

# 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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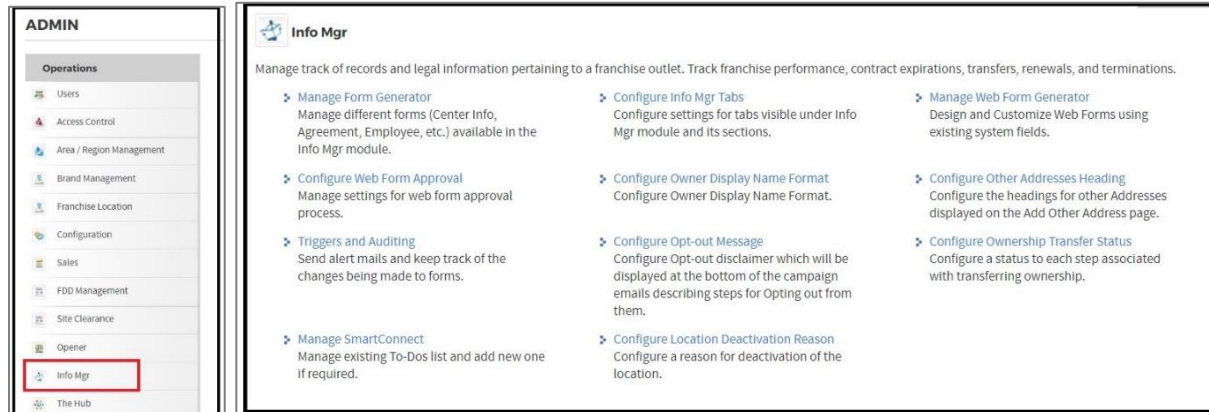
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## About Information Manager Admin (Info Mgr)

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 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.

The screenshot shows a web interface for a franchisee record. A blue callout labeled 'Tabs' points to a sidebar menu with options: Promissory Notes, ACH, Addresses, Agreement, Center Info, and Contact History. A green callout labeled 'Sections' points to the 'ANCILLARY DOCUMENTS' header. A red callout labeled 'Fields' points to a row of data: 'Contract Received Signed : 06/30/2017', 'Franchise Agreement Properly Signed : Yes', and 'Promissory Agreement Properly Signed : Yes'. An orange callout labeled 'Documents' points to a row of links: 'Uploaded Document : View Document' and 'Uploaded Document : View Document'.

## 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**.

The screenshot shows the 'Info Mgr' section of the Admin interface. A red box highlights the 'Manage Form Generator' option, which is described as 'Manage different forms (Center Info, Agreement, Employee, etc.) available in the Info Mgr module.' Other options include 'Configure Info Mgr Tabs', 'Manage Web Form Generator', 'Configure Web Form Approval', 'Configure Owner Display Name Format', and 'Configure Other Addresses Heading'.

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

The screenshot shows the 'Manage Form Generator' page. It has a 'FORM NAME' dropdown set to 'All' and two buttons: 'Add New Tab' and 'Modify Tabs Position'. Below is a table with two tabs: 'Primary Info' and 'Test New Tab'. The 'Primary Info' tab is active. To the right of the 'Primary Info' tab is an action wheel with a 'Modify' button highlighted by a red box.

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

Fields marked with \* are mandatory.

**MODIFY TAB**

Module : Info Mgr

\*Display Name : Promissory Notes

**\*\*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 | ✓      | ⚙️     |

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 : Select

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 : Corporate Administrator

Can Write : Corporate Administrator

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

Save 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!

**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.

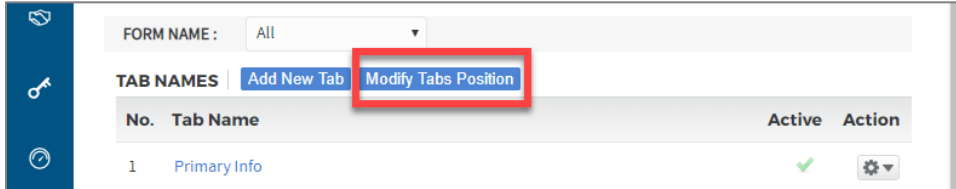
**Tab accessibility:** most tabs are available for all people to view, but you may want to restrict some users from seeing some information, for example, extra financial information or

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.

