Springboard to Success

Activities Book – Logging Activity in FranConnect

In order to keep leads moving through the pipeline, and allow the whole team to see the history of a lead and the associated deals, you need to adopt the attitude that "if it's not in FranConnect, it didn't happen" and log EVERYTHING.

Fortunately this is easy with the many ways that FranConnect lets you communicate directly from inside the Sales module, and incorporate the tools you use every day, such as your mail app and your phone, to seamlessly keep track of the effort that you're putting in to close that partnership!

Contents

Managing Leads in FranConnect

Sending Email to a Lead

Email messages are often an essential tool in the dialog between a lead and members of the sales team. The email editor can be used to write ad-hoc as well as template based messages.

There are three places from which to send an email:

Select **Send Email** from the Lead record.

Select **Send Email** from the action wheel on the Lead Management page.

If sending an email to multiple leads,

       a) Select the leads from the Lead Management page.

       b) Click the green action button.

       c) Click **Send Email.**

To send email to a lead from FranConnect:

1. Select **Send Email** from one of the locations listed above.
2. Choose a From/Reply option:
1. Logged User ID: Your user ID.
2. Lead Owner ID: The Sales person responsible for the lead.
3. Custom: Enter in an email address for the recipient.
4. If you want to use a template you've already created, choose the template from the **Email Template** dropdown.
5. The **To** field will populate with the lead name.
6. If relevant, enter an additional contact in the CC field. Additional contacts can be searched and added using **AddressBook.**
7. Input a **Subject.**
8. To send this email to the Co-Applicant as well, Select the check box to **Send Email to Co-Applicants.**
9. To add your signature, Click **Add Signature** (see [Creating a Signature).
10. Input your text into the Email editor.
11. Click **Send.**

Logging a Task for a Lead

The task form for Franchise Sales provides options for logging and assigning a task to various members of your franchise sales team.

Tasks added appear in the following locations:

- In the Contact History section on the Primary Info tab in the Lead record
- On the Calendar page of the assignee
- On the Tasks page

There are four places from which to Log a Task:

Select **Log a Task** from the Lead record.

Select **Log a Task** from the action wheel on the Lead Management page.

From the dialog box resulting in the completion of logging a call.

If logging a call for multiple leads,

1. Select the leads from the Lead Management page.
2. Click the green actions button.
3. Click **Log a Task.**

To Log a Task:

1. From the Primary Info tab of the lead recors (Contact History section), the calendar page of the task assignee, or the Tasks page: select **Log a Task**.

2. Select one of the following options in the **Assign To** field to assign the task:

   Lead Owner: The sales person responsible for the lead.

   Other User: Assign the task to another user of the FranConnect system. The schedule for this user can be viewed in the table at the bottom of the page.

3. Select a **Status** from the drop-down.

4. Select a **Task Type** from the drop-down.

5. Input a **Subject.**

6. Select the checkbox for **Timeless task** to place the task in the task list without a scheduled date or time.

7. Choose a **Priority** from the dropdown.

8. Input a **Start Date.**

9. Click the checkbox for **Add to Calendar** if you want the task to show on the Calendar page (if you want this task to appear on your Outlook Calendar, see [Using Outlook Integrations).

10. Select the **Start Time** and **End Time**.

11. Input **Comments**.

12. Select a reminder option from **Set Reminder.**

   - No Reminder: No system reminder will pop-up.
   - 15 Minutes Prior: A pop-up will appear 15 minutes prior to the **Start Time**.
   - Set Time Yourself: A pop-up will appear at the time you set.

13. Click the checkbox for **Task Email Reminder** to send an email to yourself at the time selected in item #12.

14. If you choose to set the time yourself, you will be required to fill in the **Reminder Date** and **Reminder Time**.

15. Click **Create**

16. Click **Create and Create Another** to add more tasks.

Logging a Call to a Lead

There are three places from which to Log a Call:

- Select **Log a Call** from the Lead record.

- Select **Log a Call** from the action wheel on the Lead Management page.

- If logging a call for multiple leads,

  a. Select the leads from the Lead Management page.
  b. Click the green action button.
  c. Click **Log a Call.**

To Log a Call:

1. Select **Log a Call** from one of the locations listed above.
2. Input the call **Subject.**
3. The date and time will pre-populate with the present date and time (to the most recent quarter hour).
4. Select a **Call Status** from the drop-down.
5. Select a **Communication Type** from the drop-down.
6. Enter text in the **Comment** box.
7. Click **Add.** A dialog box will appear asking you to confirm scheduling a task.
8. Click **Yes** to **Log a Task.** Click **No** to return to the origination page.

Adding Remarks to a Lead Record

The Remarks form is useful for logging information or actions that don't fit the Call or Task format. Remarks are date and author stamped when submitted. Remarks are displayed in the Activity History section of the lead record.

To Add a Remark

1. Select **Add Remarks** from the top navigation bar of the lead record, or the action wheel for the record on the Lead Management page.
2. Input notes into the text box.
3. Click **Submit.**

Adding Sales Tasks

You can associate a Task with a Lead by following the steps mentioned below:

1. Select **Tasks** from the **Sales** module.
2. Click **Add Task.**
3. The following **Associate Lead with Task** screen appears:

Copying FranConnect on email communications

Using a feature called Email Capture, you can include FranConnect on emails that you send to your leads, by cc:ing or bccing a designated FranConnect email address. You need to configure that address, then make sure that members of the sales staff who will use it know what the email ID is.
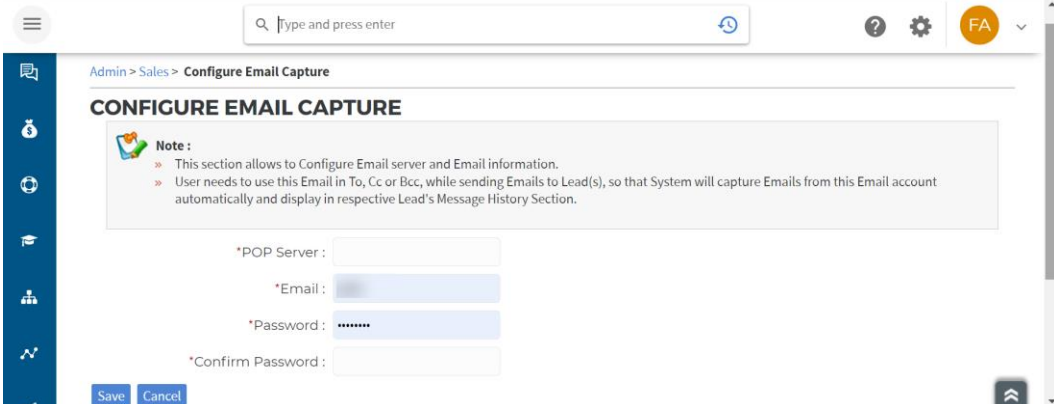
For any email with the FranConnect email in the cc or bcc line, the email will be attached to any leads in FranConnect, based on matching email addresses. If any email ID does not match with the email ID of any record in FranConnect then that email will not get uploaded. The uploaded email will be available under the Message History of the record.

This is a 60-minute period-based activity, so the email should appear in the history record within an hour of the email being sent.

Configuring Email Capture

To configure the Email Capture in FranConnect Sky:

1. Navigate to **Admin > Sales > Configure Email Capture**
2. Enter the POP server information, and create an email alias that will be used to receive emails, as well as a password for that alias. A typical email address would be yourcompany@franconnect.com.

