

# Springboard to Success

## Activities Book – Automating Data Refreshes

*In the past two sessions, you've identified the information that you want to keep updated. In this session, we will discuss how to set up a cadence of reminders and a method for your franchisees to update their own information.*

This book gives you the steps to:

- Make webforms that include the information to update
- Make campaigns that solicit updates
- Set workflows to trigger these campaigns automatically in the future

We invite you to use these instructions, to submit questions to [training@franconnect.com](mailto:training@franconnect.com), and if you're really really stuck, we invite you to schedule a 1:1 session with us to help you through these processes. You can schedule that time using this link: <https://tinyurl.com/677y7tz8>.

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## Make Web Forms that include the information to update

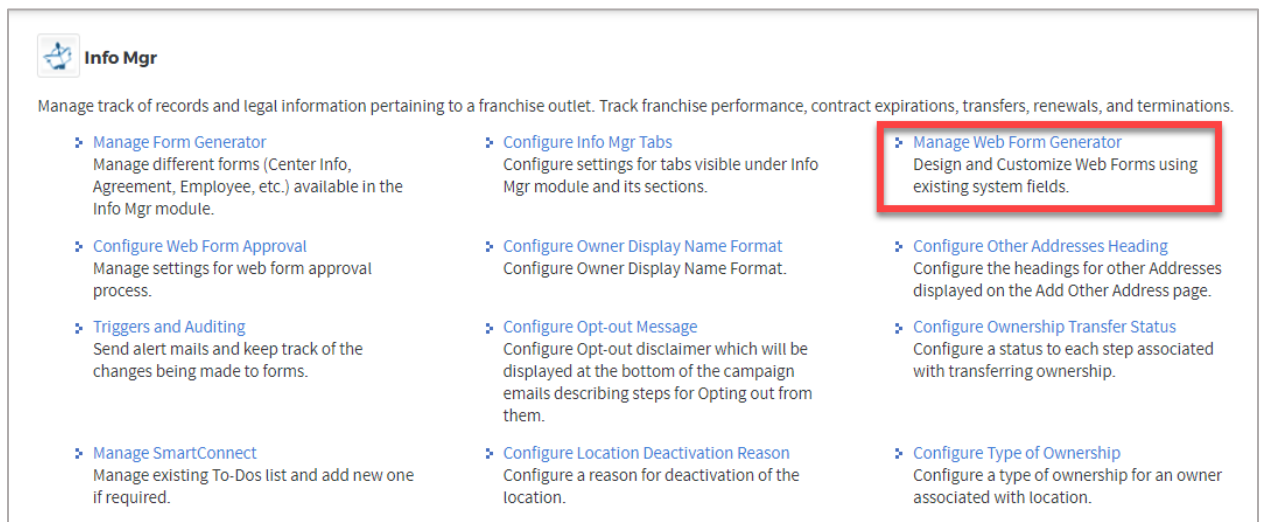
Sometimes, the easiest way to gather information from many or all franchisees is to have them submit the data. We recommend that to do this, you create a web form for them to complete, with the requested data. You'll map the data to existing fields in FranConnect, effectively giving your franchisees the ability to enter their own information directly to FranConnect. *Don't worry about them entering incorrect data – you'll have the opportunity to approve it before it goes into Information Manager, if you choose.*

*Before you create a web form, you'll need to know where in FranConnect this information will be stored. Start in Form Manager (covered in "Keep it Fresh and Clean") to ensure that the data you're asking for has a destination inside Information Manager before you build your web forms.*

### Creating Web forms

If you've used the standard web forms provided and find you need more for use on your website or via hyperlink to your leads, you can create web forms.

1. From Info Mgr in Admin, select **Manage Web Form Generator**.



The screenshot shows the 'Info Mgr' section in an admin interface. It features a grid of configuration options. The 'Manage Web Form Generator' option is highlighted with a red rectangular box. The interface includes a header for 'Info Mgr' with a brief description and a list of various settings, each with a blue chevron icon and a descriptive text block.

**Info Mgr**  
Manage track of records and legal information pertaining to a franchise outlet. Track franchise performance, contract expirations, transfers, renewals, and terminations.

- ❖ **Manage Form Generator**  
Manage different forms (Center Info, Agreement, Employee, etc.) available in the Info Mgr module.
- ❖ **Configure Web Form Approval**  
Manage settings for web form approval process.
- ❖ **Triggers and Auditing**  
Send alert mails and keep track of the changes being made to forms.
- ❖ **Manage SmartConnect**  
Manage existing To-Dos list and add new one if required.
- ❖ **Configure Info Mgr Tabs**  
Configure settings for tabs visible under Info Mgr module and its sections.
- ❖ **Configure Owner Display Name Format**  
Configure Owner Display Name Format.
- ❖ **Configure Opt-out Message**  
Configure Opt-out disclaimer which will be displayed at the bottom of the campaign emails describing steps for Opting out from them.
- ❖ **Configure Location Deactivation Reason**  
Configure a reason for deactivation of the location.
- ❖ **Manage Web Form Generator**  
Design and Customize Web Forms using existing system fields.
- ❖ **Configure Other Addresses Heading**  
Configure the headings for other Addresses displayed on the Add Other Address page.
- ❖ **Configure Ownership Transfer Status**  
Configure a status to each step associated with transferring ownership.
- ❖ **Configure Type of Ownership**  
Configure a type of ownership for an owner associated with location.

2. FranConnect has some web forms pre-built. If you'd like to start with one of these, choose the form from the action wheel to the right of the form name. If you're making a new form from scratch, click **Create New Form**.

Admin > Info Mgr > Manage Web Form Generator

**WEB FORMS** | [Create New Form](#)

Form Name	Created By	Form Format	# of Columns
<a href="#">General Liability Insurance</a>	FranConnect Administrator	Single Page	2
<a href="#">Franchisee Center Information Update</a>	FranConnect Administrator	Single Page	1
<a href="#">Feedback Information *</a>	FranConnect Administrator	Single Page	2

3. Input the **Basic Details**: note that when you click Save & Next the drop-down selections cannot be changed.
  - Form Name: The internal name used for this form.
  - Form Title: The name of the form the lead will see if the Display Form Title box is checked.
  - Form Description: Details about the form and its use.
  - Form Format: The number of pages you want the form to have. Pages appear as tabs at the top of the form. They are best used for multi-page application forms.
  - Approval required: This is where you set whether you want to review information inputted on the form before it goes into Info Manager. Check the box to have the information go into a queue for approval; leave it unchecked for the information to go directly into Info Manager.
  - # of columns: The number of columns you want the page to have. Most forms have 2 columns.
  - Default Field Label Alignment: Where you want the field name to be situated, either to the left of the field or on the top of the field. To the left of the field is most common.
  - Form Language: The language you want displayed on the form.
  - Iframe Width: The dimensions of the form.
  - Iframe Height: The dimensions of the form.
  - Form URL: The extension you want to use for the form (e.g. if you were creating the Lease Renewal Date form you would input **leaserenewal**).