Admin > Info Mgr > Manage Form Generator

Franchisee Multi-Unit / Entity Regional

FORM NAME : All

TAB NAMES | Add New Tab Modify Tabs Position

| No. | Tab Name         | Active | Action |
|-----|------------------|--------|--------|
| 1   | Promissory Notes | ✓      | ⚙️     |
| 2   | ACH              | ✓      | ⚙️     |

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. ✕

**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.

**NDA OF "MELINDA HALL" | SHOW LEAD DETAILS** Send Email | Log a Task | Log a Call | More Actions

[Back to Search Results](#) Q

**Primary Info**

**Personal Profile**

**Qualification Details**

**Co-Applicants**

**Real Estate**

**Candidate Portal**

**Compliance**

**Documents**

**Visit**

**NDA**

**bQual**

**BASIC NDA DATA** Modify | Delete

Date of NDA: 11/27/2019 Name of NDA:

I am interested in attending Discovery Day at the Home Office in Irvine CA. As part of my due diligence I have completed the following items: Have reviewed the Franchise Disclosure Document. A:

NDA Hard Copy: Document: Not Available

I AM INTERESTED IN ATTENDING DISCOVERY DAY AT THE HOME OFFICE IN IRVINE CA. AS PART OF MY DUE DILIGENCE I HAVE COMPLETED THE FOLLOWING ITEMS

Understand the features and benefits of the franchise opportunity.: Have reviewed the Franchise Disclosure Document.:

**BASIC NDA DATA** Modify | Delete

Date of NDA: 10/30/2019 Name of NDA:

I am interested in attending Discovery Day at the Home Office in Irvine CA. As part of my due diligence I have completed the following items: Have reviewed the Franchise Disclosure Document. A:

NDA Hard Copy: Document: Not Available

I AM INTERESTED IN ATTENDING DISCOVERY DAY AT THE HOME OFFICE IN IRVINE CA. AS PART OF MY DUE DILIGENCE I HAVE COMPLETED THE FOLLOWING ITEMS

Understand the features and benefits of the franchise opportunity.: Yes Have reviewed the Franchise Disclosure Document.:

3. Choose **Save**.

To change the order of sections in the display

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

Admin > Sales > Manage Form Generator > Primary Info

FORM NAME: Primary Info PREVIEW FORM ADD SECTION MODIFY SECTIONS POSITION

CONTACT INFORMATION ADD NEW FIELD MODIFY FIELDS POSITION ADD DOCUMENT MODIFY SECTION



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

Admin > Sales > Manage Form Generator > Primary Info > **Modify Sections Position**

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

AVAILABLE SECTIONS

|                      |
|----------------------|
| Contact Information  |
| Lead Details         |
| Preferred Locations  |
| Forecast Details     |
| Email Campaigns      |
| SMS Campaigns        |
| Subscription Details |

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

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.

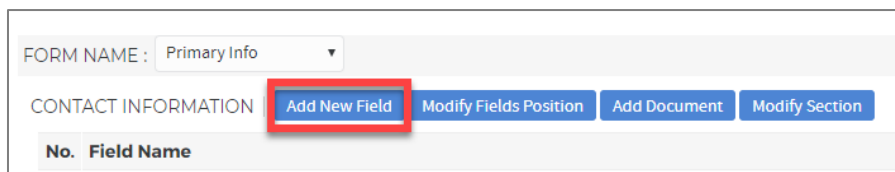
### Document Management

- 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.

Fields marked with \* are mandatory.

**ADD NEW FIELD**

\*Display Name:

Is Exportable and Searchable? ☒ Yes ☐ No

Field Type:

\*Maximum Length:  Maximum length is 255 characters

Validation:

*\*\*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!

**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 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.

Do you have the following experience : ☒ Business Ownership ☐ Restaurant Ownership

business experience detail multi-dropdown :

Sales Doc : ☐ Select All ☐ retail ☐ services

business experience detail radio button : ☐ retail ☐ services ☐ QSR ☐ casual dining

business experience checkbox : ☐ retail ☐ services ☐ QSR ☐ 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.

Fields marked with \* are mandatory.

