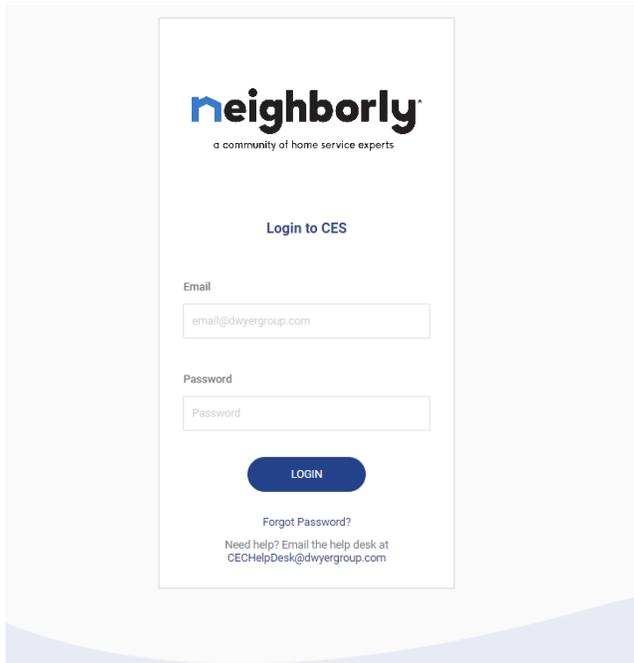# CES Login and Profile Setup

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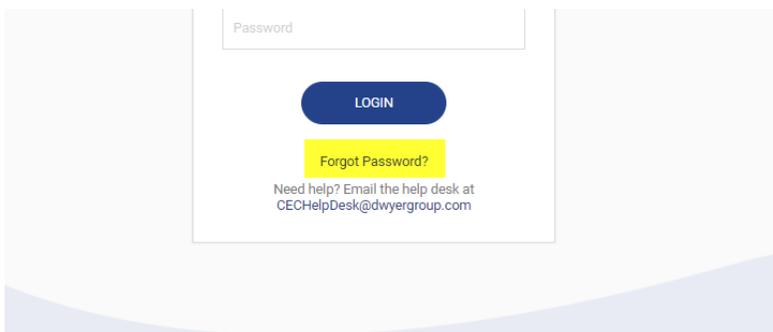
This document will walk you through how to login to CES and update your franchise profile.

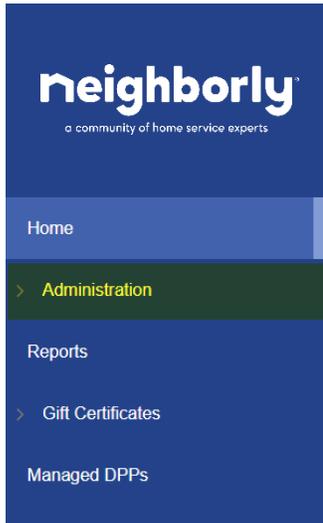## Steps to Login

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

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.

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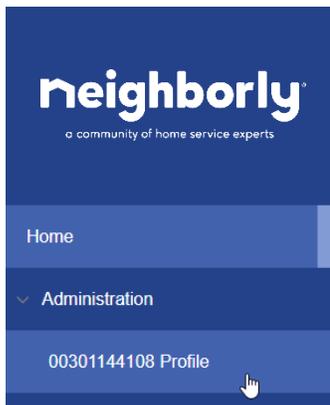
6. Once in the profile, utilize the available sections to set the configurations as appropriate for your franchise. Note that some sections auto-save, while others will require you to press a save button at the bottom of the section.

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.

- **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.

- **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.

- **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

- **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

- o *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.

- 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:
  - o 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)
  - o 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)
  - o 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.
    - 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