FRM Solutions, Inc Global CRM Topics

Updated 11/26/2017



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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.

Filipport						
WICTOSO	oft Dynamics CRM					
m			0 ⁰	<u>آ</u>	1	?
FIM DESIG		FRANCHISE SALES	OPERATIONS	ROYALTY MANAGEME	MARKETING	HELP

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.

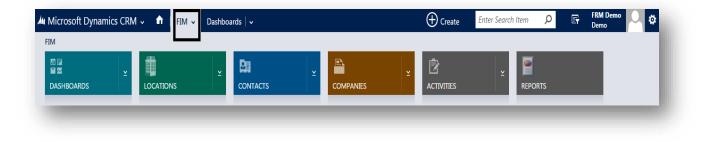
I Microsoft Dynamics CRM 🗸 🏚 FRANCHISE SALES 🗸 Dashboards 🗸	Create Enter Search	n Item 🔎 🕞 🕅 Der	mo
Franchise Sales	D		
DASHBOARDS REPORTS LEADS OPPORTUNITIES	CONTACTS	APPLICATIONS	FRANCHISE DISC

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.

		Demo	
Recently Viewed	<u> </u>		
Sales Overview Activity Overvie. Personal Sales Operations: Sto. Operations	erations: Sit Microsoft Dyna Marketing Das	Sales: FDD's Personal Sales	Custom



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.

esign/Construction	_										
	v		~	a	×	Ê	•	e			
DASHBOARDS		LOCATIONS		CHECKLISTS		ACTIVITIES	-	REPORTS			

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.

perations						
	×		⊻		⊻	P
DASHBOARDS		SITE VISITS		CASES		KNOWLEDGE BASE

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.

🏄 🗸 🏦 HELP 🗸 FRM Help Links		\oplus	Q	Ę	Admin Account Demo	۵ 🕈
🖄 NEW ACTIVITY 👻 🕂 NEW RECORD 👻 📝 IMPORT DATA						
FRM Help						
The following help options are available:						
FRM Support Portal Visit the FRM Support Portal.	FRM Produc View Available FR					
Change My Password You will need to know your current password.	Microsoft Dy General CRM He		M Help			
	_	-	-		_	_

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:

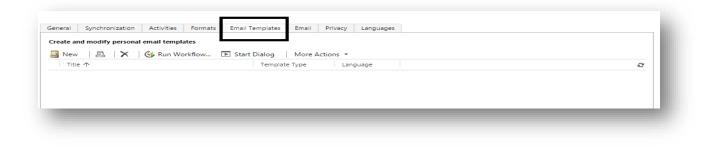
🕯 Microsoft Dynamics CRM 🗸 👘 FIM 🗸	Dashboards 🗸	① Create	Enter Search Item 👂	FRM Demo
🕞 SAVE AS 📲 NEW 🤗 REFRESH ALL				Options
Personal Sales Dashboard 👻				Open Navigation Tour About
reisonal sales Dashboard	My Open Leads ↔			Privacy Statement
FRM Sales Funnel	Search for records)		
My Open Opportunities		Source Campaign Disposition	Net Worth Business Pho	on Email State
	Bob Wright Web Lead	New		



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

	display settings to) personalize	Microsoft Dynamic	s CRM, a	nd manag	e your email tem	plates.	
ieneral Synchroniz	ation Activities	Formats	Email Templates	Email	Privacy	Languages		
Select your home pag	e and settings for	Get Started p	oanes		_			
Default Pane	<default (<="" based="" td=""><td>on user role></td><td></td><td></td><td>▼ De</td><td>fault Tab</td><td><default based="" on="" role="" user=""></default></td><td>٣</td></default>	on user role>			▼ De	fault Tab	<default based="" on="" role="" user=""></default>	٣
Records Per Page	50 de in Advanced Fin	nd			•			
	Simple		🔵 Detai	led				
Advanced Find Mode	 Simple 							
Advanced Find Mode Set the time zone you								

- 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.