Once the configuration is done, the integration is ready to use. Distribute the email address for your staff to use when emailing leads.
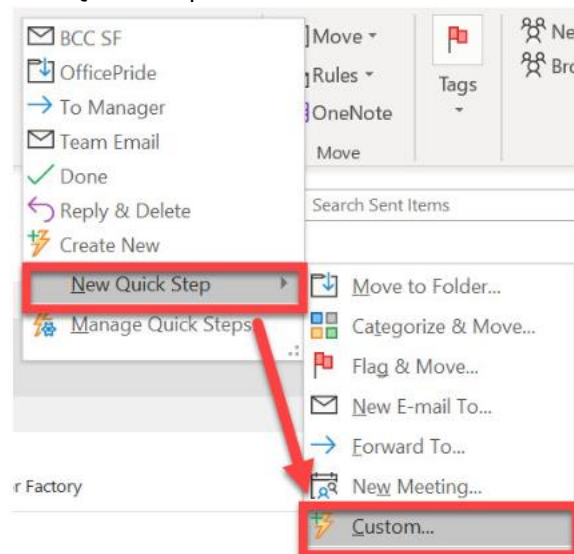
If you'd like to have an easy way to copy FranConnect without having to remember the email address each time, see "setting up a template" for the email system you use.
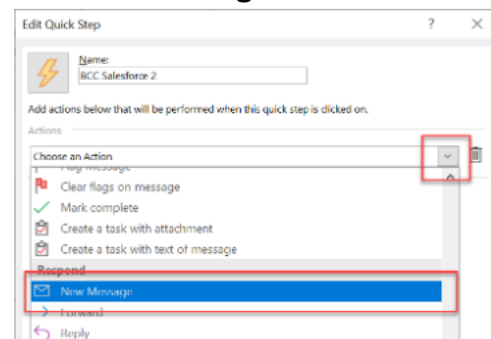
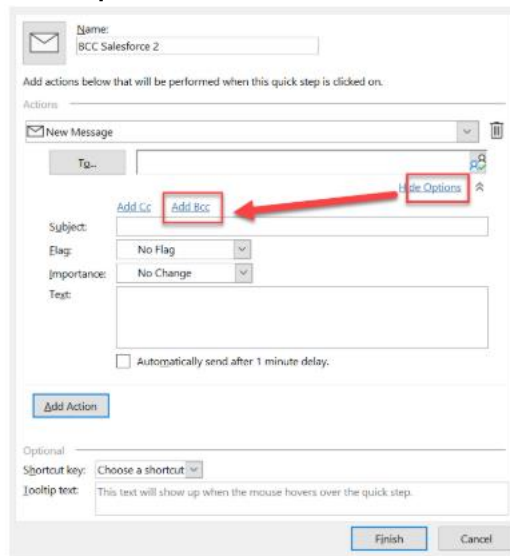1. In the Outlook **Home** toolbar, in the **QuickSteps** section, find the QuickSteps dialog box.
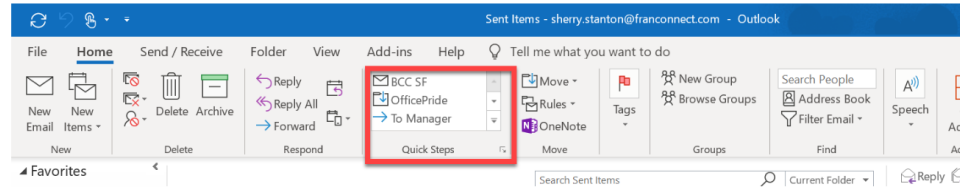
2. Choose the drop-down arrow at the bottom right of this dialog, and choose New Quick Step > Custom.

3. Name your Quickstep - for example "BCC FranConnect", and choose the action **New message**.

4. A dialog will open with a field for who this email is to be sent to. Choose to **Show Options**, and choose **Add BCC**.

5. Paste in the FranConnect BCC address, and if you like, choose to assign a shortcut key. Put a brief description of what this Quickstep does in the text, such as "sends a blind copy to FranConnect". Press **Finish**.

6. Now the Quicksteps section of your Home Ribbon in Outlook will include the option to send a mail with BCC to FranConnect. Click on the Quickstep, or use your shortcut key combination to open an email with the FranConnect BCC already included.

Setting up a Template to automatically BCC FranConnect from Gmail
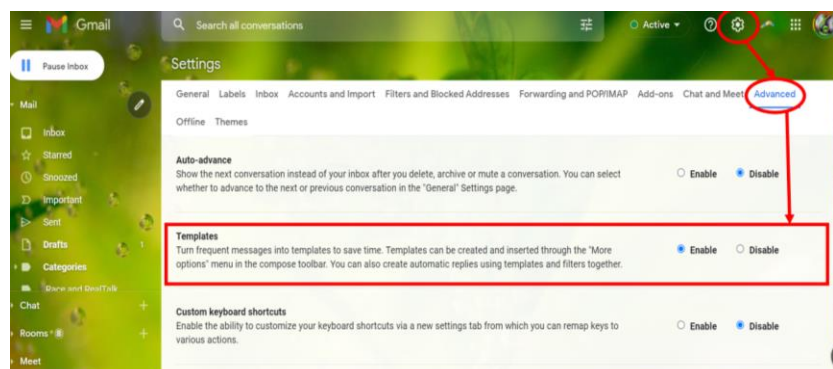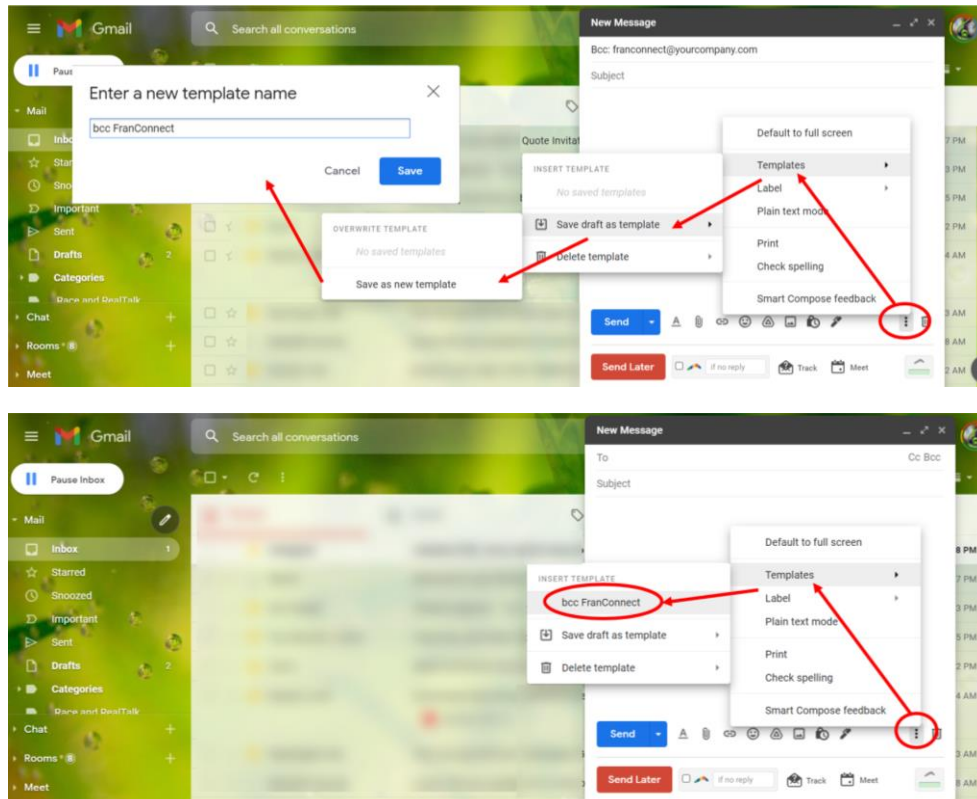
Gmail Integration

Enabling the Gmail Integration App

To download the Gmail Integration App, log into FranConnect, and from your user ID at the upper right drop-down of the screen, and choose Options. In the Options page, choose the **Download Apps** tab.
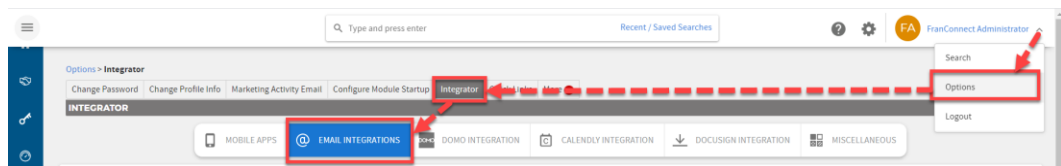
Navigate to the Gmail App. Click on the button that says, "available in the chrome web store" to download the app.
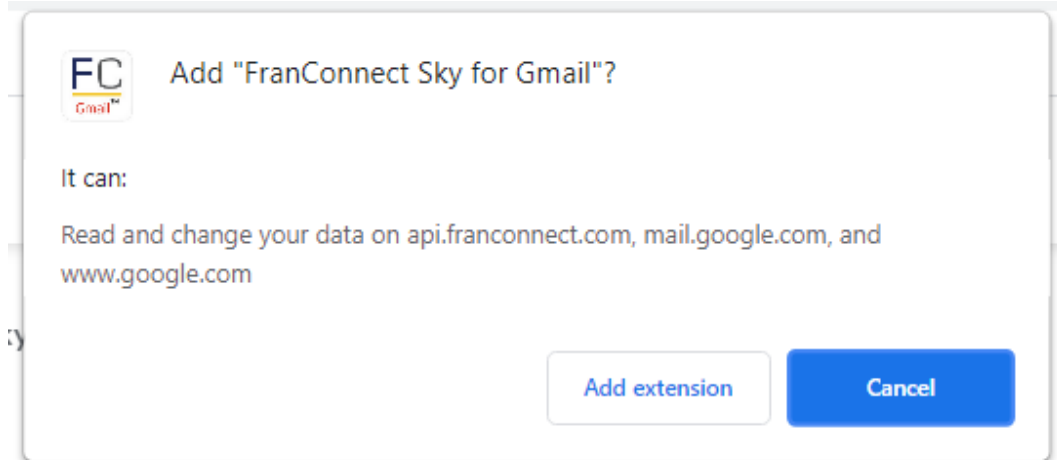
Note: Make a note of the Company Code (highlighted in red below), which is one element you'll need to sign into the FranConnect Gmail plugin.
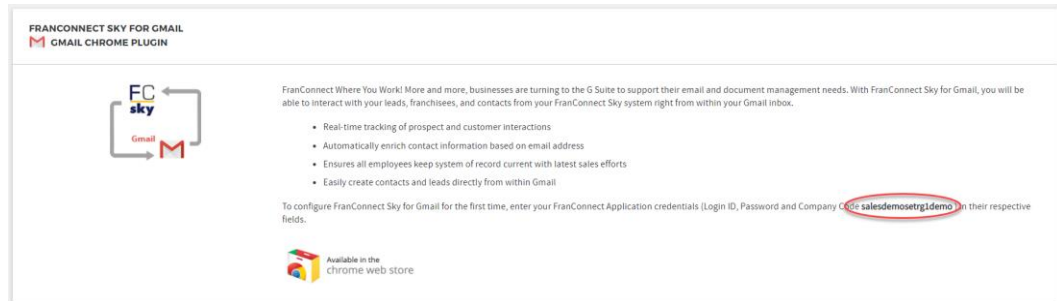
In the chrome web store, find FranConnect for GMAIL and choose the **Add to Chrome** button.
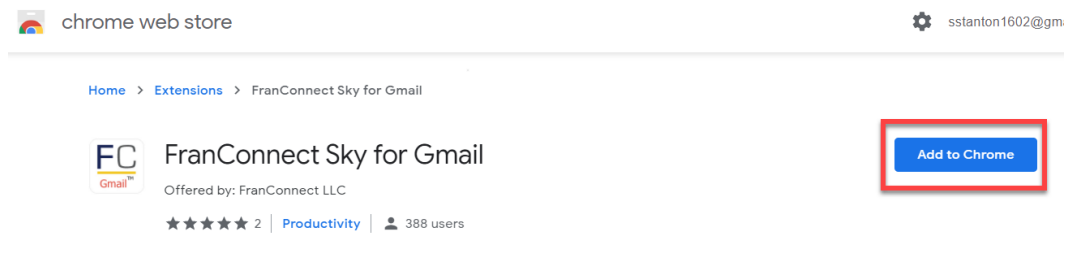
Choose to "Add extension" from the resulting dialog.

