FRM Solutions, Inc

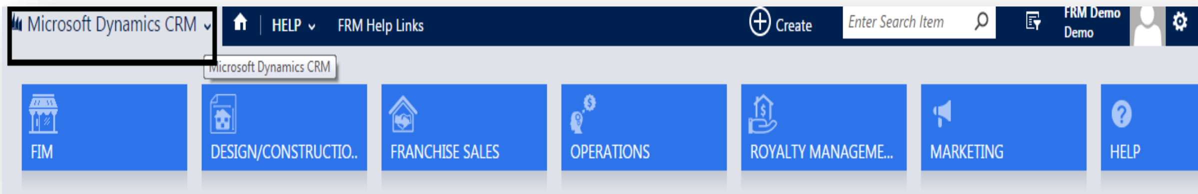
Global CRM Topics

Updated 11/26/2017

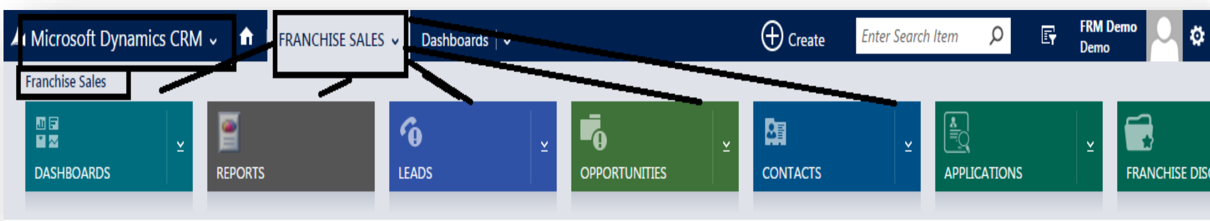
Contents

Navigating CRM

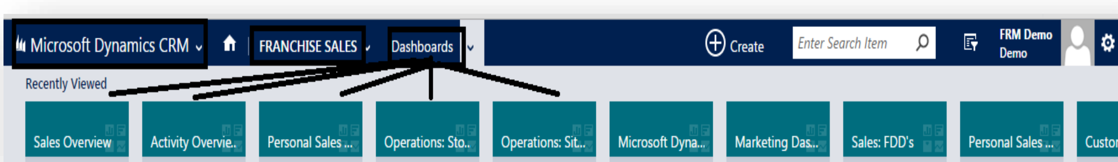
1. On the FRM home page select the **Microsoft Dynamics CRM** drop-down, from there you will be able to access all FRM modules available to you.



2. Once you select a module from the **Microsoft Dynamics** drop-down, you will notice that the view in the menu bar will change to reflect the selected module and you will be able to further drill down into related areas. The below example is **Franchise Sales** with its related entities/options.

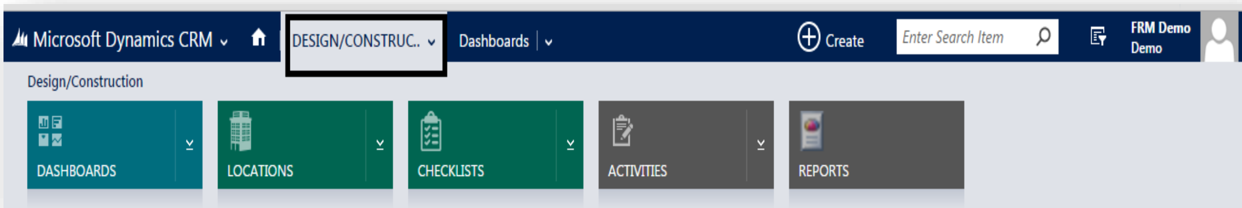


3. Based on your needs, you can further drill into a sub-area of the area you have previously selected. This activity will also be reflected in the menu bar. Here you will have options to further drill into more detailed views. You may also see **Recently Viewed** records as per the below screenshot.

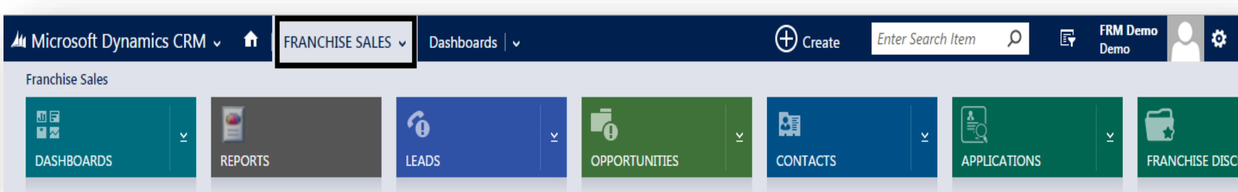


FIM: Franchise Information Management – FIM will serve as your primary repository for franchise location, company and contact information. Here you can verify the locations, access your contacts, company records, view activities (such as email and phone calls) and run reports.

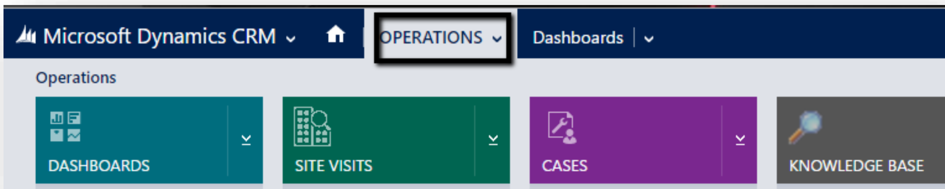
Design/Construction: Also referred to as the Project Management or Store-Opener module – here one can review all open checklists as well as build new checklists or review your Store-Opening/Checklist dashboard.



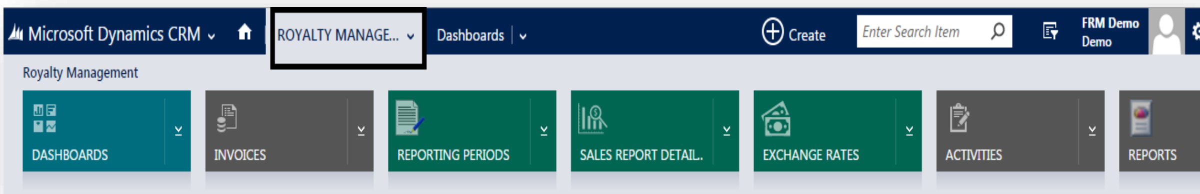
Franchise Sales/Franchise recruiting: All Franchise Sales related data is stored here, such as Leads, Applications and FDDs.



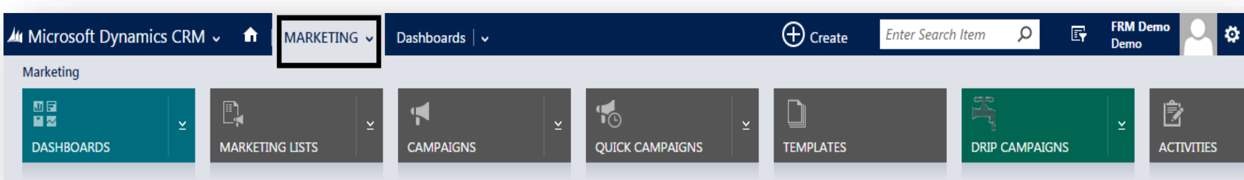
Operations/Site Visits: Information related to Franchise Operations can be found here, including Site Visit records and support cases.



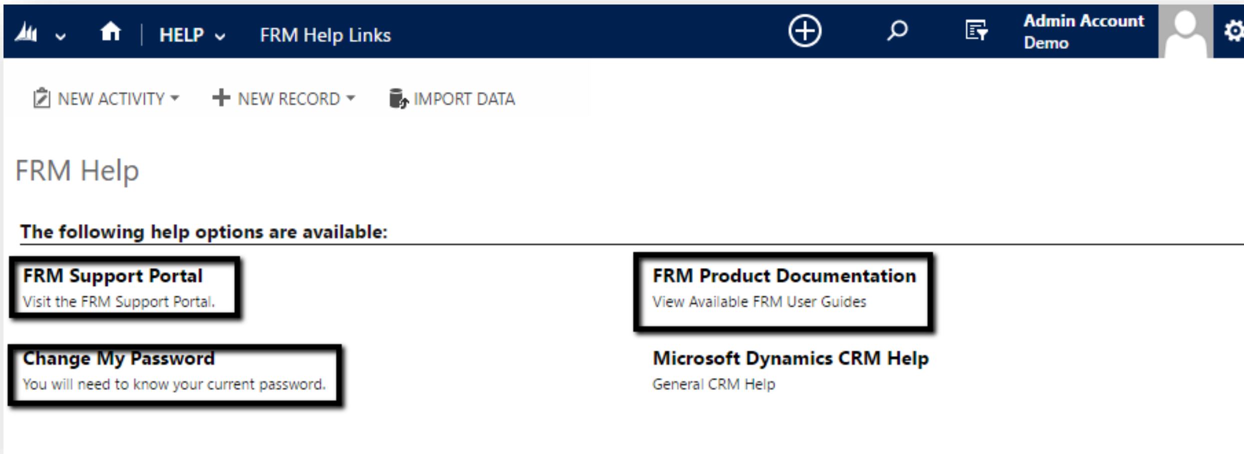
Royalty Management: Repository for Royalty management and invoicing information.



Marketing: The Marketing module allows you to build marketing campaigns/distribution lists and configure drip campaigns.



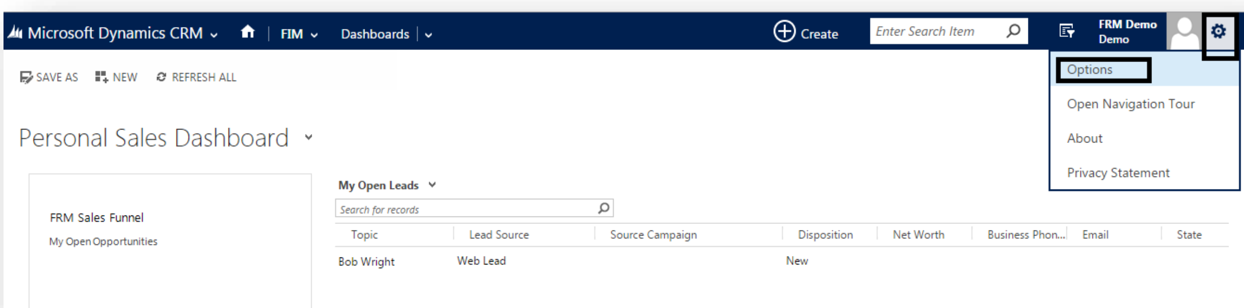
Help: Offers direct access to the FRM support portal for case submission & case management. Also provides ability for users to change their FRM passwords and access production documentation which is continually updated.



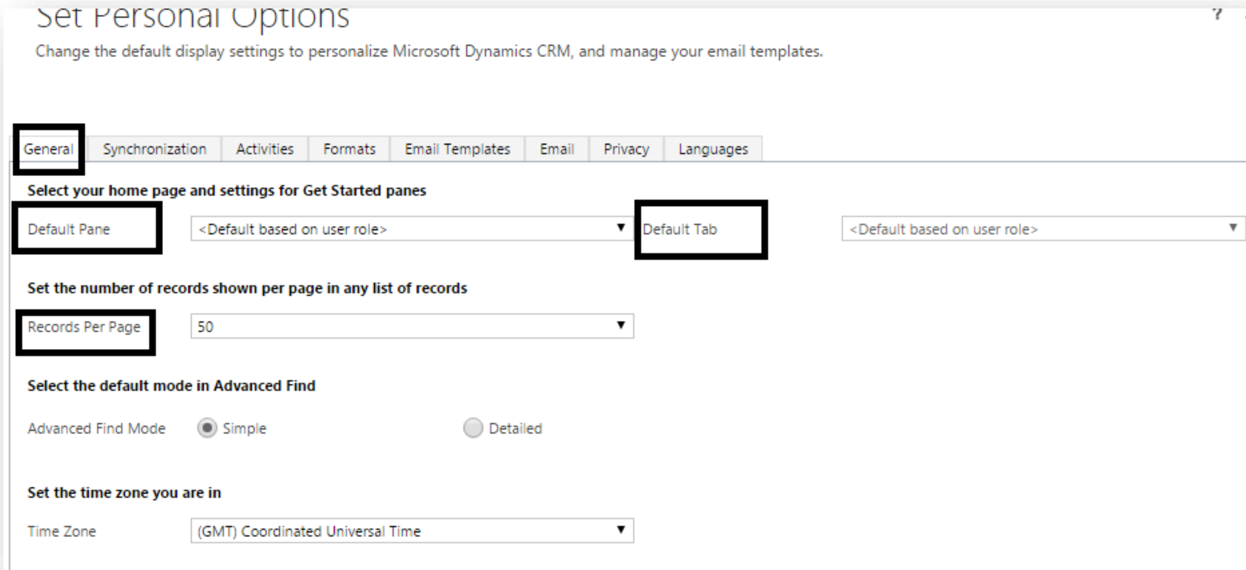
Setting Up Personal Options

Microsoft Dynamics allows you to customize your default view providing the user opportunity to get to their most commonly used records/entities immediately upon login.

1. On the FRM home page, in the upper-right corner, click on the icon next to your profile picture and select **Options** from the drop-down:

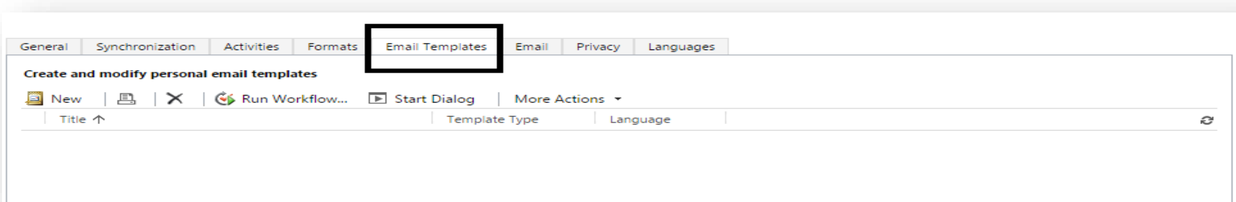


2. In the pop-up window (**Set Personal Options**), the main settings are found on the **General** tab:



3. Based on your role, you can choose the **Default Pane** and **Default tab** to personalize Microsoft Dynamics CRM. By default FRM will display 50 records at a time. This can be increased to 250 by changing the **Records Per Page** setting.

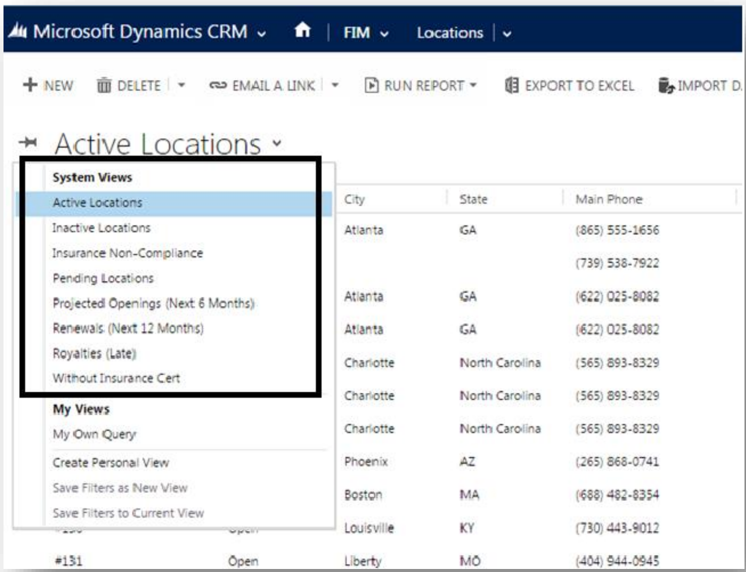
4. In the **Email Templates** tab, you can create and modify personal mail templates.



