FRM Solutions, Inc

Franchise Information Manager (FIM)

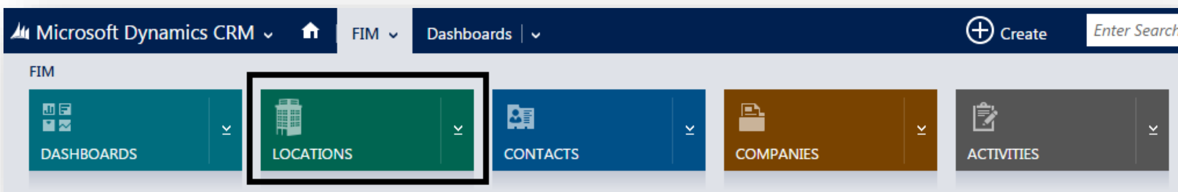
Updated 06/30/2016

Contents

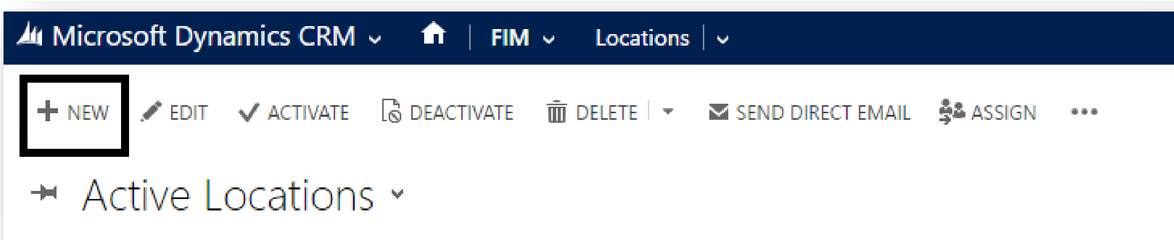
Open / Close Location

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.

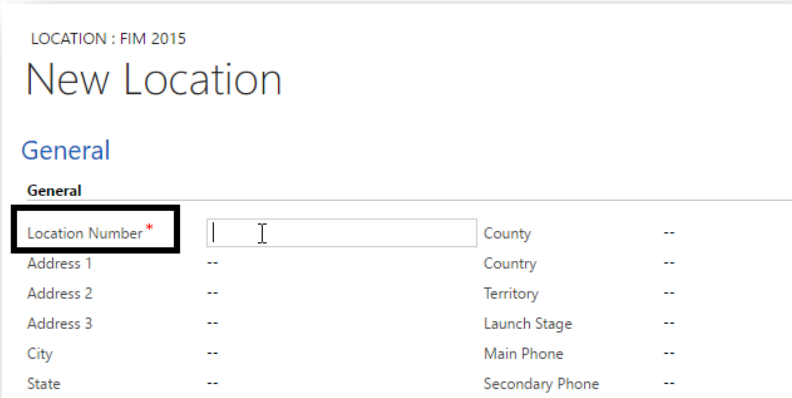
1. Go to **FIM** module and from the drop-down select **Locations**:



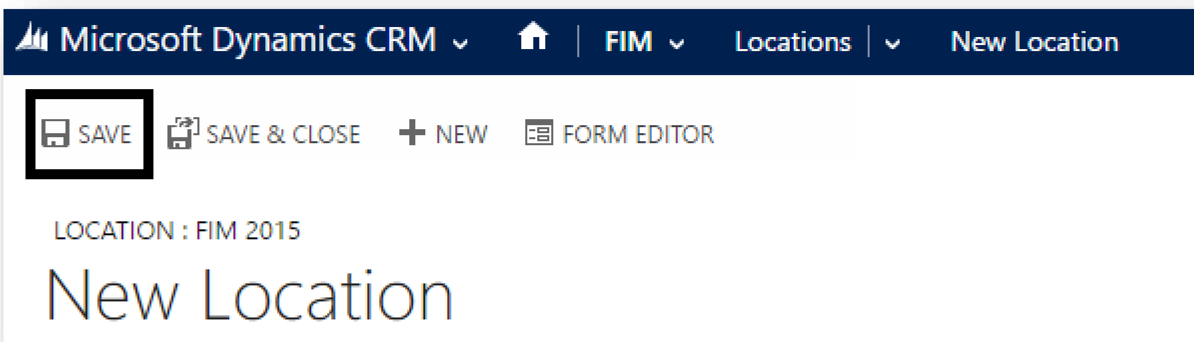
2. To create a new location, click on **New** option:



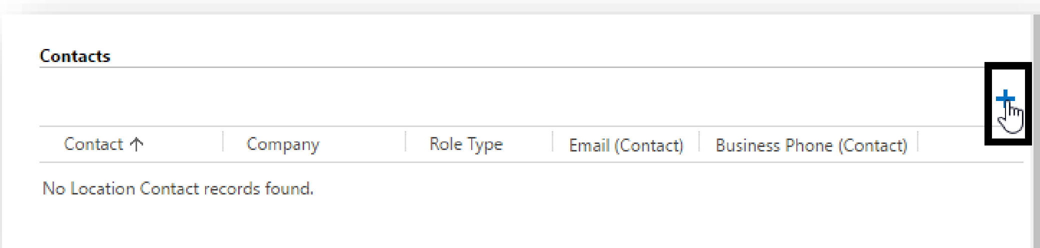
3. Enter the **number** or **name** of the location (mandatory field); you can also add the information that you find relevant in the other fields:



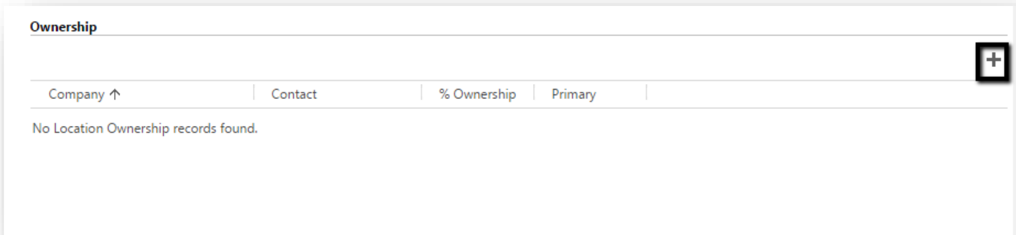
4. After adding the necessary information, click on **Save** option:



