

FRM Solutions, LLC

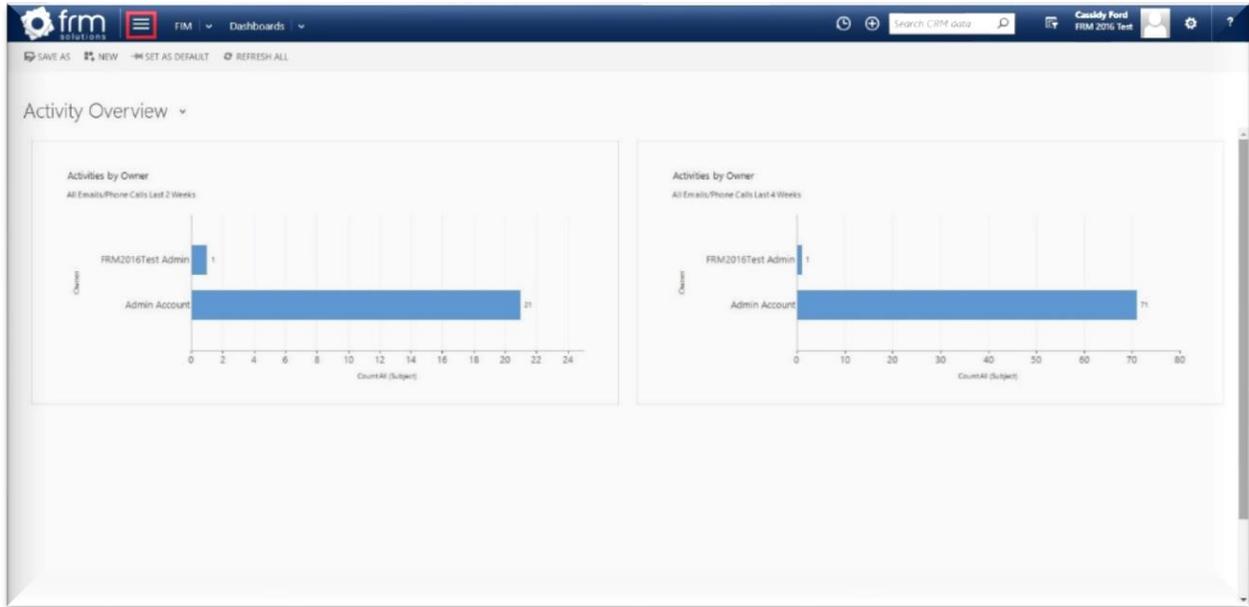
FRM User Management Guide

Updated 11/07/19

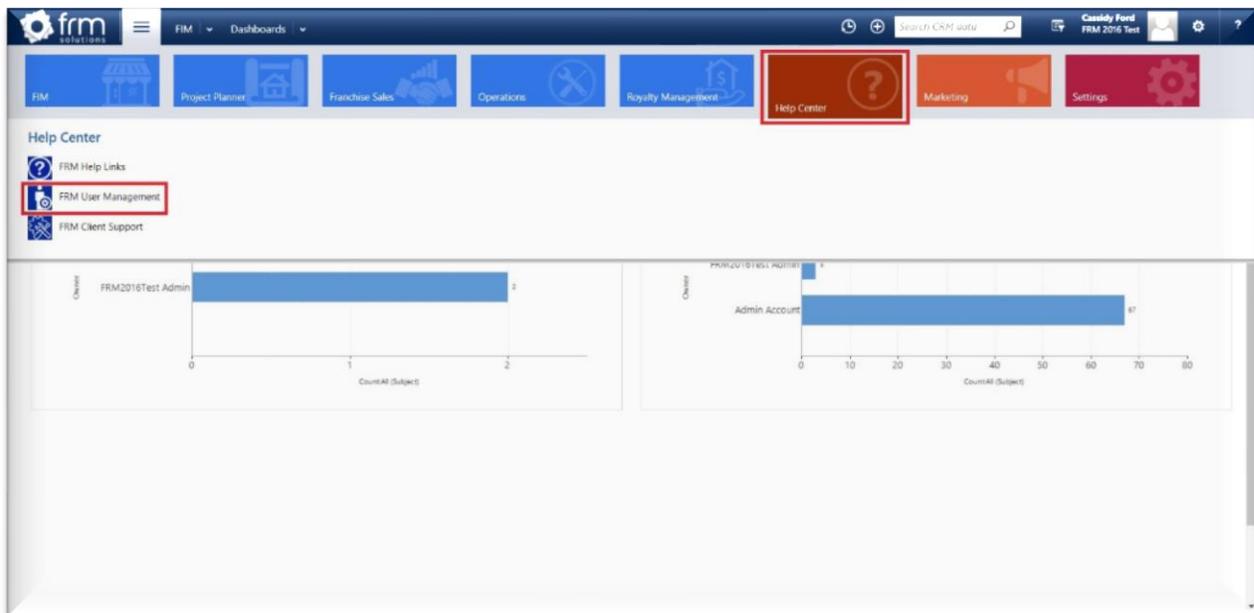


FRM User Management is based within FRM and allows you to easily add or disable team members, edit security roles, manage passwords and more. You can easily access FRM User Management regardless of which module or screen you happen to be in.