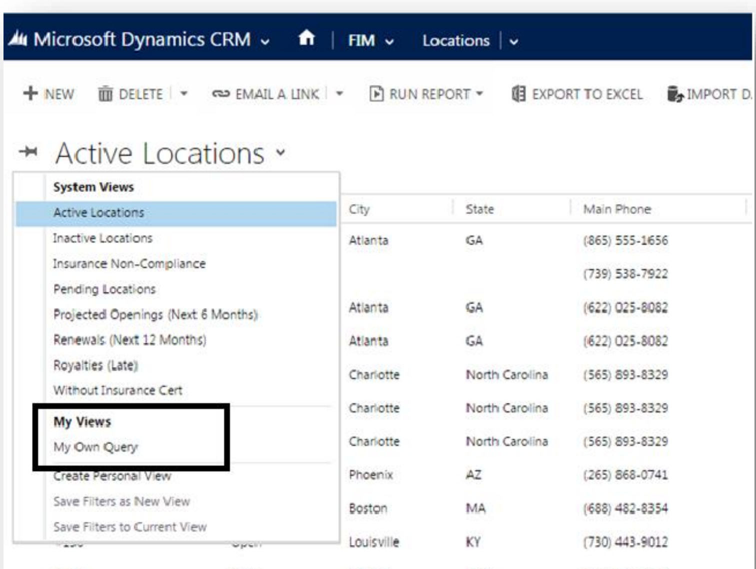
Entity Views

System views are available under each entity of FRM. There are predefined views that you can sort and arrange to suit your needs. You also have the option to create a personal view.

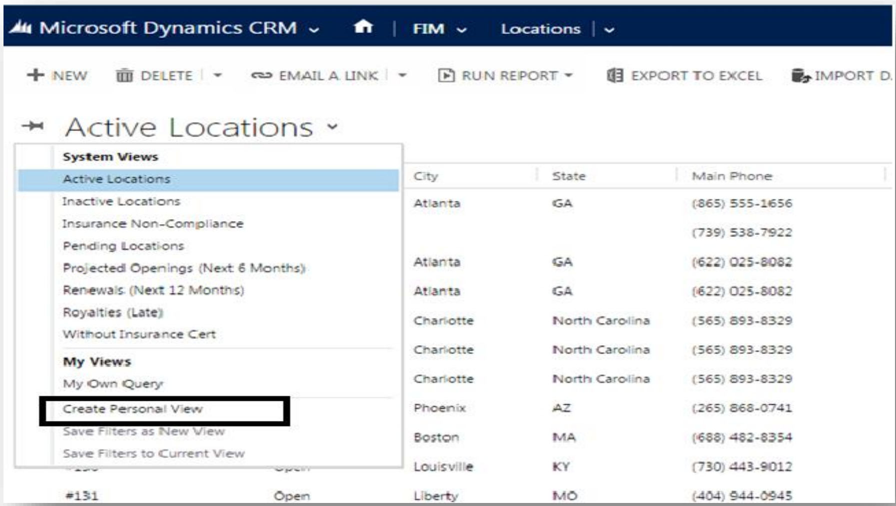
1. Below are examples of entity views under the **Locations** entity of FRM.



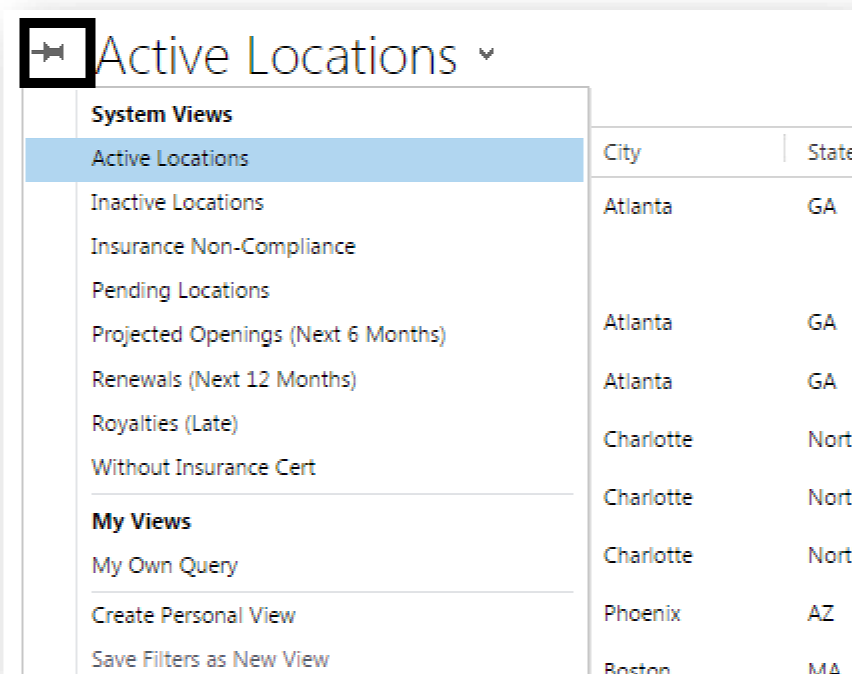
2. In the same drop-down, right under the **System Views**, you can identify your current personal views:



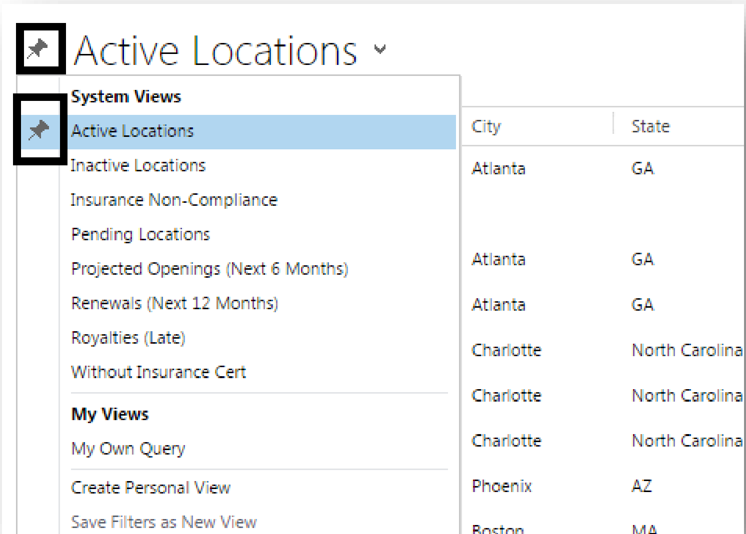
3. In the same drop-down you also have the option to **Create Personal View**, which allows you to create new views (*See Power User guide for more information on creating personal views*):



4. You have the option to change your default view by selecting the view from the drop-down and "pinning it" (click on the icon indicated below):



5. Once the selected view is set as default, the icon will reflect the change by being pinned in a downwards direction indicating it has been set as your current default view:



Searching Entity Records

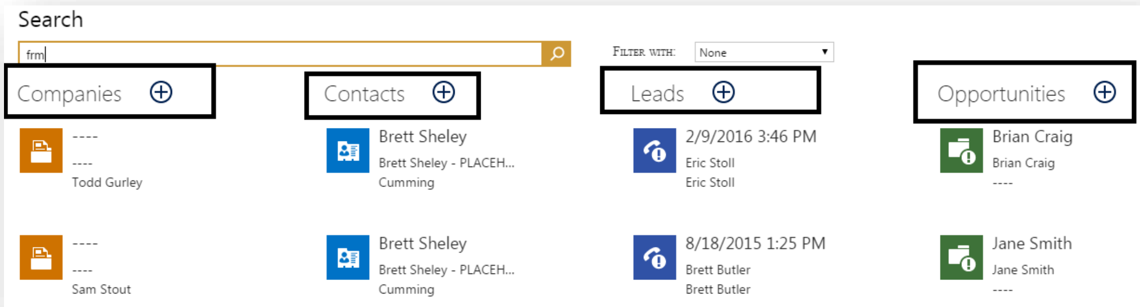
There are 2 search options available in FRM: Global & Entity Search.

- The **Global Search** option will allow you to search all of FRM and provide results from any entity
- The **Entity Search** option will provide results from active entity only.

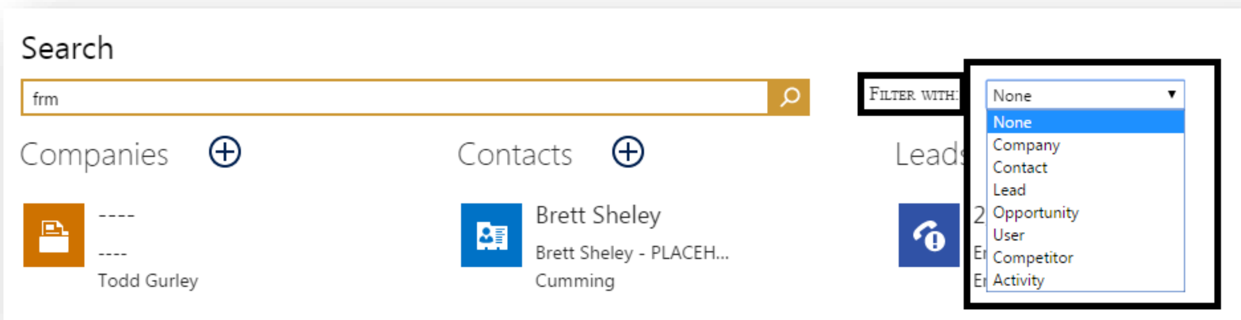
How to use the Global Search option

1. The **Global Search** option is available in right upper side of FRM:

2. The results will reflect every entity with its specific results:

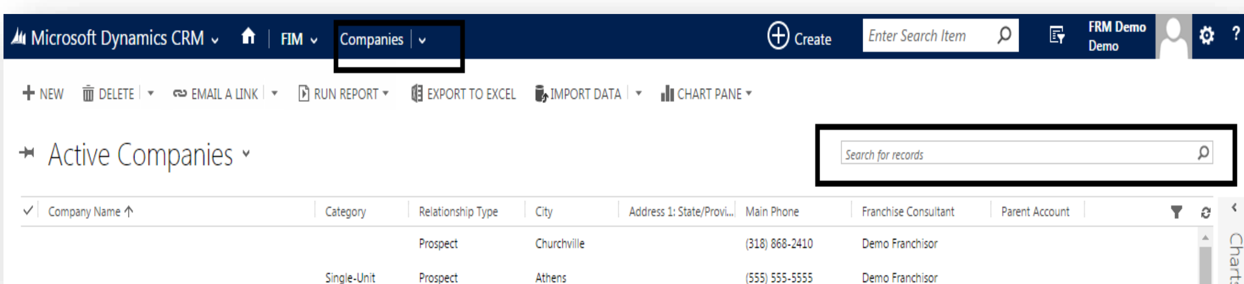


3. You may also utilize the filtering option (**Filter With**) next to the Search bar. Here you can provide the entity preference you would like to limit your search to:

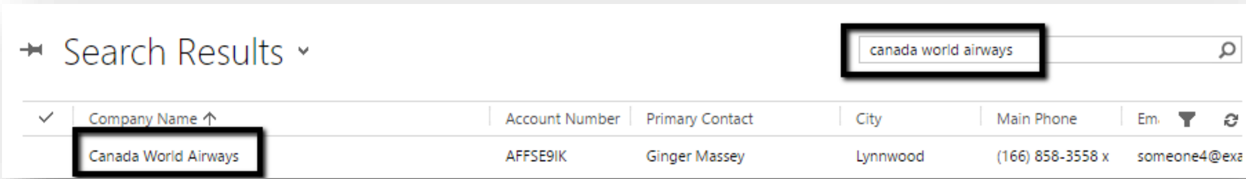


How to use the Entity Search option

1. When in a specific entity you will have the entity search available on the right side of the page below the global search as indicated in the screenshot below:

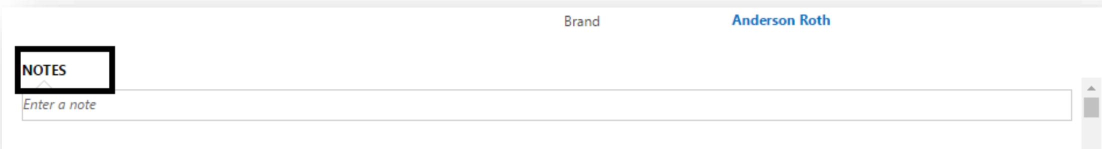


2. The search will only retrieve information from the entity itself; therefore this type of search is limited and specific.

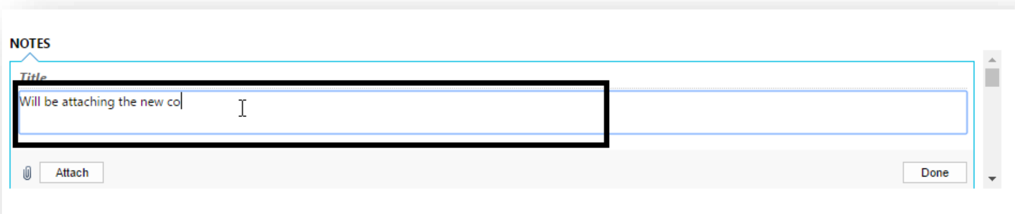


Recording Notes

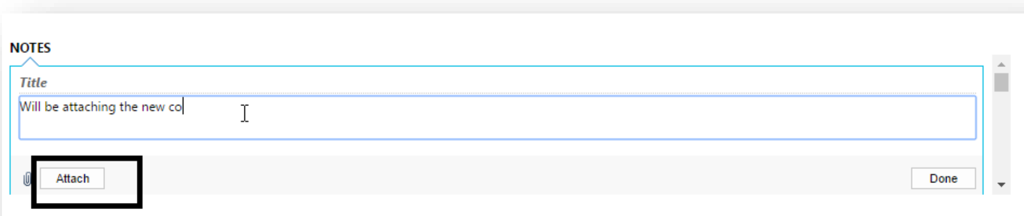
You may add a note to any record that has the Notes widget present.



