Create an Organization

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Overview

Within service**minder**, we refer to the **Organization** as an account under the **Brand**. An organization is operated by the franchisee and the Brand is operated by the franchisor. Another way to think of it is each org is a location. One franchisee can own and operate several locations, but they all fall under the umbrella of the franchisor brand.

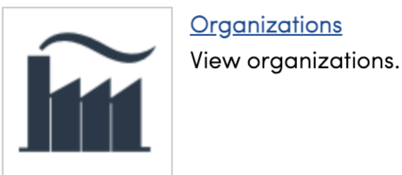
When onboarding a new franchisee or a new location being opened, you will need to create an organization within service**minder**. You can also edit or cancel and existing org if ever needed.

This article will review:

- Settings and Navigation
- Adding an Organization
- Warehouse and Billing Address
- Billing Plans and End of Period
- Territory Ownership
- Optional User
- FAQs

Settings and Navigation

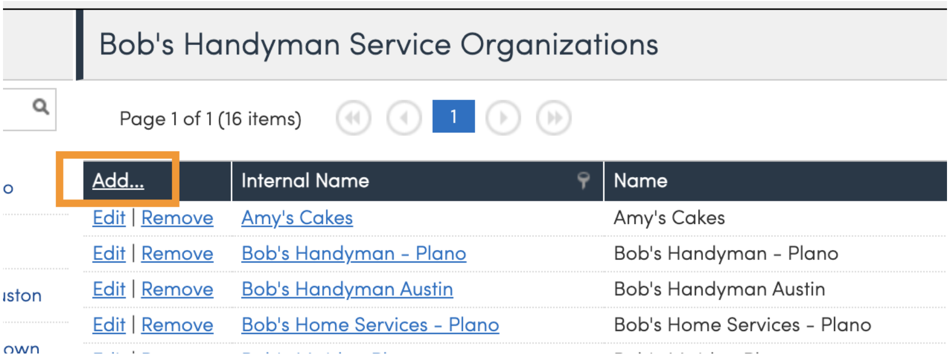
Go to **Dashboard > Tools > Organizations**.



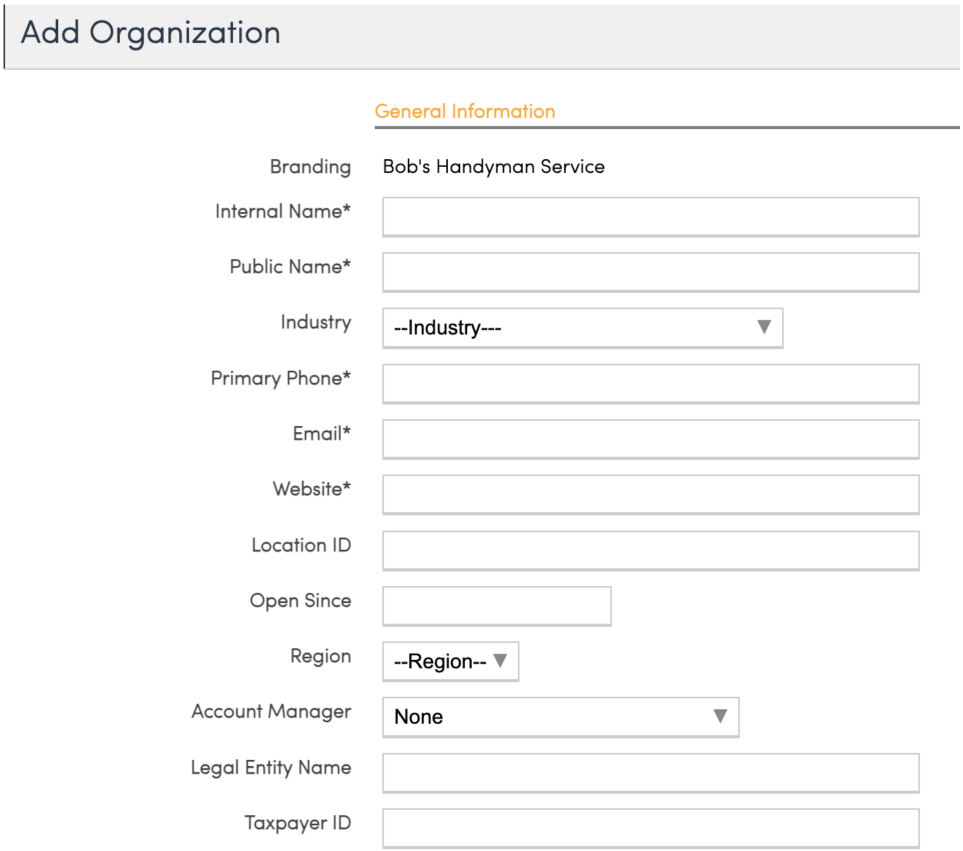
Adding an Organization

Your brand may have a specific process for creating organizations. Please use this as a general guide but defer to your brand regulations and SOP for specifics.