**MODIFY FIELD**

\*Display Name : Salutation

Do you want to make this field accessible to all? : ☐ Yes ☒ No

Can View in Opener & Info Mgr (Unit Summary) : 34 of 43 selected

Can Edit in Opener & Info Mgr (Unit Summary) :

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

\*\*Franchise Roles are not applicable for Info Mgr (Unit Summary) as f

☐ **Franchise Roles**

- ☐ Default Franchise Role
- ☐ Default Franchise SSO Role
- ☐ Training admin
- ☐ Franchise Owner - Limited View
- ☐ LineCook
- ☐ Team Member

## To change the order of fields in the display

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

Admin > Info Mgr > Manage Form Generator > Franchisee > Promissory Notes

FORM NAME: Promissory Notes PREVIEW FORM ADD SECTION CONFIGURE TABULAR VIEW

PROMISSORY NOTES Add New Field **Modify Fields Position** Add Document Modify Section

| 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**.

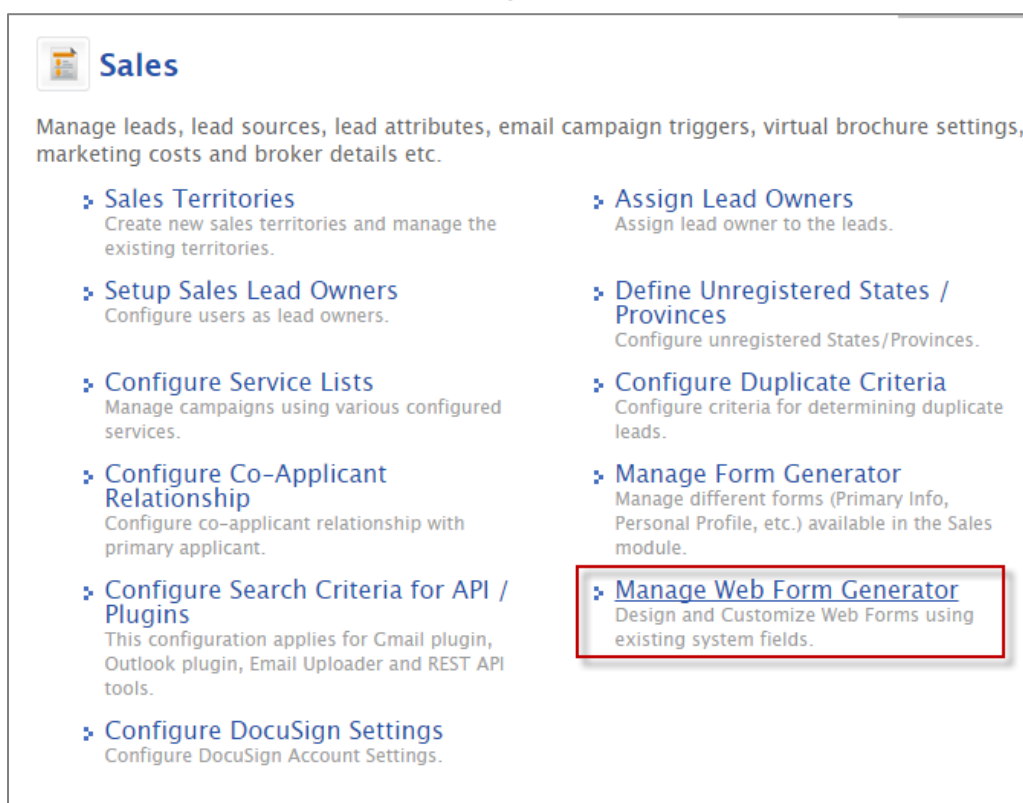
## Manage Web Form Generator

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**.







**Sales**

Manage leads, lead sources, lead attributes, email campaign triggers, virtual brochure settings, marketing costs and broker details etc.