\*Form Name : Demo Form

\*Form Title : From to demonstrate web form capabilities

Display Form Title

Form Description :

Form Format : Single Page  Approval Required

# of Columns : 1

Default Field Label Alignment : Left

Form Language : English

iframe Width : 100%

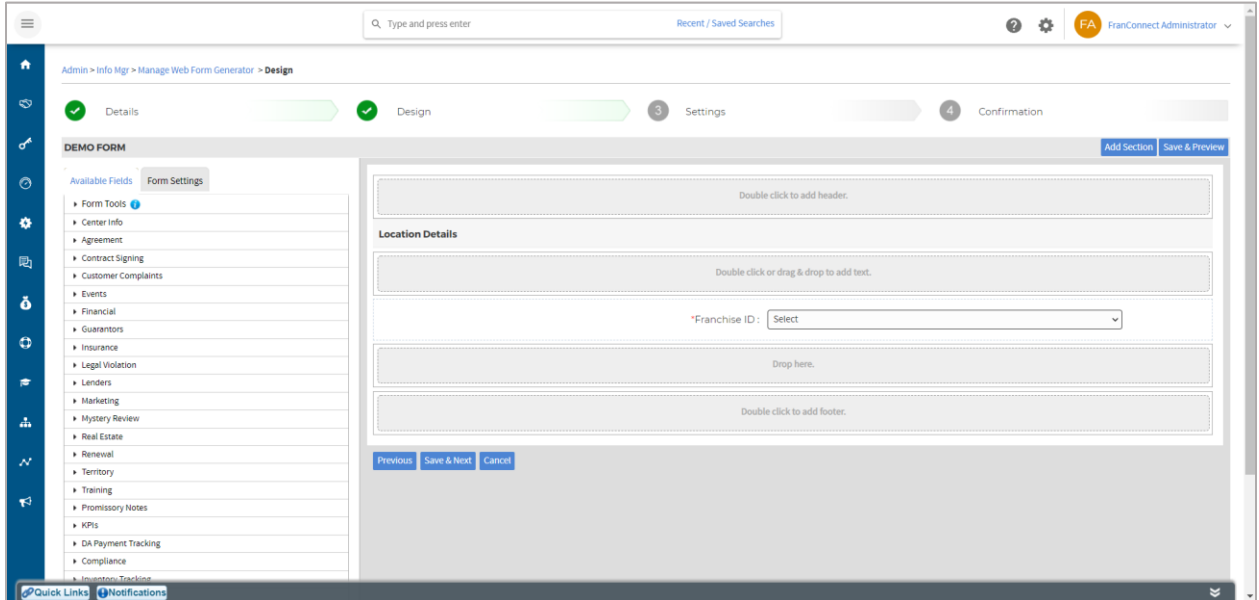
iframe Height : 500

\*Form URL : <https://salesdemosetrg1.franconnectdemo.net/fc/extforms/>

*Avoid using <space> and special characters like ! @ % # \$ ^ & \* \_ ; , ; < > |.*

4. Click **Save & Next**.

- The First Name, Last Name and Email will appear as required fields. The remaining fields of the form will need to be added. From the left-hand column, Available Fields, expand the area you want to add fields from. This list includes all the fields available for locations in Info Manager – if you added tabs or fields, you should see them in this list.



- Click on the field you want to move to the form, drag and drop it into one of the boxes that say “drop here.”

Note: On an Info Manager form, the Franchise ID field is always included, so that FranConnect knows which franchise record this data applies to. If you use this form on a web page or as a direct link in an email you send out, franchisees will need to select their Franchise ID on this page.

To pre-fill this by Franchisee, include the web form in a Campaign – FranConnect will know who the email went to and pre-fill that field.

- Continue to drag and drop fields until the form contains all of the information you want to capture.

The screenshot shows a form builder interface with a central form area. At the top, there is a header section with the text "Double click to add header." Below it is a text section with "Double click or drag & drop to add text." The form contains several input fields: "First Name" (required), "Last Name" (required), "Email" (required), "Mobile", "Address1", "Address2", "City", "State / Province" (dropdown), "Zip / Postal Code", and "Country" (dropdown). There are two "Drop here." sections and a footer section with "Double click to add footer."

- If you want to add sections to your form, you can do so by selection **Add Section**.

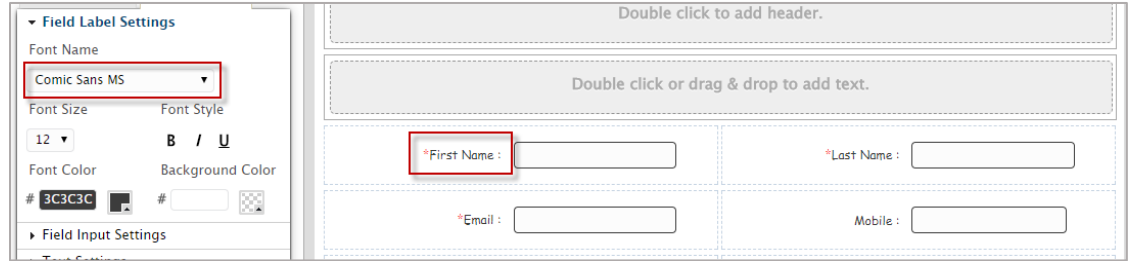
The screenshot shows a form builder interface with a form area containing a header section with "Double click to add header." On the right side, there are two buttons: "Add Section" (highlighted with a red box) and "Save & Preview". On the left side, there is a sidebar with "Available Fields" and "Form Settings" tabs, and a list of settings: "Field Label Settings", "Field Input Settings", "Text Settings", "Section Settings", "Form Settings", and "Button Settings".

- You can remove fields by hovering over the field and deleting by using X.

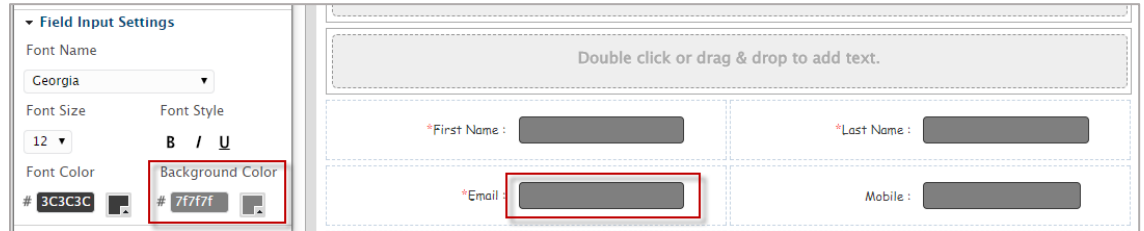
The screenshot shows a form builder interface with a form area containing a header section with "Double click to add header." Below it is a text section with "Double click or drag & drop to add text." The form contains several input fields: "First Name" (required), "Last Name" (required), "Email" (required), "Mobile", "Address1", "Address2", "City", and "State / Province" (dropdown). A red box with an 'X' is positioned over the "Address1" field, indicating it is being deleted.