To get started, click the three lines on the left-hand side of the ribbon at the top of your screen.

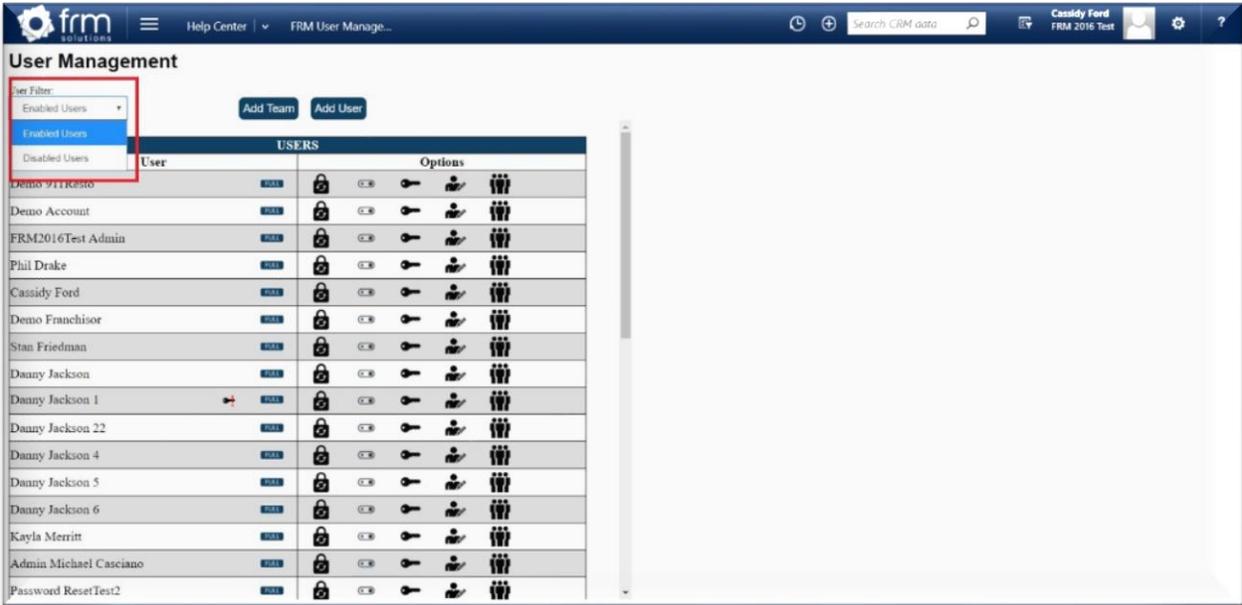


Find the “Help Center” tile, then click on “FRM User Management” in the drop-down menu. It is important to remember to navigate through FRM User Management using the dedicated navigation buttons, rather than hitting the “back” arrow on your internet browser.