- ❖ **Sales Territories**  
Create new sales territories and manage the existing territories.
- ❖ **Assign Lead Owners**  
Assign lead owner to the leads.
- ❖ **Setup Sales Lead Owners**  
Configure users as lead owners.
- ❖ **Define Unregistered States / Provinces**  
Configure unregistered States/Provinces.
- ❖ **Configure Service Lists**  
Manage campaigns using various configured services.
- ❖ **Configure Duplicate Criteria**  
Configure criteria for determining duplicate leads.
- ❖ **Configure Co-Applicant Relationship**  
Configure co-applicant relationship with primary applicant.
- ❖ **Manage Form Generator**  
Manage different forms (Primary Info, Personal Profile, etc.) available in the Sales module.
- ❖ **Configure Search Criteria for API / Plugins**  
This configuration applies for Gmail plugin, Outlook plugin, Email Uploader and REST API tools.
- ❖ **Manage Web Form Generator**  
Design and Customize Web Forms using existing system fields.
- ❖ **Configure DocuSign Settings**  
Configure DocuSign Account Settings.

- 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).





Web Forms | [Create New Form](#) Items 1 - 4 of 4

| Form Name                                     | Created By                | Form Format | # of Columns | Creation Date ▼     | Last Updated By           | Last Updated On     | Action  |
|---|---------------------------|-------------|--------------|---------------------|---------------------------|---------------------|---|
| <a href="#">Lead Personal Profile *</a>       | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 12:59 PM |  |
| <a href="#">Lead Qualification Details *</a>  | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 03:03 PM |  |
| <a href="#">Lead Web Page *</a>               | FranConnect Administrator | Single Page | 2            | 05/16/2017 05:08 PM | FranConnect Administrator | 05/16/2017 05:08 PM |  |
| <a href="#">Franchise Application Form **</a> | FranConnect Administrator | Multi Page  | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 01:05 PM |  |

[Back](#) [Print](#) [Export As Excel](#)

- Select **Copy URL**.

Web Forms | [Create New Form](#) Items 1 - 4 of 4

| Form Name                                     | Created By                | Form Format | # of Columns | Creation Date ▼     | Last Updated By           | Last Updated On     | Action  |
|---|---------------------------|-------------|--------------|---------------------|---------------------------|---------------------|---|
| <a href="#">Lead Personal Profile *</a>       | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 12:59 PM |    |
| <a href="#">Lead Qualification Details *</a>  | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 03:03 PM |    |
| <a href="#">Lead Web Page *</a>               | FranConnect Administrator | Single Page | 2            | 05/16/2017 05:08 PM | FranConnect Administrator | 05/16/2017 05:08 PM |   |
| <a href="#">Franchise Application Form **</a> | FranConnect Administrator | Multi Page  | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 01:05 PM |  |

[Back](#) [Print](#) [Export As Excel](#)

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

☒ 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/leadPersonalProfile.jsp?refLoc=ifrm' title='Lead Personal Profile'></iframe>
```

[Close](#)



- Copy the IFrame Embed Code from the text box.

☒ 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://ginnerbreadtraining.franconnect.net/fr/leadPersonalProfile.jsp?refL'
```

Copy Ctrl+C

Search Secure Search for "<iframe frameborder='0' width='100%' height='500'..."

Print... Ctrl+P

Inspect Ctrl+Shift+I

Close

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

## To Hyperlink a Web form

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

**Sales**

Manage leads, lead sources, lead attributes, email campaign triggers, virtual brochure settings, marketing costs and broker details etc.

- **Sales Territories**  
Create new sales territories and manage the existing territories.
- **Assign Lead Owners**  
Assign lead owner to the leads.
- **Setup Sales Lead Owners**  
Configure users as lead owners.
- **Define Unregistered States / Provinces**  
Configure unregistered States/Provinces.
- **Configure Service Lists**  
Manage campaigns using various configured services.
- **Configure Duplicate Criteria**  
Configure criteria for determining duplicate leads.
- **Configure Co-Applicant Relationship**  
Configure co-applicant relationship with primary applicant.
- **Manage Form Generator**  
Manage different forms (Primary Info, Personal Profile, etc.) available in the Sales module.
- **Configure Search Criteria for API / Plugins**  
This configuration applies for Email plugin, Outlook plugin, Email Uploader and REST API tools.
- **Manage Web Form Generator**  
Design and Customize Web Forms using existing system fields.
- **Configure DocuSign Settings**  
Configure DocuSign Account Settings.

