

FRM Solutions, Inc

Franchise Information Manager (FIM)

Updated 06/30/2016



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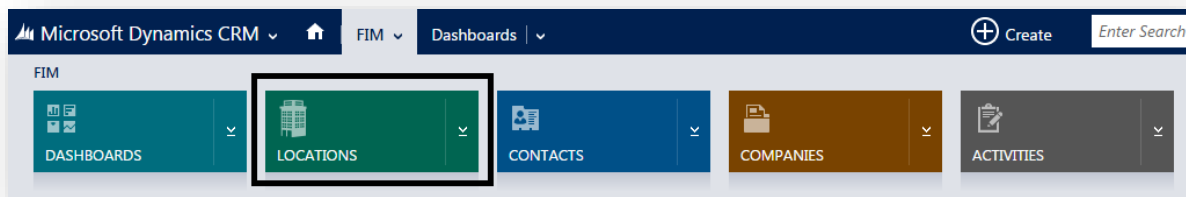
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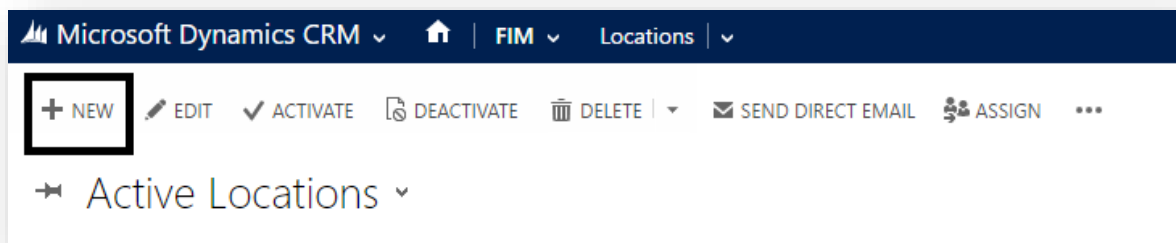
Open / Close Location

FIM (Franchise Information Manager) is the FRM module where you will find legal/compliance information about your franchisees, the entities that own them, any contacts associated with them and location information related to them. (Should probably explain too, that the example given is the most frequently used way to access information in FIM, but that when a location has not yet been established, information is still accessible, from other tabs, such as Companies, Contacts, etc.

1. Go to **FIM** module and from the drop-down select **Locations**:



2. To create a new location, click on **New** option:





3. Enter the **number** or **name** of the location (mandatory field); you can also add the information that you find relevant in the other fields:

LOCATION : FIM 2015

New Location

General

General

Location Number *	<input type="text"/>	County	--
Address 1	--	Country	--
Address 2	--	Territory	--
Address 3	--	Launch Stage	--
City	--	Main Phone	--
State	--	Secondary Phone	--

4. After adding the necessary information, click on **Save** option:

Microsoft Dynamics CRM | FIM | Locations | New Location

SAVE SAVE & CLOSE + NEW FORM EDITOR

LOCATION : FIM 2015

New Location

5. After you have saved the information added, you will be able to add contacts related to the locations:

Contacts

Contact ↑	Company	Role Type	Email (Contact)	Business Phone (Contact)
-----------	---------	-----------	-----------------	--------------------------

No Location Contact records found.



- After adding your contacts assign Location ownership records following a similar process as #5 above.

Company ↑	Contact	% Ownership	Primary
No Location Ownership records found.			

- When you open a location the automatic status will be **Pending**, you can change it to **Open** or **Closed** from the drop-down:

Franchise Agreement

Status

Status: Pending, Open, Closed, Transfer, Non-Renewal, Terminated

Outlet Type *

Predecessor

Successor

Agreement Signed

Opened On

Close Date

Close Reason

- "Save and Close" after you have finished updating the location.

SAVE SAVE & CLOSE DELETE RUN REPORT APPLY CHECKLIST INITIATE TRANSFER VALIDATE ORDERING

LOCATION : FIM 2015

#99



Transfer Location

1. Open the location and from the menu at the top of the page select **Initiate Transfer**:

SAVE SAVE & CLOSE DELETE RUN REPORT APPLY CHECKLIST **INITIATE TRANSFER** VALIDATE ORDERING ...