10. From the left-hand column, select **Form Settings**. Use the settings to make edits to the form appearance.

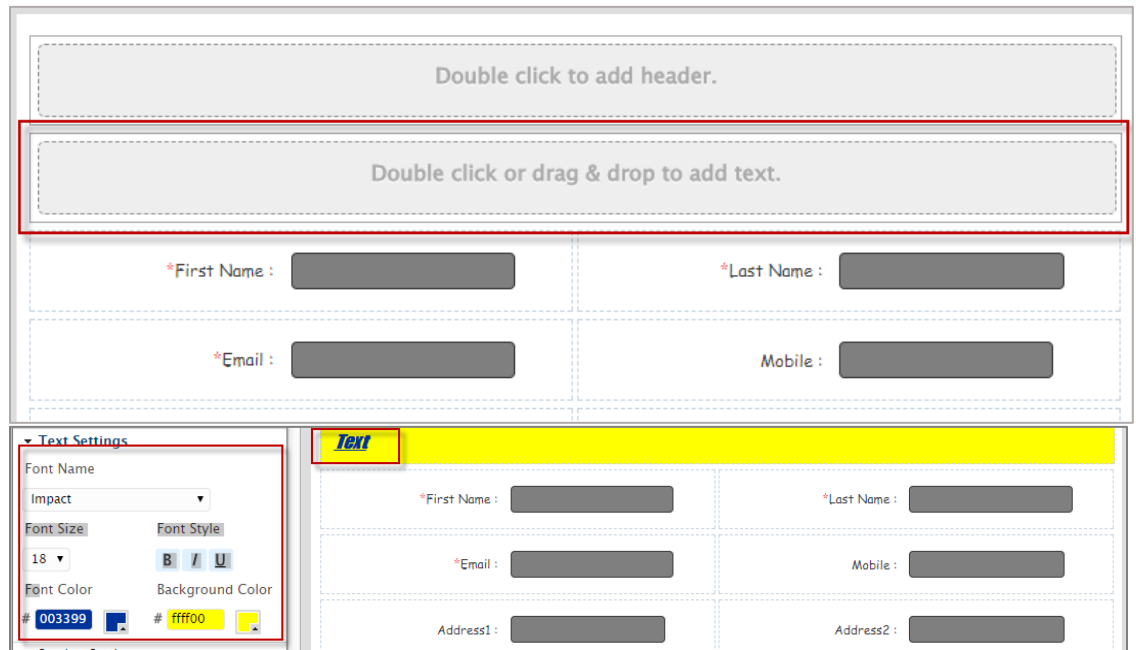
- **Field Label Settings:** Allows you to change the font options for the field's labels.



- **Field Input Settings:** Allows you to change the font options for the text inside the box (the lead response text).

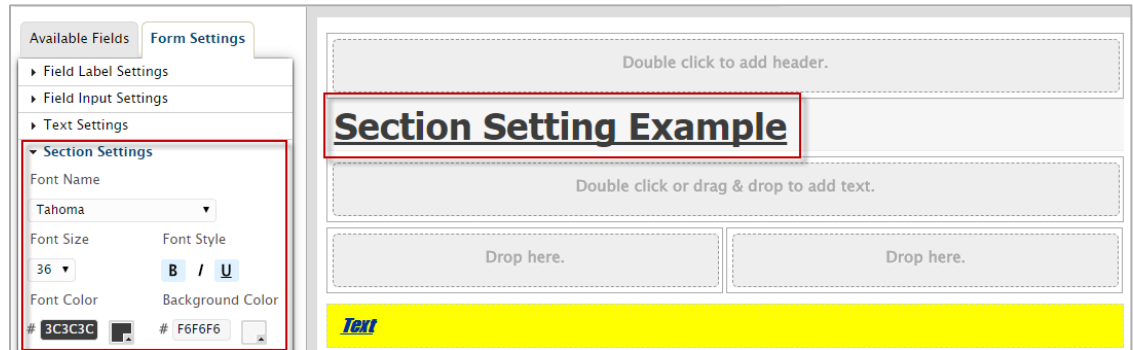


- **Text Settings:** Allows you to edit the font text above the form fields.

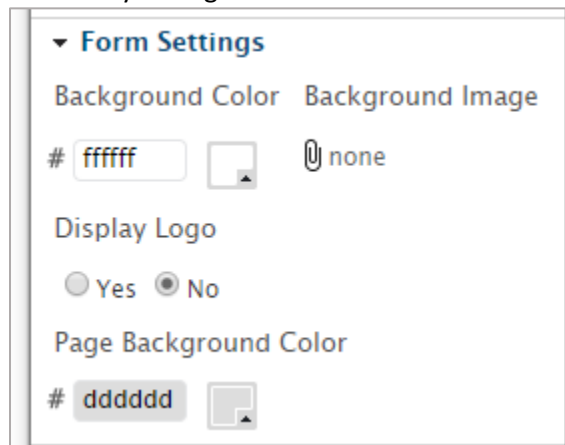




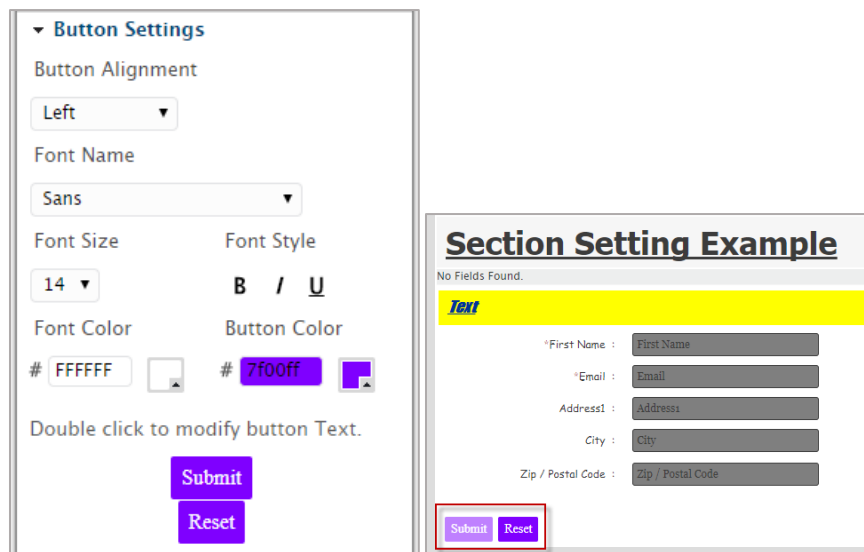
- Section Settings: Allows you to modify the section header font.



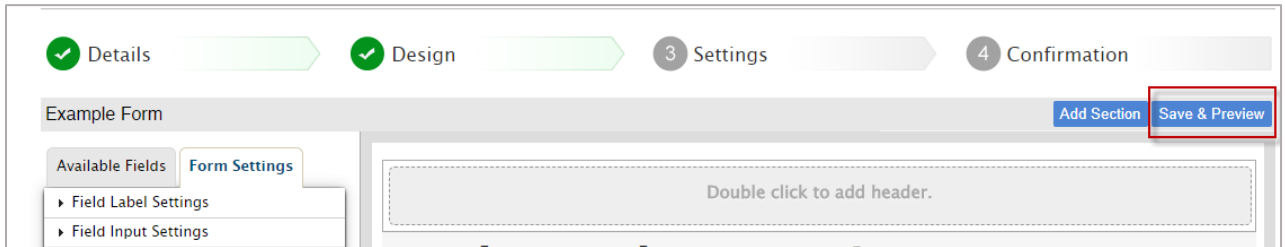
- Form Settings: Allows you to change the background color, background image, display logo and page background color. You will need to know your hex colors for a perfect match to your logo.



- Button Settings: Allows you to edit the font style and location of buttons on the page.