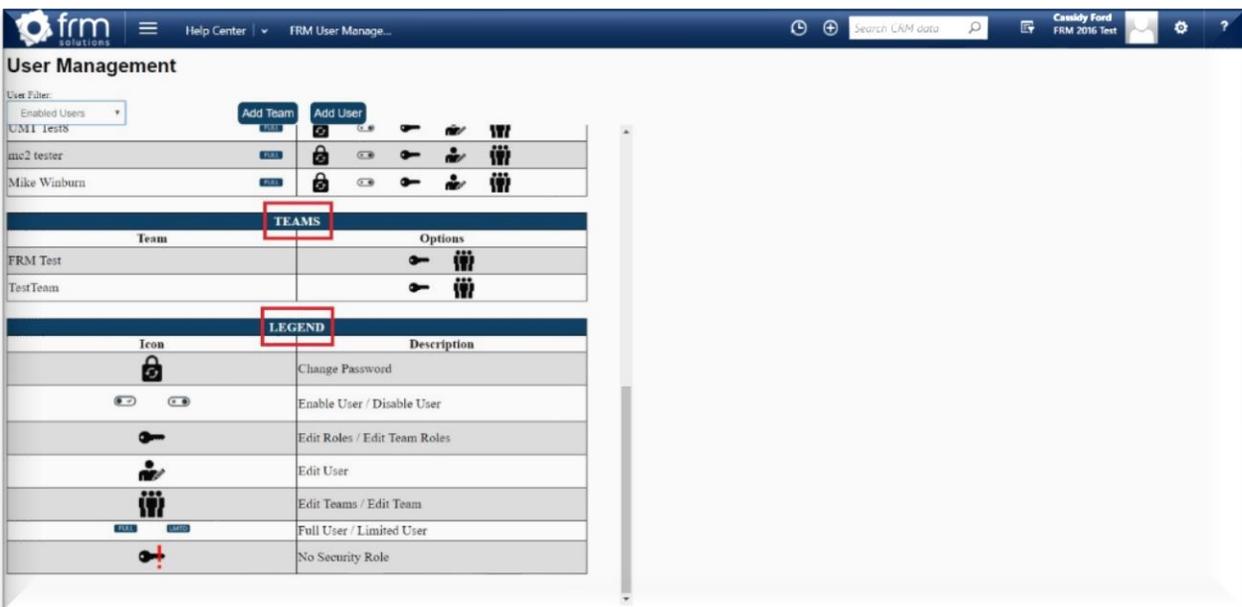




The default view is set to “Enabled Users,” but you can use the drop-down menu to change the view to “Disabled Users.” There are two columns below the drop-down menu. On the left is a list of your organization’s users, along with a symbol indicating the user’s full or limited access level. The right column contains options for various actions, also indicated by distinct symbols.



To view your current teams and edit team roles, scroll down to the “Teams” section below the list of users. A “Legend” at the bottom of the page describes the symbols designated for each indicator or available action item. Hovering over an icon will cause a “tooltip” to appear with an explanation of what the icon does.





- 🔒 Clicking the lock icon will allow you to change a user's password. Passwords must be at least 8 characters long and contain 3 of the following: uppercase letters, lowercase letters, numeric characters and special characters.

The screenshot shows the 'User Management' interface with a table of users. A modal dialog box titled 'Reset Password for Cassidy Ford' is open over the user 'Cassidy Ford'. The dialog contains a text input field for the password, a checkbox for 'Display Password', and a checkbox for 'User must change password at next login'. At the bottom are 'Change Password' and 'Cancel' buttons.

User	Options
Demo 911Resto	🔒 🔑 🗑️
Demo Account	🔒 🔑 🗑️
FRM2016Test Admin	🔒 🔑 🗑️
Phil Drake	🔒 🔑 🗑️
Cassidy Ford	🔒 🔑 🗑️
Demo Franchisor	🔒 🔑 🗑️
Stan Friedman	🔒 🔑 🗑️
Danny Jackson	🔒 🔑 🗑️
Danny Jackson 1	🔒 🔑 🗑️
Danny Jackson 22	🔒 🔑 🗑️
Danny Jackson 4	🔒 🔑 🗑️
Danny Jackson 5	🔒 🔑 🗑️
Danny Jackson 6	🔒 🔑 🗑️
Kayla Merritt	🔒 🔑 🗑️
Admin Michael Casciano	🔒 🔑 🗑️
Password ResetTest2	🔒 🔑 🗑️

- 🔓 Click the toggle icon to enable or disable a user. You'll be asked to confirm the change before it is completed.

