/2017", with a sub-entry "Integration User sent an email to Bill Smith".

At the bottom of the right panel, there is a green-bordered box containing the "Activity Lists" component. It features a menu icon, the text "Activity Lists", and an "Add List" button. Below this is a table with three columns: "NAME", "NUMBER OF TASKS", and "COMPLETED TASKS".

## To apply an activity list:

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

The screenshot shows the account page for 'FCS Maroubra'. The left sidebar contains account details such as Billing Address, Status (Active), and Business Information. The right sidebar shows the 'ACTIVITY' section with options like 'Log a Call', 'New Event', 'New Task', and 'Email'. At the bottom of the right sidebar, there is an 'Activity Lists' section with a table header (NAME, NUMBER OF TASKS, COMPLETED TASKS) and an 'Add List' button highlighted by a green arrow.

The New Activity List dialog box appears.

2. Select an available **Template**.

The 'New Activity List' dialog box is shown. It has a title bar 'New Activity List'. There are two input fields: '\* Activity List Name' with the placeholder 'Enter your Activity List name...' and '\* Related Record Id' with the value '0017F00000EYWVBQA3'. A dropdown menu for '\* Template' is open, showing options: '--None--', 'Business Growth Template' (highlighted with a blue bar and a green arrow), and 'Growth Visit Template'. At the bottom right, there are 'Cancel' and 'Save' buttons.

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

New Activity List

---

\*Activity List Name:  \*Template:

\*Related Record Id:

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

The screenshot shows the account record for FCS Maroubra. The account is active and managed by OPS Field Manager. The account owner is Bill Smith. The account details include billing address, status, and business information. The activity section shows a 'Next Steps' section with two tasks: 'New Franchisee Induction course' and 'Issue New Franchisee Information For...'. The 'Activity Lists' section shows the 'Maroubra Growth Initiative' with 5 tasks and 0 completed tasks.

NAME	NUMBER OF TASKS	COMPLETED TASKS
Maroubra Growth Initiative	5	0

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

# Working with activity list tasks

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

The screenshot shows the Salesforce interface for the account 'FCS Maroubra'. The page is divided into several sections:

- Account Header:** Shows the account name 'FCS Maroubra', status 'Active', and a 'Create New Job' button.
- DETAILS:** A table of account information including:
  - Account Name: FCS Maroubra
  - Parent Account: FCS NSW
  - Status: Active
  - Field Manager: OPS Field Manager
  - Next Review Due Date: 31/08/2018
  - Business Information: Legal Entity Name (Smith Services Pty Ltd), Business Number (123456666), Company Number (66123456666)
  - Address Information: Billing Address (Level 1, Suite 4/166 Rd, Maroubra NSW 2035, Australia)
- ACTIVITY:** A section for logging activities with options for 'Log a Call', 'New Event', 'New Task', and 'Email'. It includes a 'Create new...' field and an 'Add' button.
- Next Steps:** A section highlighting upcoming tasks:
  - New Franchisee Induction course (04/07) - Bill Smith has an upcoming Task
  - Issue New Franchisee Information For... (Tomorrow) - Bill Smith has an upcoming Task
- Past Activities:** A section showing a past activity: 'Job Offer JON-00025' (7:00 AM | 07/10/2017) - Integration User sent an email to Bill Smith.
- Activity Lists:** A table summarizing activity lists:

NAME	NUMBER OF TASKS	COMPLETED TASKS
Maroubra Growth Initiative	5	0

## To view more details about an individual task:

» Click the task arrow to reveal more information.

The screenshot displays a CRM interface for an account named 'FCS Maroubra'. The interface is divided into several sections:

- Account Header:** Shows the account name 'FCS Maroubra', status 'Active', and a 'Create New Job' button.
- Account Details:** A table of fields including Billing Address, Status, Status Reason, Account Name, Parent Account, Status, Status Reason, Inactive Reason, Field Manager, Timezone, Next Review Due Date, and Next Review Date.
- Business Information:** A section containing Legal Entity Name, Business Number, Trading Name, and Company Number.
- Address Information:** A section containing Billing Address and Shipping Address.
- Activity Section:** Contains a 'Log a Call' button, filters, and a 'Next Steps' list. A task titled 'New Franchisee Induction course' is highlighted with a green box. The task description reads: 'The franchisee owner is booked into the induction training course.' Below it is another task 'Issue New Franchisee Information For...'. There is also a 'Past Activities' section with a task 'Job Offer JON-00025'.
- Activity Lists:** A table at the bottom right showing a list of activity lists with columns for NAME, NUMBER OF TASKS, and COMPLETED TASKS.

