

FRM Solutions, Inc

Franchise Sales

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Contents

Introduction to Leads & Opportunities.....	3
Updating Opportunity Sales Stage.....	5
Updating Leads/Opportunities as Won, Lost or On Hold	7
Sending an FDD	12
Publishing a New/Updated FDD	15
FDD Process – Candidate/Contact	15
Reviewing Status’ of Sent FDD’s / Download Signed FDD	16
Update Lead Auto-Reply Email	17
Configure/Update Candidate Portal Invitation Email	22
Configure Drip Campaign.....	24
Configure Lead Reassignment	28
Lock & Unlock Candidate Portal Content.....	30
Automatically Unlock Candidate Portal Content by Sales Stage	31
Edit FDD Email Template	33
Candidate Portal Analytics.....	36
Assign Lead/Opportunity to another User.....	40
Using Advanced Find to query Leads / Opportunities and reassign based on criteria	42
Invite Contact to Candidate Portal	45
Reset Contact’s Candidate Portal Password	47
Change Contact’s Candidate Portal Username	48



Introduction to Leads & Opportunities

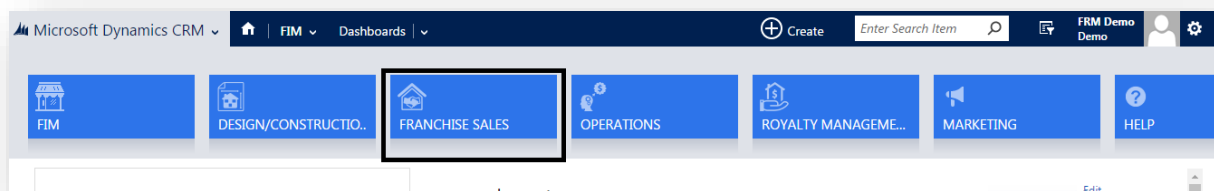
Leads - Represent any inquiry submitted from somebody interested in opening a franchise location.

Microsoft Dynamics CRM is used to facilitate the capture and storage of data for that lead. For instance, if your company receives an inquiry on your website contact form about opening a franchise location, you would use a Dynamics CRM lead record to collect and store information about that person or business.

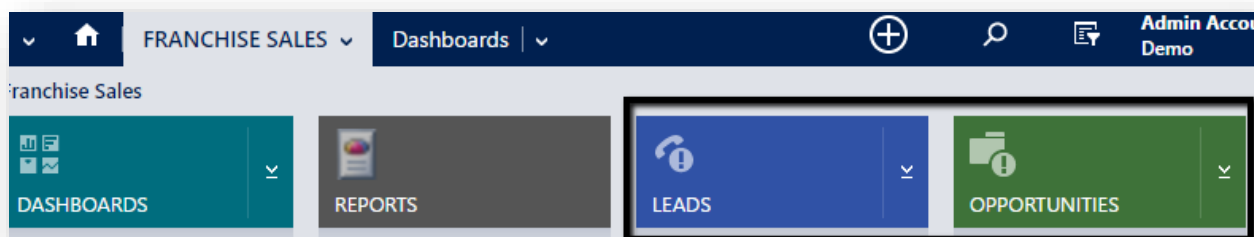
Opportunities - Opportunities in Microsoft Dynamics CRM are the core record in the sales process. Used by the sales team, opportunities represent a potential sale to a specific prospect or lead. The creation of an opportunity adds this potential sale to the sales pipeline and therefore puts it on the radar of the sales manager who may be holding the team responsible for the progress of opportunities. If purchased, the FRM Candidate portal will serve the purpose of providing a digital landscape for the prospect to move through as the progress through each Sales Stage.

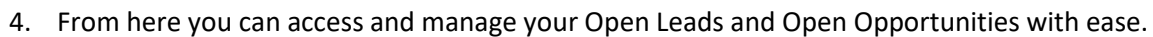
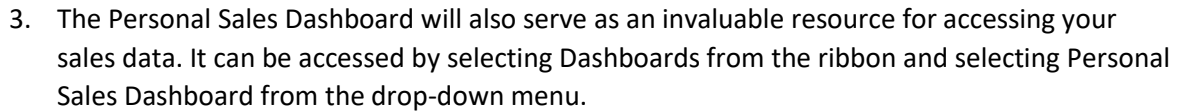
Step by Step Process on how to identify Leads and Opportunities in FRM

1. From the main page select Microsoft Dynamic CRM and Franchise Sales from the ribbon;



2. Leads and Opportunities can be accessed from the Lead and Opportunity Tiles indicated below:







Updating Opportunity Sales Stage

Sales representatives can update the progress of their opportunities by changing the Opportunity Sales Stage once a new action is taken on the opportunity (e.g. sending emails, setting up a new contact point, sending an FDD). Updating the Sales Stage on an opportunity accordingly to these actions will ensure a more organized and efficient process.

An example of Opportunity Sales Stages in FRM are below:

- 2 - Application Sent
- 3 - Application Received
- 4 - Marketing Material
- 5 - FDD Sent
- 6 - FDD Review
- 7 - Validation
- 8 - Discovery Day
- 9 – Franchising Package Sent
- 10 - Agreements Sent

Step by Step Process on how to update Opportunity Sales Stage

1. You may update an Opportunity's Sales Stage by first selecting it from your Personal Sales Dashboard or by accessing Opportunities in the FRM Ribbon.

From Personal Sales Dashboard:

My Open Opportunities ▾		Search for records				
Created On ↑	Topic	Type	Primary Contact	Est. Close Date	Stage	Status Reason
3/29/2016 5:23 ...	John Doe	New Location	John Doe		4 - Marketing M...	In Progress
3/29/2016 5:18 ...	Brian Craig	New Location	Brian Craig		5 - FDD Sent	In Progress



2. The Opportunity Sales Stage can be updated from 2 locations as indicated below:

OPPORTUNITY : OPPORTUNITY 2015 ▾

Jane Doe

Stage	Potential Customer *	Est. Revenue	Est. Close Date
3 - Application Received	Jane Doe	--	4/30/2016

Summary

Opportunity Information

Topic *	Jane Doe
Potential Customer *	Jane Doe
Brand *	Anderson Roth
Type *	New Location
Stage	3 - Application Received
Status Reason	In Progress
Territory of Interest 1	--
Territory of Interest 2	--
Territory of Interest 3	--
Description	--

ACTIVITIES

All ▾

-
-
-
-

3. To change the current Sales Stage, select the new one from the drop-down.

Stage

- 2 - Application Sent
- 3 - Application Received
- 4 - Marketing Material
- 5 - FDD Sent
- 6 - FDD Review
- 7 - Validation
- 8 - Discovery Day
- 9 - Package Order

Potential Customer * Est. Revenue | Est. Close Date || John Doe | -- | -- |

Close **Next Stage**

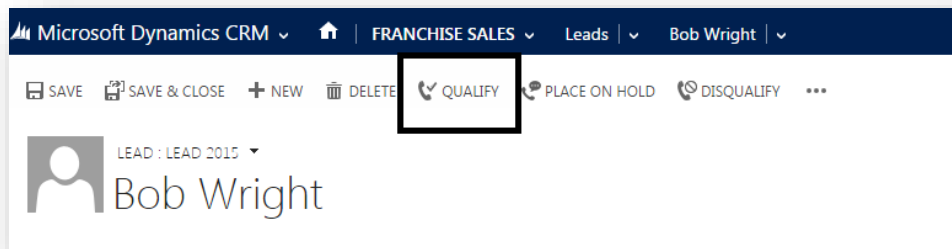
4. Once you have selected the new Sales Stage, click on the Save option in the upper left corner of the page to ensure your change is saved.



Updating Leads/Opportunities as Won, Lost or On Hold

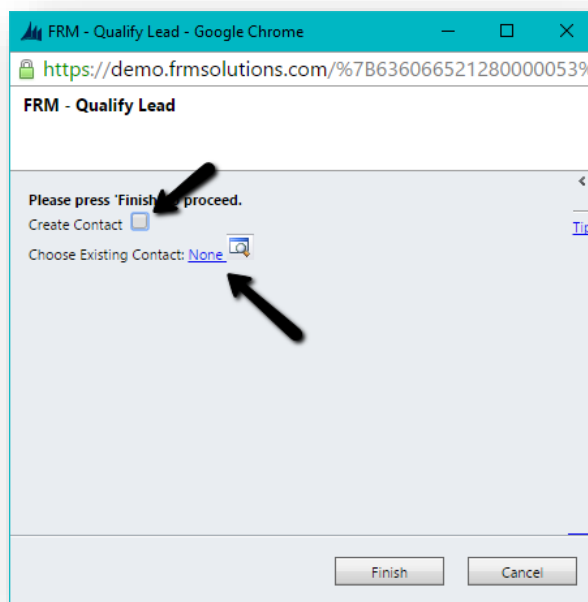
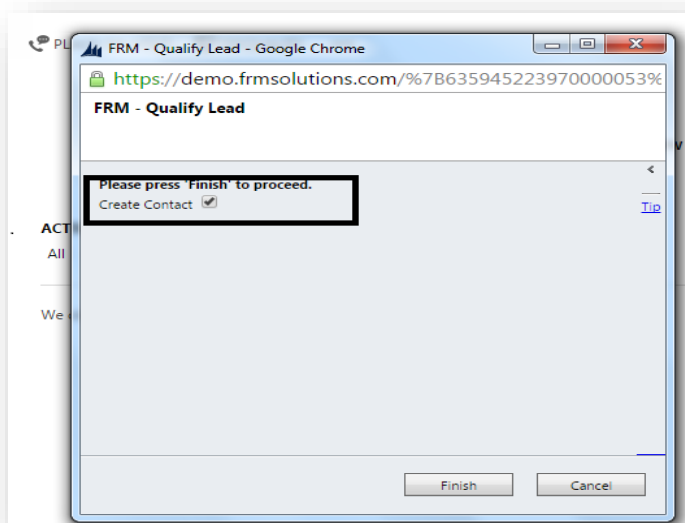
Qualifying a lead

1. With the Lead record open you will notice three distinct buttons in the upper portion of the window (Qualify, Place On Hold, Disqualify). To qualify select the option Qualify from the upper left side of the lead page:



2. Once you click on the Qualify option, a new window opens up. Here you have the option to create a contact, which is already selected by default.

Please Note: If this lead is already a contact within FRM you must uncheck this box and select the contact record that already exists for this individual preventing duplication of contacts within your system.

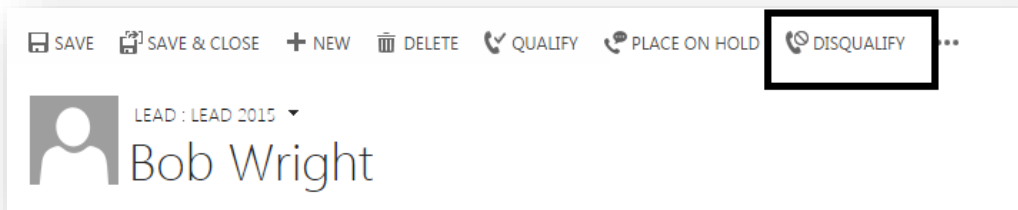




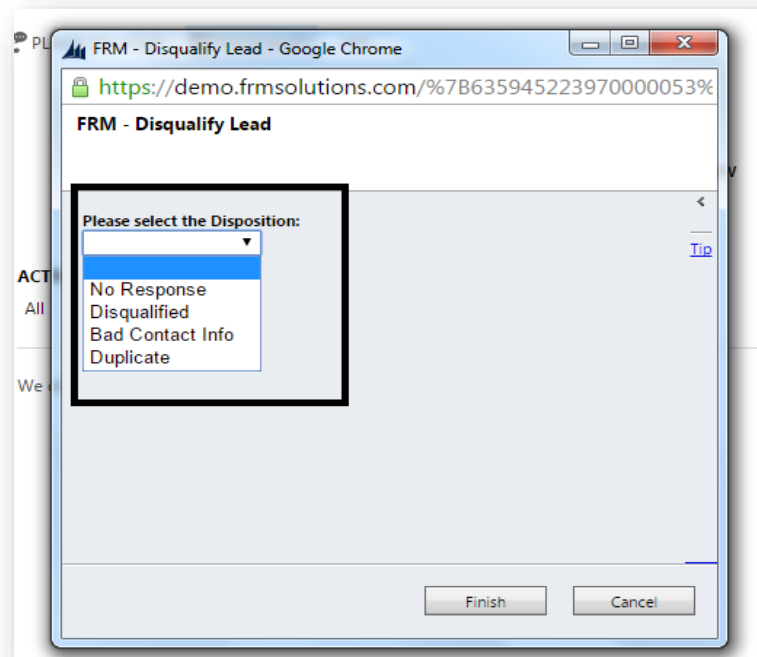
3. Click on **Finish** to qualify the lead.
4. Once the lead is qualified, the system will automatically create a contact record (if selected) and create an Opportunity based on that lead.