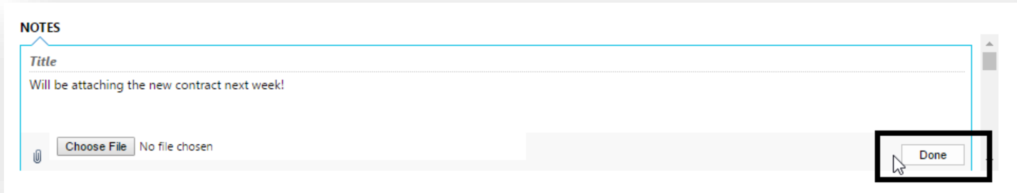
1. Click on the editable message ***Enter a note*** and input the note, as desired:



2. You can also **attach a file** to your note:



3. Click **Done** to save

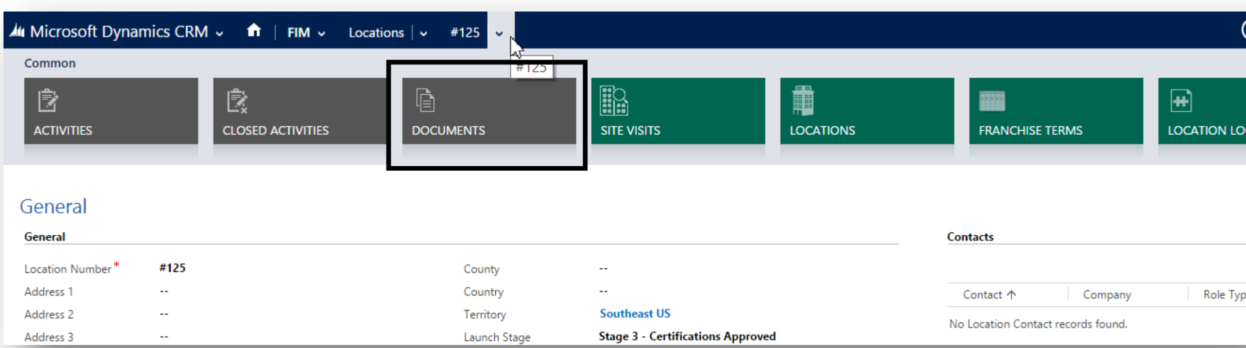


4. If you need to make a change to the message in the note, click on it and you will be given the opportunity to edit.

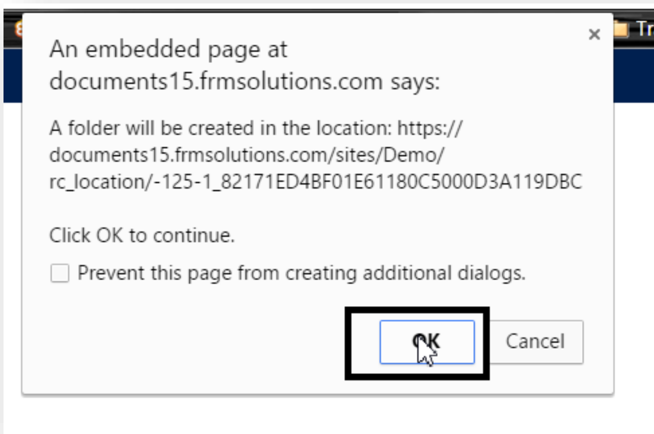
Uploading Documents

FRM allows you to upload documents to any record in FRM (e.g. Locations, Companies and Contacts).

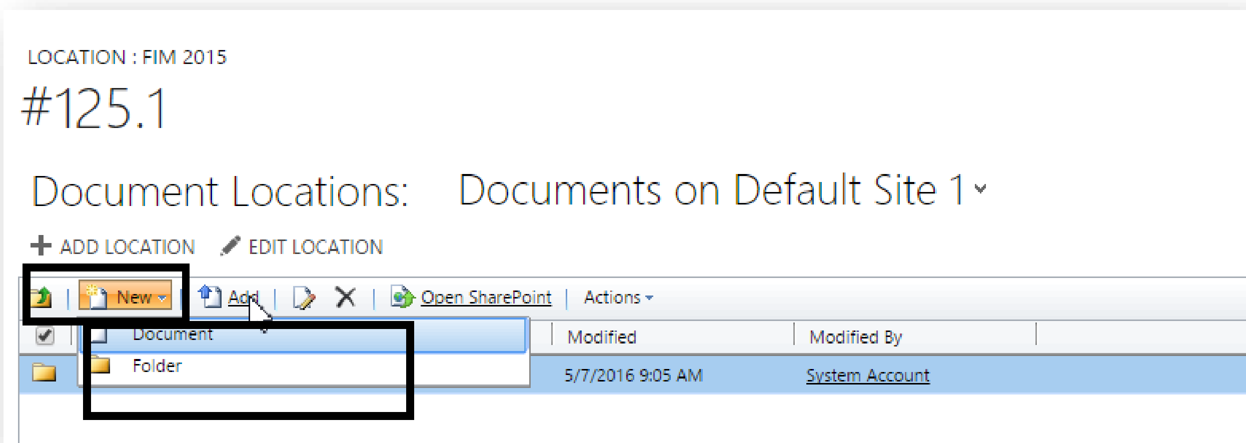
1. Open the record you would like to upload documents to.
2. The active record will be reflected in the ribbon. From the drop-down options, select the **Documents** icon:



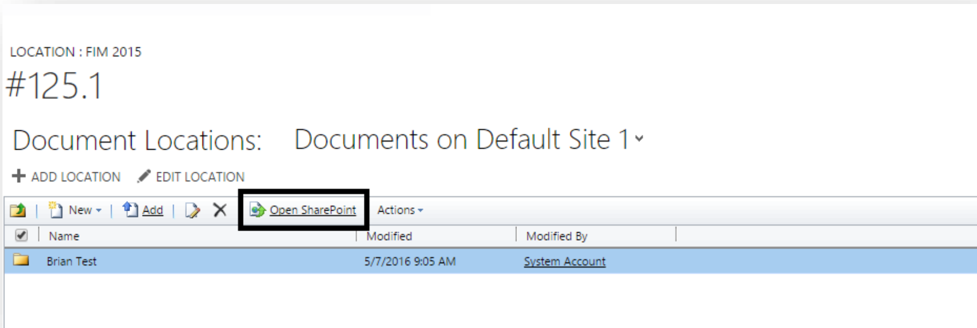
3. The system will create a folder in the record where you can upload the documents.
    a. *Note:* If you are the first user to provision a folder under a specific record you will receive the below pop-up message, informing you that a folder will be created in the location; click **OK** to allow the system to create the folder.



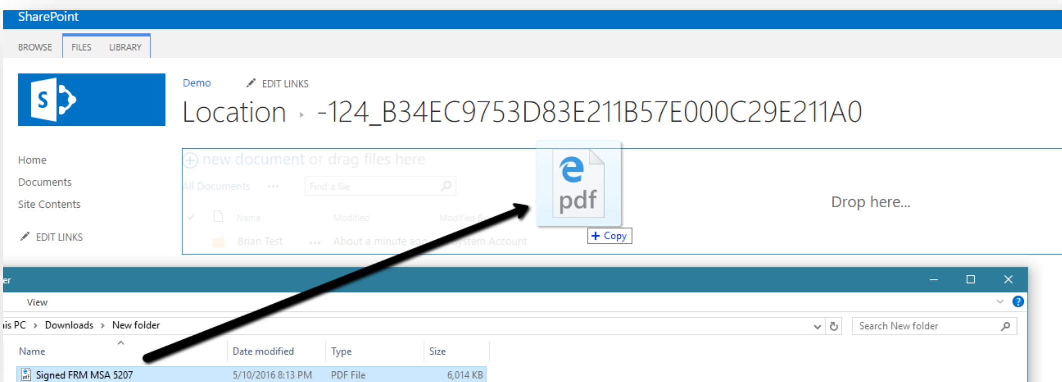
4. Once the folder is created, you have the option to create a new document or folder and to add documents to the record: Click on **New** or **Add** options.



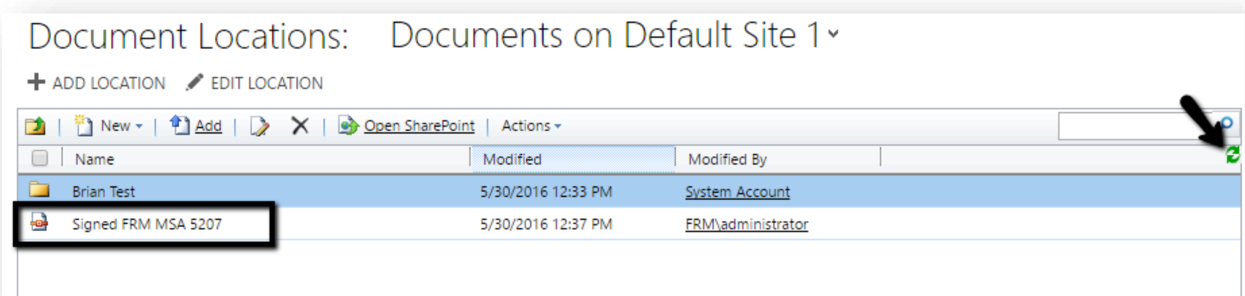
5. To efficiently add multiple documents at once, select the **Open SharePoint** option:



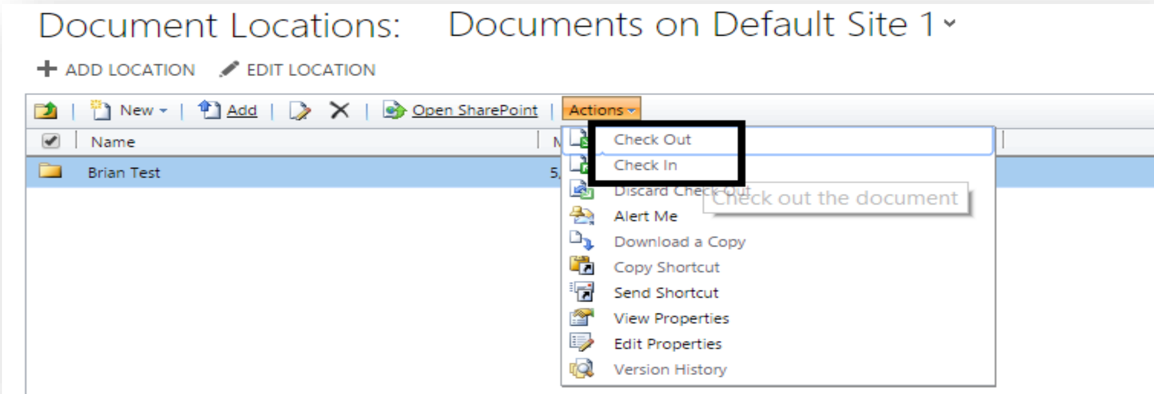
6. This will open a new tab in your browser.
7. Open the folder you would like to move files from and use drag/drop the file or files as indicated below:



8. After hitting refresh they will appear in FRM as indicated below:

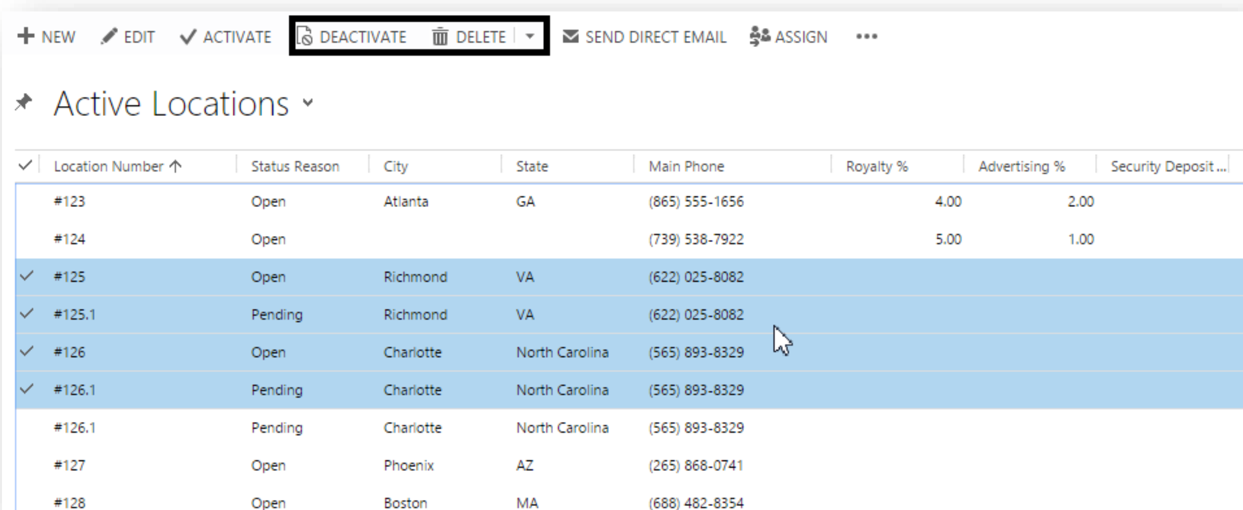


9. If you are editing one of the documents uploaded, you have the options to **Check Out** and **Check In** under **the Action** drop-down:



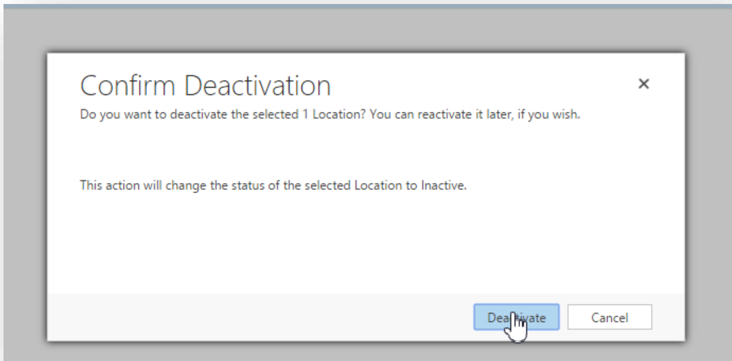
Deactivating Vs. Deleting Records

1. Select the record or records and choose deactivate or delete:



Note: Best practice when it comes to business/customer data would be to deactivate rather than delete. By deactivating, the records will be removed from most views & dashboards but will remain within FRM should you need to refer back to them.

2. Click on **Deactivate** and a pop-up message will inform you of your action and of the possibility to reactivate the record:

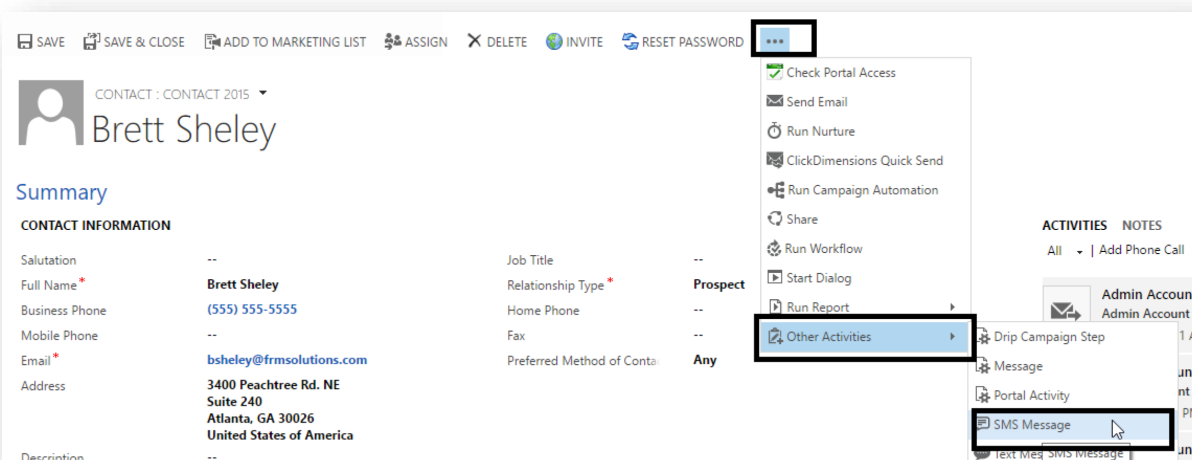


3. If you choose to reactivate the record, go to the Inactive records view, select the record and click the **Activate** option to reverse the change.