NAME	NUMBER OF TASKS	COMPLETED TASKS
Maroubra Growth Initiative	5	0

To reveal more tasks:

» Press More Steps.

The screenshot displays the 'Operations Management' interface for the account 'FCS Maroubra'. The top navigation bar includes 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Payments', 'Expenses', 'Jobs', 'Job Offers', and 'More'. The account details section shows 'FCS Maroubra' with a status of 'Active' and a billing address in Maroubra, NSW, Australia. The 'DETAILS' tab is active, showing fields for Account Name, Parent Account, Status, and various contact information. The 'ACTIVITY' tab is also visible, showing a list of tasks. A green box highlights the 'Next Steps' section, which includes tasks like 'Issue Operations & OH&S Documents', 'New Franchisee Induction course', and 'Issue New Franchisee Information For...'. A green arrow points to the 'More Steps' link next to the 'Next Steps' header. Below the activity list is an 'Activity Lists' table with columns for NAME, NUMBER OF TASKS, and COMPLETED TASKS.

NAME	NUMBER OF TASKS	COMPLETED TASKS
Maroubra Growth Initiative	5	0

To mark a task as complete:

» Check the task check box.

The screenshot displays the 'FCS Maroubra' account page. The left sidebar contains 'DETAILS' and 'RELATED' sections. The 'DETAILS' section includes fields for Account Name, Parent Account, Status, Inactive Reason, Field Manager, Next Review Due Date, Business Information, Address Information, and Invoice Summary Information. The right sidebar contains 'ACTIVITY' and 'CHATTER' sections. The 'ACTIVITY' section has a 'Next Steps' list with three items: 'Issue Operations & OH&S Documents' (checked), 'New Franchisee Induction course', and 'Issue New Franchisee Information For...'. A green arrow points to the checked checkbox. Below the activity list is an 'Activity Lists' table.

NAME	NUMBER OF TASKS	COMPLETED TASKS
Maroubra Growth Initiative	5	0

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

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

The screenshot shows a CRM interface for an account named 'FCS Maroubra'. The account is active and managed by 'OPS Field Manager'. The right-hand panel displays a list of activities, with one entry highlighted in green: 'Issue Operations & OH&S Documents' on 04/07, where 'Bill Smith had a Task'. Below this is a table of activity lists.

NAME	NUMBER OF TASKS	COMPLETED TASKS
Maroubra Growth Initiative	5	1



# CHAPTER 14

## Working with Reports

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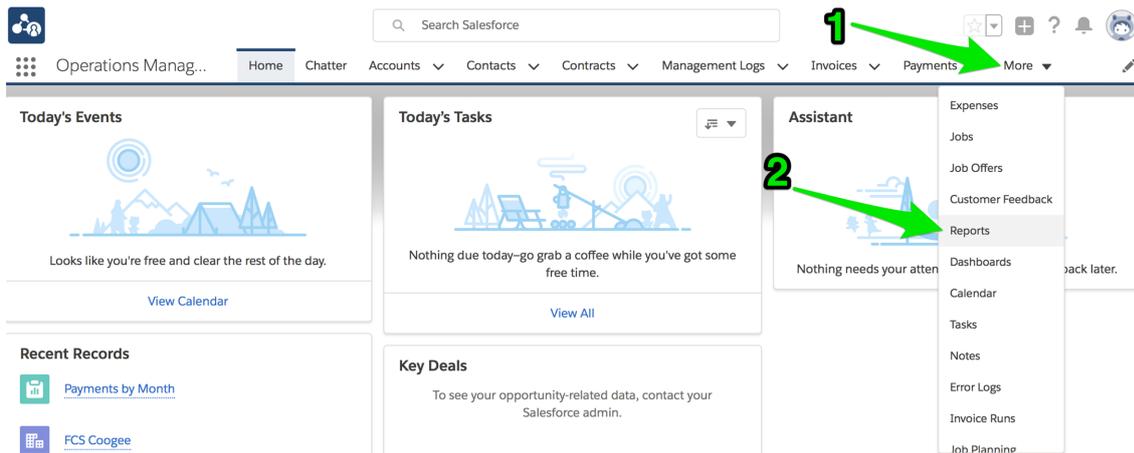
# Understanding reports

