

Springboard to Success

Activities Book – Keep It Clean and Fresh

Your decisions are only as good as your data, and things change fast in Franchising. You want to make sure that you have current contact information on your franchisees, and that any other important dates, franchise information and correspondence are up to date.

This book gives you the steps to:

- Identify information that's important to you, and where it is stored in FranConnect
- Add tabs and fields to store the information
- Identify where that information lives now – will you import it from another system, or ask your Franchisees to update it?

You'll use this information later in our series, when setting up scheduled reminders.

We invite you to use these instructions, to submit questions to 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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Identify information that's important to you

FranConnect's Information manager will allow you to track literally ANYTHING you want to for franchisees. That's an overwhelming thought, so if you don't already have a list of what's important to you, we recommend that you start with this "big 5" list.

Agreement Termination Date

Your agreement, whether 5, 7 or 10 years is the foundation of your relationship with your franchisee. While most Franchise Agreements require franchisees to submit a letter of intent to renew, they frequently forget. Without proper reporting protocols in place, franchisors can miss the renewal too with devastating impacts to revenue. Fran-Connect stores your "Term Expiration Date" under the Agreement tab in the franchise record so you never miss a Franchise Agreement renewal.

Lease Expiration Date

Like your Agreement Term Expiration Date, a lease expiring can have devastating impact on revenue. Imagine a highly profitable franchise location having to pick up and move locations. All the years of work establishing the brand on that street, in that city. FranConnect stores the "Lease Expiration Date" under the Real Estate tab in the franchise record so you never miss a lease renewal opportunity.

Owners

Your agreement, whether 5, 7 or 10 years is the foundation of your relationship with your franchisee. While most Franchise Agreements require franchisees to submit a letter of intent to renew, they frequently forget. Without proper reporting protocols in place, franchisors can miss the renewal too with devastating impacts to revenue. Fran-Connect stores your "Term Expiration Date" under the Agreement tab in the franchise record so you never miss a Franchise Agreement renewal.

Entity Information

The entity established by a franchisee protects them in the event of suit and their assets in the event their business fails. FranConnect has fields for "EIN" and "Entity Name" under the Entity tab in the franchise record.

All Communication

Support lawsuits do happen. Remember that in your FDD and FA you promise to support your franchisee by doing certain things. Your documentation of these things is your legal defense in the event a franchisee were to argue that you had not supported them as promised. Adopt the rule, "if it isn't in FranConnect, it didn't happen".

Identify where important information lives if outside FranConnect

We advocate that you keep all important information in one source, and FranConnect is capable of holding all important data about franchises. If that information is currently kept in another system, you may choose to import it into FranConnect, or to collect it from your franchisees via a web form that they fill out. We'll cover web forms in the session "Automating Data Refreshes". For now, let's talk about importing data into your Information Manager.

Using the Import Wizard

If you have a lot of updates to do, you may want to perform an import instead of manually updating them. To see the permitted fields for a given import format, choose that format from the drop-down selection menu, and choose **Download Data Sample** to get a sample file format, that you can match to your incoming data.

Info Mgr > Import

Welcome to the Import Data Wizard

Upload File

Select Tab : Customer Complaints ▼

Specify File Format : CSV (Comma Separated Values)
 Tab (Tab Separated Values)

*Franchisee Data File : Choose File No file chosen **Download Data Sample**

Continue

File Considerations: Files need to be in either Comma Separated Values (.csv) or Tab Separated Values (.txt) files. If any data contains comma, single-quote, double-quotes etc., the data value MUST be enclosed by double-quotes. If there is any double-quote in the data, replace it with two double-quotes. PRO TIP: use MS Excel to generate the CSV or Tab delimited file. The size of the uploaded file should not exceed 25 MB.

The first row of the CSV/Tab file MUST contain column names. There should not be any force line feed character in any of the data values. The only characters allowed in the amount fields are 0-9, comma, period, and hyphen (at the beginning for negative amounts only). Date Format allowed for all date fields is MM/DD/YYYY.