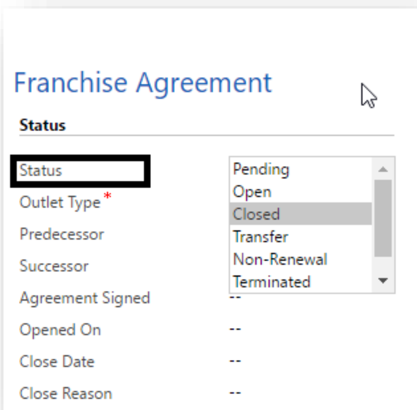
5. After you have saved the information added, you will be able to add contacts related to the locations:



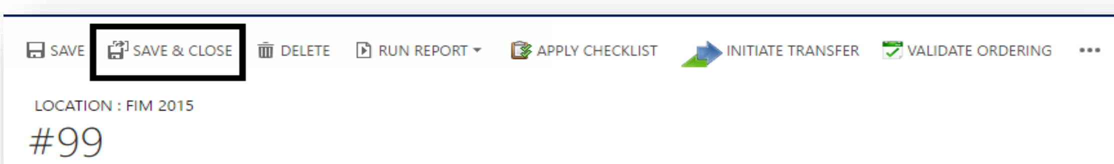
6. After adding your contacts assign Location ownership records following a similar process as #5 above.



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

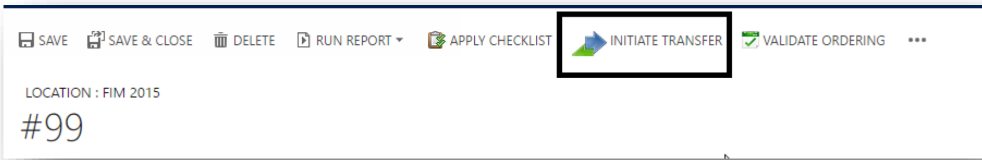


8. "**Save and Close**" after you have finished updating the location.

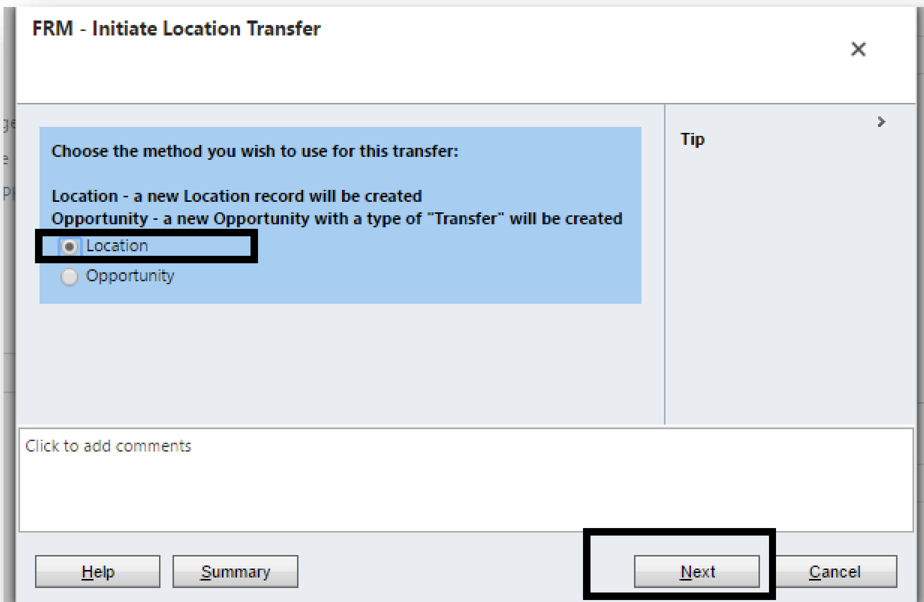


Transfer Location

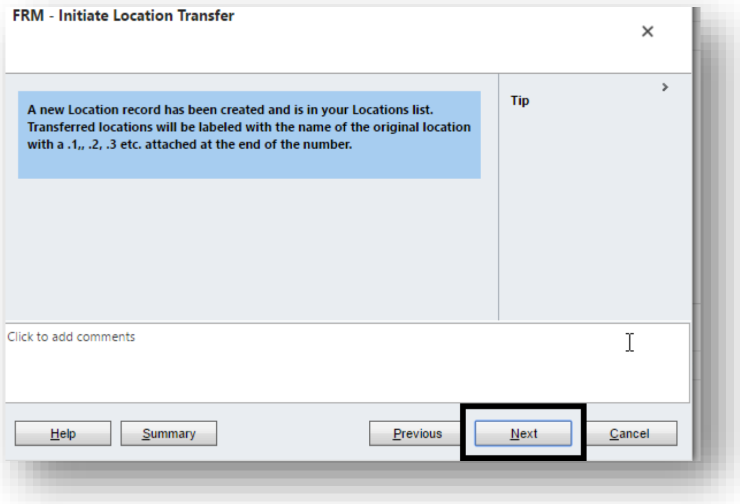
1. Open the location and from the menu at the top of the page select **Initiate Transfer**:



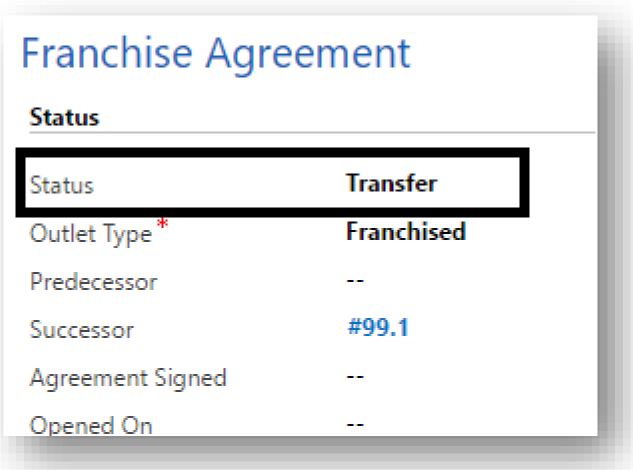
2. In the pop-up page, you have the option to choose if you want to create a new location or an opportunity; To create a new location select **Location** and then click on **Next**. Your may also select **Opportunity** if you anticipate a transfer. This will not create a new location but instead an opportunity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



3. 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.