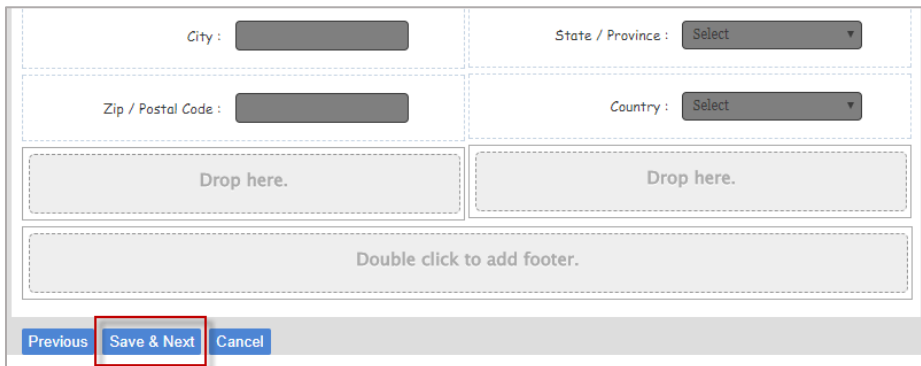


11. When you have completed making edits to your form, click **Save & Preview** to review.



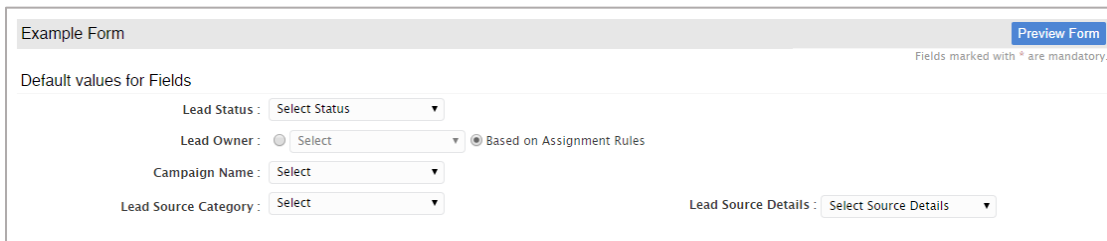
The screenshot shows a progress bar at the top with four steps: 1. Details (checked), 2. Design (checked), 3. Settings (active), and 4. Confirmation. Below the progress bar, there is a header area with a 'Save & Preview' button highlighted in a red box. The main area shows a form design with a header section containing the text 'Double click to add header.' and a footer section containing the text 'Double click to add footer.' On the left, there is a sidebar with 'Available Fields' and 'Form Settings' tabs, and a list of settings including 'Field Label Settings' and 'Field Input Settings'.

12. If you are happy with your edits click, **Save & Next**.



The screenshot shows a form design with several input fields: 'City', 'State / Province', 'Zip / Postal Code', and 'Country'. There are two 'Drop here.' sections and a footer section with the text 'Double click to add footer.'. At the bottom, there are three buttons: 'Previous', 'Save & Next' (highlighted in a red box), and 'Cancel'.

13. The Settings page allows you to configure how you want the system to respond once the web form is submitted by the lead. The default fields at the top of the page will prefill for the lead with the values you configure. The lead will receive the message you configure at the bottom of the page after they submit the form. If you plan to use a Workflow with the form you are creating, the top of the page can be left without selections as seen below.



The screenshot shows the 'Settings' page for the form. It has a header area with 'Example Form' and a 'Preview Form' button. Below the header, there is a section titled 'Default values for Fields' with a note 'Fields marked with \* are mandatory.'. The settings include: 'Lead Status' (dropdown), 'Lead Owner' (radio buttons for 'Select' and 'Based on Assignment Rules'), 'Campaign Name' (dropdown), 'Lead Source Category' (dropdown), and 'Lead Source Details' (dropdown).

14. Click **Finish**.

15. Once you have completed the design of the form, the Confirmation page will present you with the IFrame Embed Code or the Host URL. Use the IFrame Embed Code to input the form on your

webpage (you may need to provide it to your web designer). Use the Host URL as a hyperlink for use in an Email Template or marketing message.

Iframe Embed Code  Host URL

Iframe Embed Code

To embed this form on your webpage, stream or blog post using an iFrame, copy and paste the code below:

```
<iframe frameborder='0' width='100%' height='500' src='https://gingerbreadtraining.franconnect.net/fc/extforms/exampleform?refLoc=ifrm' title='Example Form'></iframe>
```

[Previous](#) [OK](#)

Iframe Embed Code  Host URL

Host URL

To link to the form from another web page or to send the form via email, use the URL below:

```
https://gingerbreadtraining.franconnect.net/fc/extforms/exampleform
```

[Previous](#) [OK](#)

16. Click **OK**. You will be taken back to the Manage Web Form Generator page.

## Make Campaigns to Trigger Updates

### Using the Info Mgr Campaign Center

#### Campaigining Franchisees

Campaigining your franchisees is a great way to keep them up to date with things that are going on inside the franchise organization. The basis for any campaign is the template or email.

#### Best Practices for email templates

When designing email templates, keep in mind that you're sending to a wide variety of recipients, and you want your message to get into the most inboxes possible (not to be trapped by spam filters), and to look good to the most people when it gets there, so that they can and will read it. Once they have read it, you want to point them smoothly to the action you want them to perform.

#### Template Contents and Design

**Grab Them in the Subject Line:** Pay special attention to the subject line of your email, since that may be all of it that your contacts see at first. Customize the subject line to be relevant to your call to action, and have a personal connection to the contact. Use the keyword in your subject line if possible to make to personalize your appeal. This will help to improve the delivery rate of your campaign and reduce the rate at which it gets trapped in spam filters.

**Keep it compact:** many emails come back undeliverable due to size restrictions by the recipients' servers. To maximize successful delivery, try to keep the whole email size (including attachment, if any) within 5 MB. Ideally, Email contents for email marketing should be less than 1 MB.

**Image-to-Text ratio:** A 60/40 text to image ratio should be maintained for best results. Recipients are less engaged with long, text-heavy emails, and lots of text can prevent them from easily seeing and heeding your call to action. Image file sizes need to be considered because a mobile device will not load images as fast as a desktop or laptop. Large images in your template and large attachments will impact the email's size, and therefore the delivery success rate of your campaign. Try to keep the size of each image at 20k or less. Do not use Flash or gif animations - they won't work and just add to the overall file size of the email.

## Recommended image sizes for email templates:

- Banner image width - 600px
- Image size for one column - 574px
- Image size for two column - 274px
- Image size for three column - 174px
- Recommended file size - below 1mb (not more than 5mb)
- Recommended file resolution - 72 PPI
- Color mode - RGB
- File Type - JPG, PNG

**Optimize your calls-to-action (CTAs)** - In the email content, there should be very specific and limited "Call to Action" links or buttons. Emails containing more links are often marked as spam based on recipient server spam filter settings.