Disqualifying a lead

1. If you would like to disqualify a lead, select the Disqualify option from the upper portion of the lead record:



2. Once you selected on the Disqualify option, a dialog window will appear. Here you are required to choose a Disposition Reason for the disqualification, the below options are fully customizable to your needs:



3. Click on **Finish** to complete the disqualification of the lead.

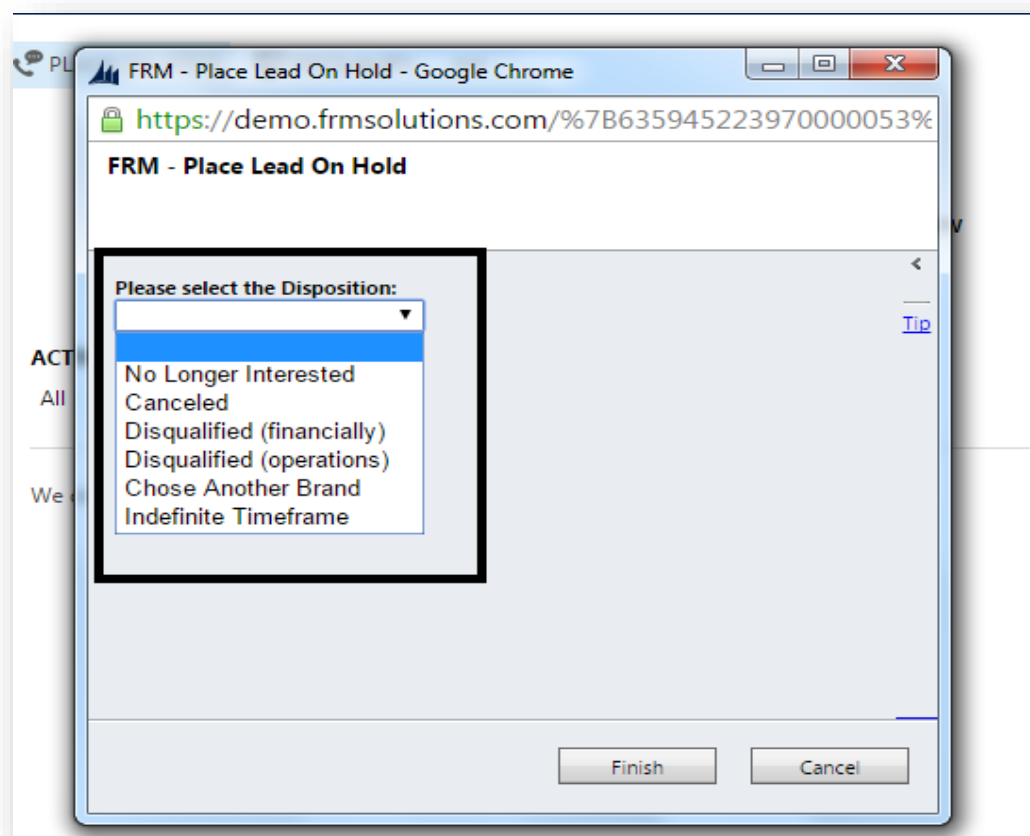


Placing a lead on Hold

1. If you would like to place a lead On Hold, select the On Hold option from the upper portion of the lead record:



1. Once you selected on the Place on Hold option, a dialog window will appear. Here you are required to choose a Disposition Reason for placing the lead On Hold, the below options are fully customizable to your needs:

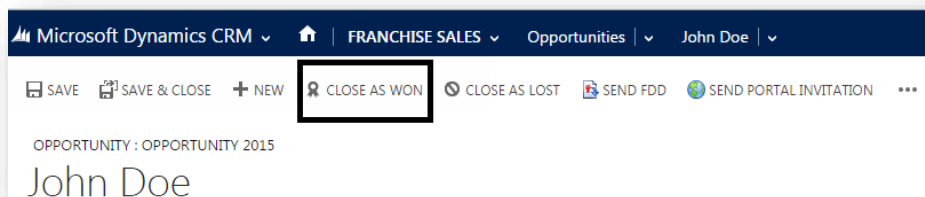


2. Click on **Finish** to place the lead on hold.

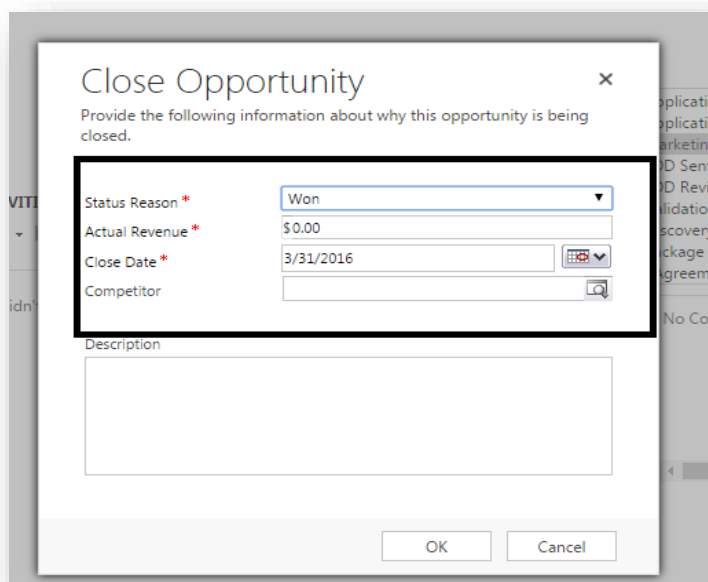


How to close an opportunity as Won

1. With the opportunity record open ensure that the Sales Stage is updated accordingly.
This will be vital to ensure reliable data reporting on your Opportunities
2. From the upper left side of the opportunity page, select the option **Close as Won**:



3. A dialog window will appear; update the necessary fields accordingly.

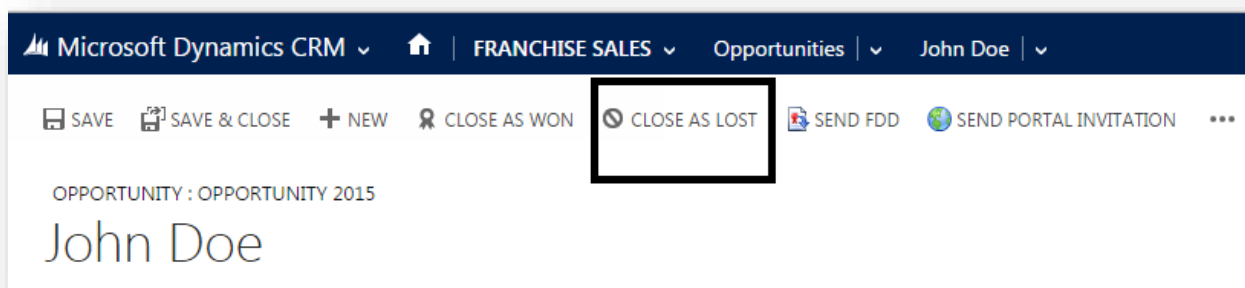


4. Click **OK** to save the changes and place the opportunity in “**Won**” status.

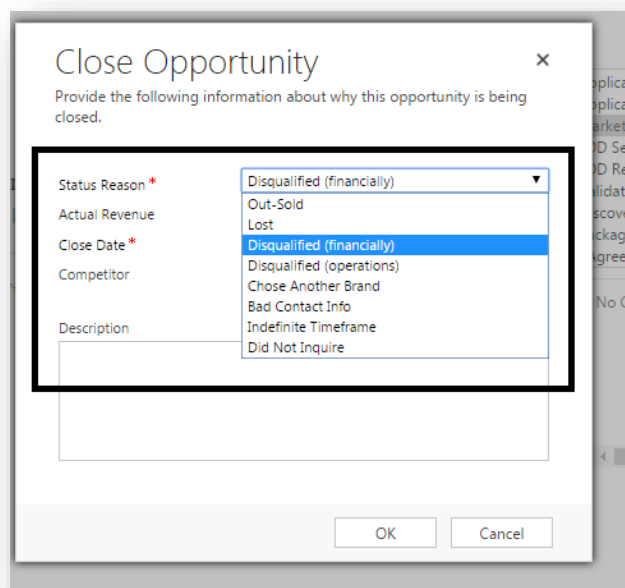


How to close an opportunity as Lost

1. From the upper left side of the opportunity page, select the option **Close as Lost**:



2. A dialog window will appear, update the necessary fields accordingly.



3. Click **OK** to save the changes and place the opportunity on **Lost**.



Sending an FDD

FDD (Franchise Disclosure Document): a legal document which is presented to prospective buyers of franchises in the pre-sale disclosure process. In FRM, this document is sent to both Contacts and Opportunities.

Sending an FDD via the Opportunity

1. Select the Opportunity via the Dashboard or FRM ribbon
2. The FDD is sent to the contact linked to the opportunity in question, you can identify the contact in the left side of the opportunity page:

OPPORTUNITY : OPPORTUNITY 2015

John Doe

Summary

Opportunity Information

Topic *	John Doe
Potential Customer *	John Doe
Brand *	Anderson Roth
Type *	New Location
Stage	4 - Marketing Material
Status Reason	In Progress
Territory of Interest 1	--
Territory of Interest 2	--

3. Click on the Send FDD option located in the upper left side of the page:

Microsoft Dynamics CRM | FRANCHISE SALES | Opportunities | John Doe

SAVE SAVE & CLOSE + NEW CLOSE AS WON CLOSE AS LOST **SEND FDD** SEND PORTAL INVITATION ...

OPPORTUNITY : OPPORTUNITY 2015

John Doe

Summary



4. A dialog window will appear, here you will be able to see the name of the contact to whom the FDD will be sent and below that the version of template that will be sent. If you have multiple FDD's you will need to update this field accordingly.

FRM - Send FDD Dialog - Google Chrome

https://demo.frmsolutions.com/%7B635945223970000053%7D/WebResources/frm_/Sen

Send FDD Dialog

Note: FDD Emails will be queued up and may take a few minutes to be created and/or delivered.

Select the person(s) to receive the FDD *

John Doe ;

Select the FDD to send *

NY

Finish Cancel

5. To change the FDD template you would like to send select the magnifying glass and choose the correct FDD from the dialog window that will appear:

Select the FDD to send *

NY

6. Click **Finish** to finalize the operation and send the FDD to the contact.



Sending an FDD to Multiple parties

1. There may be cases in which you will want to send the FDD to an additional contact (e.g. business partners), besides the primary contact on the Opportunity.
2. If there are other parties requiring disclosure, select the look-up icon indicated below. This will open a dialog showing all Contacts within the system. Select all that need to be disclosed and click Add.
3. Click **Finish** to finalize the process and send the FDD to both contacts on the opportunity.

The screenshot shows two overlapping windows from the FRM Solutions web application. The background window is titled "Send FDD Dialog" and has a URL bar showing "https://demo.frmsolutions.com/%7B636066521280000053%7D/WebResources/frm_/Sen". It contains a note: "Note: FDD Emails will be queued up and may take a few minutes to be created and/or delivered." Below the note, there are two sections: "Select the person(s) to receive the FDD *" with a text input containing "Doug Gilmour;" and a magnifying glass icon; and "Select the FDD to send *" with a text input containing "NY" and a magnifying glass icon. A black arrow points from the magnifying glass icon in the second section to the "Look Up Records" dialog box in the foreground. The foreground dialog box is titled "Look Up Records" and has a close button (X) in the top right corner. It contains the text "Enter your search criteria." and three dropdown menus: "Look for" (set to "Contact"), "Look in" (set to "Contacts Lookup View"), and "Search" (with a placeholder "Search for records" and a magnifying glass icon). There is also a checkbox labeled "Show Only My Records". Below these are two columns of search results: "Full Name" and "Email". The first result is "Abbott Preston" and "apreston@arke.com". Below the results is a pagination bar showing "1 - 163 of 163 (0 selected)" and "Page 1". At the bottom of the dialog are buttons for "Select", "Remove", "New", "Add", and "Cancel".



Publishing a New/Updated FDD

1. In order to publish a new FDD you will need to access the FRM support portal (<http://support.frmsolutions.com/>) and submit a case.
2. FRM Handles the creation and update of FDD's as a Basic (non-billable) support request.

FDD Process – Candidate/Contact

1. Once an FDD is sent to the candidate, they will receive an email requesting review & digital signature
2. After clicking the Review and Sign hyperlink in the email they will be redirected to a SharePoint site for electronic signature.
3. There are 3 steps to follow to complete the process:
 - 3.1. **Download FDD** – it is critical that there is proof that the candidate received the document;
 - 3.2. **Verify FDD download** (this is to make sure that the document is indeed downloaded before getting signed) – here you will have to upload the downloaded document back into the site;
 - 3.3. **Sign FDD receipt** – here you need to electronically sign the FDD; you also have the option to insert the date of the signing.

