



SMS Management Administration Guide

version 1.06



FranchiseOps version 1.89

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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

SMS Management is an application that extends Franchise Cloud Solutions's Operations Management application, which runs within the award-winning and market-leading Salesforce Platform.

SMS Management provides the ability to connect Operations Management to an SMS Gateway to enable ad hoc, templated and scripted SMS communications with customers, franchisees, and their employees and contractors.

Where to start

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

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

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

This guide is to be read in conjunction with

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

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

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

CHAPTER 2

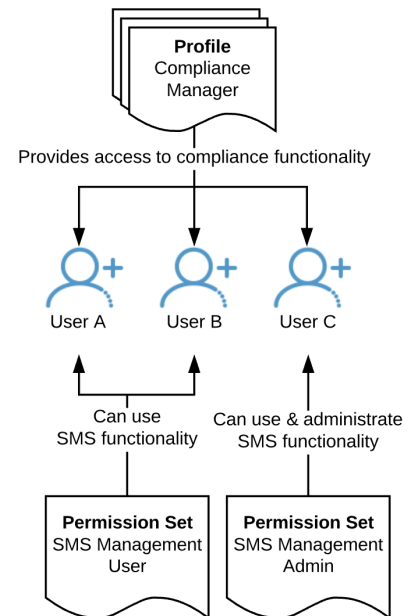
Configuring SMS Management

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Twilio Account Creation	5
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Configuring User Permissions

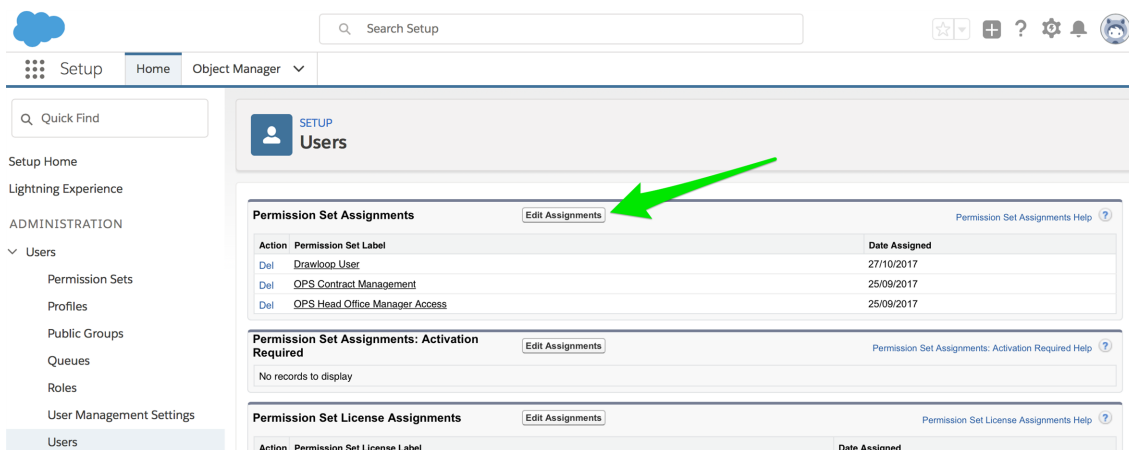
There are two sets of permissions for SMS Management

- » SMS Management User
- » SMS Administration User



To grant a user SMS Management User or SMS Management Admin permissions

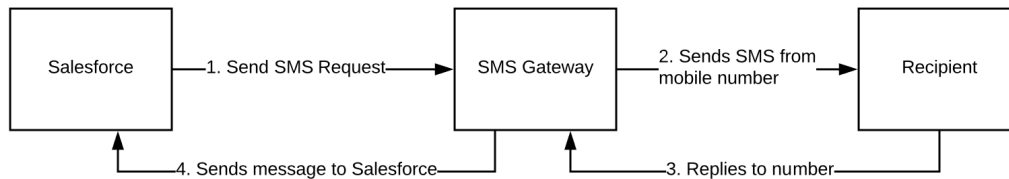
1. Open the Salesforce **Users** list page (**Setup > Users > Users**).
2. Select a user by clicking on their **Full Name**.
3. Scroll down to the **Permission Set Assignments** section.
4. Press the **Edit Assignments** button.



5. From **Available Permission Sets** list, select either the *SMS Management Admin* or the *SMS Management User*, and **Add** it to the **Enabled Permission Sets** list.
6. Press **Save**.

Configuring SMS Gateway

SMS Management uses an SMS Gateway in order to send and receive SMSs.



SMS Management currently supports the Twilio SMS Gateway. Configuring an SMS Gateway requires configuration on Twilio and within SMS Management.



You may need to perform these configuration steps for each Master Franchise.

Twilio Account Creation

To obtain a Twilio account

1. [Create an account using Twilio.](#)
2. Complete the on-screen instructions to obtain the account.

Configuring Twilio for Multiple Master Franchises

You may very well want to create separate Twilio accounts to support

- » Using different SMS numbers for different countries
- » Using a separate Twilio account for each Master Franchise to obtain independent reporting

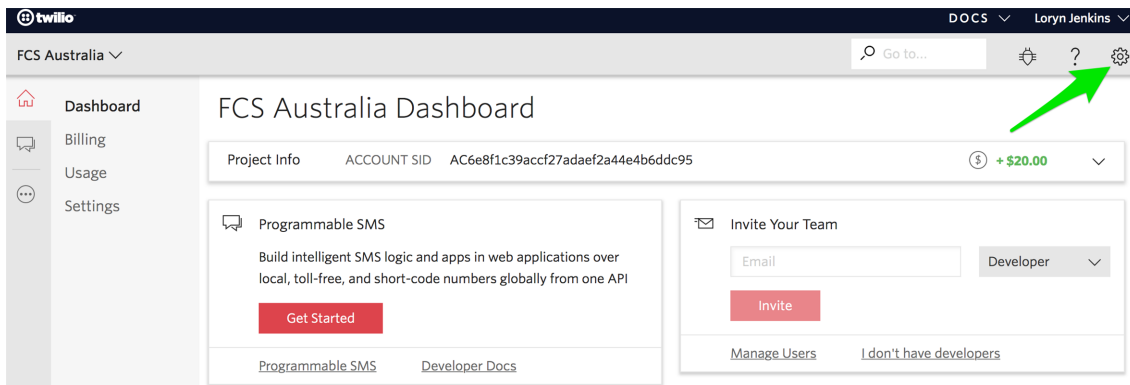
In either case, you do this by creating separate Twilio subaccounts.



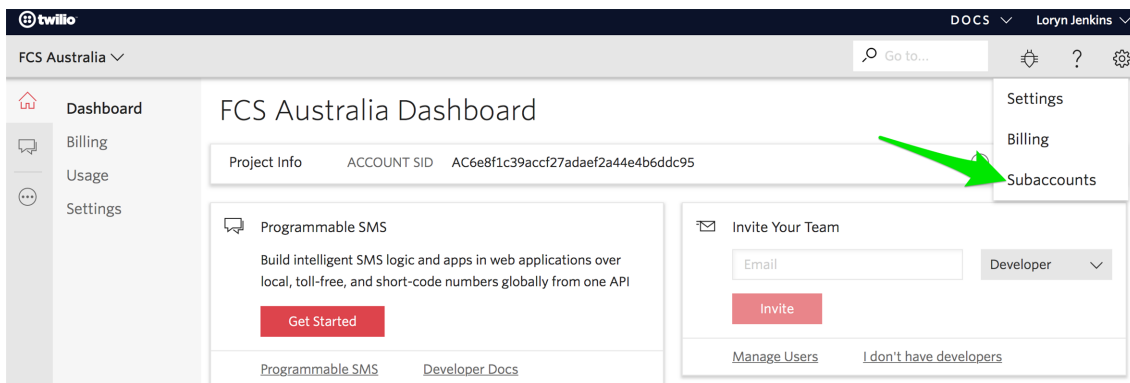
Only one configuration set may have details for a single Twilio account. If more than one configuration set has the same Twilio account credentials (e.g. CN-00000 and CN-00001), SMS responses will fail.

To create a separate Twilio subaccount

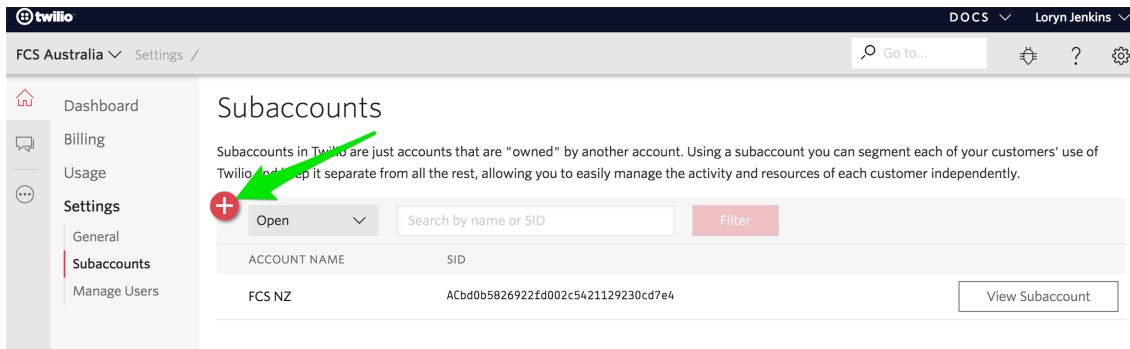
1. From your Twilio account, select the **Settings** menu.



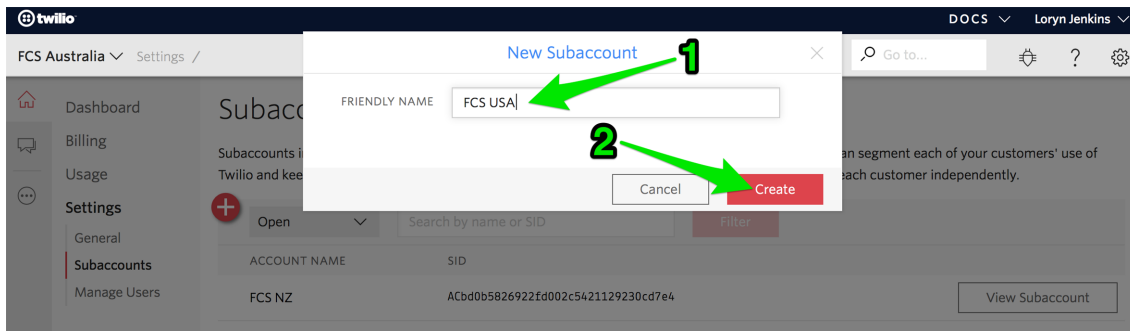
2. Now choose **Subaccounts**.



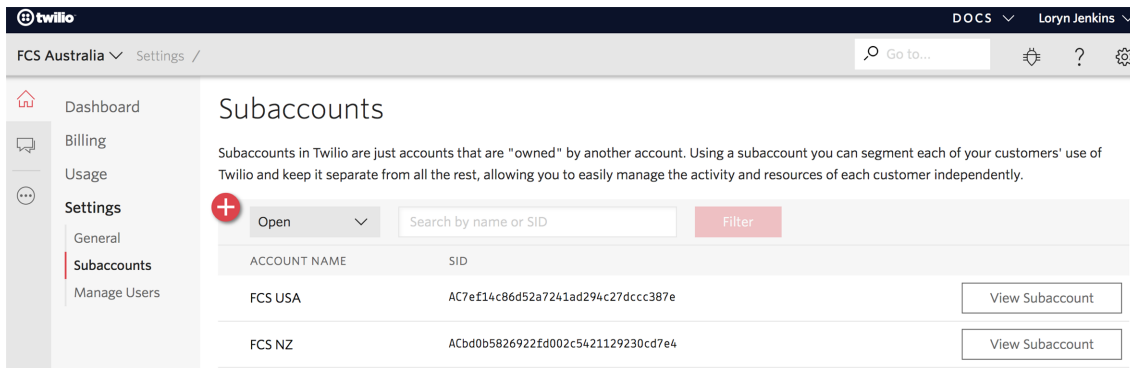
3. If this is not your first subaccount, press the **Plus** button.



4. Enter a **Friendly Name** for your subaccount, then press **Create**.



Twilio displays the newly created subaccount.

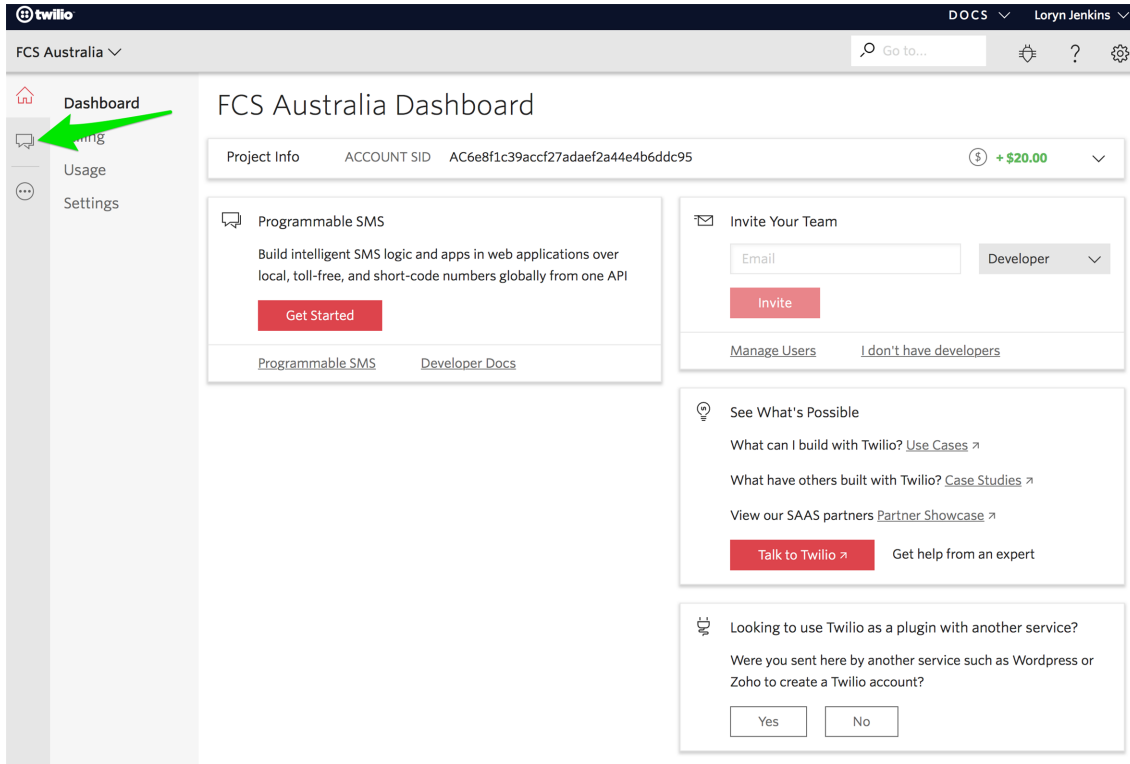


Now that you have created one or more subaccounts, simply create the SMS services within each subaccount. See “Configuring a Twilio Gateway” on the next page.