Once the App is downloaded, a confirmation message will be displayed.
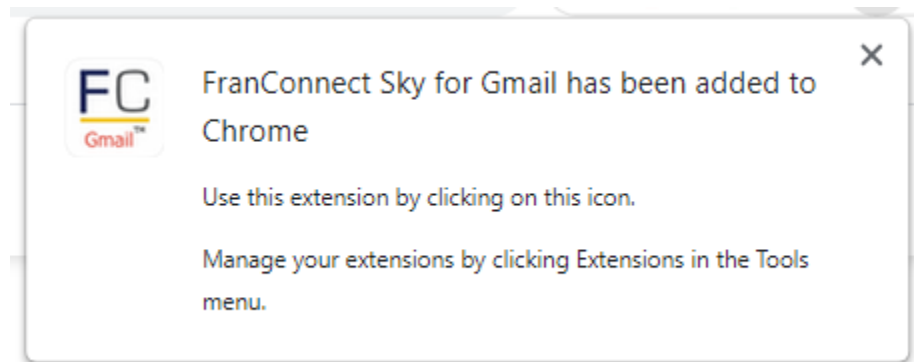
Log into Gmail. To the right, there will be a panel for FranConnect. Enter your FranConnect user name, password, and **Company Code** from the Download Apps screen.
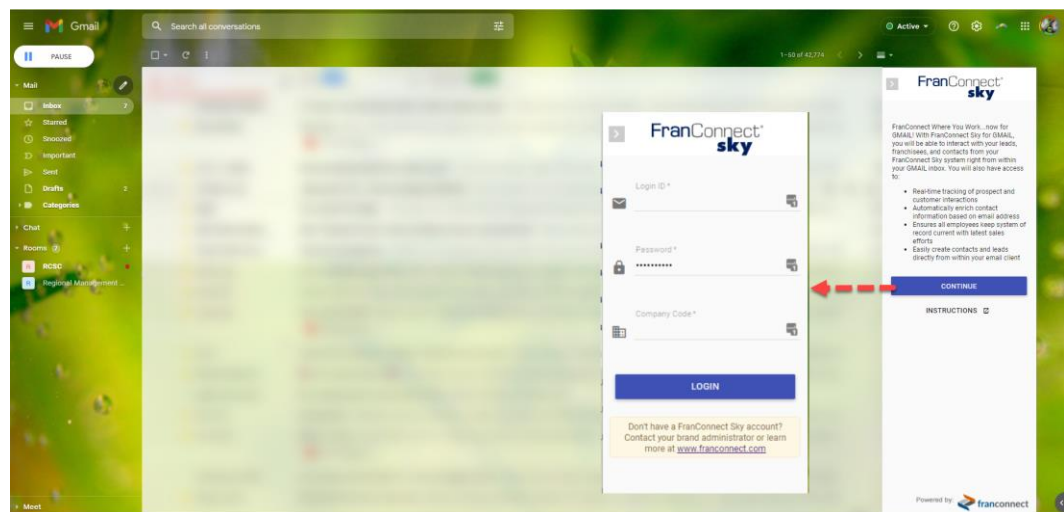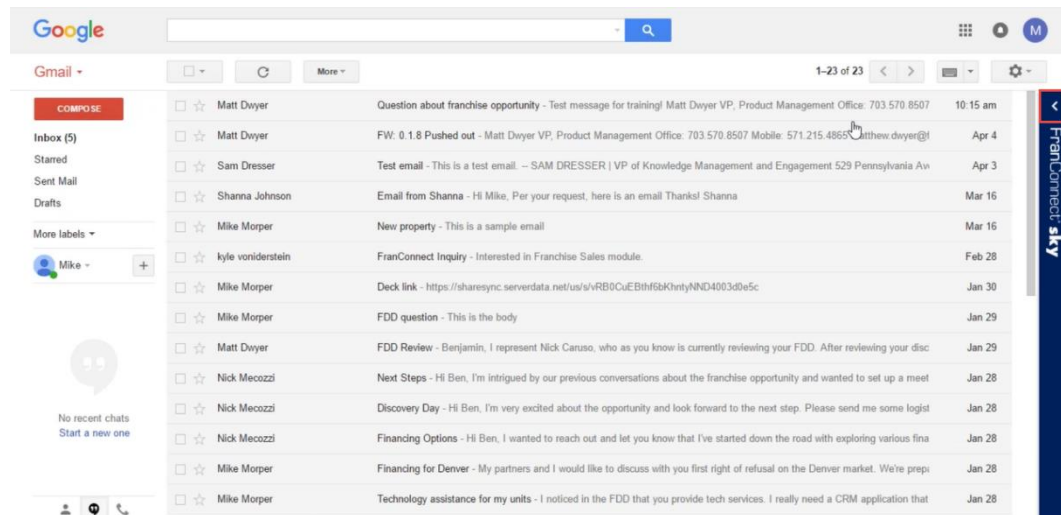
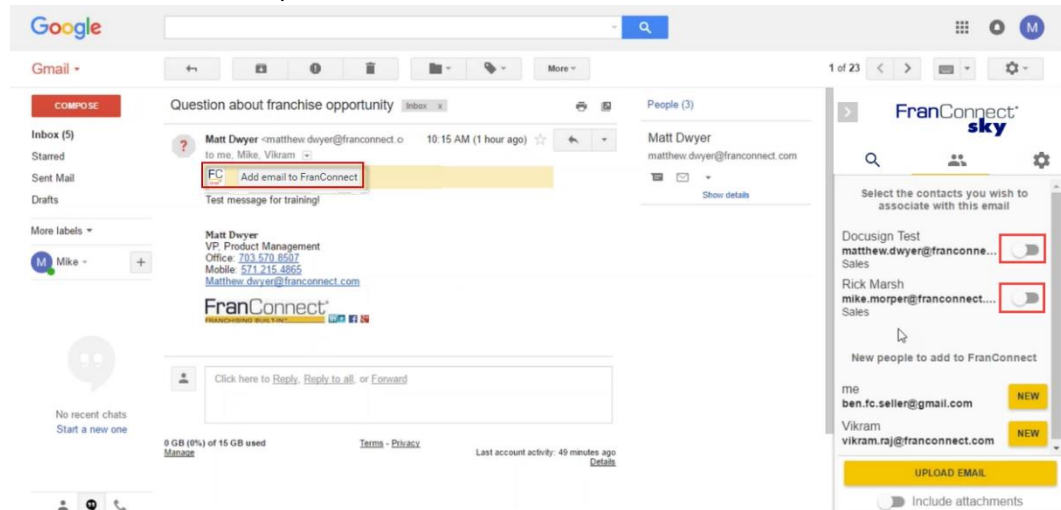## Using Gmail with the FranConnect plug-in