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

Operations Management ships with a range of reports tailored to operations.

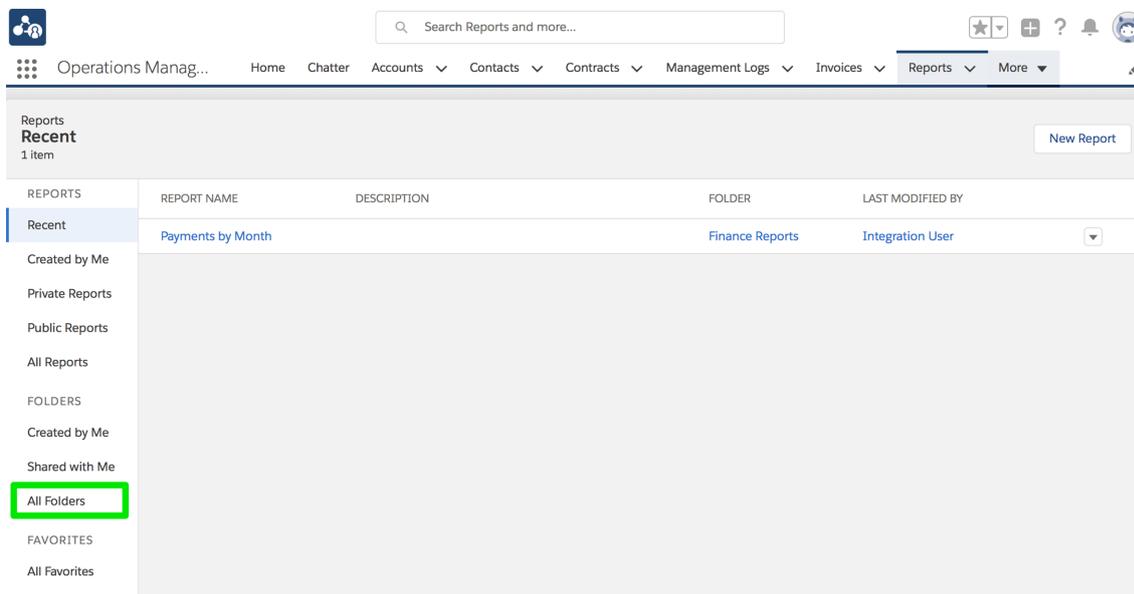
## To discover available reports

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



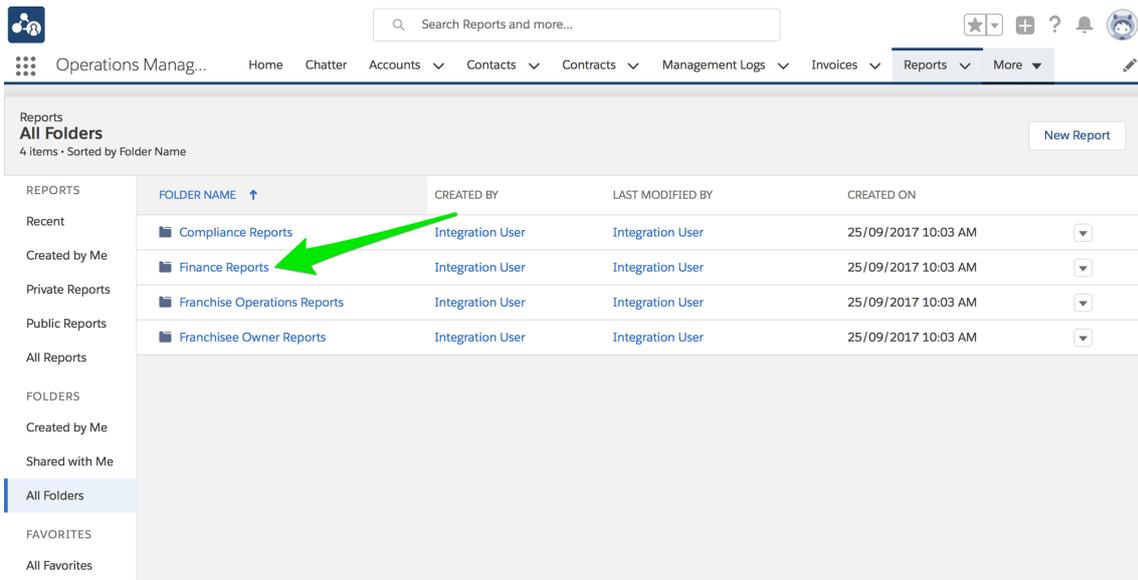
The recent reports folder appears. If you have yet to use a report, this will be blank.