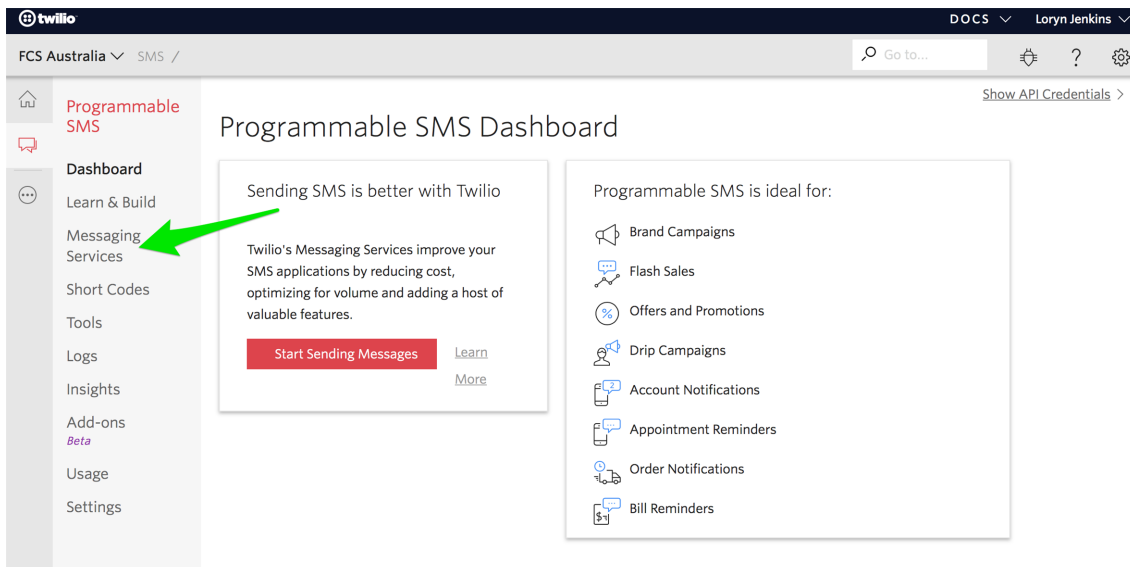
Configuring a Twilio Gateway

To set up your first SMS Gateway Service

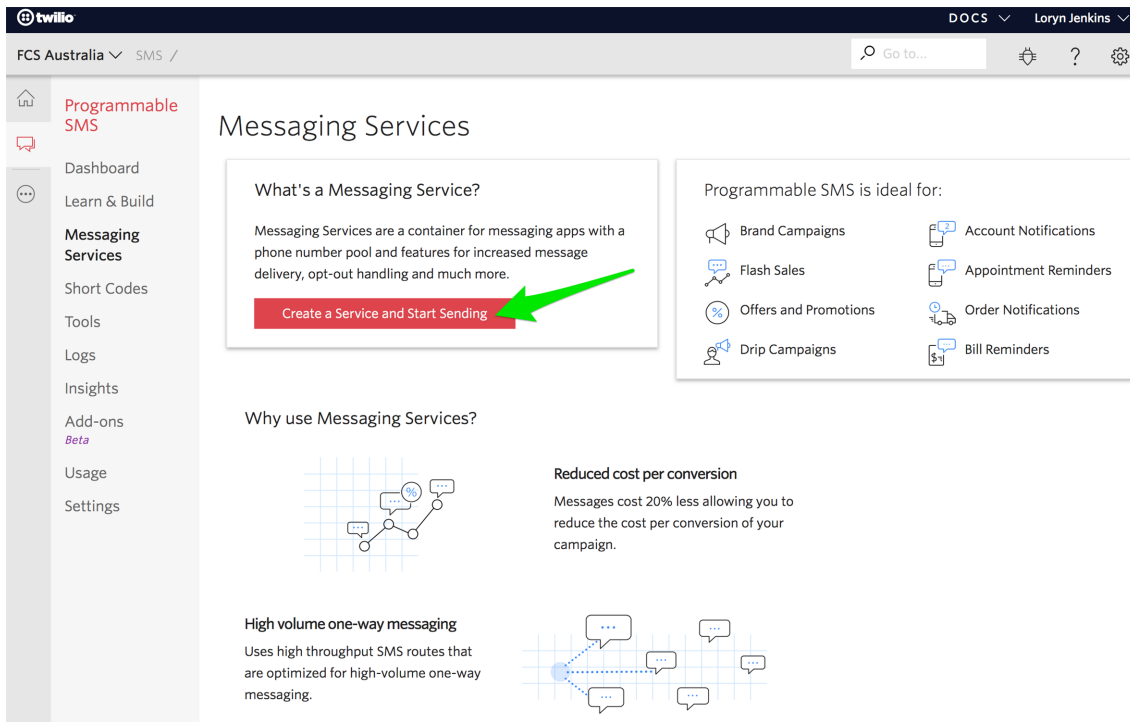
1. Log into your Twilio account.
2. Go to the **Programmable SMS Service** shortcut.



3. Choose the **Messaging Services** item.

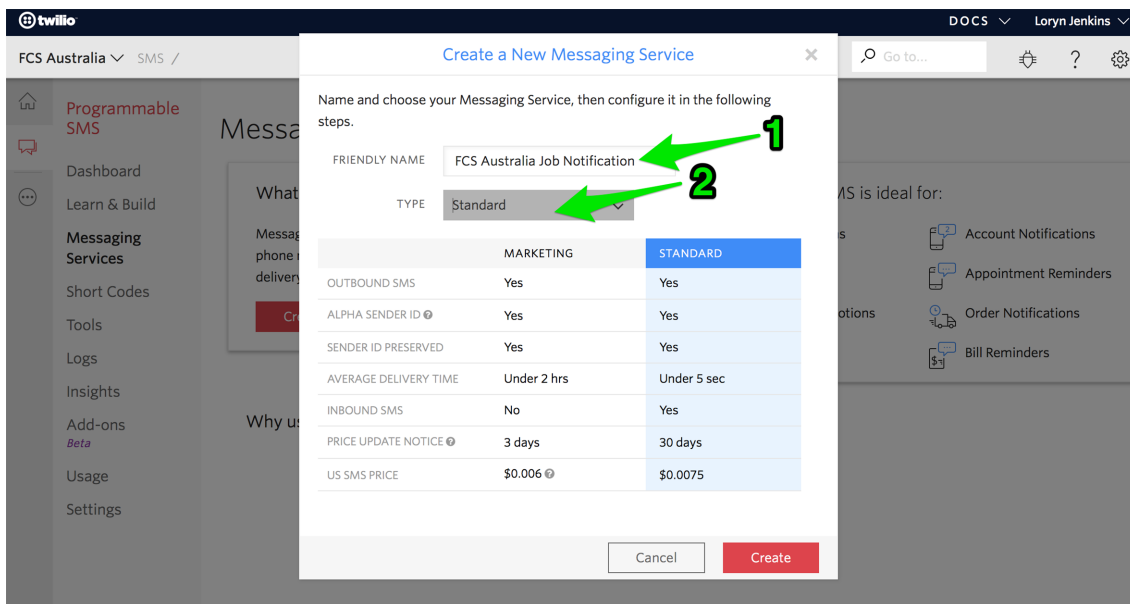


4. Choose Create a Service and Start Sending.



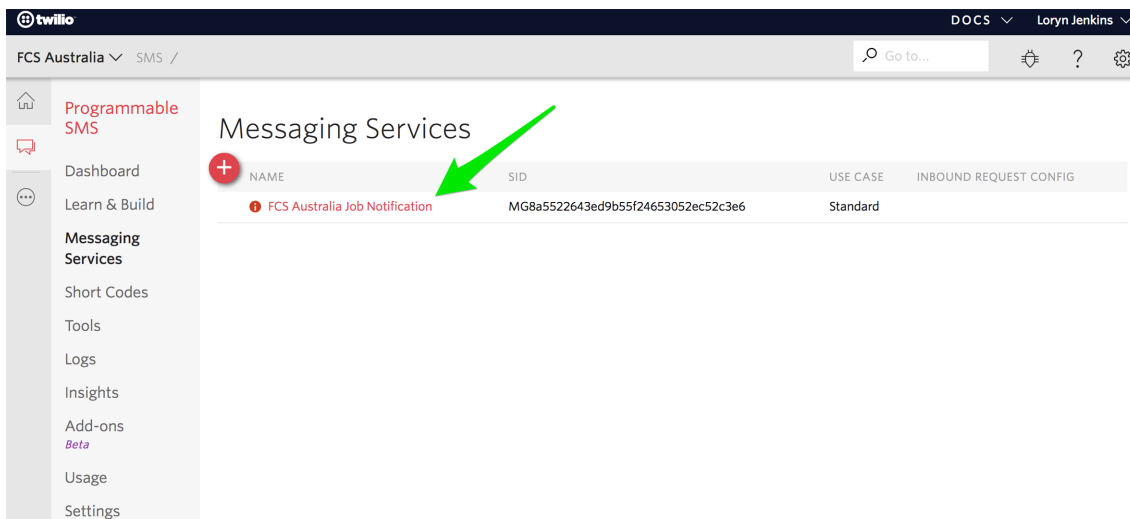
The **Create a New Messaging Service** dialog box appears.

5. Enter a Friendly Name for the service and choose Type *Standard*, then press **Create**.

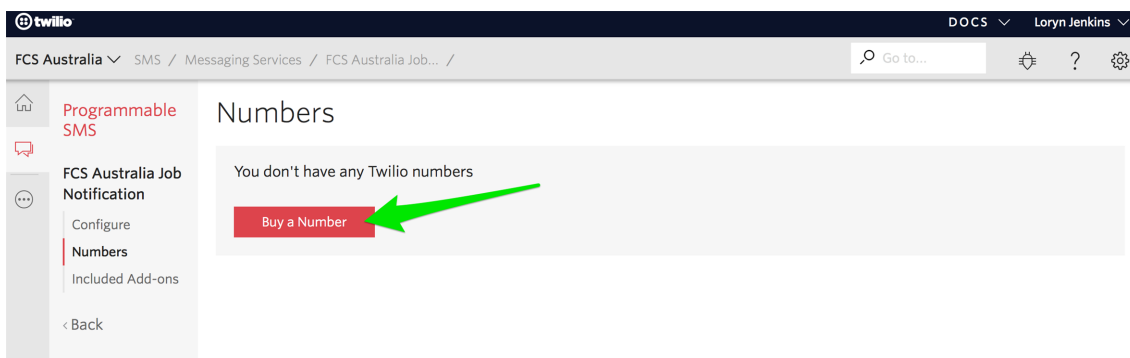


The messaging service is displayed.

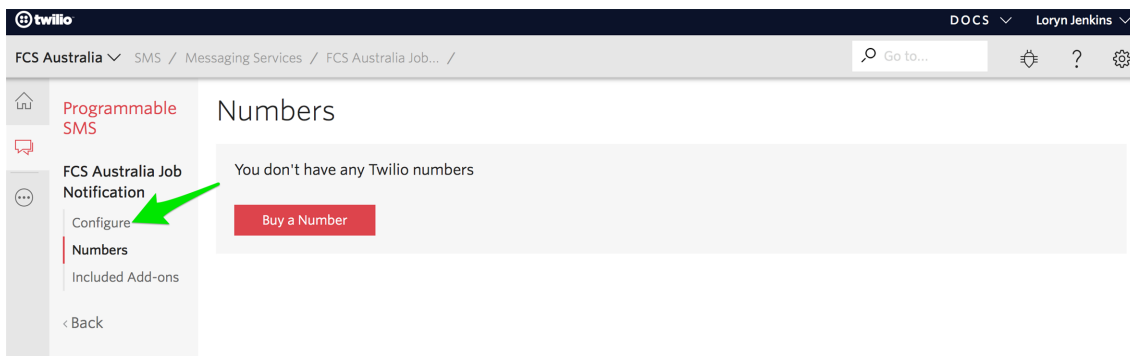
6. Select the newly added **Messaging Service**.



7. Click the **Buy a Number** button and follow the on-screen instructions to purchase the number.



8. Select **Configure**.



9. Note the MPU SID value.

The screenshot shows the Twilio console interface for configuring a Programmable SMS service. The main heading is 'FCS Australia Job Notification'. On the left, a sidebar contains links for 'Configure', 'Numbers', and 'Included Add-ons'. The 'Configure' section is active, showing a form with the following fields:

Properties	
FRIENDLY NAME	FCS Australia Job t
MPU SID	MG8a5522643ed9b55f24653052ec52c3e6
TWO WAY	Yes
SENDER ID	Required, Preserved
USE CASE	Standard
AVERAGE DELIVERY TIME	< 5s
ALLOWED SENDERS	Shortcode, Longcode, Alphanumeric Sender ID

Below the form are three expandable sections: 'Inbound Settings', 'Outbound Settings', and 'Included Add-ons'. At the bottom, there are three buttons: 'Save' (red), 'Cancel', and 'Delete this Messaging Service'.

10. Open the **Inbound Settings** pane.

11. Check the **Process Inbound Messages** checkbox.

12. In Request URL, enter `https://+ [Salesforce Site Url] +/services/apexrest/v1/twilio/journey`

twilio DOCS Loryn Jenkins

FCS Australia SMS / Messaging Services / FCS Australia Job... /

Go to...

Programmable SMS

FCS Australia Job Notification

Configure

Numbers

Included Add-ons

< Back

FCS Australia Job Notification

Test Messaging Service

Collapse All Expand All

Properties

FRIENDLY NAME	FCS Australia Job t	TWO WAY	Yes
MPU SID	MGBa5522643ed9b55f24653052ec52c3e6	SENDER ID	Required, Preserved
USE CASE	Standard	AVERAGE DELIVERY TIME	< 5s
ALLOWED SENDERS	Shortcode, Longcode, Alphanumeric Sender ID		

Inbound Settings

PROCESS INBOUND MESSAGES ☒ If enabled, Twilio will make a synchronous HTTP request to your Request URL for each message you receive.

REQUEST URL HTTP POST

FALLBACK URL HTTP POST

Outbound Settings

Included Add-ons

Save Cancel Delete this Messaging Service

13. Now go to **Settings**.

twilio DOCS Loryn Jenkins

FCS Australia SMS / Messaging Services / FCS Australia Job... /

Go to...

Programmable SMS

FCS Australia Job Notification

Configure

Numbers

Included Add-ons

< Back

You have successfully updated your Messaging Service.

FCS Australia Job Notification

Settings

Billing

Subaccounts

Properties

FRIENDLY NAME	FCS Australia Job t	TWO WAY	Yes
MPU SID	MGBa5522643ed9b55f24653052ec52c3e6	SENDER ID	Required, Preserved
USE CASE	Standard	AVERAGE DELIVERY TIME	< 5s
ALLOWED SENDERS	Shortcode, Longcode, Alphanumeric Sender ID		

14. Authenticate if needed, and note the Account SID and Auth Token values. (Click on Auth Token to reveal the value.)

The screenshot shows the Twilio console interface for the 'FCS Australia' project. The left sidebar contains navigation links: Dashboard, Billing, Usage, Settings (selected), General, Subaccounts, and Manage Users. The main content area is titled 'General Settings' and includes sections for Properties, Two-Factor Authentication, and API Credentials.

Properties

- PROJECT NAME: FCS Australia
- ACCOUNT SID: AC6e8f1c39accf27adaef2a44e4b6ddc95

Two-Factor Authentication

Add an extra layer of protection to your project, with a verification code sent via SMS or voice call.

- ☒ **DISABLED** Do not require a verification code
- ☐ **ONCE PER COMPUTER** Trust computers and only ask for verification code every 30 days
- ☐ **EVERY LOG-IN** We'll always ask for a verification code

API Credentials

LIVE Credentials [Learn about REST API Credentials](#)

- ACCOUNT SID: AC6e8f1c39accf27adaef2a44e4b6ddc95
Used to exercise the REST API
- AUTH TOKEN: [masked]
[Request a Secondary Token](#)
Keep this somewhere safe and secure

TEST Credentials [Learn about Test Credentials](#)

- TEST ACCOUNT SID: AC71aa2e79bcce0b6e5619e539edb4878d
Used to exercise the REST API
- TEST AUTHTOKEN: [masked]
Keep this somewhere safe and secure

Your Twilio gateway is now set up. You are now ready to configure the SMS Management side of the configuration. See “SMS Management Gateway Configuration” below.

SMS Management Gateway Configuration

It is necessary to configure SMS Management to interact with the SMS Gateway. If you have configured the SMS Gateway and noted the MPU SID, Account SID and Auth Token values, you are ready to configure the SMS Management Configuration. If not, See “Configuring SMS Gateway” on page 5.

To configure SMS Management Gateway Configuration

1. From the **SMS Management** app, select the **Account** tab, and select the account for the Master Franchise for which you want to configure the SMS Gateway.

The screenshot shows the 'Accounts' tab selected in the top navigation bar. Below the navigation bar, there is a search bar and a list of accounts. The 'FCS Australia' account is highlighted in the 'Recently Viewed' section.

ACCOUNT NAME	PHONE	EMAIL	BILLING SUBURB	BILLING ST...	ACCOUNT O...
1 FCS Australia					ooffi
2 FCS NSW			Sydney	NSW	ooffi
3 FCS - Sans Souci	0421788574	kerryn.miler@franchisecloudsolutions.com	Bexley	NSW	jfo
4 Territory - Camden	0424463511		North Sydney	NSW	cooper
5 Tile Rescue Balmain	0424163136	shane@franchisecloudsolutions.com	Birchgrove	NSW	jfo
6 FCS Bondi Beach	0411123456	simon.walker@gmail.com	Bondi	NSW	swalker

2. From the **Account**, scroll down to the **Other Information** section and click through to the **Configuration Set**.

The screenshot shows the 'FCS Australia' account page. In the 'Other Information' section, the 'Configuration Set' is set to 'CN-00166'.

Survey Frequency (Days)	Referrer
0	

Insurance End Date	Source

Initial Contact Date	Configuration Set
	CN-00166

3. From **Configuration**, scroll down to the **SMS Settings** section.

The screenshot shows the 'CN-00166' configuration page. The 'SMS Settings' section is highlighted with a green box.

SMS Gateway	Direction
None	

Account SID	Mobile Number Country Code

Messaging Service SID	Escalation Owner
	Integration User

Authentication Token	Escalation Queue Name

SMS 1-Way Journey Name

SMS 2-Way Journey Name

4. Place the form in edit mode, then enter the settings as follows.
 - a. Select the *Twilio* item from the SMS Gateway list.
 - b. Place the *Account SID* value from Twilio into the Account SID field.
 - c. Place the *MPU SID* value from Twilio into the Messaging Service SID field.
 - d. Place the *Auth Token* value from Twilio into the Authentication Token field.
5. Press **Save**.

