FranConnect Administration Guide

Information Manager

About This Guide

This is a guide to configuring and maintaining the Information Manager, the repository of all of your franchisee information.

In this module you can set up campaigns that go out to franchisees at important times in their lifecycles, such as when a lease or a franchise agreement needs to be reviewed and updated. You can also send messages at important times in your franchising year, such as when year-end reporting is due or you would like to have them update their information for your records.

You can customize which information you keep on your franchises using the Form Generator, and get them to fill out information directly using the Web Form Generator.

You can also keep track of transferring ownership of franchises or terminating franchises.

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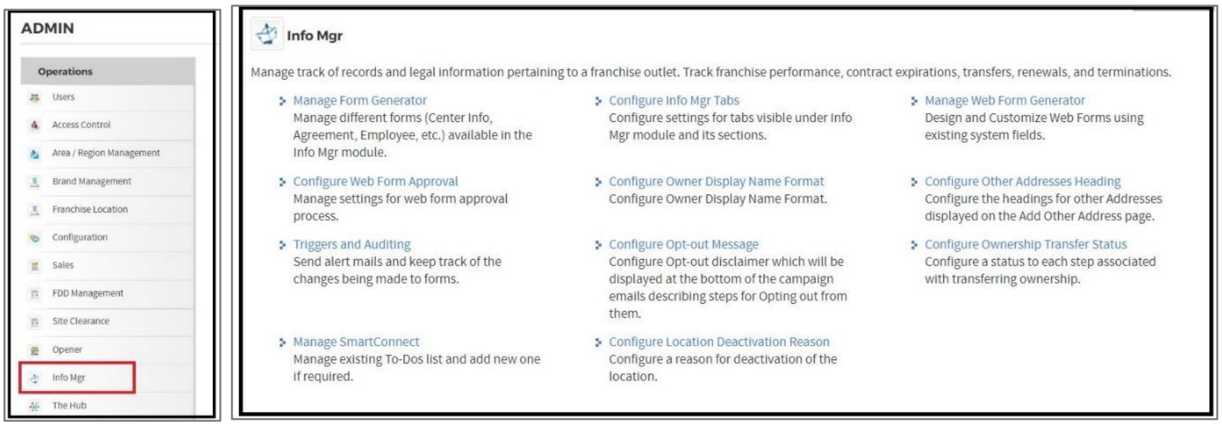
Contents

About Information Manager Admin (Info Mgr)

The administration section of Information Manager allows Corporate Administrators the option to customize the Information Manager Module to fit their business needs. To access the admin section of Information Manager Corporate Administrators will need to follow the steps below to access all admin section Information Manager

1. Navigate to Admin Click **Admin**
2. Scroll down Click **Info Mgr**

Note: Corporate Users may …



Information Manager Settings

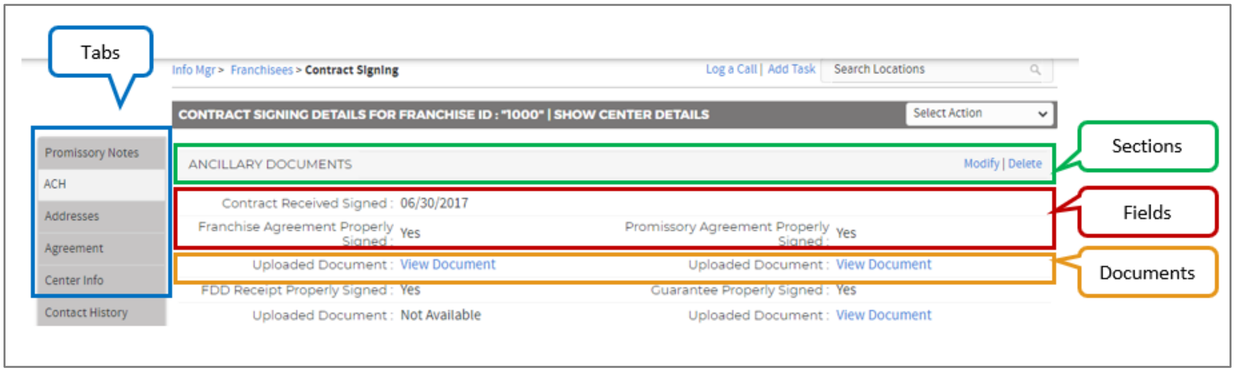
Manage Form Generator

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 date 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.

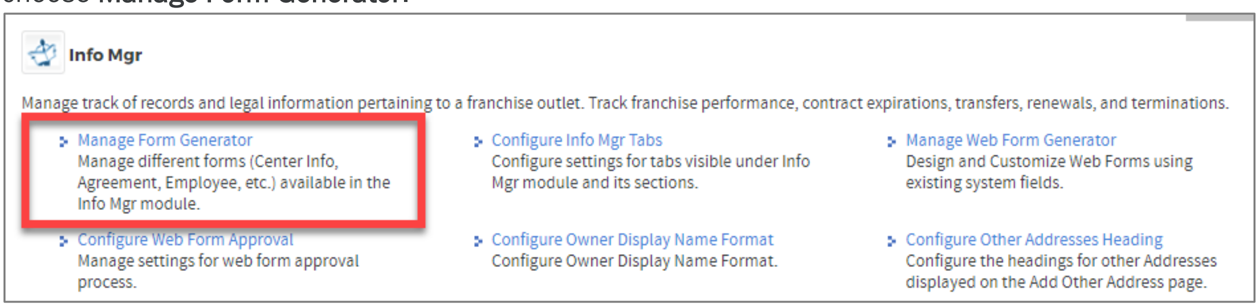


About Tabs

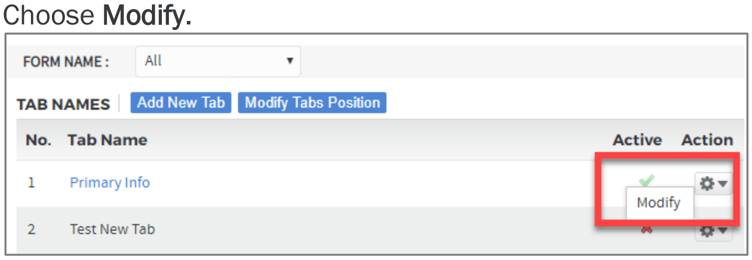
There are tabs that exist by default in the system; these tabs cannot be deleted or deactivated, but their names and order can be changed. In addition, you can make new tabs and position them wherever they make sense in your record. You can deactivate custom tabs at any time.

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**.



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

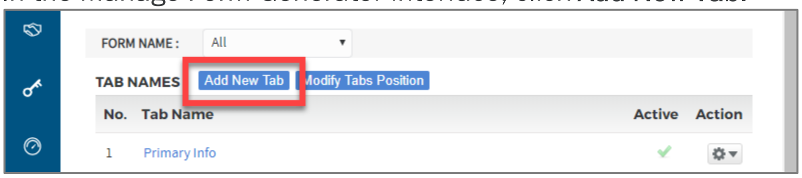


3. Type the desired name of the tab, being careful to avoid special characters. When complete, click **Save**.

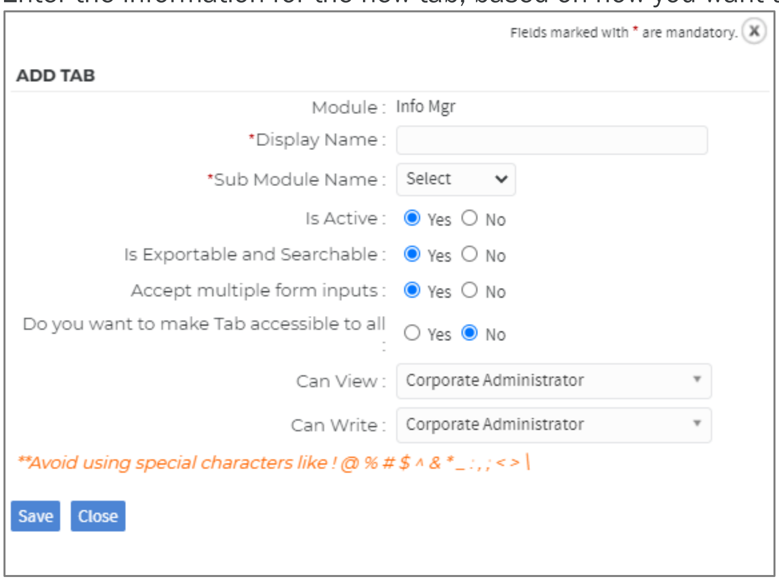
4.

To add a custom tab

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



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



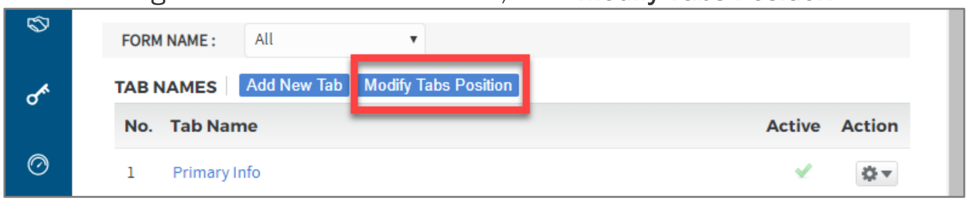
Display Name: the name of the tab, as you wish it to appear in the list. Remember to avoid special characters in this field!
Sub Module Name: for a lead, will always be "Lead Management".
Is Active: whether the field displays to users. To deactivate the tab, choose No.
Is Exportable and Searchable: If 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.

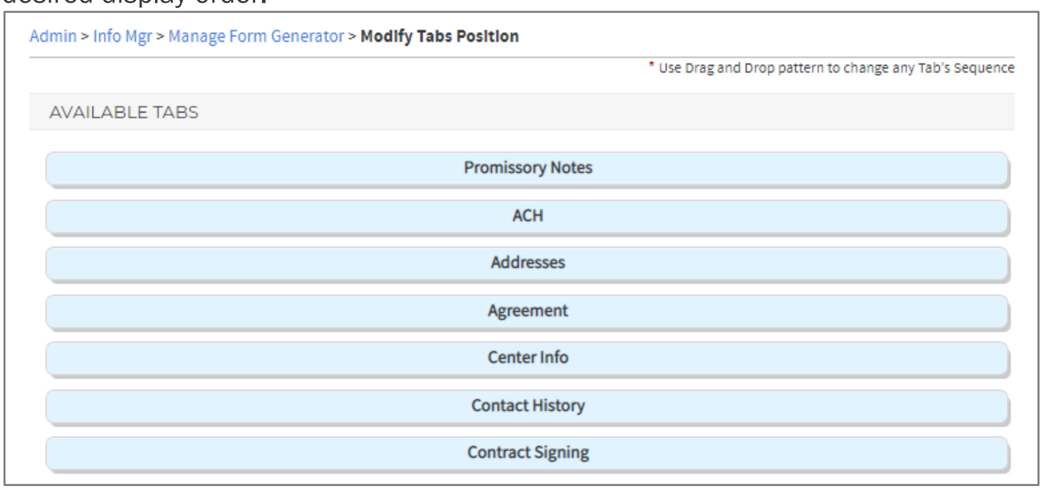
3. Choose **Save**.

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**.

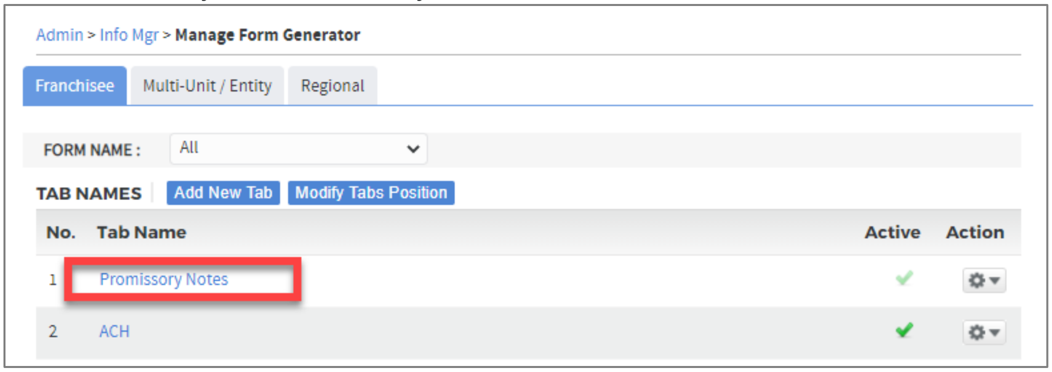
About Sections

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.