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



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

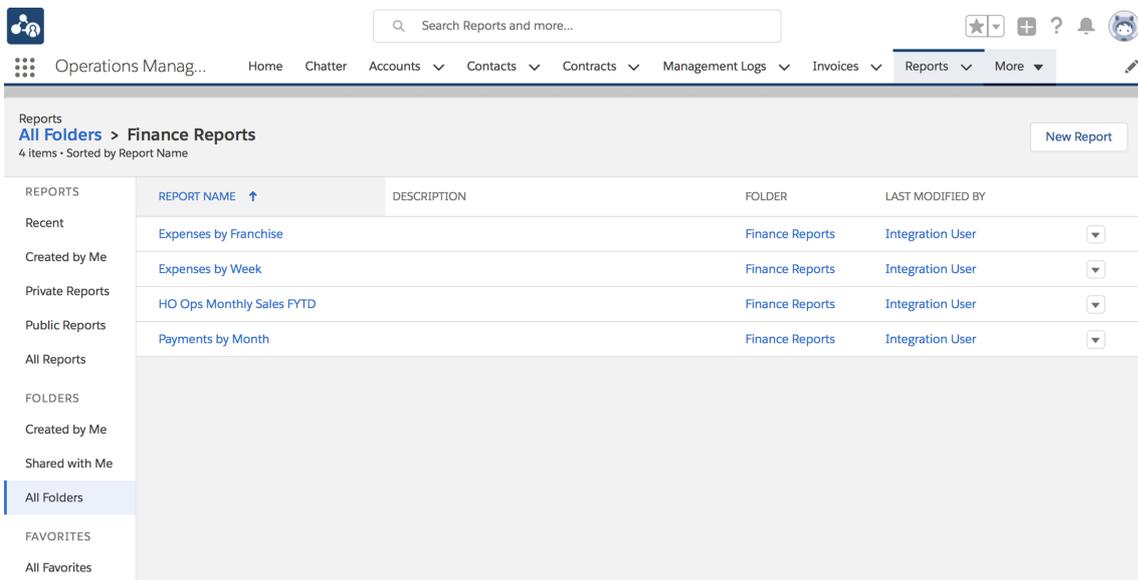
### 3. Select any one of the report folders.



The screenshot shows the 'Reports' page in a software application. The page title is 'Reports All Folders' with a subtitle '4 items • Sorted by Folder Name'. A search bar is at the top with the text 'Search Reports and more...'. The navigation menu includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Reports', and 'More'. A 'New Report' button is in the top right. The main content area is a table with columns: 'REPORTS', 'FOLDER NAME', 'CREATED BY', 'LAST MODIFIED BY', and 'CREATED ON'. The table lists four folders: 'Compliance Reports', 'Finance Reports', 'Franchise Operations Reports', and 'Franchisee Owner Reports'. A green arrow points to the 'Finance Reports' folder. The left sidebar has categories: 'RECENT', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'Created by Me', 'Shared with Me', 'All Folders', 'FAVORITES', and 'All Favorites'. The 'All Folders' category is selected.