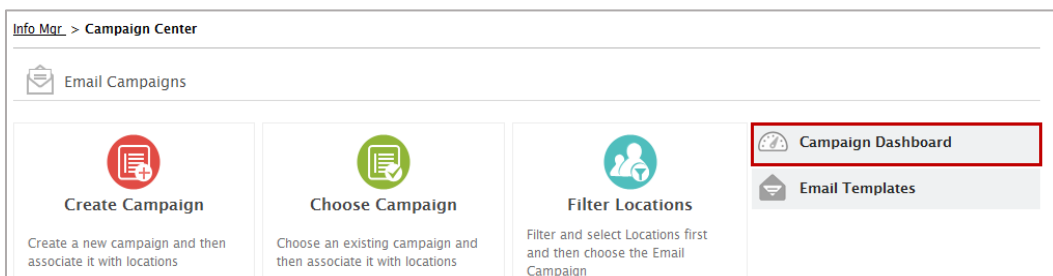
**Keywords:** using keywords can give your email a personal touch, but for large campaigns they can also slow down the delivery rate of emails. Use fewer keywords based on email content ratio, and your campaigns will be sent at a faster rate.

**Alt tag usage** - Alt tags are snippets of text related to an individual image that are commonly used in email so that before an image loads, the user has an idea of what the image is, what the offer might be, or the overall theme of the email. You can define alt text in the template using the editor.

**Save time and reinforce your branding by re-using Existing Templates** - Select an existing template and use 'Copy and Customize' to create a new template. *Don't forget to change the subject line and make sure to update the email subject to make it more personalized*

## Creating a Franchisee Campaign

1. Click on the **Information Manager** module, and select **Campaign Center** page.
2. Click on **Campaign Dashboard**.



3. When you click on the **Campaign Dashboard**, the following screen will appear:

Info Mgr. > Campaign Center > Campaign Dashboard

**All** Promotional Regular Campaign Archived Campaign Tracking Create Campaign

This page shows all types of Campaigns.

Campaign Name Creation Date Sort By  
 Search on Campaign Name All Select  
Search

Items 1 - 1 of 1

Training update (Created on : 01/27/2016 02:07 PM)

Template Name	Template Subject	Email Sent	Read	Errors		
Alan Training temp	web training today	397   23	10   1	0   0	Modify	
Taryn Smith Training Template	Training	396   23	6   1	0   0	Associate with Locations	0   1
Richard Training Template	Routine call for students	1   0	0   0	0   0	Stop Campaign	395   24

Cancel

**All:** The list of all created campaigns will be displayed here.

**Promotional:** The list of all promotional activities and seasonal offers will be displayed here.

**Regular Campaigns:** The list of all series of templates will be displayed here.

**Archived:** The list of campaigns which are archived by a user will be displayed here.

**Campaign Tracking:** All the actions performed on campaigns will be displayed here.

- a) Click the desired campaign type and then click on the action wheel.
- b) When you click on the **Action wheel**, you will see the options to **Modify**, **Associate with Locations** and **Stop campaign**.

### Modify

1. When you click on the **Modify** option, the following screen will appear:

Info Mgr > Campaign Center > Add Campaign

Fields marked with \* are mandatory

### Step 1 : Campaign Details

\*Campaign Name : Training update

\*Description : Send invites to the first 90 days training sessions

\* Campaign Type :  Promotional Campaign (Multiple promotional campaigns can be associated with a single Locations).  
 Regular Campaign (Single Regular campaign can be associated with a Locations at a timeAAA).

*Read here ,the differences between Promotional Campaign and Regular Campaign.*

### Step 2 : Associate Templates

Please select the templates which will be a part of this campaign and specify their delivery sequence


Alan Training temp  
Taryn Smith Training Template  
Richard Training Template

Associate Template(s) Remove Template

### Step 3 : Campaign Delivery Details

Name which would appear in the From header of Email  Logged in User's Name  Custom

Email to which the recipient will reply  Logged in User's Email  Custom

\*Start Date 01/27/2016 

Send the first Email as soon as Campaign is associated with Locations :  Yes  No (Send on fixed time) After (Days) : 30 Time : 05:00 AM

Days Gap for next Emails :  Constant  Variable  All in same day

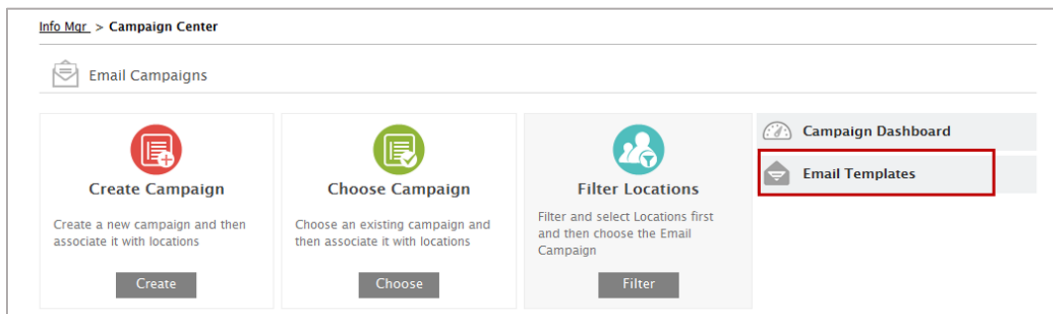
Specify days gap between each Email : 30 Email Send Time : 05:00 AM

Modify Cancel

- a) Enter the name in the **Campaign Name** field to update the name of your campaign. Enter the description associated with the campaign in the **Description** field.
- b) Select the **Campaign Type** by selecting the radio button next to the preferred campaign type.
- c) Now select the template which will be a part of this campaign and specify their delivery sequence.
- d) To add more template in the list, click **Associate Template** and to remove a template, select the template and click **Remove Template**.
- e) The **Name Which Would Appear in the From Header of Email** can be set as Logged in User's Name or can even be customized by selecting the corresponding radio button.
- f) **The Email to Which the Recipient will reply** can be set as Logged in User's Email or can even be customized by selecting the corresponding radio button.
- g) To change the start date of the campaign, click on the **Calendar** icon.
- h) After updating the details, click **Modify**, or to discard the changes, click **Cancel**.

## Updating an Information Manager Template

1. Click on the **Information Manager** module, and Select the **Campaign Center** page.
2. Click on **Email Templates**.