On the **Organization Grid** page, click **Add**.



When adding an organization, you will have to fill in all the fields marked with an asterisk (*).



Required Fields

- **Internal Name** - the default name set by the brand for the location, such as "Bob's Handyman of New York". It should be consistent with all the other organizations in your brand.
- **Public Name** - will default to what you type in for the internal name. An organization admin/owner can change this name if they choose... for example, "Bob's Handyman of NY" - the public name is what will show on proposals/invoices/etc. along with any email/print templates that refer to the organization.name short code
- **Primary Phone -** the primary phone number for the organization
- **Email** - this should be the franchisee's business email (also referred to as the Org Admin). This email will receive all internal communications from the brand along with external communications with customers depending on service**minder** settings.

Be EXTRA CAREFUL not to put spaces when adding email addresses for the franchisees. This will cause issues when owners try to log in for the first time. Even if it looks fine, double check!

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  Website - needs to be a public facing, location-specific website (*not the main brand website*).

Optional Fields

- **Industry -** Select the organization's relevant industry from the dropdown menu.
- **Location ID -** A unique identifier that you assign the organization within your brand.
- **Open Since -** The opening date of the location. This can help with sorting for things like royalty reporting.
- **Region -** select a region from the dropdown menu. Configure Regions in Dashboard > Tools > Settings > Regions.
- **Account Manager -** if applicable, assign a user within service**minder** as the
- **Legal Entity Name -** if the organization has a legal entity name different from their internal or public name
- **Taxpayer ID -** the EIN or any other taxpayer ID registered with the state

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Warehouse and Billing Address

When entering the address properly in the search box, it will pull in from Google maps and auto populate all fields associated with the address including the zip code.

Enter the address in the box marked with the search icon! This search box utilizes Google maps for accurate positioning for your address. Manually entering your address will only lead to issues when scheduling.

The **Warehouse** is wherever your agents leave from or your office. Our system will use this address to calculate route drive times, this address will appear on your proposals/invoices, and the shortcode {organization.address} will refer to this address should you use it in emails.

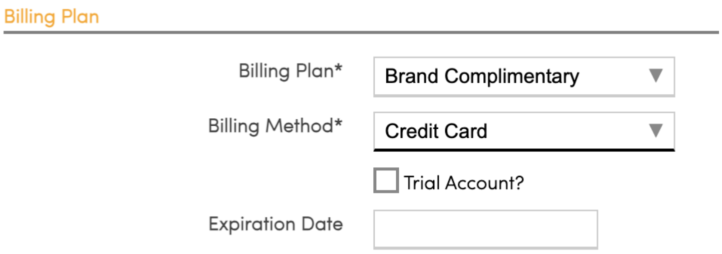
There is a separate address if you have a different billing address but the process is the same. Only add the address using the field marked with the magnifying glass.

Billing Plans and End of Period

Billing Plans and **End of Period** reporting are unique to each brand. Please refer to your brand SOP or an existing org to determine how to fill in those sections.

Typically, **Brand Complimentary** in the billing plan is for new orgs that have a pre-determined time to get access to their account, start learning service**minder**, and start building out their org before their "go live" date. Their go-live date is when their billing will start. The brand can either have the franchisee's credit card charged directly or you can choose to have the brand pay upfront and invoice or charge the franchisee separately.

To set the go-live date, fill in the **Expiration Date** field.

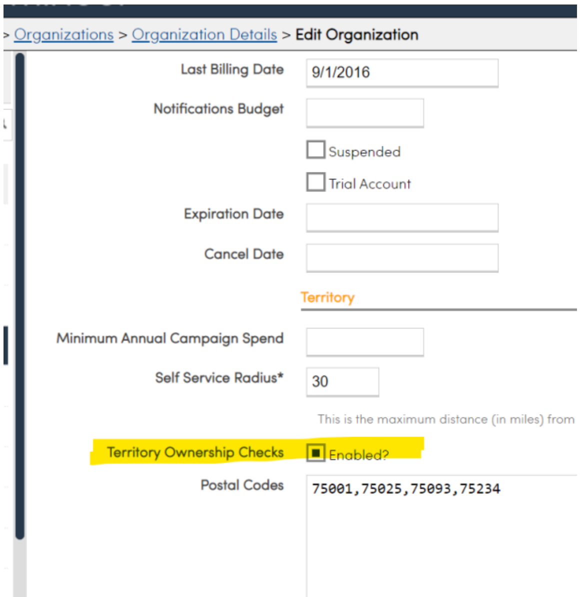


Territory Ownership

When adding/editing an organization, you add postal codes to designate the area that location services. Enter the zip codes for the brand new org and, by default, they will receive a error if they try to work a lead in another franchisee's territory.