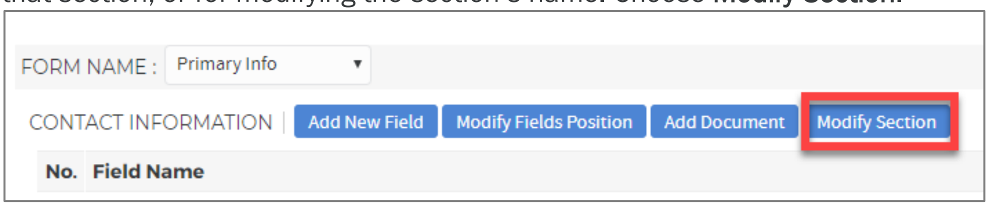
To change the name of a section

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

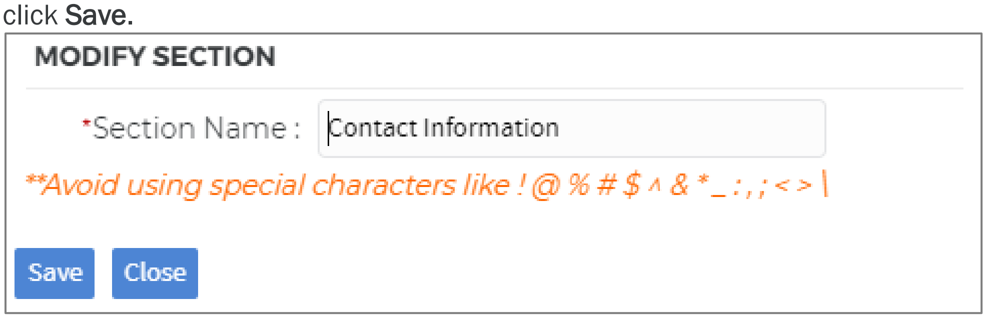
2. Click on the tab you wish to modify.



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**.



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

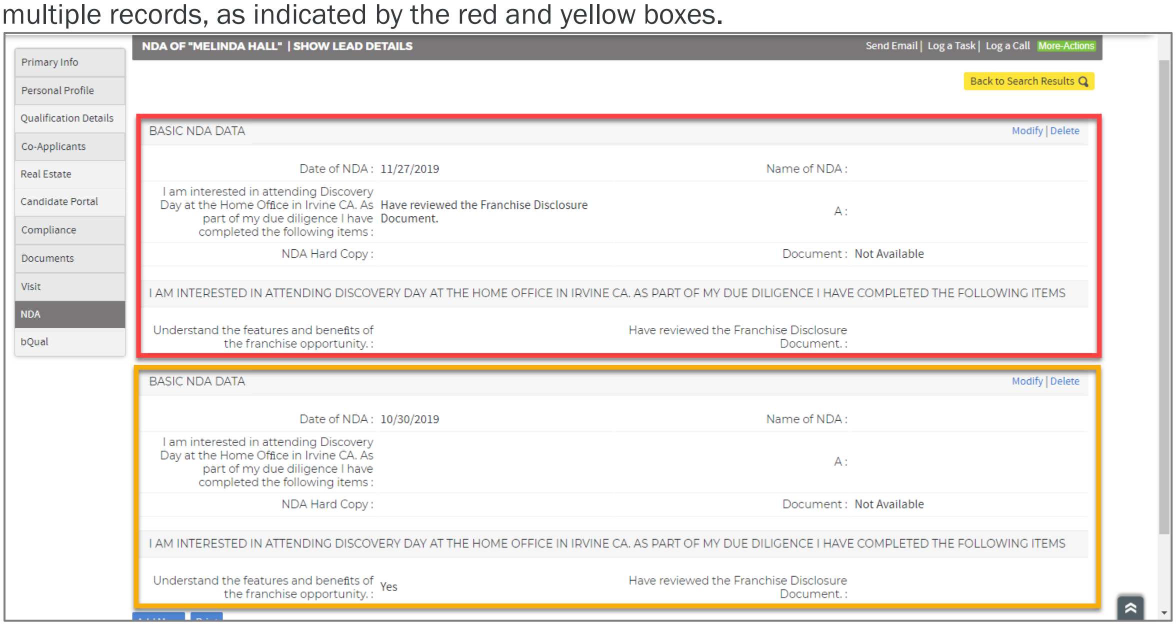


To add a section

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

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

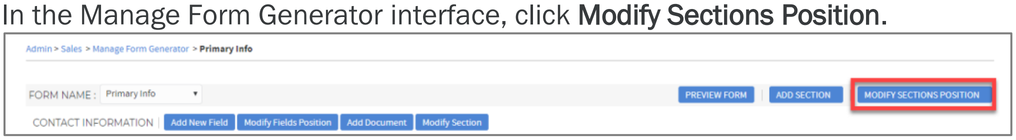
Display Name: the name of the tab, as you wish it to appear in the list. Remember to avoid special characters in this field!
Section Type: Sections can be "regular", meaning that the fields appear once per section, and only the most current information will be saved, for example, Next Renewal Date. Sections 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.



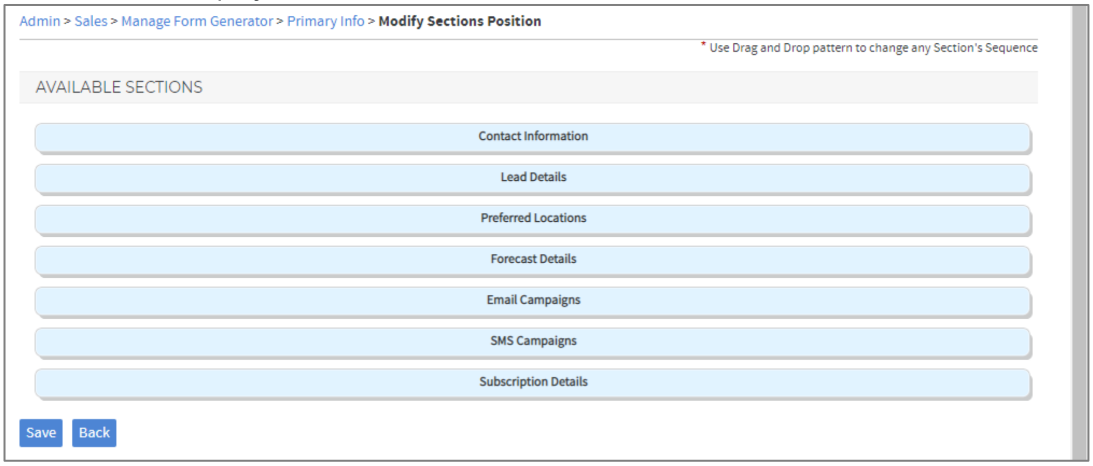
3. Choose **Save.**

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**.

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.

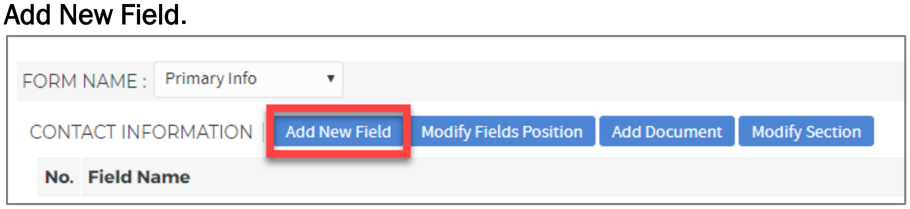
Document Management

- 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**.



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.

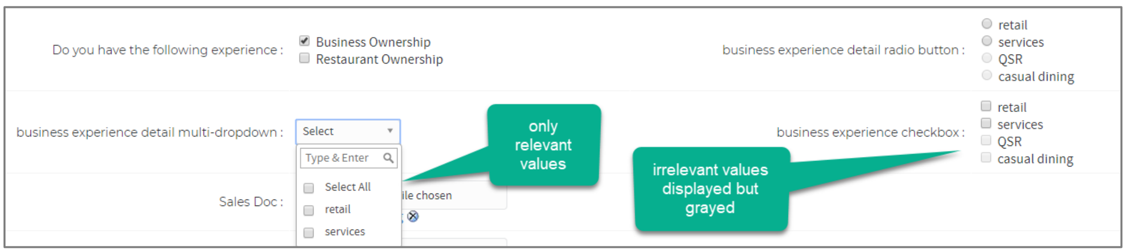
Field Type: indicates the type of data that will be stored in this field, and if desired, how it will be validated as in the right format. Available types are

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.

About dependent values in fields

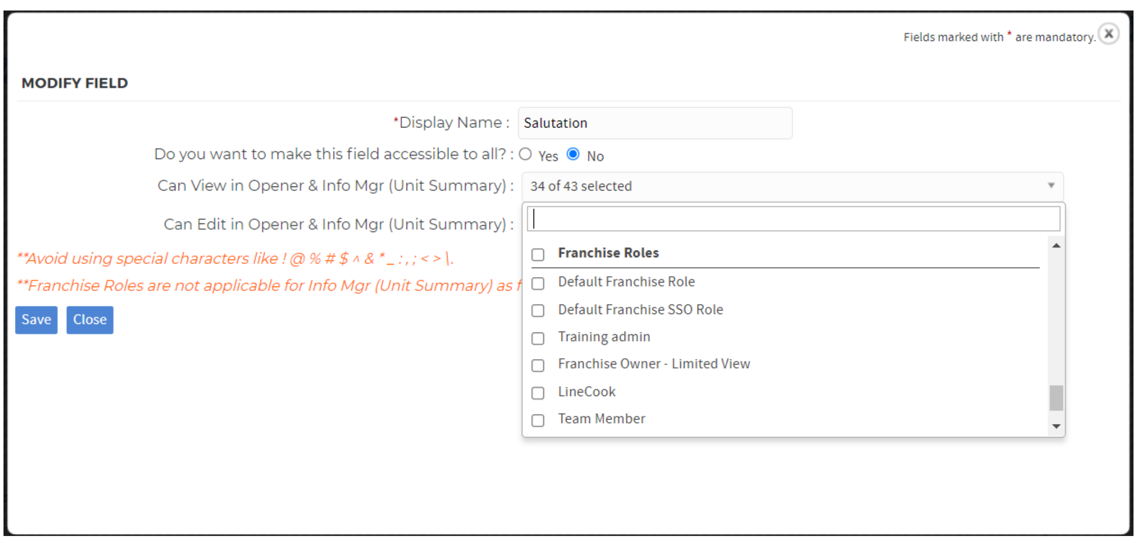
For certain types of fields (drop-down, radio button, checkbox, and multi-select drop-down, you can base the available fields on the values in a previous field. For example, if you ask whether a lead has certain categories of experience, such as business experience or restaurant experience, you may wish 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 bill 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.



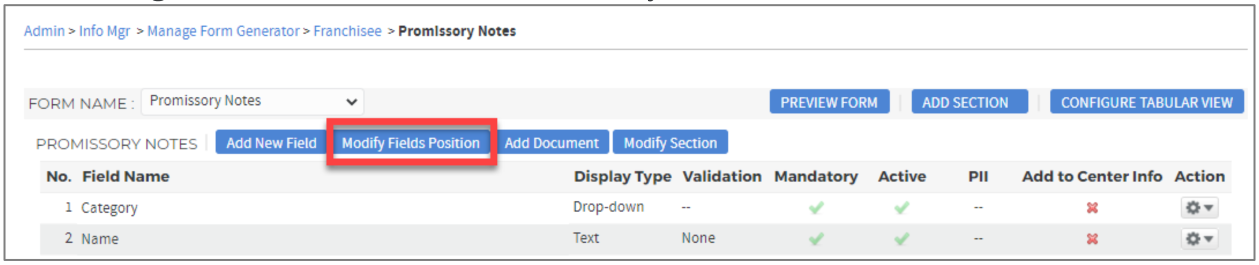
Adding field-level permissions

If you would like to expose fields to users within the Store Summary page of Opener and Info Manager, choose the roles you would like to have access by answering "no" to "Do you want to make this field accessible to all?" You'll see a dialog that lets you choose from existing roles to give permission to see and/or modify fields.