LOCATION : FIM 2015
#99

2. In the pop-up page, you have the option to choose if you want to create a new location or an opportunity; To create a new location select **Location** and then click on **Next**. You may also select **Opportunity** if you anticipate a transfer. This will not create a new location but instead an opportunity you may close as “won” at a future date.

FRM - Initiate Location Transfer

Choose the method you wish to use for this transfer:

Location - a new Location record will be created
Opportunity - a new Opportunity with a type of "Transfer" will be created

☒ Location
☐ Opportunity

Tip

Click to add comments

Help Summary **Next** Cancel



- The new transferred location will be labeled with the name of the original location with a **.1** appended to the end of the number/name; Click **Next** and then **Finish** to create it. Please note that you can change the **.1** or **.2** appended to your location name to anything you choose. It is not mandatory to follow that naming convention.

FRM - Initiate Location Transfer

A new Location record has been created and is in your Locations list. Transferred locations will be labeled with the name of the original location with a .1, .2, .3 etc. attached at the end of the number.

Tip

Click to add comments

Help Summary Previous **Next** Cancel

- The transfer does not make any changes to the original location; you can verify both the original and the new locations in your **Active Locations** list; the status for the transferred location will be **Pending**.
- You can change the status of your predecessor location to **Transfer** from the Status drop-down under **Franchise Agreement** section:

Franchise Agreement

Status

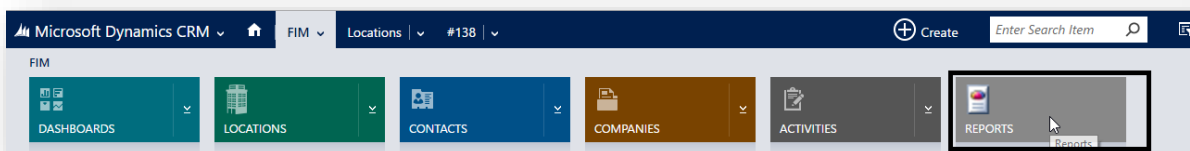
Status	Transfer
Outlet Type*	Franchised
Predecessor	--
Successor	#99.1
Agreement Signed	--
Opened On	--



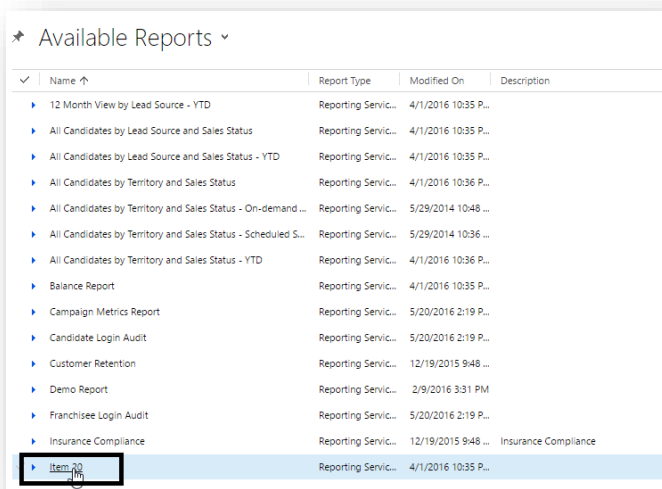
Produce Item 20 Report

FRM comes with a set of predefined reports, one of which is the **Item 20 Report** (useful in relation to your locations: franchised or company owned).