Franchise Disclosure Document

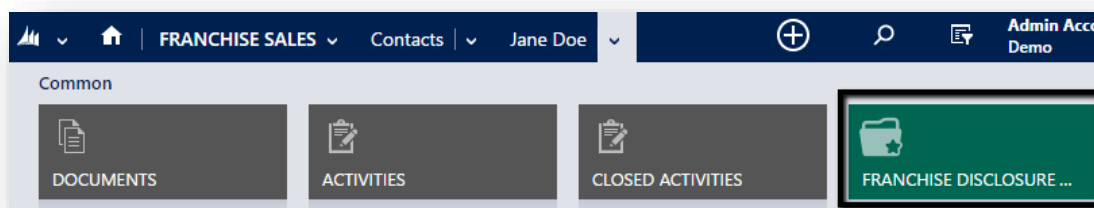
Search this site

Step	Activity
1	Download FDD Before you can sign the FDD receipt, you must download and review the Franchise Disclosure Document. Download FDD
2	Verify FDD Download To verify that the FDD document was downloaded, please browse to select the FDD document on your computer. Then press the "Verify" button. <input type="text"/> Browse... <input type="button" value="Verify"/>
3	Sign FDD Receipt Once you have downloaded and read the Franchise Disclosure Document, please sign the receipt acknowledging that you have read the entire document.

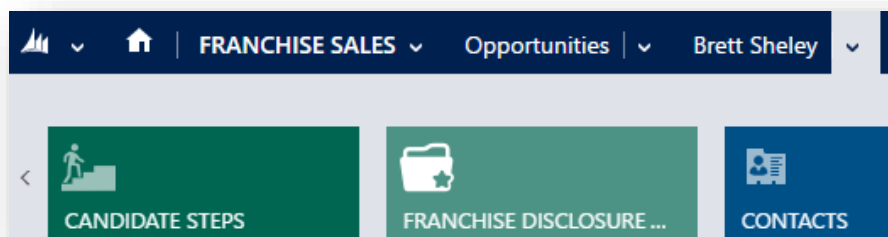


Reviewing Status' of Sent FDD's / Download Signed FDD

1. One can access FDD information from the contact the FDD was sent to or from the opportunity
2. With the contact open, select the drop-down next to the contact name to expose the ribbon. Select the Franchise Disclosure Agreements tile.



3. You can also verify the status of an FDD directly from an opportunity record; in the opportunity bar, select the drop-down next to the opportunity name and select Franchise Disclosure Documents.

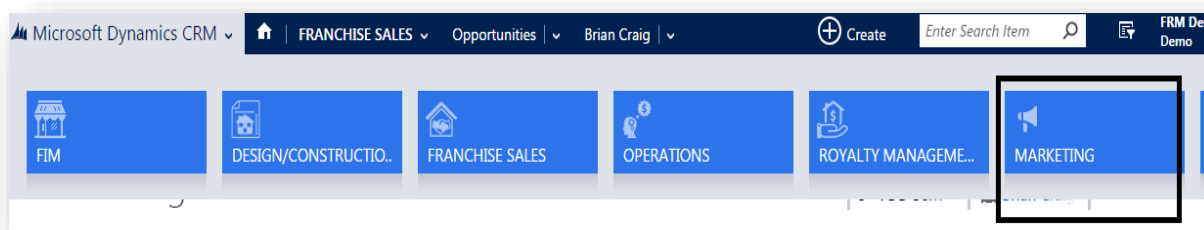


4. Under Franchise Disclosure Documents you can verify the status of the FDD's sent for the opportunity in question.
5. If you click and select the FDD, you will be able to access an audit trail of the activities on the FDD and a PDF file of the signed FDD.

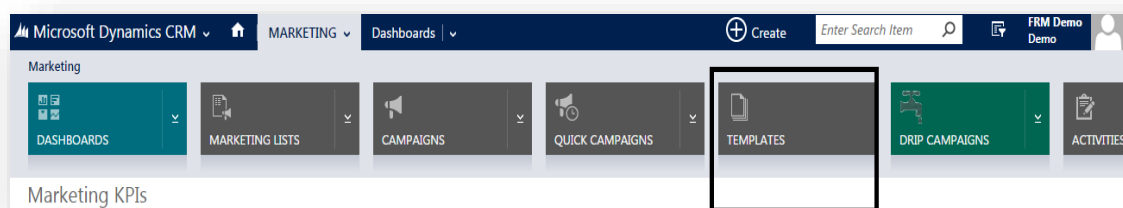


Update Lead Auto-Reply Email

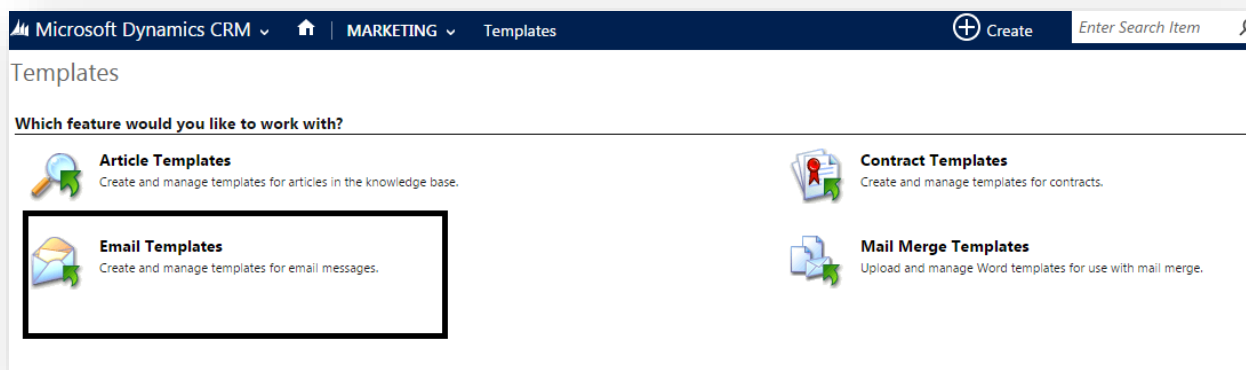
1. Using the ribbon navigate to the **Marketing** tile as indicated below:



1. Select **Templates**:



2. For the **Templates** option, select **Email Templates**:



3. Here you can either choose to modify and customize the **FRM – Lead Auto Reply** existing template (located in the Email templates drop-down) or you can create a new template.



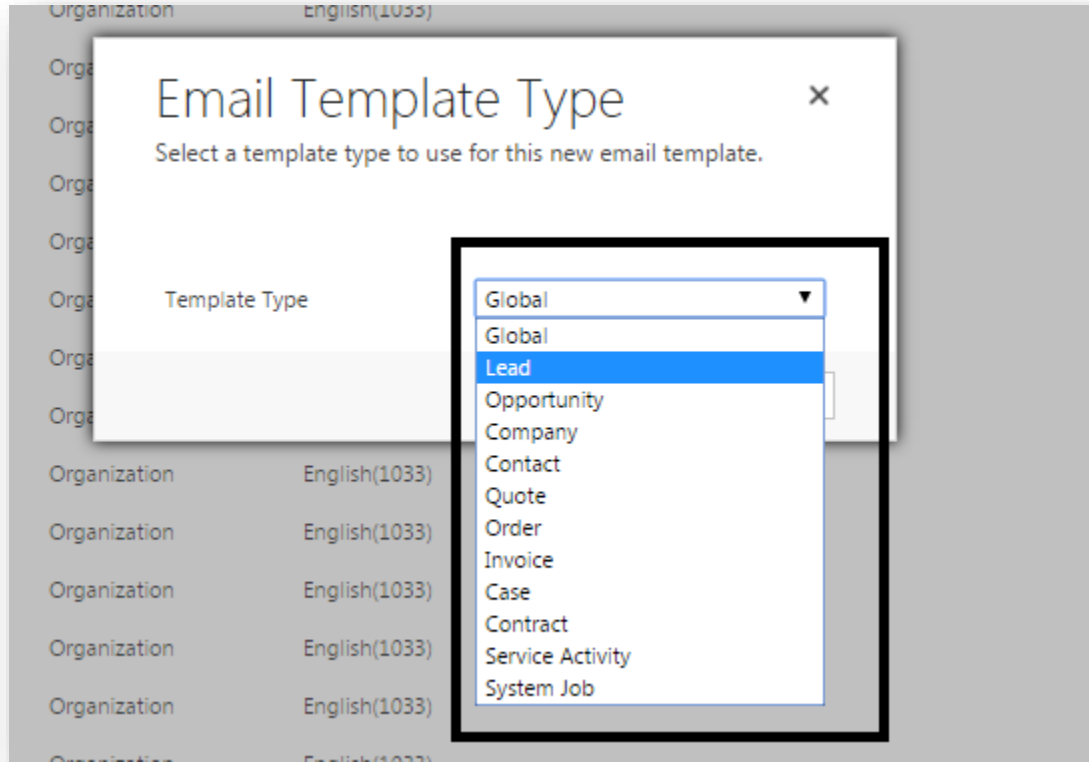
4. To create a new template, click on **New** icon under Email Templates:

Title	Template Type	Viewable By	Language
Account Reconnect	Company	Organization	English(1033)
Account Reconnect : (Version 7.0.0.0)	Company	Organization	English(1033)
AR - Application Invite	Opportunity	Organization	English(1033)
AR - Lead Auto Reply	Lead	Organization	English(1033)
AR - My Messages Regarding Anderson Roth	Lead	Organization	English(1033)
AR - New Lead Internal Notification	Lead	Organization	English(1033)
Brian Test	Global	Organization	English(1033)
Bulk Deletion Task Completed With Failure Template	System Job	Organization	English(1033)
Bulk Deletion Task Completion Template	System Job	Organization	English(1033)
Bulk Deletion Task Failed Template	System Job	Organization	English(1033)
Case Auto Response	Case	Organization	English(1033)
Case Escalation	Case	Organization	English(1033)
Closed Case Acknowledgement	Case	Organization	English(1033)
Contact Reconnect	Contact	Organization	English(1033)
Contract Expiration Notification	Contract	Organization	English(1033)



5. In the pop-up window, you need to select the **Template Type** from the drop-down.

Note: Within FRM you will have the option to conveniently auto-populate data from a record onto the email template when it is sent. For example, if you wanted to create an email template that would be sent to a large group of contacts and want to auto-populate their first names be sure to select the “Contact” template type from the drop-down.





6. After entering all the necessary information (Title, Description, Subject and email body) select the option **Save and Close** to save your template. If you desire to work with the HTML directly, please hit the SOURCE button on the toolbar toggling your view from rich-text to HTML.

Email Template: New Email Template Working on solution

Details

Type * Lead Template Language English

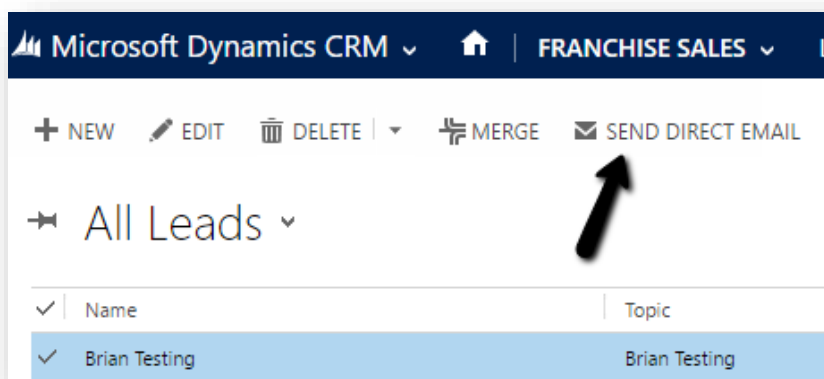
Title *

Description

Subject *

Rich text editor toolbar: Cut, Copy, Paste, Undo, Redo, ABC, Link, Unlink, Flag, Image, Table, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Quote, Unquote, Styles, Normal, Source.

7. Save and Close your new email template. This template will be ready to use within the entity you selected when you chose your template type in step 5. You can access your template by selecting a record you wish to send an email to and hitting **Send Direct Email**.





8. Select the template you created and hit Send

Send Direct Email

Select an email template to use and which records to send to from the following options.

Language

English

Lead Templates

AR - Lead Auto Reply

AR - My Messages Regarding Anderson Roth

AR - New Lead Internal Notification

FRM - Lead Auto Reply

Type:

Created By:

Created On:

Description:

Lead Templates

Admin Account

2/18/2014

Send direct email to:

☒ Selected records on current page

Send direct email only to the records you selected on this page.

☐ All records on current page

Send direct email to all the records on this page.

☐ All records on all pages

Send direct email to all the records on all the pages in the current view.