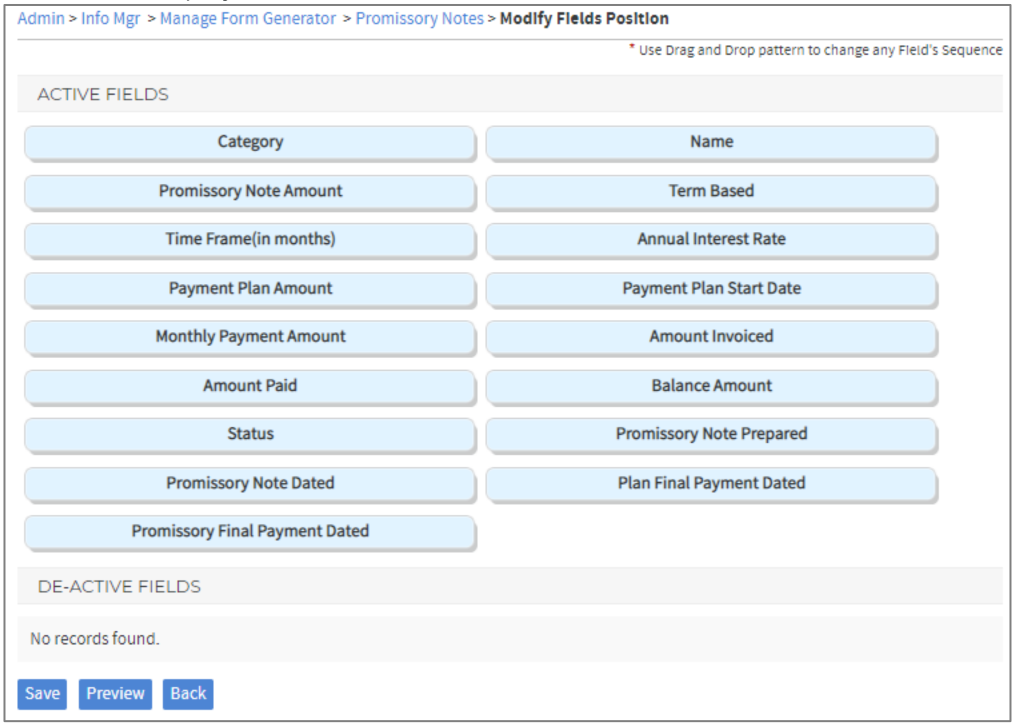


To change the order of fields in the display

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



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



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

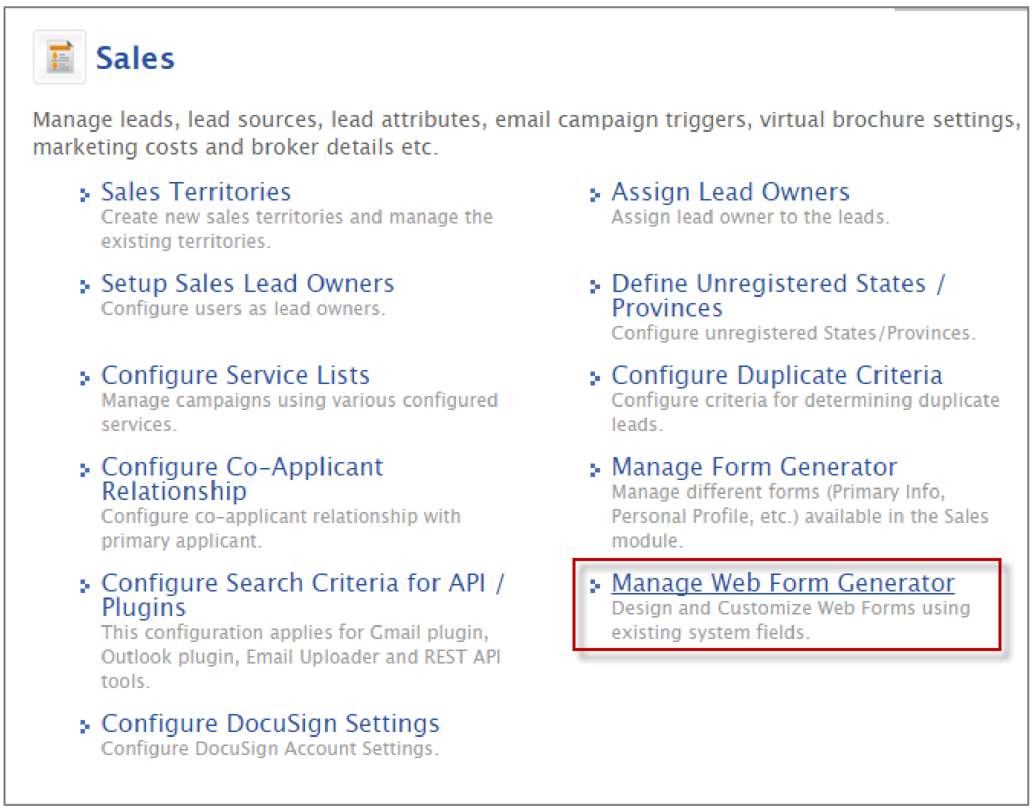
Manage Web Form Generator

Web forms are pages where a lead enters data that is then sent to FranConnect either creating a lead record or adding information to a record. Your FranConnect system comes with standard web forms which can be embedded on your website or used as a hyperlink in an email. The following web forms can be found in Admin under Info Mgr in Manage Web Form Generator.

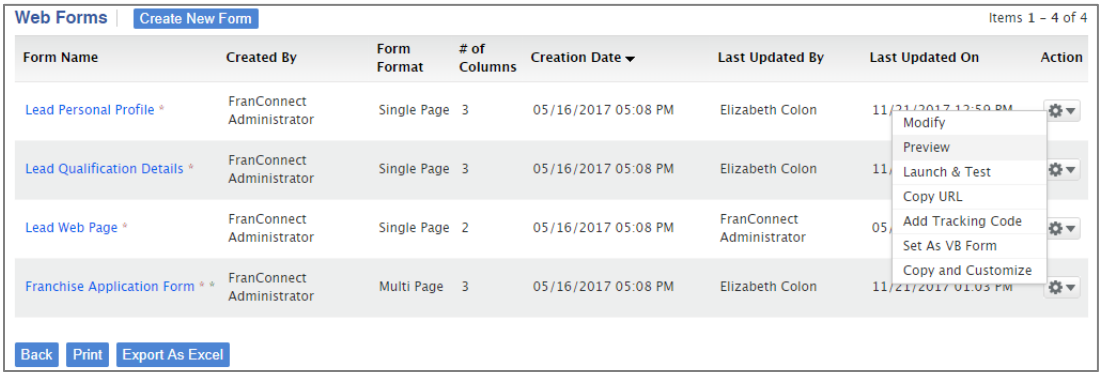
1. Lead Web Page: This form has fields for gathering basic lead information like name, email and phone. It is best used as an initial inquiry form on your website.
2. Lead Personal Profile: This form has fields for gather details about the lead like employment history, business ownership desires and basic background and financial details.
3. Lead Qualification Details: This form provides fields for detailed financial data like, assets and liabilities, real estate, sources of income and liability.

To Embed a Web form on your Website

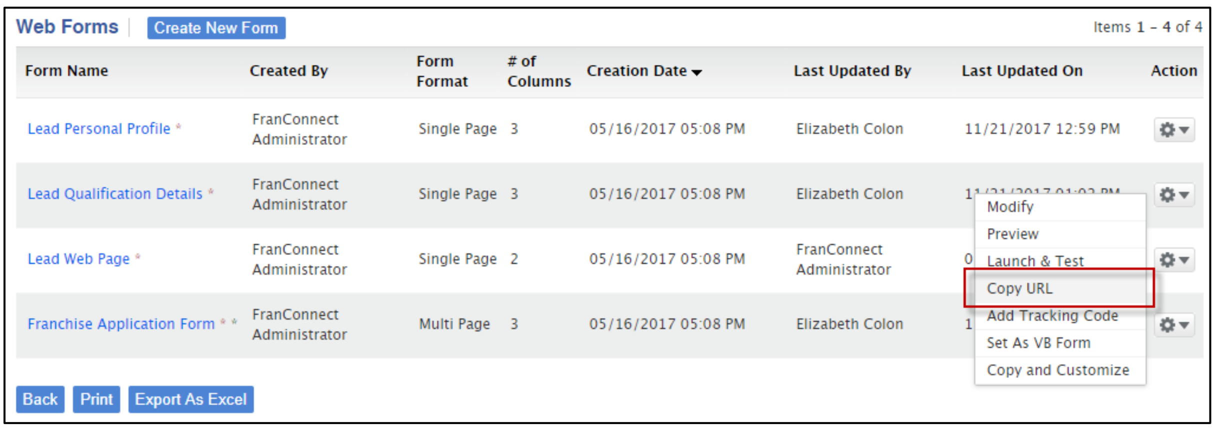
1. From Admin under Info Mgr select **Manage Web Form Generator.**



2. Click the Action wheel to the right of the web form you want to embed (You can select Preview to be sure the form meets your expectations for embedding, if not see Editing Web forms).



3. Select **Copy URL.**



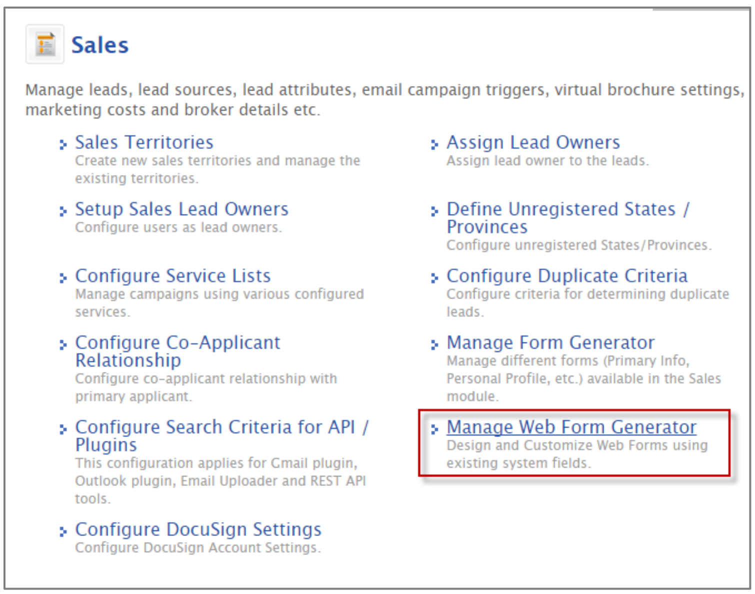
4. Click the radio button for **IFrame Embed Code.**

5. Copy the IFrame Embed Code from the text box.

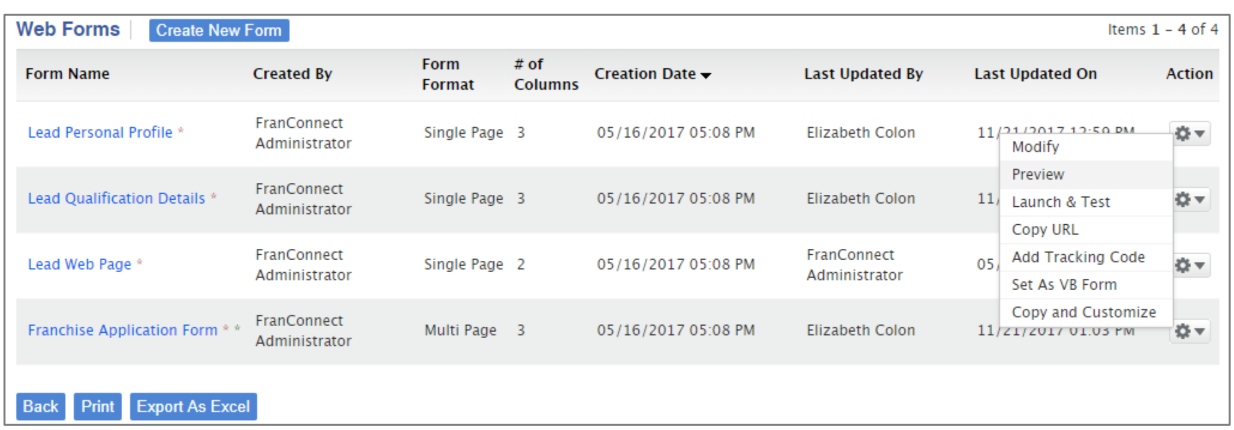
6. Paste the IFrame Embed Code into your website or provide it to your web developer.