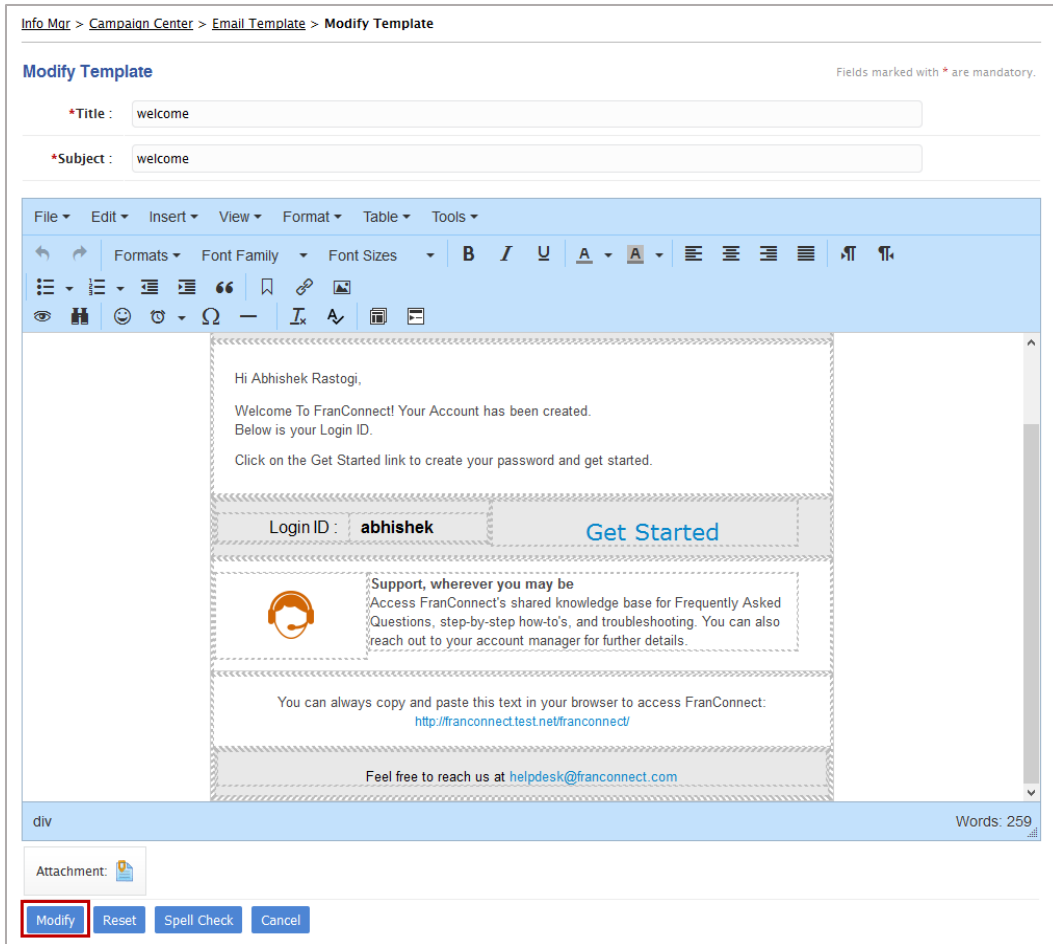
3. When you click on the **Email Templates**, the following screen will appear:

The screenshot shows the 'Email Templates' list view. It includes a search bar, a table of templates, and a pagination control. The 'Action' column for the first row is expanded, showing options: 'Modify', 'Delete', 'Test this Template', and 'Copy'. The 'Modify' option is highlighted with a red box and a red arrow.

Template Title	Format	Creation / Last Updated Date	Created / Last Updated By	Action
welcome	Graphical Template	07/07/2016 09:37 AM	Franconnect Administrator	Modify
col2	Graphical Template	06/28/2016 09:55 AM	Franconnect Administrator	Delete
User Notification x1	Graphical Template	06/27/2016 02:22 AM	Franconnect Administrator	Test this Template
User Notification Template 2	Graphical Template	06/20/2016 03:01 AM	Franconnect Administrator	Copy
table	Graphical Template	05/17/2016 01:33 AM	Franconnect Administrator	
User Notification Template	Graphical Template	05/04/2016 08:26 AM	Franconnect Administrator	
tb1	Graphical Template	05/04/2016 06:52 AM	Franconnect Administrator	

- a) Click on a Template name to view information associated with it.
- b) When you click on **Action wheel** of any template, you will see the options to **Modify**, **Delete**, **Test**, and **Copy** the template.
- c) To update the template, click on the **Modify** button. After clicking the Modify button, you will see the following screen:

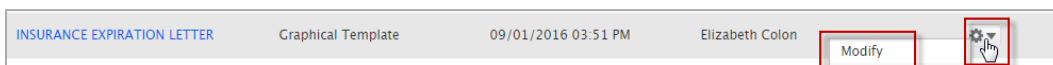




Modify the template as per your requirement and click **Modify**.

## Editing Email Templates

1. Click on the **Information Manager** module, and Select the **Campaign Center** page.
2. Select **Email Templates**.
3. Choose the template you wish to personalize.
4. From the action wheel Click **Modify**.



5. Make changes as needed to customize the template to your organization.
6. Click **Modify**.

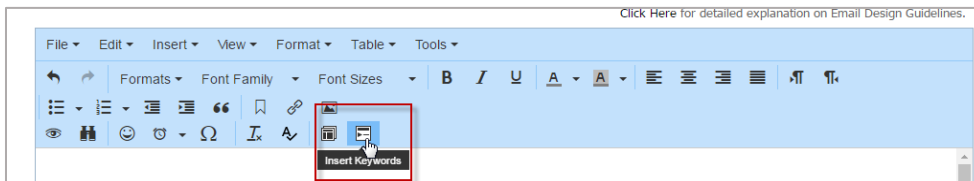
## Replacing template text with your franchise information

1. Click on the red text that reads [Your Franchise Name].
2. Delete [Your Franchise Name] and replace it.
3. Click on the red text that reads [Your WebsiteName]
4. Delete [Your WebsiteName] and replace it.
5. Click **Modify** to save your changes. You may need to re-open the template from the action wheel to make further edits.

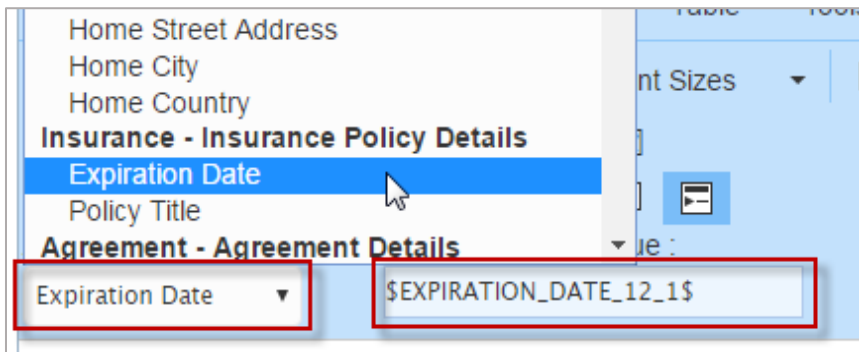
### Adding additional desired owner keywords

Keywords are place-holders for specific details that you will include in communications, such as renewal date or insurance expiration date. When the message is sent, the actual information replaces the placeholder, as it would be in a “mail merge” in a word processing system. To insert keywords in a template:

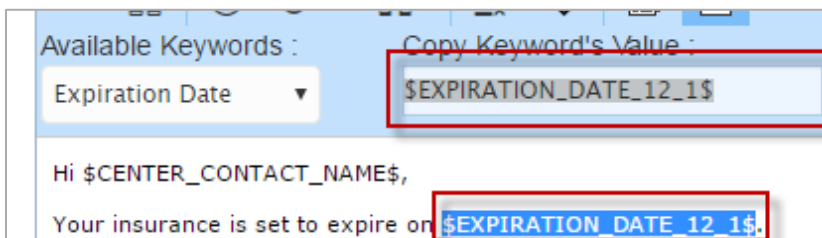
1. Click the **Insert Keywords** icon.