While running the FranConnect Gmail app, when you highlight an email address, the App will suggest records in FranConnect that match the email address. It will also suggest related contacts based on the domain name in your email. These records may come from the Sales, Info Mgr, or CRM modules.
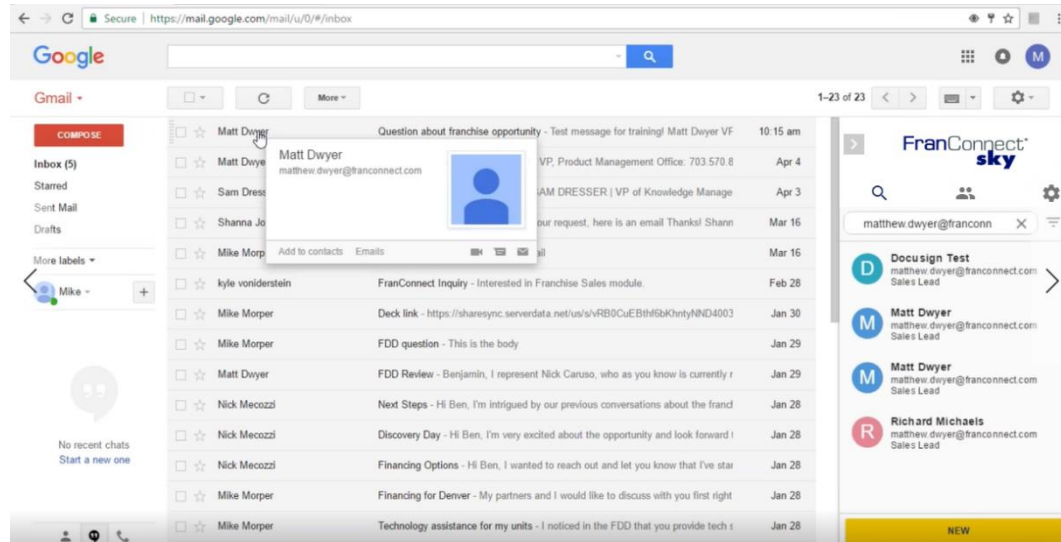
Note: To regain screen space while running the app, click the right arrow next to your company's logo, and the app will minimize to the right of the screen. Click the left arrow on the same stripe to maximize the app again.

Click on an email to open it. Part of the email is a button to add the email to a FranConnect contact. Select the contacts in the FranConnect panel by clicking on the slider panels next to their names, and adding any additional names and selecting them with their slider panels.


Then click the Add email to FranConnect.

Note: The first time you add records to FranConnect from this app, you'll be prompted to give FranConnect permission to access Gmail records. Press Allow to give FranConnect permission to Gmail messages.
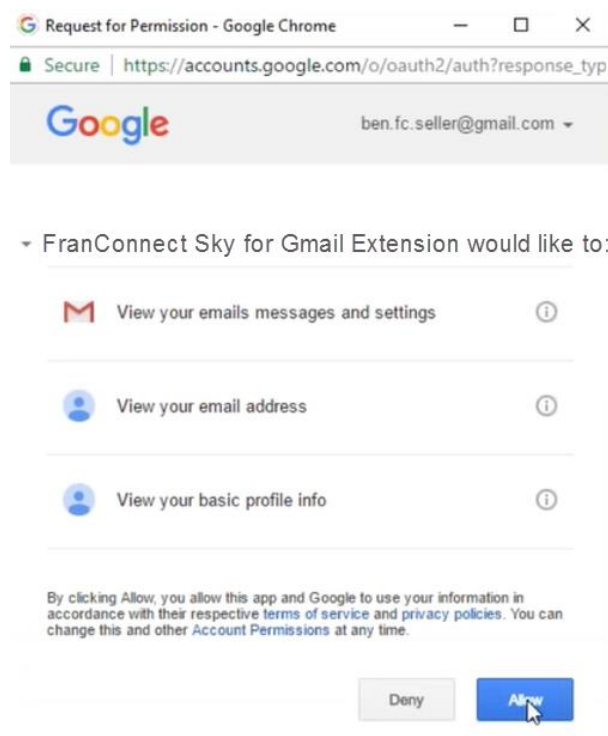
Locating a FranConnect contact from a Gmail message address

While running the FranConnect Gmail app, when you highlight an email address, the App will suggest records in FranConnect that match the email address. It will also suggest related contacts based on the domain name in your email. These records may come from the Sales, Info Mgr, or CRM modules.
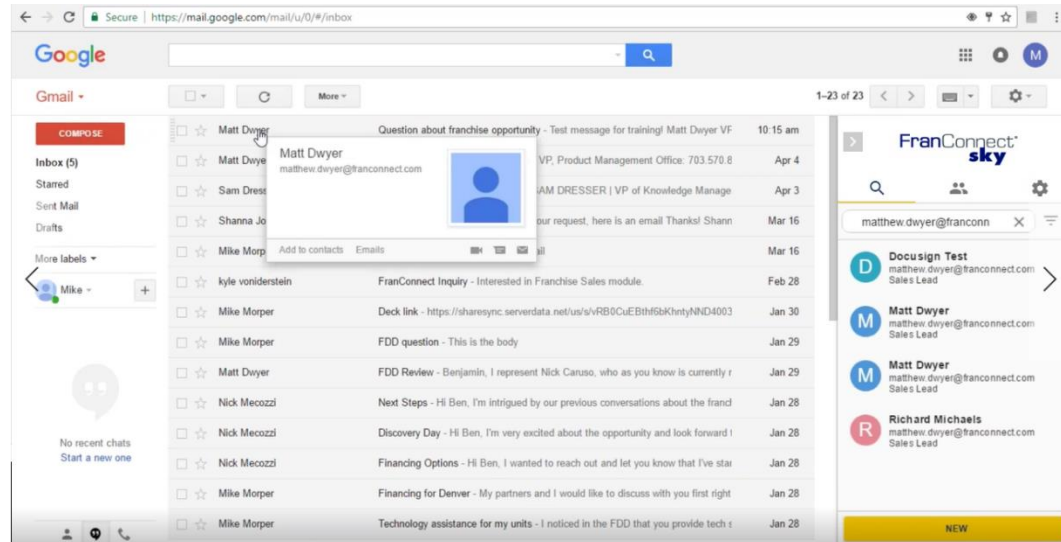
You may choose to associate this email with an existing contact record that has no email relationship to the email address in the record. To search for that record, type the email address of the FranConnect contact in the search field and click the magnifying class icon to search for the record.

Adding a FranConnect contact from a Gmail message address

If there are email addresses on the thread that do not have matching email addresses in FranConnect (but are from the same domain), those email addresses will be listed at the bottom of the list of possible FranConnect records to associate with the email. You can choose the New button next to any of them to add a record to Sales, Info Mgr or CRM.

Click **New** next to a listed name, or **New** from the button at the bottom of the list. You'll be prompted to choose which data set to add the contact to – Sales or CRM lead, or Info manager or CRM contact. Then you'll fill out any information remaining, e.g. the Source information for a lead, and click **Save**.

Saving an email to a FranConnect contact

Click on an email to open it. Part of the email is a button to add the email to a FranConnect contact. Select the contacts in the FranConnect panel by clicking on the slider panels next to their names, and adding any additional names and selecting them with their slider panels.
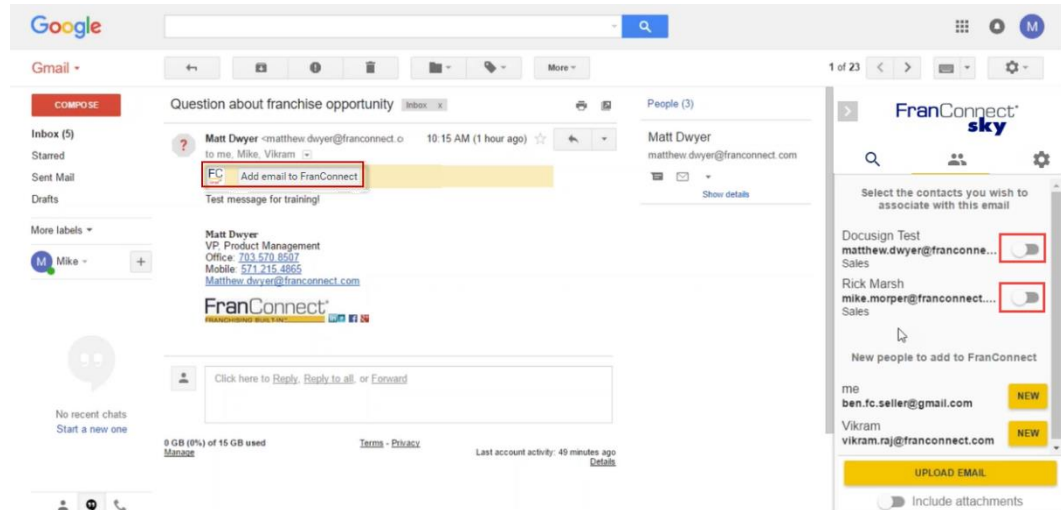
Then click the **Add email to FranConnect** in the message, or**Upload Email** in the FranConnect app panel.