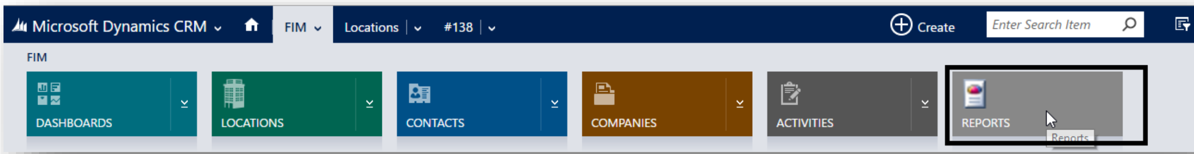
4. The transfer does not make any changes to the original location; you can verify both the original and the new locations in your **Active Locations** list; the status for the transferred location will be **Pending**.
5. You can change the status of your predecessor location to **Transfer** from the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



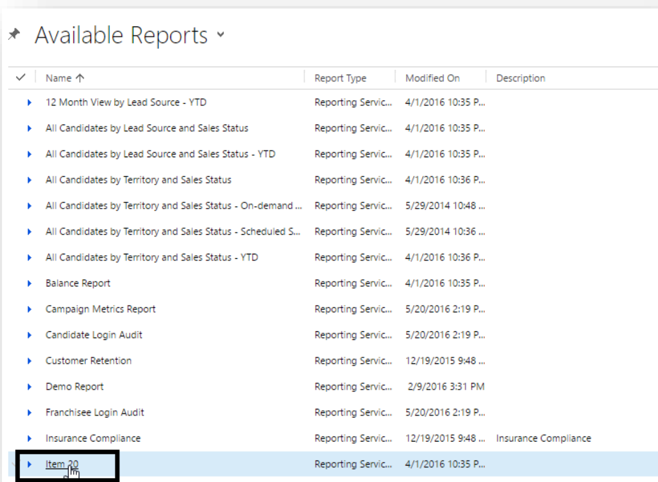
Produce Item 20 Report

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).

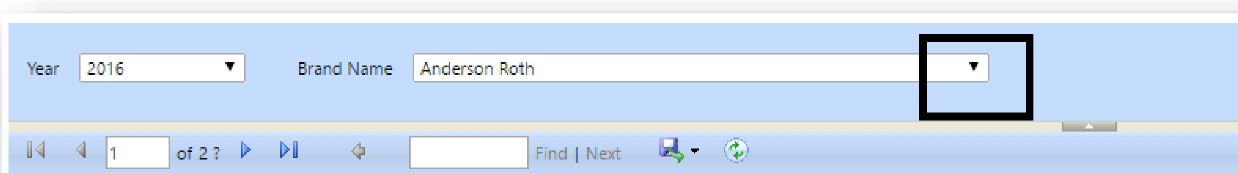
1. Go to **FIM** icon and from the Drop-Down select **Reports**:



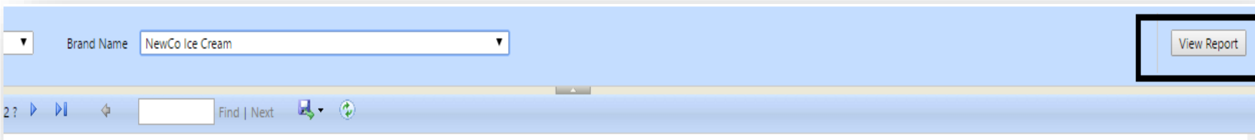
2. From the **Available Reports** list select **Item 20** and click **Run Report** at the top of your screen:



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

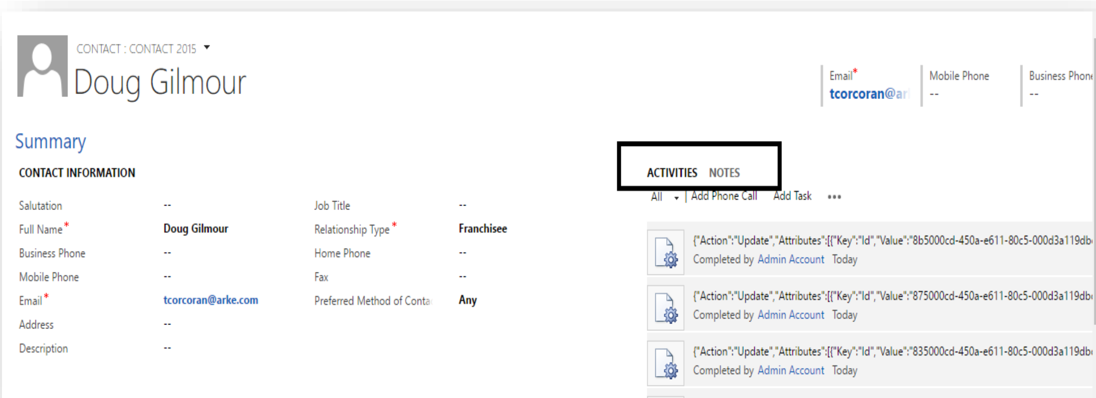
If you purchase Intranet or a Candidate Portal you will be able to track activities made by your franchisees/candidates.