REPORTS	FOLDER NAME	CREATED BY	LAST MODIFIED BY	CREATED ON
Recent	Compliance Reports	Integration User	Integration User	25/09/2017 10:03 AM
Created by Me	Finance Reports	Integration User	Integration User	25/09/2017 10:03 AM
Private Reports	Franchise Operations Reports	Integration User	Integration User	25/09/2017 10:03 AM
Public Reports	Franchisee Owner Reports	Integration User	Integration User	25/09/2017 10:03 AM

Now you can see the reports within that folder.



The screenshot shows the 'Reports' page with the 'Finance Reports' folder selected. The page title is 'Reports All Folders > Finance Reports' with a subtitle '4 items • Sorted by Report Name'. The search bar and navigation menu are the same as in the previous screenshot. The 'New Report' button is also present. The main content area is a table with columns: 'REPORTS', 'REPORT NAME', 'DESCRIPTION', 'FOLDER', and 'LAST MODIFIED BY'. The table lists four reports: 'Expenses by Franchise', 'Expenses by Week', 'HO Ops Monthly Sales FYTD', and 'Payments by Month'. The left sidebar is the same as in the previous screenshot, with 'All Folders' selected.

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY
Recent	Expenses by Franchise		Finance Reports	Integration User
Created by Me	Expenses by Week		Finance Reports	Integration User
Private Reports	HO Ops Monthly Sales FYTD		Finance Reports	Integration User
Public Reports	Payments by Month		Finance Reports	Integration User

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

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

Reports  
Recent  
4 items

New Report

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY
Recent	Payments by Month		Finance Reports	Integration User
Created by Me	HO Ops Monthly Sales FYTD		Finance Reports	Integration User
Private Reports	Expenses by Week		Finance Reports	Integration User
Public Reports	Expenses by Franchise		Finance Reports	Integration User
All Reports				
FOLDERS				
Created by Me				
Shared with Me				
All Folders				
FAVORITES				
All Favorites				

# Standard reports

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

## Compliance reports

Report Name	Description
Activated by Month	A summary of contracts organized by activation month, together with key details that characterize contract status.
Activated Contracts by Type	A summary of contracts organized by type, together with key details that characterize contract status.
Compliance - 14 Days from Issue	Listing all contract documents whose signing date is less than 14 days after documents issued vs those contracts whose signing date is greater than 14 days after documents issued.
Deactivated by Month	A summary of contracts organized by deactivation month, together with key details that characterize contract status.
Deactivation in Progress	A summary of contracts with the status <i>Deactivation in Progress</i> , together with key details that characterize contract status.
Deposit Due	A list of franchise profile accounts owing money on the initial deposit.
Open Contracts by Franchise	An historical listing of contracts by franchisee, with a histogram of the number of contracts issued to each franchisee.
Open Contracts by Type	A histogram showing contract start date, secondarily grouped by contract type.
Signed Agreements by Type	The current contracts whose <i>Status</i> is <i>Signed</i> .
Upcoming renewals - Next 3 Months	Contracts due for renewal in the next three months.
Upcoming renewals - Next 6 Months	Contracts due for renewal in the next six months.

## Franchise Operations Reports

Report Name	Description
Job Request Conversion	Job requests categorized by <i>Converted</i> and <i>Unconverted</i> Status.

Report Name	Description
Job Requests in and out	Number of Job Offers by month in <i>Owned</i> and <i>Unowned</i> Territories.
Pending Quotes & Work in Progress	Summary of Job Plans that are pending a decision from the customer.
Quote Conversion %	Number and Value of Jobs that are <i>Converted</i> vs. those that are <i>Unconverted</i> .