Outlook System Integration

For System Administrators that are supporting organizations using Exchange Server 2013 or Exchange Server 2016, please refer to the following MicroSoft TechNet notices about deploying Outlook add-ins

Installing and removing Outlook add-ins

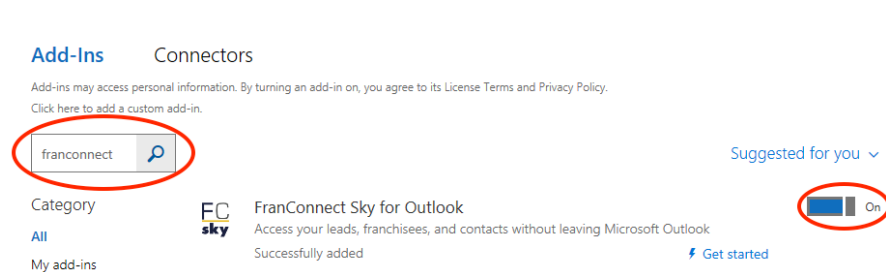Managing Outlook add-in user access

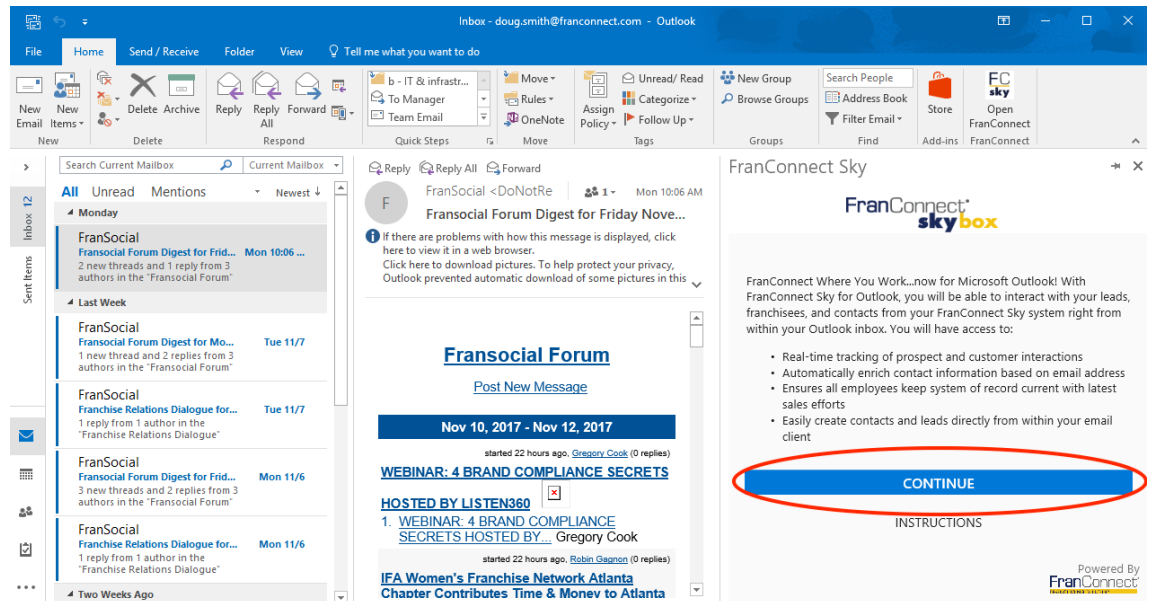## Accessing & Configuring the Outlook Add-in – for Windows

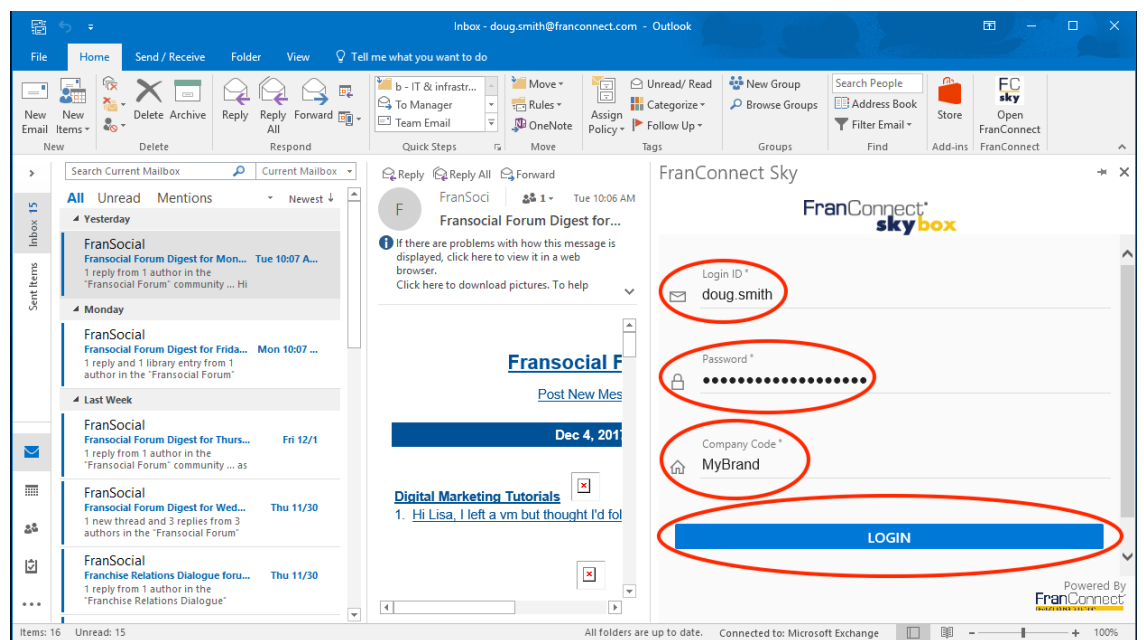Select the "Store" icon (If "Store" does not appear, enable "Show Tabs and Commands").
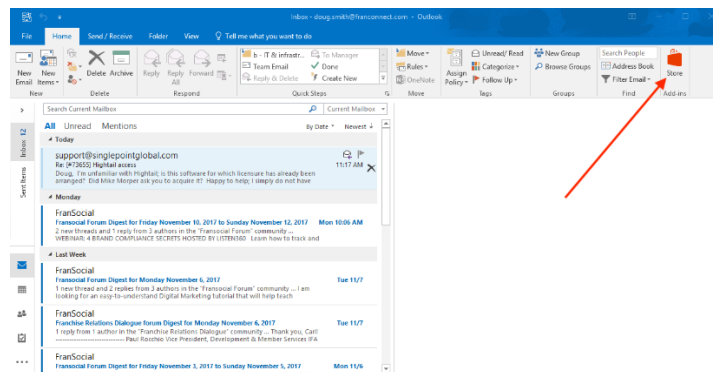
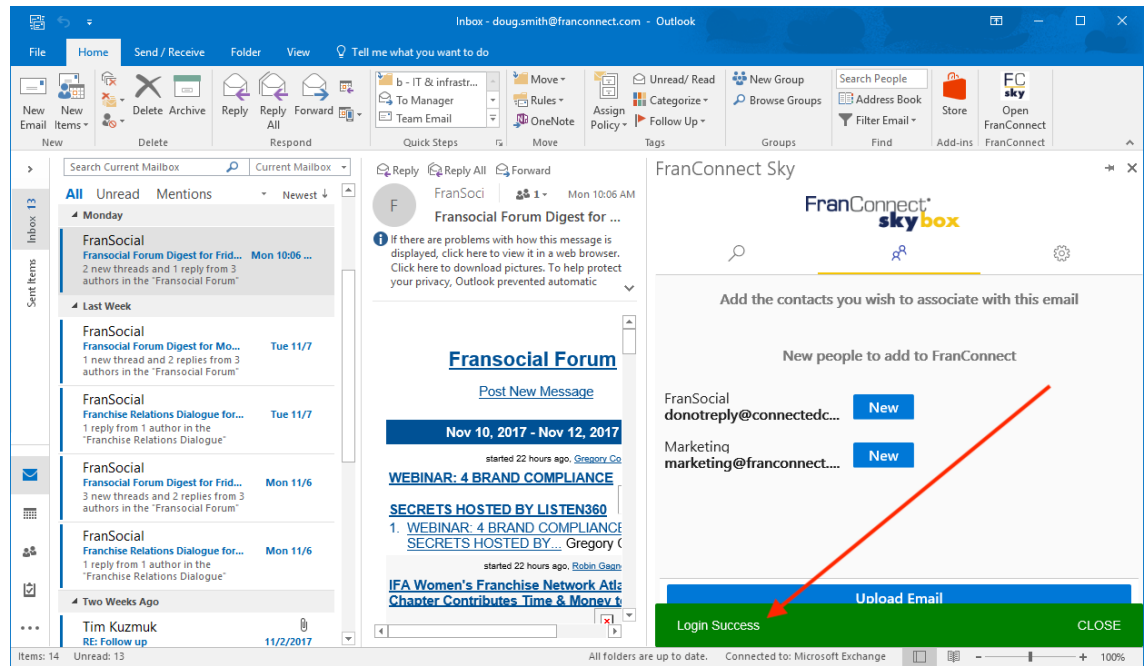Search on "franconnect" to find and enable the add-in.