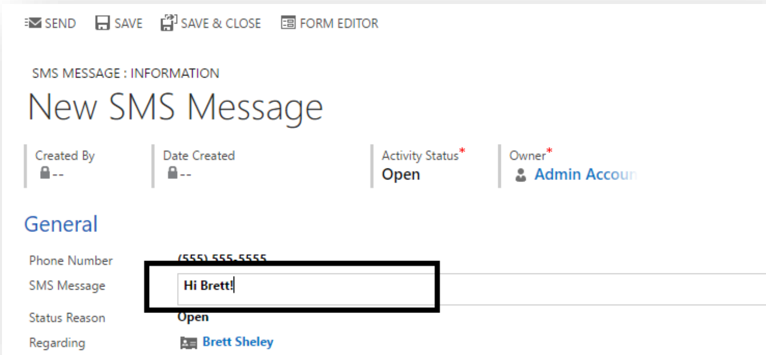
Sending/Receiving Text Messages

FRM possesses the option to send individual text messages to your contacts. Please note that an SMS account must be created with FRM in order to take advantage of this functionality (see your administrator for more details). To send a text message to an individual contact please follow the steps below:

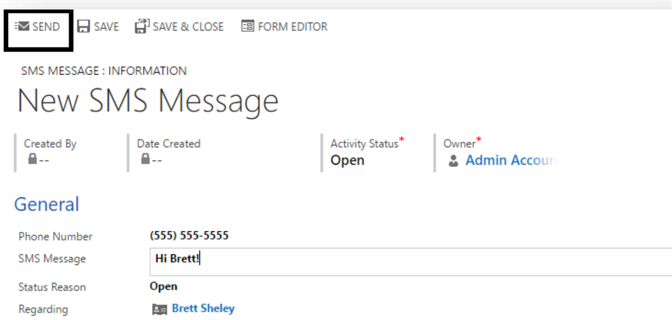
1. Open on the contact you want to send a message to
2. From the contact page, go in the upper right side and from the drop-down select **Other Activities** and then further select **SMS Message**:



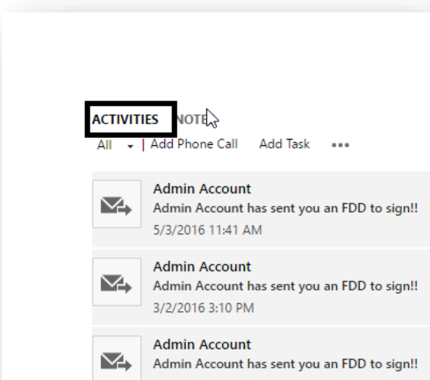
3. In the pop-up window, enter your message for the contact:



4. Click **Send** to have the message sent:



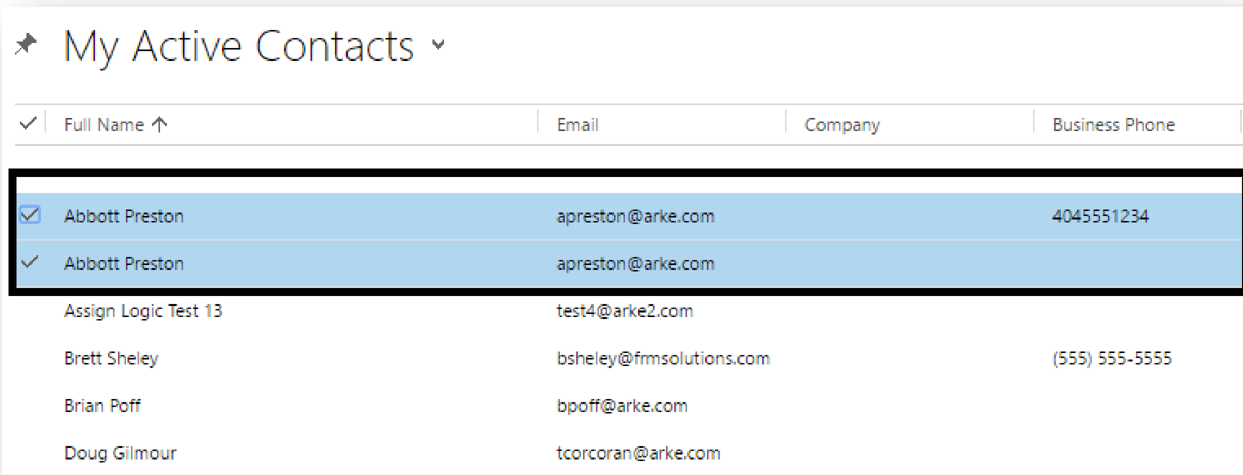
5. You can verify that the message was sent via **Activities** tracker in the right side of the contact page:



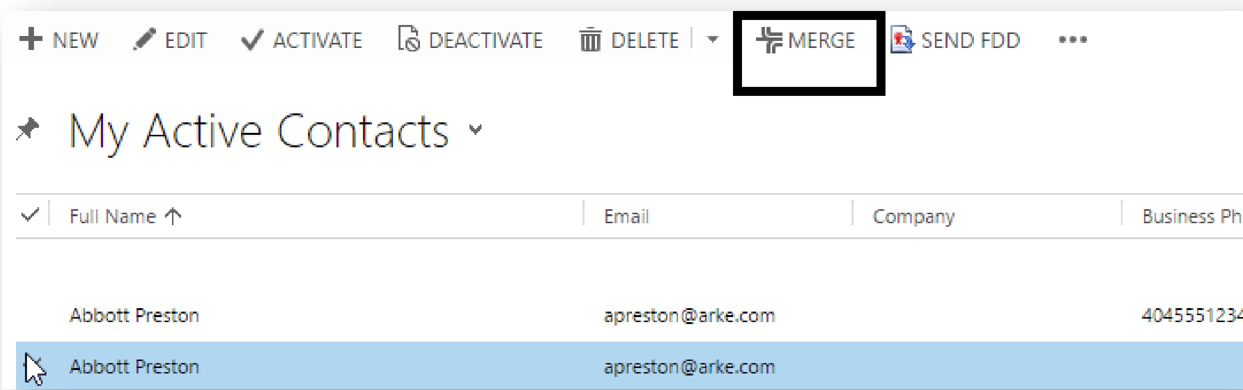
Merging Records

The merging records feature can prove useful if you find yourself in a situation where duplicate records have been created and you would like to compare/merge the records to provide the most accurate picture of data. Please see the below example showing two duplicate contact records:

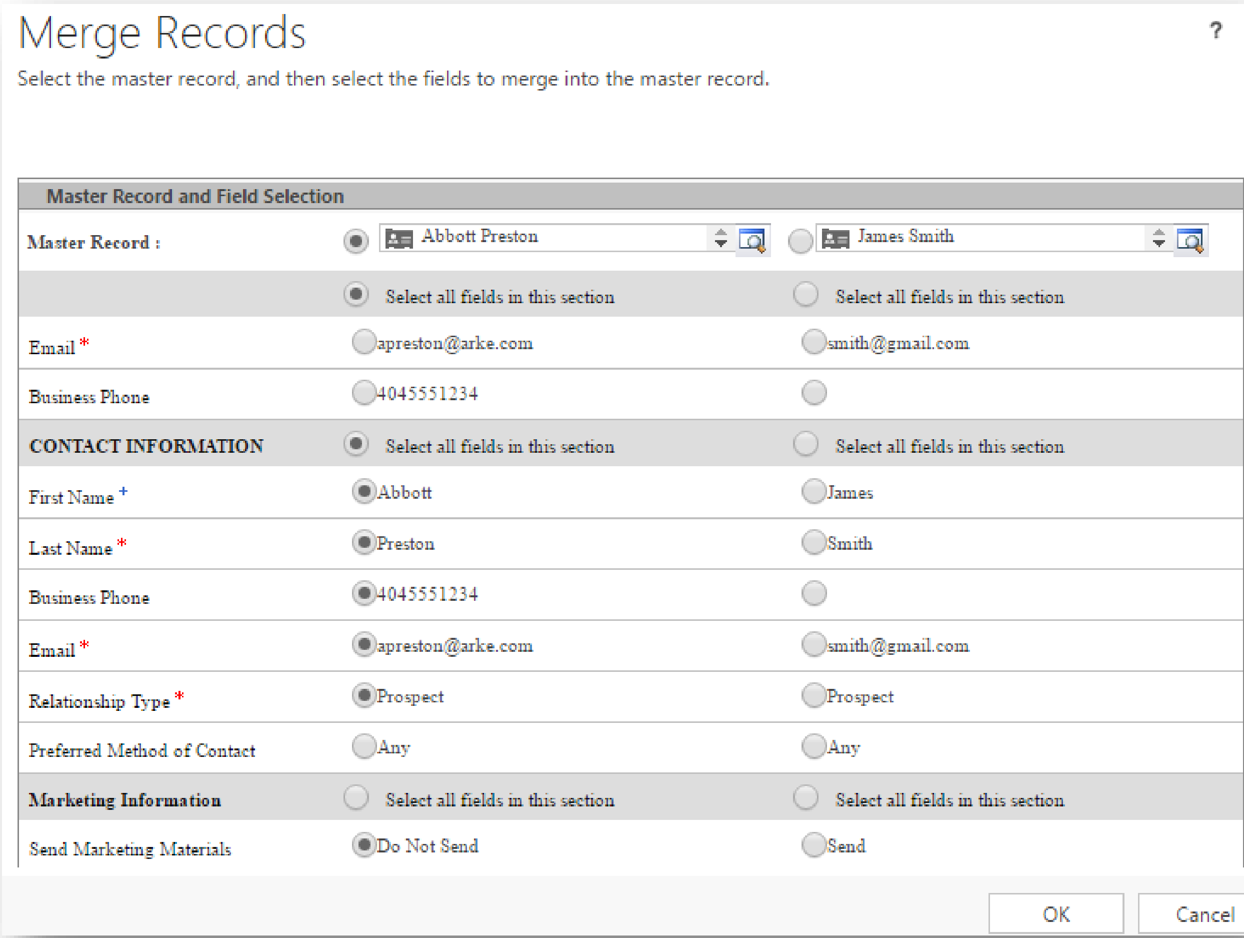
1. Select the contacts that you need to merge:



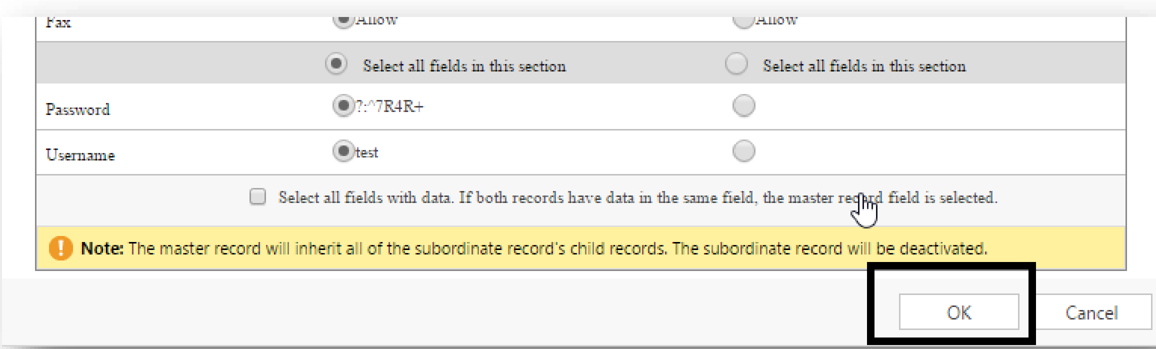
2. Once you have the contacts selected, the **Merge** option will become available for you to select it:



3. In the pop-up window, decide which are the details you want to keep for the merged contact:



4. Click **OK** in the bottom of the window to save the changes:

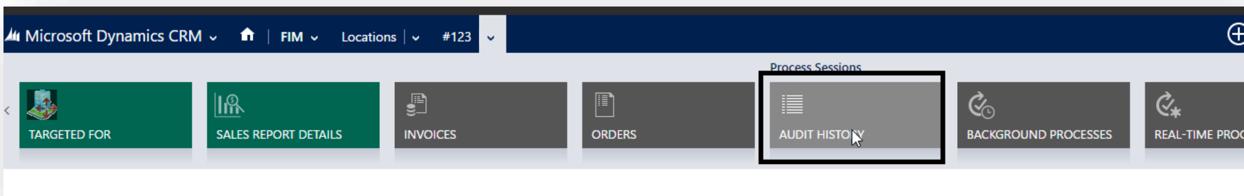


5. You can verify if the change happened by refreshing the contact page, there you will find all the information that you selected.

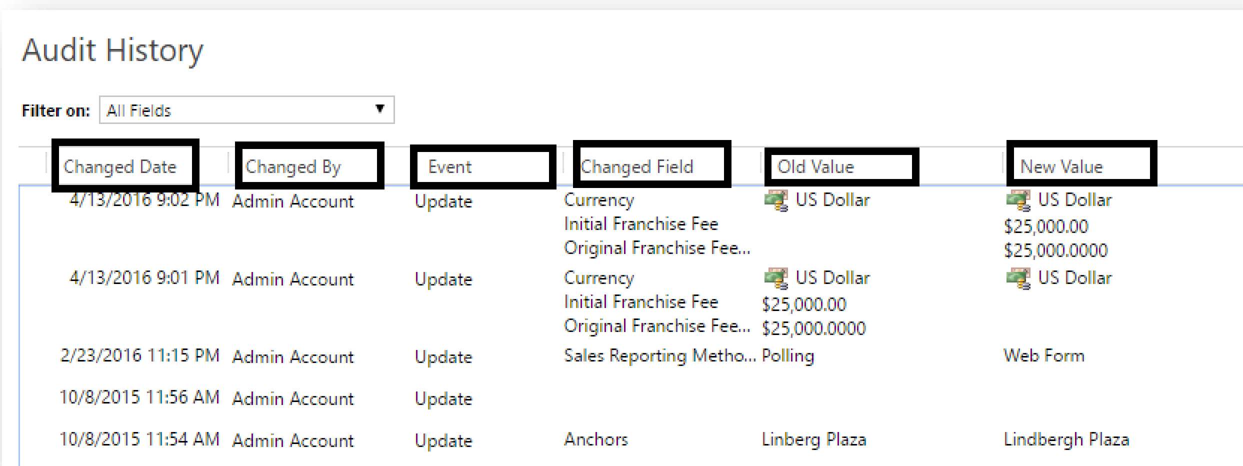
Reviewing Audit History

Every record has an audit trail where you can review all the activities/events that occurred on that specific record. Depending on your security settings you may not have access to the audit history.