## 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.

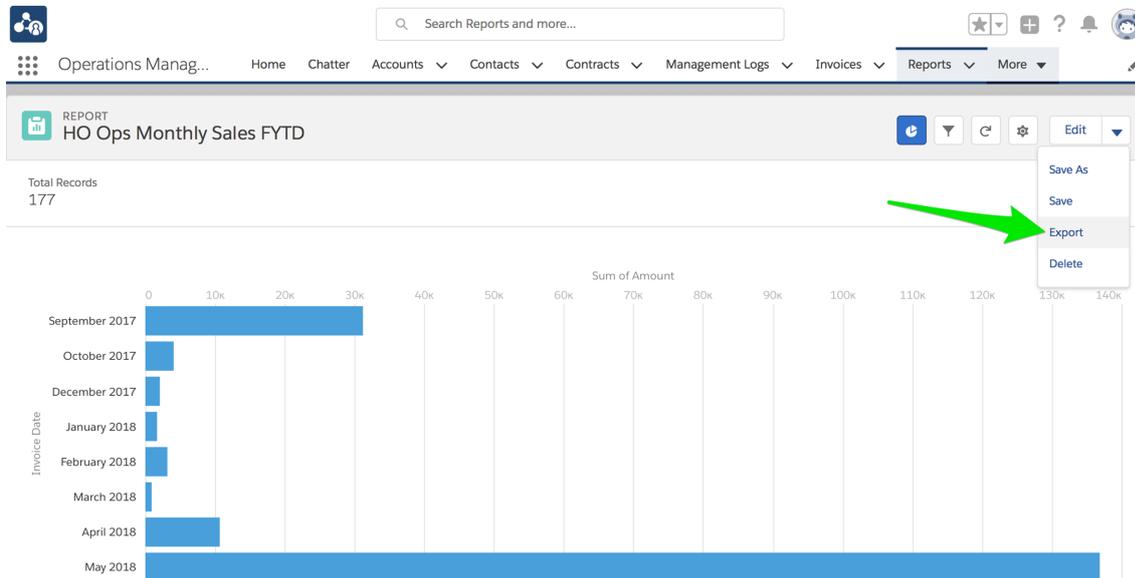
Report Name	Description
Envelopes by Sender YTD	Total envelopes sent this year to date by sender.
In Progress Envelopes	Envelopes sent and not voided, deleted or completed.
In Progress Envelopes Older than 72 Hours	All envelopes sent and not completed, deleted or voided 72 or more hours ago.
Percent 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.

Export

---

Export View

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

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

Format  
Excel Format .xlsx

Cancel Export

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

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

Export

---

Export View

**Formatted Report**

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

**Details Only**

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

Format: Excel Format .xls      Encoding: ISO-8859-1 (General US & Western Europe)

CancelExport



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

# How to print a report

To print a report

1. Export the report. See “How to export a report” on page 325.
2. Print it using Excel.



# CHAPTER 15

## Accessing Help and Support

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# Product Documentation

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

The first port of call should always be [our comprehensive video tutorials and user guides](#).

## Knowledge Base

Franchise Cloud Solutions maintains a Knowledge Base covering

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

Customers can [access the Knowledge Base](#) at any time.

# Contacting Customer Support

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



Customers can also reach our support team by sending email to  
» [service@franchisecloudsolutions.com](mailto:service@franchisecloudsolutions.com)

## Raising Service Requests

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

Service Desk / Franchise Cloud Solutions

### Franchise Cloud Solutions

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

What can we help you with?



**How do I...**

Help using our products.



**Technical support**

Help installing, configuring, or troubleshooting.



**Report a bug**

Tell us the problems you're experiencing.



**Suggest improvement**

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



**Suggest a new feature**

Let us know your idea for a new feature.



**Licensing and billing questions**

Choose this if you have questions about licensing or billing.



**Other questions**

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

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

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

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

## How to Suggest Improvements or Features

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

We would like to know:

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



Most people only tell us #3.

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

## How to Report a Bug

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



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

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

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

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

### What is a useful bug report?

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



Some of this depends on getting high quality information from you.

**Here's how you can help us help you!**

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

When you log a bug, please remember to describe only a single bug in a service request.

**Feel free to raise as many issues as you need!**

Here are some tips on writing a good bug report.