Activolo					
A ctu io I o					
System Views	cations ~				
Active Locations		City	State	Main Phone	
Inactive Locations		Atlanta	GA	(865) 555-1656	
Insurance Non-Comp	liance	Construction of Participation of		(739) 538-7922	
Pending Locations		Atlanta	GA	(622) 025-8082	
Projected Openings (
Renewals (Next 12 M Royalties (Late)	ontris)	Atlanta	GA	(622) 025-8082	
Without Insurance Ce	ert	Charlotte	North Carolina	(565) 893-8329	
My Views		Charlotte	North Carolina	(565) 893-8329	
My Own Query		Charlotte	North Carolina	(565) 893-8329	
Create Personal View		Phoenix	AZ	(265) 868-0741	
Save Filters as New V	iew	Boston	MA	(688) 482-8354	
	t View	2022/22/22/2011			

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

NEW 🛅 DELETE 💌 🖘	EMAIL A LIN		EPORT - 🕼 EXPO	RT TO EXCEL 🛛 🕏 IMPORT
Active Locatic	ons ~			
System Views		-		
Active Locations		City	State	Main Phone
Inactive Locations		Atlanta	GA	(865) 555-1656
Insurance Non-Compliance				(739) 538-7922
Pending Locations		Atlanta	GA	(622) 025-8082
Projected Openings (Next 6 Mo	nths)	1000 1000		
Renewals (Next 12 Months)		Atlanta	GA	(622) 025-8082
Royalties (Late) Without Insurance Cert		Charlotte	North Carolina	(565) 893-8329
	(Charlotte	North Carolina	(565) 893-8329
My Views My Own Query		Charlotte	North Carolina	(565) 893-8329
Create Personal View	3	Phoenix	AZ	(265) 868-0741
Save Filters as New View		Boston	MA	(688) 482-8354
Save Filters to Current View	open	Louisville	KY	(730) 443-9012
#131	Öpen	Liberty	MÖ	(404) 944-0945



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*):

	🔹 🖘 EMAILA LIN	NK - FIRUN R	EPORT - 18 EXPO	RT TO EXCEL 💽 IMPORT (
a second				
Active Loo	cations ~			
System Views				
Active Locations		City	State	Main Phone
Inactive Locations		Atlanta	GA	(865) 555-1656
Insurance Non-Compli	ance			(739) 538-7922
Pending Locations			-	
Projected Openings (N	ext 6 Months)	Atlanta	GA	(622) 025-8082
Renewals (Next 12 Mor	nths)	Atlanta	GA	(622) 025-8082
Royalties (Late)		Charlotte	North Carolina	(565) 893-8329
Without Insurance Cert	ŧ.	Charlotte	North Carolina	
My Views		Chariotte	North Carolina	(565) 893-8329
My Own Query		Charlotte	North Carolina	(565) 893-8329
Create Personal View		Phoenix	AZ	(.265) 868-0741
Save Filters as New Vie	W	Boston	MA	(688) 482-8354
Save Filters to Current	View			
	open.	Louisville	KY	(730) 443-9012
#131	Öpen	Liberty	MO	(404) 944-0945

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

System Views		
Active Locations	City	Sta
Inactive Locations	Atlanta	GA
Insurance Non-Compliance		
Pending Locations		
Projected Openings (Next 6 Months)	Atlanta	GA
Renewals (Next 12 Months)	Atlanta	GA
Royalties (Late)	Charlotte	No
Without Insurance Cert		
My Views	Charlotte	No
My Own Query	Charlotte	Nor
Create Personal View	Phoenix	AZ
Save Filters as New View	Boston	МА



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:

System Views		
Active Locations	City	State
Inactive Locations	Atlanta	GA
Insurance Non-Compliance		
Pending Locations		
Projected Openings (Next 6 Months)	Atlanta	GA
Renewals (Next 12 Months)	Atlanta	GA
Royalties (Late)	Charlotte	North Carolina
Without Insurance Cert		
My Views	Charlotte	North Carolina
My Own Query	Charlotte	North Carolina
Create Personal View	Phoenix	AZ
Save Filters as New View	Boston	МА

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:

m	<u>م</u>	Filter with: None 🔻	
ompanies 🕀	Contacts 🕀	Leads 🕀	Opportunities \oplus
	Brett Sheley	2/9/2016 3:46 PM	Brian Craig
	Brett Sheley - PLACEH	CO Eric Stoll	Brian Craig
Todd Gurley	Cumming	Eric Stoll	
<u>.</u>	Brett Sheley	8/18/2015 1:25 PM	Jane Smith
	Brett Sheley - PLACEH	Brett Butler	Jane Smith
Sam Stout	Cumming	Brett Butler	

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:

1	מ	
ompanies 🕀	Contacts \oplus	Lead: Company Contact
<u> </u>	Brett Sheley Brett Sheley - PLACEH	2 Opportunity User El Competitor
Todd Gurley	Cumming	Er Activity