To Import Data:

1. Select the **Import** page
2. Select the file to import.
3. Choose the file format
 - CSV (Comma Separated Values): All data fields must be separated by a comma
 - Tab (Tab Separated Values): All data fields must be separated by a “tab()” character
4. Select **Choose File** to browse your computer for the CSV or Tab file.
5. Select the file
6. Click **Open**
7. Click **Continue**
8. Map the data in the file to the fields in FranConnect. For each field, choose the field from the drop down that matches or corresponds to the data fields listed. Click **Continue**. Confirm that the mappings are correct on the next page, and click **Continue**.
9. (For sales) In the Default Values for Fields section, Choose the **Inquiry Date**.
10. (For sales) Select the **Lead Owner** from the dropdown or the radio button for **Based on Assignment Rules** (see [Lead Owner])
11. Select the **Lead Status**
12. Identify and Select both the **Lead Source Category** and **Lead Source Details** (see [Lead Source])
Note: Default values will not be select if they are not provided from the CSV or Tab file.

Using the Export Data Wizard

It's often a good idea to inspect which fields are already completed before doing an import, or to see where information is missing for some locations. To facilitate this, you can build a custom report, or you can do an export.

There are four steps to exporting data from FranConnect – choose the Module (group of data) to select from, choose the search criteria to select a subset of records, select the fields to export for each record, and preview the data to be sure that it is correct before doing the export.



To export data:

1. Choose the Tabs that contain data that you need. You may select multiple tabs to export in this step. Click **Search Data** to continue.
2. Choose which records to export. Fill in data to match in the screen presented, to pull a sub-set of the data in the system. Note: the export limit is 5000 records, or up to 1% of the export data, so setting good search criteria is important.
3. From the buttons at the bottom of the record selection pane, you can go directly to export to get all available fields in the modules (**Export As...** buttons), or you can choose to select only some fields to export (**Select Fields** button). You may also choose to **View Data** to see if what you are exporting is what you intend.

Add places in FranConnect to store information

As you are importing data into FranConnect, or soliciting it in a web form, you may find that you have information that's specific to your franchise, which doesn't have a pre-designated field in FranConnect. If that's the case, you can add places for that information.

Manage Form Generator

The Form Generator can be used to customize the tabs and fields within Info Mgr to a business process that may not be standard in FranConnect.

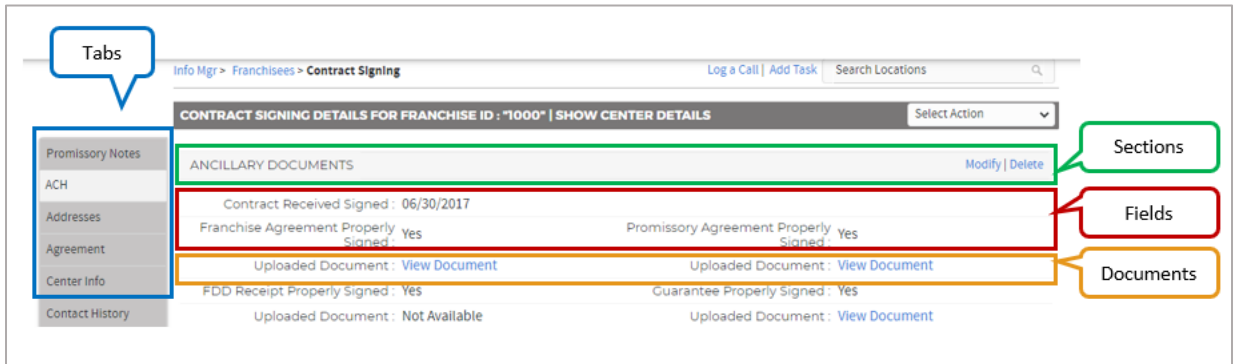
Each lead record has four elements:

- **Tabs** are the main topics under which the information may fall – for example, the personal profile of the main lead is one main group, while co-applicant information may be in another

tab. Several tabs are standard in FranConnect, but you may add special tabs that pertain to your business model, for example, existing licensing information for a personal services business. *Tabs that have information entered for any record cannot be deleted, and tabs that feed reports cannot be deactivated.*

- Inside the tabs, information is broken into **Sections** to make information easier to find. For example, personal profile data is broken into personal info such as address information, employment information, finance information, and other specialty data. You can add tabs for other groups of data that pertain to your business model.
- Within sections, information is stored in **Fields**. Examples of fields are Name, Address, City, etc.
- A special kind of field is the **Document** field. For some types of information, rather than simply typed text, it's necessary to append a document, such as a contract, or a copy of a business license, etc. You can choose to label the document field and upload the document without its own title, or have the option to name the document when it is attached to the record.

