## CES Login and Profile Setup

## Introduction

This document will walk you through how to login to CES and update your franchise profile.

## Steps to Login

- 1. From a web browser, go to <u>https://portal.dwyergroup.com</u>.
- 2. Enter your email and password into the provided boxes and click "LOGIN"

peighborlur
a community of home service experts
Login to CES
Email
email@dwyergroup.com
Password
LOGIN
Forgot Password?
Need help? Email the help desk at

3. If you don't know what your password is, you can use the "Forgot Password?" link at the bottom of the screen to get back into your account.

LOGIN	
Forgot Password?	
Need help? Email the help desk at CECHelpDesk@dwyergroup.com	
	LOGIN Forgot Password? Need help? Email the help desk at CECHelpDesk@dwyergroup.com

4. From the home screen, expand the Administration link on the left.



5. Underneath Administration, you should see a link for the profile of every franchise you have access to. Click on the link to access the profile.



6. Once in the profile, utilize the available sections to set the configurations as appropriate for your franchise. Note that some sections auto-save, while others will require you to press a save button at the bottom of the section.

			Franchise	Profile	
			Last Updated: 7/24/201	18:12 PM 0	
			What is your CES From	Anne Profile?	
Dusiness Name Test	Account Code MRR30200	Business Owner Test, Test	Address Waco, TX Logal Finite		
(254) 745-2521		Click here	GATTA		
Call Caster Informatio	a C Fara Services	Otherast 0 Constants Law	d State Hours of Operation 0		
Time mee			Override Basiness Share	Same Day Scherkelinn	
(UTC-05.00) Central	Time (US & Canada)			Iz Not Available	
Call Center Promotio	ns				
Format + 1					
Call Center Additiona	Information sense on sen				
Format + 1					
Add Priority Message					
Save Pieble Info					

## Sections of the Franchise Profile

 Physical Business Information – This section shows the basic franchise information that is stored in our data warehouse. This information is fed by systems (ex. FranConnect/Naranga) used by the Legal and Operations teams and is not changeable by the franchise through CES. To change this information, the franchise should work with their Franchise Consultant.

Business Name	Account Code	Business Owner	Address
Test	MRR30208	Test, Test	
			Waco, TX
Business Phone	Email Address	Website URL	Lead State
(254) 745-2521		Click here	GREEN

- Call Center Information This section holds key information to be used by call centers that are integrated with the CES. Here, you can set the following:
  - Time zone This is the time zone utilized by the franchise
  - Override Business Phone Here you can specify a different phone number to use that will override the business phone number listed in the Physical Business Information section.
  - Same Day Scheduling This tells the call center whether the franchise will allow same day scheduling.
  - Call Center Promotions This allows the franchise to make the call center aware of any promotions that may be active at the time.
  - Call Center Additional Information This allows the franchise to input any additional information and notes that the call center might need to know.
  - Priority Message This is a flag that tells the call center that the notes entered are very important and it is a priority that they read them.

all Center Information 🕚	Fees Service	es Offered 🕕	Contacts	Lead State	Hours of Operation ()		
me zone			Ove	erride Business F	hone	Same Day Scheduling	
(UTC-06:00) Central Time (U	JS & Canada)	Ŧ				D Not Available	
all Center Promotions							
ormat v B I	<u>⊔</u> ≡ ≡ ≡	≡ 1≡ +≊	⊕ ⊠				
all Center Additional Inform	nation (Holiday Hours, Eve	ints, etc. )					
all Center Additional Inform	nation (Holiday Hours, Eve	nts, etc. )	co 😰 🏢				
all Center Additional Inform	nation (Holiday Hours, Eve	nis, etc.)	69				
all Center Additional Inform	nation (Holdsy Hours, Eve U	nts, etc.)	69				
all Center Additional Inform	nation (Holday Hours, Eve	nts, etc. )	69 🖬				
all Center Additional Inform	nation (Holday Hours, Eve U E S E	nis, etc.)	∞ ☑				
all Center Additional Inform	nation (Holday Hours, Eve UESS (Holday Hours, Eve	ets. etc. ) E E 42	∞ ☑				
all Center Additional Inform	nation (kiday Kors, Ew 말 문 중 국	nts, etc.)	co 🖬				
all Center Additional Inform	nation (Holday Hous, Eve U E S E	nts.etc.)	co 🖬				
all Center Additional Inform	nation policy Hous, Ew	nis, etc.)	∞ ☑				
all Center Additional Inform	nation (Helday Hours, Ew	nts, etc. )	00 Q III				
all Center Additional Inform	nation (Holday Hours, Eve U E S 3	#5. etc. )					

• Fees – This section is used to setup the fees that are charged by the franchise. Note: this section is initially populated by the brand defaults. In addition to the standard fees that are automatically shown on the profile, the franchise can add custom fees as well in order to tailor this section to their business. Fees can also be overridden at a postal code level if the rates vary by postal code.