You can access this information using different methods:

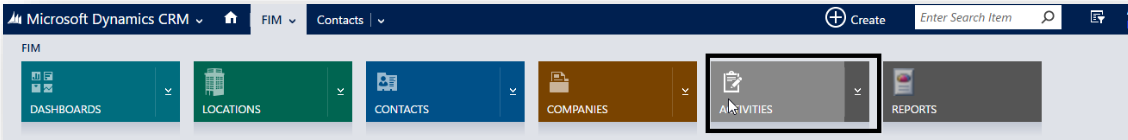
1. Select **Contact** from the ribbon

1.1 Go to a contact you would like to review and double click/open the record

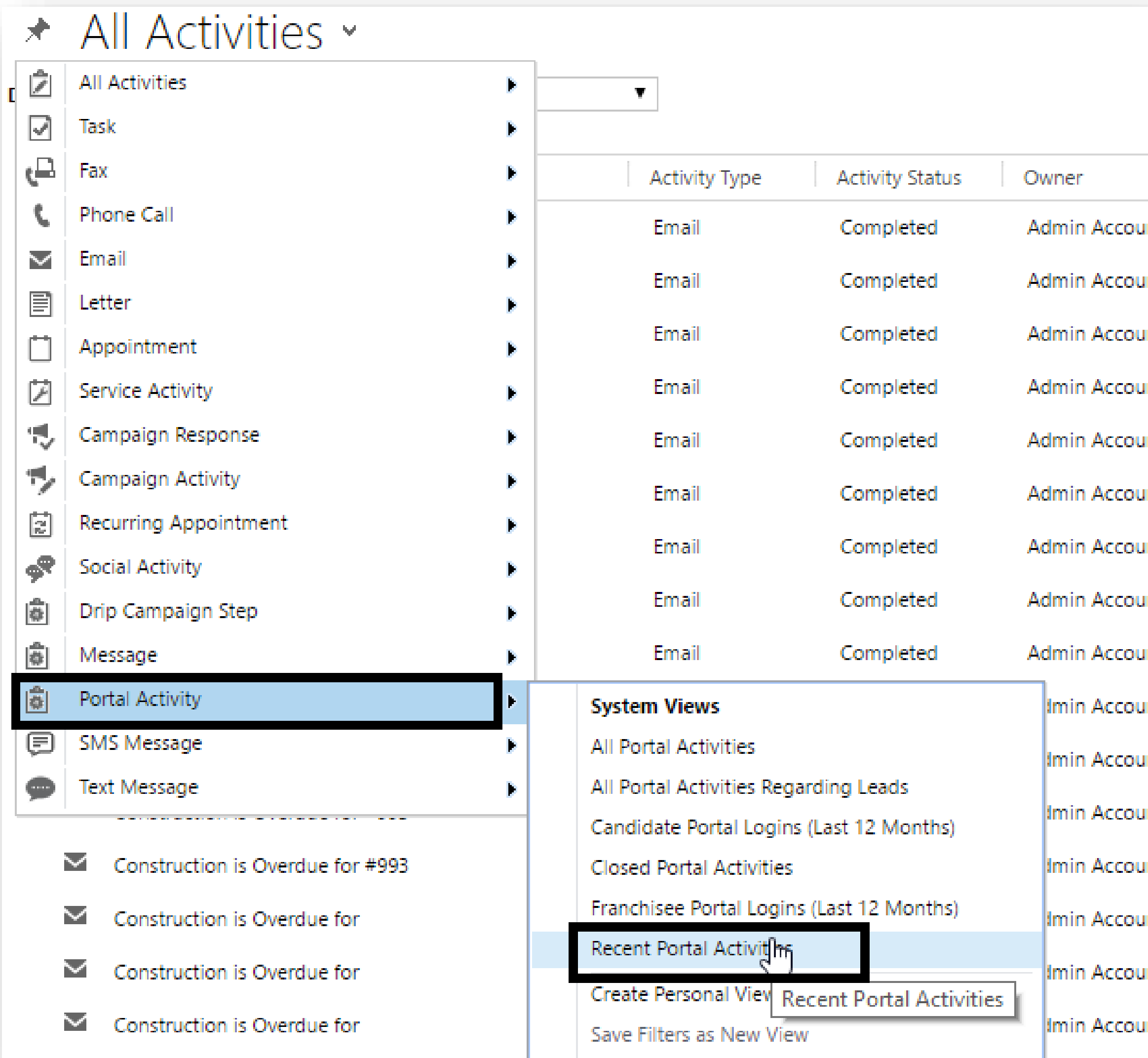
1.2 In the right side of the page you will find the list of **Activities** for this contact



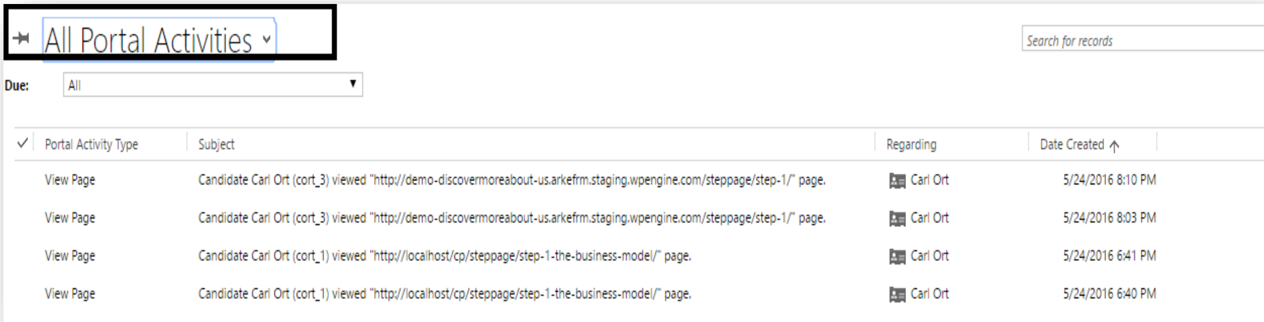
2. You may also access your customer analytics via **Activities** in the FRM ribbon:



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:

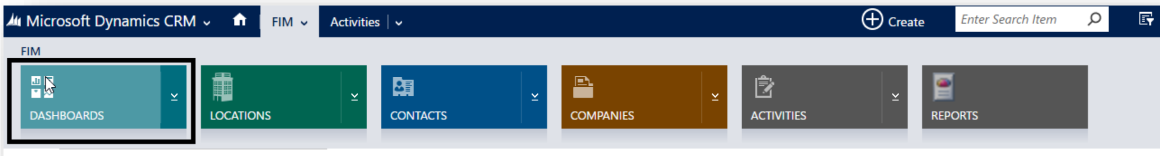


2.2 You will be able to track the pages viewed by a contact, the subject and the date of his activities:

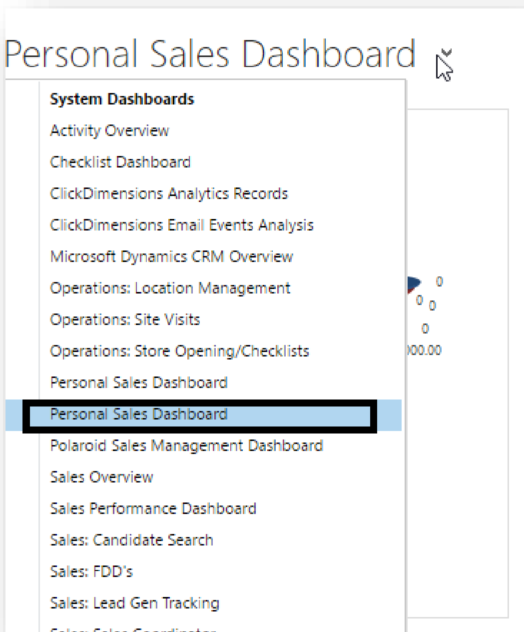


3 Via **Personal Sales Dashboard:**

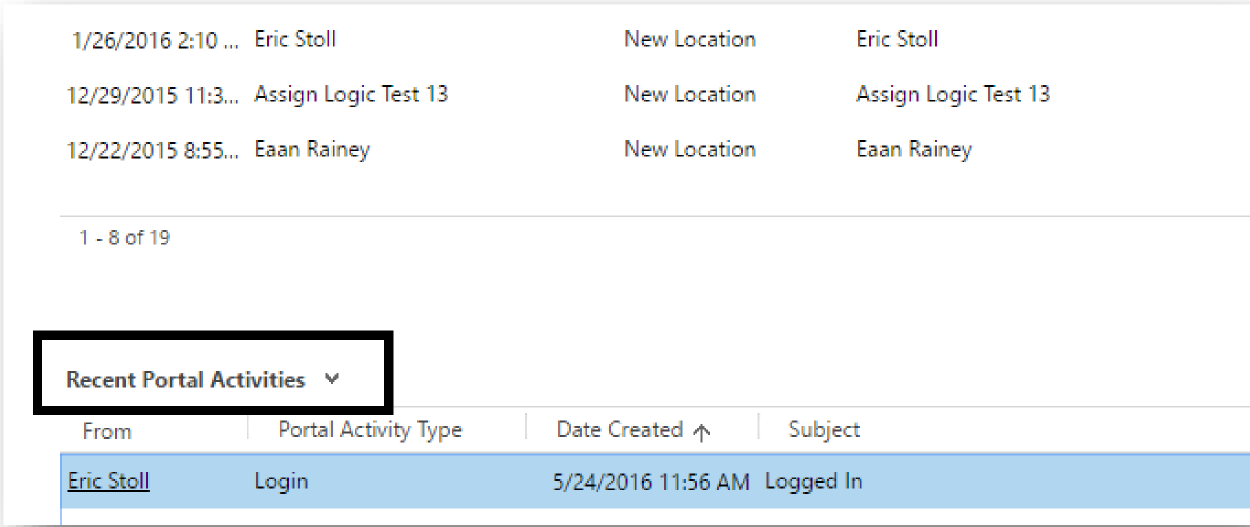
3.1 From the ribbon select **FIM** and from the drop-down select **Dashboards**:



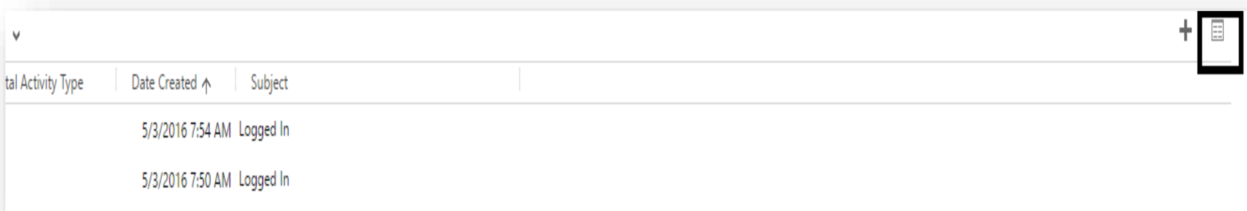
3.2 This will redirect you to your Personal Sales Dashboard page; if however this is not the case, select it from the drop-down:



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

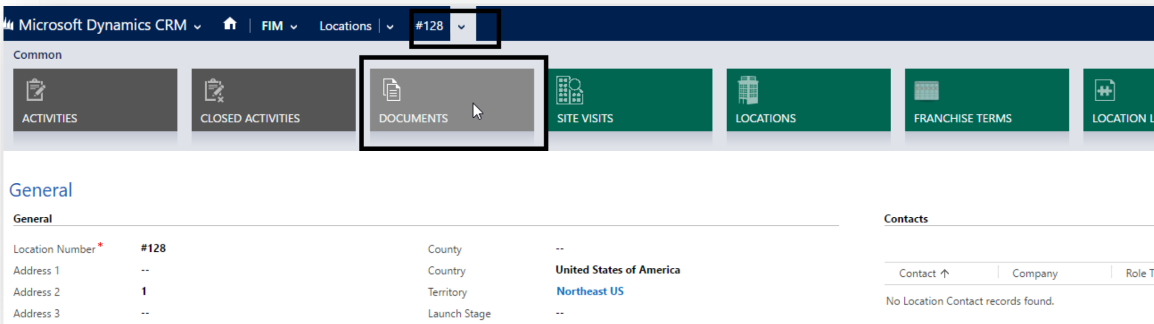


3.4 in order to get a full screen view of the activities, click on the icon in the right side of the page:

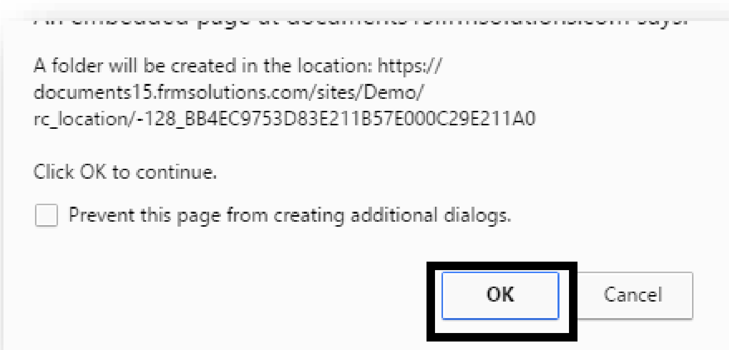


Upload Documents to a Location Record

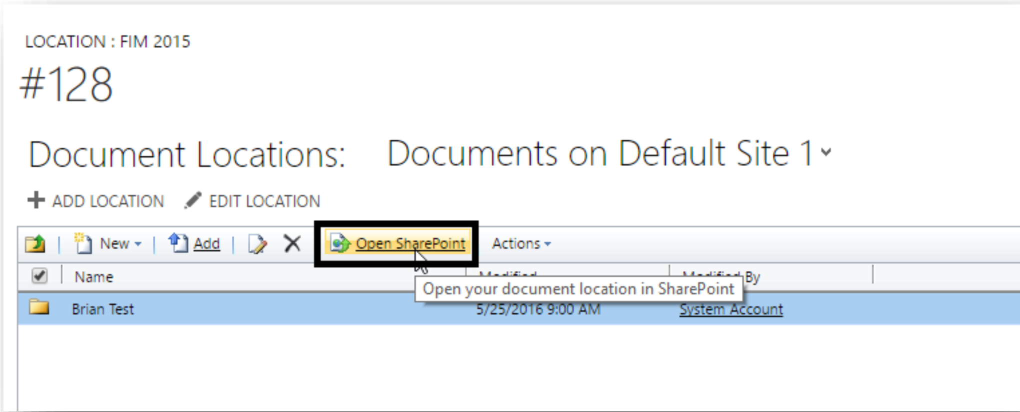
1. Open the location where you want to upload the document
2. Click on the drop-down associated to this location and select the **Documents** Icon



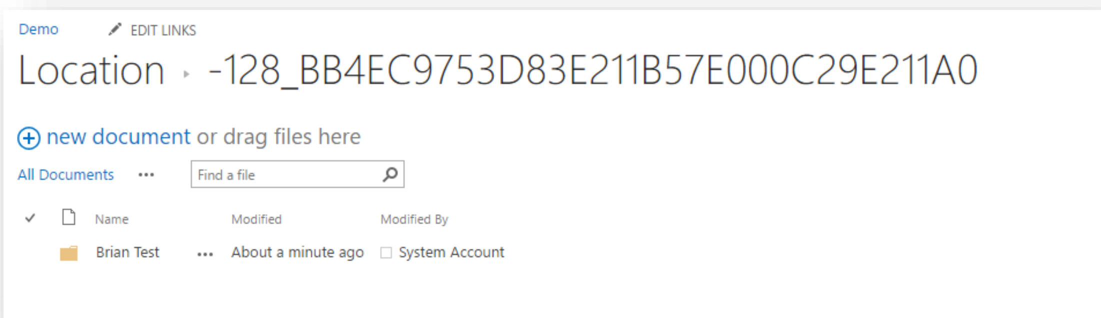
3. The first time you upload a document you will receive a pop-up message informing you that a folder will be created in the location; click OK to proceed:



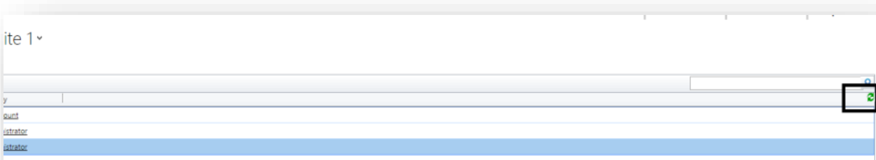
4. You have the option to open you document location in **SharePoint**:



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

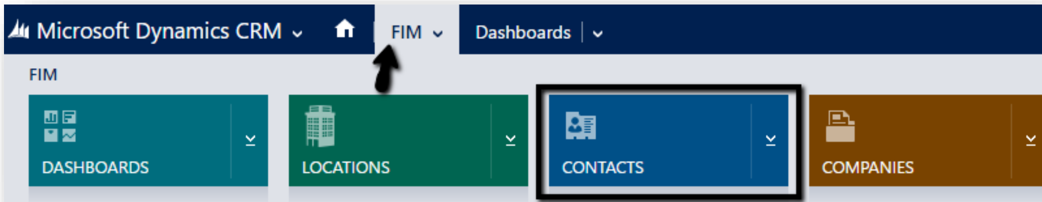


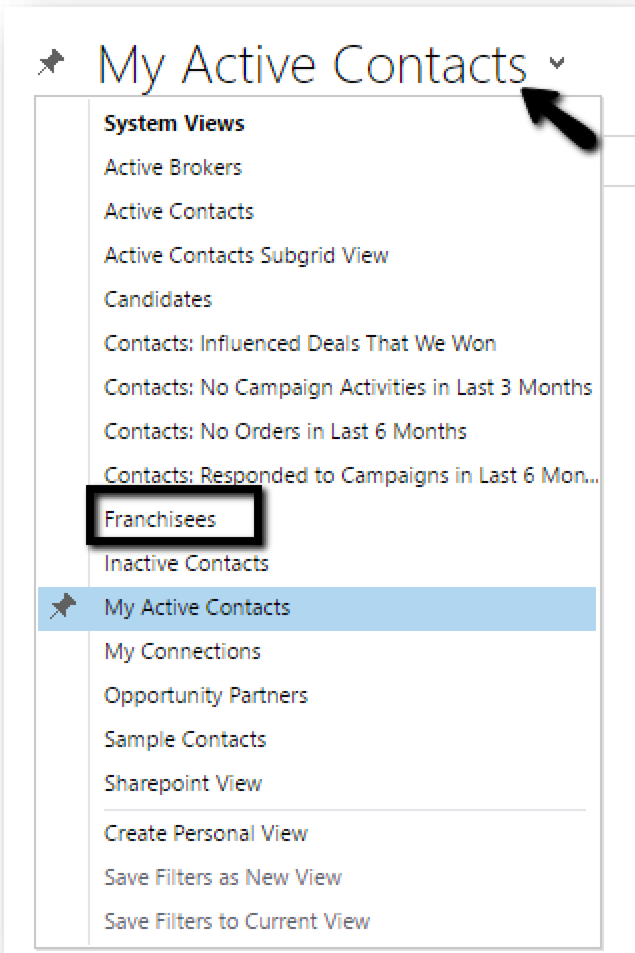
6. Close the SharePoint page and refresh the **Document Locations** page to verify that your files have been added (the refresh option is available in the upper right side of the page):



Invite Franchisee to Intranet

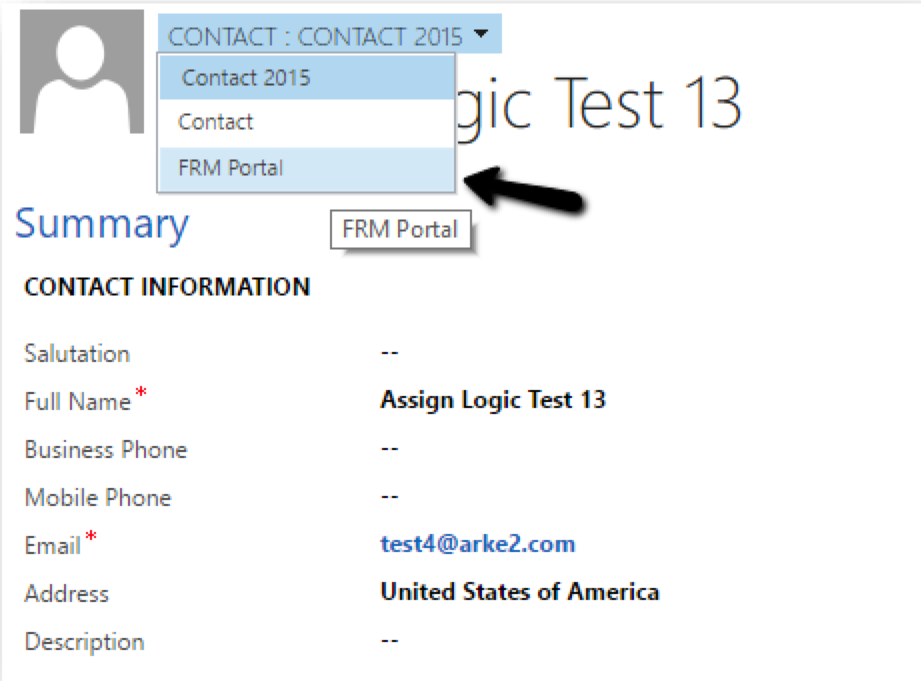
1. Navigate to Contacts & select the view "Franchisees"



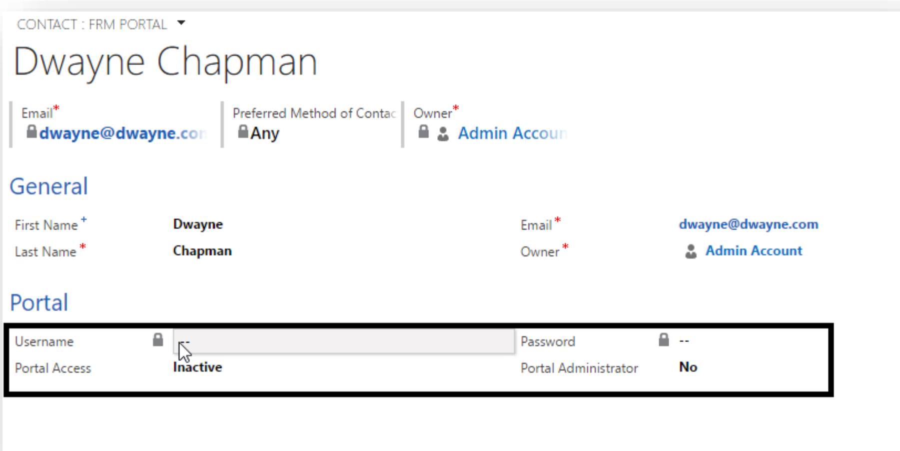


2. Open the contact that you want to grant access to the Intranet;

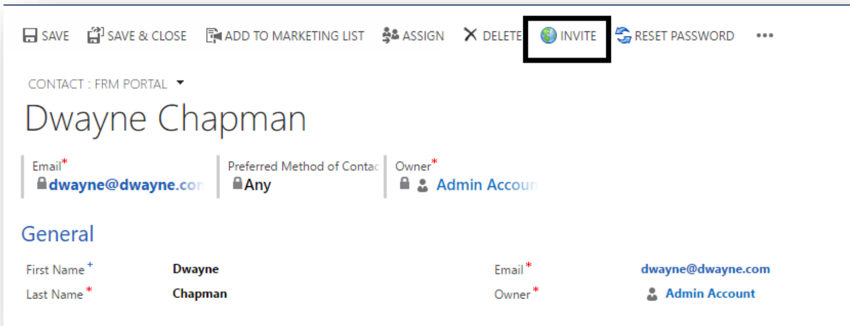
3. You can verify the contact's access by selecting the **FRM Portal** form