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:

Microsoft Dynamics CRM 🗸 👘	FIM 🗸 Companie	s •			🕀 Creat	e Enter Search Item	ρ	FRM Demo Demo	0	\$ (
🕂 NEW 🗴 DELETE 🔽 🗢 EMAIL A LINK	▼ 🕅 RUN REPORT ▼	EXPORT TO EXCEL	IMPORT DATA	 CHART PANE 	*					
Ħ Active Companies ◄					[Search for records			Ļ	>
✓ Company Name ↑	Category	Relationship Type	City	Address 1: State/Provi	Main Phone	Franchise Consultant	Parent Account		T (3
		Prospect	Churchville		(318) 868-2410	Demo Franchisor				
	Single-Unit	Prospect	Athens		(555) 555-5555	Demo Franchisor				-



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

H 5	Search Results 🖌			canada world	airways		Q
~	Company Name 🛧	Account Number	Primary Contact	City	Main Phone	Em,	T a
	Canada World Airways	AFFSE9IK	Ginger Massey	Lynnwood	(166) 858-3558 x	some	one4@e

Recording Notes

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

	Brand	Anderson Roth	
Enter a note			î
_			_

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

NOTES					
Will be attaching the new co	Ι				
l) Attach				Done	-
-	_	_	_	_	_

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

Title Will be attaching the new co	
(i) Attach Done	
·	
	J



3. Click **Done** to save

itle		
Vill be attaching the new contract next week!		
Choose File No file chosen	Done	

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:

Common			#125	7				
Ż		Ē.	È					++
ACTIVITIES		CLOSED ACTIVITIES	DOCUMENTS	SITE VISITS	LOCATIONS	FRANCHISE	TERMS	
General								
						Contacts		
General	#125		County			Contacts		
General Location Number *	#125		County Country			Contacts Contact ↑	Company	Role Tyj
General General Location Number* Address 1 Address 2								Role Ty



- 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.

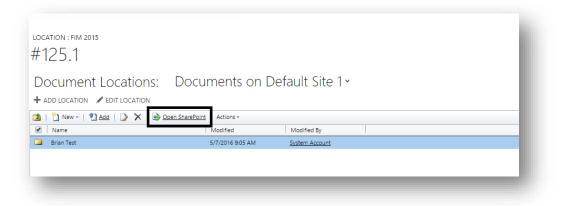
8	An embedded page at documents15.frmsolutions.com says:
	A folder will be created in the location: https:// documents15.frmsolutions.com/sites/Demo/ rc_location/-125-1_82171ED4BF01E61180C5000D3A119DBC
	Click OK to continue. Prevent this page from creating additional dialogs.
	Cancel

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.

LOCATION : FIM 2015 #125.1			1
Document Locations: + ADD LOCATION CEDIT LOCATION	Documents on De	efault Site 1×	
Document	Modified	Modified By	
Folder	5/7/2016 9:05 AM	System Account	



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:

	Demo 💉 EDIT LINKS						
	Location 🛌	-124_B3	4EC9753	D83E211B57E	E000C29E211A	0	
Home	\oplus new document or			2			
Documents	All Documents ···· Fin			•			
Site Contents	✓ D Name			pdf	Dr	op here	
🖉 EDIT LINKS			Modified B	+ Copy			
EDIT LINKS	📕 Brian Test 🛛 🚥	About a minute	ago soystem Accoun	t copy			
						-	
View							~ 😮
PC > Downloads > New folder					v 0	Search New folder	Q
Name ^	Date modified	Туре	Size				
Signed FRM MSA 5207	5/10/2016 8:13 PM	PDF File	6,014 KB				

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

	s: Documents on Default Sit	te 1 ×
+ ADD LOCATION EDIT LOCATION Add Add X	Open SharePoint Actions -	
Name Rian Test Signed FRM MSA 5207	Modified Modified By 5/30/2016 12:33 PM System Accou 5/30/2016 12:37 PM FRM\administ	
Signed FRM MISA 5207	5/50/2016 12:57 PM	



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:

Document Locations: Docun ADD LOCATION / EDIT LOCATION	lei	its on Delauit site 1*	
🔰 🏪 New - 🐑 Add 🍃 🗙 🌛 Open SharePoint	Actio	ons 🗸	
Name Name	Lè	Check Out	1
Brian Test 5	1	Check In	
	4	Discard CheckOut	
	2	Alert Me	
		Download a Copy	
		Copy Shortcut	
		Send Shortcut	
		View Properties	
		Edit Properties	
	(Version History	