1. Under the record you would like to review, activate to the drop-down menu and select **AUDIT HISTORY** icon:



2. You will have access to every change that occurred on this record, providing the opportunity to review new & old values, whom executed the change and when that change occurred:

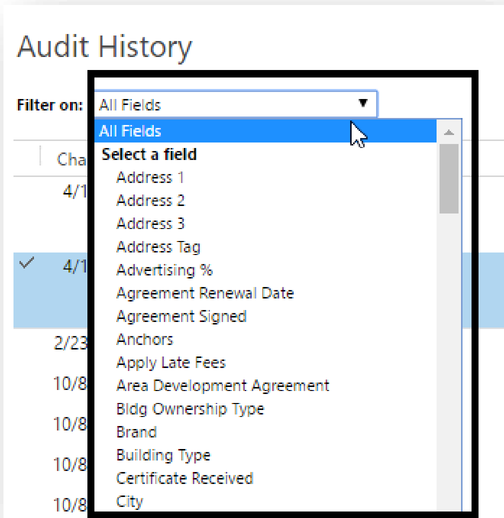


Audit History

Filter on: All Fields

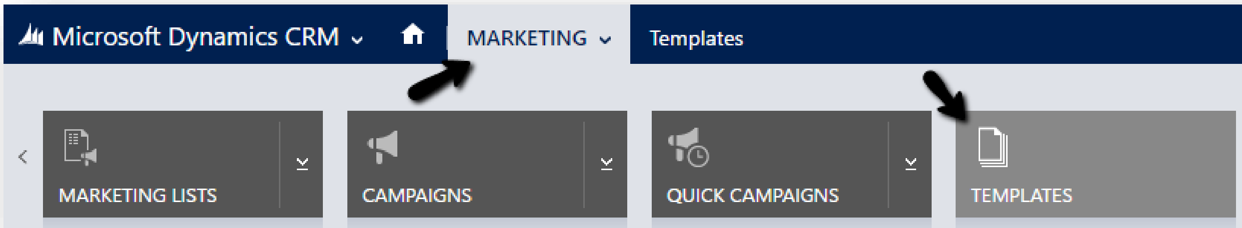
Changed Date	Changed By	Event	Changed Field	Old Value	New Value
4/13/2016 9:02 PM	Admin Account	Update	Currency Initial Franchise Fee Original Franchise Fee...	US Dollar	US Dollar $25,000.00 $25,000.0000
4/13/2016 9:01 PM	Admin Account	Update	Currency Initial Franchise Fee Original Franchise Fee...	US Dollar $25,000.00 $25,000.0000	US Dollar
2/23/2016 11:15 PM	Admin Account	Update	Sales Reporting Metho...	Polling	Web Form
10/8/2015 11:56 AM	Admin Account	Update			
10/8/2015 11:54 AM	Admin Account	Update	Anchors	Linberg Plaza	Lindbergh Plaza

3. For records with a long audit history or if you are interested in changes only related to a specific field you may filter the audit results by selecting from the Filter on drop-down:

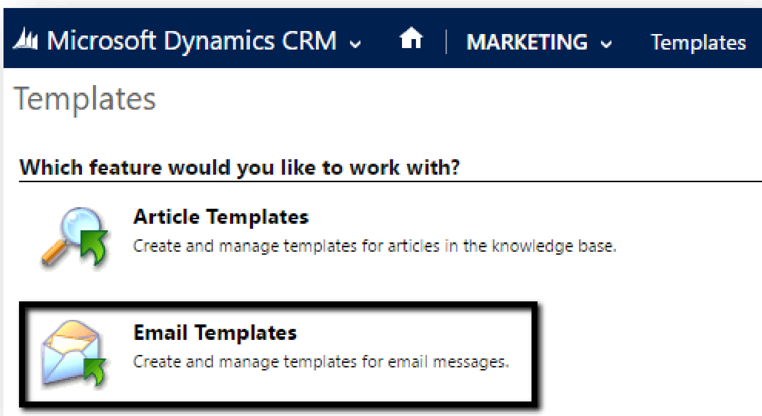


Creating Email Templates

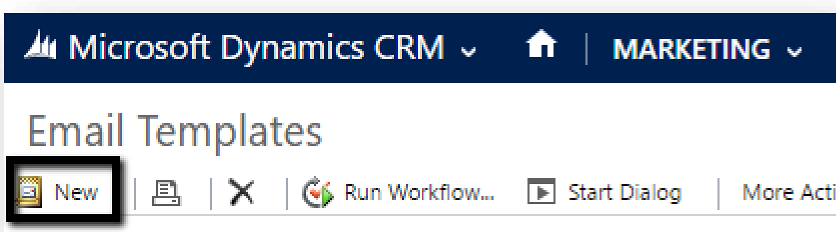
1. Navigate to Marketing > Templates in the FRM ribbon



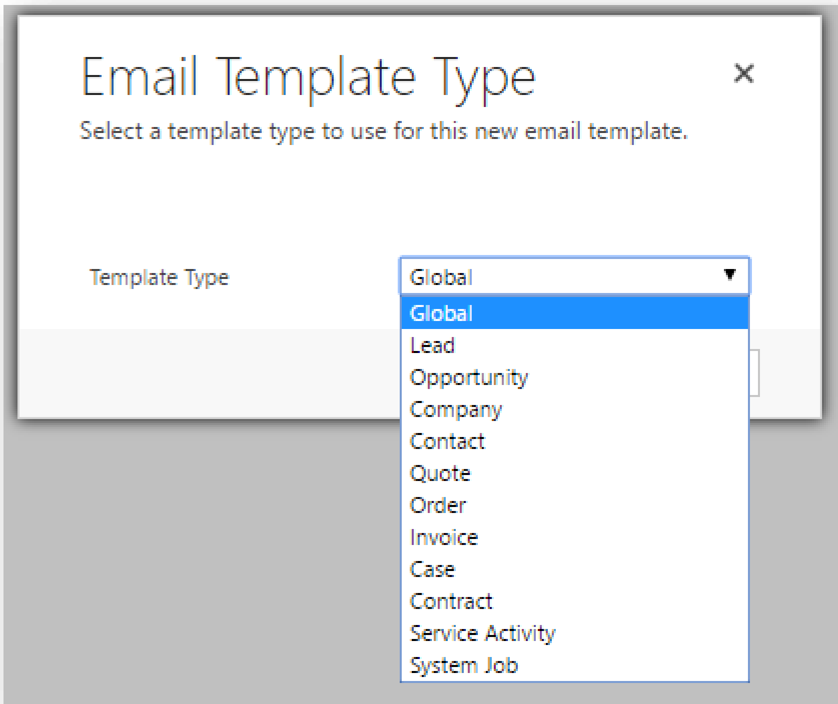
2. Select **Email Templates**



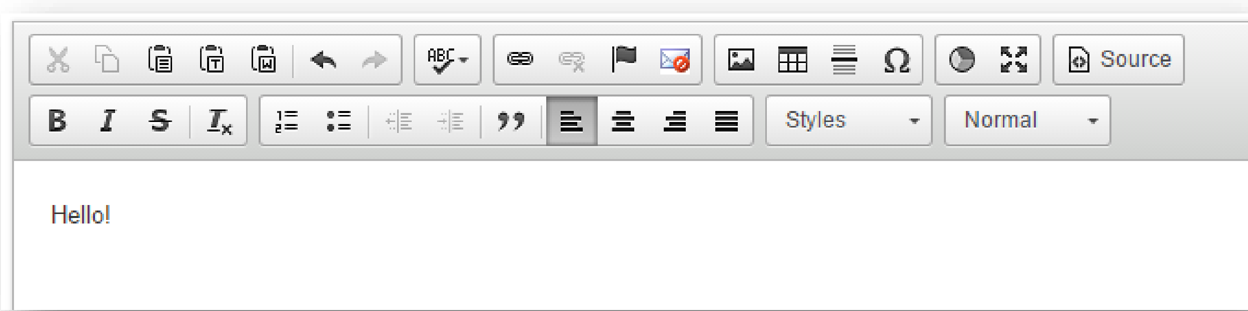
3. Select **New**



4. Select **Template Type** from the drop-down. You may create a global template or a template for the entities in the drop-down. Please not that if you select a **Global** template type you will not be able to automatically populate FRM data into your email (i.e. Lead – First Name). Once you have chosen your entity click **OK**.



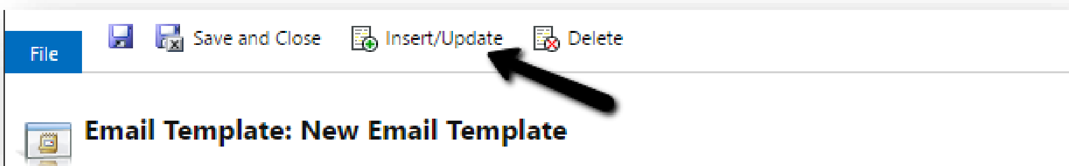
5. Provide a **Title** and **Subject** for your email. Please note that the title in not customer-facing and only used for differentiating between your email templates within FRM.
6. Proceed to complete your email in the editor indicated below:



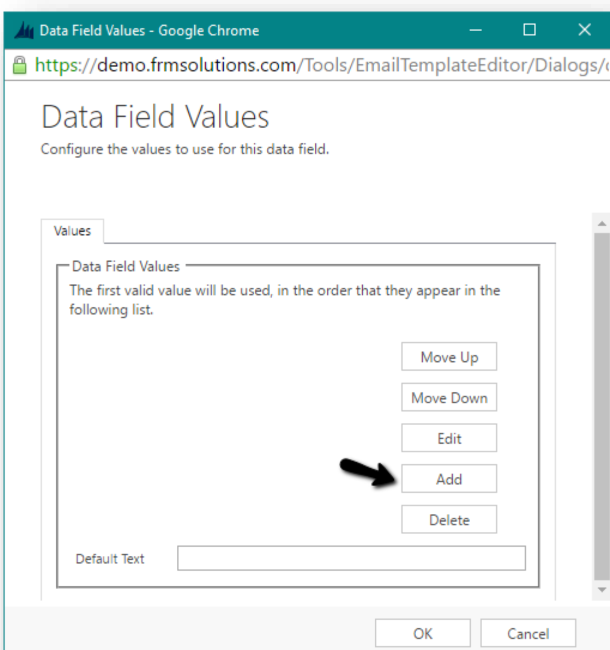
This editor will accept HTML by selecting the **Source** button in the screenshot above.

7. If you selected a template type other than **Global** you have the ability to inject data from the FRM record directly into the email automatically. In the following example, we will use a template type **Lead** and inject the Lead's first name into our email.
8. Place the cursor in your editor precisely where you would like the lead's first name to appear. In this example we want the name to follow immediately after "Hello".

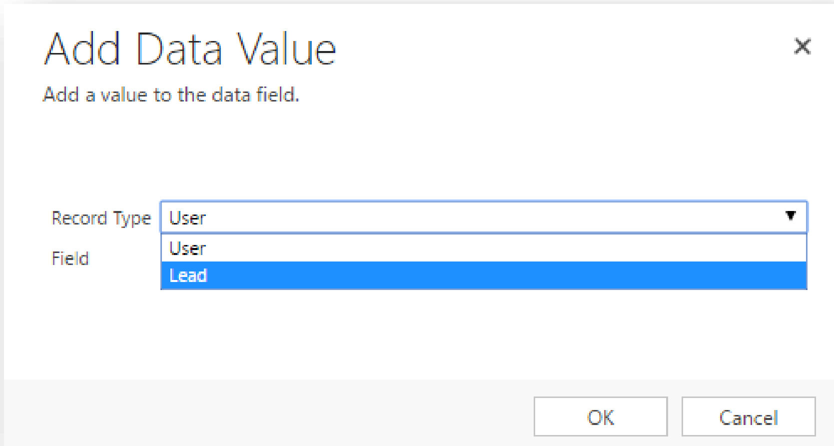
9. Select **Insert/Update** from the options at the top of your window



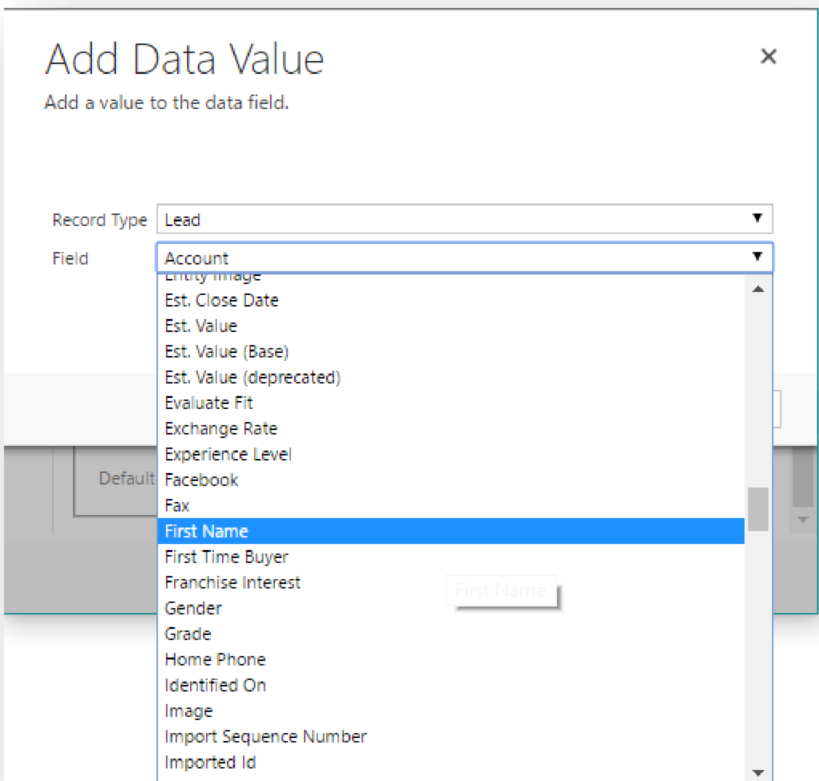
10. A Pop-up window will appear. Select **Add**