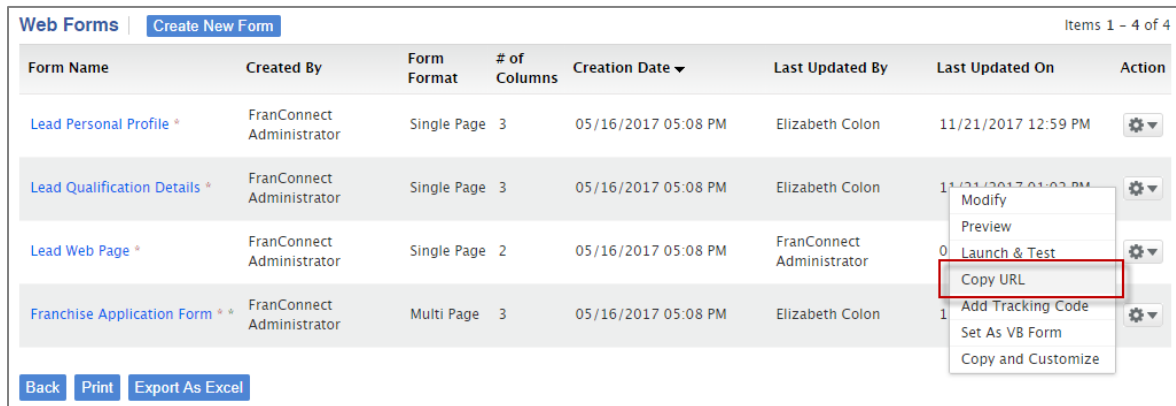
- Click the Action wheel to the right of the web form you want to hyperlink (You can select Preview to be sure the form meets your expectations for embedding, if not see Editing Web forms).

**Web Forms** [Create New Form](#) Items 1 - 4 of 4

| Form Name                                      | Created By                | Form Format | # of Columns | Creation Date ▼     | Last Updated By           | Last Updated On     | Action  |
|--|---------------------------|-------------|--------------|---------------------|---------------------------|---------------------|---|
| <a href="#">Lead Personal Profile *</a>        | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 12:50 PM | <ul style="list-style-type: none"> <li>Modify</li> <li>Preview</li> <li>Launch &amp; Test</li> <li>Copy URL</li> <li>Add Tracking Code</li> <li>Set As VB Form</li> <li>Copy and Customize</li> </ul> |
| <a href="#">Lead Qualification Details *</a>   | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 01:03 PM |   |
| <a href="#">Lead Web Page *</a>                | FranConnect Administrator | Single Page | 2            | 05/16/2017 05:08 PM | FranConnect Administrator | 05/16/2017 05:08 PM |   |
| <a href="#">Franchise Application Form * *</a> | FranConnect Administrator | Multi Page  | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 01:03 PM |   |

[Back](#)
[Print](#)
[Export As Excel](#)