To Hyperlink a Web form

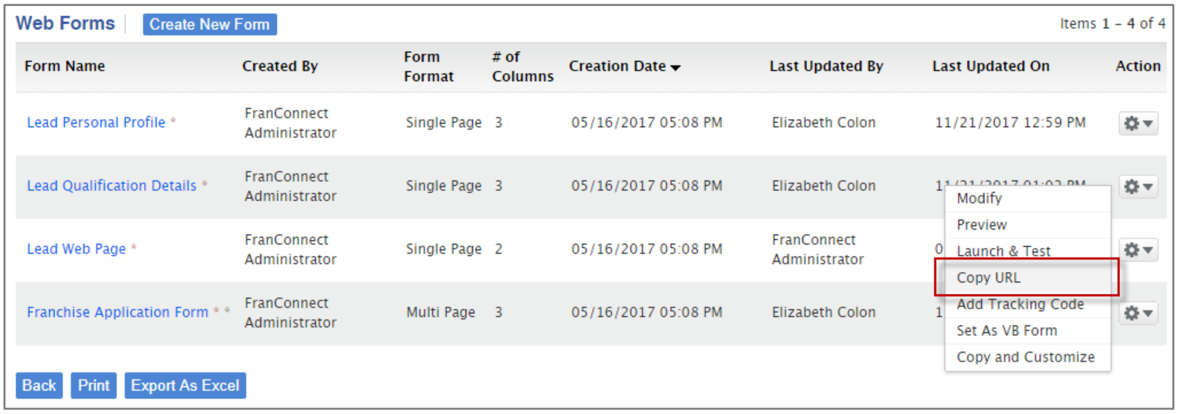
1. From Admin under Info Mgr select **Manage Web Form Generator.**



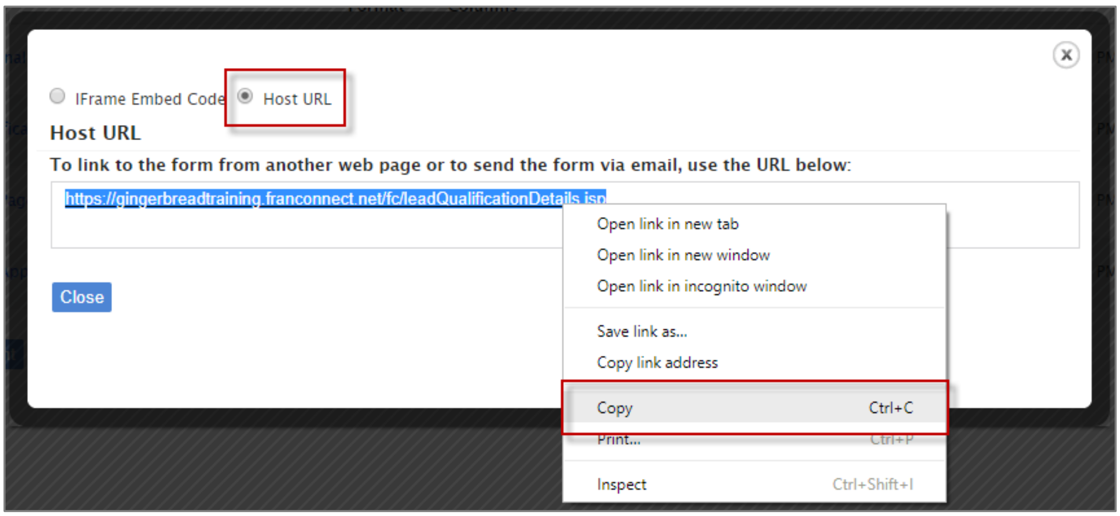
2. Click the Action wheel to the right of the web form you want to hyperlink (You can select Preview to be sure the form meets your expectations for embedding, if not see Editing Web forms).



3. Select **Copy URL.**



4. Click the right mouse button or use CTRL + C to copy the Host URL

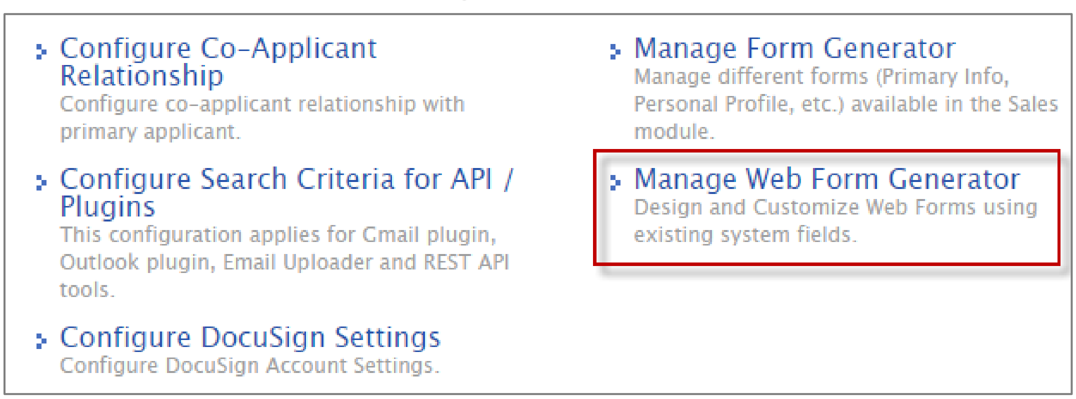


5. Paste into your document as a URL or paste into a Campaign.

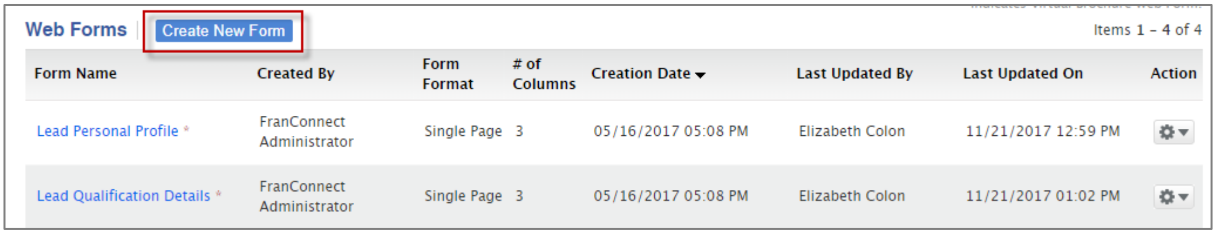
Creating Web forms

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.

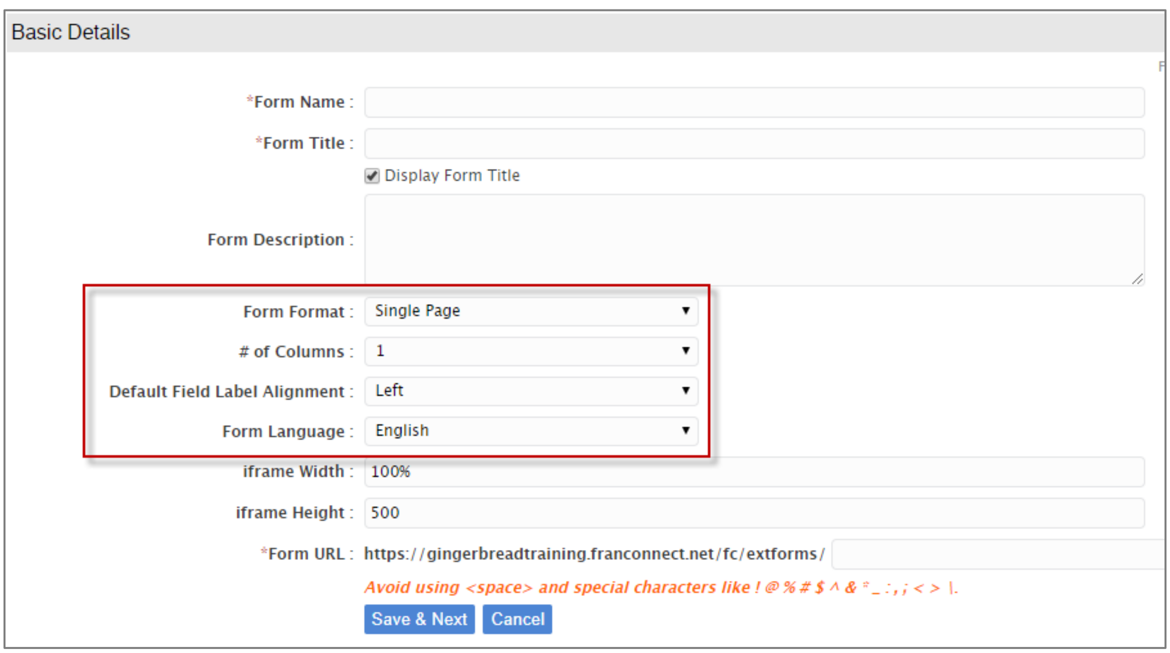
1. From Info Mgr in Admin, select **Manage Web Form Generator.**



2. Click **Create New Form.**

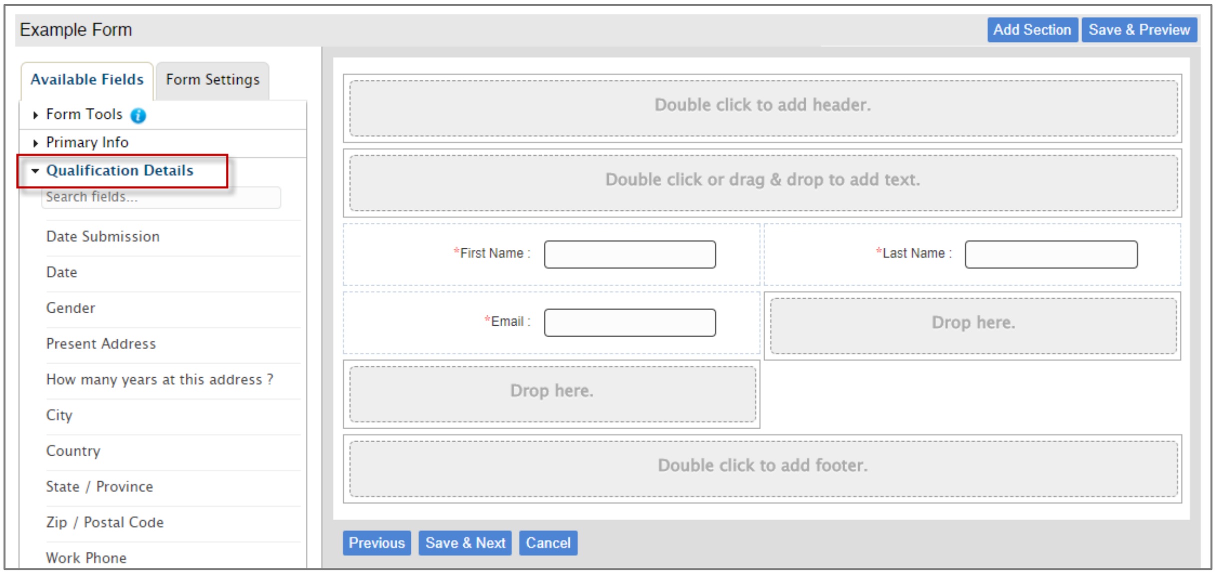


3. Input the **Basic Details**: note that when you click Save & Next the drop-down selections cannot be changed.
   - Form Name: The internal name used for this form.
   - Form Title: The name of the form the lead will see if the Display Form Title box is checked.
   - Form Description: Details about 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.
   - # 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 Veteran Application form you would input Veteran Application).