Send direct email from:

User or Queue *

Admin Account

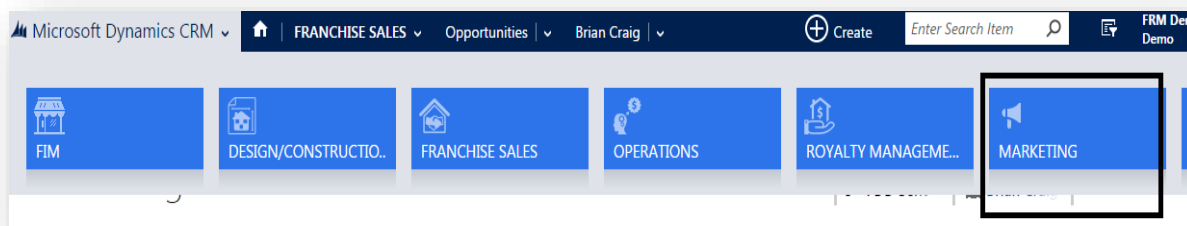
Send

Cancel

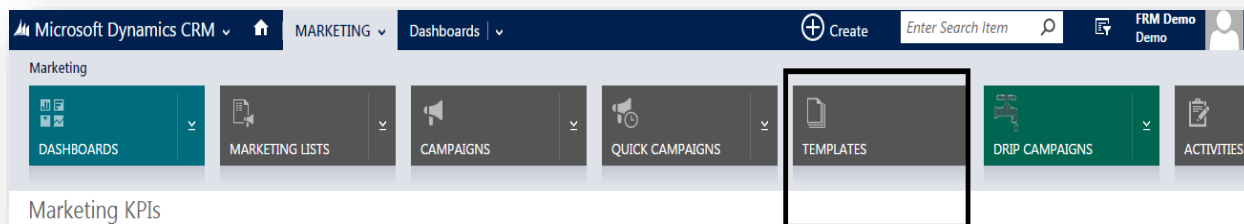


Configure/Update Candidate Portal Invitation Email

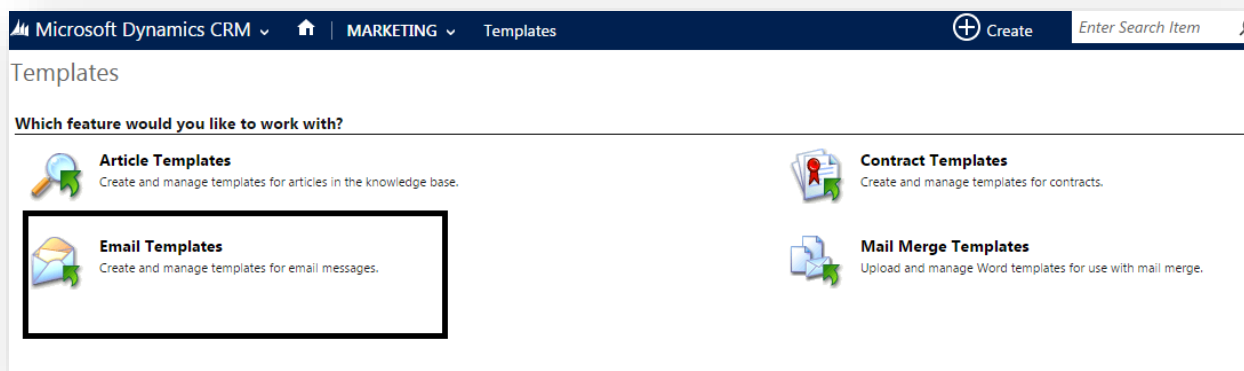
1. From the FRM ribbon select the **Marketing** tile:



2. Select **Templates**:

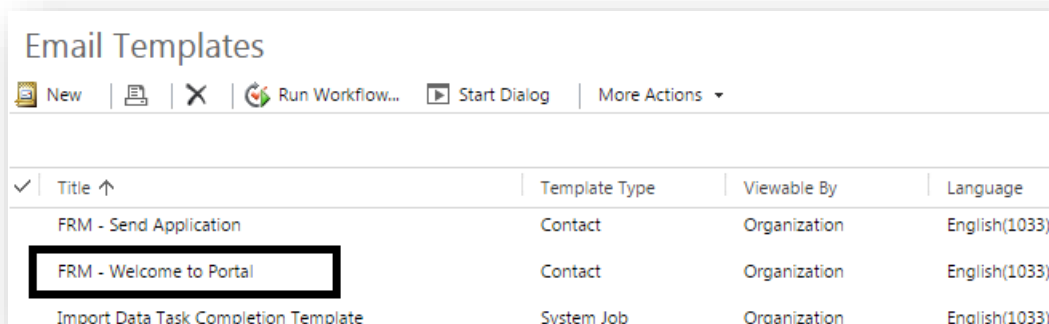


3. Select **Email Templates**:





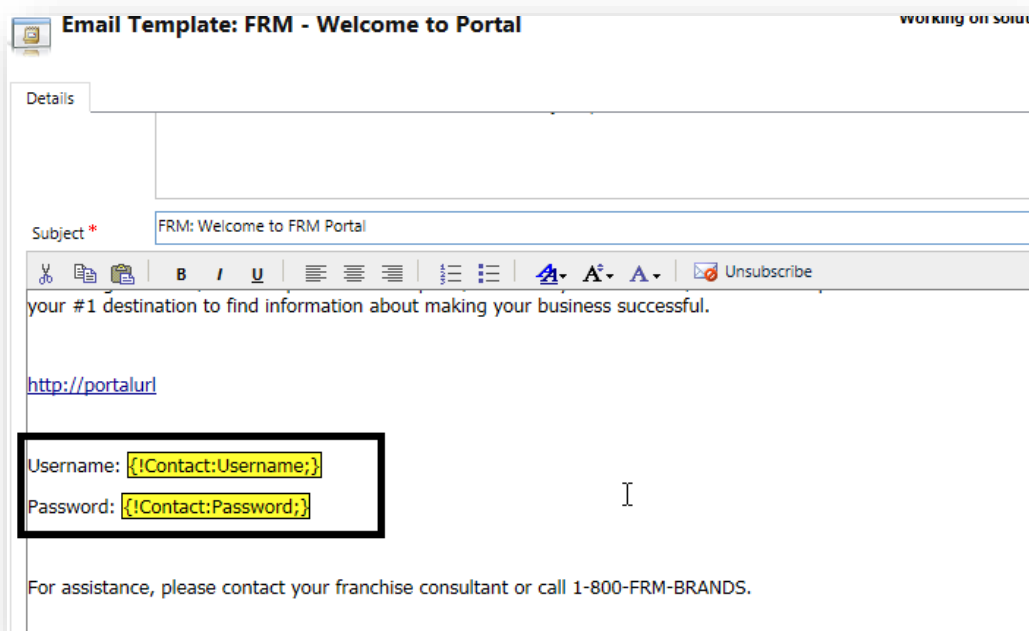
- From the available options of templates, you need to choose the template **FRM – Welcome to Portal**:



The screenshot shows a web interface titled "Email Templates". At the top, there is a toolbar with icons for "New", "Run Workflow...", "Start Dialog", and "More Actions". Below the toolbar is a table with the following columns: "Title", "Template Type", "Viewable By", and "Language". The table contains three rows of data. The second row, "FRM - Welcome to Portal", is highlighted with a black border.

Title	Template Type	Viewable By	Language
FRM - Send Application	Contact	Organization	English(1033)
FRM - Welcome to Portal	Contact	Organization	English(1033)
Import Data Task Completion Template	System Job	Organization	English(1033)

- In the email template, you have the option to customize the information to adapt to your business needs (Title, Description, Subject and email body).
- In the email body you will see that **the username and password** are highlighted in yellow; you don't have to make any changes to these fields, as they will be automatically populated with your details.



The screenshot shows the "Email Template: FRM - Welcome to Portal" editor. The "Details" tab is active. The "Subject" field is labeled "Subject *" and contains the text "FRM: Welcome to FRM Portal". Below the subject field is a rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and an "Unsubscribe" button. The email body text is as follows:

your #1 destination to find information about making your business successful.

<http://portalurl>

Username: **{!Contact:Username;}**

Password: **{!Contact:Password;}**

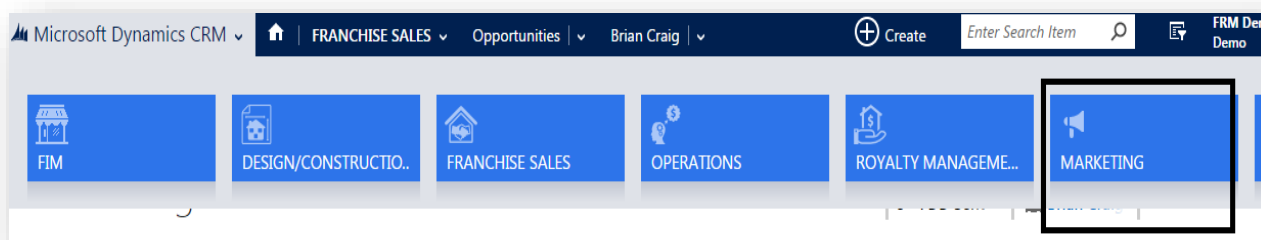
For assistance, please contact your franchise consultant or call 1-800-FRM-BRANDS.

- After inserting all the necessary information select the option **Save and Close** to save your template.

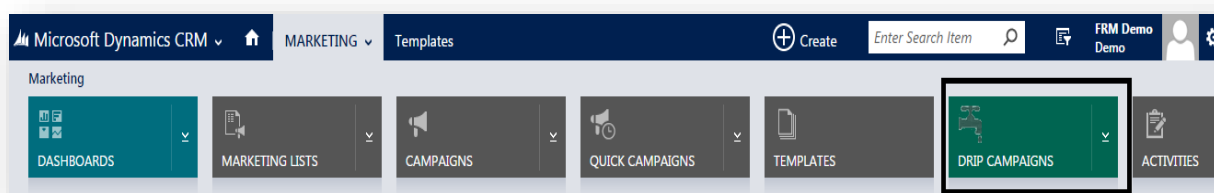


Configure Drip Campaign

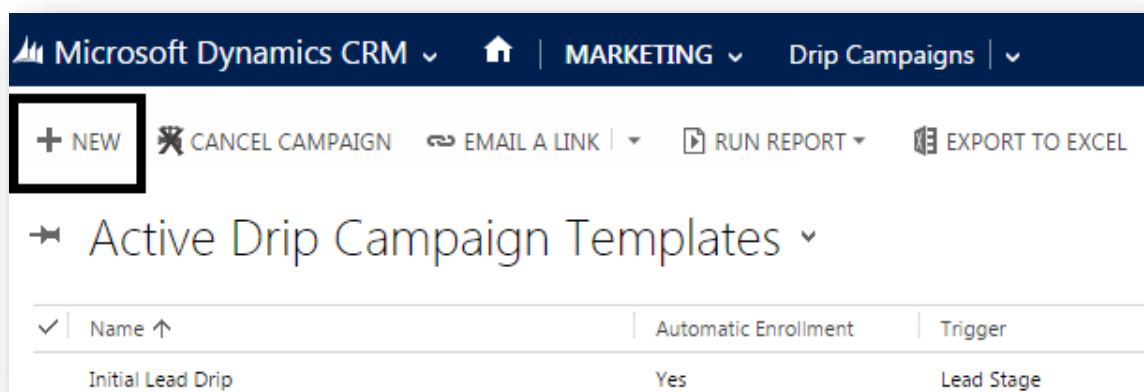
1. From the FRM ribbon select the **Marketing** tile:



2. From the Marketing drop-down, select the icon **Drip Campaigns**:



3. In order to create a campaign, you need to go to the upper left side of the page and click on **New** icon:





4. Enter a name for your new drip campaign

DRIP CAMPAIGN : INFORMATION

New Drip Campaign

General

Name *	<input type="text"/>
Is Template	No
Automatic Enrollment	No
Brand (Optional)	--

- If the drip campaign will be reused, please select the “yes” within the **Is Template** field
- If you would like this drip-campaign to be sent and stopped via certain triggers (i.e. when a new lead arrives in the system) select “yes” within the **Automatic Enrollment** field.
- If you possess multiple brands you may create brand-specific drip-campaigns that will only apply to leads tagged with that brand. If this does not apply to your business, leave this field blank.

5. Next you will be required to select the triggers for this drip-campaign; In this example we will use **Lead Stage** as our trigger.

Select the Trigger for this Campaign

Trigger	<div>Lead Stage</div>
---------	-----------------------



6. After selecting your trigger, you will see **Stop** and **Start** clauses appear. This will include all of your lead stages and you must assign them. In this example, we will select the **1 – New** status to start the drip-campaign and once the rep has successfully made contact with the lead changing the status to **Contacted** will stop the campaign.