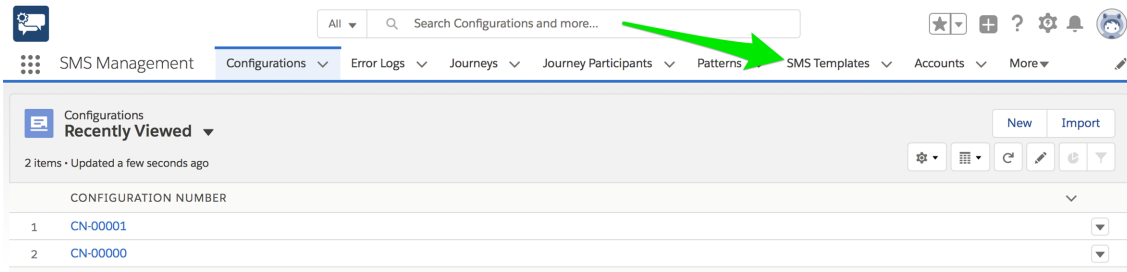
The SMS Gateway service is now configured and ready to test.

Configuring SMS Templates

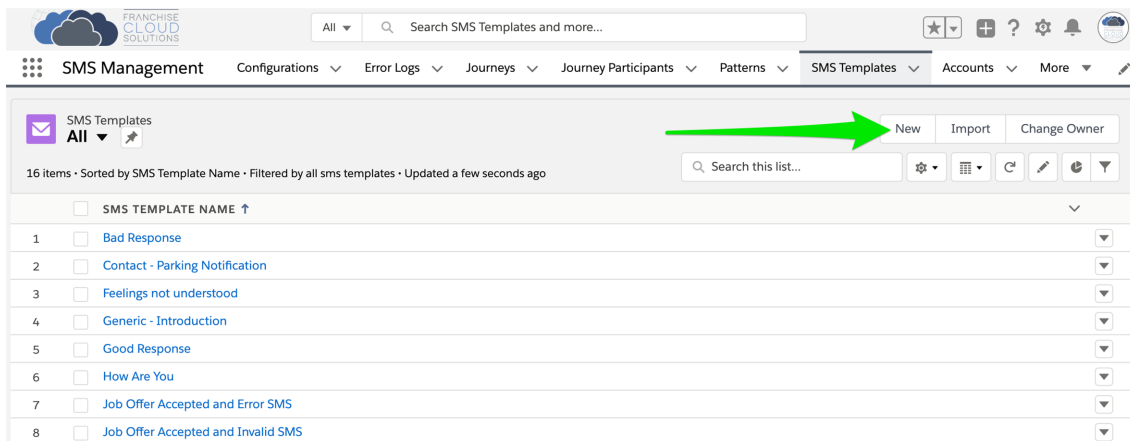
SMS Templates are used to create SMS mail merge templates. SMS Management comes with a default *Job Offer* template.

To create a new SMS Template

1. From the SMS Management app, select the SMS Templates menu.



2. From the SMS Templates list view, press New.



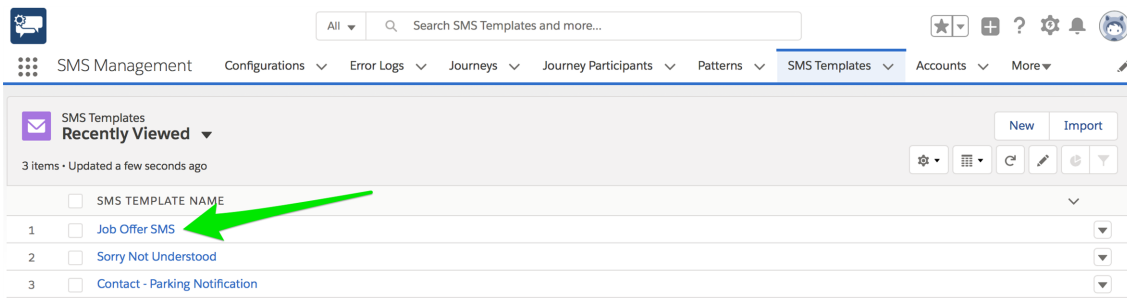
3. Name the template, then enter the text of the message.

A screenshot of the 'New SMS Template' form. The form has a title 'New SMS Template' and a section 'Information'. It contains two input fields: 'SMS Template Name' with the placeholder text 'Please move your vehicle' and 'Applicable Subject' with the placeholder text 'Please move your vehicle from the driveway'. There is also a checkbox labeled 'Available in SMS Composer' which is currently unchecked. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

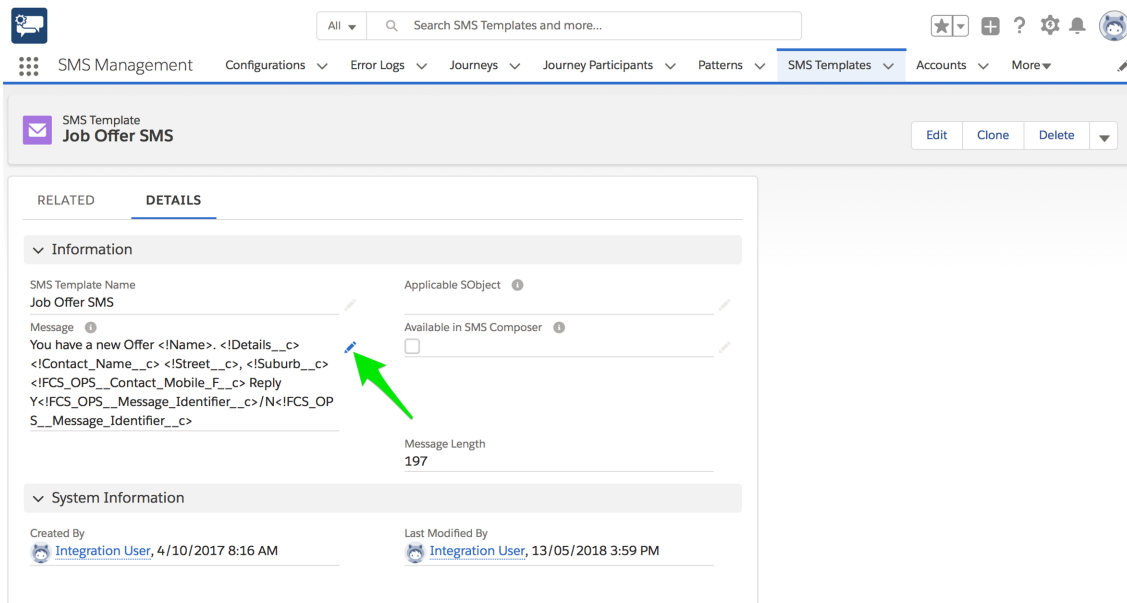
4. If you want the template to contain variables, then enter Field API Names wrapped in start `<!` and `>end` delimiters. To identify the Field API Name for any given field, See “How to identify a Field API Name” on page 54.
5. If you want this template to be available in SMS Composer, check Available in SMS Composer.
6. Press **Save**.

To modify an SMS Template

1. From the list of existing SMS Templates, select one.



2. To edit the message, edit the **Message** string then press **Save**.



Each field name is wrapped in a start <! and end > delimiter. The Field API Name is placed in between these delimiters. The most commonly used records are

- » Job Offer
- » Job
- » Contact
- » Account

To identify the Field API Name for any given field, See “How to identify a Field API Name” on page 54.

CHAPTER 3

Rapid SMS Messaging

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How to make an SMS template available in SMSComposer	28
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Understanding SMSComposer

SMS Management provides the ability for Head Office staff to rapidly send SMS messages directly from Salesforce to customers, employees, franchisees, and their employees and contractors. SMSComposer can send free form text messages. It can also be configured to use an available SMS Template for increased efficiency.



One typical example where this is useful is where a member of the public contacts Head Office with the complaint that a particular vehicle is blocking them in. A call center team member can search for the vehicle's registration plate, identify the contact, and immediately send an SMS message advising them to shift their vehicle.

Configuring SMSComposer

SMSComposer can be configured against any object in the system. When configured, the SMSComposer component appears whenever records of that type are opened within applications that have been granted access to it.

To prepare to configure SMSComposer

1. Obtain the Salesforce id value for the **Configuration** record that contains the SMS Gateway Settings. See “How to identify record ids” on page 52.
2. Obtain the Field API Name of the mobile phone number field for the target object. See “How to identify a Field API Name” on page 54.

To configure SMSComposer on an object

1. From the **Operations Management** application, go to an instance of the object type for which you are wanting to configure SMSComposer.



For example, open a Contact record.

2. Open the **Setup** menu and choose **Edit Page**.

The screenshot shows the Salesforce user interface. At the top, there's a navigation bar with tabs like 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', and 'Payments'. The 'Contacts' tab is active. Below the navigation bar, there's a 'Contact' record for 'Jack Franchise Owner'. The record details are shown in a table with fields like 'Title', 'Account Name', 'Phone(2)', 'Email', and 'Contact Owner'. The 'Setup' menu is open in the top right corner, showing options like 'Setup for current app', 'Service Setup', 'Developer Console', 'Edit Page', and 'Edit Object'. A green arrow labeled '1' points to the 'Setup' gear icon, and another green arrow labeled '2' points to the 'Edit Page' option in the dropdown menu.

3. Hover over and select the Activity pane.

The screenshot shows the Lightning App Builder interface for a 'Contact Record Page'. The left sidebar contains 'Lightning Components' with a search bar and a list of standard components. The main area displays the 'Contact' record for 'Jack Franchise Owner'. The 'Activity' pane is highlighted with a green arrow. The right-hand 'Page' properties pane is visible, showing fields for Label, Developer Name, Page Type, Object, Template, and Description.

The Page Tabs properties are displayed in the right-most column.

4. Select Add Tab.

A tab will appear, and will be set to a default standard tab.

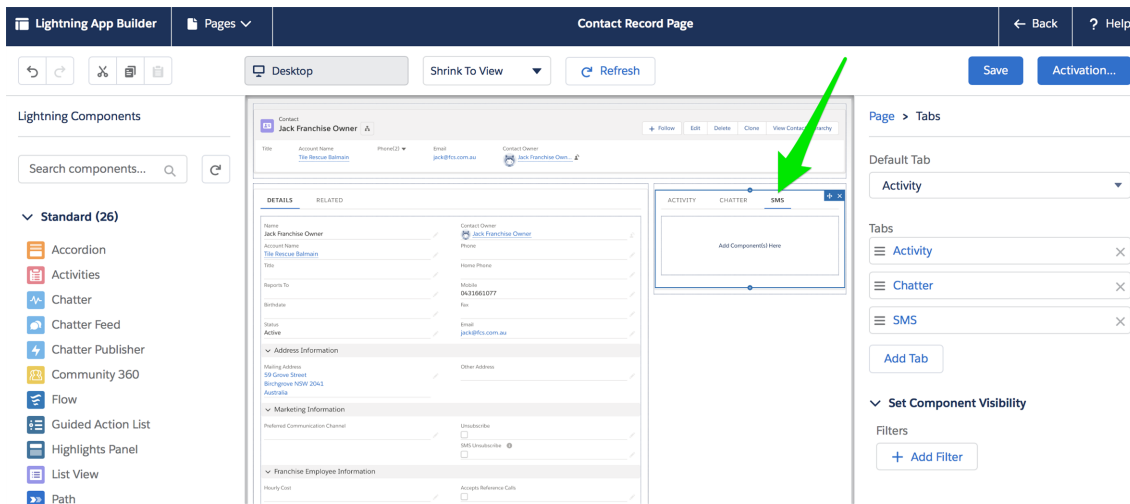
5. Click the tab, open the Tab Label menu, and select Custom.

The screenshot shows the Lightning App Builder interface for a 'Contact Record Page'. The 'Page > Tabs' dropdown menu is open, showing a list of tabs. The 'Custom' option is selected, and a green arrow points to the 'Custom' option in the dropdown menu. The 'Page' properties pane on the right shows the 'Default Tab' set to 'Activity'.

The Custom Tab Label field appears.

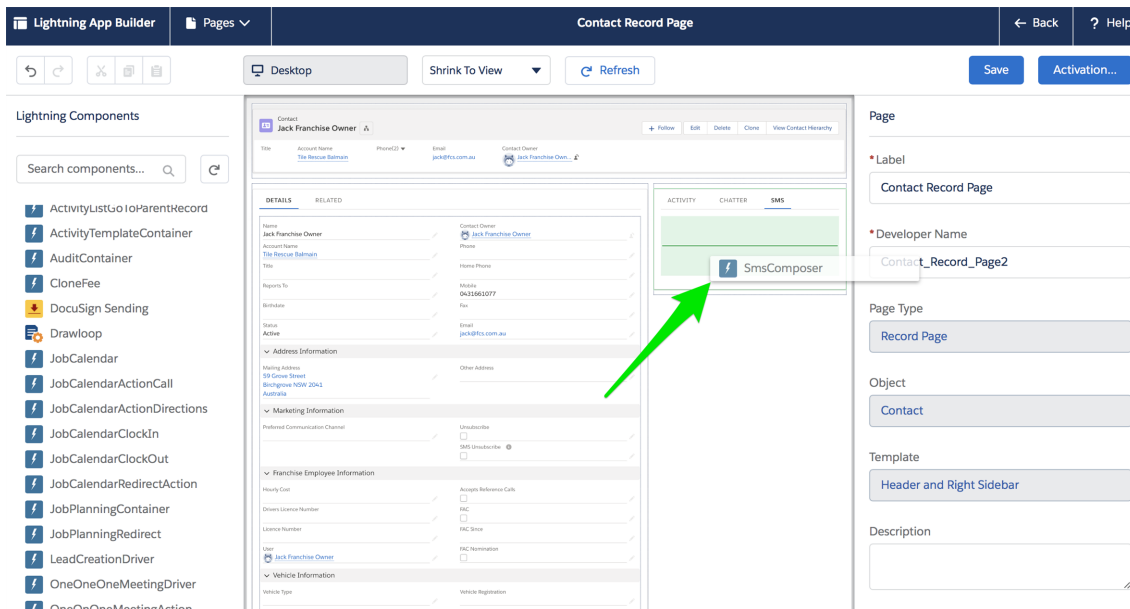
6. Enter SMS into the Custom Tab Label field.

7. Now select the new **SMS** label.



8. From the **Lightning Components** list, scroll down and locate the **SMSComposer** component.

9. Drag **SMSComposer** to the drop area named **Add Component(s) Here**.



SMSComposer is added. It immediately has a message of *Invalid Component*. You need to configure its properties.

10. In Configuration Id, enter the Configuration object's *record id* that you prepared earlier.

The screenshot shows the Lightning App Builder interface for a 'Contact Record Page'. On the right, the 'SmsComposer' component is being configured. The 'Configuration Id' field is highlighted with a green box and contains the value 'a057F0000020Z1mQAE'. Below it, the 'Number Field' is set to 'MobilePhone'. The 'Set Component Visibility' section shows a filter '+ Add Filter'.

11. In Number Field, enter the *Field API Name* that you prepared earlier.

This screenshot is similar to the previous one, but the 'Number Field' is now highlighted with a green box and contains the value 'MobilePhone'. The 'Configuration Id' remains 'a057F0000020Z1mQAE'.

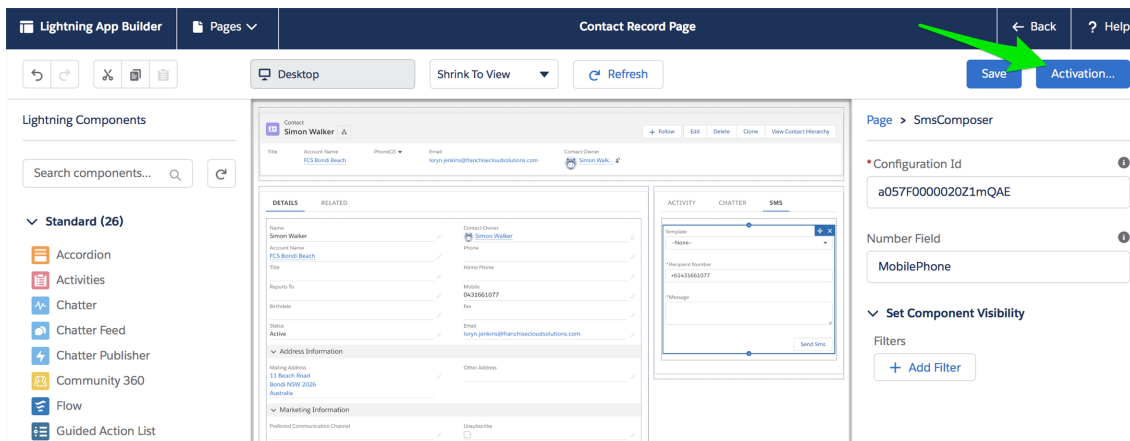
12. Press **Save**.

This screenshot shows the same configuration as the previous ones, but with a green arrow pointing to the 'Save' button in the top right corner of the interface.

We have configured the component. Now we need to restrict access to the component to ensure only head office users can access it.