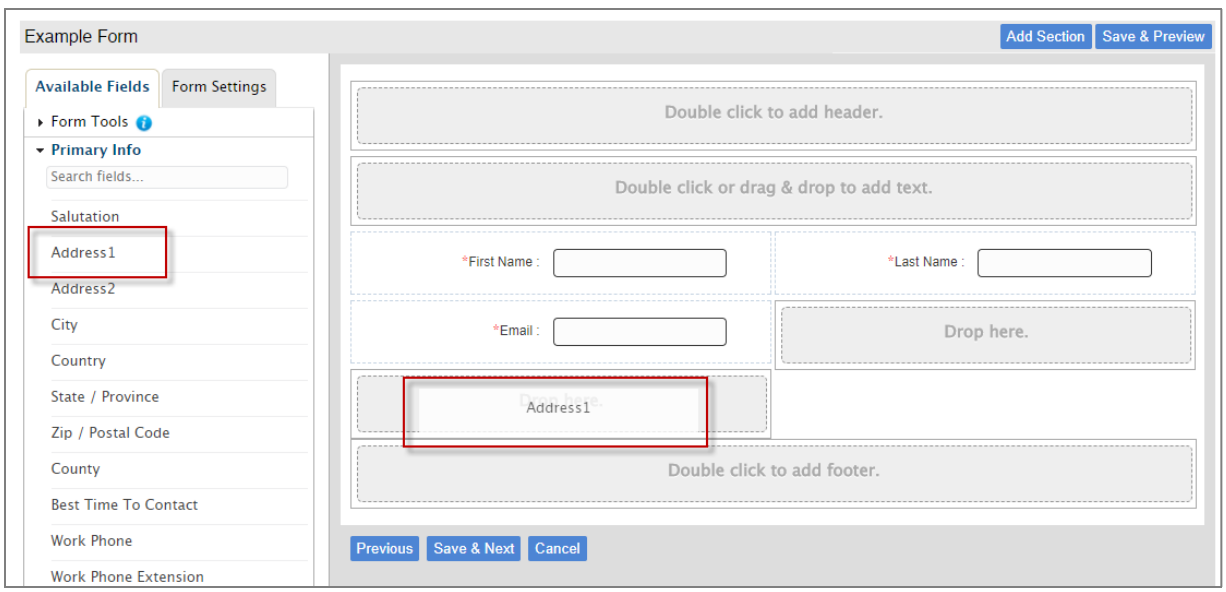


4. Click **Save & Next.**

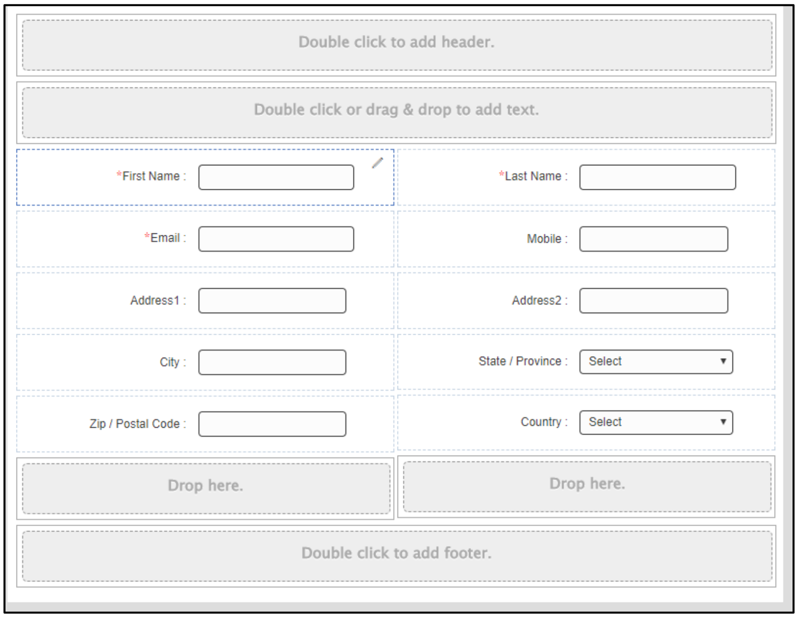
5. The First Name, Last Name and Email will appear as required fields. The remaining fields of the form will need to be added. From the left-hand column, Available Fields, expand the area you want to add fields from.



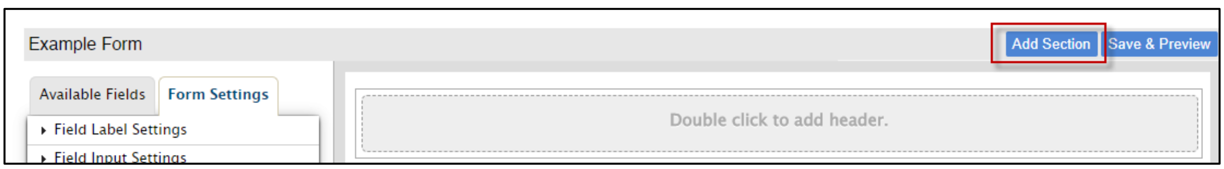
6. Click on the field you want to move to the form, drag and drop it into one of the boxes that say, "drop here."



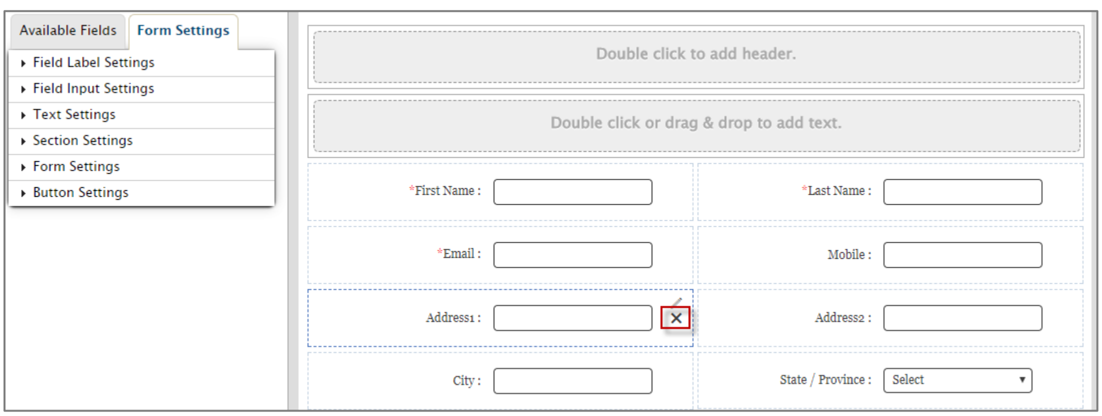
7. Continue to drag and drop fields until the form contains all of the information you want to capture about a lead.



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

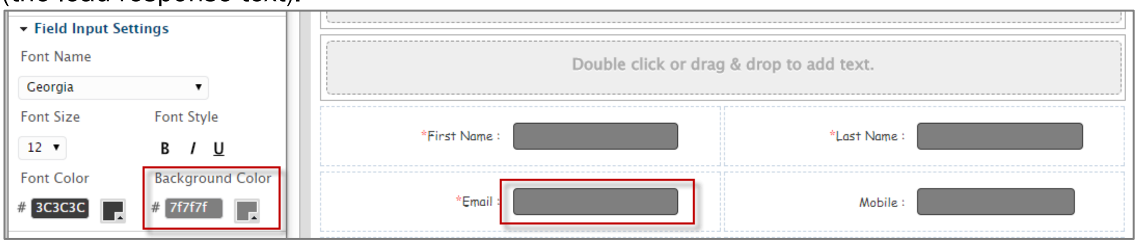


9. You can remove fields by hovering over the field and deleting by using X.

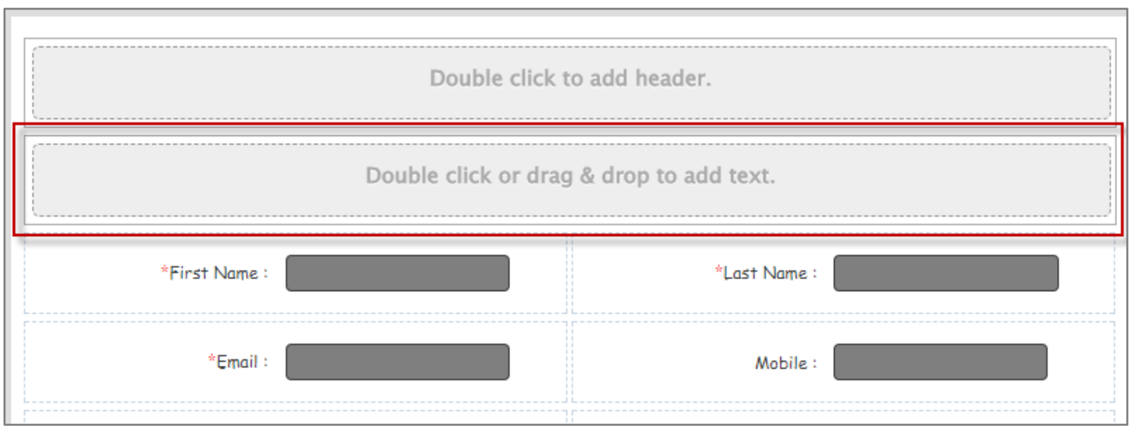


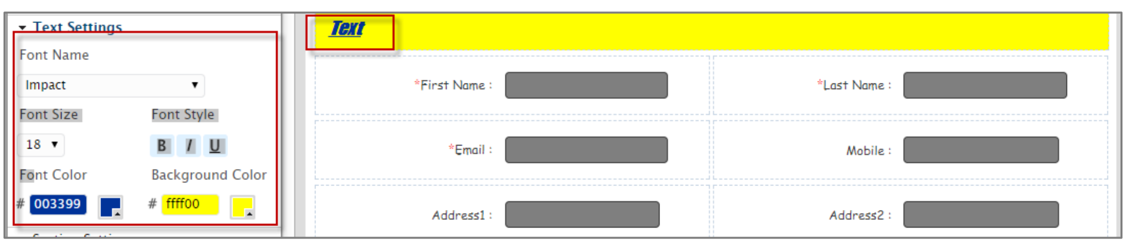
10. From the left-hand column, select **Form Settings.** Use the settings to make edits to the form appearance.
    - Field Label Settings: Allows you to change the font options for the field's labels.

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

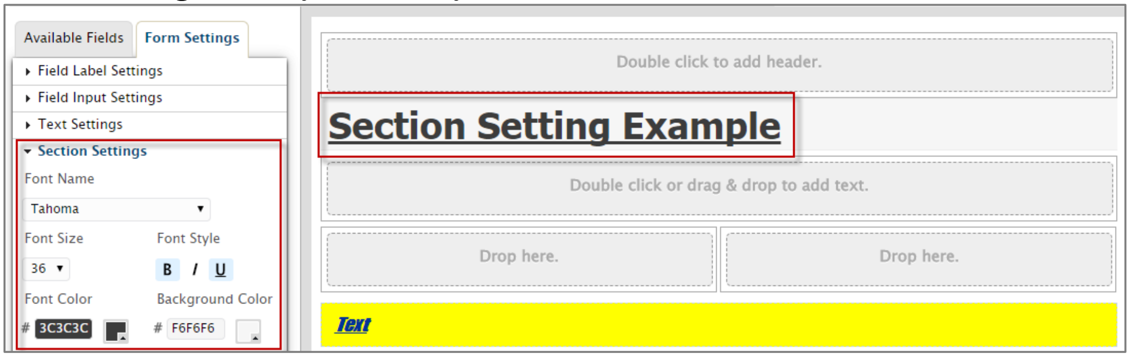


    - Text Settings: Allows you to edit the font text above the form fields.

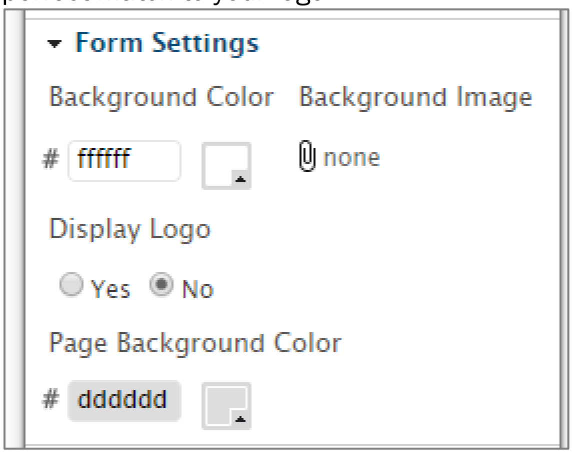




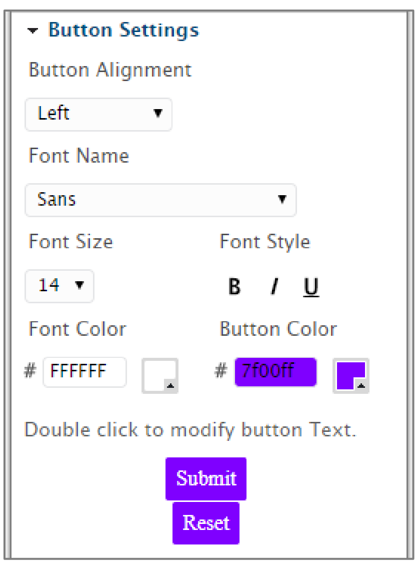
- Section Settings: Allows you to modify the section header font.

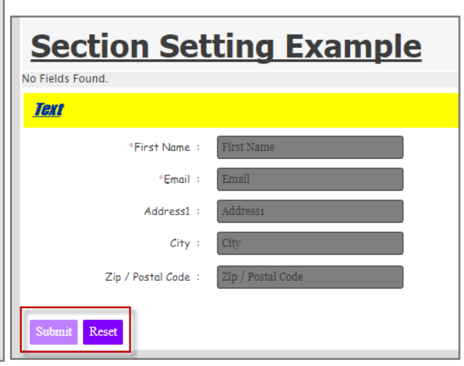


- Form Settings: Allows you to change the background color, background image, display logo and page background color. You will need to know your hex colors for a perfect match to your logo.

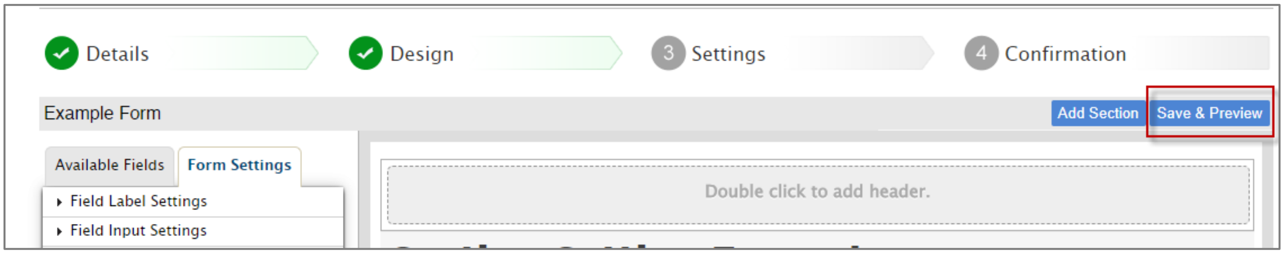


- Button Settings: Allows you to edit the font style and location of buttons on the page.