3. Select **Copy URL**.

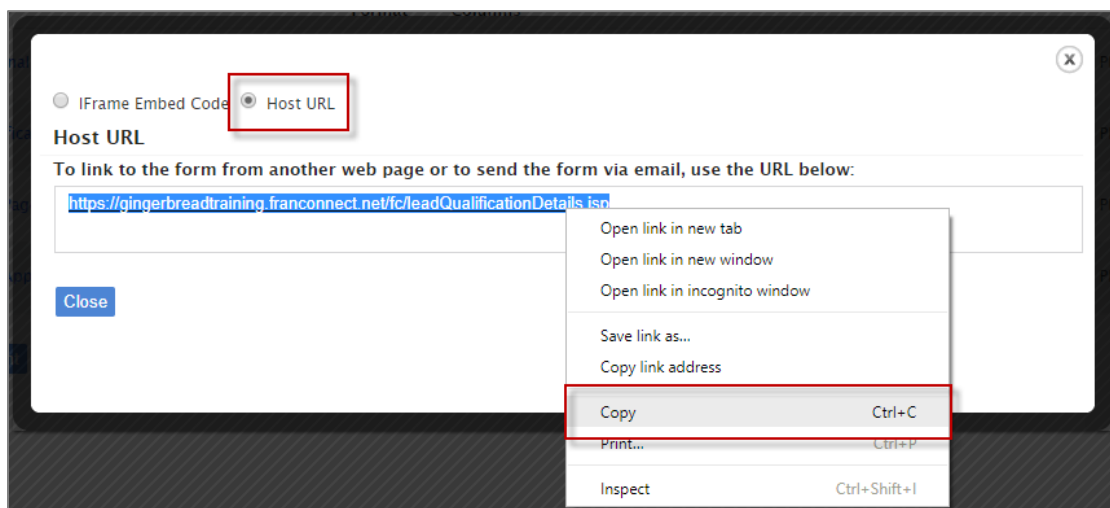


| Form Name                    | Created By                | Form Format | # of Columns | Creation Date       | Last Updated By           | Last Updated On     | Action            |
|------------------------------|---------------------------|-------------|--------------|---------------------|---------------------------|---------------------|-------------------|
| Lead Personal Profile *      | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 12:59 PM | [Settings]        |
| Lead Qualification Details * | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 03:03 PM | [Settings] [Menu] |
| Lead Web Page *              | FranConnect Administrator | Single Page | 2            | 05/16/2017 05:08 PM | FranConnect Administrator | 05/16/2017 05:08 PM | [Settings]        |
| Franchise Application Form * | FranConnect Administrator | Multi Page  | 3            | 05/16/2017 05:08 PM | Elizabeth Colon           | 11/21/2017 03:03 PM | [Settings]        |

Back Print Export As Excel

Context Menu for 'Lead Qualification Details':  
Modify  
Preview  
Launch & Test  
Copy URL  
Add Tracking Code  
Set As VB Form  
Copy and Customize

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

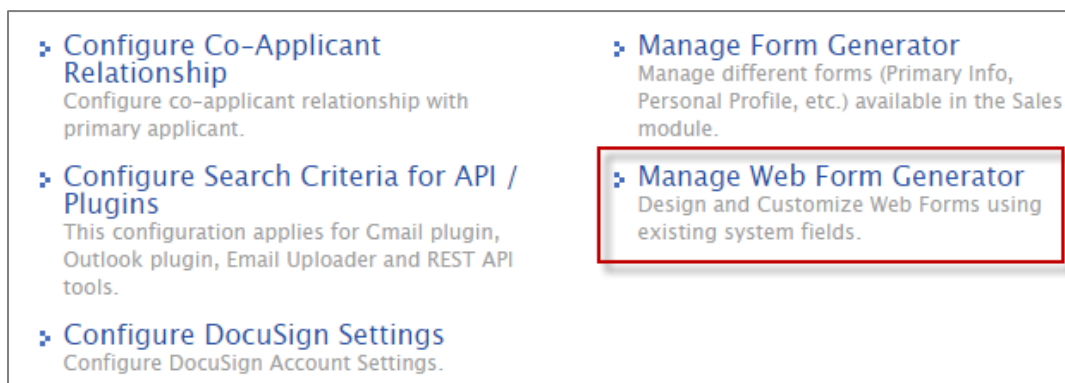


5. Paste into your document as a URL or paste into a Campaign.

## 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**.



- ❖ **Configure Co-Applicant Relationship**  
Configure co-applicant relationship with primary applicant.
- ❖ **Configure Search Criteria for API / Plugins**  
This configuration applies for Gmail plugin, Outlook plugin, Email Uploader and REST API tools.
- ❖ **Configure DocuSign Settings**  
Configure DocuSign Account Settings.
- ❖ **Manage Form Generator**  
Manage different forms (Primary Info, Personal Profile, etc.) available in the Sales module.
- ❖ **Manage Web Form Generator**  
Design and Customize Web Forms using existing system fields.

2. Click **Create New Form**.

| Web Forms                                    |                           | Create New Form |              | Items 1 - 4 of 4    |                 |                     |   |
|--|---------------------------|-----------------|--------------|---------------------|-----------------|---------------------|---|
| Form Name                                    | Created By                | Form Format     | # of Columns | Creation Date ▼     | Last Updated By | Last Updated On     | Action  |
| <a href="#">Lead Personal Profile *</a>      | FranConnect Administrator | Single Page     | 3            | 05/16/2017 05:08 PM | Elizabeth Colon | 11/21/2017 12:59 PM |  |
| <a href="#">Lead Qualification Details *</a> | FranConnect Administrator | Single Page     | 3            | 05/16/2017 05:08 PM | Elizabeth Colon | 11/21/2017 01:02 PM |  |

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).