Call Center Information () Fees	Services Offered () Contacts Lead State	Hours of Operation ()
Default Service Fee Types (1)		
Fee Name	Fee 🛓	Is Waived Remove Create
Postal Code Fees (1)		
[+] Expand All		
Fee Туре	▼ Fee ♦ Postal	Code • SWaived Create

- Services Offered This section allows the franchise to configure the standard services offered to their business at both commercial and residential levels. Note: this section is initially populated by the brand defaults. Each service can be updated to one of the following statuses:
  - Normal Service This service is offered
  - High Priority This service is offered and should receive high priority treatment
  - Unavailable This service is not offered by the franchise

Call Center Information ()	Fees	Services Offered	0	Contacts	Lead State	Hours of	Operation	0
Service	Re	sidential		Comr	nerical			
Clogged Drains	~	Normal Service	٣	× 1	Normal Service			
Damaged Sewer Lines	~	Normal Service	۳					
Diagnosis and Checkup	~	Normal Service	٣	🛩 1	Normal Service	Ŧ		
Drain Cleaning	×	Unavailable	۳					
Emergency Plumbing Services		High Priority	*		ligh Priority	Ŧ		
Frozen Pipes	~	Normal Service	v	× 1	Normal Service	*		
HydroScrub® Drain Cleaning	-	Normal Service	٣	· • 1	Normal Service	v		
Installation and Upgrades	~	Normal Service	*	🗸 I	Normal Service			
Leaks	×	Unavailable	٣					
Other Common Repairs	~	Normal Service	٣					
Plumbing Camera Inspection	×	Unavailable	*	🗸 1	ormal Service	Ŧ		
Plumbing Repairs	×	Unavailable	*					
Sewage Backups	~	Normal Service	*					
Sewer Line Replacement	×	Unavailable	*					
System Maintenance and Clean	ng 🗸	Normal Service	*	💌 I	Normal Service	v		
Test Service	~	Normal Service	*	· • 1	Normal Service	v		
Trenchless Pipe Repair	0	High Priority	Ŧ					

- Contacts
  – This section allows the franchise to enter contact details for their business. It is
  broken in to two parts:
  - *Contact Information* Here the user can add multiple contacts for the franchise. For each contact, the following settings are available:
    - Contact Name This is a display name used to identify the contact
    - Email This is the email address to contact
    - Phone # This is the phone number to contact
    - Position This is the role the individual plays within the franchise

Contact Information (1)					
Final Fallback Contact () Select Contact •					
New Contact					
Name *	Position	Phone T	Email		
John Smith	Technician	555555555555555555555555555555555555555	test@test.com	 x	^

 Contact Assignments – This section allows the franchise to configure notifications to be sent to their contacts based on time since the lead was generated and whether or not the communication is happening inside or outside of business hours.

Contact Assignments (1)						
Default						
Regular Business Hours						
New Contact Assignment						
Name	Minutes from First Communication	Send Email	Send Text	Phone Call		
John Smith	0	V	0	V	ø	÷
After Hours						
New Contact Assignment						
Name	Minutes from First Communication	Send Email	Send Text	Phone Call		
John Smith	0	Ø	¥	V	ø	* •

- Lead State This section allows the user to toggle the lead flow state which affects how early leads/jobs/estimates can be scheduled by the call center. The states are defined as follows:
  - Green The franchise is ready to handle jobs/leads/estimates as soon as possible. (The minimum time before a job/lead/estimate can be booked on the calendar is set at the brand level)
  - Yellow The franchise can accept leads/jobs/estimates, but needs additional time padding before new leads/jobs/estimates can be fulfilled due to the current work load. (The minimum time before a job/lead/estimate can be booked on the calendar is set at the brand level)
  - Red The franchise is not accepting leads/jobs/estimates due to being closed or some other disaster.

Green is the default state. Changing to Yellow or Red will require a start and end date for when that status will be in effect.



- Hours of Operation This section allows the franchise to setup their normal hours of operations as well as their after-hours availability. Note: this section is initially populated by the brand defaults. There are 2 entries for each day: one for Normal Hours and one for After Hours. For each of these entries, the user can set the following:
  - Availability Indicator This allows the franchise to toggle between Open and Closed during regular hours, as well as Available and Unavailable during After Hours.
  - $\circ$   $\;$  Starting Time This allows the franchise to set the starting time for the entry.
  - Ending Time This allows the franchise to set the ending time for the entry.

Call Center Information ()	Fees Services Offered ()	Contacts Lead State	Hours of Operation ()			
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Regular Hours - Open	Regular Hours - Open	Regular Hours - Open	Regular Hours - Open	Regular Hours - Open	Regular Hours - Open	Regular Hours - Open
8:00 AM 5:00 PM	8:00 AM 5:00 PM	8:00 AM 5:00 PM	8:00 AM 5:00 PM	8:00 AM 5:00 PM	8:00 AM 5:00 PM	8:00 AM 5:00 PM
After Hours - Available	After Hours - Available	After Hours - Available	After Hours - Available	After Hours - Available	After Hours - Available	After Hours - Available
12:00 AM 12:00 AM	12:00 AM 12:00 AM	12:00 AM 12:00 AM	12:00 AM 12:00 AM	12:00 AM 12:00 AM	12:00 AM 12:00 AM	12:00 AM 12:00 AM
Save Hours of Operation						