Deactivating Vs. Deleting Records

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

+ 1	NEW 🖋 EDIT 🗸 ACT	TIVATE	IVATE <u> </u>	E 🛛 🕶 SEND (DIRECT EMAIL 😤 A	SSIGN	•••			
*	Active Locat	ions ×								
\checkmark	Location Number Λ	Status Reason	City	State	Main Phone		Royalty %		Advertising %	Security Deposit
	#123	Open	Atlanta	GA	(865) 555-1656			4.00	2.00	
	#124	Open			(739) 538-7922			5.00	1.00	
~	#125	Open	Richmond	VA	(622) 025-8082					
~	#125.1	Pending	Richmond	VA	(622) 025-8082					
~	#126	Open	Charlotte	North Carolina	(565) 893-8329	3				
~	#126.1	Pending	Charlotte	North Carolina	(565) 893-8329					
	#126.1	Pending	Charlotte	North Carolina	(565) 893-8329					
	#127	Open	Phoenix	AZ	(265) 868-0741					
	#128	Open	Boston	ма	(688) 482-8354					

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:

Confirm Deactivation		×
Do you want to deactivate the selected 1 Location?	You can reactivate it later, if you wish.	- 1
		- 1
This action will change the status of the selected Lo	cation to Inactive.	- 1
		- 1
		_
	Dealtivate Cancel	

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**:

				Check Portal Access		
CONTACT	: CONTACT 2015 🔻			Send Email		
Bret	t Shelev			👌 Run Nurture		
	e en energ			Kara ClickDimensions Quick Send		
Summary				📲 Run Campaign Automation		
CONTACT INFORMATIO	DN .			🗘 Share	ACTIVITIES	NOTES
Salutation		Job Title		🔅 Run Workflow	All 🗸 Ad	ld Phone Call
Full Name*	Brett Sheley	Relationship Type *	Prospect	Start Dialog		
Business Phone	(555) 555-5555	Home Phone	'	Run Report		dmin Account dmin Account h
Mobile Phone		Fax		🖞 Other Activities 🔹 🕨	Drip Campaign Step	1 A
Email *	bsheley@frmsolutions.com	Preferred Method of Contact	Any		A Message	unt
Address	3400 Peachtree Rd. NE Suite 240				Portal Activity	nt h
	Atlanta, GA 30026 United States of America				SMS Message	PM
Description					Iext Mes SIVIS Message	ge unt



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

SMS MESSAGE : IN			
		-	
INGM 21	/IS Messag	e	
Created By	Date Created	Activity Status* Owner*	
₽		Open & Admin Accour	
General			
General			
Disease Number	(555) 555 5555		
Phone Number	(555) 555-5555 Hi Bretti		
SMS Message	Hi Brett!		

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

	SAVE & CLOSE 🔳 F	FORMIEDITOR		
SMS MESSAGE : IN	IFORMATION			
New SN	/IS Messag	е		
Created By	Date Created	Activity Status* Open	Owner*	
General				
General Phone Number	(555) 555-5555			
	(555) 555-5555 Hi Brett!			
Phone Number				

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





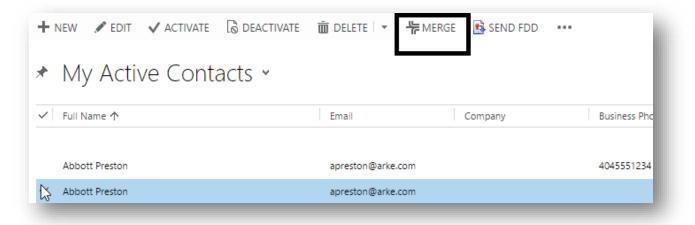
Merging Records

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:

*	My Active Contacts ~			
~	Full Name 🔨	Email Con	mpany	Business Phone
	Abbott Preston	apreston@arke.com		4045551234
~	Abbott Preston	apreston@arke.com		
	Assign Logic Test 13	test4@arke2.com		
	Brett Sheley	bsheley@frmsolutions.com		(555) 555-5555
	Brian Poff	bpoff@arke.com		
	Doug Gilmour	tcorcoran@arke.com		

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:

Merge Records Select the master record, and th	en select the fields to merge into the ma	aster record.	?
Master Record and Field Select	ction		
Master Record :	Abbott Preston	🗘 🔲 🔚 James Smith	\$
	 Select all fields in this section 	O Select all fields in this section	
Email *	@apreston@arke.com	smith@gmail.com	
Business Phone	4045551234	0	
CONTACT INFORMATION	 Select all fields in this section 	Select all fields in this section	
First Name ⁺	Abbott	James	
Last Name *	Preston	Smith	
Business Phone	• 4045551234		
Email *	@apreston@arke.com	smith@gmail.com	
Relationship Type *	Prospect	Prospect	
Preferred Method of Contact	Any	Any	
Marketing Information	O Select all fields in this section	Select all fields in this section	
Send Marketing Materials	Do Not Send	Send	
		ОК	Cancel

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

	Select all fields in this section	Select all fields in this section	
Password	•?:^7R4R+	0	
Username	() test	0	
	Select all fields with data. If both records have data	in the same field, the master required field is selecte	٠d.
🕕 Note: The master r	record will inherit all of the subordinate record's child rec	ords. The subordinate record will be deactivated	
		ОК	Cancel



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:

TARGETED FOR SALES REPORT DETAILS INVOICES ORDERS	Microsoft Dynamics CRI	M → 🏦 FIM → Locati	ons 🗸 🛛 #123 🗸			Ð
	C TARGETED FOR	Landatan			\sim	

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:

on: All Fields	۲]			
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
/23/2016 11:15 PM	Admin Account	Update	Sales Reporting Metho	. Polling	Web Form
0/8/2015 11:56 AM	Admin Account	Update			
0/8/2015 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:

ilter on:	All Fields	•	
	All Fields	N	
	Select a field	N	
	Address 1		
4/1	Address 2		
	Address 3		
	Address Tag		
4/1	Advertising %		
	Agreement Renewal Date		
	Agreement Signed		
2/23	Anchors		
10/0	Apply Late Fees		
10/8	Area Development Agreement		
10/8	Bldg Ownership Type		
10,0	Brand		
10/8	Building Type		
	Certificate Received		



Creating Email Templates

1. Navigate to Marketing > Templates in the FRM ribbon

Microsoft Dynamics CRM	🗸 🏦 MARKETING 🗸	Templates	
< ☐ MARKETING LISTS ≚	Y ⊥ CAMPAIGNS	QUICK CAMPAIGNS \succeq TEMPLATES	

2. Select Email Templates

Templates Which feature would you like to work with? Image: Second state of the second	Micros	soft Dynamics CRM 🗸 🏦 MARKETING 🗸 Templates
Article Templates Create and manage templates for articles in the knowledge base. Email Templates	Templat	tes
Create and manage templates for articles in the knowledge base.	Which fea	ture would you like to work with?
	\gg	•

3. Select New

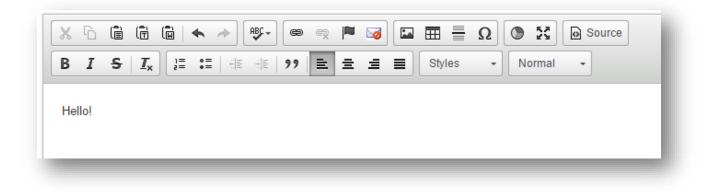
¼ Microsoft Dynamics CRM 🗸	✿ │ MARKETING ~
Email Templates	▶ Start Dialog More Acti



 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.

Email Templ	ate Type	×
Select a template type to	use for this new email templ	ate.
Template Type	Global Global Lead Opportunity Company Contact Quote Order Invoice Case Contract Service Activity System Job	

- 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:



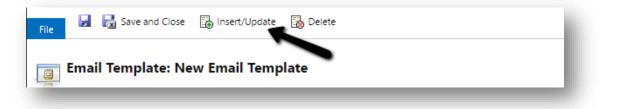
This editor will accept HTML by selecting the **Source** button in the screenshot above.