However, some brands may allow locations to service customers in another's territory. For example, San Antonio might give permission to Austin to have a customer that's in their area.

To allow this, you can edit the**receiver's** organization details (in this scenario, that would be Austin.) Uncheck the **Territory Ownership Checks** and save. This means Austin won't get an error when trying to add a customer that's outside of their area.



If this situation applies to the new org you can turn this on or off depending on need. Once the customer is added, you can turn this back on.

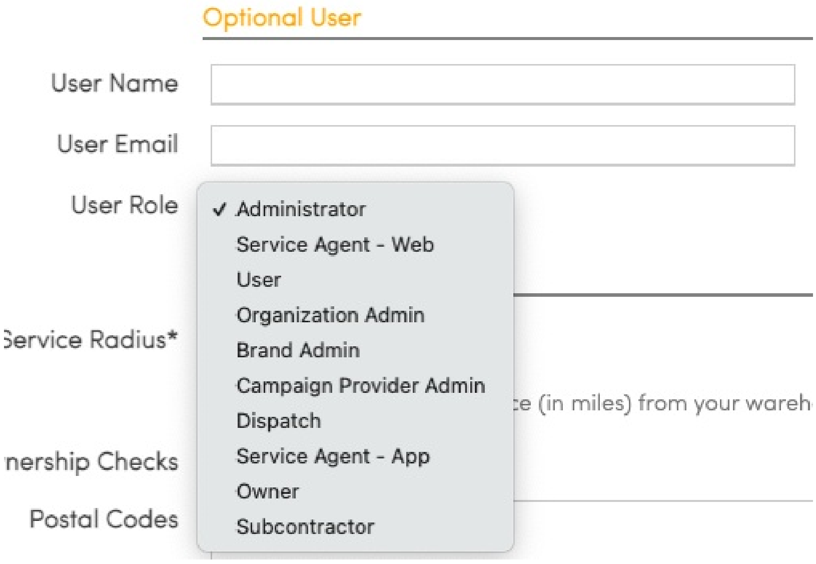
Optional User

Make sure when filling out the info for the new Organization that you fill out the "Optional User" this will create the user for the new location's owner so they can login.

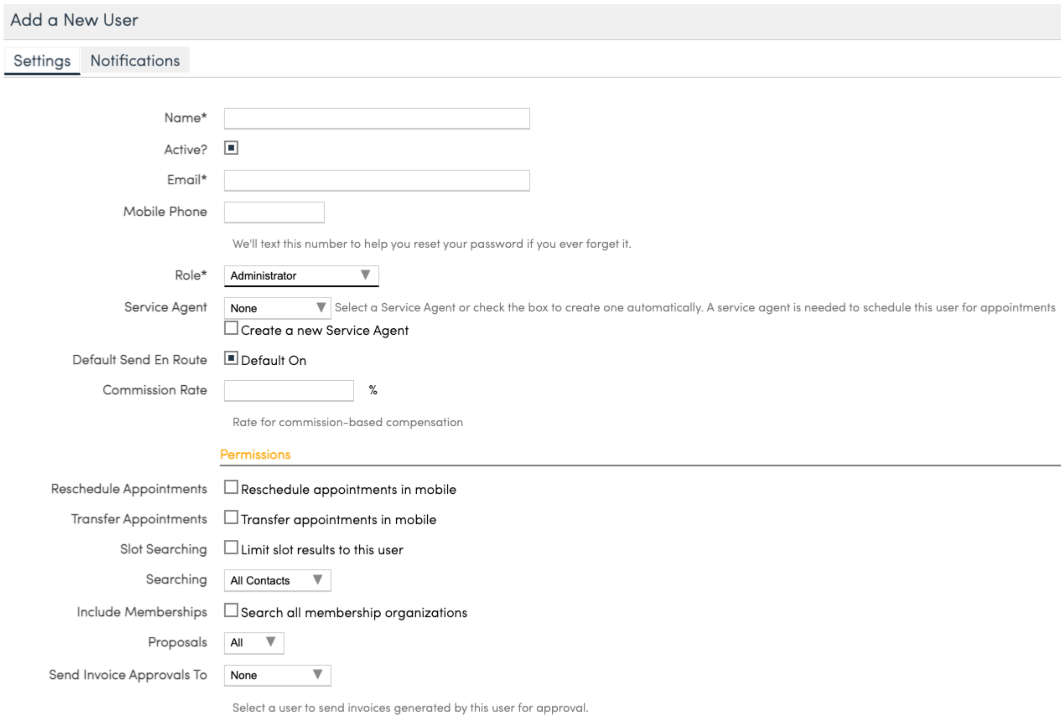
If the new organization's owner already existing as a user, then don't fill it out. If they are new to SM, then fill this out.