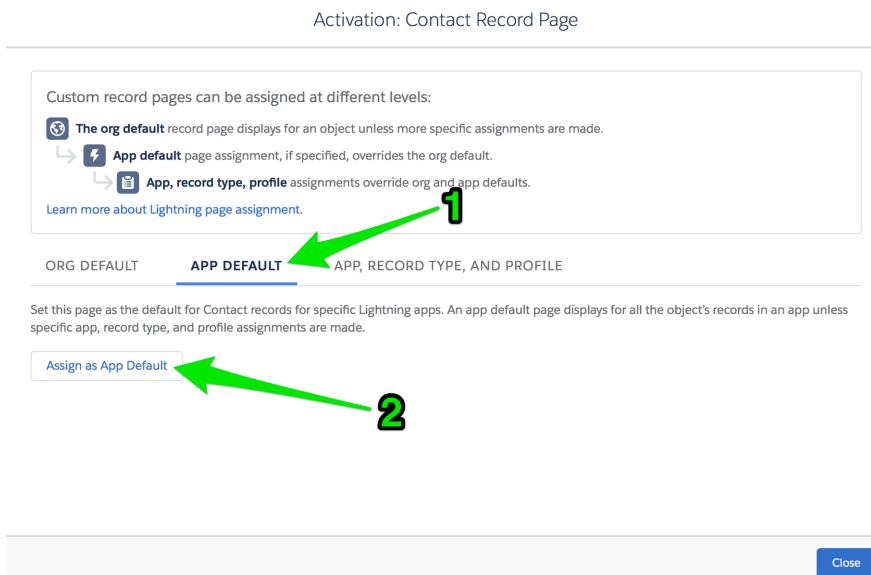
To restrict access to the SMSComposer component

1. Press Activation...



The Activation dialog box appears.

2. Choose App Default, and press Assign as App Default.



3. Now select all the Franchise Cloud Solutions applications other than **Business Management**.

Select Apps

Select the Lightning apps to display "Contact Record Page" as the app default page.

Lightning Apps (10)	
APP NAME	DESCRIPTION
☐ Business Management	App for Franchisees to management their business.
☒ Finance Management	
☒ Franchise Recruitment	Management of the Franchise Sales Process and related activities.
☒ Job Allocation Management	
☐ LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
☒ Operations Management	App for Franchisors to manage business operations.

Cancel Back Next

4. Review the assignments and press **Save**.

Review Assignments

Review the app default assignments to be saved for "Contact Record Page".

Review Assignments (5)		
APP NAME	CURRENT APP DEFAULT	NEW APP DEFAULT
Finance Management	System Default	Contact Record Page
Franchise Recruitment	Contact Record Page	Contact Record Page
Job Allocation Management	System Default	Contact Record Page
Operations Management	Contact Record Page	Contact Record Page
SMS Management	System Default	Contact Record Page

Cancel Back Save

5. Now press **Save**, then **Back**.

Lightning App Builder

Pages

Contact Record Page

Desktop Shrink To View Refresh

Lightning Components

Search components...

Standard (26)

- Accordion
- Activities
- Chatter
- Chatter Feed
- Chatter Publisher
- Community 360
- Flow
- Guided Action List

Contact Simon Walker

Details

Related

Activity Chatter SMS

Page > SmsComposer

Configuration Id

a057F0000020Z1mQAE

Number Field

MobilePhone

Set Component Visibility

Filters

+ Add Filter

You have now configured SMSComposer for use.



You may now wish to add some commonly used SMS templates for use with this record type. See “How to make an SMS template available in SMSComposer” on the next page.

How to make an SMS template available in SMSComposer

Some SMS Templates are intended for use within automated communications, while others are intended for interactive use within SMSComposer.

For general information on configuring SMS Templates, See “Configuring SMS Templates” on page 16.

To make an SMS Template available for a particular record type

1. From the **SMS Management** app, open the **SMS Templates** tab and select a particular SMS Template.
2. If this template is suitable for only one particular type of record, insert the name of the record into the `Applicable SObject` field.



To identify the name of a record type, See “How to identify a Field API Name” on page 54, and note the record’s API Name, as shown in the screen shot in step 2 of that procedure.

3. Make this template available from SMSComposer by checking the `Available in SMSComposer` check box.

The screenshot shows the 'SMS Management' app interface. The top navigation bar includes 'SMS Management', 'Configurations', 'Error Logs', 'Journeys', 'Journey Participants', 'Patterns', 'SMS Templates' (selected), 'Accounts', and 'More'. A search bar is present with the text 'Search SMS Templates and more...'. The main content area displays the details of an SMS Template named 'Contact - Parking Notification'. The template is categorized under 'Information' and 'System Information'. The 'Applicable SObject' field is set to 'Contact'. The 'Available in SMS Composer' checkbox is checked. The message content is 'Hi <!FirstName>, your car is parked in front of our office and it blocks the entry. Please move it. Thanks - Franchise Cloud Solutions'. The message length is 134. The template was created by 'Integration User' on 3/10/2017 at 12:52 PM and last modified by 'Integration User' on 3/10/2017 at 3:29 PM.

Information	
SMS Template Name	Contact - Parking Notification
Applicable SObject	Contact
Message	Hi <!FirstName>, your car is parked in front of our office and it blocks the entry. Please move it. Thanks - Franchise Cloud Solutions
Available in SMS Composer	☒
Message Length	134

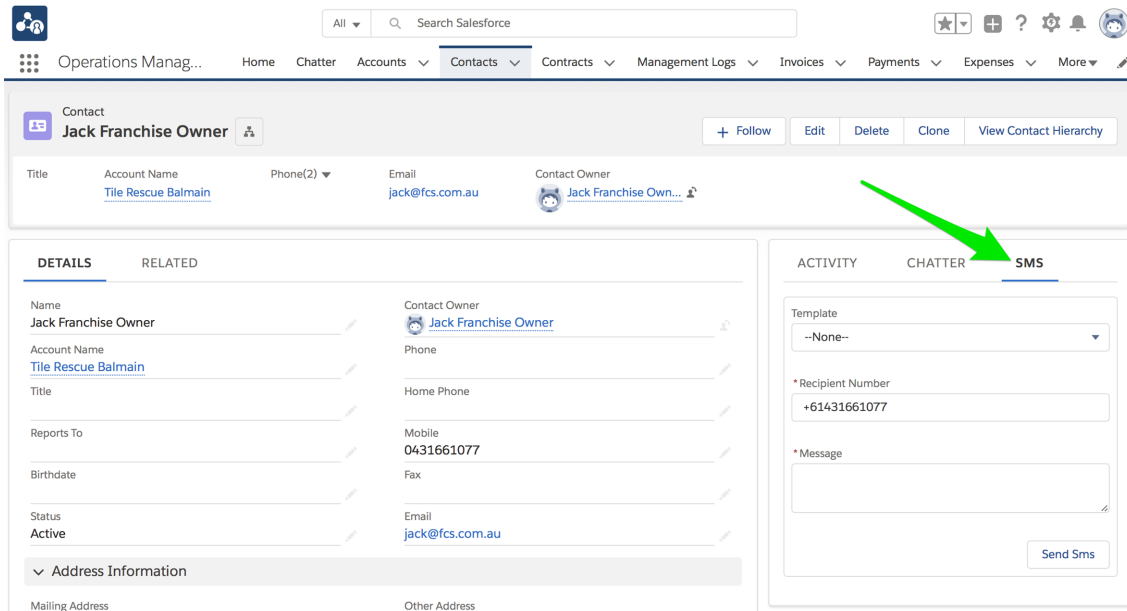
System Information	
Created By	Integration User, 3/10/2017 12:52 PM
Last Modified By	Integration User, 3/10/2017 3:29 PM

Using SMSComposer

SMSComposer can be used to rapidly send messages to franchisees on the road.

To send a message using SMSComposer

1. From any record type with an **SMS** tab configured in the **Activity** component, click the **SMS** tab.



The screenshot shows the Salesforce interface for a contact record named "Jack Franchise Owner". The "SMS" tab is selected, indicated by a green arrow. The interface includes a top navigation bar with various tabs like Home, Chatter, Accounts, Contacts, Contracts, Management Logs, Invoices, Payments, Expenses, and More. The contact details section shows fields for Name, Account Name, Title, Reports To, Birthdate, Status, and Address Information. The SMSComposer section on the right includes a Template dropdown, a Recipient Number field (containing "+61431661077"), a Message text area, and a Send Sms button.



Recipient Numbers must contain the international dialing Country Code prefix (e.g. +1 for USA; +44 for UK; +61 for Australia) and omit the trailing zero from any mobile number.

2. Select the Template.

The screenshot shows the Salesforce CRM interface for a contact named Jack Franchise Owner. The contact's details are visible, including their account name (Tile Rescue Balmain), email (jack@fcs.com.au), and mobile number (0431661077). The 'SMS' tab is selected, and a dropdown menu for message templates is open, showing options like '--None--', 'Contact - Parking Notification', 'Generic - Introduction', 'How Are You', and 'Please move your vehicle'. A green arrow points to the 'Please move your vehicle' template.

The mail merged message template appears.

3. Press **Send Sms**.



Because the system does not log a record of an SMS message being sent via SMS Composer, you may consider capturing the record of sending the message manually.

CHAPTER 4

Job Offer Notifications

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Understanding job offer conversations

SMS Management provides the ability to automatically distribute job offers to franchisees. SMS Management works hand-in-glove with Operations Management's rules-based Job Allocation system in order to conveniently distribute job offers to franchisees via mobile phone. When two-way messaging is implemented, it also provides the ability for franchisees to accept job offers via their mobile phone. This is particularly convenient for on-the-go franchisees and increases head office efficiency.

The software that implements job distribution by SMS is configured via a declarative conversation plan. This provides a highly flexible facility, allowing great flexibility. You will need to consult your site implementation notes in order to understand how your conversation plan has been implemented. The descriptions that follow describe a default Job Offer system as a way to familiarize you as to how conversation plans work.



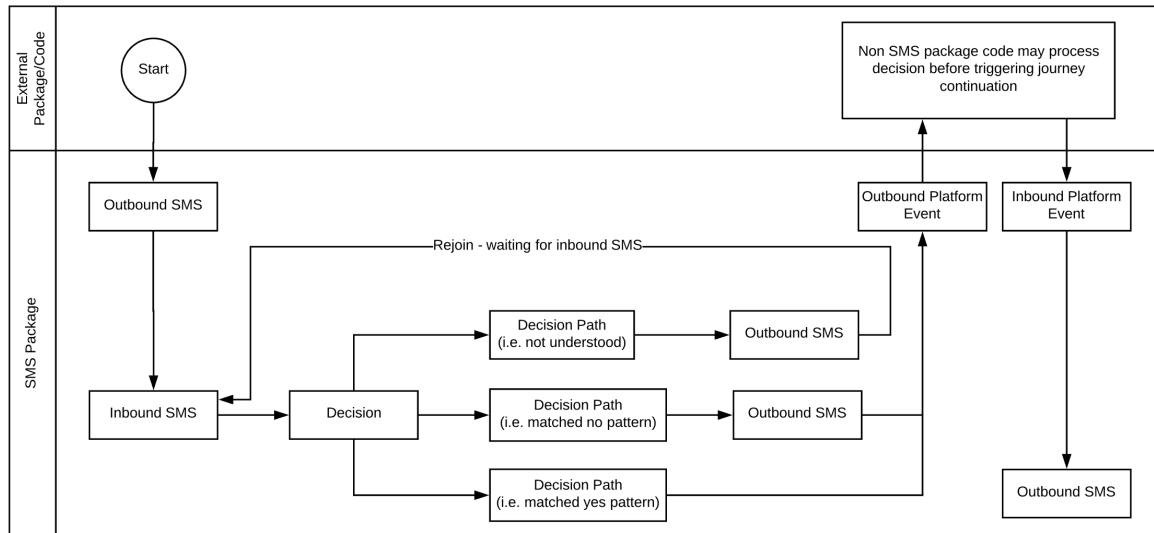
The engine underlying job offer conversations can be applied to broad array of interactions via SMS. If your organization has a need to introduce new SMS conversations, contact Franchise Cloud Solutions to understand how we can help you achieve your aim.

Example conversation plan

The default Job Offer conversation plan contains a series of basic steps

1. Sending the Job Offer via an SMS gateway
2. Receiving the Response from the SMS gateway
3. Processing the message response, which consists of matching predefined patterns against one of several branches. The branches consist of
 - a. Recognizing the Yes response
 - b. Recognizing the No response
 - c. Identifying a response as Unknown
4. When the 'Yes' branch is recognized, requesting the application attempt to allocate the job to the current franchisee.
5. Receiving the application response.
6. Sending an SMS to the franchisee to confirm that the job is assigned.

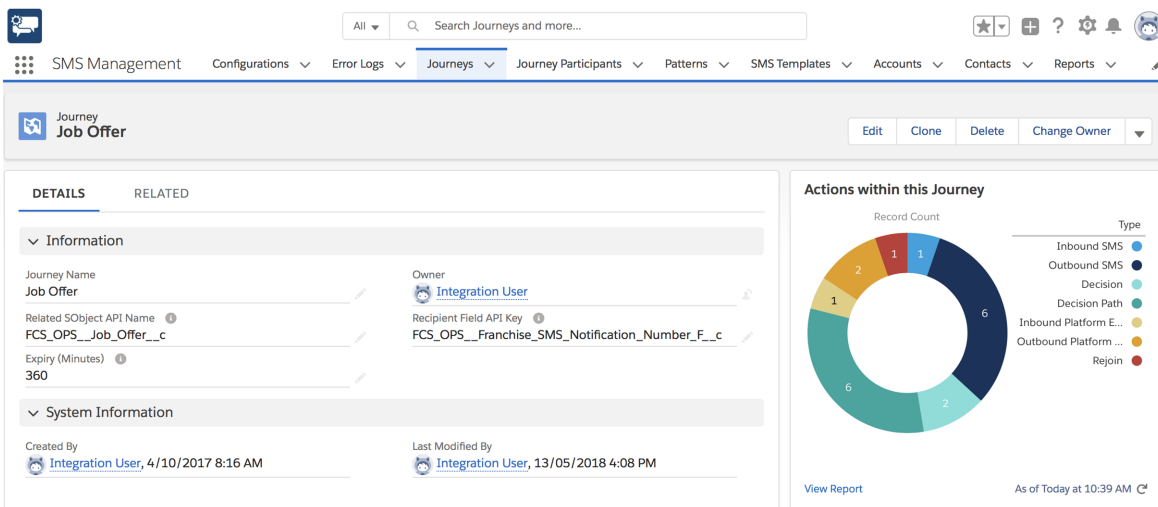
These steps are illustrated in the diagram below. The diagram also shows additional logic for the 'No' and 'Not understood' branches.



What follows shows how this conversation plan is configured in the **SMS Management** application.

Journey

What we have been calling a ‘conversation plan’ is configured within the SMS Management package as a **Journey**. The **Journey** record contains top-level header information, and its **Related** tab contains the list of **Journey Actions** that define the behavior of the **Journey**.



The **Related SObject API Name** specifies which object will provide basic contextual information for the message journey (i.e. the conversation). On journey initiation, the **SObject** is captured in serialized form. The captured **SObject** provides the context for the message journey. Any of the fields captured within the **SObject** can be used within any **SMS Template** configured within the message journey.

The **Recipient Field API Key** specifies which field within the **SObject** contains the recipient’s mobile phone number.

Journey Actions

The **Journey's Related** tab contains the list of **Journey Actions** that comprise the message journey, and shows the sequence in which each Journey Action is processed.

The screenshot shows the 'Journey Job Offer' interface. The 'RELATED' tab is active, displaying a list of Journey Actions (6+). The list includes actions like 'Send Job Offer SMS', 'Received Job Offer Res...', 'Decision Job Offer Resp...', 'Yes Decision', 'No Decision', and 'Unknown Decision'. To the right, a donut chart titled 'Actions within this Journey' shows the distribution of action types. The chart is divided into segments representing different types: Inbound SMS (blue), Outbound SMS (dark blue), Decision (light blue), Decision Path (teal), Inbound Platform E... (yellow), Outbound Platform... (orange), and Rejoin (red). The chart also shows the record count for each type.

JOURNEY ACTION NAME	TYPE	SEQUENCE	PREVIOUS ACTION
Send Job Offer SMS	Outbound SMS	1	
Received Job Offer Res...	Inbound SMS	2	Send Job Offer SMS
Decision Job Offer Resp...	Decision	3	Received Job Offer Respo...
Yes Decision	Decision Path	4	Decision Job Offer Respon...
No Decision	Decision Path	4	Decision Job Offer Respon...
Unknown Decision	Decision Path	4	Decision Job Offer Respon...

[View All](#)

Actions within this Journey

Record Count

Type

- Inbound SMS
- Outbound SMS
- Decision
- Decision Path
- Inbound Platform E...
- Outbound Platform...
- Rejoin

[View Report](#) As of Today at 12:12 PM

The above list shows only the first few Journey Actions. Click **View All** to see the full list of Journey Actions.