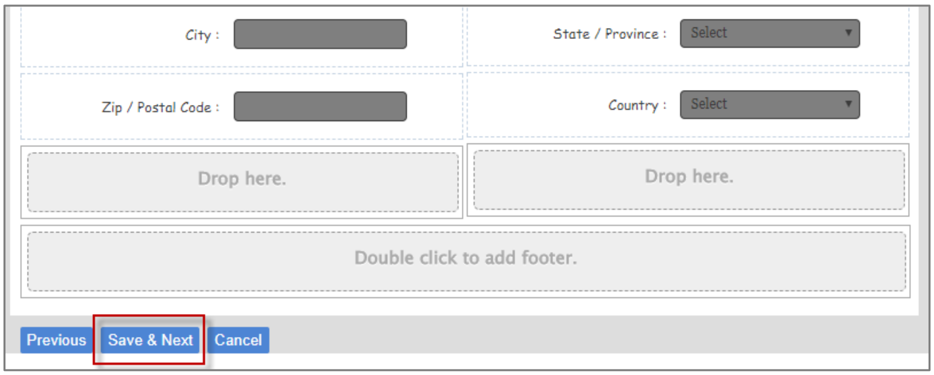




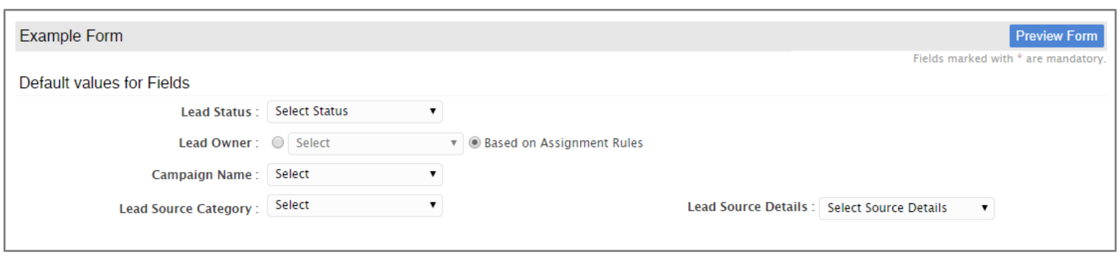
11. When you have completed making edits to your form, click **Save & Preview** to review.



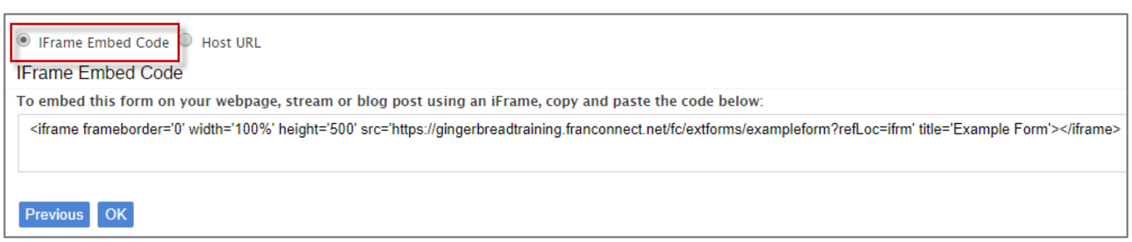
12. If you are happy with your edits click, Save & Next.



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.



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.

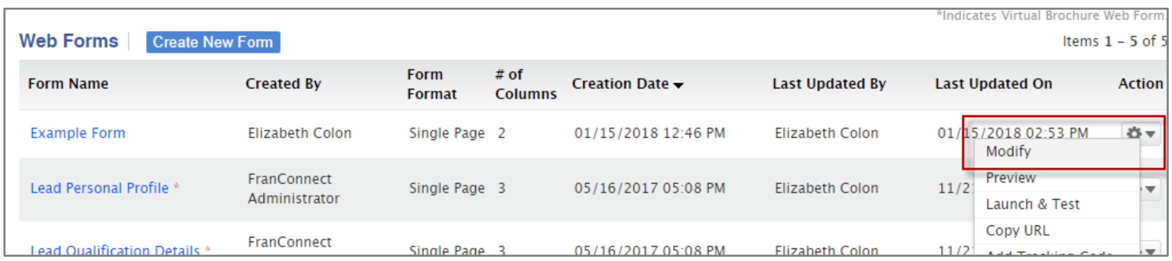


16. Click **OK.** You will be taken back to the Manage Web Form Generator page.

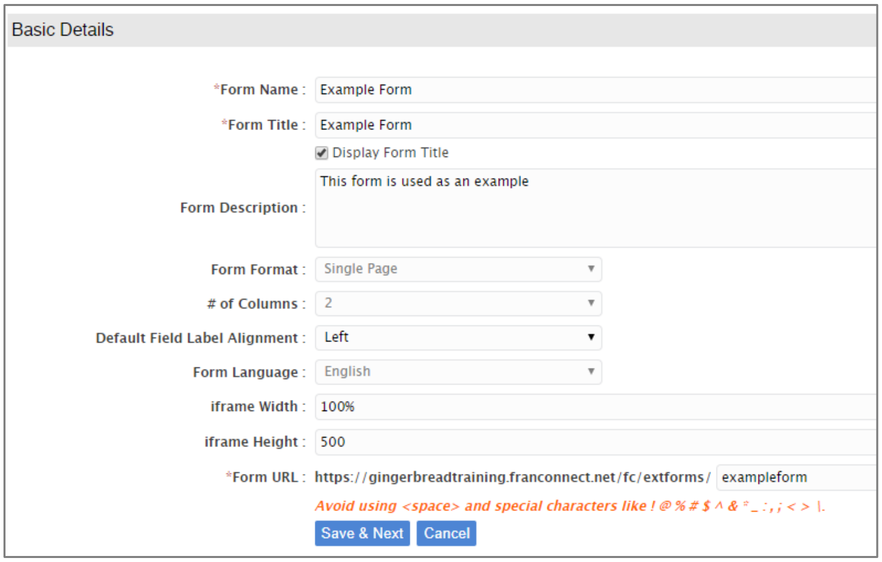
Editing Web forms

If you need to update or add/remove fields from an existing webform, you can make changes via Info Mgr in Admin.

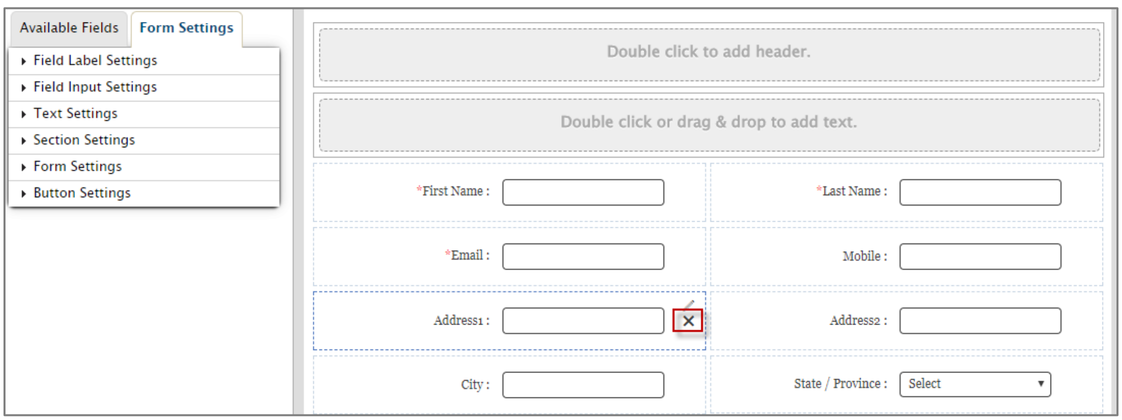
1. Select Web Form Generator then **Modify** from action wheel beside the form you want to update.



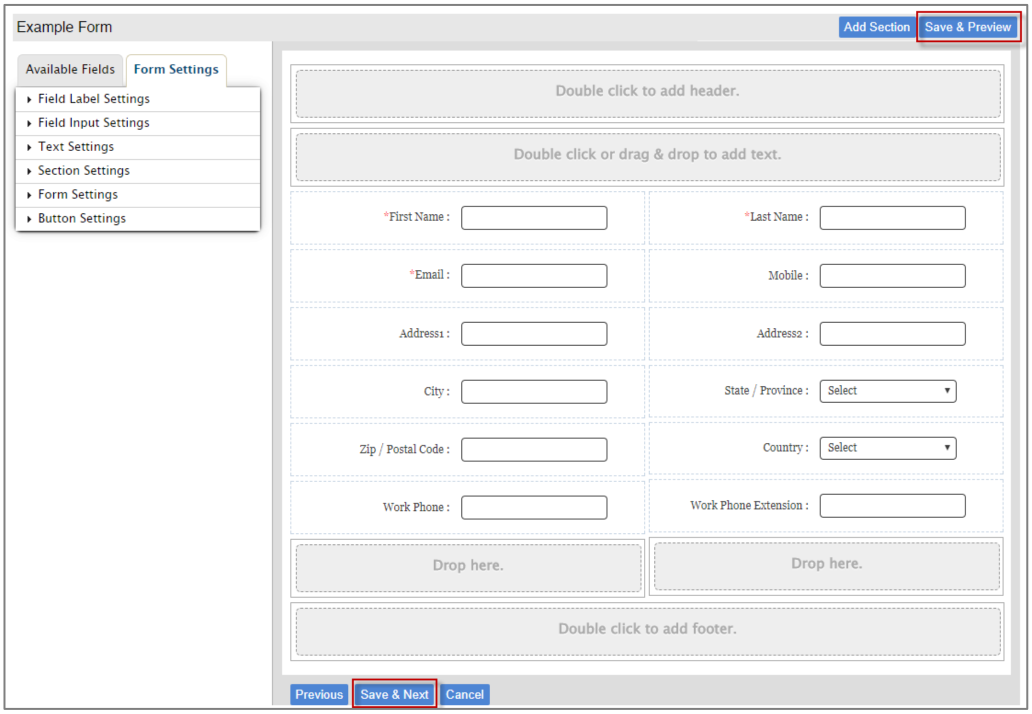
2. From the Details page you can edit the Form Name, Title, Description, Label Alignment and the IFrame Width and Height. You will not be able to edit the Form Format, # of Columns or Language.
   - Form Name: The internal name used for this form.
   - Form Title: The name of the form the lead will see 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.
   - # 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 Veteran Application form you would input Veteran Application).



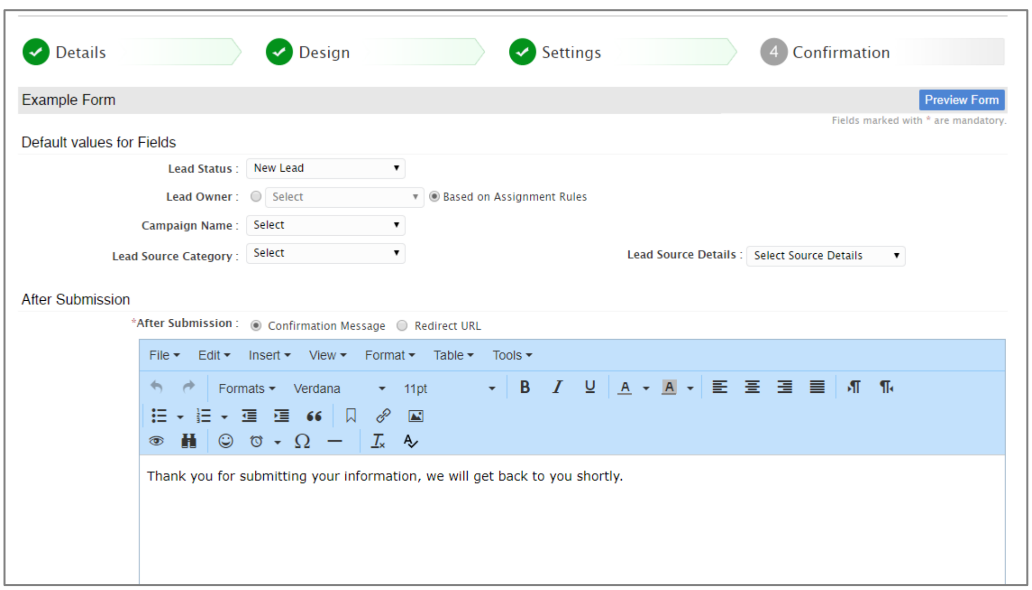
3. Click **Save & Next.**
4. Drag and Drop the fields you want to change from the Available Fields tab in the left-hand column or click the X to remove the field.