The illustration here shows where each element appears on a franchisee record.

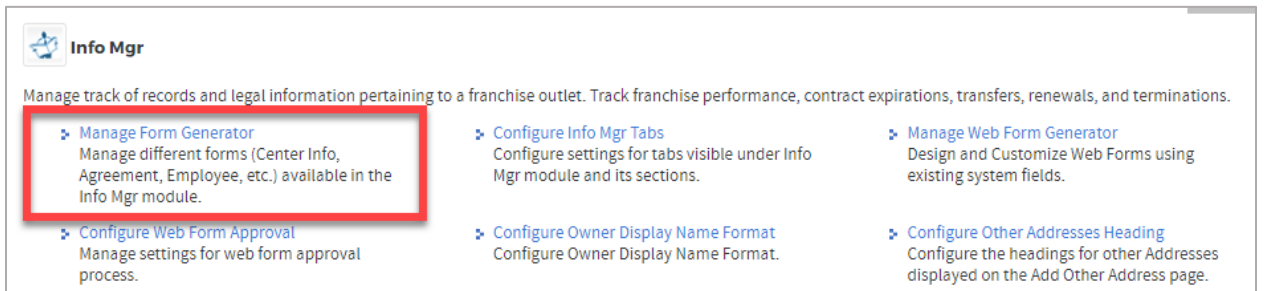


About Tabs

There are tabs that exist by default in the system; these tabs cannot be deleted or deactivated, but their names and order can be changed. In addition, you can make new tabs and position them wherever they make sense in your record. You can deactivate custom tabs at any time.

To change the name of a default tab

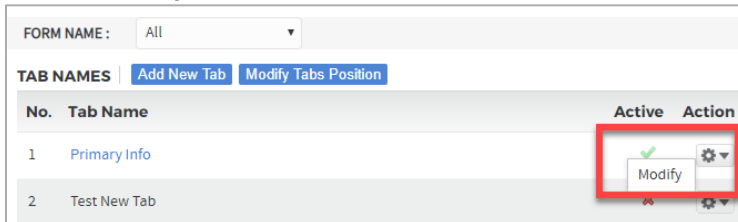
1. Navigate to the Admin interface, and then to the Info Mgr section. In the Info Mgr section, choose **Manage Form Generator**.



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 Info Mgr Tabs**
Configure settings for tabs visible under Info Mgr module and its sections.
- Manage Web Form Generator**
Design and Customize Web Forms using existing system fields.
- Configure Web Form Approval**
Manage settings for web form approval process.
- Configure Owner Display Name Format**
Configure Owner Display Name Format.
- Configure Other Addresses Heading**
Configure the headings for other Addresses displayed on the Add Other Address page.

2. For the tab name you wish to change, click on the action wheel to the right of the record. Choose **Modify**.



FORM NAME: All

TAB NAMES [Add New Tab](#) [Modify Tabs Position](#)

No.	Tab Name	Active	Action
1	Primary Info	<input checked="" type="checkbox"/>	Modify
2	Test New Tab	<input type="checkbox"/>	Modify

3. Type the desired name of the tab, being careful to avoid special characters. When complete, click **Save**.



Fields marked with * are mandatory. (X)

MODIFY TAB

Module : Info Mgr

*Display Name :

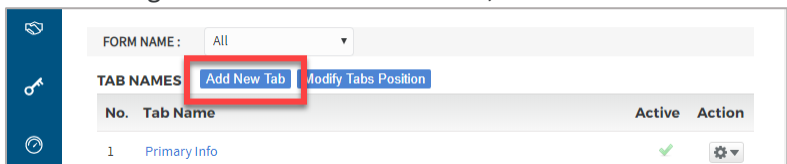
***Avoid using special characters like ! @ % # \$ ^ & * _ . ; < > |*

[Save](#) [Close](#)

- 4.