11. Select the record type (in our case a Lead)

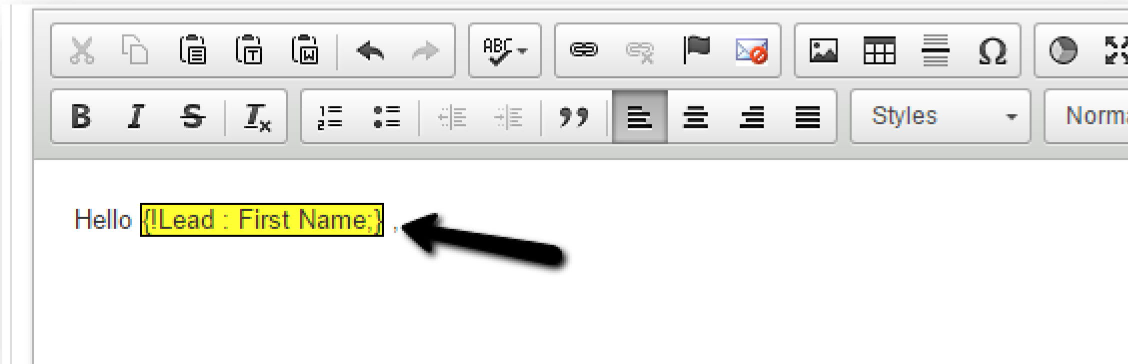


12. Select the field you would like to add (First name) then click OK

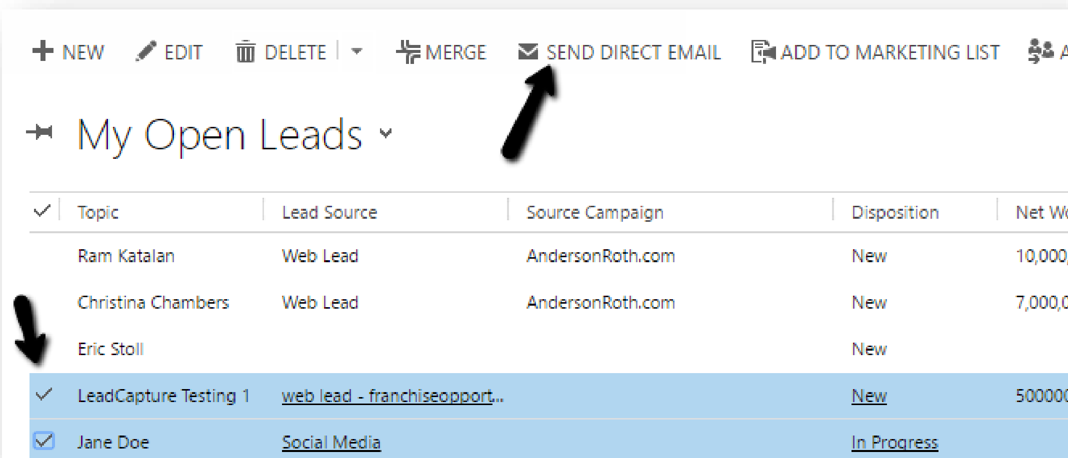


13. Click OK

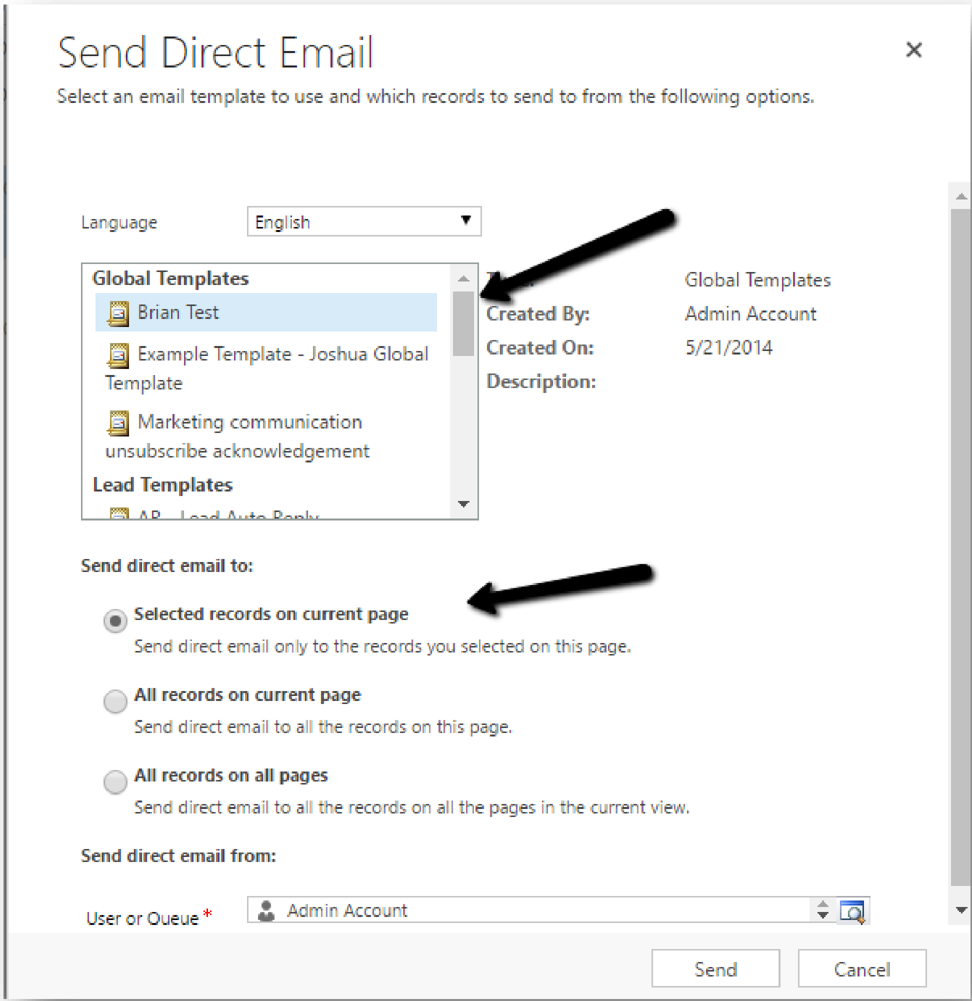
14. You will notice text highlighted in yellow was added to your email template. This is the data that will be dynamically populate based on whom you send the email to each time you use this template.



15. Once you have completed the rest of your email select **Save and Close** from the options at the top of your window
16. This template may be used in drip campaigns, workflows & campaigns. It may be also sent to an individual or multiple individuals by selecting them and clicking **Send Direct Email**



17. After clicking **Send Direct Email** your will be prompted to choose your template from a list of global templates and also those related the record type you are sending the email to (i.e. Lead)

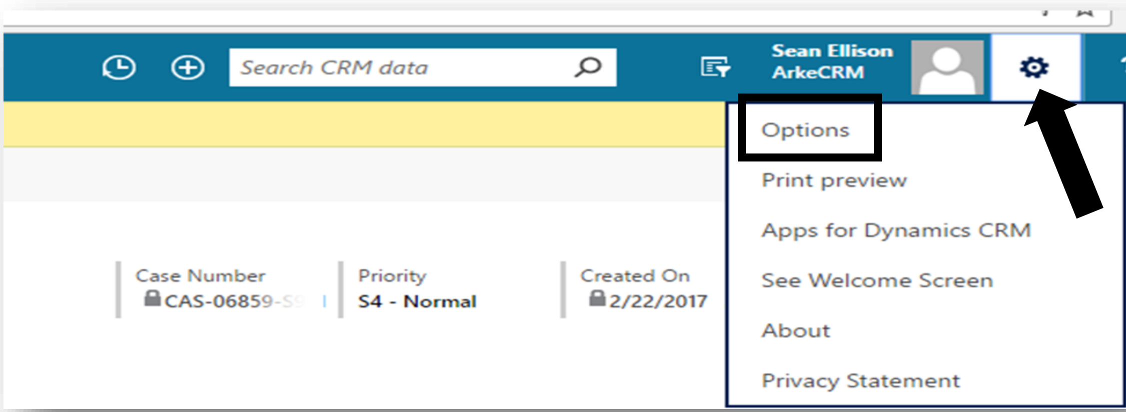


Also note, that from this window you can choose to send the email to the records you selected OR you have the option to send to all on the current page OR all in the current view.

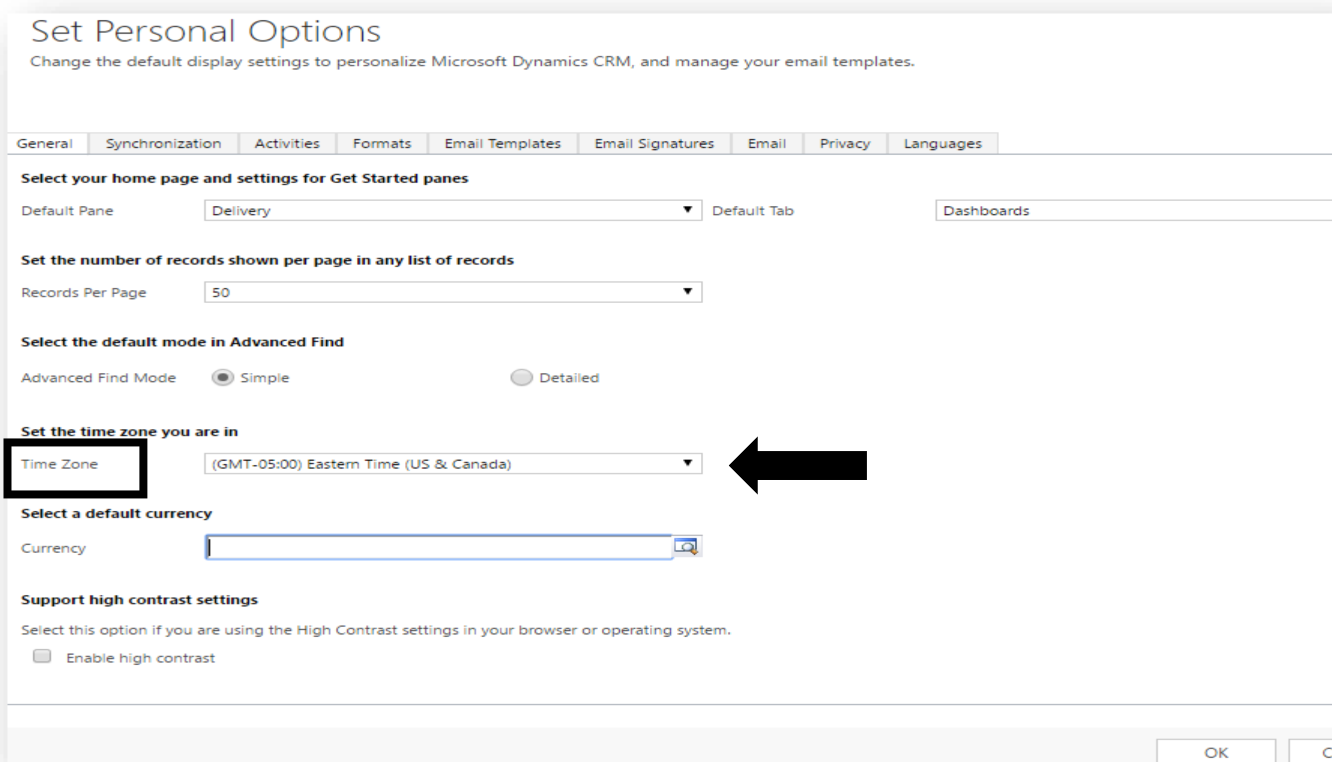
18. Select **Send**

Adjusting the Time Zone Setting

1. After logging into your account, select the gear in the upper right hand corner next to your profile picture and select "Options".



2. Once the "Set Personal Options" window appears, select the correct time zone from the "TimeZone" drop down and click "OK". Now, log out of your account, then log back in to apply the changes.

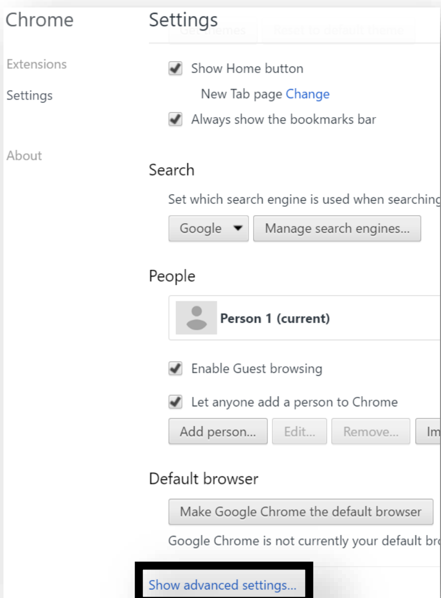


Removing FRM Cookies from your Browser

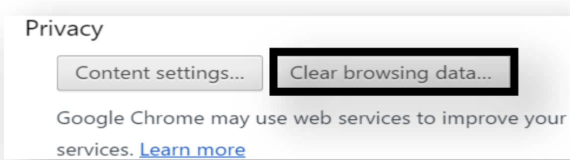
When attempting to sign into the FRM Portal, the screen will flash and not advance, leaving you on the log on page. To remedy this issue, the cookies in your browser must be deleted. To do so, follow the instruction listed below:

For Chrome:

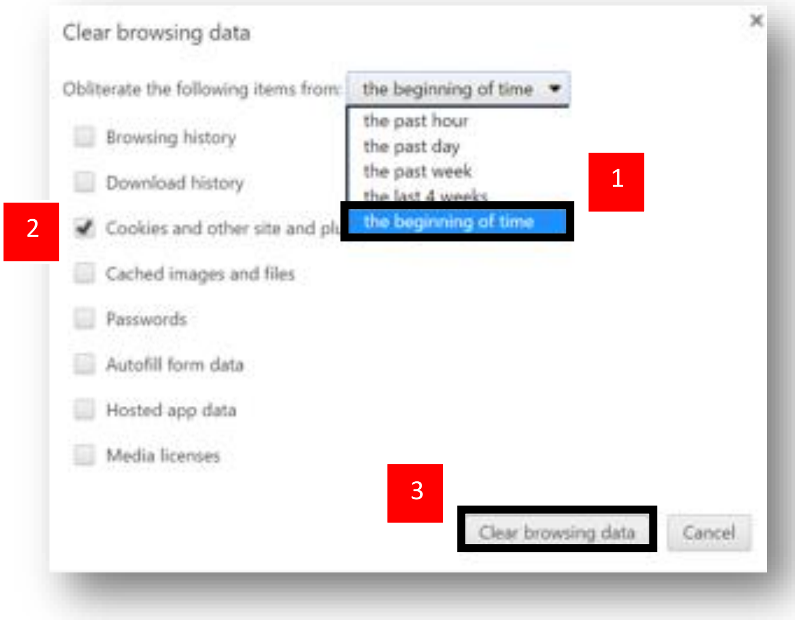
1. Click on the vertical ellipsis symbol  in the upper right hand corner and select settings. This will open the "Settings Page" in a new tab.
2. Now that you are on the "Settings Page" scroll down and select "Show advanced settings..."



3. Find the "Privacy" heading and click the "Clear browsing data..." box.



4. In the “Clear browsing data” window, click the dropdown in the box next to “Obliterate the following items from” and select **(1) “**the beginning of time”. Now, check the box next to **(2)** “Cookies and other site plugin data”, then click the **(3)** “Clear browsing data” box.

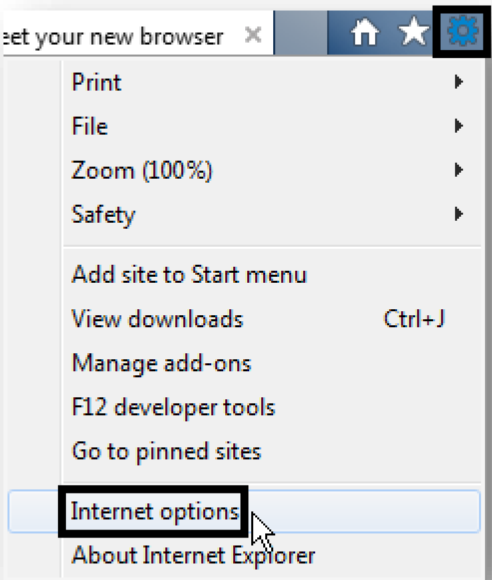


5. Finally, close the “Settings” tab and you will now be able to sing into the FRM Portal.

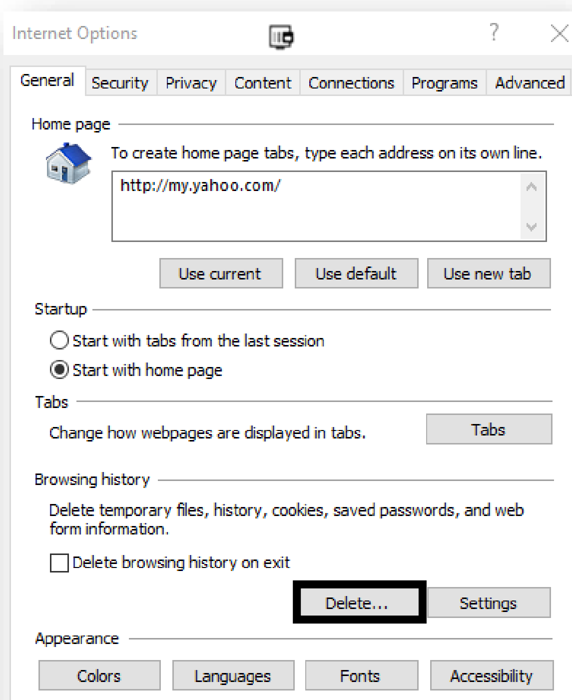
Please see the following pages for instructions regarding Internet Explorer, Edge and Firefox.