Triggers

Lead Stage Trigger

Start: 1 - New ▼

Stop: 2 - Contacted ▼

7. **Save** your changes
8. The next step is to add the messages you want for this drip campaign; in order to do so, go to the right side of the page and click on the + icon right below the status of the campaign:

Status Reason: Active

Days From Start ↑	Status Reason	Email Template Name	Desired Lead Disposition
No Drip Campaign Step records found.			

+ icon

9. In the pop-up window, you will need to customize the details for your drip campaign accordingly;



10. The **Days from Start** section is to be populated with the number of days from the time the drip-campaign began until the message should be sent

DRIP CAMPAIGN STEP : INFORMATION

New Drip Campaign Step

Sent Date --	Activity Status* Open
-----------------	--------------------------

General

Days From Start

Action - Choose one or both of the following:

Email Template

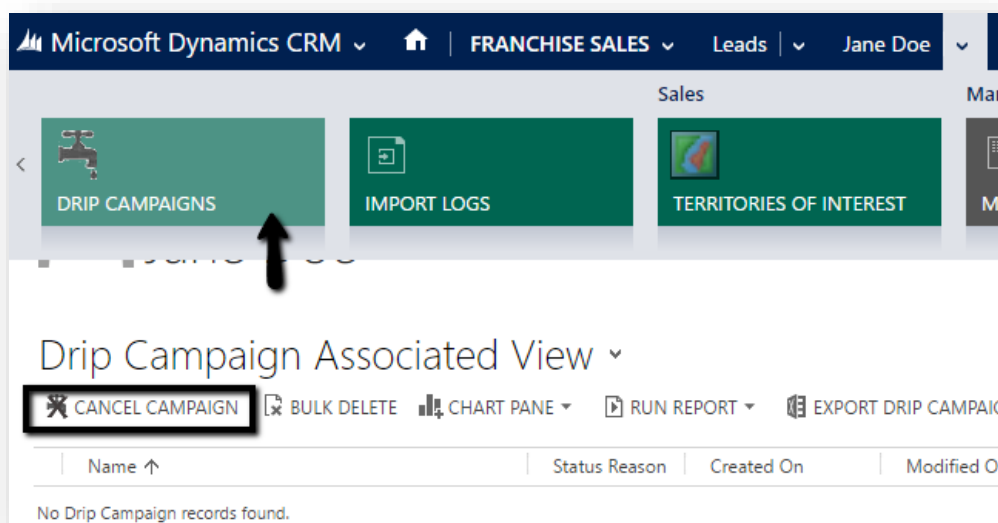
Desired Lead Disposition --

11. Next you will have to select the Email Template from the drop-down
12. There is an option to add a **Desired Lead Disposition**, if you wish to update the lead disposition after a specific email is sent.
13. Click the **Save & Close** option to save your changes;
14. You will be able to identify your drip campaign messages on the right side of the page, for monitoring purposes: **Days from Start, Status Reason and Email Template Name**.

Days From Start ↑	Status Reason	Email Template Name
0	Canceled	FRM - Lead Auto Reply
2	Open	AR - My Messages Regarding Anderson Roth



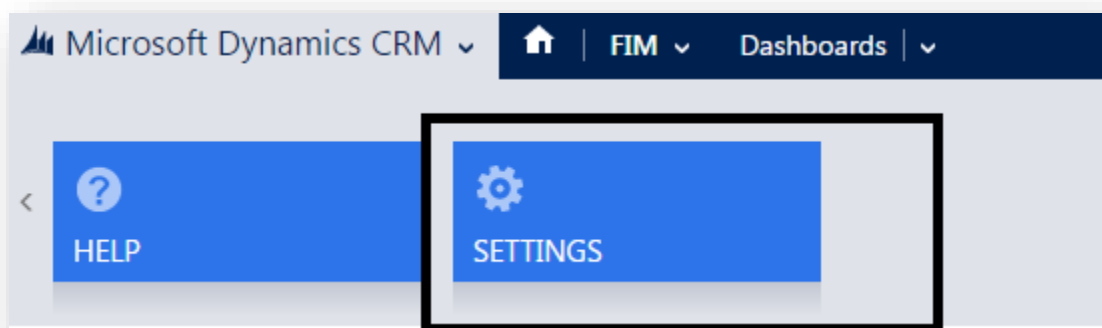
15. If you are ever curious where a lead is in their drip-campaign you can view this via their **Activities Feed** or by selecting the drop-down next to their name in the ribbon and selecting the **Drip Campaign** field. It is from here one can cancel an in progress drip-campaign if they wished.



Configure Lead Reassignment

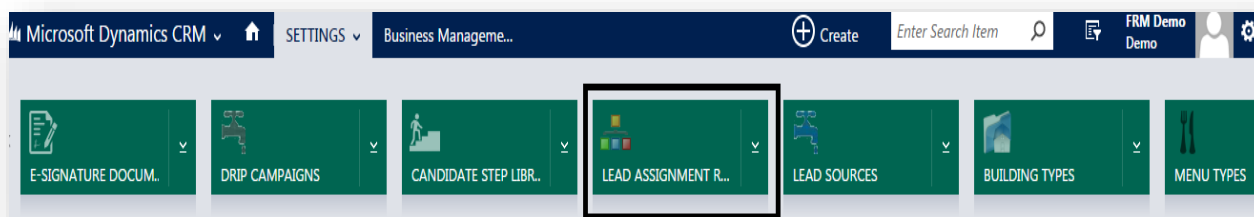
Lead Reassignment is the process of assigning new leads entering the system to your sales representatives. Please follow the below steps in order to update or create **lead reassignment** rules.

1. Within the FRM ribbon, select **Microsoft Dynamics CRM** and from the drop-down select the **Settings** icon:





2. From the Settings drop-down, select **Lead Assignment Rules** icon:



3. There are 3 options for lead reassignment:
 - 3.1. Assign to **Sales Territory** or **State**- select the Territory or State from the drop-down and assign the sales rep. When a new lead arrives tagged with that city or state they will be automatically assigned to the sales rep. you provided.
 - 3.2. **Round Robin** option - based on a list of provided users that participate in the Round Robin, each of the individuals involved will take turns in receiving leads. To manage the list for the Round Robin routing, click on **Round Robin Lead Assignment** and in the pop-up window you can change the order of the sales reps involved; **Save & Close** the changes made.

LEAD ASSIGNMENT RULE : INFORMATION

New Lead Assignment Rule

Assignment

Choose State/Province and/or Country or Neither

State/Province -- Country --

Choose Sales Territory or User or Round Robin

Sales Territory -- Assign to User -- Round Robin ☒

Round Robin Lead Assignment

User	Enabled	Order ↑	Next Lead Recipient
Arke Test	Yes	1	Yes
Demo Account	Yes	2	No
Demo Franchisor	Yes	3	No

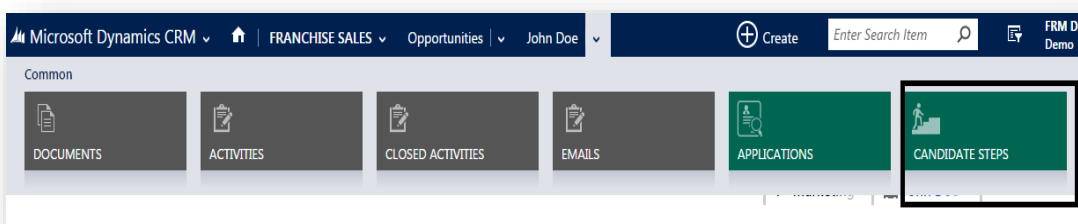


Lock & Unlock Candidate Portal Content

1. Select & open the opportunity

✓	Created On ↑	Topic	Type	Primary Contact	Est. Close Date	Stage	Status Reason
✓	3/4/2016 3:14 PM	Disqualification City	New	Disqualification City		3 - Qualifying	In Progress
	3/4/2016 2:49 PM	Stay Active	New	Stay Active		3 - Qualifying	In Progress
	3/4/2016 2:22 PM	Disqualify Me	New	Disqualify Me		3 - Qualifying	In Progress
	1/22/2016 10:17 ...	Sai Conda	New	Sai Conda		7 - FDD Sent	In Progress

2. With the opportunity select Candidate Steps from the ribbon underneath the open Opportunity



3. Select the step or steps you would like to update and hit the lock or unlock buttons indicated below:

Candidate Step Associated View ▾

+

ADD NEW CANDIDATE STE.

✎

EDIT

✓

ACTIVATE

⏏

DEACTIVATE

🗑

DELETE CANDIDATE STEP

🔒

LOCK

🔓

UNLOCK

⋮

✓	Name ↑	Status Reason	Sequence Number (Candidate Step Content)
✓	Application	Locked	1
✓	Application Review	Locked	2
	Discovery Day	Locked	5
	FDD Delivery	Locked	3
	New Step	Locked	6
	Validation	Locked	4

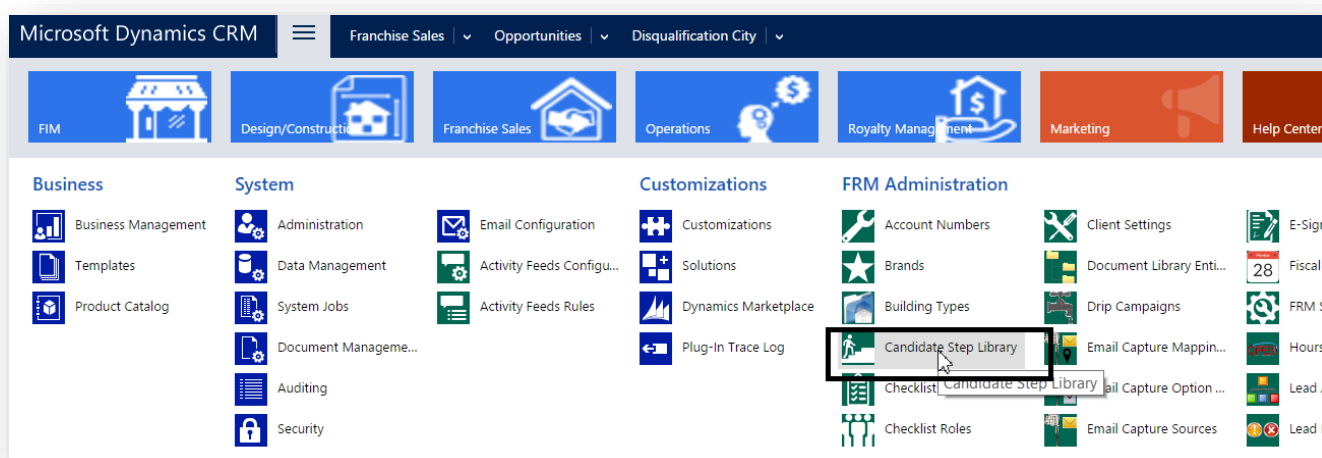
Regardless of what Sales Stage the opportunity is in, you can manually unlock multiple or all sequence numbers.



Automatically Unlock Candidate Portal Content by Sales Stage

Unlocking a certain Candidate Portal step can also be done automatically, by synchronizing the corresponding step with your Sales Stages.

1. From the Settings menu, select the icon **Candidate Step Library**. Here you will see all steps with their corresponding **Sequence Numbers**:



➤ Active Candidate Step Library ▼

✓ Name ↑	Sequence Numb...
✓ Application	1
FDD	2
Validation	3
Brand Specific - Dev Brands	4
Brand Specific - FRM Test Brand Only	4



- Each of these above steps has a value that will help you synchronize the Sales Stage with the opportunity. That value is a number that is auto-assigned within the Sales Stage field. You must know what the values are of this option set before you set up or change your sales stages. If that stage is met, the candidate step and all steps before that will be unlocked automatically.

CANDIDATE STEP CONTENT : INFORMATION

Application

General

Name *	Application
Content	Application Content
Hyperlink	http://www.google.com
Sequence Number	1
Unlock at Sales Stage	1
Brand	--

- You can verify the opportunity Sales Stage information at what value the candidate step will be unlocked and compare the values.

Application

General

Name *	Application
Content	Application Content
Hyperlink	http://www.google.com
Sequence Number	1
Unlock at Sales Stage	1
Brand	--

Field

Stage of Opportunity

Common

- Information
- Business Rules

General

Enabling field security? [What you need to know](#)

Auditing * ☒ Enable ☐ Disable

Description

Select the sales process stage for the opportunity to indicate the probability of closing the opportunity.