To add a custom tab

1. In the Manage Form Generator interface, click **Add New Tab**.



FORM NAME: All

TAB NAMES [Add New Tab](#) [Modify Tabs Position](#)

No.	Tab Name	Active	Action
1	Primary Info	<input checked="" type="checkbox"/>	Modify

2. Enter the information for the new tab, based on how you want the tab to behave.

Fields marked with * are mandatory.

ADD TAB

Module : Info Mgr

*Display Name :

*Sub Module Name :

Is Active : Yes No

Is Exportable and Searchable : Yes No

Accept multiple form inputs : Yes No

Do you want to make Tab accessible to all : Yes No

Can View :

Can Write :

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

Display Name: the name of the tab, as you wish it to appear in the list. Remember to avoid special characters in this field!

Sub Module Name: for a lead, will always be “Lead Management”.

Is Active: whether the field displays to users. To deactivate the tab, choose No.

Is Exportable and Searchable: If you want the results of this tab not to be discoverable in user searches, or exported to other systems, choose No.

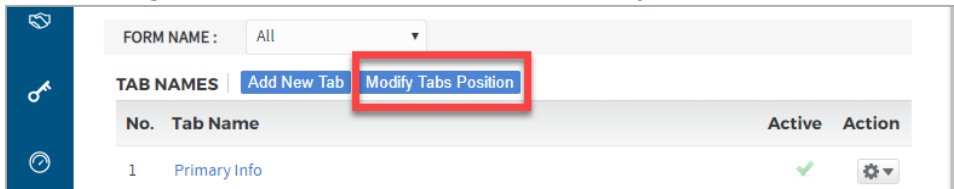
Accept multiple form inputs: if this tab will be available for synchronization to other modules, choose Yes. If this tab will only include lead information that will never be synched to location information, choose no.

Tab accessibility: most tabs are available for all people to view, but you may want to restrict some users from seeing some information, for example, extra financial information or personal history information that you collect. If this is the case, choose the roles who can view, and who can enter values for the custom tab.

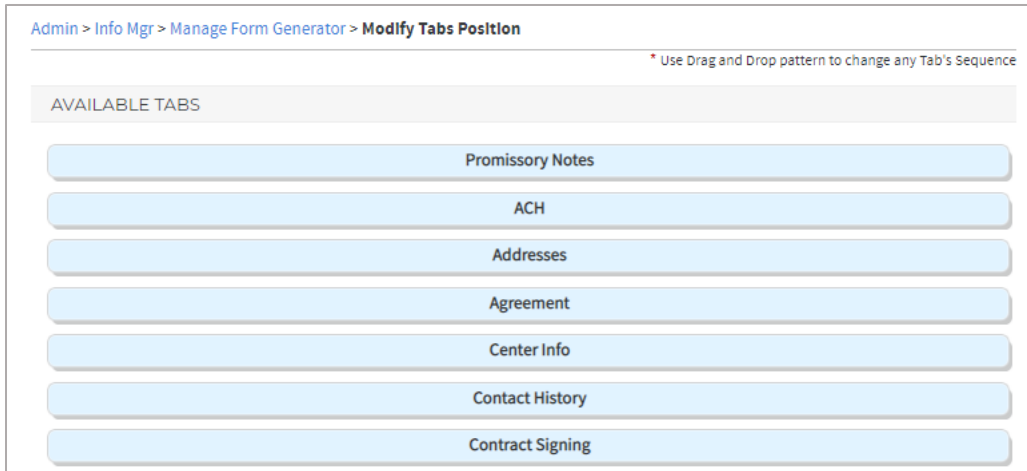
3. Choose **Save**.