For Internet Explorer:

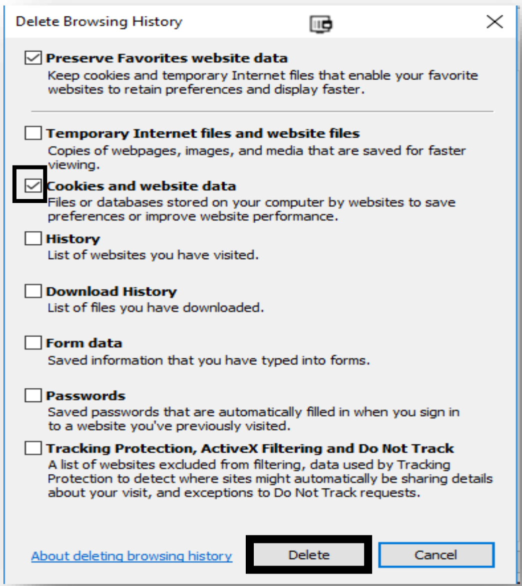
1. Click on the "gear" icon in the top right corner, and select "Internet options".



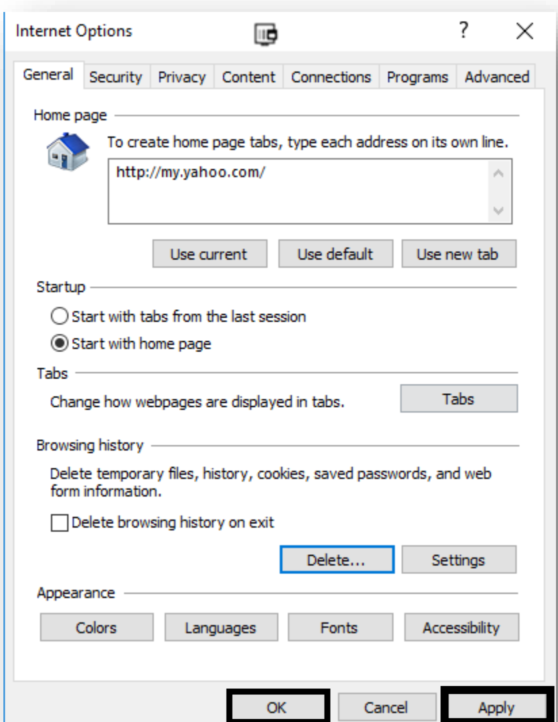
2. On the "Internet Options" window, under the "General" tab, find "Browsing History" and click on "Delete…".



3. In the “Delete Browsing History” window, check the box next to “Cookies and website data” and select “Delete”.

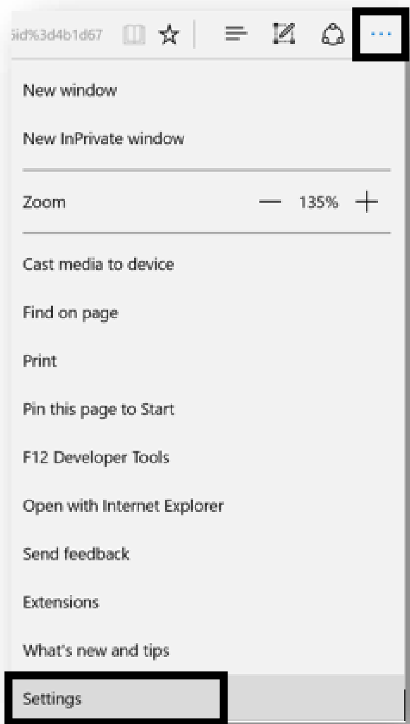


4. Finally, select “Apply” then “OK” on the “Internet Options” window and log into the FRM Portal as usual.

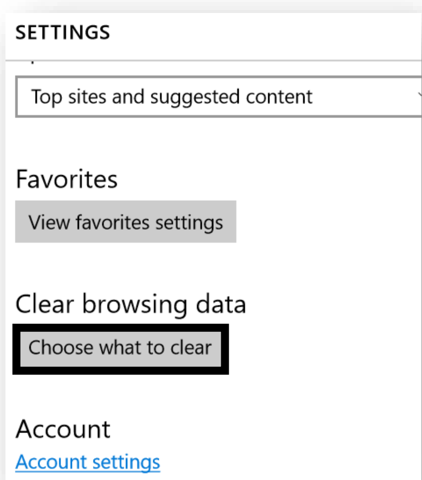


For Edge:

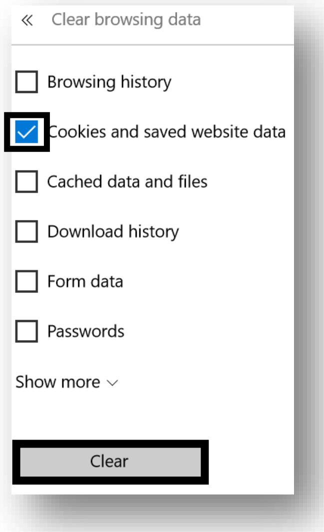
1. Click on the ellipsis symbol in the upper right hand corner and select settings.



2. In the “Settings” window, scroll down and select “Choose what to clear” under the “Clear browsing data” heading.



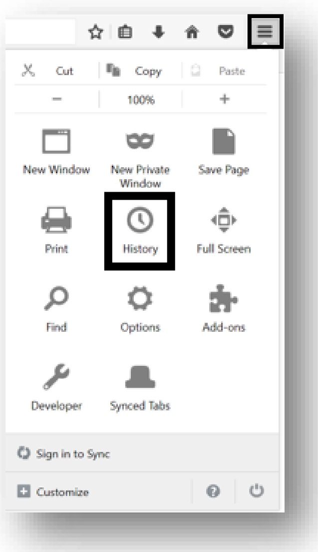
3. When the “Clear browsing data” window appears, check the box next to “Cookies and saved website data” and select “Clear”.



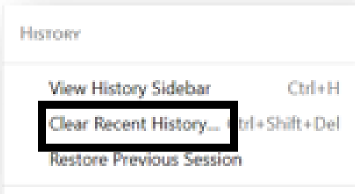
4. Once again, click on the ellipsis in the upper right hand corner and log into the FRM Portal as usual.

For Firefox:

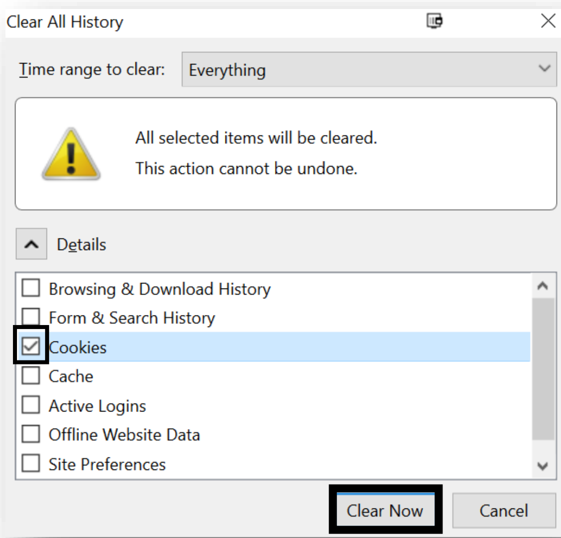
1. Select the “Open Menu” symbol ≡ in the upper right hand corner and click on “History”.



2. On the “History” tab select “Clear Recent History…”.



5. In the “Clear All History” window check the box next to “Cookies” then click on “Clear Now”.



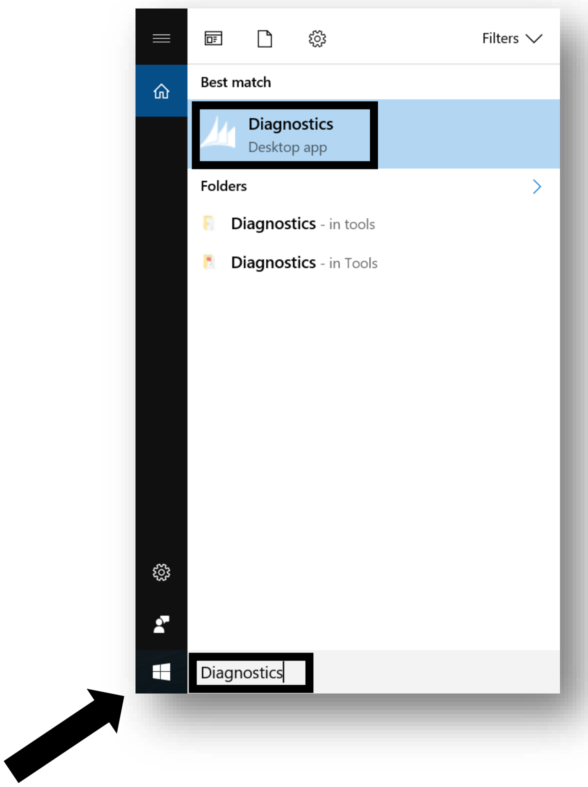
6. Lastly, close the “Options” tab and log into the FRM Portal as usual.

Stopping Sync of Contacts from FRM to Outlook

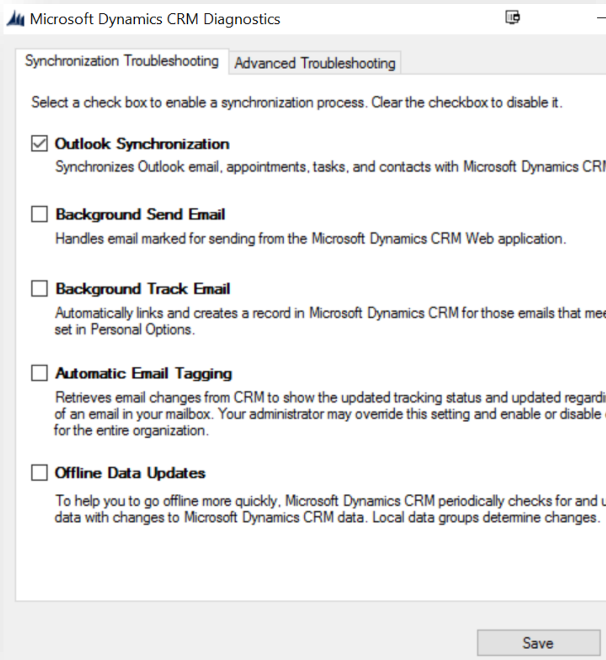
The following steps will disable the filters that are designed to populate contacts in a user's Outlook. After the entire process is complete, you must return to these steps to turn the synchronization back on once the "Contact" filter has been disabled.

Step 1: Stop CRM to Outlook Synch

1. Select the Windows icon in the bottom left hand corner of the screen, type the word "Diagnostics" and select the "Diagnostics" desktop app from the top of the list.

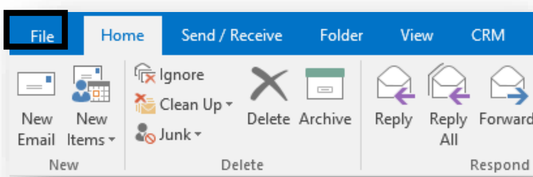


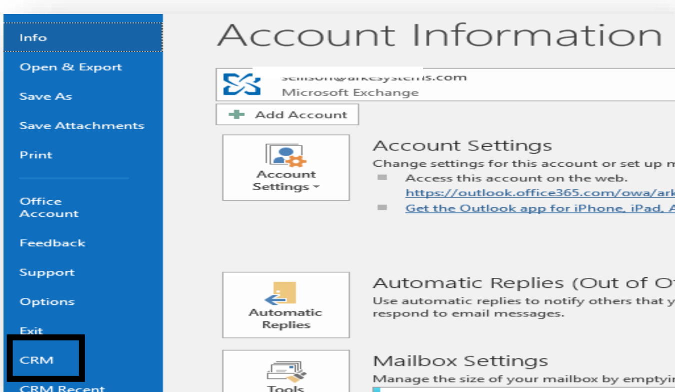
2. In the Microsoft Dynamics CRM Diagnostic Window that appears, you will need to uncheck the box next to "Outlook Synchronization" and click "Save".



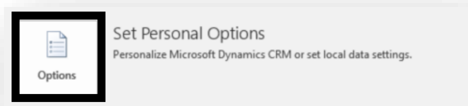
Step 2: Disable The Outlook Contact Filter

1. In Outlook, select “File” in the top left corner. When the “Account Information” page is displayed, select “CRM” (if CRM is not listed, select Menu then CRM will appear).

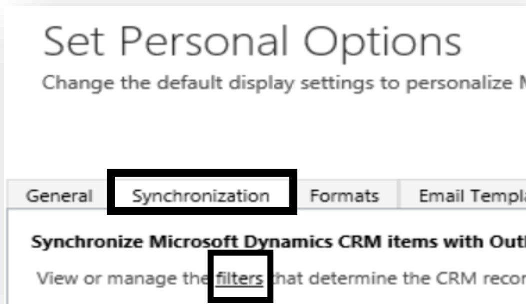




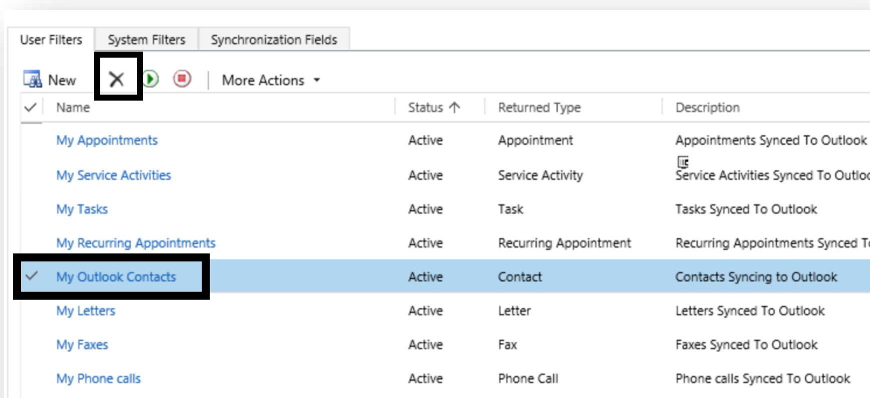
2. On the newly populated screen, double click the "Options" box.



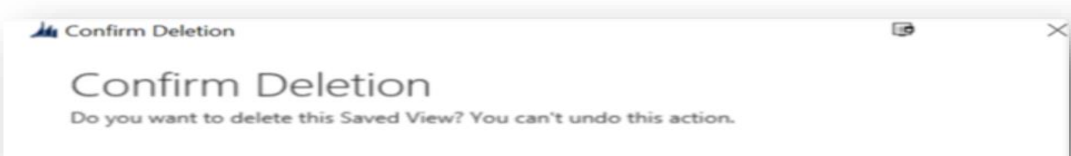
3. Now that the "Set Personal Options" window is available, select the "Synchronization" tab, and double click on the underlined word "filters".



4. It is now time to stop the contact synchronization. Check the box next to "My Outlook Contacts" click on the delete (X) button in the toolbar.



A "Confirm Deletion" warning should appear. Close this warning, or select "Delete" if available, and proceed to Step 3.