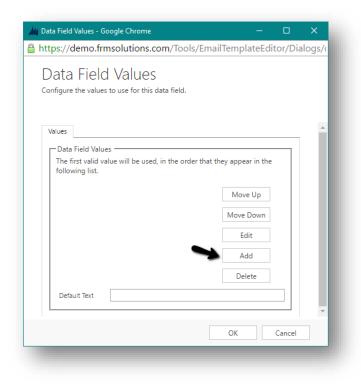
- 7. If you selected a template type other than **Global** you have the ability to inject data from the FRM record directly into the email automatically. In the following example, we will use a template type **Lead** and inject the Lead's first name into our email.
- 8. Place the cursor in your editor 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)

	ata Value o the data field.		×
Record Type Field	User User Lead		
_		ОК	Cancel

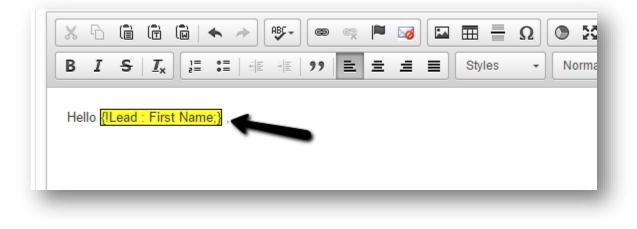
12. Select the field you would like to add (First name) then click OK

Add L	ata Value		×
Add a value t	o the data field.		
Record Type	Lead		•
Field	Account		•
Heid	Entity mage		
	Est. Close Date		^
	Est. Value		
	Est. Value (Base)		
	Est. Value (deprecated)		
	Evaluate Fit		
	Exchange Rate		
	Experience Level		
Default	Facebook		
	Fax		
	First Name		
	First Time Buyer		
	Franchise Interest	First Name	
	Gender		
	Grade		
	Home Phone		
	Identified On		
	Image		
	Import Sequence Number		
	Imported Id		-

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**

+ 1	NEW 🖍 EDIT 🛅	DELETE 🔽 🔭 MERGE	SEND DIRECT EMAIL	ADD TO MARKETING LIST	<u>Å</u> å /
-	My Open I	Leads 🖌	/		
~	Topic	Lead Source	Source Campaign	Disposition	Net W
	Ram Katalan	Web Lead	AndersonRoth.com	New	10,000
•	Christina Chambers	Web Lead	AndersonRoth.com	New	7,000,
•	Eric Stoll			New	
~	LeadCapture Testing 1	web lead - franchiseopport.		New	50000
	Jane Doe	Social Media		In Progress	



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)

Language	English	۲		•	
Global Template	:5	*		Global Templates	
📮 Brian Test			Created By:	Admin Account	
Example Ter	mplate - Joshua Global		Created On:	5/21/2014	
Template			Description:		
📓 Marketing o unsubscribe acl	communication nowledgement				
Lead Templates					
AP Lood A	uto Poply	•			
	o: ords on current page mail only to the records y	ou sel	ected on this page.	•	
All records of	n current page				
Send direct e	mail to all the records on	this pa	ge.		
All records o	n all pages				
	n all pages mail to all the records on	all the	pages in the current	view.	
	mail to all the records on	all the	pages in the current	view.	

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".

🕒 🕀 Search CRM data	<mark>ک</mark> 🕞	Sean Ellison ArkeCRM
		Options
		Print preview
		Apps for Dynamics CRM
Case Number Priority CAS-06859-S9 S4 - Normal	Created On	See Welcome Screen
		About
		Privacy Statement

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.

Set Per Change the def				Microsoft Dynamic	cs CRM, and manag	e your en	nail templa	tes.			
General Synch	ronization	Activities	Formats	Email Templates	Email Signatures	Email	Privacy	Languages			
Select your home	e page and	settings for G	et Started p	anes							
Default Pane	De	ivery			▼ De	fault Tab		Dashbo	ards		
Set the number of	of records s	hown per pag	je in any list	of records							
Records Per Page	50				•						
Select the defaul	t mode in i	Advanced Fin	•								
Advanced Find M	-	Simple		🔵 Detai	iled						
Set the time zon	e you are ir					4					
Time Zone	(GN	/IT-05:00) East	ern Time (US	& Canada)	•						
Select a default of	currency					٦					
Currency					Q						
	if you are u		Contrast setti	ngs in your browser	or operating system.						
Enable high	ontrast										
										ОК	Ca



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..."

Chrome	Settings
Extensions	Show Home button
Settings	New Tab page Change
	Always show the bookmarks bar
About	Search
	Set which search engine is used when searching
	Google 🔻 Manage search engines
	People
	Person 1 (current)
	Enable Guest browsing
	Let anyone add a person to Chrome
	Add person Edit Remove Im
	Default browser
	Make Google Chrome the default browser
	Google Chrome is not currently your default bro
	Show advanced settings

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

Content settings	Clear browsing data
g	g
Google Chrome may u	so web convises to improve you
Google Chrome may u	se web services to improve your



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.