Appears in global filter in interactive experience ☐ Sortable in interactive experience dashboard ☐

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics CRM SDK](#)

Type

Data Type * Option Set

Field Type * Simple

Use Existing Option Set ☐ Yes ☒ No

Default Value 3 - Qualifying

Options

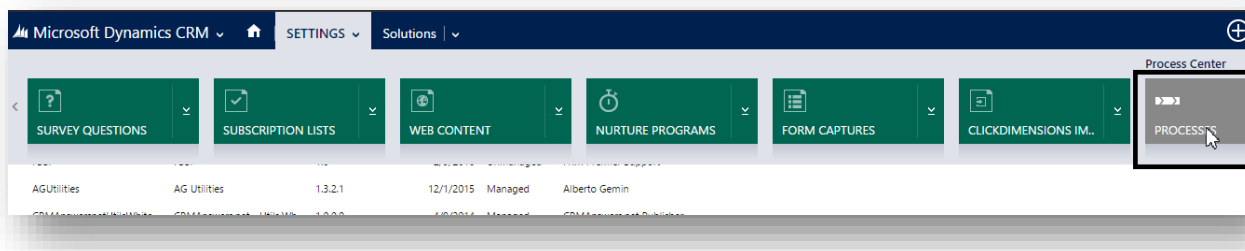
3 - Qualifying	Label *	3 - Qualifying
4 - Application	Value *	1



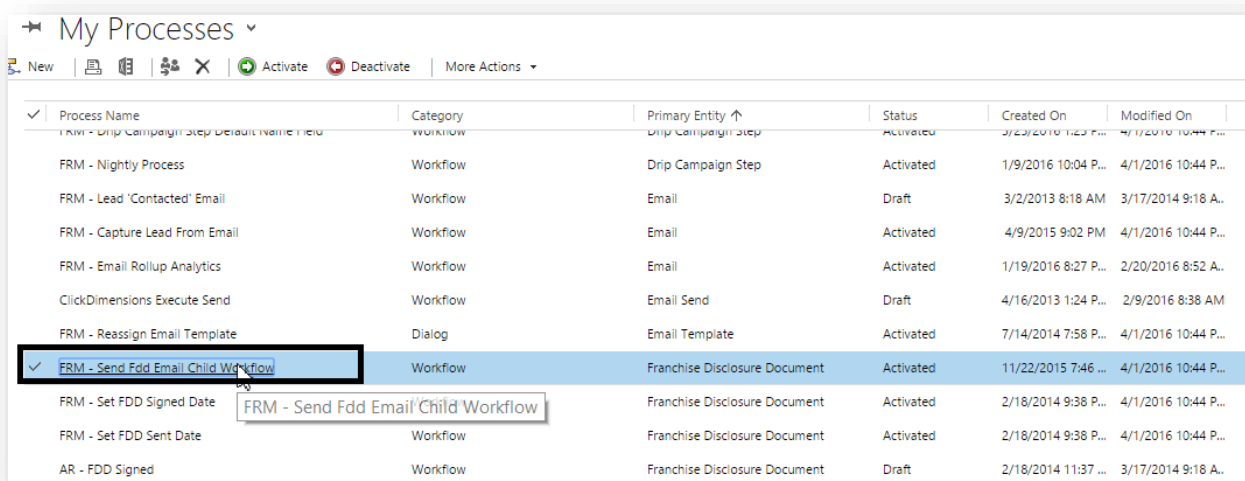
Edit FDD Email Template

In order to modify the message that is released to a prospect when you send them an FDD you must modify the workflow responsible for sending the FDD.

1. From the Settings menu, select the icon Processes

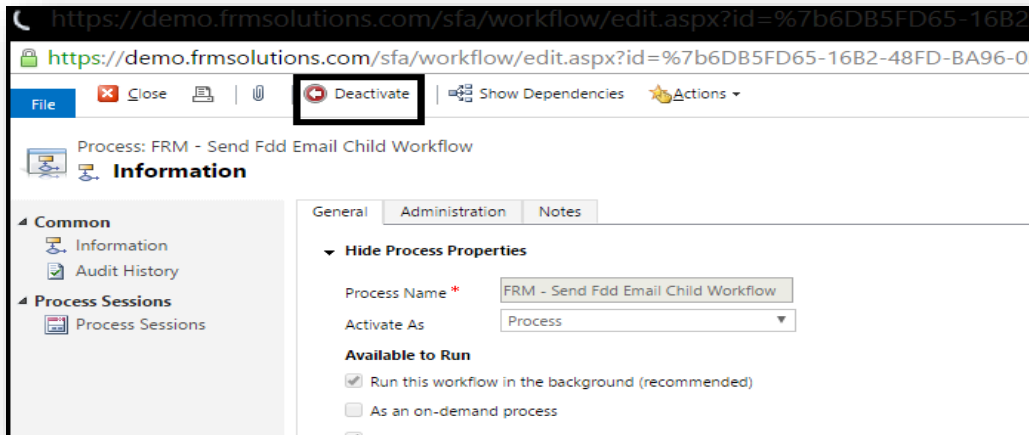


2. Select the **FRM – Send FDD Email Child Workflow**

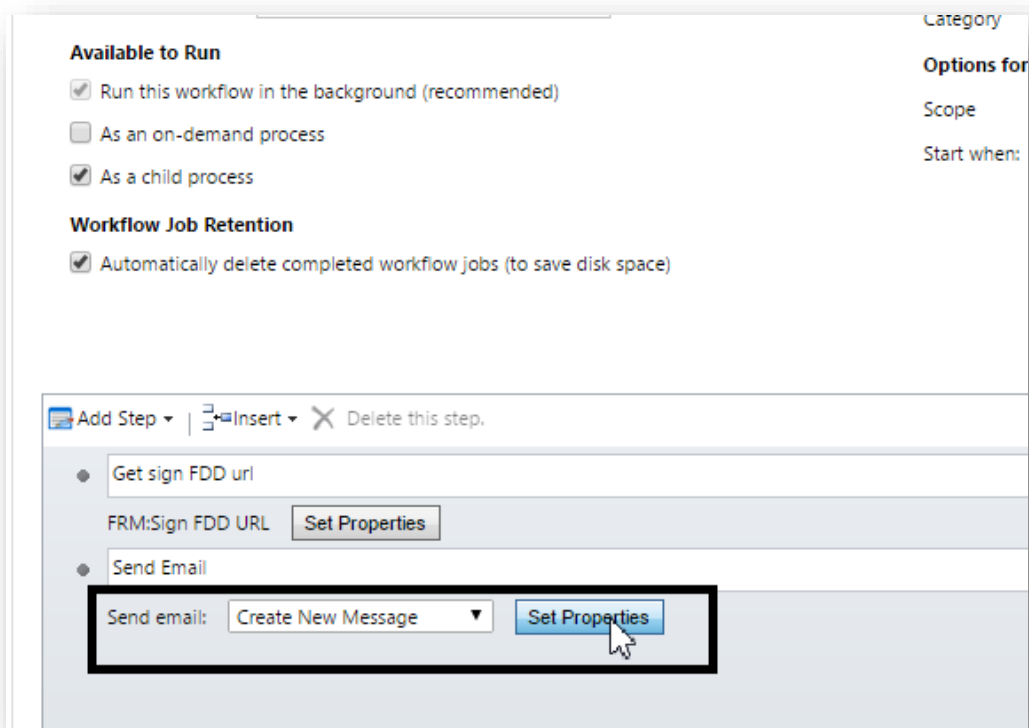




- Before you can make changes to any workflow, you must **deactivate** it. Please note that this change will affect all users of the system so when deactivating a critical to business workflow it is best to inform all users of the system or to execute in off-hours.



- With the workflow deactivate select the **Set Properties** button from the field **Send email** step





5. A window will appear containing the content for the FDD email that is released to the prospect.
6. For more information on updating email templates please see the Global CRM Topics user guide [here](#).
7. When you complete editing the email body and details as per your needs, click the **Save and close** option in the upper left side of the page to save your changes.

The screenshot shows a 'Send Email' form within a process window titled 'Process: FRM - Send Fdd Email Child Workflow'. The form has a 'File' menu in the top left with a 'Save and Close' button highlighted by a black rectangle. Below the menu, the form fields are as follows:

From	{Owner(Contact (Contact))}
To	{Contact(Contact (Contact))}
Cc	

8. Next, you must save the workflow and reactivate it by hitting the option **Activate**; this will reinstate the process of FDDs being sent.

The screenshot shows the 'Information' tab of the 'Process: FRM - Send Fdd Email Child Workflow' window. The 'Activate' button in the top toolbar is highlighted by a black rectangle. The 'Information' tab is active, showing the following details:

General		Administration	Notes
▼ Hide Process Properties			
Process Name *	FRM - Send Fdd Email Child Workflow	Entity	Fr
Activate As	Process	Category	W
Available to Run			



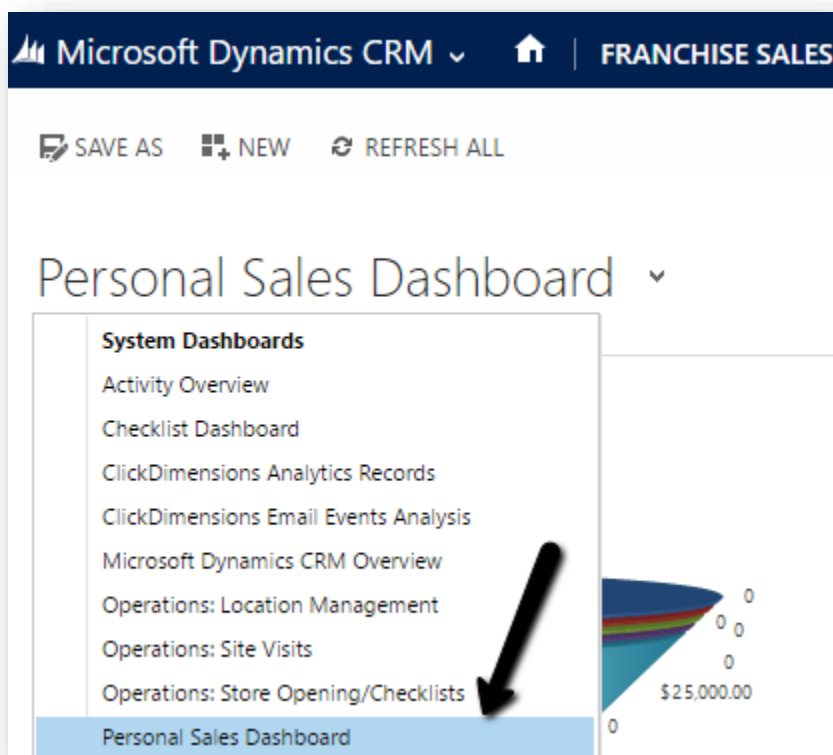
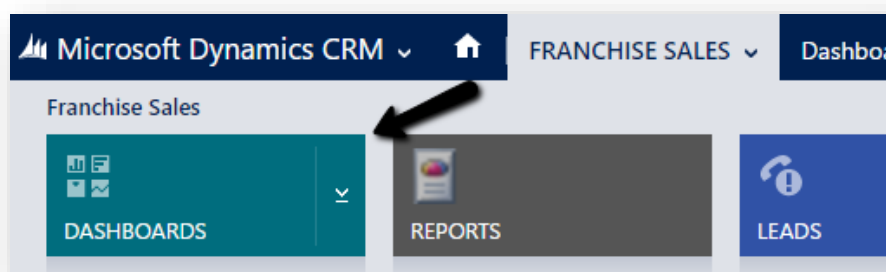
Candidate Portal Analytics

As a prospect is moving through your sales pipeline and navigating the candidate portal their page views and logins will be tracked and stored within FRM providing the franchisor better visibility into what actions they are taking and how they are responding to the process.

There are multiple ways one can access this information. They may do so from the Personal Sales Dashboard, from the Opportunity or from the Activities entity within FRM. We will outline each of those below.

Accessing Candidate Portal analytics data via the Personal Sales Dashboard

1. From within FRM select Dashboards > Personal Sales Dashboard





2. With this Dashboard open on your screen you will notice at the bottom there is a section dedicated to portal activities. This section is defaulted to a view of “Recent Portal Activities” but you may change that by selecting the drop-down.

The screenshot shows a dashboard titled "Recent Portal Activities" with a dropdown arrow. The dropdown menu is open, displaying a list of system views. The "Recent Portal Activities" view is highlighted in blue. Below the dropdown, a table of portal activities is visible, showing columns for "Created" and "Subject".