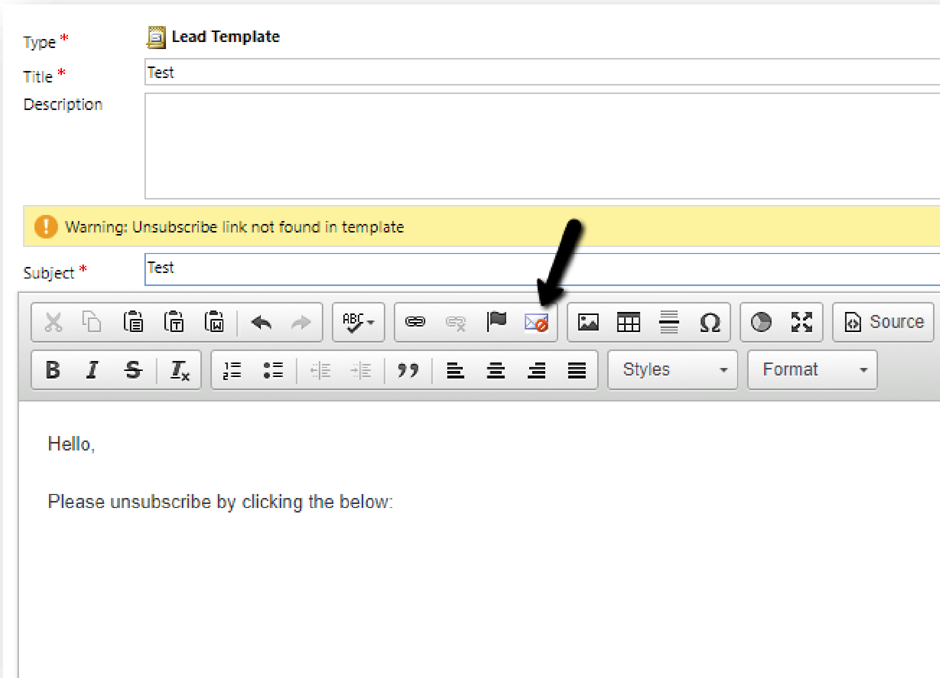


STEP 3: Re-Enable Outlook Synchronization In Diagnostics

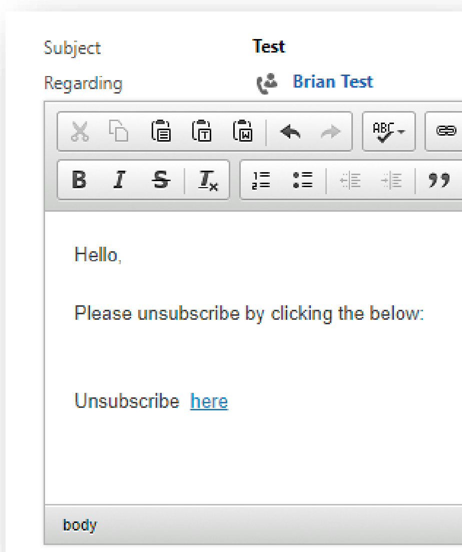
To make sure the CRM activities synchronize with Outlook, you must enable the “Outlook Synchronization” in “Diagnostics”. To do so, follow the instructions in **Step 1**, but this time you must **check the box next to “Outlook Synchronization”.**

Adding Unsubscribe Link to an Email Template

1. Position your cursor where you would like the unsubscribe link to be and select the button indicated in the screenshot below:

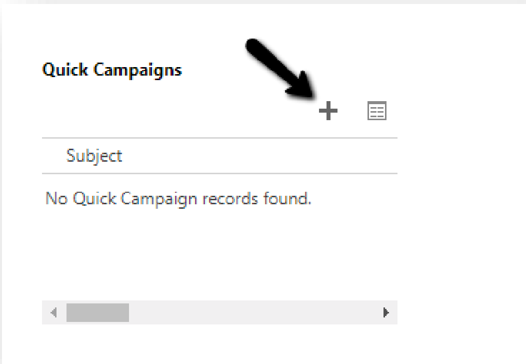


2. The end result will look something like the below:

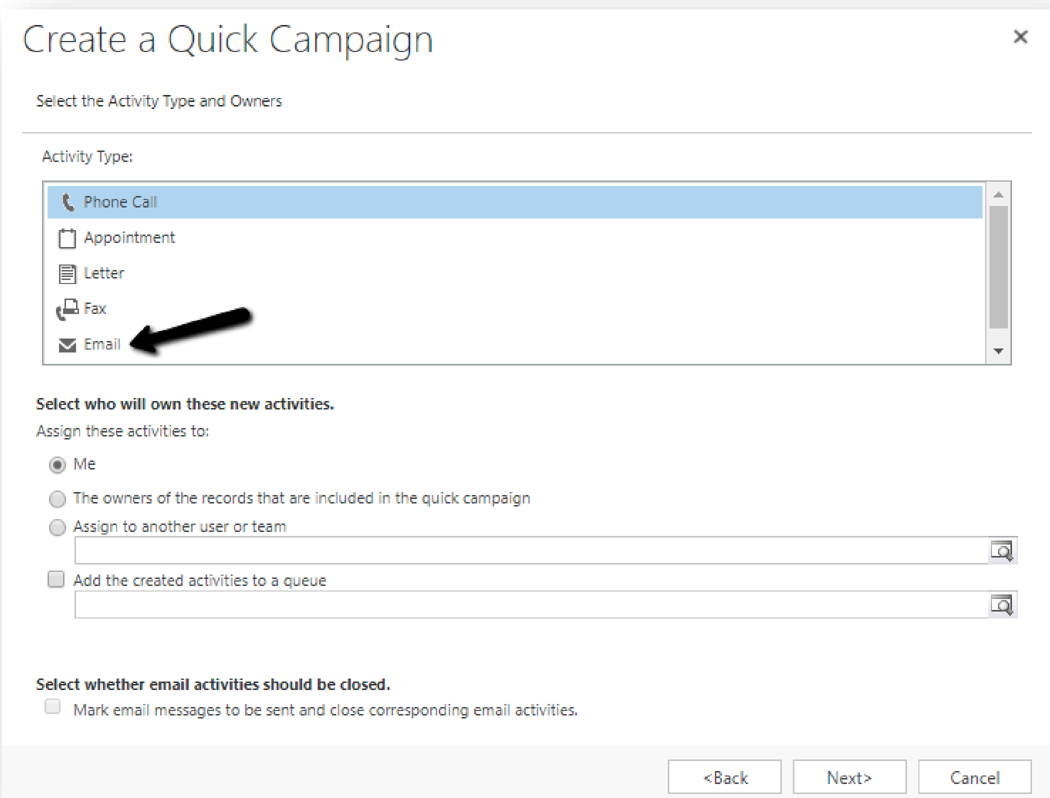


Sending Email Quick Campaigns to a Marketing List

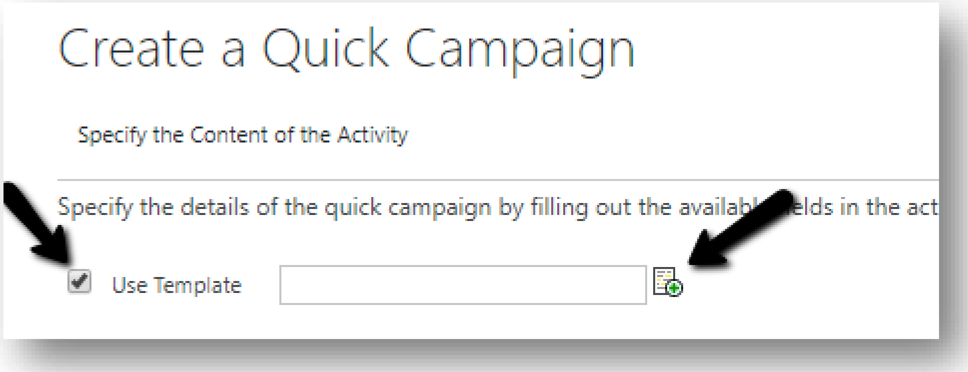
1. Open the marketing list you would like to send the email; select Quick Campaigns in the bottom-right area of the form.



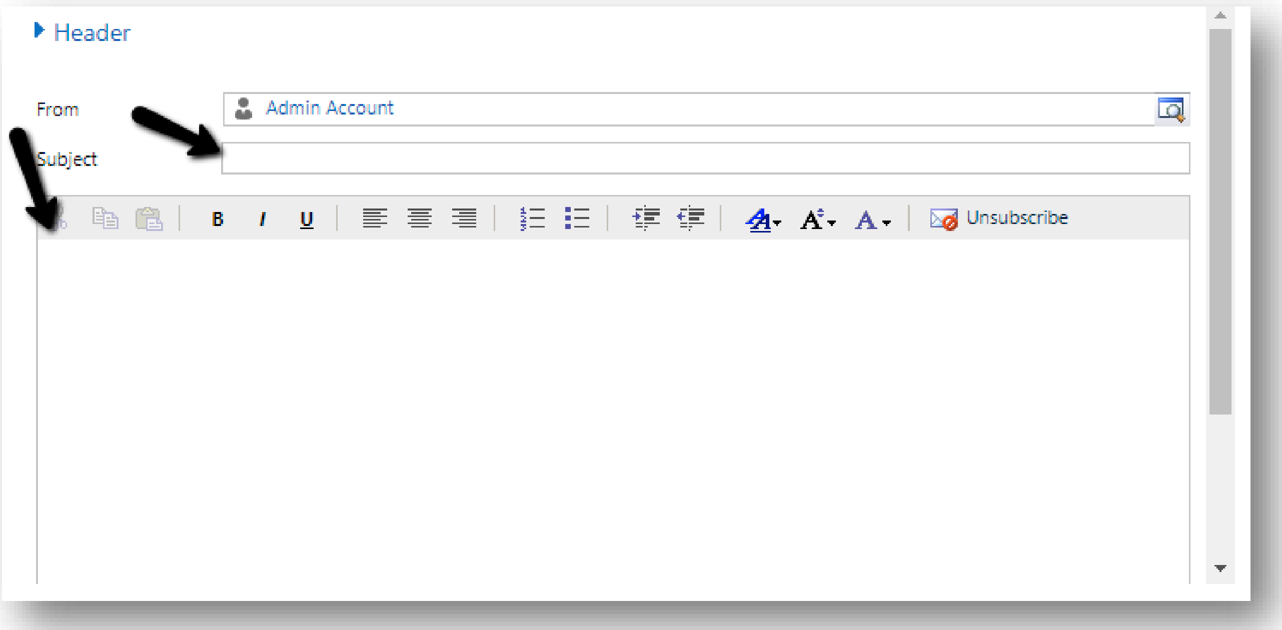
2. Click Next
3. Name Campaign
4. Determine Activity Type



5. If you are sending an email template check the box indicated above and select your template

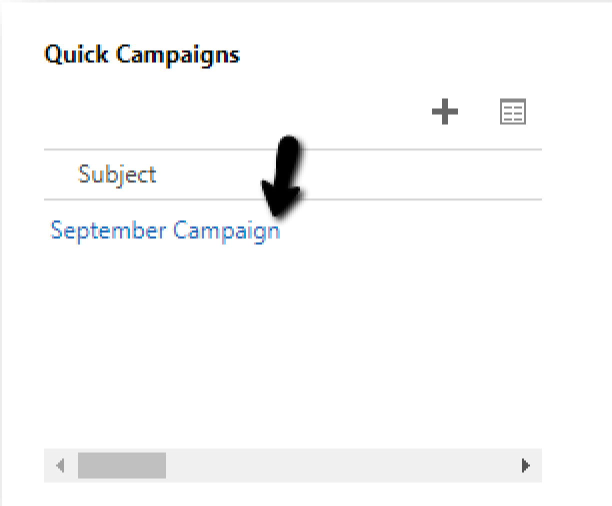


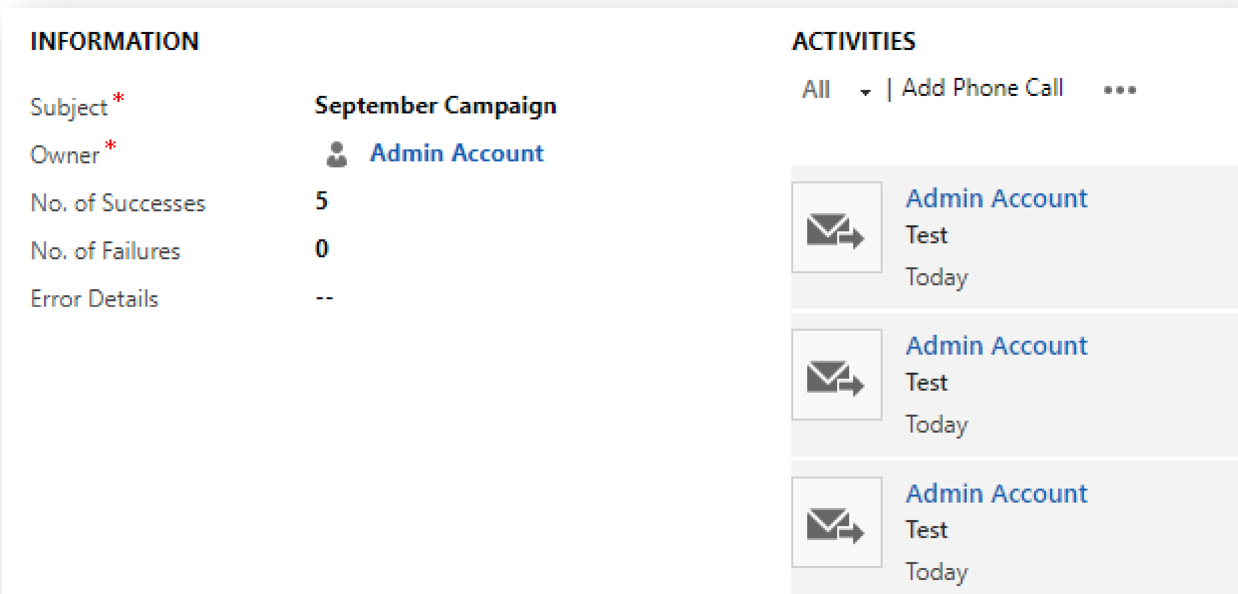
6. If you are not sending a template create your email below:



7. Click Next
8. Click Create

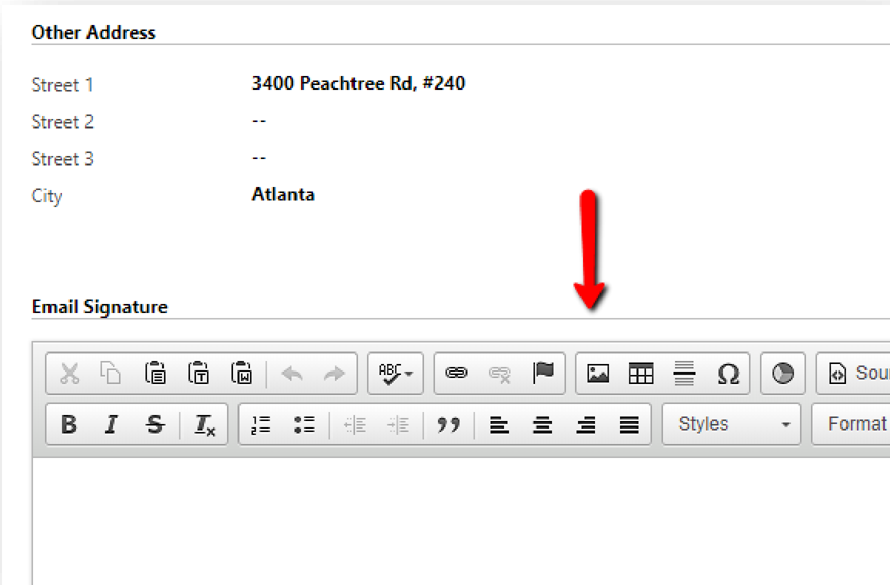
9. Emails will be triggered immediately to all recipients on your marketing list. Click on the campaign to view more information about it (successes, bounces)





Updating User Email Signature

1. Navigate to Settings > Security > Users in the navigation ribbon
2. Open the user that you would like to edit and scroll down on the form until you have reached the Email Signature editor



3. Copy/Paste user's signature into the editor. Save and close user record.