2. Select the keyword you want to enter from the **Available Keywords** dropdown.



3. Copy and paste the keyword into the body of the template.

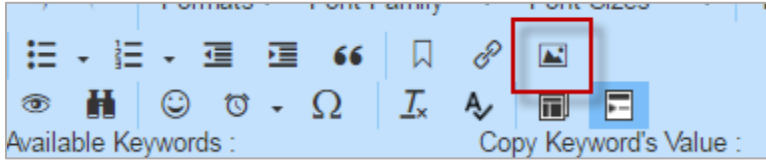


4. Complete any additional edits.

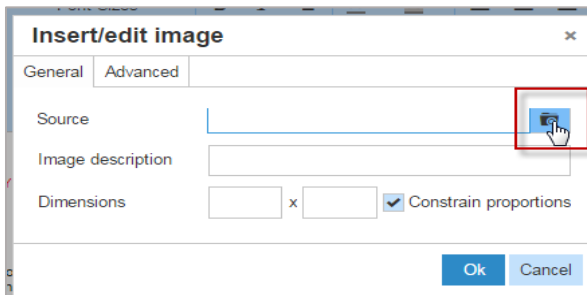
5. Click **Modify**. You may need to re-open the template from the action wheel to make further edits.

## Adding Images to templates

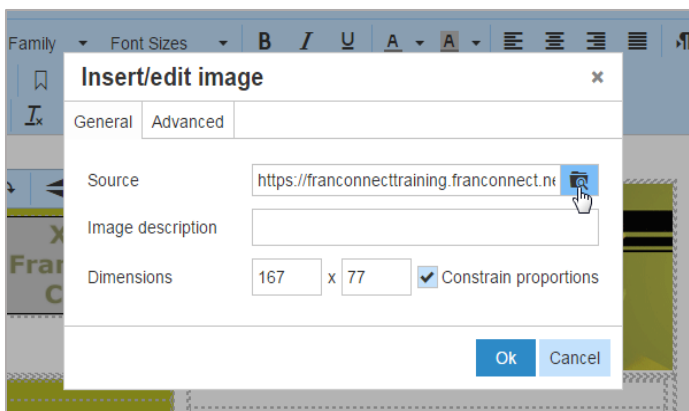
1. From the area of the email where you wish to insert a logo or image, click the picture icon.



2. Select the icon to browse your computer.



3. Choose your logo from your computer.
4. Click **Open**.
5. Add an **Image description**.
6. Edit the **Dimensions** as needed.
7. Click **Ok**.

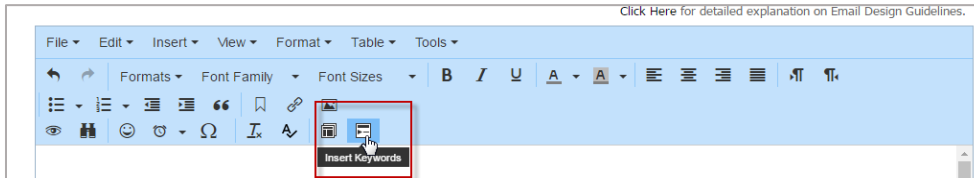


8. Complete any additional edits.
9. Click **Modify** to save this change. You may need to re-open the template from the action wheel to make further edits.

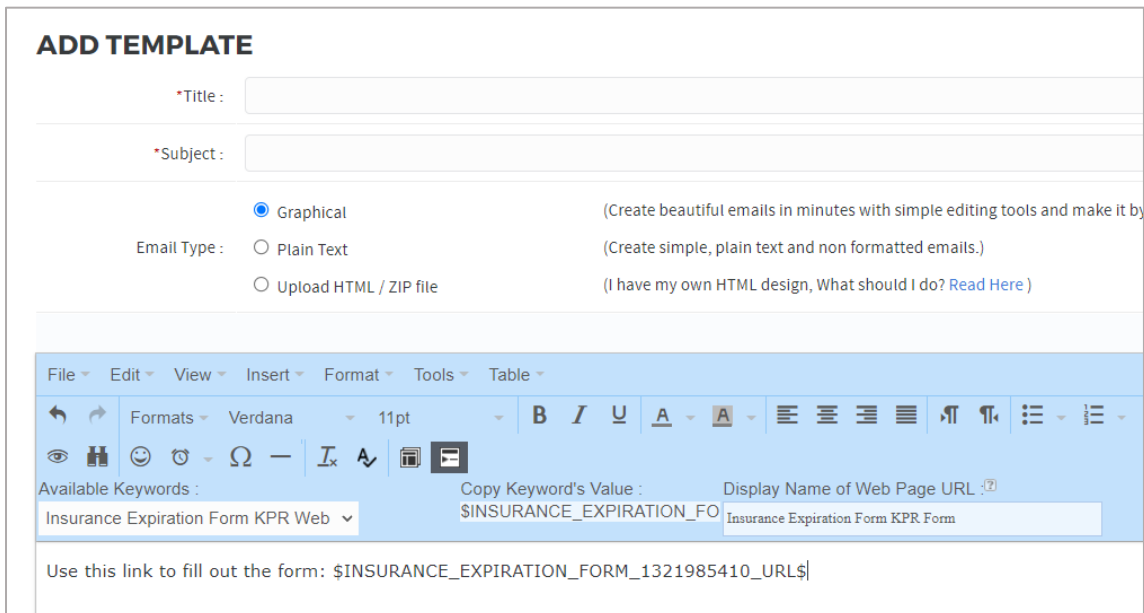
## Including Web Forms in Campaigns

When you include a web form in your campaign, there are two ways to include it. Best practice is shown below, where the Franchise ID information is prefilled in the form. NOTE: If you simply include the URL of the form in the email, the franchisee will need to select their unit from a drop-down list. This can lead to data being submitted against the wrong franchise. To insert a web form in an email:

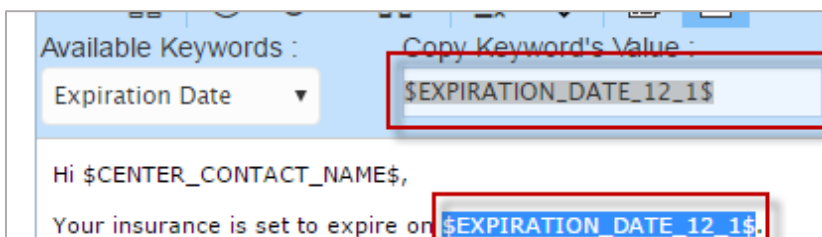
1. Click the **Insert Keywords** icon.



2. In the **Available Keywords** dropdown, you'll be able to select your web form. If the web form is included this way, it will prefill the franchisee information in the form.



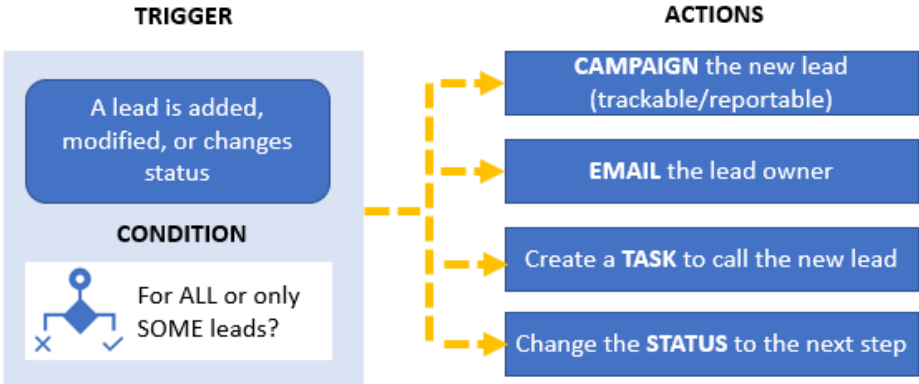
3. Copy and paste the form name as though it were a keyword into the body of the template.