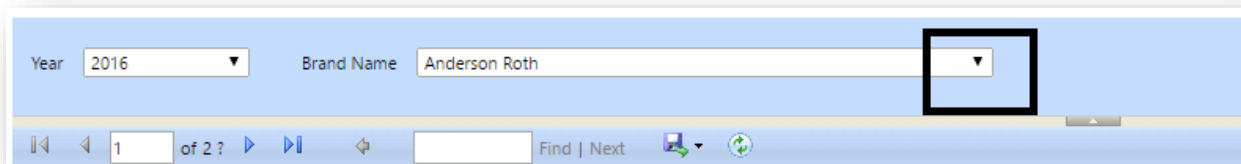
1. Go to **FIM** icon and from the Drop-Down select **Reports**:



2. From the **Available Reports** list select **Item 20** and click **Run Report** at the top of your screen:

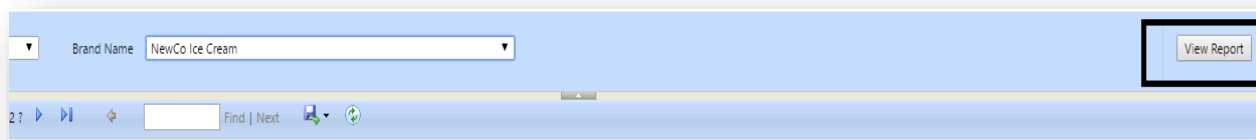


3. The report will be generated with data for the current year and for your brand (if you have multiple brands you can select them from the drop-down);





4. After changing the filters as needed, click on the **View Report** option (right side of the page):



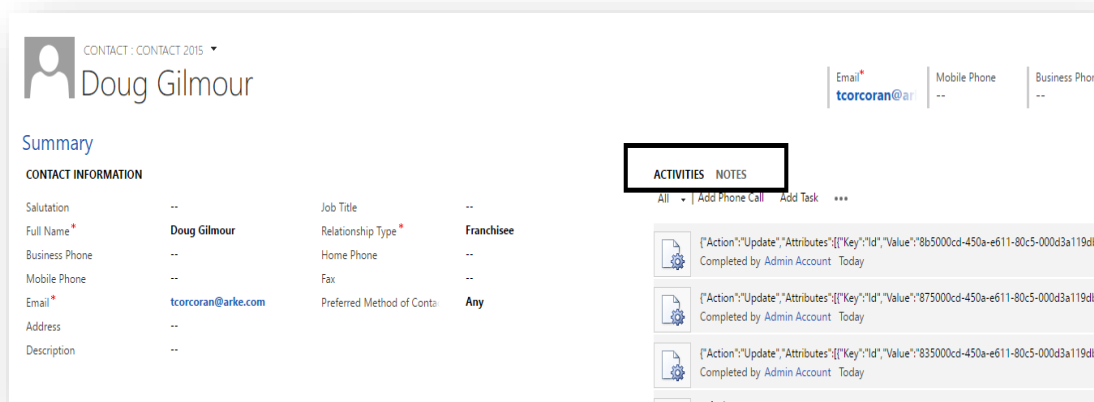
5. You may save reports as PDF's, Excel Spreadsheets among many other formats.

Track Pages & Documents Viewed on Intranet

If you purchase Intranet or a Candidate Portal you will be able to track activities made by your franchisees/candidates.

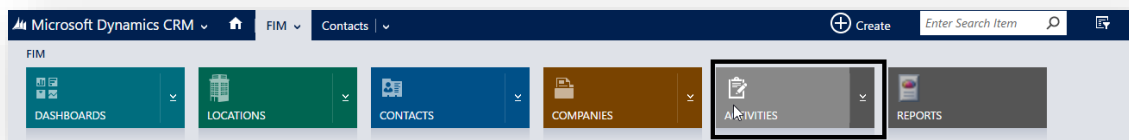
You can access this information using different methods:

1. Select **Contact** from the ribbon
 - 1.1 Go to a contact you would like to review and double click/open the record
 - 1.2 In the right side of the page you will find the list of **Activities** for this contact