The screenshot shows the 'Journey Actions' interface. The 'Journey Actions' tab is active, displaying a list of 19 items. The list includes actions like 'Send Job Offer SMS', 'Received Job Offer Response', 'Decision Job Offer Response', 'Yes Decision', 'No Decision', 'Unknown Decision', 'Response Not Understood', 'Yes Decision Platform Event Outbound', 'No Decision Platform Event Outbound', 'Rejoin at Inbound SMS', 'Job Offer Declined SMS', 'Yes Decision Platform Event Inbound', 'Decision Job Offer Response Yes Event', 'Job Offer Acceptance Valid Decision', 'Job Offer Acceptance Invalid', 'Job Offer Acceptance Error Yes Event', 'Job Offer Accepted and Valid SMS', 'Job Offer Accepted and Invalid SMS', and 'Job Offer Accepted and Error SMS'. The list is sorted by Sequence and updated 4 minutes ago.

JOURNEY ACTION NAME	TYPE	SEQUENCE	PREVIOUS ACTION
Send Job Offer SMS	Outbound SMS	1	
Received Job Offer Response	Inbound SMS	2	Send Job Offer SMS
Decision Job Offer Response	Decision	3	Received Job Offer Response
Yes Decision	Decision Path	4	Decision Job Offer Response
No Decision	Decision Path	4	Decision Job Offer Response
Unknown Decision	Decision Path	4	Decision Job Offer Response
Response Not Understood	Outbound SMS	5	Unknown Decision
Yes Decision Platform Event Outbound	Outbound Platform Event	5	Yes Decision
No Decision Platform Event Outbound	Outbound Platform Event	5	No Decision
Rejoin at Inbound SMS	Rejoin	6	Response Not Understood
Job Offer Declined SMS	Outbound SMS	6	No Decision Platform Event Outbound
Yes Decision Platform Event Inbound	Inbound Platform Event	6	Yes Decision Platform Event Outbound
Decision Job Offer Response Yes Event	Decision	7	Yes Decision Platform Event Inbound
Job Offer Acceptance Valid Decision	Decision Path	8	Decision Job Offer Response Yes Event
Job Offer Acceptance Invalid	Decision Path	8	Decision Job Offer Response Yes Event
Job Offer Acceptance Error Yes Event	Decision Path	8	Decision Job Offer Response Yes Event
Job Offer Accepted and Valid SMS	Outbound SMS	9	Job Offer Acceptance Valid Decision
Job Offer Accepted and Invalid SMS	Outbound SMS	9	Job Offer Acceptance Invalid
Job Offer Accepted and Error SMS	Outbound SMS	9	Job Offer Acceptance Error Yes Event



Each Journey Action is a particular type. For an overview of the Journey Action types, See “Types of Journey Actions” on page 44.

How these Journey Actions function can most clearly be seen using a specific example. See “Example conversation” on the facing page.

Patterns and Keywords

There is Decision within the Journey Actions. The Decision is chosen based on pattern-matching the recipient's response to one of the Decision branches. Each branch is selected through matching the message content with a **Pattern**.

There are three patterns used within this message journey. Patterns are specified by listing a series of **Keywords** that belong within the **Pattern**. Here, for example, are the **Keywords** associated with the *Yes* **Pattern**.

The screenshot shows the Salesforce SMS Management interface. The top navigation bar includes 'SMS Management', 'Configurations', 'Error Logs', 'Journeys', 'Journey Participants', 'Patterns', 'SMS Templates', 'Accounts', 'Contacts', and 'Reports'. The 'Patterns' tab is selected. Below the navigation bar, the 'Pattern Yes' configuration is displayed. It includes buttons for 'Edit', 'Clone', 'Delete', 'Change Owner', and 'Add Keyword'. The 'RELATED' tab is active, showing a list of 6 keywords: 'Y', 'Yes', 'Yo', 'Yep', 'Yeah', and 'Yay'. Each keyword has a dropdown arrow next to it.

Here is the corresponding *No* **Pattern**.

The screenshot shows the Salesforce SMS Management interface. The top navigation bar includes 'SMS Management', 'Configurations', 'Error Logs', 'Journeys', 'Journey Participants', 'Patterns', 'SMS Templates', 'Accounts', 'Contacts', and 'Reports'. The 'Patterns' tab is selected. Below the navigation bar, the 'Pattern No' configuration is displayed. It includes buttons for 'Edit', 'Clone', 'Delete', 'Change Owner', and 'Add Keyword'. The 'RELATED' tab is active, showing a list of 6+ keywords: 'No', 'Nope', 'Never', 'N', 'Nah', and 'Ney'. Each keyword has a dropdown arrow next to it.

The *Unknown* **Pattern** is created by associating no **Keywords** with the **Pattern**, then declaring it to be the *Default Action* (see the **Journey Action's Details** tab).

Example conversation

The following description steps you through an instance of a Job Offer conversation. It illustrates how the **Journey** and **Journey Action** objects are executed in order to create the message journey.

Journey Participant

When the message journey begins, Operations Management calls a generic communication function to which SMS Management subscribes. SMS Management then follows the **Journey** object to create a **Journey Participant** record. The Journey Participant captures the initial object specified in the **Journey** object's **Related SObject API Name** field. This object is serialized and recorded in the **Journey Participant** object's **Data** field.

The screenshot shows the Salesforce interface for a Journey Participant record. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu is open, showing options like SMS Management, Configurations, Error Logs, Journeys, Journey Participants (selected), Patterns, SMS Templates, Accounts, Contacts, and Reports. The record header for JP-000332 includes buttons for Edit, Clone, Delete, and Change Owner. The record is divided into two main sections: Information and Journey Parameters. The Information section contains fields for Journey Participant Name (JP-000332), Status (Completed), Expiry Datetime (5/06/2018 7:03 PM), Journey (Job Offer), and Recipient Number (+61431661077). The Journey Parameters section contains fields for Configuration (CN-00001) and Data. The Data field contains a large JSON object representing the serialized SObject. The bottom of the record shows the What Id (a057F000002UVNcUAO) and Who Id.

Information

Journey Participant Name
JP-000332

Status
Completed

Expiry Datetime
5/06/2018 7:03 PM

Journey
[Job Offer](#)

Recipient Number
+61431661077

Journey Parameters

Configuration
[CN-00001](#)

Data

```
{
  "attributes": {
    "type": "FCS_OPS__Job_Offer__c",
    "url": "/services/data/v42.0/subjects/FCS_OPS__Job_Offer__c/a057F000002UVNcUAO"
  },
  "Id": "a057F000002UVNcUAO",
  "OwnerId": "0057F000000KPUnQAO",
  "IsDeleted": false,
  "Name": "JON-00196",
  "CurrencyIsoCode": "AUD",
  "CreatedDate": "2018-06-05T02:48:17.000+0000",
  "CreatedById": "0057F000000KPUnQAO",
  "LastModifiedDate": "2018-06-05T02:48:18.000+0000",
  "LastModifiedById": "0057F000000KPUnQAO",
  "SystemModstamp": "2018-06-05T02:48:28.000+0000",
  "LastActivityDate": "2018-06-05",
  "FCS_OPS__Franchise__c": "0017F00000EybZ5QAJ",
  "FCS_OPS__Franchise_Name_F__c": "Tile Rescue Balmain",
  "FCS_OPS__Hours_Since_Creation_F__c": 0,
  "FCS_OPS__Job_Offers_F__c": 1,
  "FCS_OPS__Job_Time_Out__c": "2018-06-05T04:48:16.000+0000",
  "FCS_OPS__Job__c": "a0Y7F000001PznnUAC",
  "FCS_OPS__Minutes_Since_Creation_F__c": "15",
  "FCS_OPS__Offer_Time_Out__c": "2018-06-05T03:08:16.000+0000",
  "FCS_OPS__SMS_Requested__c": true,
  "FCS_OPS__Status__c": "Accepted",
  "FCS_OPS__isOffSystem_F__c": false,
  "FCS_OPS__Franchise_SMS_Notification_Number_F__c": "61431661077",
  "FCS_OPS__Message_Identifier__c": "424",
  "FCS_OPS__Offer_To_Owner__c": true,
  "Contact_Name__c": "John Cahill",
  "Street__c": "9 Campbell St",
  "Suburb__c": "Balmain",
  "Postcode__c": "2041",
  "Details__c": "Regrouit; Kitchen regrouit",
  "FCS_OPS__Response_Channel__c": "SMS",
  "FCS_OPS__Reply_Processed__c": "2018-06-05T03:03:14.957+0000"
}
```

What Id
a057F000002UVNcUAO

Who Id

Any field value captured within the serialized SObject may be used within any **SMS Template** attached to a **Journey Action**. The values of these fields will be transferred into any mail-merged SMS Template within the journey.

Outbound SMS

The first **Journey Action** is an *Outbound SMS* action. This action mail-merges fields from the serialized SObject into the SMS Template, then sends that message to the Recipient's mobile number defined in the Journey object's **Recipient Field API Key**. The

value of `Recipient Field API Key` must match one of the `SObject` field names within the **Journey Participant's Data** field.

The screenshot shows the 'Journey Action Send Job Offer SMS' configuration page in Salesforce. The page has a top navigation bar with 'SMS Management' selected. The main content area is divided into 'DETAILS' and 'RELATED' tabs. Under 'DETAILS', there are three sections: 'Information' (Journey Action Name: Send Job Offer SMS, Journey: Job Offer, Previous Action: , Record Type: Outbound SMS), 'Outbound SMS' (SMS Template: Job Offer SMS, Create Activity: checked), and 'System Information' (Created By: Integration User, 4/10/2017 8:16 AM, Last Modified By: Integration User, 4/10/2017 8:16 AM). On the right, there is a 'Participant Actions that use this Journey Action' section with a donut chart showing a record count of 73 and a status of 'Completed'.

This results in the following **Journey Participant Action** being generated. The Outbound **Journey Participant Action** record captures the output of the SMS Template merged with details from the **Journey Participant** object's `Data` field, and also records the results of the message send at the SMS Gateway.

The screenshot shows the 'Journey Participant Action PA-003416' details page in Salesforce. The page has a top navigation bar with 'SMS Management' selected. The main content area is divided into 'DETAILS' and 'RELATED' tabs. Under 'DETAILS', there are two sections: 'Information' (Participant Actions Name: PA-003416, Record Type: Outbound SMS, Journey Participant: JP-000332, Journey Action: Send Job Offer SMS, Status: Completed) and 'Outbound SMS' (Actual Recipient Number: +61431661077, SMS SID: SM1daf189ab6e84477b95daf01e9b906ee, SMS Template: Job Offer SMS, SMS Gateway Timestamp: 5/06/2018 12:48 PM, Message: You have a new Offer JON-00196. Regrout; Kitchen regrout John Cahill 9 Campbell St, Balmain Reply Y424/N424, SMS Gateway: Twilio, Additional Information: , Created By: Automated Process, 5/06/2018 12:48 PM, Last Modified By: Automated Process, 5/06/2018 12:48 PM).

The **Journey Action** defines the **Next Step** (on the **Journey Action Related** tab) as being *Received Job Offer Response*, which is a type of Inbound SMS **Journey Participant Action**.

Inbound SMS

The Inbound SMS **Journey Participant Action** is created immediately after the preceding step. It is created with a near-empty payload, as shown below.

The screenshot shows the Salesforce SMS Management interface. At the top, there's a navigation bar with 'SMS Management' selected. Below it, a header for 'Journey Participant Action PA-003417' includes a 'Delete' button. The main content area is divided into 'DETAILS' and 'RELATED' tabs. Under 'DETAILS', the following information is displayed:

Participant Actions Name PA-003417	Record Type Inbound SMS
Journey Participant JP-000332	Status Queued
Journey Action Received Job Offer Response	

Below this, an 'Inbound SMS' section is expanded, showing:

Actual Recipient Number 424	Identifier Value 424
Message	SMS SID 424
SMS Gateway Twilio	SMS Gateway Timestamp 5/06/2018 12:48 PM
	Additional Information

At the bottom, it shows 'Created By: Automated Process, 5/06/2018 12:48 PM' and 'Last Modified By: Loryn Jenkins, 8/08/2018 5:02 PM'.

The **Journey Participant Action** then waits for a response. When it receives a response containing a code matching the `Identifier Value`, the message is parsed into the *Received Job Offer Response* **Journey Participant Action**.

This screenshot shows the same Salesforce SMS Management interface, but the status of the Journey Participant Action (PA-003417) has changed to 'Completed'. The details are as follows:

Participant Actions Name PA-003417	Record Type Inbound SMS
Journey Participant JP-000332	Status Completed
Journey Action Received Job Offer Response	

The 'Inbound SMS' section is also expanded, showing updated information:

Actual Recipient Number +61 431 661 077	Identifier Value 424
Message Y424	SMS SID SM22061f2fc5937a951c7870865db2cfd9
SMS Gateway Twilio	SMS Gateway Timestamp 5/06/2018 1:03 PM
	Additional Information

The 'Last Modified By' is now 'Loryn Jenkins, 8/08/2018 3:38 PM'.

The current **Journey Action** now defines the Next Step as being *Decision Job Offer Response*, which is a **Journey Action** type of *Decision*.

Decision

A *Decision Journey Action* has a *Default Action*, which is executed if the message response is matched to no other branch.

Journey Action
Decision Job Offer Response

[Edit](#) [Clone](#) [Delete](#)

DETAILS **RELATED**

Information

Journey Action Name
Decision Job Offer Response

Journey
Job Offer

Previous Action
[Received Job Offer Response](#)

Record Type
Decision

Type
Decision

Decision

Default Action
[Unknown Decision](#)

Pattern

System Information

Created By
[Integration User](#), 4/10/2017 8:16 AM

Last Modified By
[Integration User](#), 4/10/2017 8:16 AM

Participant Actions that use this Journey Action

We can't draw this chart because there is no data.

[View Report](#) As of Today at 5:05 PM

On the **Decision Journey Action's Related** tab, the **Next Actions** present three Journey Actions at the same **Sequence** level. This represents three potential branches to be executed. A branch will be executed if it matches the **Pattern** within the branch. If no branch has a matching pattern, the **Default Action** is executed.

Journey Action
Decision Job Offer Response

[Edit](#) [Clone](#) [Delete](#)

DETAILS **RELATED**

Journey Participant Actions (0) [New](#)

Next Actions (3) [New](#)

JOURNEY ACTION NAME

[Yes Decision](#) ▼

[No Decision](#) ▼

[Unknown Decision](#) ▼

Participant Actions that use this Journey Action

We can't draw this chart because there is no data.

In this instance, the **Pattern** that has matched the response is the **Yes Pattern**.

Journey Participant Action PA-003418 Delete

DETAILS **RELATED**

Participant Actions Name: PA-003418

Journey Participant: JP-000332

Journey Action: Yes Decision

Record Type: Decision

Status: Completed

Type: Decision

Matched Keyword: Y

Created By: SMS Management Site Guest User, 5/06/2018 1:03 PM

Last Modified By: SMS Management Site Guest User, 5/06/2018 1:03 PM

Decision

Matched Keyword: Y

The *Yes* branch's Next Action is now executed.

Outbound Platform Event

Given that the franchisee has indicated acceptance of the Job Offer, the next action attempts to cause Operations Management to mark the Job Offer as having been accepted. It does this by sending a message to Operations Management (i.e. the "Platform"). An **Outbound Platform Event** is the **Journey Action** that causes communication with the platform.

Journey Action Yes Decision Platform Event Outbound Edit Clone Delete

DETAILS **RELATED**

Information

Journey Action Name: Yes Decision Platform Event Outbound

Journey: Job Offer

Previous Action: Yes Decision

Record Type: Platform Event

Type: Outbound Platform Event

Platform Event

Platform Event Action Name: Job Offer Response

System Information

Created By: Integration User, 4/10/2017 8:16 AM

Last Modified By: Integration User, 4/10/2017 8:16 AM

Participant Actions that use this Journey Action

Record Count: 19

Status: Completed

[View Report](#) As of Today at 5:07 PM

Communication with the application causes the *Yes Decision Platform Event Outbound* to be created.

The screenshot shows the Salesforce SMS Management interface. The top navigation bar includes 'SMS Management', 'Configurations', 'Error Logs', 'Journeys', 'Journey Participants', 'Patterns', 'SMS Templates', 'Accounts', 'Contacts', and 'Reports'. A search bar is present with the text 'Search Salesforce'. The main content area displays details for a 'Journey Participant Action' with ID 'PA-003419'. The 'DETAILS' tab is active, showing fields for 'Participant Actions Name' (PA-003419), 'Record Type' (Platform Event), 'Journey Participant' (JP-000332), 'Status' (Completed), 'Journey Action' (Yes Decision Platform Event Outbound), and 'Type' (Outbound Platform Event). A 'Platform Event' section is expanded, showing 'Platform Event Action Name' (Job Offer Response) and 'Message'. The 'Created By' and 'Last Modified By' fields both show 'SMS Management Site Guest User' with a timestamp of '5/06/2018 1:03 PM'. A 'Delete' button is located in the top right corner.

Its **Next Action** is the *Yes Decision Platform Event Inbound*, which is a type of Inbound Platform Event.

Inbound Platform Event

The **Inbound Platform Event** is a **Journey Participant Action** which listens for a response from the application platform.