5. Click **Save & Preview** to review your changes then **Save & Next** to finalize your edits.



6. 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.



7. Click **Finish.**

8. Once you have completed your changes, the Confirmation page will present you with the IFrame Embed Code or the Host URL. Copy the IFrame Embed Code to input the form on your webpage (you may need to provide it to your web designer). Copy the Host URL as a hyperlink for use in an Email Template or marketing message.

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

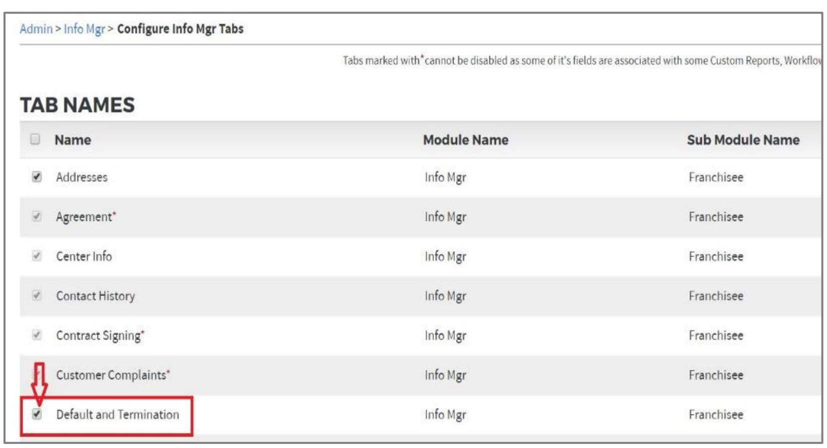
Configure Info Mgr Tabs

Configure settings for tabs visible under Information Manager module and its section.

1. Click **Admin**
2. Click **Info Mgr**
3. Click **Configure Info Mgr Tabs**

Click the checkbox beside the Tab Name to activate or deactivate a Tab Name.

Note: Tabs with * cannot be disabled as some of its fields are associated with Custom Reports, Workflows, Smart Groups or Added to Center Info Tab.



Configure Web Form Approval

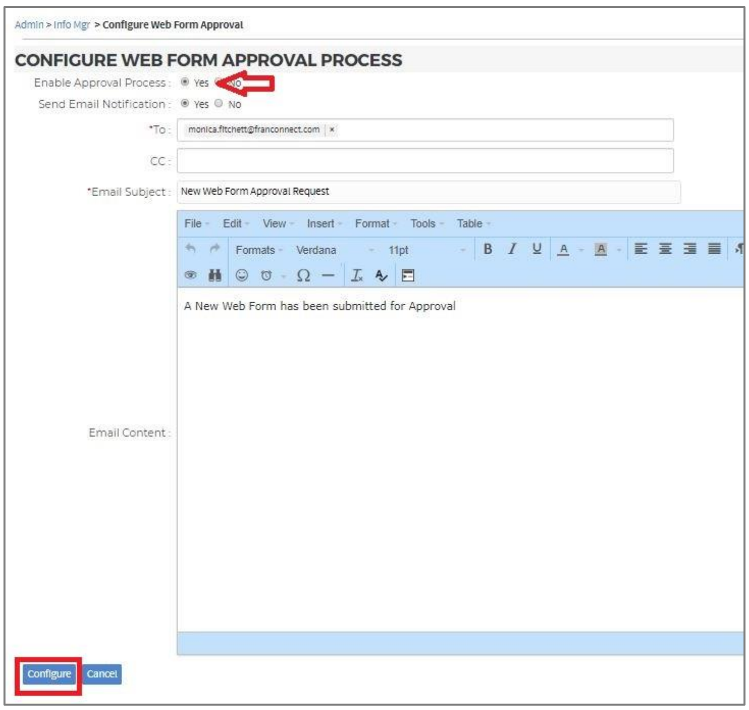
Corporate users can manage the settings for their web form approval process. This process allows users to enable or disable the approval process of webforms that have been submitted.

1. Click **Admin**
2. Click **Info Mgr**
3. Click **Configure Web Form Approval**

To enable the approval process click **Yes**

Notifications can be enabled to be sent to the approver of the web forms to notify them that a web form has been submitted for approval. Corporate users may customize the content.

4. Click **Configure** to save



Configure Owner Display Name Format

Configure Owner Display Name allows Corporate Users to Format the Owners Name by selecting (First Name, Last Name) or (Last Name, First Name)

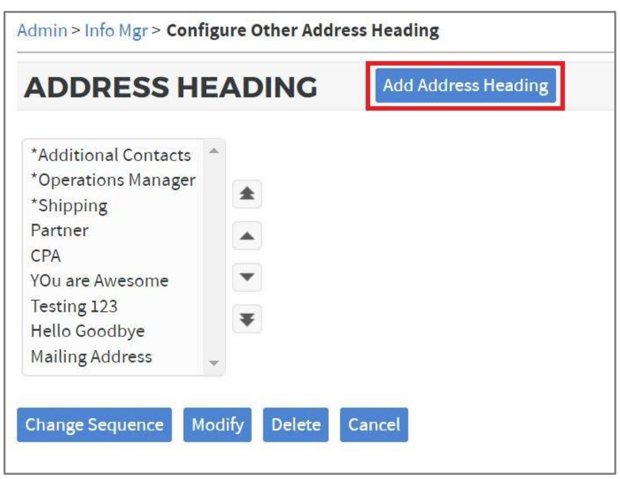
1. Click **Admin**
2. Click **Info Mgr**
3. Click **Configure Owner Display Name Format**
4. Select the desired format option
5. Click **Save**

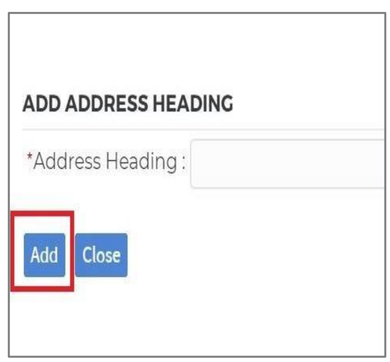
Configure Other Address Heading

Configure headings for other Addresses displayed on the Add Other Address page.

1. Click **Admin**
2. Click **Info Mgr**
3. Click **Configure Other Address Heading**
4. Click **Add Address Heading**
5. After typing in the Address Heading Click **Add**

Note: * Indicates that some Franchisees are associated with the address heading which cannot be deleted. The up and down arrows allow users to select a heading and change the sequence order. Click > **Change Sequence** to Save modifications of order.



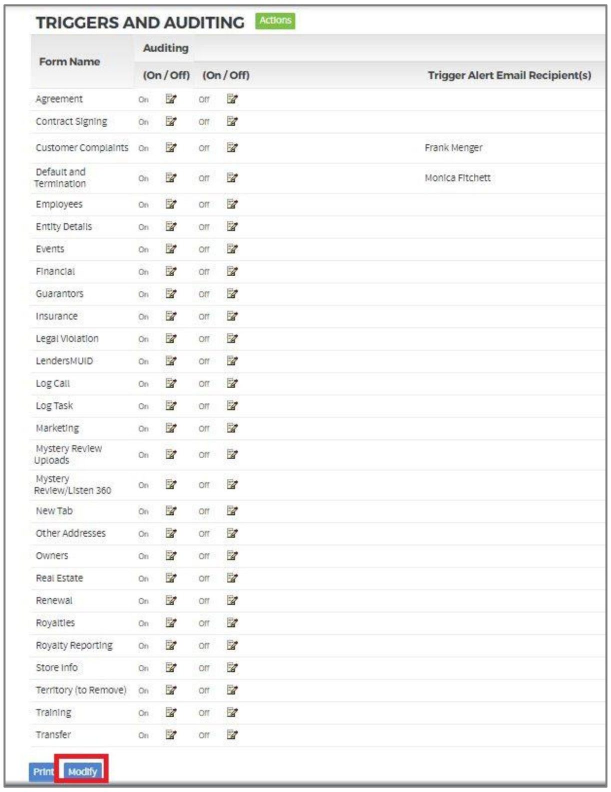


Triggers and Auditing

Corporate Administrators may set up alert emails to notify users of changes made to forms.

1. Navigate to **Admin**
2. Click **Info Mgr**
3. Click **Triggers and Auditing**
4. Scroll to the bottom **Modify**

Note: Corporate Users may select the Form Name individually by placing a check mark under the identified form or use the top checkbox **Enable Audit** to select all forms.



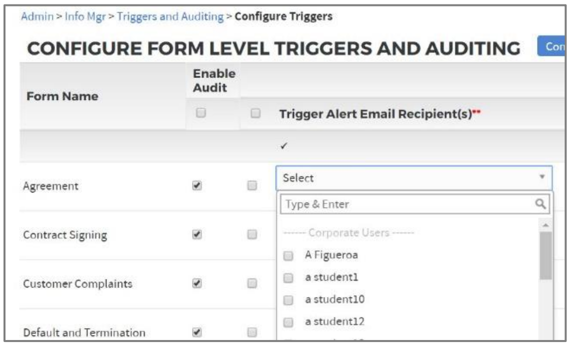
TRIGGERS AND AUDITING Actions

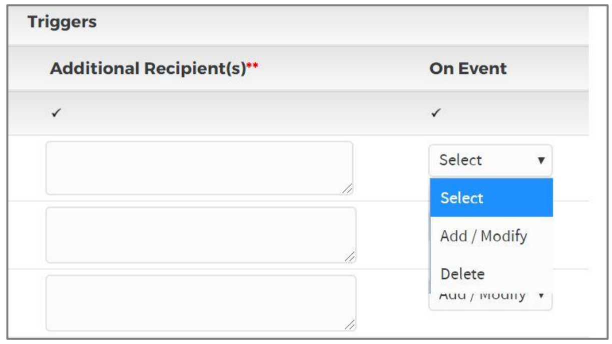
Form Name	Auditing (On / Off)		(On / Off)		Trigger Alert Email Recipient(s)
Agreement	On		Off		
Contract Signing	On		Off		
Customer Complaints	On		Off		Frank Menger
Default and Termination	On		Off		Monica Fitchett
Employees	On		Off		
Entity Details	On		Off		
Events	On		Off		
Financial	On		Off		
Guarantors	On		Off		
Insurance	On		Off		
Legal Violation	On		Off		
LendersMUID	On		Off		
Log Call	On		Off		
Log Task	On		Off		
Marketing	On		Off		
Mystery Review Uploads	On		Off		
Mystery Review/Listen 360	On		Off		
New Tab	On		Off		
Other Addresses	On		Off		
Owners	On		Off		
Real Estate	On		Off		
Renewal	On		Off		
Royalties	On		Off		
Royalty Reporting	On		Off		
Store Info	On		Off		
Territory (to Remove)	On		Off		
Training	On		Off		
Transfer	On		Off		

Print Modify

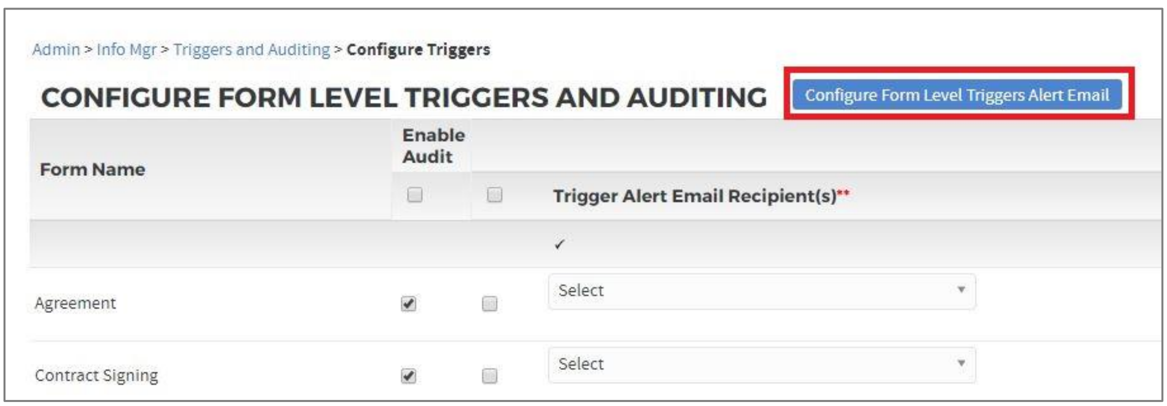
5. Navigate to *Trigger Alert Email Recipients* Select drop-down (select all users that will receive the alert email). To select additional users that may receive alerts insert additional email addresses in the **Additional Recipients** field
6. Navigate to *On Event*, select drop-down Add/Modify/Delete

Note: *On Event* allows users to select the type of modification (Add/Modify/Delete) to the web form that will trigger the notifications to be sent to the recipient to notify them that a modification has taken place to the form.