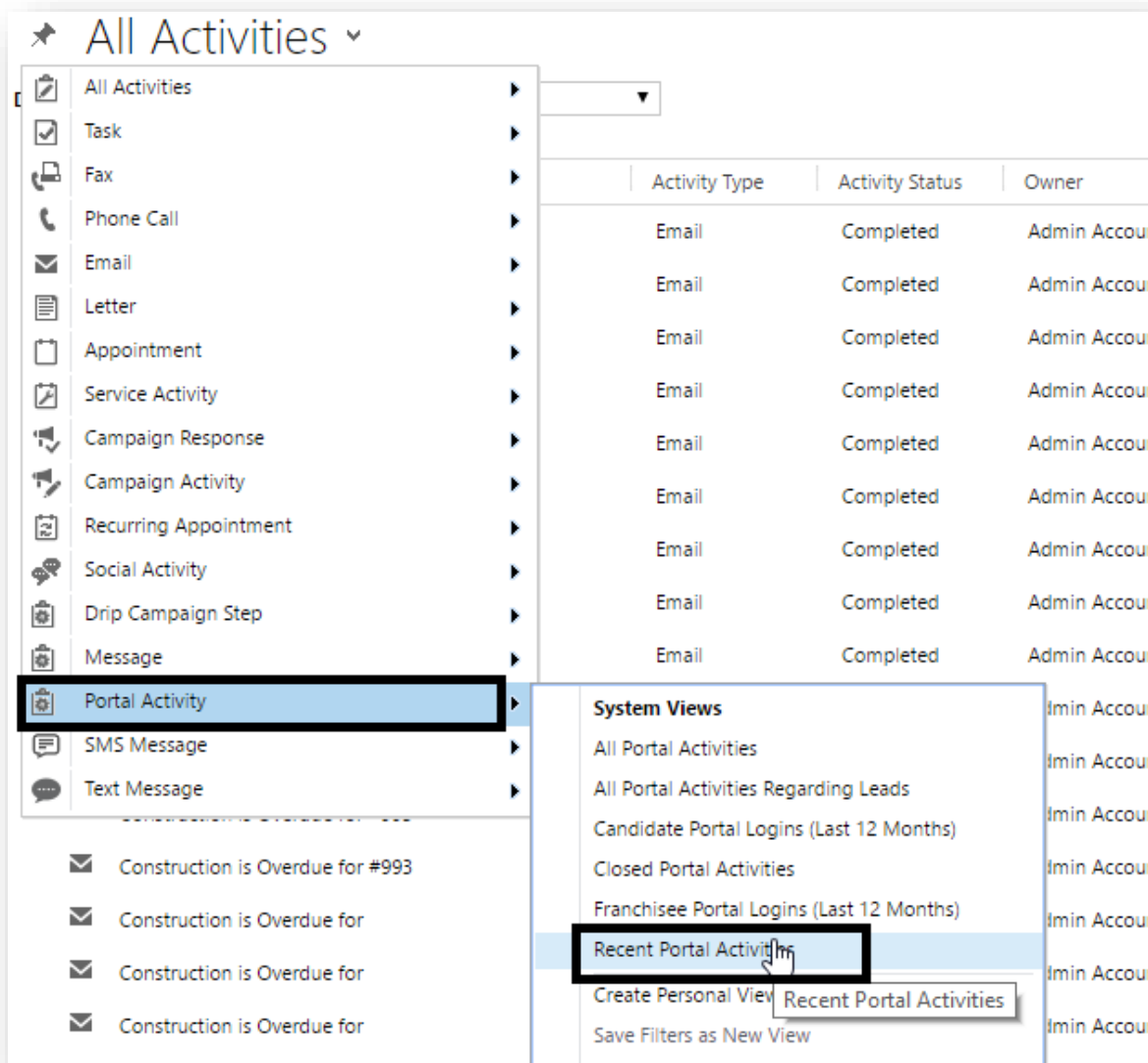




2. You may also access your customer analytics via **Activities** in the FRM ribbon:







2.1 From the **All Activities** drop-down, select **Portal Activity**; from here you can chose to see All Portal Activities or Recent Portal Activities:





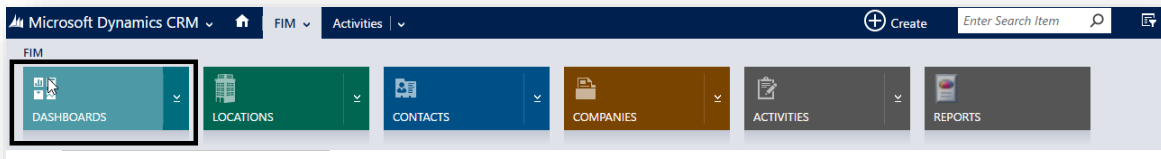
2.2 You will be able to track the pages viewed by a contact, the subject and the date of his activities:

All Portal Activities				Search for records
Due:	All			
✓ Portal Activity Type	Subject	Regarding	Date Created ↑	
View Page	Candidate Carl Ort (cort_3) viewed "http://demo-discovermoreabout-us.arkefrm.staging.wpengine.com/steppage/step-1/" page.	 Carl Ort	5/24/2016 8:10 PM	
View Page	Candidate Carl Ort (cort_3) viewed "http://demo-discovermoreabout-us.arkefrm.staging.wpengine.com/steppage/step-1/" page.	 Carl Ort	5/24/2016 8:03 PM	
View Page	Candidate Carl Ort (cort_1) viewed "http://localhost/cp/steppage/step-1-the-business-model/" page.	 Carl Ort	5/24/2016 6:41 PM	
View Page	Candidate Carl Ort (cort_1) viewed "http://localhost/cp/steppage/step-1-the-business-model/" page.	 Carl Ort	5/24/2016 6:40 PM	

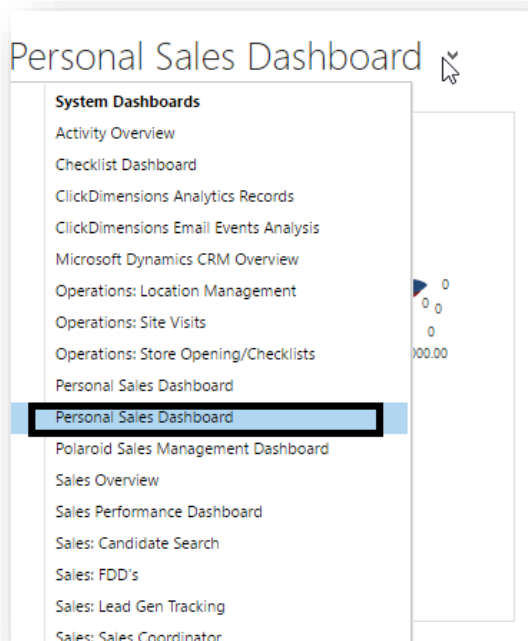


3 Via **Personal Sales Dashboard**:

3.1 From the ribbon select **FIM** and from the drop-down select **Dashboards**:



3.2 This will redirect you to your Personal Sales Dashboard page; if however this is not the case, select it from the drop-down:





3.3 Scroll down to see the **Recent Portal Activities** section:

1/26/2016 2:10 ...	Eric Stoll	New Location	Eric Stoll
12/29/2015 11:3...	Assign Logic Test 13	New Location	Assign Logic Test 13
12/22/2015 8:55...	Eaan Rainey	New Location	Eaan Rainey
1 - 8 of 19			
Recent Portal Activities ▾			
From	Portal Activity Type	Date Created ↑	Subject
Eric Stoll	Login	5/24/2016 11:56 AM	Logged In

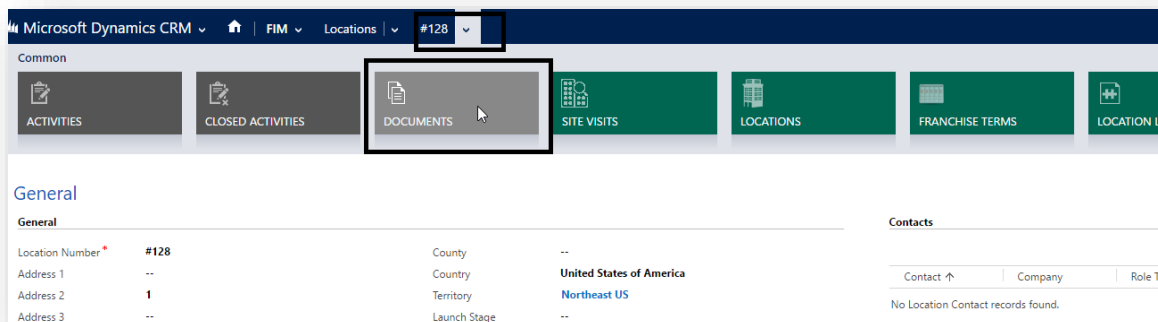
3.4 in order to get a full screen view of the activities, click on the icon in the right side of the page:

▾	+	
Portal Activity Type	Date Created ↑	Subject
	5/3/2016 7:54 AM	Logged In
	5/3/2016 7:50 AM	Logged In

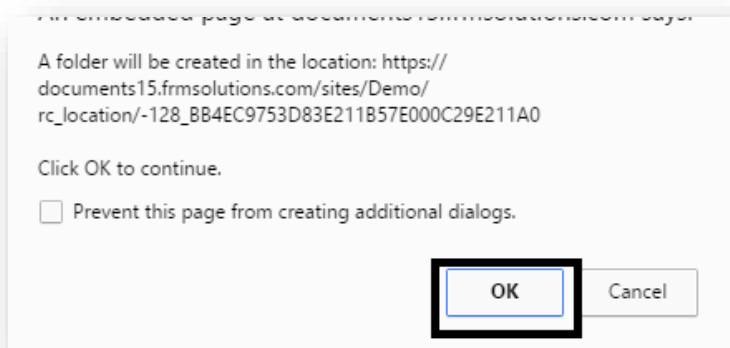


Upload Documents to a Location Record

1. Open the location where you want to upload the document
2. Click on the drop-down associated to this location and select the **Documents** Icon

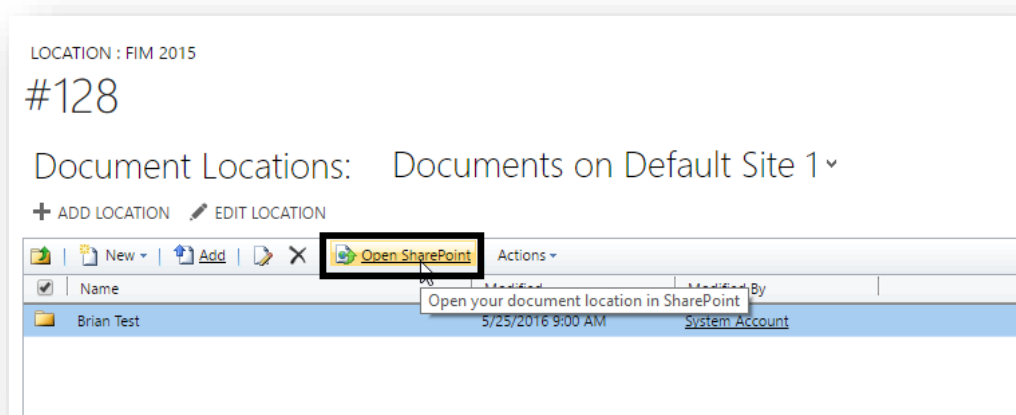


3. The first time you upload a document you will receive a pop-up message informing you that a folder will be created in the location; click OK to proceed:

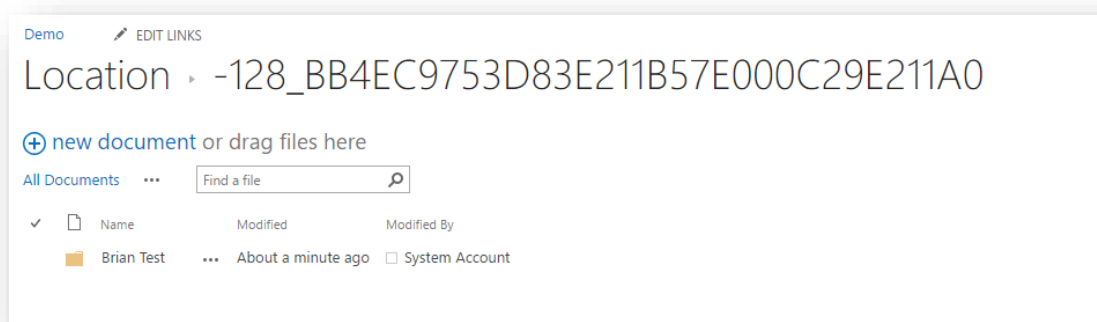




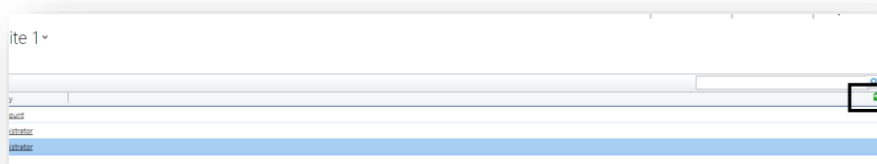
4. You have the option to open you document location in **SharePoint**:



5. In SharePoint, you can easily drag and drop the file/files you need to upload:



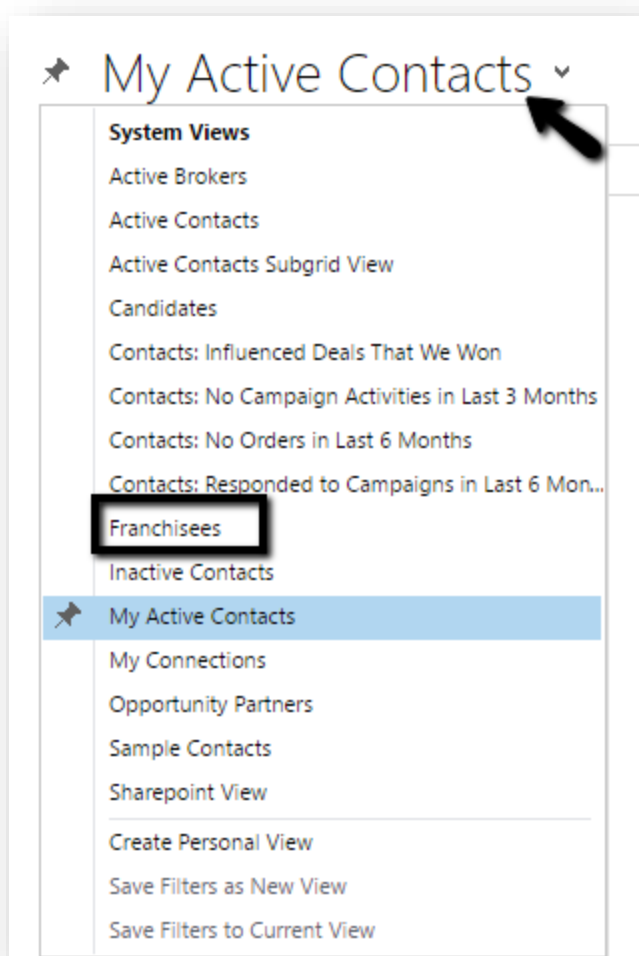
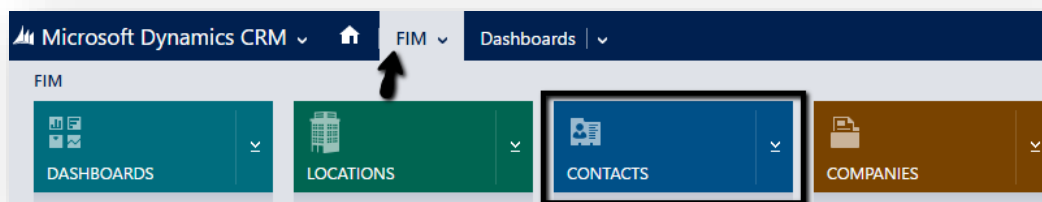
6. Close the SharePoint page and refresh the **Document Locations** page to verify that your files have been added (the refresh option is available in the upper right side of the page):





Invite Franchisee to Intranet

1. Navigate to Contacts & select the view “Franchisees”



2. Open the contact that you want to grant access to the Intranet;



3. You can verify the contact's access by selecting the **FRM Portal** form

CONTACT : CONTACT 2015 ▾

- Contact 2015
- Contact
- FRM Portal

Summary

CONTACT INFORMATION

Salutation	--
Full Name *	Assign Logic Test 13
Business Phone	--
Mobile Phone	--
Email *	test4@arke2.com
Address	United States of America
Description	--