Select "Continue" to enable the add-in.

Fill in Login ID, password, and company code fields and then select "Login" (For details on how to find your company code, please refer to the note in Help Center.)
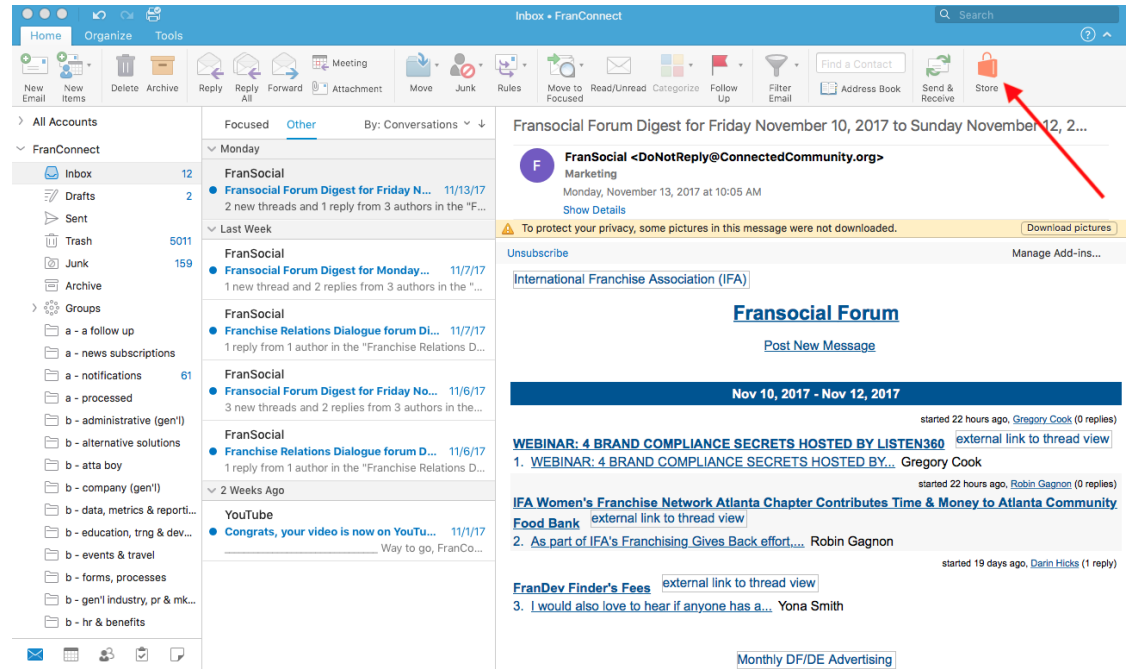
A temporary green "Login Success" banner will appear and you can now begin using the FranConnect Sky for Microsoft Outlook add-in.
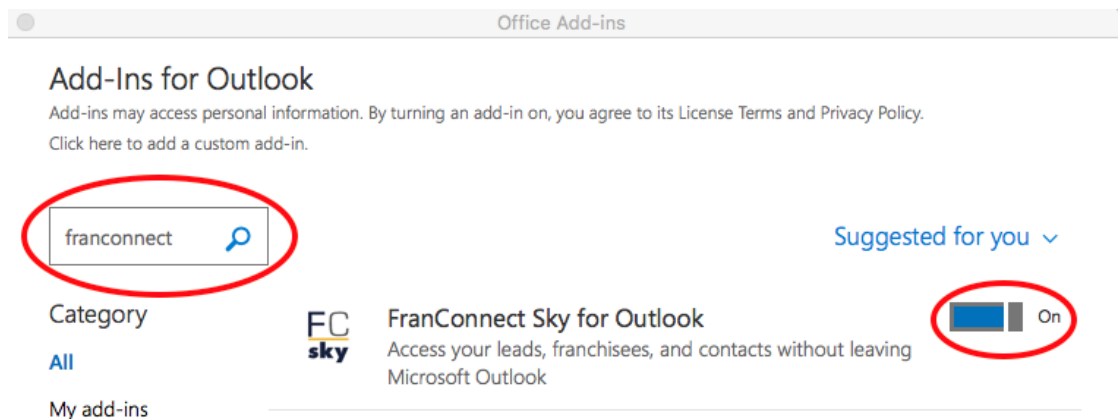
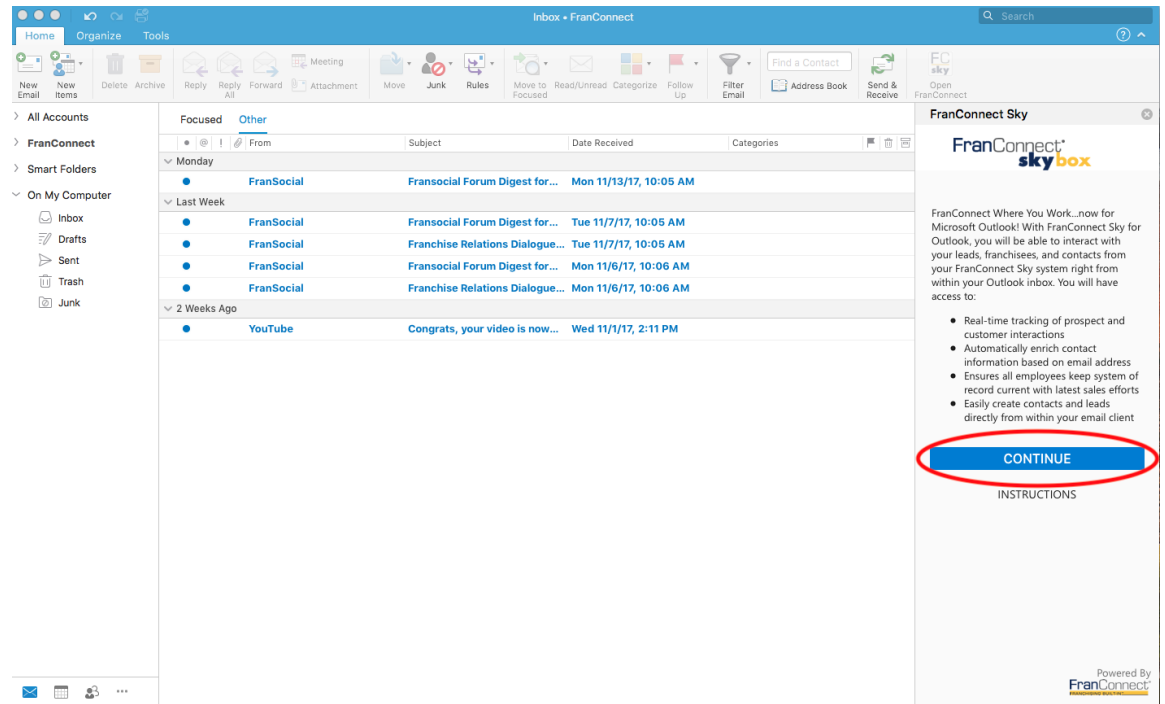## Accessing & Configuring the Outlook Add-in – for Mac