Obliterate the following items from:	the beginning of time 💌
Browsing history	the past hour the past day
Download history	the past week 1 the last 4 weeks
Cookies and other site and plu	the beginning of time
Cached images and files	
Passwords	
Autofill form data	
Hosted app data	
Media licenses	
	3
	Clear browsing data Cancel

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".

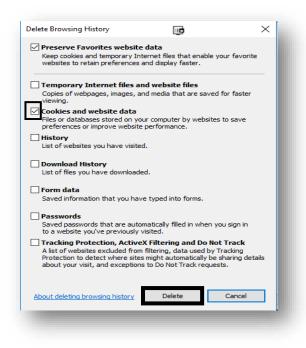
et your new browser ×	<u>↑</u> ★ 🥨
File	
Zoom (100%) Safety	+ +
Add site to Start menu	
View downloads	Ctrl+J
Manage add-ons	
F12 developer tools	
Go to pinned sites	
Internet options	
About Internet Explorer	

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

nternet Options			UD			? ×
General g	Security	Privacy	Content	Connections	Programs	Advanced
Home pag	-					
				type each add	ress on its o	
~	nttp:	//my.yaho	oo.com/			
		Use cu	rrent	Use default	Use n	ew tab
Startup -						
◯Sta	rt with ta	bs from t	he last ses	sion		
🖲 Sta	rt with ho	ome page				
Tabs —						
Change	e how we	ebpages a	re displaye	d in tabs.	Ta	abs
Browsing	history					
	tempora formatio		story, coo	kies, saved pas	swords, and	d web
Del	ete brow	sing histo	ry on exit			
				Delete	Set	tings
Appeara	nce —					
Co	lors	Lang	juages	Fonts	Acce	ssibility
						_



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



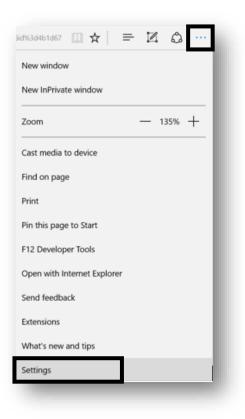
4. Finally, select "Apply" then "OK" on the "Internet Options" window and log into the FRM Portal as usual.

General se						
	curity P	rivacy Co	ntent (Connections	Programs	Advanced
Home page	To create	home pag		ype each add	ress on its o	own line.
						~
		Use currer	nt	Use default	Use n	ew tab
-	with tabs	from the la e page	ast sessio	on		
Change l Browsing h		oages are d	lisplayed	in tabs.	Ta	abs
Delete te		files, histor	y, cookie	es, saved pas	swords, and	d web
Delet	e browsin	ig history o	n exit			
				Delete	Set	tings
Appearanc Colo		Languag	jes	Fonts	Acces	ssibility
			OK	6	ancel	Apply

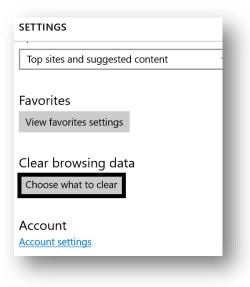


For Edge:

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.





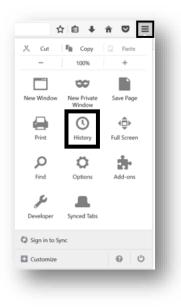
3. When the "Clear browsing data" window appears, check the box next to "Cookies and saved website data" and select "Clear".

« Clear browsing data	
Browsing history	
Cookies and saved website data	
Cached data and files	
Download history	
Form data	
Passwords	
Show more \vee	
Clear	

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

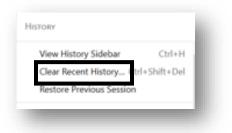
For Firefox:

1. Select the "Open Menu" symbol \equiv 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".

Clear All History		₿	×
Time range to clear:	Everything		~
	ected items will be cleared. ction cannot be undone.		
∧ D <u>e</u> tails			
Browsing & Down	load History		^
Form & Search Hi	story		
Cookies			
Cache			
Active Logins			
Offline Website Da	ata		
Site Preferences			~
	Clea	r Now Ca	ancel

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

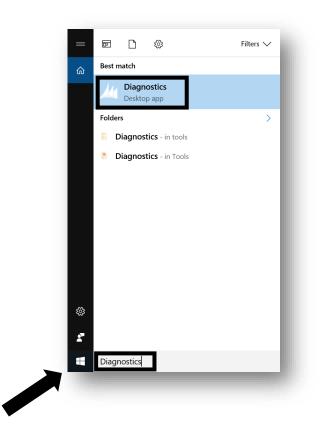


Stopping Sync of Contacts from FRM to Outlook

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".