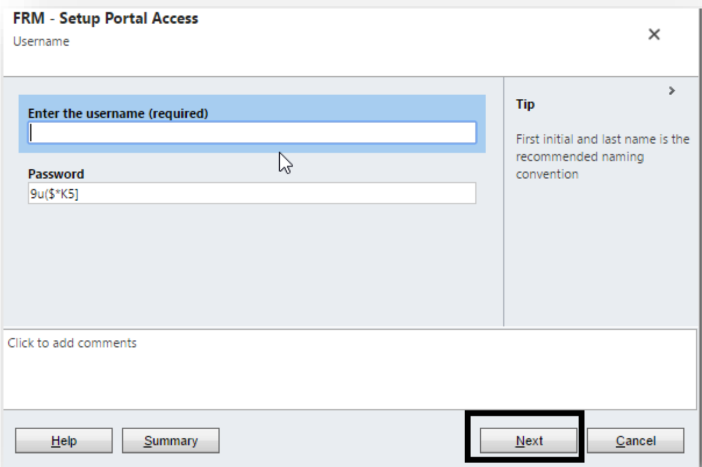
It will show **Inactive** if the contact doesn't have access yet:



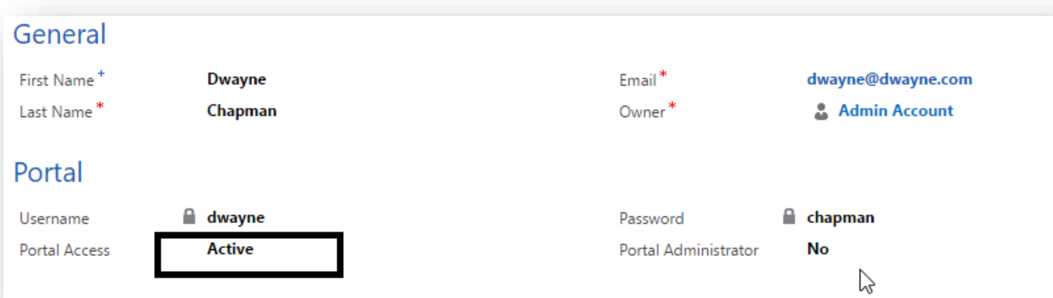
4. Select **Invite**



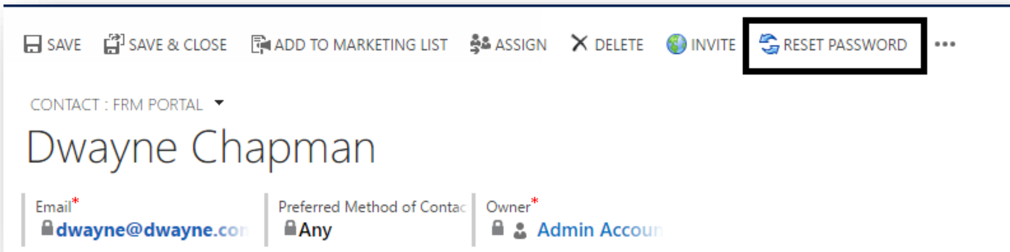
5. In the pop-up window, you need to provide the setup credentials: **username** and **password** (you can choose to change the auto-generated password); click **Next**:



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

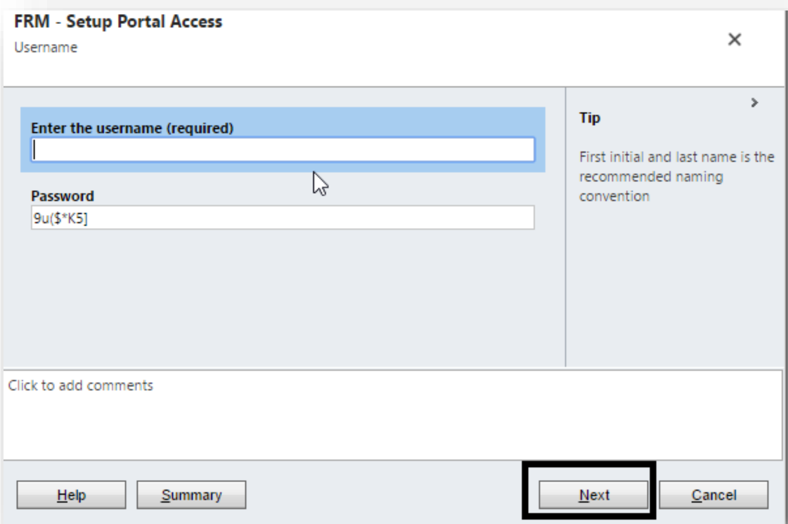


7. You have the option to change the password by clicking on **Reset Password**:



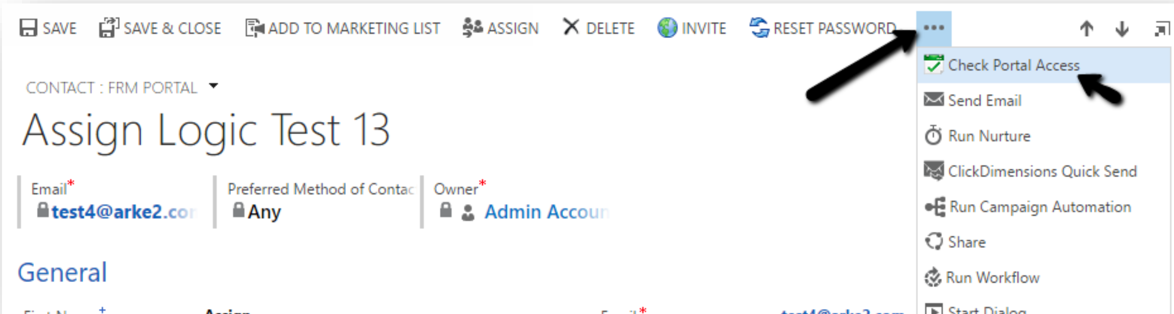
Change Franchisee Intranet Username / Password

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



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.