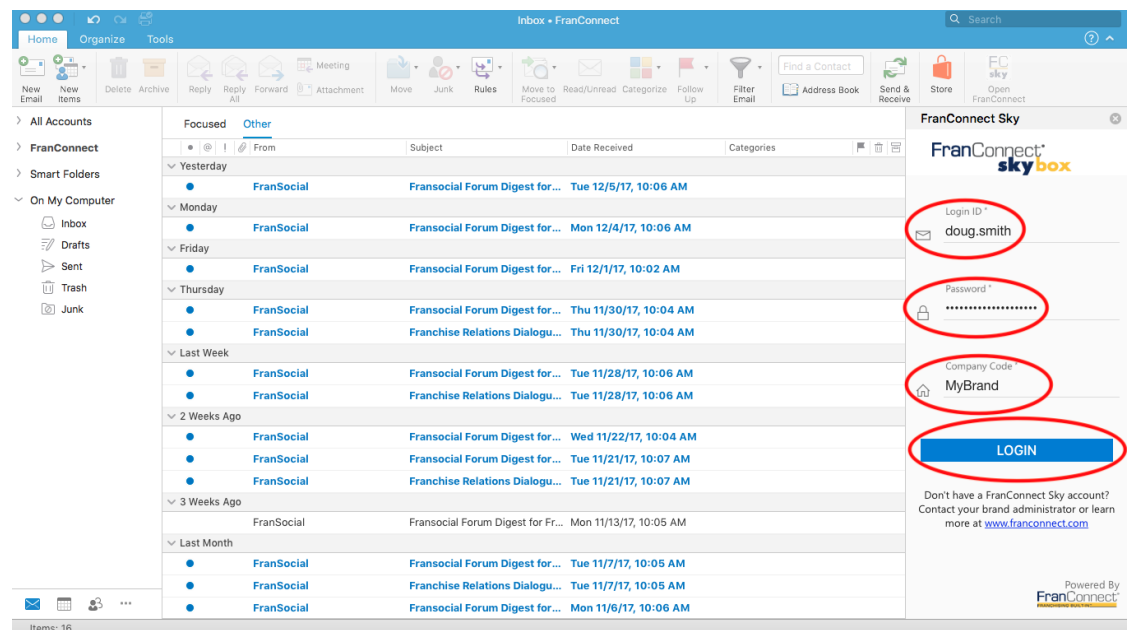Select the "Store" icon (If "Store" does not appear, select View > Ribbon)

Search on "franconnect" to find and enable the add-in

Select "Continue" to enable the add-in.

Fill in Login ID, password, and company code fields and then select "Login" (For details on how to find your company code, please refer to the note in Help Center.)

A temporary green "Login Success" banner will appear and you can now begin using the FranConnect Sky for Microsoft Outlook add-in.
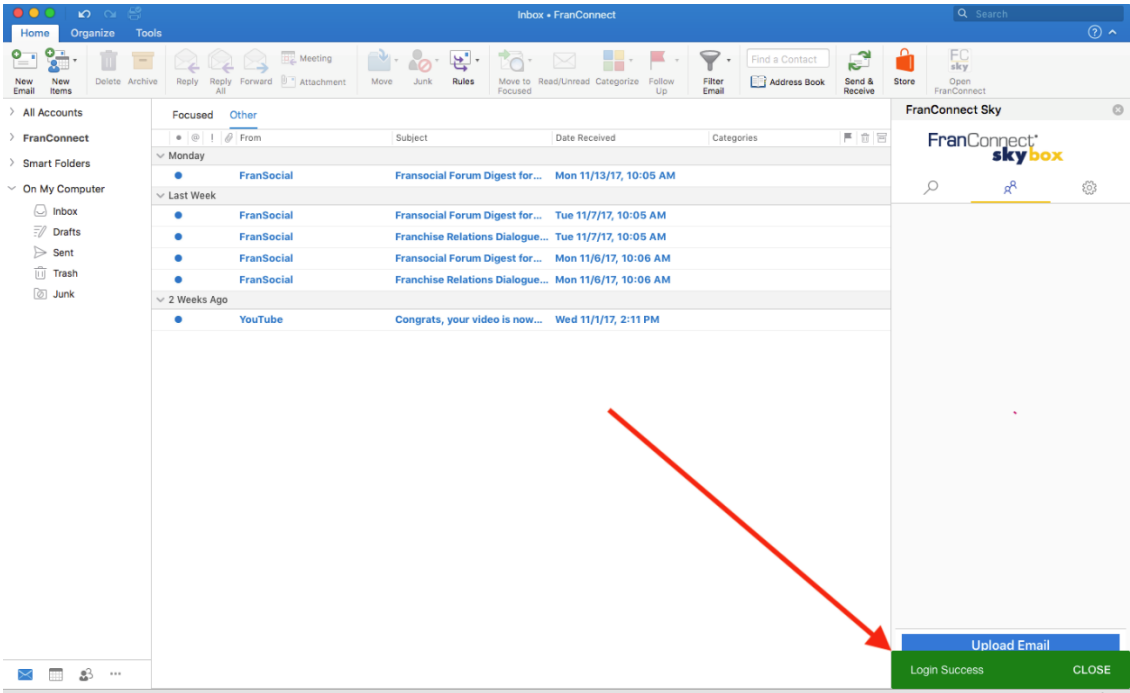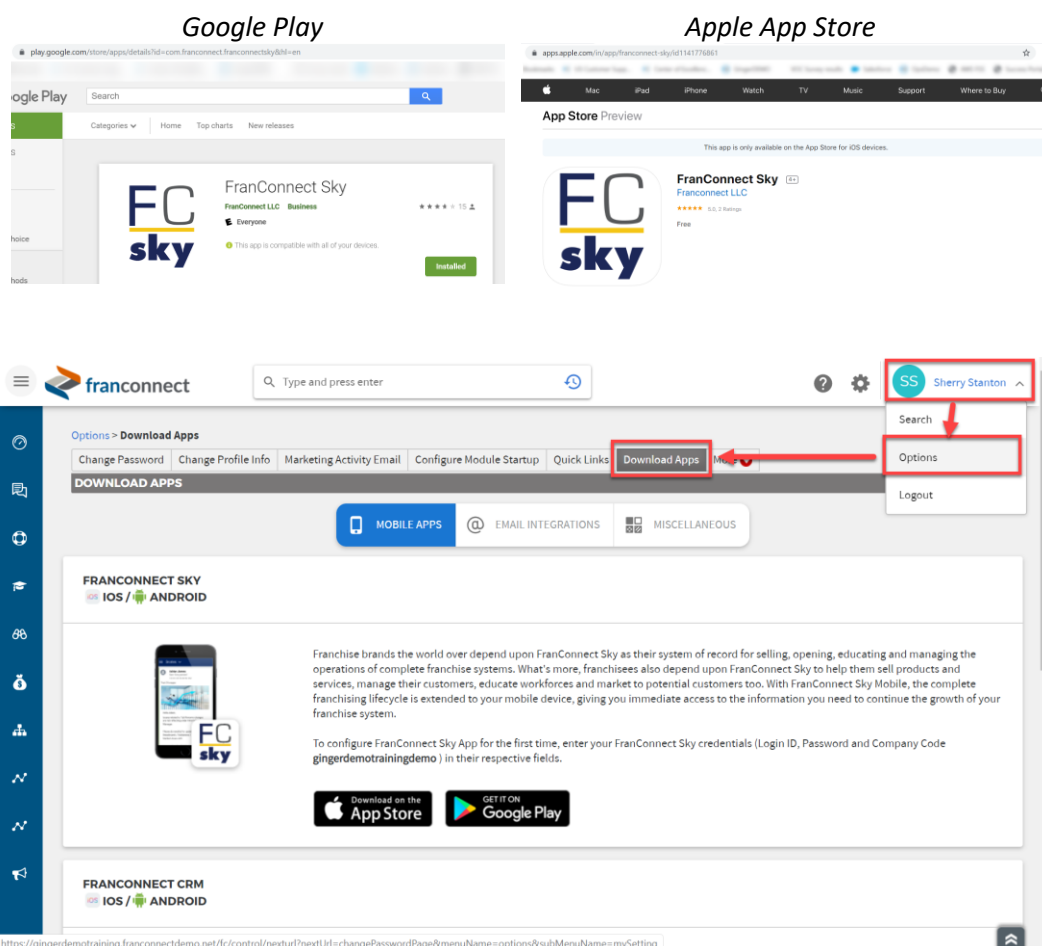
About FranConnect Mobile Apps

Mobile apps allow you to bring the power of FranConnect wherever you go. You can log calls to sales leads, check on lead progress, mark opener checklist items complete, access documents, take training and more.

Getting FranConnect Sky Mobile App

The FranConnect mobile app can be downloaded on your cell phone or tablet. Users can upload the visits to the server from their device when they come online.

To download and configure FranConnect Sky App for the first time, navigate to your designated App Store (Android or Apple), download the FC Field Ops App.