The screenshot shows the 'User Management' interface with a table of users. A modal dialog box titled 'Are you sure?' is open over the user 'Cassidy Ford'. The dialog contains a warning icon, the text 'The user Cassidy Ford will be disabled.', and 'Yes' and 'Cancel' buttons.

User	Options
Demo 911Resto	🔒 🔑 🗑️
Demo Account	🔒 🔑 🗑️
FRM2016Test Admin	🔒 🔑 🗑️
Phil Drake	🔒 🔑 🗑️
Cassidy Ford	🔒 🔑 🗑️
Cassidy Ford 1	🔒 🔑 🗑️
Demo Franchisor	🔒 🔑 🗑️
Stan Friedman	🔒 🔑 🗑️
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Admin Michael Casciano	🔒 🔑 🗑️
Password ResetTest2	🔒 🔑 🗑️
UMT Test15	🔒 🔑 🗑️



🔑 The key icon is one of the most frequently used. Hit this button to edit a user's role permissions. Check the boxes next to the appropriate permissions, then select "Update Roles." In the "Teams" section, hitting the key icon allows you to edit the role permissions of an entire team of users

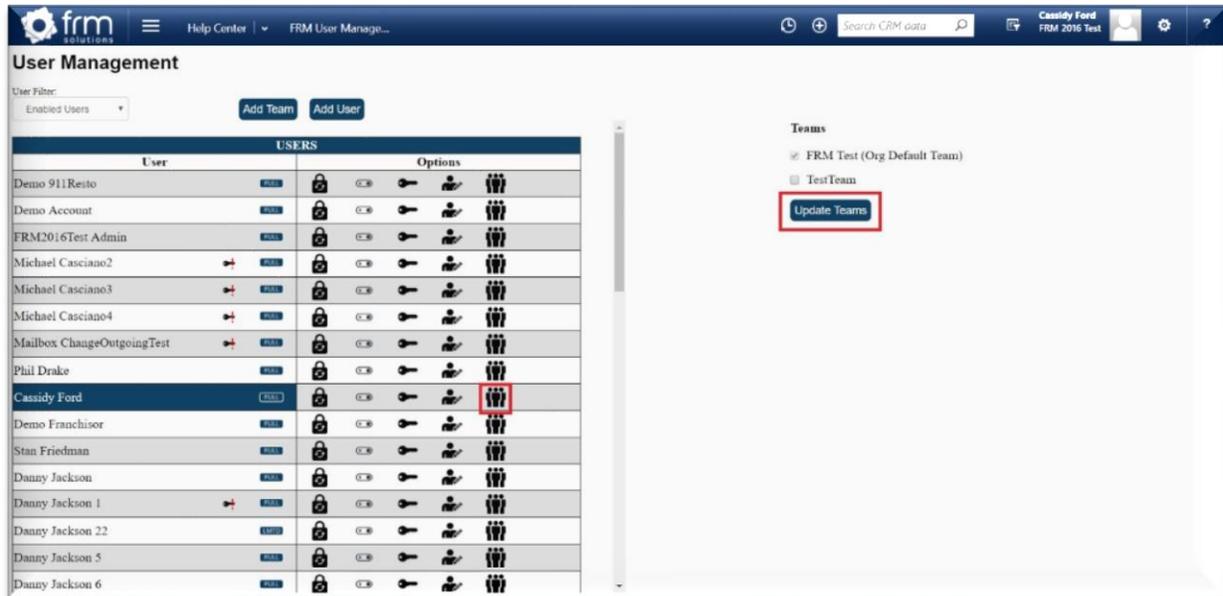
The screenshot shows the 'User Management' interface. On the right side, there is a 'Security Roles' section with a list of roles and checkboxes. The 'Update Roles' button at the bottom of this section is highlighted with a red box. The main table on the left shows a list of users with various icons, including a key icon for editing roles.

