**Franchise Management CRM Project**

**Phase 1: Problem Understanding & Industry Analysis**

**Goal:** Understand what we are building for franchise management and why it is needed.

**1. Requirement Gathering**

* Engage with key stakeholders: franchisor, franchisees, sales managers, support staff.
* Example requirements:
  + Track all franchise locations and their operational status.
  + Facilitate franchisee onboarding, including document collection and approval.
  + Monitor sales, revenue, and performance across all locations.
  + Centralize customer data and manage franchisee-customer interactions.
  + Automate communications, reminders, and approvals for key processes.

**2. Stakeholder Analysis**

* Admin: Responsible for system setup and configuration.
* Franchisee: Manages own location’s data, uploads reports, receives updates and notifications.
* Franchisor/Manager: Oversees multiple franchisees, approves requests, monitors analytics and reports.
* Support Staff: Assists with onboarding, troubleshooting, and compliance issues.

**3. Business Process Mapping**

* Typical process flow:

1. Franchisee submits onboarding request.

2. Admin reviews submitted documents.

3. Manager approves or rejects onboarding.

4. Franchise location is activated.

5. Franchisee submits regular reports and feedback.

6. Manager reviews performance and provides feedback.

**4. Industry-specific Use Case Analysis**

* Franchise networks require standardized operations, compliance checks, and performance tracking.
* Specific needs:
  + Streamlined onboarding and document management.
  + Automated compliance and reporting reminders.
  + Real-time analytics of franchise performance.
  + Centralized communication channels.

**5. Market Exploration**

* Review existing Franchise Management solutions on platforms like Salesforce AppExchange.
* Decision to build a custom CRM for flexibility, tailored processes, and deeper learning.

**Phase 2: Org Setup & Configuration**

**Goal:** Prepare the Salesforce environment to support Franchise Management CRM processes.

**1. Salesforce Edition**

* Confirm you are using a Salesforce Developer Edition or an unrestricted org suitable for development and testing.

**2. Company Profile Setup**

* + Go to Setup > Company Settings > Company Information.
  + Enter company name (e.g., “MVGR Franchise Group”), address, and contact details.
  + Set the correct time zone for your organization’s operations.
  + Choose appropriate currency (e.g., INR or USD) based on your business region.

**3.** **Business Hours & Holidays**

* Navigate to Setup > Business Hours.
  + Define standard operating hours (e.g., Monday–Saturday, 9am–6pm).
* Add Public Holidays under Setup > Holidays.
  + Specify holidays where approvals or business operations are restricted.

**4. Fiscal Year Settings**

* Go to Setup > Fiscal Year.
* Set the fiscal year type (e.g., Standard: January–December) for consistent revenue reporting.

**5. User Setup & Licenses**

* Under Setup > Users, create the following user types:
* Franchisee
* Manager/Franchisor
* Support Staff/Admin
* Assign each user a Salesforce license (e.g., Standard User, System Administrator as needed).

**6. Profiles**

* Create or modify profiles for:
* Franchisee: Limited access—can view/edit own records, submit reports.
* Manager: Full access—can view/manage all franchisee records, approve requests.
* Support/Admin: Configuration and troubleshooting permissions.

**7. Roles**

* Define a role hierarchy:
* Manager (top-level, oversees all franchisees)
* Franchisee (reports up to Manager)
* Use Setup > Roles to set up visibility and reporting structure.

**8. Permission Sets**

* If a user needs extra permissions (e.g., access to reports or dashboards), create a Permission Set rather than modifying their profile.

**9. Org-Wide Defaults (OWD)**

* Go to Setup > Sharing Settings.
* Franchise Location Object: Public Read Only.
* Franchise Reports/Requests Object: Private (only owner and manager can view).

**10. Sharing Rules**

* Create sharing rules if you want franchisees to collaborate or share certain records.
* Example: Allow all franchisees in a region to see regional sales data.

**11. Login Access Policies**

* Under Setup > Login Hours, restrict login hours for franchisees (e.g., 9am–6pm).
* Use Login IP Ranges to restrict access to trusted networks.

**12. Developer Org Usage**

* Use this org as your sandbox for building and testing CRM features and automations.

**13. Sandbox & Deployment (for real companies)**

* In production scenarios, build in a Sandbox and deploy to Production using Change Sets.

**14. Deployment Basics**

* Use Change Sets or Salesforce Ant Migration Tool/SFDX for moving components, objects, and automations from development to production.

**Phase 3: Data Modeling & Relationships**

**Goal:** Establish a robust data structure in Salesforce to support franchise operations and reporting.

**1. Standard & Custom Objects**

* Standard Objects:
* Contact: For storing customer details and communication.
* Account: Can be used for franchise location records if preferred.
* Custom Objects:
* Franchisee: Represents each franchise location or owner.
* Franchise Report: Tracks franchise sales, compliance, issues, and feedback.
* Onboarding Request: Manages franchisee onboarding process, documents, and approvals.

**2. Fields**

* **Franchisee Object:**
* Name: Franchise/Owner’s name.
* Location: Address of the franchise.
* Contact Info: Phone, email, etc.
* Status: (e.g., Active, Pending, Suspended)
* Start Date: Date of activation.
* **Franchise Report Object:**
* Sales Data: Sales figures for the period.
* Issues/Feedback: Any reported problems or feedback.
* Submission Date: When the report was submitted.
* Report Type: (e.g., Monthly, Compliance, Issue)
* **Onboarding Request Object:**
* Franchisee: Lookup to Franchisee object.
* Documents: Uploaded files or links.
* Approval Status: (e.g., Pending, Approved, Rejected)
* Request Date: When onboarding was requested.

**3. Record Types**

* Franchise Report:
* Monthly Report (regular sales and performance)
* Issue Report (problems or incidents)
* Compliance Report (regulatory and operational checks)

**4. Page Layouts**

* Franchisee Page:
* Shows franchise location details, status, contact info, and related reports.
* Franchise Report Page:
* Displays submission details, sales data, issues, related franchisee, and manager comments.
* Onboarding Request Page:
* Includes franchisee reference, submitted documents, status, and approval history.

**5. Compact Layouts**

* Configure mobile and list views showing essential fields:
* Franchisee: Name, Status, Location
* Report: Type, Submission Date, Status

**6. Schema Builder**

* Use Salesforce Schema Builder to visually design and verify relationships between objects:
* Franchisee ↔ Franchise Report: One-to-many via Lookup
* Franchisee ↔ Onboarding Request: One-to-many via Lookup
* Manager/Franchisor ↔ Franchise Report: Lookup, for approvals/comments

**7. Relationship Types**

* Lookup Relationship:
* Franchisee ↔ Reports (one franchisee, many reports)
* Franchisee ↔ Onboarding Requests (one franchisee, many requests)
* Master-Detail Relationship:
* Use if you need cascading deletes or roll-up summary fields (optional, based on requirements).
* Hierarchical Relationship:
* For manager/franchisee hierarchy, generally handled via roles rather than object relationships.

**8. Junction Objects**

* Needed only if a report can be linked to multiple franchisees (e.g., joint ventures).
* Not required for simple one-to-many relationships.

**9. External Objects**

* Use External Objects if integrating with outside databases (e.g., compliance, financial systems).