The screenshot shows the Salesforce SMS Management interface. The top navigation bar includes 'SMS Management', 'Configurations', 'Error Logs', 'Journeys', 'Journey Participants', 'Patterns', 'SMS Templates', 'Accounts', 'Contacts', and 'Reports'. A search bar is present with the text 'Search Salesforce'. The main content area displays details for a 'Journey Participant Action' with ID 'PA-003420'. The 'DETAILS' tab is active, showing fields for 'Participant Actions Name' (PA-003420), 'Record Type' (Platform Event), 'Journey Participant' (JP-000332), 'Status' (Completed), 'Journey Action' (Yes Decision Platform Event Inbound), and 'Type' (Inbound Platform Event). A 'Platform Event' section is expanded, showing 'Platform Event Action Name' (empty) and 'Message' (Valid). The 'Created By' field shows 'SMS Management Site Guest User' with a timestamp of '5/06/2018 1:03 PM'. The 'Last Modified By' field shows 'Automated Process' with a timestamp of '5/06/2018 1:03 PM'. A 'Delete' button is located in the top right corner.

The template **Journey Action** contains a **Decision Action** which holds multiple branches. Each branch corresponds with a particular response from the application platform. The responses consist of

- » Valid
- » Invalid
- » Error

Decision Complete

In this instance, the Valid branch is matched. The *Job Offer Acceptance Valid Decision* Journey Participant Action is recorded to indicate that this branch was selected.

The screenshot shows the Salesforce Journey Builder interface. The top navigation bar includes 'SMS Management', 'Configurations', 'Error Logs', 'Journeys', 'Journey Participants', 'Patterns', 'SMS Templates', 'Accounts', 'Contacts', and 'Reports'. The main header displays 'Journey Participant Action PA-003421' with a 'Delete' button. The 'DETAILS' tab is active, showing the following information:

Field	Value
Participant Actions Name	PA-003421
Journey Participant	JP-000332
Journey Action	Job Offer Acceptance Valid Decision
Record Type	Decision
Status	Completed
Type	Decision
Matched Keyword	Valid
Created By	Automated Process, 5/06/2018 1:03 PM
Last Modified By	Automated Process, 5/06/2018 1:03 PM

The Next Action is an Outbound SMS Journey Action.

Outbound SMS Message

The final Outbound SMS Journey Participant Action records the confirmation message sent to the Recipient's mobile number. The purpose of the message is to confirm that the Job Offer Number was accepted by the Operations Management.

The screenshot shows the Salesforce Journey Builder interface for a different Journey Participant Action. The top navigation bar is the same. The main header displays 'Journey Participant Action PA-003422' with a 'Delete' button. The 'DETAILS' tab is active, showing the following information:

Field	Value
Participant Actions Name	PA-003422
Journey Participant	JP-000332
Journey Action	Job Offer Accepted and Valid SMS
Record Type	Outbound SMS
Status	Completed
Actual Recipient Number	+61431661077
SMS Template	Job Offer Accepted and Valid SMS
Message	Hi Tile Rescue Balmain. Offer JON-00196 has been updated to Accepted
SMS Gateway	Twilio
SMS SID	SM7f450d27f35f44e28d3223896bfb8d9d
SMS Gateway Timestamp	5/06/2018 1:03 PM
Additional Information	
Created By	Automated Process, 5/06/2018 1:03 PM
Last Modified By	Automated Process, 5/06/2018 1:03 PM

This concludes our trace through this sample message journey.



You can trace through each message journey to understand how the conversation plan, which is declared by the **Journey**, **Journey Action**, **Pattern** and **Keyword** objects, has been executed by examining the **Journey Participant** and its related **Journey Participant Action** objects.

Types of Journey Actions

A journey and its actions represent the blueprint for a conversation with a person via SMS. The types of actions that can be applied are described below.

Outbound SMS

A journey action type that sends an outbound message using the chosen gateway.

Inbound SMS

A journey action type that listens for an inbound message using the chosen gateway.

Decision

A journey action type that initiates analysis of an incoming message or platform event to begin pattern detection.

Decision Path

A potential path containing a pattern to which the supplied keyword will be compared.

Outbound Platform Event

A journey action type that sends a message to the platform.

Inbound Platform Event

A journey action type that receives a response from the platform to the preceding Outbound Platform Event message.

Rejoin

A journey action type that allows the conversation to rejoin the Journey at an earlier step, typically looping back to an Inbound SMS action type.

Configuring manual fallback

When responses to a message fail to match any of the patterns, the SMS response can either be assigned to an owner (Escalation Owner) or to queue (Escalation Queue).



When SMS Management has been configured, you must enter either an Escalation Owner or an Escalation Queue in the **Configuration** object. To understand how to resume non-matched messages, See “Resuming from manual fallback” on the next page.

To configure an Escalation Owner

1. In the **Configuration** object, enter the name of the person who will handle non-matched messages.

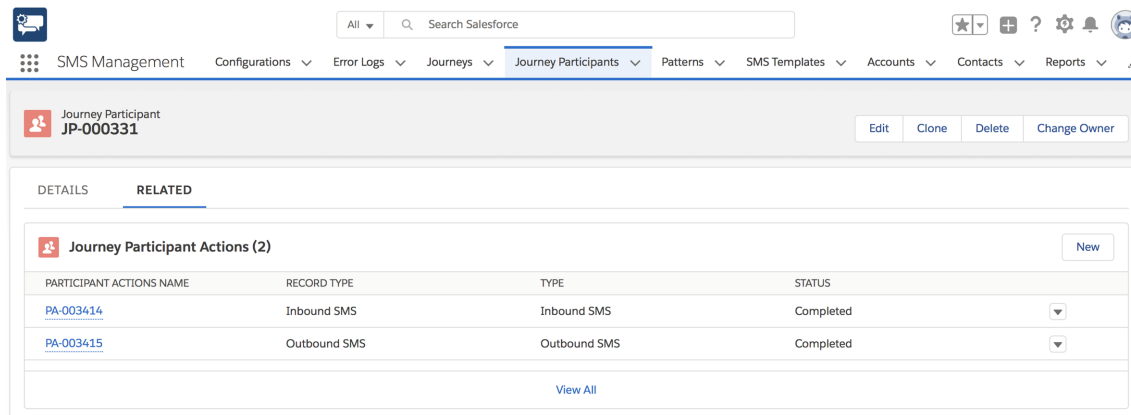
To configure an Escalation Queue

1. Create a Salesforce Queue based on the *Journey Participant* type, or assign the *Journey Participant* type to an existing queue. See “How to create a Salesforce queue” on page 50.
2. In the **Configuration** object, enter the queue `Label` into the `Escalation Queue Name` field.

Resuming from manual fallback

On occasions when an SMS conversation is referred to the `Escalation Owner` or placed on an `Escalation Queue`, it is necessary to complete the `Job Allocation` process through manual processing. How you handle the manual processing will depend in part on whether or not the escalated **Journey Participant** contains the initial Outbound SMS message.

- » Here is an example of where the Journey Participant contains the initial Outbound SMS message.



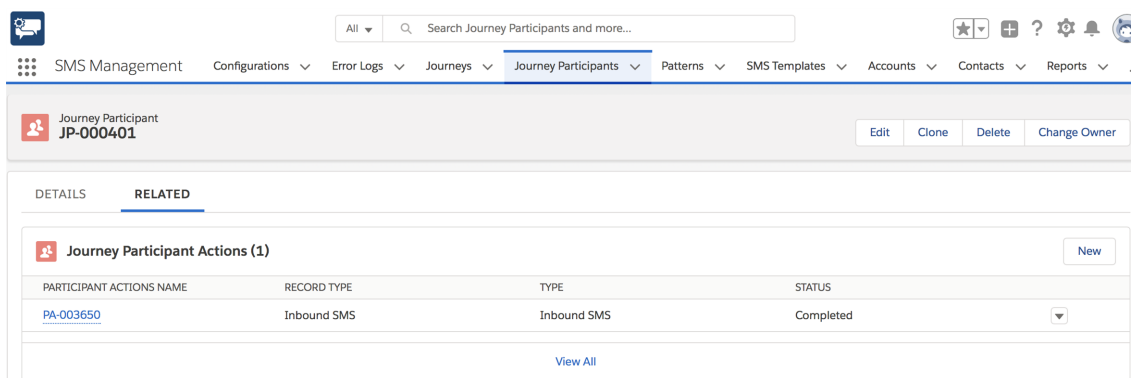
The screenshot shows the Salesforce interface for a Journey Participant. The top navigation bar includes 'SMS Management', 'Configurations', 'Error Logs', 'Journeys', 'Journey Participants', 'Patterns', 'SMS Templates', 'Accounts', 'Contacts', and 'Reports'. The main header displays 'Journey Participant JP-000331' with buttons for 'Edit', 'Clone', 'Delete', and 'Change Owner'. Below this, the 'RELATED' tab is active, showing 'Journey Participant Actions (2)'. The table lists two actions:

PARTICIPANT ACTIONS NAME	RECORD TYPE	TYPE	STATUS
PA-003414	Inbound SMS	Inbound SMS	Completed
PA-003415	Outbound SMS	Outbound SMS	Completed

A 'View All' link is at the bottom of the table.

You can use the initial Outbound SMS message to determine the relevant `Job Offer Number`.

- » Here is an example of where the Journey Participant does not contain the initial Outbound SMS message.



The screenshot shows the Salesforce interface for a Journey Participant. The top navigation bar is the same as the previous screenshot. The main header displays 'Journey Participant JP-000401' with buttons for 'Edit', 'Clone', 'Delete', and 'Change Owner'. Below this, the 'RELATED' tab is active, showing 'Journey Participant Actions (1)'. The table lists one action:

PARTICIPANT ACTIONS NAME	RECORD TYPE	TYPE	STATUS
PA-003650	Inbound SMS	Inbound SMS	Completed

A 'View All' link is at the bottom of the table.

In this instance, there is no link to the initial Outbound SMS message. It is likely you will not be able to determine the `Job Offer Number` from this Journey Participant Action.

To manually process Job Allocation when the Journey Participant contains the initial Outbound SMS message

1. From the escalated **Journey Participant**, open the outbound **Journey Participant Action** and identify the `Job Offer Number`.
2. Go to **Job Allocation Management**, open the corresponding **Job Offer**, press **Accept**, **Decline** or otherwise process the **Job Offer** as needed.

To manually process Job Allocation when the Journey Participant is not connected to the initial Outbound SMS message

1. From the escalated **Journey Participant**, identify the `Recipient Number` and contact them.
2. Ask the Recipient which **Job Offer Number** they were responding to.
3. When appropriate, manually process the Job Offer. Do this by going to **Job Allocation Management**, open the corresponding **Job Offer**, and **Accept** or **Decline** or otherwise process the **Job Offer** as needed.

CHAPTER 5

Other Administration Tasks

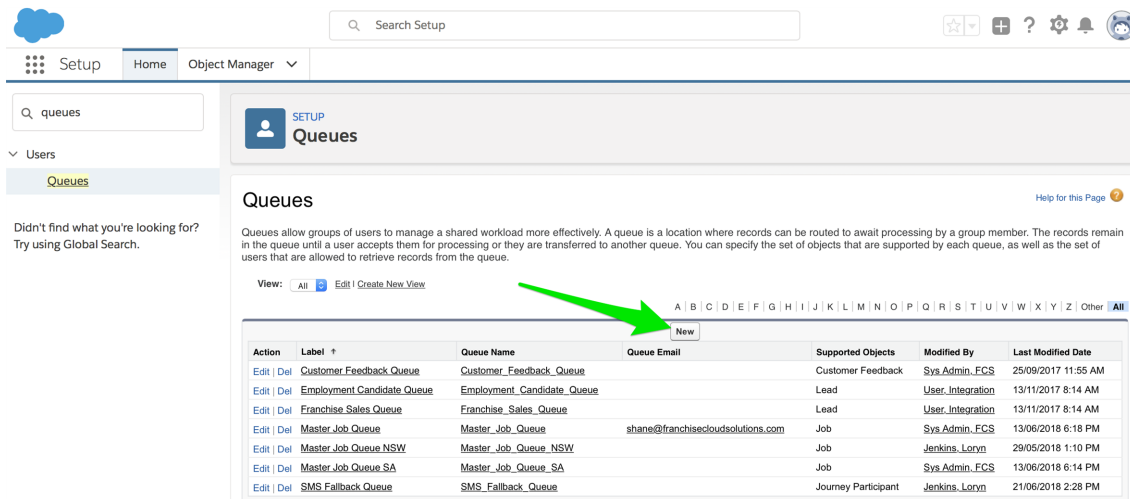
How to create a Salesforce queue	50
How to identify record ids	52
How to import, export and update data in Salesforce	53
How to identify a Field API Name	54

How to create a Salesforce queue

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

To create a queue

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



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'queues' and a list with 'Users' and 'Queues' (selected). The main content area is titled 'Queues' and includes a description: 'Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they are transferred to another queue. You can specify the set of objects that are supported by each queue, as well as the set of users that are allowed to retrieve records from the queue.'

Below the description is a table of existing queues. A green arrow points to the 'New' button in the top right corner of the table.

Action	Label ↑	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
Edit Del	Customer Feedback Queue	Customer_Feedback_Queue		Customer Feedback	Sys Admin_FCS	25/09/2017 11:55 AM
Edit Del	Employment Candidate Queue	Employment_Candidate_Queue		Lead	User_Integration	13/11/2017 8:14 AM
Edit Del	Franchise Sales Queue	Franchise_Sales_Queue		Lead	User_Integration	13/11/2017 8:14 AM
Edit Del	Master Job Queue	Master_Job_Queue	shane@franchisedcloudsolutions.com	Job	Sys Admin_FCS	13/06/2018 6:18 PM
Edit Del	Master Job Queue NSW	Master_Job_Queue_NSW		Job	Jenkins_Loryn	29/05/2018 1:10 PM
Edit Del	Master Job Queue SA	Master_Job_Queue_SA		Job	Sys Admin_FCS	13/06/2018 6:14 PM
Edit Del	SMS Fallback Queue	SMS_Fallback_Queue		Journey Participant	Jenkins_Loryn	21/06/2018 2:28 PM

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

Setup Home Object Manager

Search Setup

queues

Users

Queues

Didn't find what you're looking for?
Try using Global Search.

New Queue

Help for this Page

Queue Edit

Save Cancel

Queue Name and Email Address

Required Information

Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been put in the queue). The email address can be for an individual or a distribution list. When an object is assigned to a queue, only the queue members will be notified.

Label Master Job Queue NSW

Queue Name Master_Job_Queue_NSW

Queue Email mj@franchisecloudsoluti...

Send Email to Members ☐

Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects can then be owned by this queue.

Available Objects

- Document Request
- Error Log
- Event Description
- Expense
- Goal
- Invoice
- Job Eligibility Criteria
- Job Offer
- Job Offer Ranking Criteria
- Job Type
- Journey
- Journey Participant
- Knowledge Article Version
- Lead

Selected Objects

- Job

Add Remove

Queue Members

To add members to this queue, select a type of member, then choose the group, role, or user from the "Available Members" and move them to the "Selected Members." If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.

Search: Users for Find

Available Members

- User: Loryn Jenkins
- User: Port Adelaide Franchise Owner
- User: REC Administrator
- User: REC Marketing Manager
- User: REC Sales Manager
- User: SMS Management Site Guest User
- User: Shane Ross
- User: Shikher Chowdhary
- User: Simon Walker
- User: Thomas Pham
- User: Warren Jones

Selected Members

- User: OPS Administrator
- User: OPS Compliance Manager
- User: OPS Field Manager
- User: OPS Finance Manager
- User: OPS Head Office Manager
- User: OPS Operations Manager
- User: OPS SA Operations Manager

Add Remove

Save Cancel

- Enter the public name of this queue in the `Label` field. The value in `Label` will be visible as the name of the List View attached to this queue.
- Optionally enter a `Queue Email`.
- Optionally select `Send Email to Members`. Members are specified in the **Queue Members** section of the form.
- Select the Object types that will be stored in this queue. This will determine the record types that are placed in this queue.
- Select the users who will comprise the **Queue Members**.
- Press **Save**.

How to identify record ids

Some configuration tasks require the use of Salesforce record IDs. Record IDs uniquely identify a data record.

To obtain a record ID

1. Use the downloadable application Salesforce Data Loader. See “How to import, export and update data in Salesforce” on the facing page.
2. Export the record type that contains the record whose ID you are seeking to identify.
3. Open the exported dataset and locate the target record. The record ID is in the field named ‘Id’.

How to import, export and update data in Salesforce

Salesforce provides the ability to import, export and update data using a downloadable Java-based application named Data Loader. Data Loader is used within Franchise Cloud Solutions applications to

- » load data during system setup
- » obtain record ids for configuration purposes
- » migrate customers from one franchise to another

To download Data Loader from Salesforce

1. From **Setup**, search for *Data Loader*.
2. Click the **Data Loader** page.
3. Follow the on-screen prompts.

To learn how to use Data Loader

- » Refer to [Salesforce documentation on Data Loader](#).

How to identify a Field API Name

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

To determine Field API Names for custom fields

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

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. The 'LABEL' column in the table is highlighted with a green box. The table lists various objects and their labels.