*Google Play*   *Apple App Store*

Logging In to the FranConnect Sky Mobile App

Log in to FranConnect to find your Company Code, a necessary part of your login. To find your company code, go to your login ID, choose **Options** from the drop-down menu, and choose **Download Apps.** The resulting screen will display your company code (highlighted in the screen shot that follows).
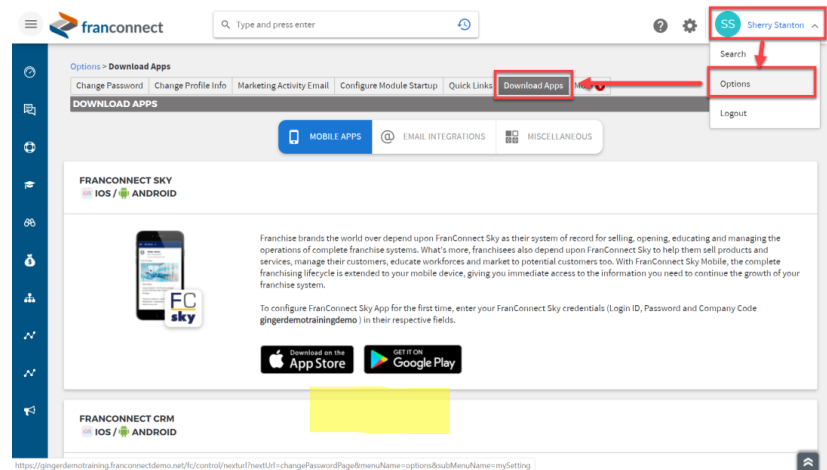

Open the FranConnect Sky app, and enter your company code, and press Continue. Use your regular FranConnect login ID to login on the screen that follows If your phone has the option for fingerprint login, you can set this up on your phone as well, at any time, by following the prompts on your phone.
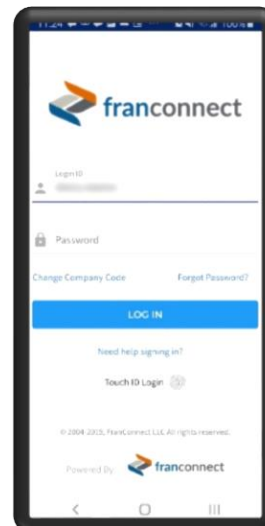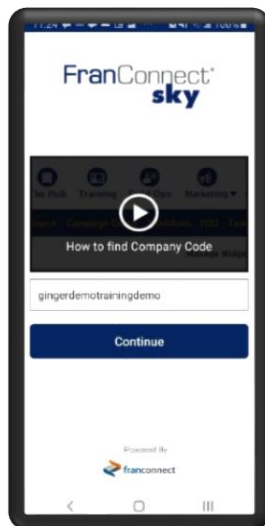
On following occasions when you open the application, you'll be able to log in with your touch ID or with your FranConnect login ID.
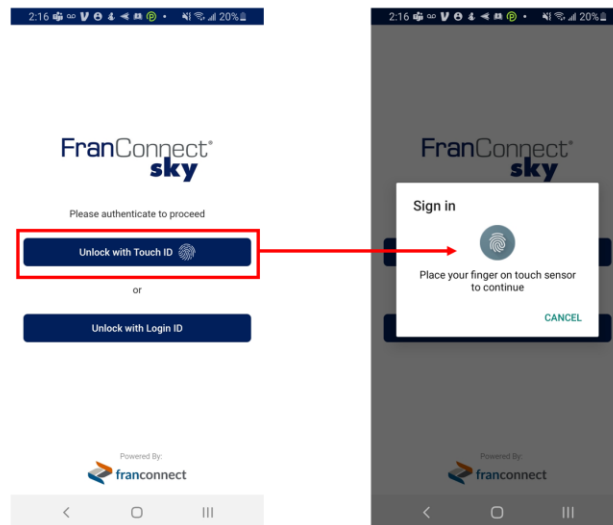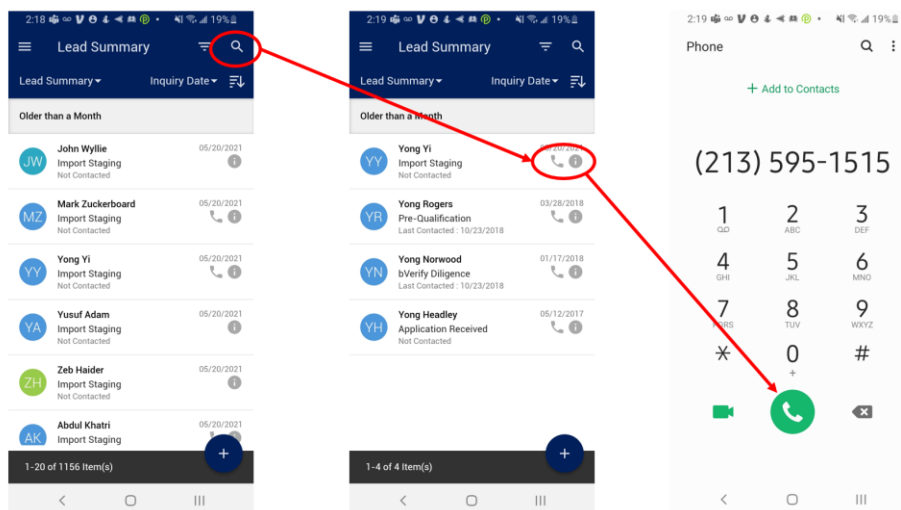

To work with leads in FranConnect Mobile, from the hamburger menu at the top left, choose **Sales > Lead Management.**
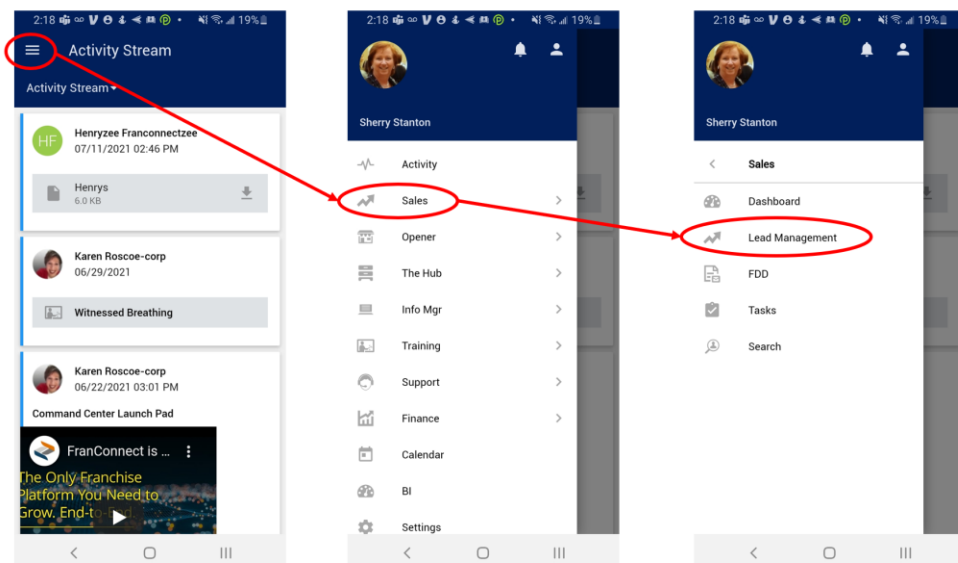
Logging a Call to a Lead

From the Lead Summary Screen, you can use the Magnifier icon to search for text to find your lead. When you've found the record, you can find information (the gray I) or dial them directly with the phone icon.

When your call is complete, choose to "log a call from the lead record. The lead information and call time information and type will be pre-filled. You can then to to the Notes section and choose to type in a summary, or choose the microphone option on your keyboard to dictate the summary by voice.
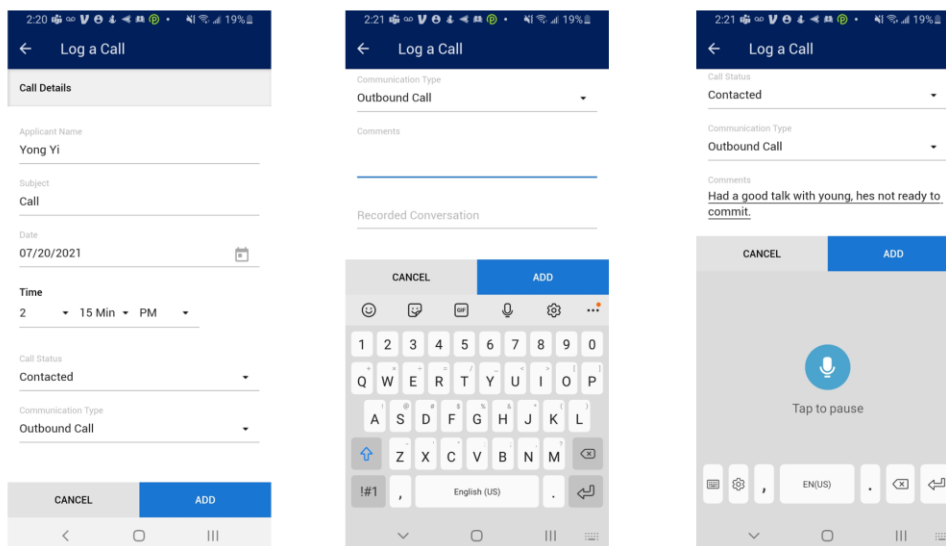
Sending Email to a Lead

You can send an email or SMS message directly to a lead from the FranConnect App. From the lead record, choose "email" (or SMS), and a dialog will open for you to send the message in the way you always do. The transaction will be recorded as though you had sent the message from the desktop application.