### How to write a good bug report

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

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

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

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

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

## Example Bug Report (minimal)

### Summary

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

### Description

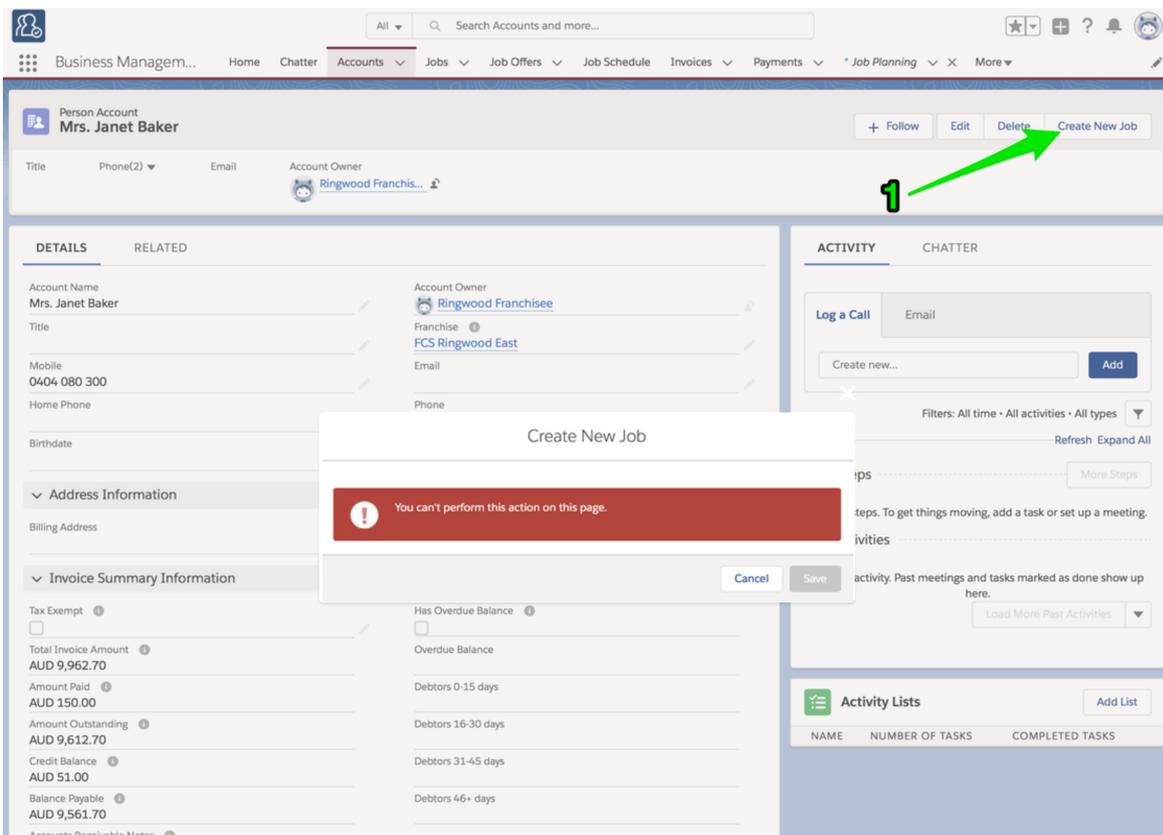
Cannot create new job from a customer's Account page.

*To replicate:*

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

**EXPECT:** A new job to be created.

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



### Environment

Sandbox.

Google Chrome.

Desktop (Windows 10).

## Example Bug Report (technical details)

### Summary

Accounts with Financial Integration throw component error on page load

### Description

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

Component error throws in both Chrome and Safari.

I'm logged into Golden UAT as system administrator.

### To replicate

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

**EXPECT:** FCS Ringwood East account displays.

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

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

```
H.validateSelection()@https://fcsopsgoldenut-dev-ed.lightning.force.com/components/lightning/dualListbox.js:2:17398
H.getValidity()@https://fcsopsgoldenut-dev-ed.lightning.force.com/components/lightning/dualListbox.js:2:9567
```

### Error details

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

Message

markup://lightning:dualListbox

Component Descriptor

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

Function

H.validateSelection

Stack Trace

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

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

## Environment

Production

Google Chrome OR Safari (BUT NOT Firefox).

MacOS 10.13.