To change the order of tabs in the display

1. In the Manage Form Generator interface, click **Modify Tabs Position**.



2. In the Available Tabs screen, all activated tabs are displayed. Drag and drop the Tabs to the desired display order.



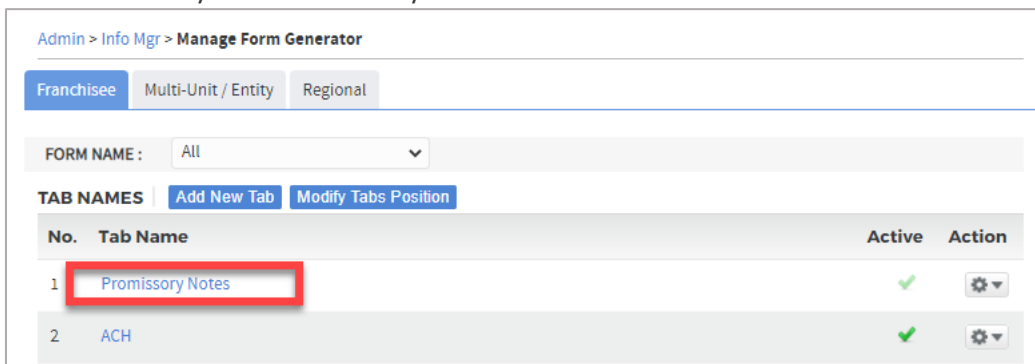
3. Click **Save** to maintain the changed order. To abandon changes, click **Back**.

About Sections

Inside the tabs, information is broken into Sections to make information easier to find. Each section contains a group of related fields. As with Tabs, Sections present in your default system cannot be deleted or deactivated. If a section contains no active fields, it won't be displayed to users.

To change the name of a section

1. Navigate to the Admin interface, and then to the Info Mgr section. In the Info Mgr section, choose **Manage Form Generator**.
2. Click on the tab you wish to modify.



3. In the Tab detail screen, each section is displayed, with its fields underneath the section name. Next to each section name, there are buttons for adding fields or documents within that section, or for modifying the section's name. Choose **Modify Section**.

FORM NAME : Primary Info

CONTACT INFORMATION | Add New Field | Modify Fields Position | Add Document | **Modify Section**

No. Field Name

4. Type the desired name of the tab, being careful to avoid special characters. When complete, click **Save**.

MODIFY SECTION

*Section Name : Contact Information

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

Save Close

To add a section

1. In the tab detail screen, click **Add Section**.

FORM NAME : Primary Info

CONTACT INFORMATION | Add New Field | Modify Fields Position | Add Document | Modify Section

PREVIEW FORM **Add Section** MODIFY SECTIONS POSITION

2. Enter the information for the new section, based on how you want the section to behave.

Fields marked with * are mandatory. (X)

ADD SECTION

*Section Name :

Section Type : Regular Tabular ⓘ

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

Add Close

Display Name: the name of the tab, as you wish it to appear in the list. Remember to avoid special characters in this field!

Section Type: Sections can be “regular”, meaning that the fields appear once per section, and only the most current information will be saved, for example, Next Renewal Date. Sections can also be “tabular”, meaning that past values for fields can also be stored, so multiple records of the same fields can accumulate in the section, for example, each past contract date with its expiration date. The illustration (taken from an Info Mgr lead record) below shows an example of a tabular section, with multiple entries for each field indicating multiple records, as indicated by the red and yellow boxes.

3. Choose **Save**.

To change the order of sections in the display

1. In the Manage Form Generator interface, click **Modify Sections Position**.

2. In the Available Sections screen, all activated tabs are displayed. Drag and drop the Sections to the desired display order.

4. Click **Save** to maintain the changed order. To abandon changes, click **Back**.

Fields marked with * are mandatory. (X)

ADD SECTION

*Section Name:

Section Type: Regular Tabular ⓘ

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

About Fields

Fields are the individual pieces of data about leads. You can add additional fields in any section. Some important things to know about fields are:

- Built-in or Fields present in the default system cannot be deleted.
- Custom Fields can be Added/Modified/Deleted/Deactivated.
- Field Display Labels can be modified (even for default built-in fields).
- Fields cannot be deleted if they have data, but their Display Label can be modified.
- Access to fields containing "PII" or Personally Identifiable Information requires a password.
- Even if a field is Active or Mandatory by default, its PII status or Display Label can be modified.