What you choose as the **Role** for the user may vary by brand preference. However, typically the franchisee receives the **Owner** or **Organization Admin** role.

Do not give franchisees the **Brand Admin** role. They will be able to access everything within your brand, impersonate other users. Brand Admins is a role typically reserved for the franchisor operations team.



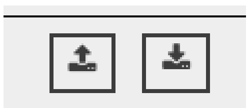
If you choose to skip this step for now, you can always go into the correct **Organization > Control Panel > Users > Add**.



If you would like assistance from the Support team to complete the rest of the setup process after you do these steps but aren't sure how to write that request, please review Support Ticket Templates for Brand Admins.

Bulk Add or Edit Organizations

When viewing the Organizations grid, you will see an upload and download option in the top right corner of the screen. These options only work with CSV files, so make sure to save your spreadsheet as that file format.



You can upload a list of organizations to create them in bulk. Just make sure that you have a column for each required field (listed above) and that the headers of each column match the valid column names provided on the upload page.

If you want to update certain fields for all organizations, you can download your current list into a CSV file. Then, make your updates to the spreadsheet, and upload the new file back into service**minder**. For example, you could add or edit the Location ID for all organizations in the spreadsheet, then upload that file, and it will update that field for all relevant organizations in the system.

FAQs

If I have a question about what to do to create and deploy a new org, who can I reach out to at serviceminder?

Your brand may have an Account Manager assigned from service**minder**. You can ask them directly for help, especially if you are new to the brand. Another way is to send a support ticket from the Help section. Someone from our client success team will receive the ticket and assist you.

What if my brand doesn't have an SOP or any instructions on how to correctly set up their orgs?

Our suggestion is to pull up an existing organization with a franchisee that you trust to do things correctly and use their org as a template. This works for deploying fields as well. You can use their parts, services, and other deployable fields for new orgs. Just be sure that you are in their established organization when you deploy to the newly created org.

Is there a way of splitting the territory into two, for example, territory east and territory west, so that you can track the revenue of each territory separately?

Geozones might be what you're looking for. After setting up Geozones, the revenue will track on each. Accounting classes can also be used in conjunction with Geozones, and will push over to QBO.

Is there a report that can be run to identify clients that are "out of Territory" for the location that services them, and that would potentially be within a new owners territory? These out of territory customer reports need to be run for new locations as they launch services.

There's a report you can use in **Dashboard > Reports** called **Postal Code Conflicts**. If the new org/orgs have their zip codes set up, then any contacts in other orgs under those zips should show up there for you to review.

Use the top filter to search under the **In Organization** column.

You may have to download the whole report and filtering there, or just doing Ctrl + F on the page and finding the org you're looking for that way (and maybe filter down to the In Organization to an extent that way.)

There are multiple clients that are out of territory for the “in Organization” that actually belong to other orgs. How would we facilitate having those clients moved to the “Owning Organization”?

There are two ways to do it - one would take a little longer but would give you more control, while the other is faster but more of a blanket move.

Transfer contacts by zip code, in bulk. In **Dashboard > Tools** tab **> Transfer.** Here you can enter a zip code, or more than one separate by commas, and then designate an org to move the contact FROM and TO. This would take all contacts from the first org that are in those zips and move them at once.

Move contacts individually. In **Dispatch**, you can search the contact's name and select them. Click the **Move** button, pick the org they need to move to, and move them over.

How do Canadian Postal Codes need to be entered into the system? Our Franchise Agreements all include the 3 character prefix instead of listing each individual code.

Enter the first three letters and an asterisk to get all the codes in that territory, i.e.: K1S*