Microsoft Dynamics CRM Diagnostics		U	-
Synchronization Troubleshooting Advance	d Troubleshooting		
Select a check box to enable a synchroniza	ation process. Clear t	he checkbox to disable it.	
Outlook Synchronization Synchronizes Outlook email, appointme	nts, tasks, and cont	acts with Microsoft Dynamic	s CRN
Background Send Email Handles email marked for sending from	the Microsoft Dynar	iics CRM Web application.	
Background Track Email Automatically links and creates a record set in Personal Options.	l in Microsoft Dynam	ics CRM for those emails the	at mee
Automatic Email Tagging Retrieves email changes from CRM to s of an email in your mailbox. Your admini- for the entire organization.			
Offline Data Updates			
To help you to go offline more quickly, I data with changes to Microsoft Dynamic			
		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).



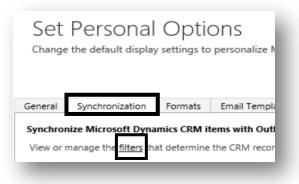




2. On the newly populated screen, double click the "Options" box.



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.

<i>6</i> a	New 🗙 🕑 🖲 More Actions 🗸			
~	Name	Status ↑	Returned Type	Description
	My Appointments	Active	Appointment	Appointments Synced To Outlook
	My Service Activities	Active	Service Activity	ाह Service Activities Synced To Outloo
	My Tasks	Active	Task	Tasks Synced To Outlook
	My Recurring Appointments	Active	Recurring Appointment	Recurring Appointments Synced To
~	My Outlook Contacts	Active	Contact	Contacts Syncing to Outlook
	My Letters	Active	Letter	Letters Synced To Outlook
	My Faxes	Active	Fax	Faxes Synced To Outlook
	My Phone calls	Active	Phone Call	Phone calls Synced To Outlook

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:

Type *	Lead Template
Title *	Test
Description	
U Warning:	Unsubscribe link not found in template
Subject *	Test
860	🗎 🛱 📾 🛧 🛷 🕸-] 📾 🙊 🏴 🐼 🖾 🎛 🗮 🚆 Ω] 💽 🔀 [🖻 Source]
BI	S I _x] = := HE HE 99 ≥ = = ■ Styles - Format -
Hello,	
Please un	subscribe by clicking the below:

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

egarding	رث	Brian Test
X 6		▶ → ₩- @
BI	S <u>I</u> _x]≡	:= 4 4 99
	unsubscribe by cli scribe <u>here</u>	icking 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.

Quick Campaigns	▶ =	
Subject		
No Quick Campaign reco	ords found.	
•	Þ	

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

lect the Activity Type and Owners	
ctivity Type:	
🕻 Phone Call	_
T Appointment	
E Letter	
E Fax	
🗠 Email	-
The owners of the records that are included in the quick campaign	
Assign to another user or team	
Assign to another user or team	Q
Add the created activities to a queue	~
	q
Add the created activities to a queue	~
	~



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

(Create a Quick Campaign	
	Specify the Content of the Activity	
S	pecify the details of the quick campaign by filling out the available elds in the act Use Template	

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

Header		î.
From Subject	La Admin Account	
k 🖻 🛍	B / U 📰 🗮 🗄 🗄 🖆 🗊 🐴 🔥 A - 🐼 Unsubscribe	
		- 18
		- 18
		- 18
		- 18
		-

- 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)

Quick Campaigns	+ 🗉
Subject	
September Campaign	
4	۱.

INFORMATION

Subject *	September Campaign	
Owner*	🌡 Admin Account	
No. of Successes	5	
No. of Failures	0	
Error Details		

activiti AII ↓	ES Add Phone Call		
	Admin Account Test Today		
	Admin Account Test Today		
	Admin Account Test Today		
		_	



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

treet 1	3400 Peachtree Rd, #24	40		
treet 2				
treet 3				
mail Signature	Atlanta	ļ		
				Sou
X 6 â		·		
× 6 🕯 B I S) E E E E	Styles -	Forma
			Styles -	Forma
			Styles -	Forma

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