Document Management

- Built-in document fields cannot be deleted but their Field Display Labels can be modified.
- Custom document fields can be Added/Modified/Deleted.
- Documents can have subject associated for collecting additional information.

Each field has several attributes. These are explained in the "To Add a New Field" section of this document.

To add a new field

1. In the tab detail screen, navigate to the Section you would like the field to be in, and choose **Add New Field**.

FORM NAME: Primary Info ▼

CONTACT INFORMATION

No.	Field Name
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2. Enter appropriate values for the field, based on how you want it to behave.

Display Name: the name of the tab, as you wish it to appear in the list. Remember to avoid special characters in this field!

Is Exportable and Searchable: If you want the results of this tab not to be discoverable in user searches, or exported to other systems, choose No.

Field Type: indicates the type of data that will be stored in this field, and if desired, how it will be validated as in the right format. Available types are

Type	Description
Text	Up to 255 characters of letters and numbers. If desired, you can choose to validate this field as a 10-digit phone number, email address or URL.
Text Area	Up to 6 lines of 55 characters of letters and numbers.
Date	Select or enter a calendar date
Numeric	You can have three types of numeric fields: integer (simple number), currency (dollars), or percentage.
Drop Down	Lets you define a finite set of values that will appear as a drop-down menu for the field, from which users select one correct value. In addition, you can choose a pre-built country option, country and state, or values dependent on a parent field.
Multi-select Dropdown	Lets you define a finite set of values that will appear as a drop-down menu for the field, from which users select one or more correct values. In addition, you can choose a pre-built country option, country and state, or values dependent on a parent field.
Radio	Use this option to create a field of radio buttons from which a user can choose a single correct value. You can display the buttons horizontally or vertically.
Checkbox	Use this option to create a field of checkboxes from which a user can choose a one or more correct values. You can display the buttons horizontally or vertically.
Document	Defines a field that can have a file uploaded to it, representing a document.

Sync	Lets you fill this field with the value from a field in an Info Mgr or Information Manager record. This is useful for keeping information that's viewed in more than one place.
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About dependent values in fields

For certain types of fields (drop-down, radio button, checkbox, and multi-select drop-down, you can base the available fields on the values in a previous field. For example, if you ask whether a lead has certain categories of experience, such as business experience or restaurant experience, you may wish to follow up with a more detailed question, such as what type of business they have experience with, or what type of restaurant they have owned. The options are presented differently depending on the type.

A drop-down field will present only the appropriate options to the parent field's values, while a radio button or checkbox field will present all values but the non-relevant ones will be grayed out, as shown in the illustration below, showing an example where the parent field is "Do you have the following experience" and the dependent values for Business Ownership are retail and services, and the dependent values for Restaurant Ownership are QSR and casual dining.

To change the order of fields in the display

1. In the Manage Form Generator interface, click **Modify Fields Position**.

No.	Field Name	Display Type	Validation	Mandatory	Active	PII	Add to Center Info	Action
1	Category	Drop-down	--	✓	✓	--	✗	⚙️
2	Name	Text	None	✓	✓	--	✗	⚙️

2. In the Available Fields screen, all activated tabs are displayed. Drag and drop the Fields to the desired display order.

Admin > Info Mgr > Manage Form Generator > Promissory Notes > **Modify Fields Position**

* Use Drag and Drop pattern to change any Field's Sequence

ACTIVE FIELDS

Category	Name
Promissory Note Amount	Term Based
Time Frame(in months)	Annual Interest Rate
Payment Plan Amount	Payment Plan Start Date
Monthly Payment Amount	Amount Invoiced
Amount Paid	Balance Amount
Status	Promissory Note Prepared
Promissory Note Dated	Plan Final Payment Dated
Promissory Final Payment Dated	

DE-ACTIVE FIELDS

No records found.

[Save](#) [Preview](#) [Back](#)

5. Click **Save** to maintain the changed order. To abandon changes, click **Back**.