Basic Details

\*Form Name :

\*Form Title :

☒ Display Form Title

Form Description :

Form Format : Single Page ▼

# of Columns : 1 ▼

Default Field Label Alignment : Left ▼

Form Language : English ▼

iframe Width : 100%

iframe Height : 500

\*Form URL : <https://gingerbreadtraining.franconnect.net/fc/extforms/>

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

Save & Next

Cancel

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.

Example Form

Available Fields Form Settings

Form Tools

Primary Info

Qualification Details

Search fields...

Date Submission

Date

Gender

Present Address

How many years at this address ?

City

Country

State / Province

Zip / Postal Code

Work Phone

Double click to add header.

Double click or drag & drop to add text.

\*First Name :

\*Last Name :

\*Email :

Drop here.

Drop here.

Double click to add footer.

Previous Save & Next Cancel

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."

Example Form

Available Fields Form Settings

Form Tools

Primary Info

Search fields...

Salutation

Address1

Address2

City

Country

State / Province

Zip / Postal Code

County

Best Time To Contact

Work Phone

Work Phone Extension

Double click to add header.

Double click or drag & drop to add text.

\*First Name :

\*Last Name :

\*Email :

Drop here.

Drop here.

Double click to add footer.

Previous Save & Next Cancel

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

The screenshot shows a form builder interface with a central workspace containing a lead capture form. The form is organized into sections: a header section with the text "Double click to add header.", a text section with "Double click or drag & drop to add text.", and a footer section with "Double click to add footer.". The main body of the form contains several input fields: "First Name" (with a red asterisk), "Last Name" (with a red asterisk), "Email" (with a red asterisk), "Mobile", "Address1", "Address2", "City", "State / Province" (a dropdown menu), "Zip / Postal Code", and "Country" (a dropdown menu). Below the input fields are two "Drop here." labels. The entire form is enclosed in a dashed border.

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

The screenshot shows the form builder interface with a sidebar on the left and a central workspace. The sidebar has a tab labeled "Form Settings" and a list of settings: "Field Label Settings", "Field Input Settings", "Text Settings", "Section Settings", "Form Settings", and "Button Settings". The central workspace has a header section with the text "Double click to add header.". In the top right corner of the workspace, there is a red-bordered button labeled "Add Section" and a blue-bordered button labeled "Save & Preview".

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

The screenshot shows the form builder interface with a sidebar on the left and a central workspace. The sidebar has a tab labeled "Form Settings" and a list of settings: "Field Label Settings", "Field Input Settings", "Text Settings", "Section Settings", "Form Settings", and "Button Settings". The central workspace has a header section with the text "Double click to add header.", a text section with "Double click or drag & drop to add text.", and a main body with input fields: "First Name" (with a red asterisk), "Last Name" (with a red asterisk), "Email" (with a red asterisk), "Mobile", "Address1", "Address2", "City", and "State / Province" (a dropdown menu). A red-bordered box with a white '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.

The screenshot shows the 'Field Label Settings' panel on the left and a form layout on the right. The panel includes options for Font Name (Comic Sans MS), Font Size (12), Font Style (B, I, U), Font Color (#3C3C3C), and Background Color. The form layout on the right has a header area, a text area, and four input fields labeled '\*First Name :', '\*Last Name :', '\*Email :', and 'Mobile :'. The labels are highlighted with red boxes.

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

The screenshot shows the 'Field Input Settings' panel on the left and the same form layout on the right. The panel includes options for Font Name (Georgia), Font Size (12), Font Style (B, I, U), Font Color (#3C3C3C), and Background Color (#7f7f7f). The form layout on the right has the same four input fields. The input fields are highlighted with red boxes.

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

The screenshot shows the 'Text Settings' panel on the left and a form layout on the right. The panel includes options for Font Name (Impact), Font Size (18), Font Style (B, I, U), Font Color (#003399), and Background Color (ffff00). The form layout on the right has a header area, a text area, and four input fields labeled '\*First Name :', '\*Last Name :', '\*Email :', and 'Mobile :'. The text area is highlighted with a red box, and the header area is highlighted with a yellow box.