It will show **Inactive** if the contact doesn't have access yet:

CONTACT : FRM PORTAL ▾

Dwayne Chapman

Email *	dwane@dwayne.com	Preferred Method of Contact	Any	Owner *	Admin Account
---------	------------------	-----------------------------	-----	---------	---------------

General

First Name +	Dwayne	Email *	dwane@dwayne.com
Last Name *	Chapman	Owner *	Admin Account

Portal

Username	Inactive	Password	--
Portal Access	No	Portal Administrator	No



4. Select Invite

SAVE SAVE & CLOSE ADD TO MARKETING LIST ASSIGN DELETE INVITE RESET PASSWORD ...

CONTACT : FRM PORTAL

Dwayne Chapman

Email* dwayne@dwane.com Preferred Method of Contact: Any Owner* Admin Account

General

First Name* Dwayne Email* dwayne@dwane.com

Last Name* Chapman Owner* Admin Account

5. In the pop-up window, you need to provide the setup credentials: **username** and **password** (you can choose to change the auto-generated password); click **Next**:

FRM - Setup Portal Access

Username

Enter the username (required)

Password

9u(\$*K5)

Tip

First initial and last name is the recommended naming convention

Click to add comments

Help Summary Next Cancel

6. The status of Portal Access will now get changed to **Active**:

General

First Name* Dwayne Email* dwayne@dwane.com

Last Name* Chapman Owner* Admin Account

Portal

Username dwayne Password chapman

Portal Access Active Portal Administrator No



7. You have the option to change the password by clicking on **Reset Password**:

SAVE SAVE & CLOSE ADD TO MARKETING LIST ASSIGN DELETE INVITE **RESET PASSWORD** ...

CONTACT : FRM PORTAL ▾

Dwayne Chapman

Email* dwayne@dwayne.com Preferred Method of Contact: Any Owner* Admin Account

Change Franchisee Intranet Username / Password

If you would like to update a contact's username and/or password you may do so by following the steps outlined in the "Invite Franchisee to Intranet" section. Continue through the process and when you arrive at the screen below input the new username and/or password

FRM - Setup Portal Access

Username

Enter the username (required)

Password 9u(\$*K5)

Tip First initial and last name is the recommended naming convention

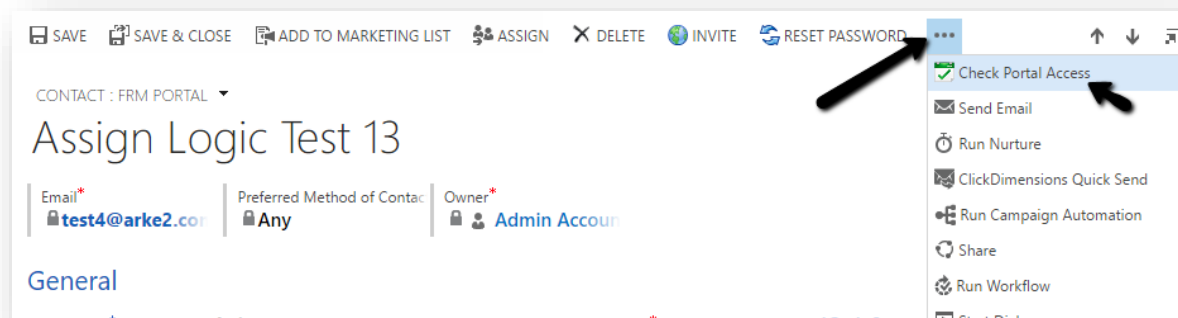
Click to add comments

Help Summary **Next** Cancel



Validating Portal Access

You may also validate a user's access to the Franchisee Portal by selecting the ellipses and clicking **Check Portal Access** where indicated in the below screenshot.



You will then be provided a summary of the issues on the contact record as indicated below. All of the issues listed will need to be addressed to grant Portal access.