## Example Bug Report (medium complexity replication)

### Headline

Events on job calendar are clickable only once per instantiation.

### Description

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

*To replicate:*

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

**EXPECT:** Event dialog to re-appear.

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

*Further:*

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

**EXPECT 1:** Event dialog to re-appear.

**EXPECT 2:** Event object unclickable.

**ACTUAL:** Event object is not clickable.

### Environment

Safari & Chrome

Mac OS 10.12

### Business Impact

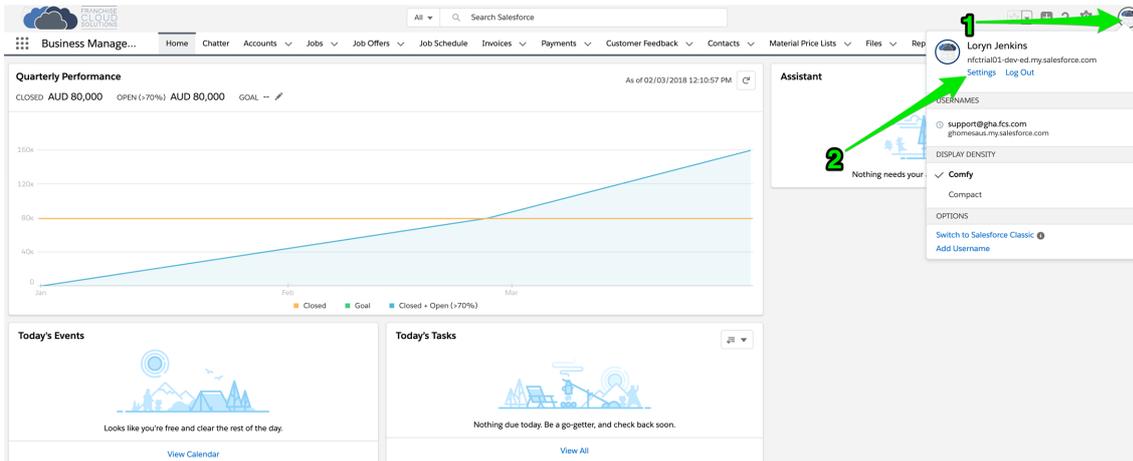
- » Who affected: All franchisees, Users of Job Calendar.
- » Visibility: 40 times per month per franchisee.
- » Block: None.

# Granting Account Login Access

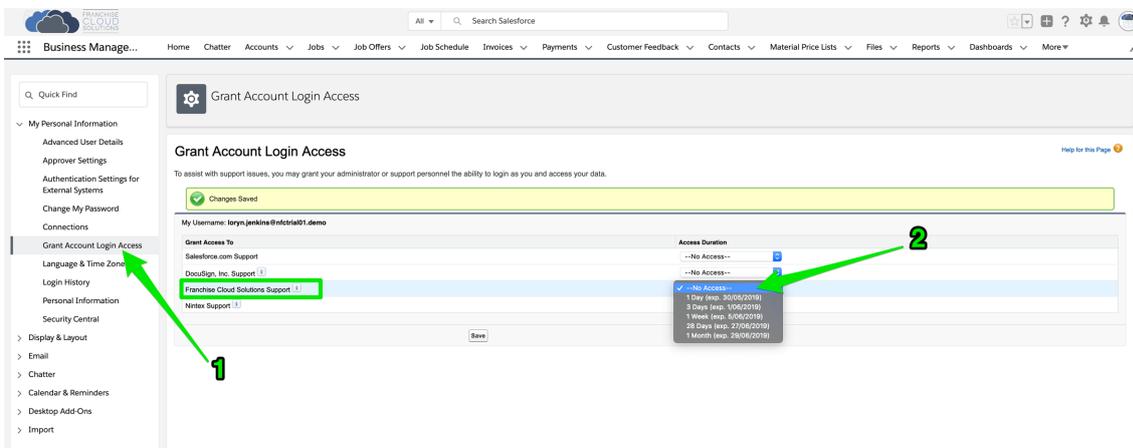
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

To provide our customer support team access to your system

1. Select your account **Settings**.



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



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

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

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



You can revoke access at any time.