👤 To edit a user's profile, find the icon of the standalone person. Here you can edit first and last name, email address, user name, license type and business unit. You can also assign 'full' or 'limited' access to a user here.

The screenshot shows the 'User Management' interface with the 'Details' section for a user. The 'License Type' dropdown menu is highlighted with a red box. The main table on the left shows a list of users with various icons, including a standalone person icon for editing user profiles.

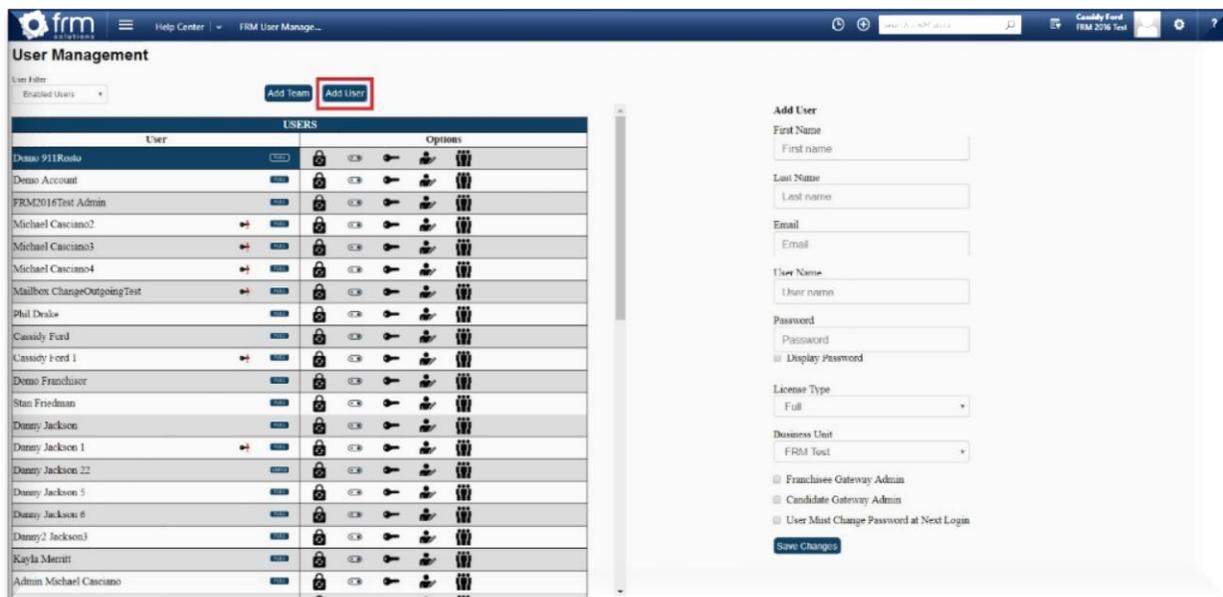


 To update a team a particular user belongs to, you'll navigate to a selection menu by hitting the symbol that looks like a group of people. Choose which team(s) you want this user to belong to, and hit the update button. In the "Teams" section, the group icon gives you access to change the team name.



The screenshot shows the FRM User Management interface. On the left, there is a table of users with columns for 'User' and 'Options'. The 'Options' column contains several icons, including a group of people icon. The 'Cassidy Ford' row is highlighted, and its group icon is circled in red. On the right, there is a 'Teams' section with a list of teams: 'FRM Test (Org Default Team)' and 'Test Team'. Below the list is an 'Update Teams' button, which is also circled in red.

Adding and disabling teams or users is possible by clicking the corresponding buttons located above the columned tables. When you select "Add User," you will be prompted to complete the new user's information. Each user must have a unique email address and username associated with his/her account.



The screenshot shows the FRM User Management interface with the 'Add User' form open. The 'Add User' button is circled in red. The form contains the following fields: First Name, Last Name, Email, User Name, Password, License Type (Full), Business Unit (FRM Test), and checkboxes for 'Franchisee Gateway Admin', 'Candidate Gateway Admin', and 'User Must Change Password at Next Login'. A 'Save Changes' button is at the bottom of the form.