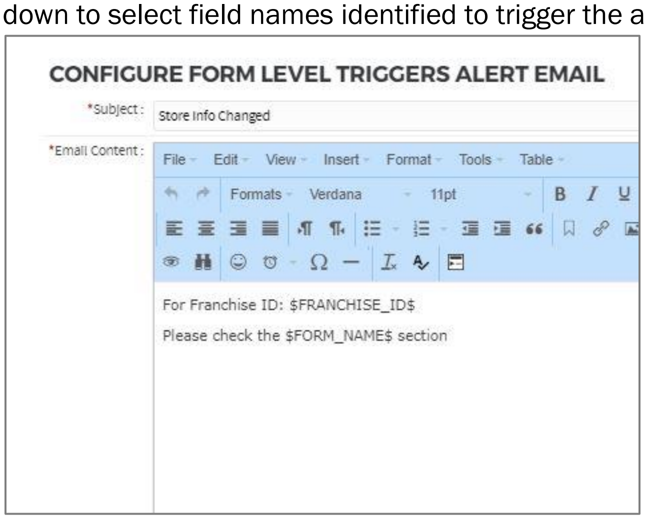


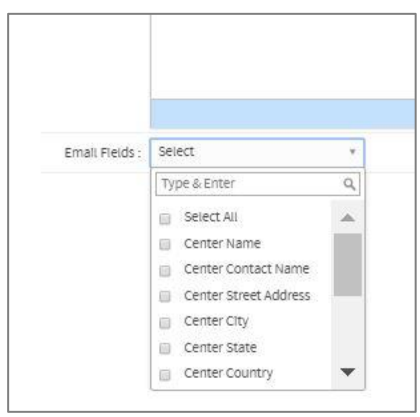


7. Click **Configure Form Level Triggers Alert Email**



Note: Users may customize the email content. Email fields are available for selection in the drop-down to select field names identified to trigger the alert email

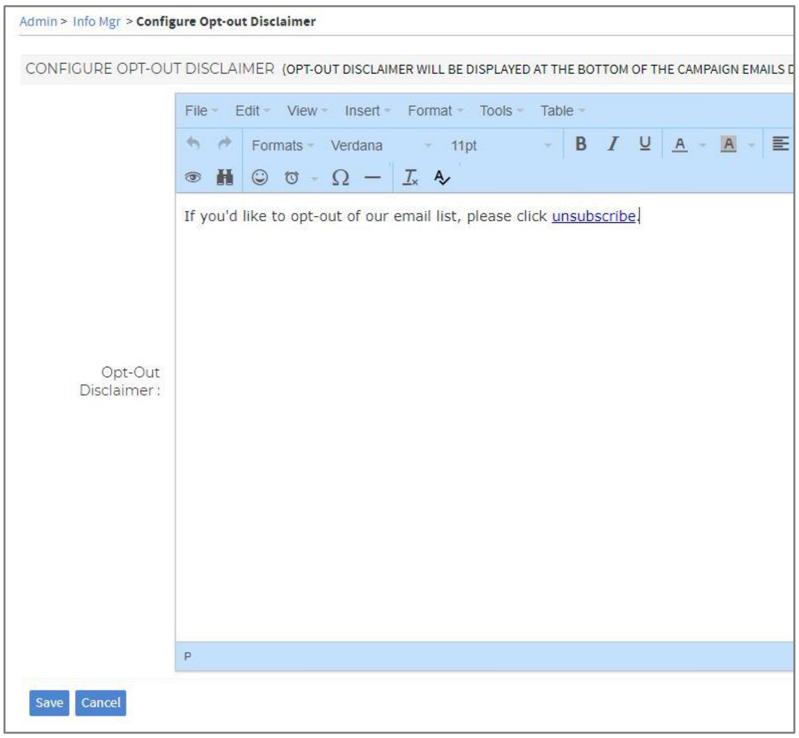




Configure Opt-out Message

Users may customize the Opt-out disclaimer which is displayed at the bottom of the campaign emails describing steps for Opting out from receiving campaigns.

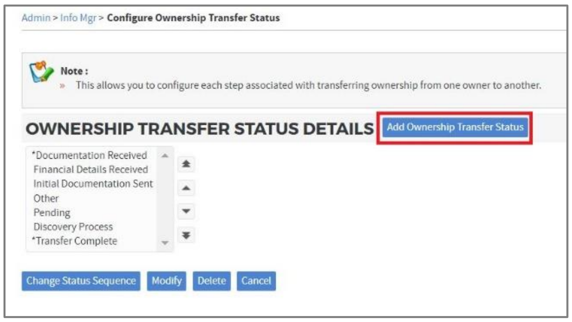
1. Navigate to **Admin**
2. Click **Info Mgr**
3. Click **Configure Opt-out Message**
4. Click **Save**

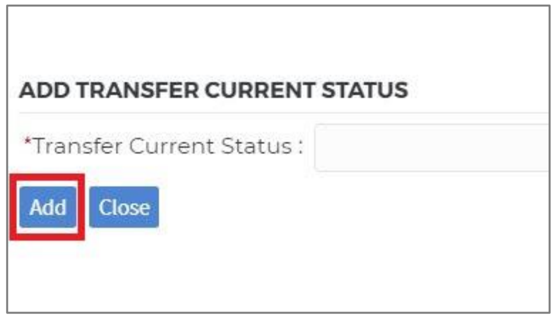


Configure Ownership Transfer Status

Each step associated to the transfer process can be configured through customizing the statuses of the transfer.

1. Navigate to **Admin**
2. Click **Info Mgr**
3. Click **Configure Ownership Transfer Status**
4. Click **Add Ownership Transfer Status**
5. Type in the customized status, Click **Add**



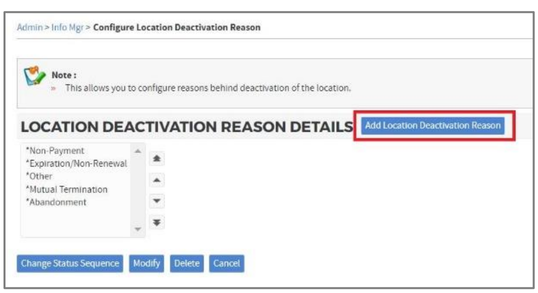


Note: Users may also change the sequence of the transfer status by clicking on the up/down arrows. After the sequence has been updated click **Change Status Sequence** to save data.

Configure Location Deactivation Reason

The reasons for deactivation of locations may be customized

1. Navigate to **Admin**
2. Click **Info Mgr**
3. Click **Configure Location Deactivation Reason**
4. Click **Add Location Deactivation Reason**

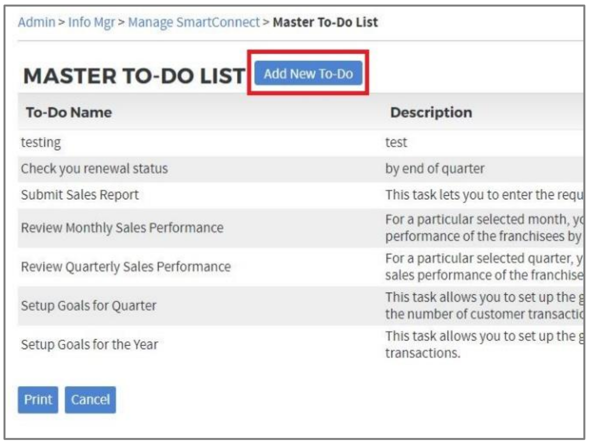


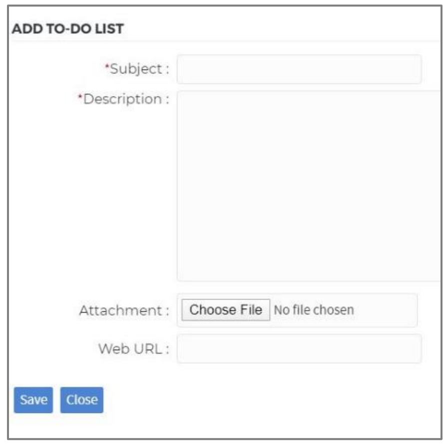
Note: Users may change the status sequence by using the up/down arrows. Click **Change Status Sequence** to save data.

Manage SmartConnect

SmartConnect is a tool that allows communication between Corporate Users and Franchisees. Users are able to manage the existing To Dos list and add new ones.

1. Navigate to **Admin**
2. Click **Info Mgr**
3. Click **Manage SmartConnect**
4. Click **Add New To-Do**
5. Click **Save**





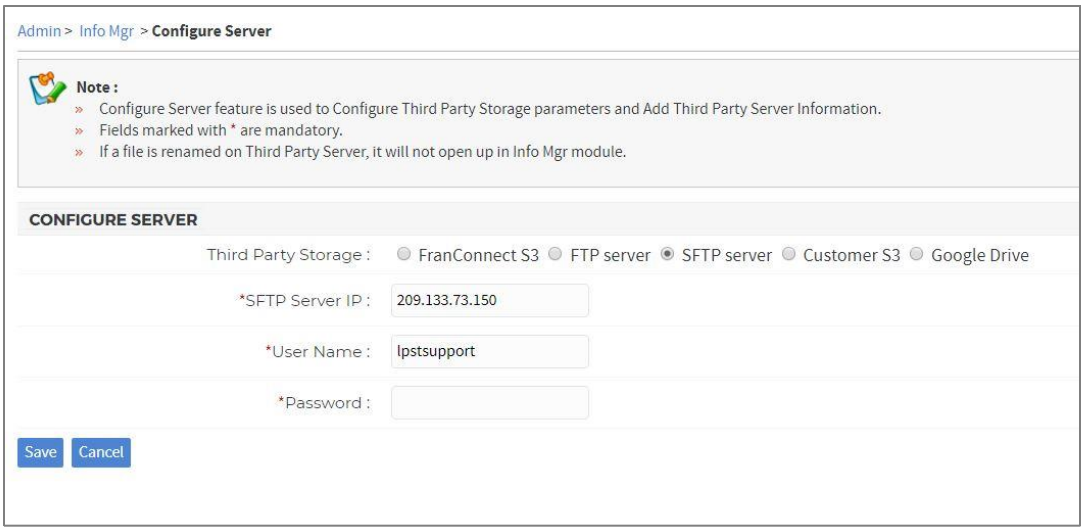
Integrations

Configure Server

Allows users to manage settings for third party servers to be used for Information Manager data storage.

1. Click **Admin**
2. Click **Info Mgr**, Scroll down to *Integrations*
3. Click **Configure Server**

Note: Users must choose the Third-Party Storage options available. Complete the mandatory fields which includes *Username* and *Password*. Click > **Save**

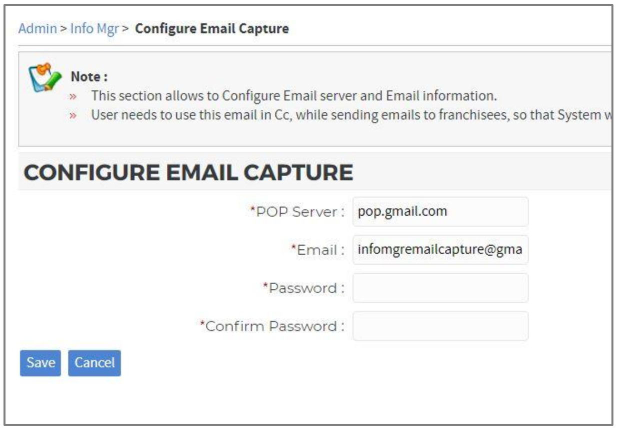


Configure Info Manager Email Capture

This feature allows users to capture emails from their email account to automatically display in the respective Franchisee's Contact History Section. The user will need to use the email address displayed in the Configure Email Capture Email field in the cc of the email to capture the emails in the respective Franchisee's Contact History Section.

Note: This feature would first need to be enabled by the FranConnect development team. The email capture address will be provided from the FranConnect development upon request of the enablement.

1. Click **Admin**
2. Click **Info Mgr**, Scroll down to *Integrations*
3. Click **Configure Info Manager Email Capture**
4. Click **Save**



Configure Search Criteria for API/Plugins

The configuration allows the system to search for records matching the identified criteria. The configured search criteria apply for Gmail plugin, Outlook plugin, Email Uploader and REST API tools. The system will search for records across below selected record types. System will search for records matching any of the below criteria.

1. Click Admin
2. Click **Info Mgr**, Scroll down to *Integrations*
3. Click **Configure Search Criteria for API/Plugins**

Note: Users have the option to select the Field Name and the Criteria by using the drop-down options. After the criteria is chosen.

4. Click **Update**