System Views	
All Portal Activities	
All Portal Activities Regarding Leads	
Candidate Portal Logins (Last 12 Months)	
Closed Portal Activities	
Franchisee Portal Logins (Last 12 Months)	
Portal Activity Associated View	
Recent Portal Activities	
Create Personal View	
Save Filters as New View	
Save Filters to Current View	

	Created	Subject
	5/2016 12:47 PM	Logged In
	5/2016 12:12 PM	Logged In
	4/2016 11:04 AM	Logged In
	4/2016 10:02 AM	Logged In
	7/2016 12:54 PM	Logged In
	7/2016 10:58 AM	Logged In
	5/2016 11:52 AM	Logged In
Eric Stoll	Login	8/30/2016 8:54 AM Logged In

1 - 8 of 437



Accessing Candidate Portal analytics data via the Opportunity

1. Open the prospect's opportunity that you would like to review.
2. Candidate portal activities will be present within that Opportunity's activity pane

Summary

Opportunity Information

Topic* Doug Gilmour

Potential Customer* Doug Gilmour

Brand* NewCo Ice Cream

Type* New Location

Stage 2 - Application Sent

Status Reason In Progress

Territory of Interest 1 --

Territory of Interest 2 --

Territory of Interest 3 --

Description --

ACTIVITIES NOTES

All | Add Phone Call Add Task ...

Admin Account
Admin Account has sent you an FDD to sign!!
4/27/2016 11:22 AM

Admin Account
Message received from Ty Corcoran
4/10/2016 5:25 PM

I have a message for you
I have a message for you
Modified by Admin Account 4/10/2016 5:24 PM

Accessing Candidate Portal analytics via Activities Entity

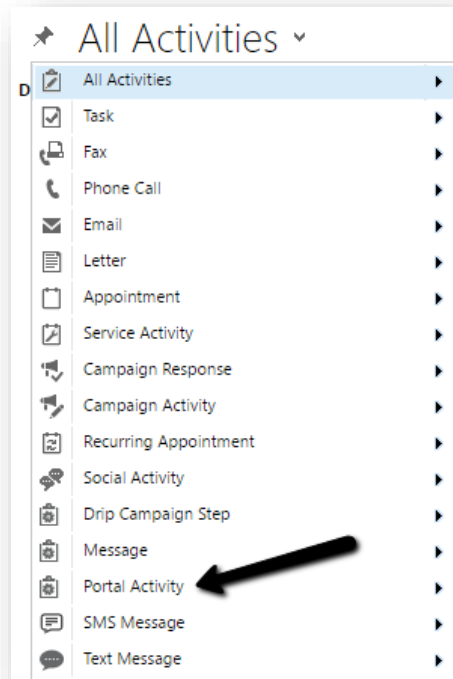
1. Select the Activities entity from the ribbon

Microsoft Dynamics CRM | FRANCHISE SALES | Dashboards

CONTACTS APPLICATIONS FRANCHISE DISCLOS... ACTIVITIES



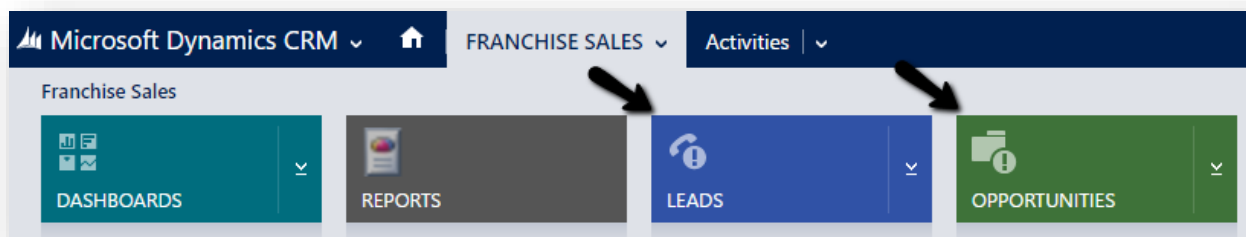
2. Change the view from All Activities to Portal Activities



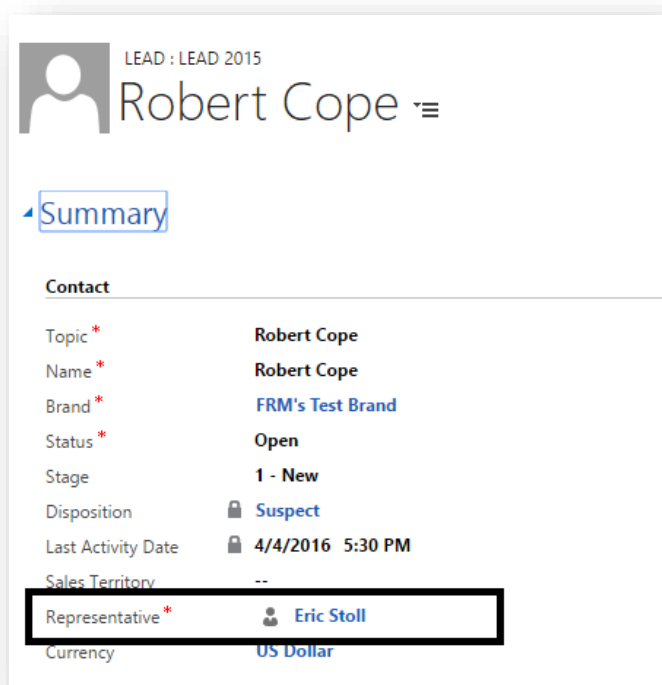


Assign Lead/Opportunity to another User

1. Select either the Lead or Opportunity from the ribbon

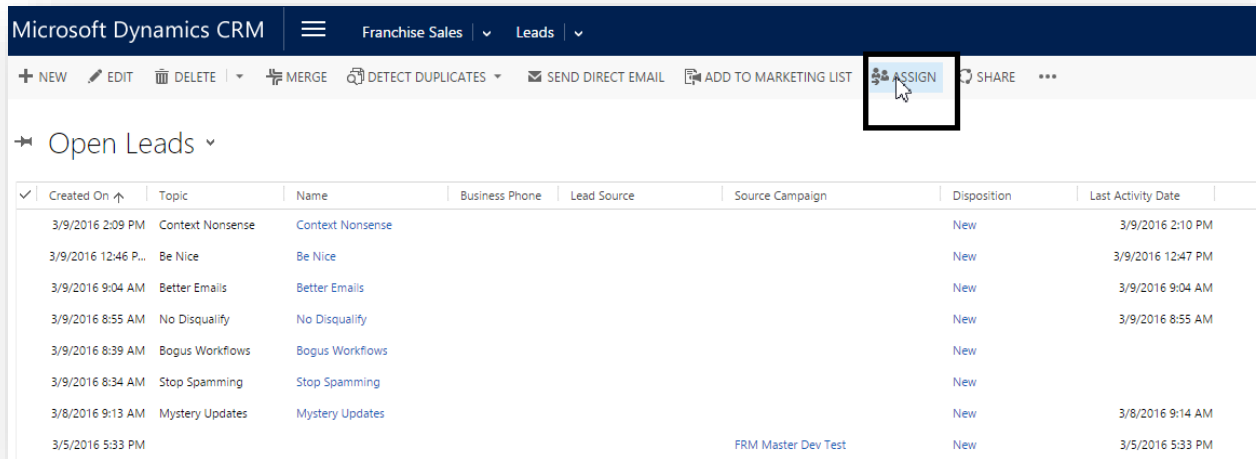


2. If you need to verify who is the current rep assigned to the lead, enter the lead and check under **Representative** for the name:

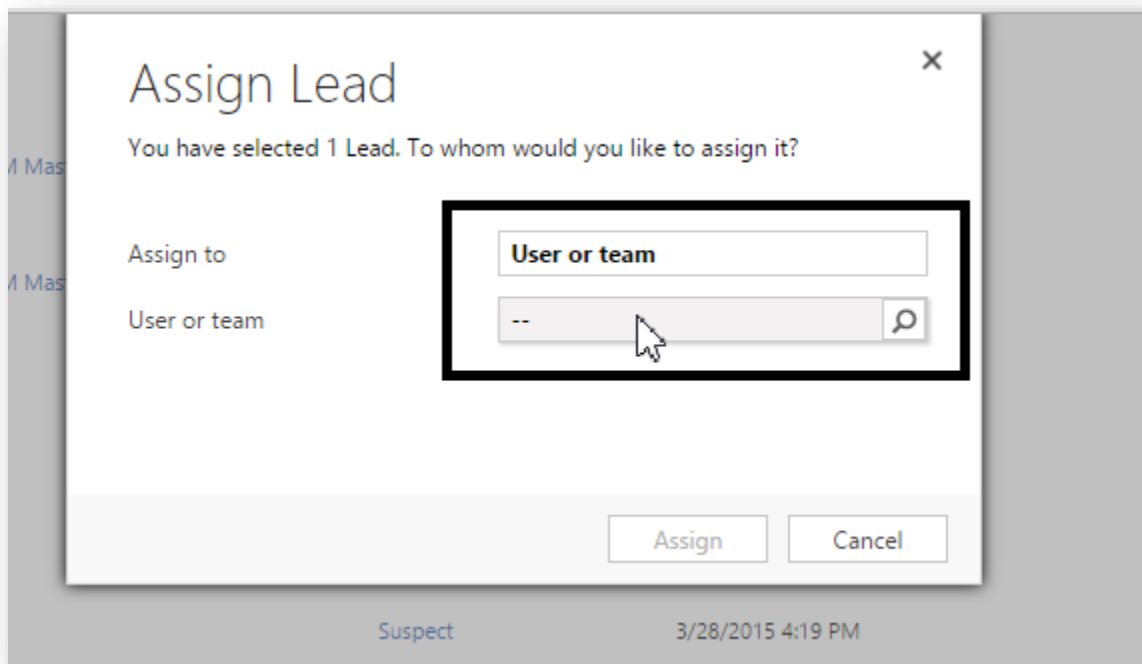




- From the Open Leads view, select the lead/s or opportunities you would like to re-assign and click “assign” in the ribbon. Please note, one can only assign leads or opportunities they are currently the owner of. Being an administrator in the system is an exception to this rule.



- In the pop-up window, select Assign to: **User or team** and search for the name of the rep that is to be assigned on this lead.

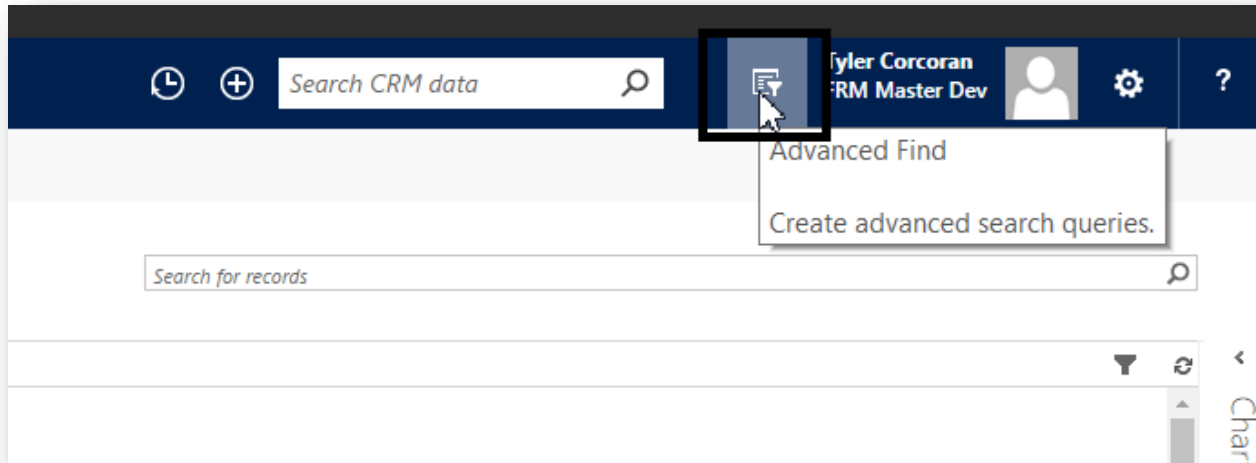




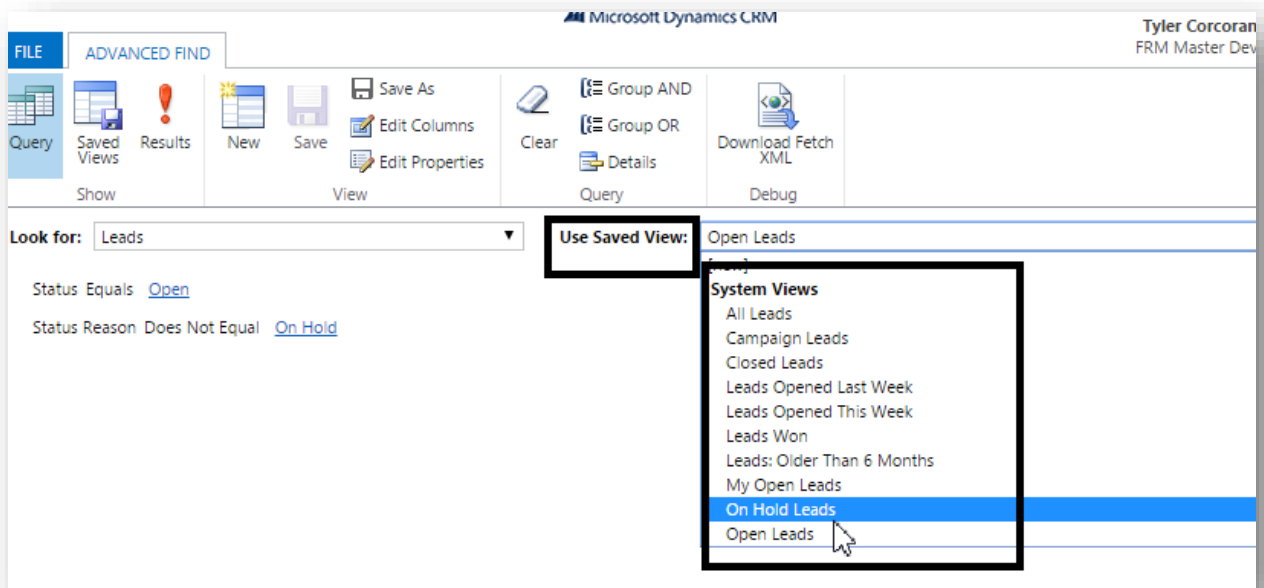
5. Click on **Assign** option to save the change.