4. Complete any additional edits.
5. Click **Modify**. You may need to re-open the template from the action wheel to make further edits.

# Set Workflows to Trigger Campaigns Automatically

Workflows set up actions that can be kicked off automatically, based on another (triggering) action that takes place in FranConnect. You can choose for an action to happen for all leads or locations, or you can have it happen to only seom locations, based on conditions. The illustration below shows an example of what might be automated for a new lead coming into the system.



The **trigger** is the event that kicks off the workflow actions. You can trigger a workflow in different cases, depending on which module you’re working in. The chart below shows what triggers can be used in each module that has workflow capability.

Information Manager
<b>Record is added/modified</b>
<b>Based on date associated with record</b>
<b>Events:</b>
Location signs FDD
Location fills out specified web form
First activity logged
Specified campaign is sent
Call is logged
Email is sent
Data update request approved/rejected
Location transferred/terminated
Last contacted date is past N days
Last visit date is past N days
Visit scheduled/completed
Customer complaint is logged

**Conditions** let you target specific leads or locations to have the action performed. For example, not ALL killed leads would warrant a follow-up campaign, but it might be desirable to send a 90-day follow-up email to leads who were killed for non-response, or who indicated that they were deferring their decision. The chart below shows what conditions can be used in each module that has workflow capability.

Information Manager
<b>Franchisee Type: one or more</b> <ul style="list-style-type: none"><li>• Corporate</li><li>• Active</li><li>• In Development</li></ul>

**Actions** are the instructions you give for what happens when the conditions are met. The same workflow can kick off several actions, for example sending an email to a lead and adding a task to the lead owner to follow up with a call. The chart below shows what actions can be used in each module that has workflow capability.

Information Manager
<b>Send Email</b> <b>Send Campaign</b> <b>Create Task</b>

**Create task:** You can create a task, designate a task type and a priority, and assign it to the lead owner by role, or to one or more people explicitly from a list. You can schedule that task to happen immediately, after an interval, or have no due date (a “timeless” task).

**Change status or candidate portal status:** You can advance a lead along the sales pipeline by assigning a new status from the list.

**Send email:** You can send an email to anyone you designate. Note: typically, this is used for internal emails only, because no tracking statistics apply to an email created in the workflow directly.

**Send email campaign:** You can set up one email or a series of emails to be sent to recipients you designate. You can also report on the results of the emails, making this a preferred way to send emails to leads or franchisees.

Detailed steps for creating these actions can be found in the Help Center, accessible from the FranConnect product.

## Determining which workflow to use

There are three different type of workflows.

1. **Standard:** Allows you to trigger a system function when a record (Lead) is added, modified or added and modified. This is the most basic workflow and is the foundation for your welcome campaign. For example, when a record is added into FranConnect the Lead will receive the welcome campaign.

2. Event based: Allows you to trigger a system function when an event takes place. This provides for an advanced level of automation. For example, when the Lead fills out the Application Webform, their status is changed to application received and the Lead owner receives a task to review the application.
3. Date Based: Triggered on a specific date associated with a record.

## Creating a Workflow

1. From Workflows, click **Create Workflow**.
2. Name the workflow using the **Workflow Name** field. For Example, Application Status Change Workflow.
4. Click **Event Based**. Event based workflows allow you to trigger a system function when a system event takes place. This provides for an advanced level of automation. For example, when the Lead fills out the Application Webform, their status is changed to application received and the Lead owner receives a task to review the application.
5. Click **Next**.

**Create Workflow**

Fields marked with \* are mandatory.

Workflow Name \*

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**Workflow Type**

**Standard**  
Triggered when a record is added or modified.

**Event Based**  
Triggered by an event on the record, like when a specific web form is filled, first activity is logged, FDD is signed, etc.

**Date Based**  
Triggered on a specific date associated with the record.

6. First, you'll setup the trigger or when you want the system to execute the workflow.
  - a. When the Franchisee signs the FDD Renewal.
  - b. When the Franchisees submits the FDD Renewal: This triggers the workflow when the Franchisee completes the FDD Renewal.
  - c. When first activity is logged: The workflow will be triggered when your Franchisee's records the first activity.
  - d. When following Campaign is sent to an Lead: The workflow will trigger after a certain campaign is sent to a Franchisee.
  - e. Whenever the Date for the FDD has expired: The workflow will trigger.

7. If you've selected an option in step 5 that requires you to choose a campaign or form from a list, make that selection now in the drop-down box provided.

**When a Location signs FDD**

- When a Location fills out the following web form
- When first activity is logged for a Location
- When following Campaign is sent to a Location
- Whenever a Call is logged for a Location
- Whenever an email is sent to a Location
- When Data Update Request is approved
- When Data Update Request is rejected
- When a Location is transferred
- When a Location is terminated
- When last contacted date is not updated for X days
- When a Location is not visited for following days since the last visit
- Whenever a visit is scheduled for a Location
- Whenever a visit is completed for a Location
- When a Customer Complaints is logged

8. Click **Next**.
9. You'll be prompted to create the condition for which Leads you want this trigger to apply.

All Leads: This workflow will apply to all Leads.

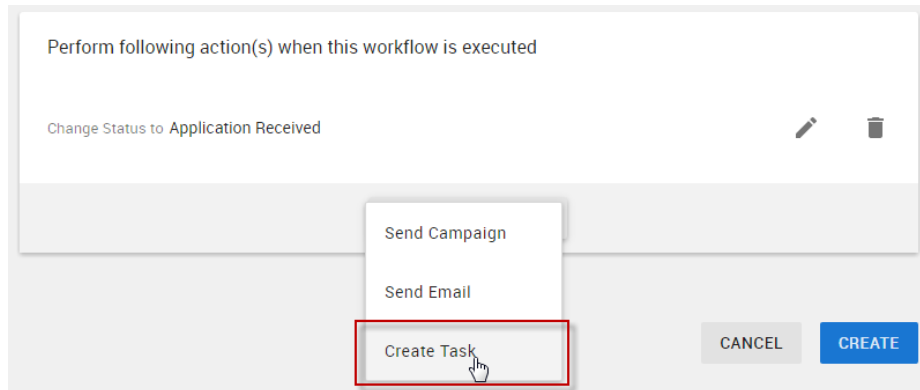
The screenshot shows a configuration window titled "CONDITION" with a sub-header "Which Locations do you want to execute this workflow on?". There are four radio button options: "All Corporate" (selected), "All Active", "All Active & Corporate", and "Locations matching below condition(s)". A blue "NEXT" button is located at the bottom right of the window.

Locations matching below condition(s): This workflow will apply to only those Locations who meet the criteria you set. If you select this option, you will be prompted to create the criteria.

10. Click **Next**.
11. Click **Choose Action**. More than one action can be completed for a single workflow.
  - a. Send Campaign: Sends a campaign to all Locations who meet the criteria.
  - b. Send Email: Allows you to send an email to someone inside your franchise organization.
  - c. Create Task: Allows you to send a task to someone inside your franchise organization. You will use this for the application example used above. Create a task



to go to the Lead owner when the application has been received requiring them to review the application.



12. Click **Create**.