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Account	Account				
Account	Account				
Account Brand	AccountBrand				
Account Contact Relationship	AccountContactRelation				
Action Item	Action_Item__c		30/01/2018	✓	✓
Action Item	FCS_OPS__Action_Item__c		12/06/2018	✓	✓
Activity	Activity				
Activity List	FCS_BASE__Activity_List__c		22/11/2017	✓	✓

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

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. The 'Fields & Relationships' tab is selected for the 'Contact' object. The 'FIELD NAME' column in the table is highlighted with a green box. The table lists various fields and their names.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
# Contacts	FCS_BASE__Contacts_F__c	Formula (Number)		
Accepts Reference Calls	FCS_OPS__Accepts_Reference_Calls__c	Checkbox		
Account Name	AccountId	Lookup(Account)		✓
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Children Additional Info	FCS_REC__Children_Additional_Info__c	Text(255)		
Contact Currency	CurrencyIsoCode	Picklist		
Contact Owner	OwnerId	Lookup(User)		✓
Contact Record Type	RecordTypeId	Record Type		✓

CHAPTER 6

Working with Reports

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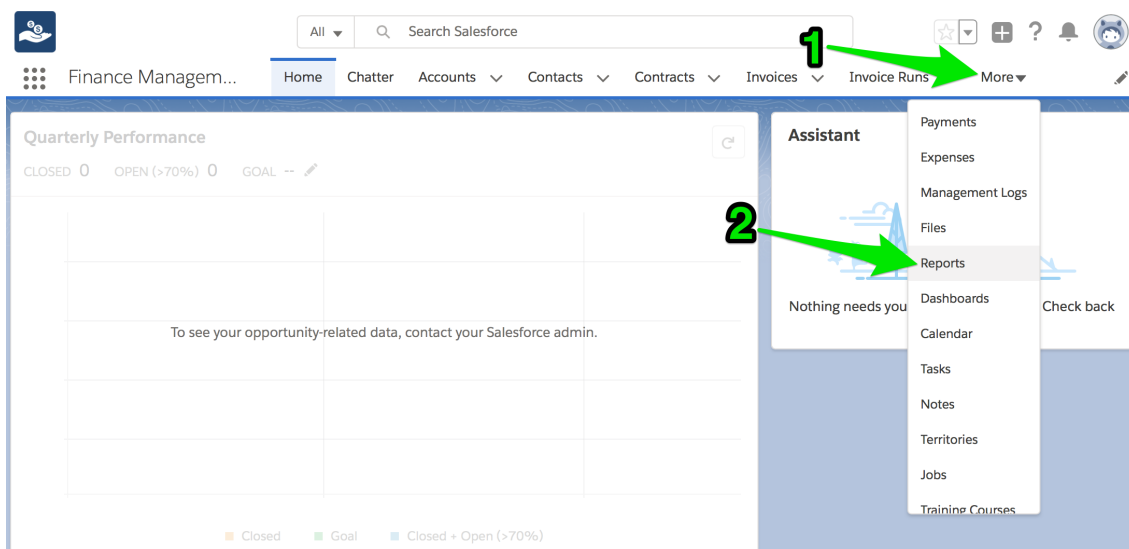
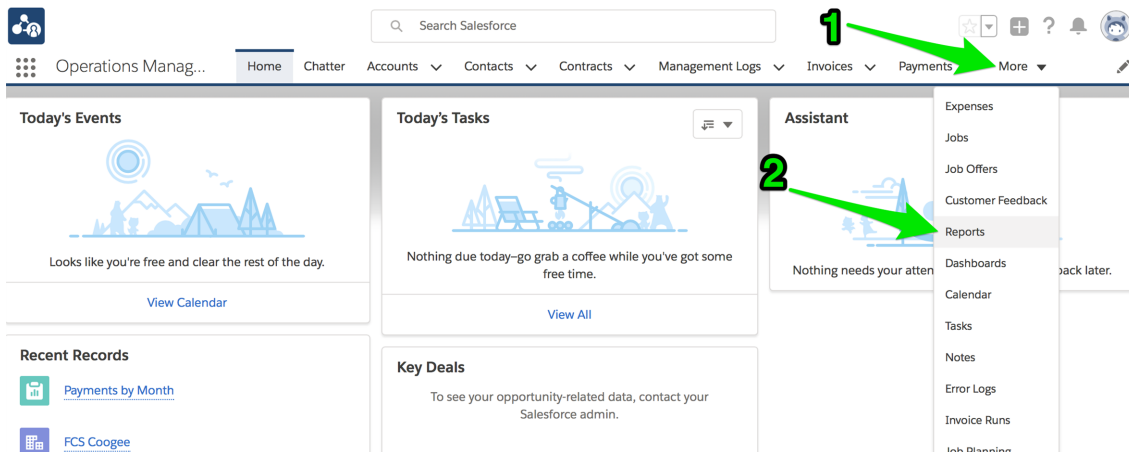
Understanding reports

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.

Operations Manag...

Search Reports and more...

Home Chatter Accounts Contacts Contracts Management Logs Invoices Reports More

Reports
Recent
1 item

New Report

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY
Recent	Payments by Month		Finance Reports	Integration User

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

Created by Me

Shared with Me

All Folders

FAVORITES

All Favorites

Finance Managem...

All Search Salesforce

Home Chatter Accounts Contacts Contracts Invoices Reports More

Reports
Recent
0 items

New Report New Report (Salesforce Classic)

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

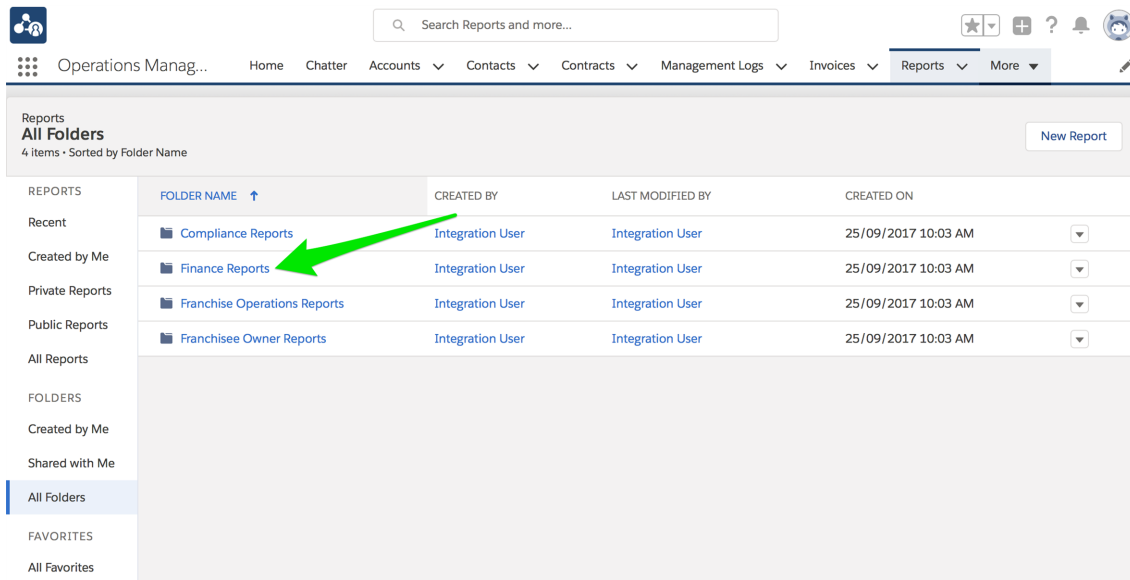
FAVORITES

All Favorites

No items to display.
After you view a report, it appears here.

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

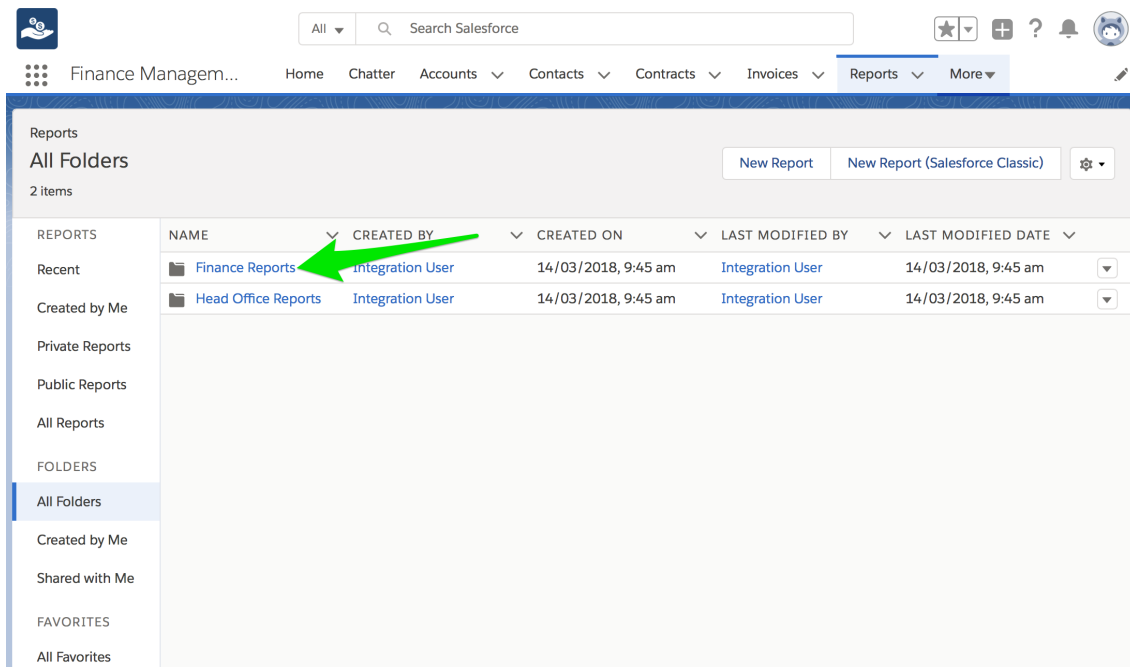
3. Select any one of the report folders.



The screenshot shows the 'Reports' section of the Operations Management interface. The left sidebar lists navigation options: RECENT, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, Created by Me, Shared with Me, All Folders (selected), FAVORITES, and All Favorites. The main content area displays 'All Folders' with 4 items, sorted by Folder Name. A table lists the folders:

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

A green arrow points to the 'Finance Reports' folder. The top navigation bar includes 'Operations Manag...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Management Logs', 'Invoices', 'Reports', and 'More'. A search bar at the top says 'Search Reports and more...'. A 'New Report' button is in the top right.



The screenshot shows the 'Reports' section of the Finance Management interface. The left sidebar lists navigation options: RECENT, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders (selected), Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area displays 'All Folders' with 2 items. A table lists the folders:

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

A green arrow points to the 'Finance Reports' folder. The top navigation bar includes 'Finance Managem...', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Contracts', 'Invoices', 'Reports', and 'More'. A search bar at the top says 'Search Salesforce'. Buttons for 'New Report' and 'New Report (Salesforce Classic)' are in the top right.

Now you can see the reports within that folder.

Operations Manag...

Home

Chatter

Accounts

Contacts

Contracts

Management Logs

Invoices

Reports

More

Search Reports and more...

★

+

?

🔔

👤

Reports

All Folders > Finance Reports

New Report

4 items • Sorted by Report Name

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

FOLDERS

Created by Me

Shared with Me

All Folders

FAVORITES

All Favorites

Finance Managem...

Home

Chatter

Accounts

Contacts

Contracts

Invoices

Reports

More

All

Search Salesforce

★

+

?

🔔

👤

Reports

All Folders > Finance Reports

New Report

New Report (Salesforce Classic)

5 items

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

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

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...

Search Reports and more...

Reports

Recent
4 items

New Report

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY
Recent	Payments by Month		Finance Reports	Integration User
Created by Me	HO Ops Monthly Sales FYTD		Finance Reports	Integration User
Private Reports	Expenses by Week		Finance Reports	Integration User
Public Reports	Expenses by Franchise		Finance Reports	Integration User
All Reports				
FOLDERS				
Created by Me				
Shared with Me				
All Folders				
FAVORITES				
All Favorites				

Finance Managem...

All Search Salesforce

Reports

Recent
9 items

New Report New Report (Salesforce Classic)

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Recent	All Jobs by State & Source		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Created by Me	Jobs Historical Trends		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Private Reports	Zero Job Offers By State		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
Public Reports	Active Territories by State		Head Office Reports	Integration User	14/03/2018, 9:45 ...	
All Reports	Invoice Status Report		Finance Reports	Integration User	29/08/2018, 11:03...	
FOLDERS	Expenses by Franchise		Finance Reports	Integration User	14/03/2018, 9:45 ...	
All Folders	Expenses by Week		Finance Reports	Integration User	14/03/2018, 9:45 ...	
Created by Me	HO Ops Monthly Sales FYTD		Finance Reports	Integration User	14/03/2018, 9:45 ...	
Shared with Me	Payments by Month		Finance Reports	Integration User	14/03/2018, 9:45 ...	
FAVORITES						
All Favorites						

Standard reports

While you can always create your own reports, the reports that ship with Operations Management are summarized below.

Compliance reports



Ships with the Operations Management application.

Report Name	Description
Activated by Month	A summary of contracts organized by activation month, together with key details that characterize contract status.
Activated Contracts by Type	A summary of contracts organized by type, together with key details that characterize contract status.
Compliance - 14 Days from Issue	Listing all contract documents whose signing date is less than 14 days after documents issued vs those contracts whose signing date is greater than 14 days after documents issued.
Deactivated by Month	A summary of contracts organized by deactivation month, together with key details that characterize contract status.
Deactivation in Progress	A summary of contracts with the status <i>Deactivation in Progress</i> , together with key details that characterize contract status.
Deposit Due	A list of franchise profile accounts owing money on the initial deposit.
Open Contracts by Franchise	An historical listing of contracts by franchisee, with a histogram of the number of contracts issued to each franchisee.
Open Contracts by Type	A histogram showing contract start date, secondarily grouped by contract type.
Signed Agreements by Type	The current contracts whose <i>Status</i> is <i>Signed</i> .
Upcoming renewals - Next 3 Months	Contracts due for renewal in the next three months.
Upcoming renewals - Next 6 Months	Contracts due for renewal in the next six months.

Finance reports



Ships with the Finance Management application.

Report Name	Description
Expenses by Franchise	Expense details grouped by period then by type.
Expenses by Week	Expense details grouped by period then by type.
HO Ops Monthly Sales FYTD	Head Office Invoices (for issue to franchisees) grouped by month.
Invoice Status Report	Enable periodic reconciliation with Xero.
Payments by Month	Franchisee payments to Head Office grouped by month.

Franchise Operations Reports



Ships with the Operations Management application.

Report Name	Description
Job Request Conversion	Job requests categorized by <i>Converted</i> and <i>Unconverted</i> Status.
Job Requests in and out	Number of Job Offers by month in <i>Owned</i> and <i>Unowned</i> Territories.
Pending Quotes & Work in Progress	Summary of Job Plans that are pending a decision from the customer.
Quote Conversion %	Number and Value of Jobs that are <i>Converted</i> vs. those that are <i>Unconverted</i> .

Franchise Owner Reports



Ships with the Business Management application.

Report Name	Description
Actual Hours v Target	Count of job offers by week.
Client Growth by Type	New accounts listed by month.
Gross Profit Monthly	Gross profit by month.
Gross Profit Weekly	Gross profit by week.
Invoice Status Report	Enable periodic reconciliation with external financial system.
Job Offers Summary	Count of jobs in each status by created date.
Job Request Conversion Last 90 Days	Converted leads vs job count in the last ninety days.
Job Size Invoiced	Count and sum of actual hours aggregated by job value.
Job Size Profit	Profit aggregated by job size.
Job Size Quoted	Count and sum of quoted hours aggregated by job value.
Job Source Summary	Count of jobs by month.
Job Source v Profit	Profit grouped by job source.
Job Status ALL OPEN	Count of jobs by status.
Job Status Last 90 Days	Jobs by status in the last ninety days.
Open Invoices by Age	Invoice numbers by account by age.
Open Invoices by Customer Name	Invoice numbers by account name.
Planned v Actual COGS	Estimated cost of goods sold (COGS) value vs actual COGS value.
Planned v Actual Hours	Estimated hours vs actual hours by month.

Report Name	Description
Quote Conversion - Last 90 Days	Job count and dollar value as a percentage of quotes issued in the last 90 days.
Quote Conversion by Job Size < \$2,000	Job count and dollar value as a percentage of quotes issued where job size is less than \$2,000.
Quote Conversion by Job Size > \$2,000	Job count and dollar value as a percentage of quotes issued where job size is greater than \$2,000.

Head Office Reports



Ships with the Operations Management application.

Report Name	Description
Active Territories by State	Owned Territories by State.
All Jobs by State & Source	Listing of jobs, statuses, locations and owners by state and source.
All Jobs Last Week ESB	Listing of jobs, sources, statuses, locations and owners along the Eastern Sea Board of Australia.
Ceasing Franchisees	Franchisees whose contracts are in the process of being deactivated.
Job Offer Lead-board by State Last Week	Listing of Job Offers by Franchisee and State in the last seven days.
Job Offers Last Week ESB	Listing of Job Offers by State in the last seven days along the Eastern Sea Board of Australia.
Jobs Historical Trends	Job details grouped by Period and State.
Self Generated Work Last Week	Jobs that did not come from the website or call center in the last seven days.
Territory Only by Billing State	Territories listed by billing state.
Zero Job Offers by State	Listing of franchises receiving no Job Offers within the last seven days.