Using Advanced Find to query Leads / Opportunities and reassign based on criteria

1. In the upper right side of the page, click on the **Advanced Find** icon:



2. **Advanced Finds** will begin with the view of the page you are on, but you have the option to modify this from the drop-down list with system views.





3. You will notice there are some predefined search criteria already in place:

Look for: Leads

Status Equals [Open](#)

Status Reason Does Not Equal [On Hold](#)

4. In order to add other search criteria, click on **Details** and select the new criteria at your choice.

Microsoft Dynamics CRM

Tyler Corcoran
FRM Master Dev

FILE ADVANCED FIND

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Download Fetch XML Debug

Look for: Leads

Status Equals [Open](#)

Status Reason Does Not Equal [On Hold](#)

Details
Hide the query lines from view.

Look for: Leads

▼ Status Equals [Open](#)

▼ Status Reason Does Not Equal [On Hold](#)

▼

Preferred Method of Contact

Purchase Process

Purchase Timeframe

Qualification Comments

Qualifying Opportunity

Rating

Record Created On

Related Campaign Response

Representative

Sales Stage (internal)

Sales Territory

Salutation

Schedule Follow Up (Prospect)

Schedule Follow Up (Qualify)



- Once you have added the new criteria, click on **Results** to retrieve the leads corresponding to the criteria you set:

crm2016/FRMMasterDev/main.aspx?extraqs=%3fDataProvider%3dMicrosoft.Crm.App

Microsoft Dynamics CRM

FILE ADVANCED FIND

Query Saved Views **Results** New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

Show View Query Debug

Look for: Leads Use Saved View: Open Leads

▼ Status Equals Open
▼ Status Reason Does Not Equal On Hold
▼ State Equals GA ...

Select

- Form this view you may select multiple leads and **assign** them to other users of the system

Microsoft Dynamics CRM

Tyler Co FRM Mast

FILE ADVANCED FIND LIST TOOLS LEADS

New Lead Edit Send Direct Add to Marketing List Mail Merge Follow Unfollow Collaborate Assign Leads Share Copy a Link Email a Link Run Workflow Start Dialog Run Report Excel Templates Word Templates

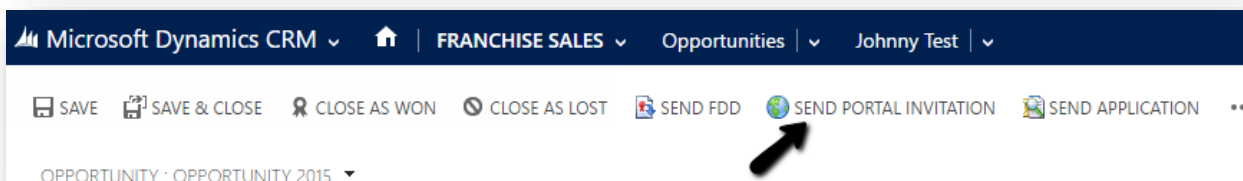
Records Actions Process Data

✓	Created On ↑	Topic	Name	Business Phone	Lead Source	Source Campaign
✓	3/28/2015 4:18 P...	Robyn Schley	Robyn Schley		Franchise Gator	
✓	3/28/2015 4:18 P...	Robin Winner	Robin Winner		brusters.com	
✓	3/28/2015 4:18 P...	Robert Cope	Robert Cope		Franchise Opportunities Ne...	
✓	3/28/2015 4:17 P...	Renita Muckle	Renita Muckle		Franchise Gator	
✓	3/28/2015 4:16 P...	Philanda Westbrook	Philanda Westbrook		brusters.com	
	3/28/2015 4:15 P...	Mitesh Patel	Mitesh Patel		Franchise Opportunities Ne...	
	3/28/2015 4:14 P...	Latrice Davis	Latrice Davis		Franchise Gator	



Invite Contact to Candidate Portal

1. Open the opportunity the prospect you would like to grant access is associated with
2. Click “Send Portal Invitation”



3. In the pop-up window there is an automatically generated password for the contact and you are required to enter a user name for the profile to be created. Please feel free to update the password as you see fit.

FRM - Setup Portal Access

Username

Enter the username (required)

Password

@{rZ}.n

Tip

First initial and last name is the recommended naming convention

Click to add comments

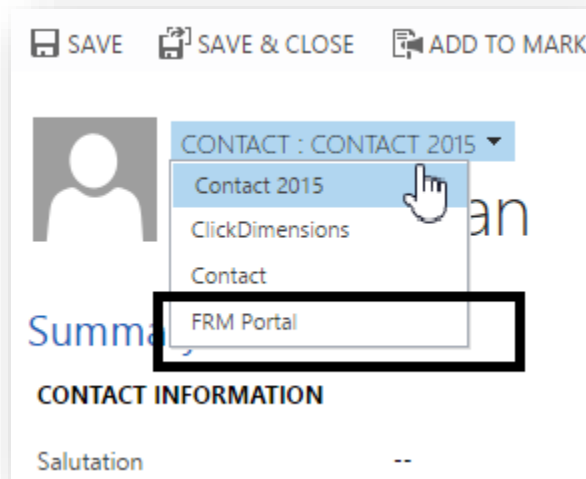
Help Summary Next Cancel

4. Click **Next** and then **Finish** options to save your actions.

When granting candidate portal access via the opportunity you are actually granting access to the contact (Potential Customer) associated with that opportunity.



If you would like to review or update the results open the contact record and switch from the “Contact Form” to the “FRM Portal” form.





Reset Contact's Candidate Portal Password

1. Open the contact that you would like to update
2. Select Reset Password from the ribbon

The screenshot shows a contact profile for Ty Corcoran. The ribbon at the top contains buttons for SAVE, SAVE & CLOSE, ADD TO MARKETING LIST, ASSIGN, DELETE, INVITE, and RESET PASSWORD. The RESET PASSWORD button is highlighted with a black rectangular box. Below the ribbon, the contact's name and a dropdown menu are visible. The 'Summary' tab is selected, and the 'CONTACT INFORMATION' section is partially visible.

3. In the pop-up window, enter the new password as desired and click on **Next** and then **Finish** to save the changes.

The screenshot shows a pop-up window titled 'FRM - Reset Portal Password' with a close button (X) in the top right corner. The window has a 'New Password Entry' section with a 'Password' label and a text input field containing 'jm:qwRdK'. A mouse cursor is pointing at the input field. To the right of the input field is a 'Tip' section with a right-pointing arrow and text explaining that the user's current password is shown and can be changed. At the bottom of the window, there are four buttons: 'Help', 'Summary', 'Next', and 'Cancel'. The 'Next' button is highlighted with a black rectangular box.



4. In order to verify if the password was changed successfully, you can access **FRM Portal** form on the contact.

CONTACT : FRM PORTAL

Ty Corcoran

General

First Name* Ty
Last Name* Corcoran
Email* tcorcoran@arke.com
Owner* Admin Account

Portal

Username corky
Portal Access Active

Password simple
Portal Administrator No

Change Contact's Candidate Portal Username

1. Click on the **Invite** option:

CONTACT : CONTACT 2015

Ty Corcoran

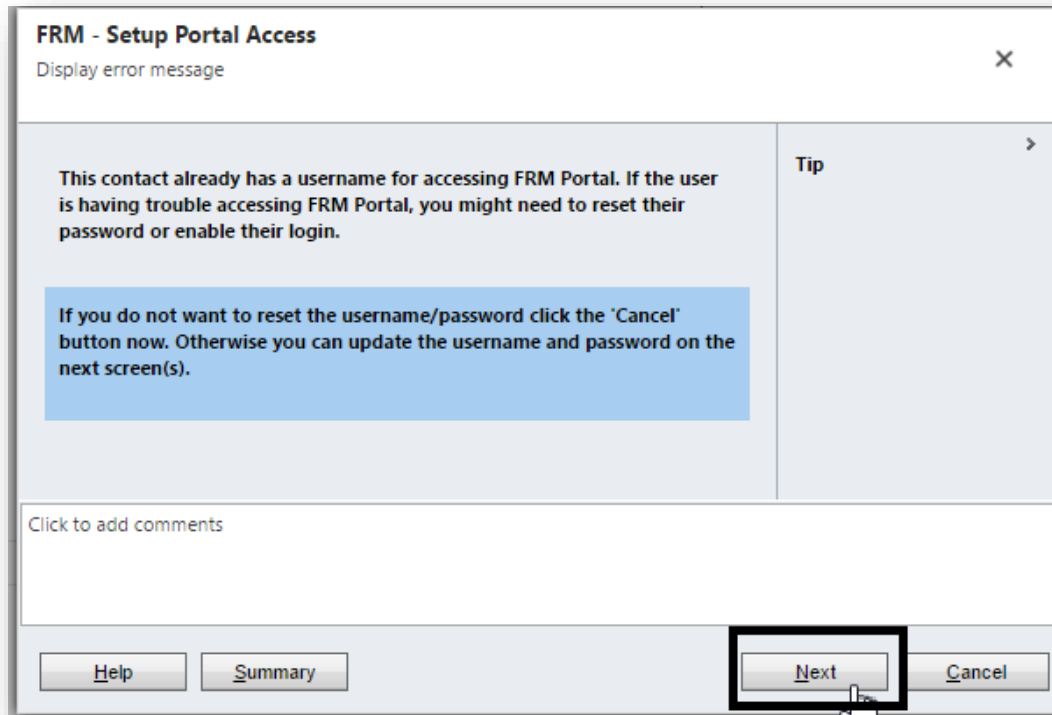
Summary

CONTACT INFORMATION

Salutation -- Job Title --



2. In the pop-up window, you will receive a message stating that the contact already has a username for accessing **FRM Portal** and that you can update the username and password on the next screen; Click on the **Next** button.





3. You are required to change the username but a password update is optional.
Please note, by clicking this a new password will be auto-generated. If you do not want to update the password, you must ensure their current password is entered otherwise it will be updated automatically to the new proposed password.

FRM - Setup Portal Access

Username

Enter the username (required)
Corky2

Password
i&O?DpaH

Tip
Do not use a standard password for all new users otherwise franchisees will figure out how to access each other's accounts

Click to add comments

[Help](#) [Summary](#) [Previous](#) **Next** [Cancel](#)

4. Click on **Next** and then **Finish** to save your changes.



5. You can track these changes under the **Activities** tab (located in the right side of the contact's page); here you will see notification emails from FRM about the changes you performed (e.g. password reset).

The screenshot displays the contact profile for Ty Corcoran. The top navigation bar includes options like SAVE, SAVE & CLOSE, ADD TO MARKETING LIST, ASSIGN, DELETE, INVITE, and RESET PASSWORD. The contact's name and a dropdown menu are visible. The main section is titled 'Summary' and contains 'CONTACT INFORMATION' in a table format. The 'ACTIVITIES' tab is selected and highlighted with a black box, showing a list of recent actions. The first activity is a 'Password Reset' notification from the 'Admin Account' to Ty Corcoran, dated 'Today'. The notification text includes a greeting, a statement about the password reset, the new password 'simple', and a login URL.

CONTACT INFORMATION			
Salutation	--	Job Title	--
Full Name*	Ty Corcoran	Relationship Type*	Prospect
Business Phone	--	Home Phone	--
Mobile Phone	--	Fax	--
Email*	tycorcoran@arke.com	Preferred Method of Contact	Any
Address	--		
Description	--		

RECENT OPPORTUNITIES

ACTIVITIES

- Admin Account**
FRM: Welcome to FRM Portal
Today
- Admin Account**
FRM: Password Reset
To: Ty Corcoran ;
Ty,
Your password for logging into the FRM Portal has been reset.
New password: simple
You can login at <http://portalurl> using your email address and the new password.