SMS Management Reports



Ships with the SMS Management option.

Report Name	Description
Journey Actions with Participant Actions	Completed vs Queued Participant Actions by Journey Action
Journeys with Actions	Journeys with at least one Journey Participant
Journeys with Participants	Count of Journey Action Names by Type, ordered by Journey Action Sequence.

DocuSign reports



DocuSign is available for custom implementations only.

Report Name	Description
Average Days to Complete	The average days to completion of all DocuSign Envelopes sent.
Average Days to Complete by Sender	The average Days to completion of all DocuSign Envelopes by Sender
Average Hours to Complete	The average hours to completion of all DocuSign Envelopes sent.
Average Hours to Complete by Sender	The average number of minutes to completion and envelope by sender.
Average Minutes to Complete	The average minute to complete all envelopes sent.
Average Minutes to Complete by Sender	The average number of minutes to complete and envelope by sender.
Envelope Events this Month	Total envelope events this month.
Envelope Events this Quarter	Total envelope events this quarter.
Envelope Events YTD	Total envelope events this year to date.

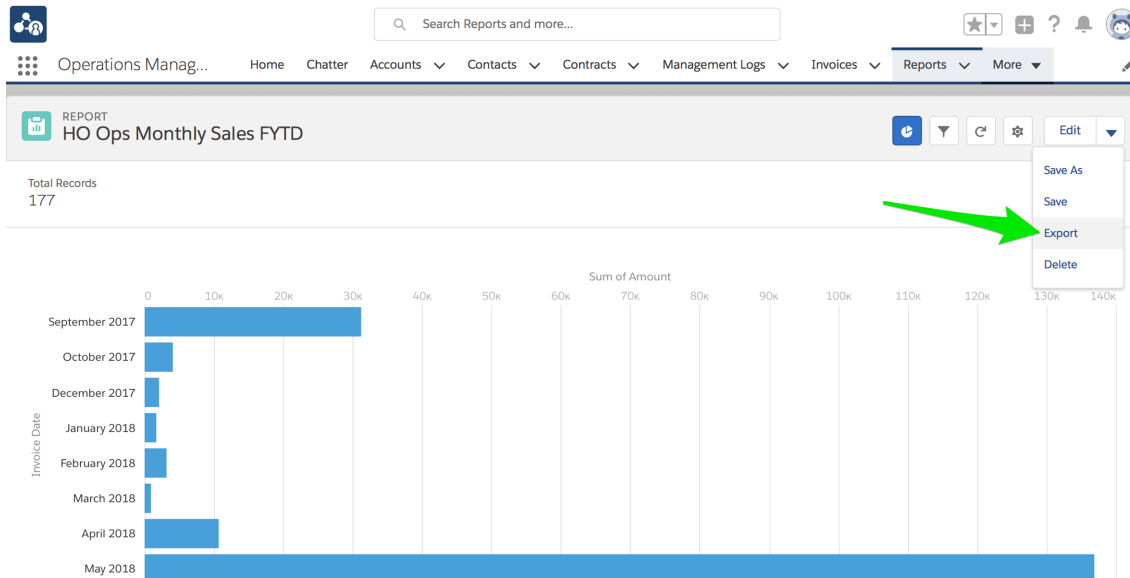
Report Name	Description
Envelopes by Sender this Month	Total envelopes sent this month by sender.
Envelopes by Sender this Quarter	Total envelopes sent this quarter by sender.
Envelopes by Sender YTD	Total envelopes sent this year to date by sender.
In Progress Envelopes	Envelopes sent and not voided,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

How to export a report

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

To export report results

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



The screenshot shows the 'Invoice Status Report' with a table of invoice details. A green arrow points to the 'Export' option in the 'More' dropdown menu.

SYNC STATUS	INVOICE: INVOICE NUMBER	ACCOUNT	JOB	INVOICE DATE	DUE DATE	AMOUNT INC TAX	AMOUNT PAID	AMOUNT OWING	AMOUNT CREDITED	HAS BEEN EMAILED?	STATUS
✓	INV-00003	FCS Ringwood	-	15/10/2018	31/10/2018	AUD 425.00	AUD 0.00	AUD 425.00	AUD 0.00	✓	Open
✓	INV-00004	FCS Ringwood	-	15/10/2018	31/10/2018	AUD 1,001.00	AUD 0.00	AUD 1,001.00	AUD 0.00	✓	Open
✓	INV-00005	FCS Ringwood East	-	15/10/2018	31/10/2018	AUD 1,002.00	AUD 0.00	AUD 1,002.00	AUD 0.00	✓	Open
✓	INV-00014	FCS Ringwood	-	30/10/2018	30/10/2018	AUD 350.00	AUD 0.00	AUD 350.00	AUD 0.00	×	Open
✓	INV-00009	FCS Ringwood	-	8/10/2018	8/10/2018	AUD 363.00	AUD 200.00	AUD 163.00	AUD 0.00	×	Open
✓	INV-00010	FCS Ringwood	-	8/10/2018	8/10/2018	AUD 4,950.00	AUD 3,000.00	AUD 1,950.00	AUD 0.00	×	Open
✓	INV-00013	FCS Ringwood	-	2/10/2018	9/10/2018	AUD 1,036.20	AUD 1,030.00	AUD 0.00	AUD 6.20	×	Open
Grand Total (7 records)						AUD 9,127.20	AUD 4,230.00	AUD 4,891.00	AUD 6.20	3	

The Export dialog box appears.

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

Export

Export View

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

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

Format
Excel Format .xlsx

Cancel Export

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

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

Export

Export View

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

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

Format
Excel Format .xls

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

Cancel Export

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

How to print a report

To print a report

1. Export the report. See “How to export a report” on page 67.
2. Print it using Excel.

CHAPTER 7

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

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

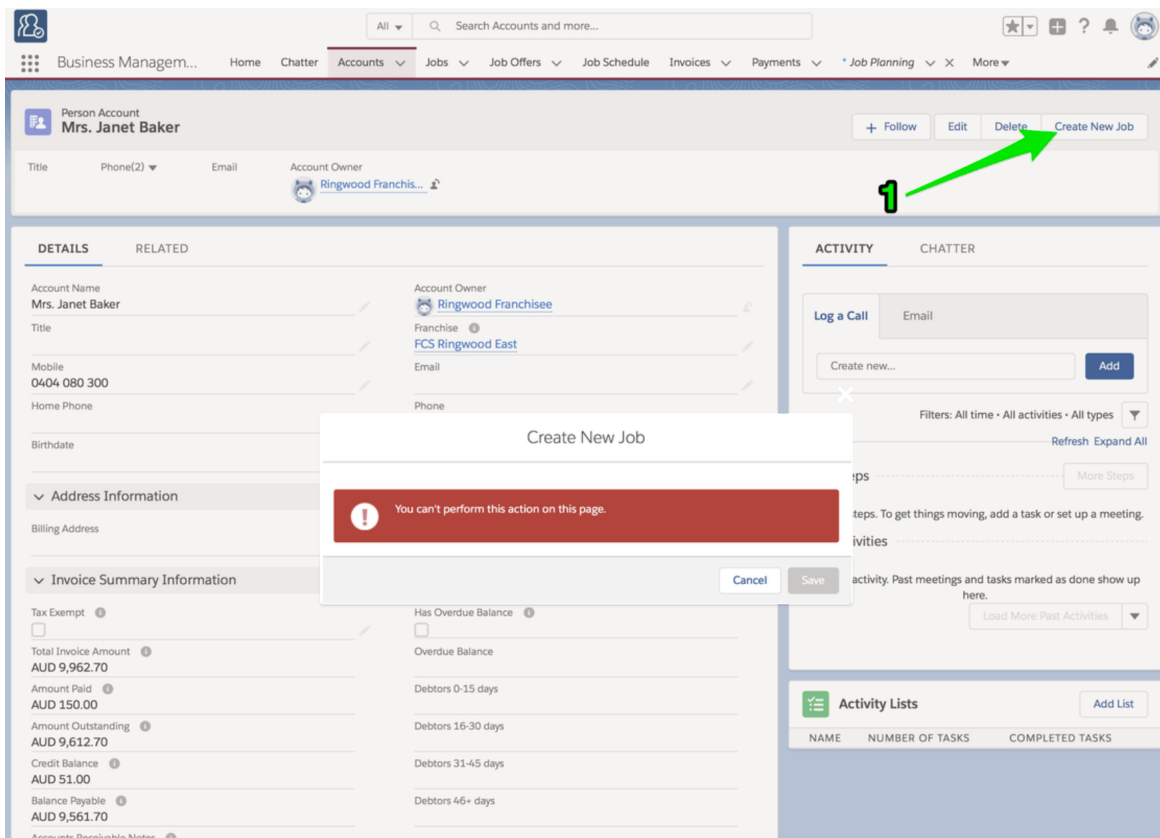
Cannot create new job from a customer's Account page.

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.

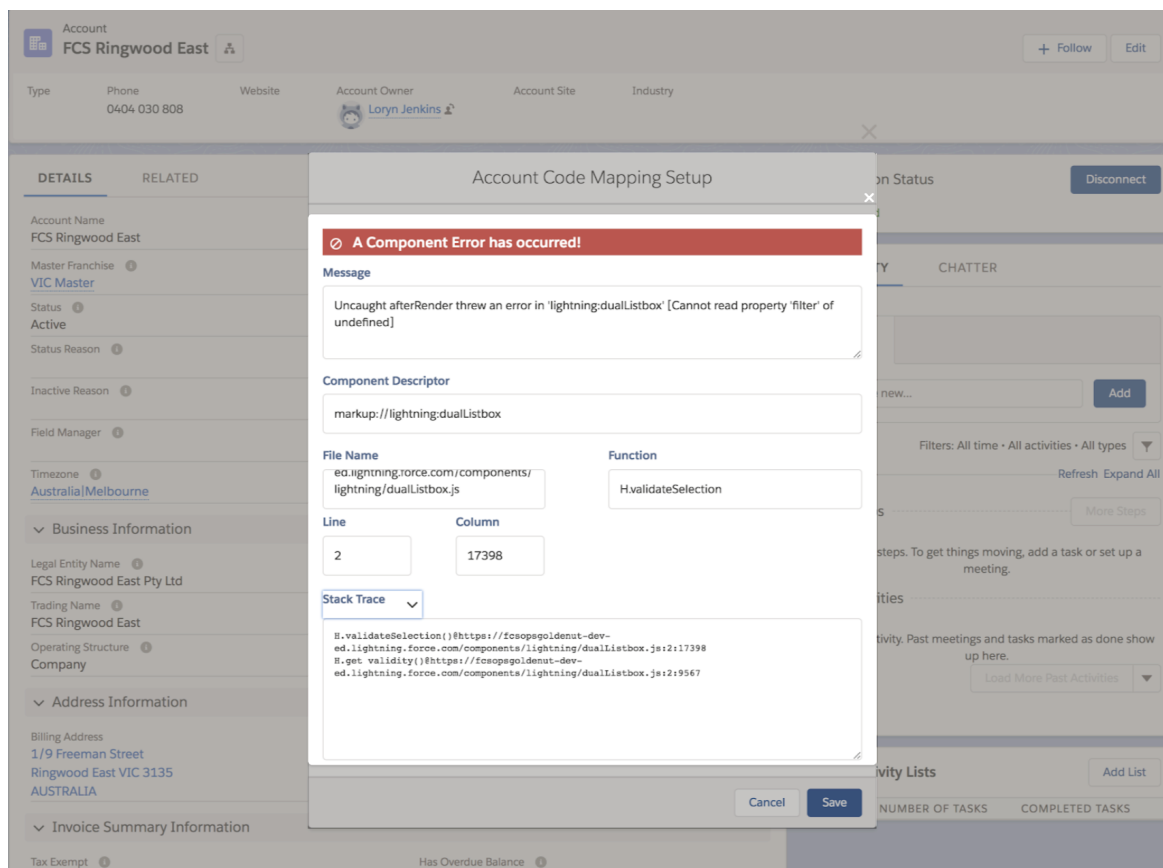
I'm logged into Golden UAT as system administrator.

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.



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.-](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js)

[lightning.force.com/components/lightning/dualListbox.js](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js)

Function

H.validateSelection

Stack Trace

H.validateSelection()@[https://fcsopsgoldenut-dev-ed.-](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js)

[lightning.force.com/components/lightning/dualListbox.js](https://fcsopsgoldenut-dev-ed.-lightning.force.com/components/lightning/dualListbox.js):2:17398

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

[lightning.force.com/components/lightning/dualListbox.js](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

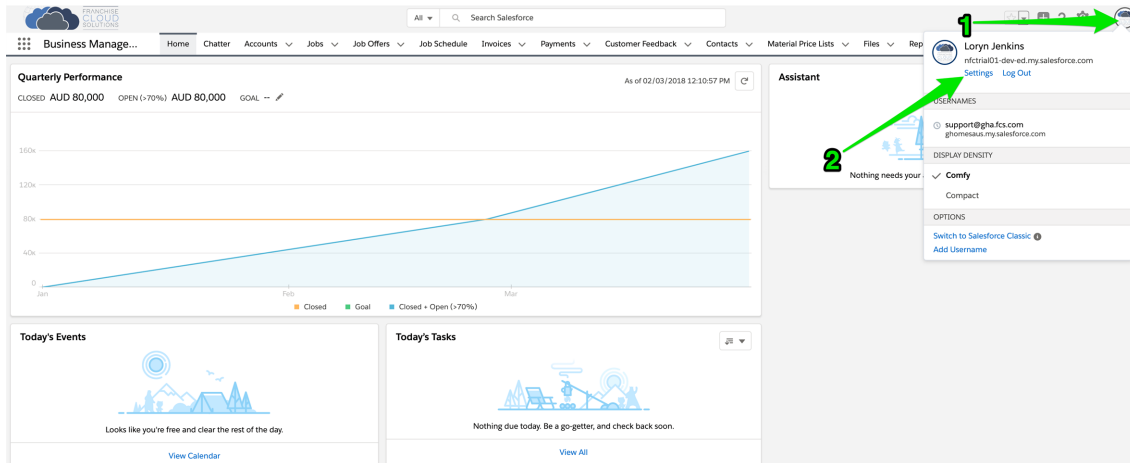
- » Who affected: All franchisees, Users of Job Calendar.
- » Visibility: 40 times per month per franchisee.
- » Block: None.

Granting Account Login Access

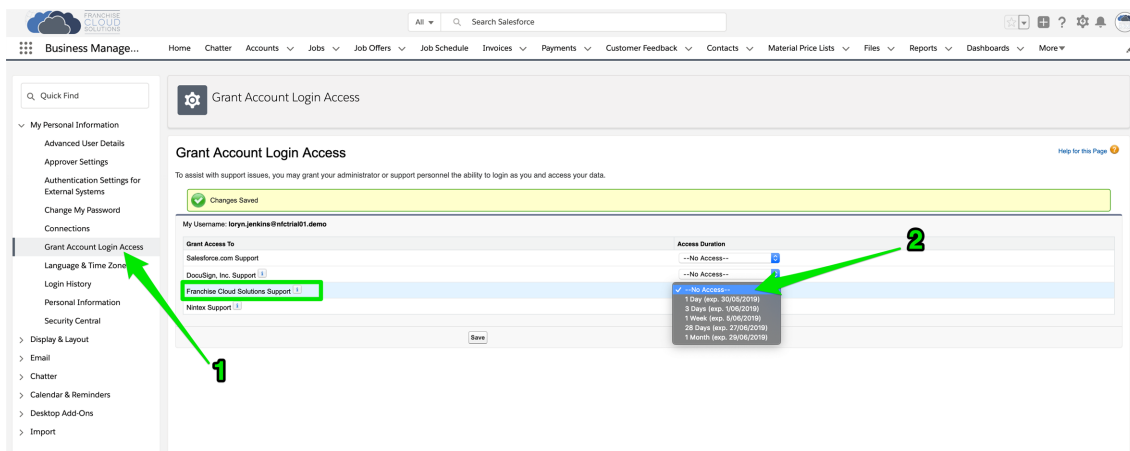
Sometimes, in working with you on a service request, our customer support team may need access to your environment. Here is how to provide the access to our customer support team.

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 'Grant Account Login Access' page in Salesforce. The page has a sidebar with navigation options like 'My Personal Information', 'Grant Account Login Access', 'Language & Time Zone', 'Login History', 'Personal Information', 'Security Central', 'Display & Layout', 'Email', 'Chatter', 'Calendar & Reminders', 'Desktop Add-Ons', and 'Import'. The main content area is titled 'Grant Account Login Access' and includes a 'Changes Saved' message. Below this, there is a table with the following data:

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)
Nintex Support	--No Access--

A green arrow points to the 'Save' button at the bottom of the table.



You can revoke access at any time.