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

The screenshot shows the 'Section Settings' panel on the left and a form preview on the right. The 'Section Settings' panel includes options for Font Name (Tahoma), Font Size (36), Font Style (Bold, Italic, Underline), Font Color (#3C3C3C), and Background Color (#F6F6F6). The form preview shows a header area with the text 'Section Setting Example' highlighted in a red box, and a text area with the text 'Text' highlighted in a yellow box.

- 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.

The screenshot shows the 'Form Settings' panel. It includes options for Background Color (#ffffff), Background Image (none), Display Logo (Yes/No), and Page Background Color (#dddddd).

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

The screenshot shows the 'Button Settings' panel on the left and a form preview on the right. The 'Button Settings' panel includes options for Button Alignment (Left), Font Name (Sans), Font Size (14), Font Style (Bold, Italic, Underline), Font Color (FFFFFF), and Button Color (7f00ff). The form preview shows a header area with the text 'Section Setting Example' highlighted in a red box, and a text area with the text 'Text' highlighted in a yellow box. The form also includes input fields for First Name, Email, Address1, City, and Zip / Postal Code, and buttons for Submit and Reset.

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

The screenshot shows the top navigation bar of the form editor with four steps: 1. Details (checked), 2. Design (checked), 3. Settings, and 4. Confirmation. Below the navigation bar, there's a section titled 'Example Form' with a 'Save & Preview' button highlighted in a red box. To the left of the main form area, there's a sidebar with 'Available Fields' and 'Form Settings' (expanded to show 'Field Label Settings' and 'Field Input Settings'). The main form area has a header section with the text 'Double click to add header.'

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

The screenshot shows a preview of a form with fields for 'City', 'State / Province', 'Zip / Postal Code', and 'Country'. Below these are two 'Drop here.' sections and a 'Double click to add footer.' section. At the bottom, there are three buttons: 'Previous', 'Save & Next' (highlighted with 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 'Preview Form' button in the top right. Below the button, there's a section titled 'Default values for Fields' with several dropdown menus: 'Lead Status' (Select Status), 'Lead Owner' (Select, Based on Assignment Rules), 'Campaign Name' (Select), 'Lead Source Category' (Select), and 'Lead Source Details' (Select Source Details). A note at the bottom right says 'Fields marked with \* are mandatory.'

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.

The screenshot shows the 'Confirmation' page with two radio buttons: 'IFrame Embed Code' (selected and highlighted with a red box) and 'Host URL'. Below the radio buttons, there's a section titled 'IFrame Embed Code' with the text 'To embed this form on your webpage, stream or blog post using an iFrame, copy and paste the code below:' and a code block containing the iFrame code: `<iframe frameborder='0' width='100%' height='500' src='https://gingerbreadtraining.franconnect.net/fc/extforms/exampleform?refLoc=iframe' title='Example Form'></iframe>`. At the bottom, there are two buttons: 'Previous' and '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>

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.

Web Forms [Create New Form](#) \*Indicates Virtual Brochure Web Form Items 1 - 5 of 5

| Form Name                                    | Created By                | Form Format | # of Columns | Creation Date ▼     | Last Updated By | Last Updated On     | Action  |
|--|---------------------------|-------------|--------------|---------------------|-----------------|---------------------|---|
| <a href="#">Example Form</a>                 | Elizabeth Colon           | Single Page | 2            | 01/15/2018 12:46 PM | Elizabeth Colon | 01/15/2018 02:53 PM | <input checked="" type="button" value="Modify"/>  |
| <a href="#">Lead Personal Profile *</a>      | FranConnect Administrator | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon | 11/2/2017 05:08 PM  | <input type="button" value="Preview"/><br><input type="button" value="Launch &amp; Test"/><br><input type="button" value="Copy URL"/> |
| <a href="#">Lead Qualification Details *</a> | FranConnect               | Single Page | 3            | 05/16/2017 05:08 PM | Elizabeth Colon | 11/2/2017 05:08 PM  | <input type="button" value="Preview"/><br><input type="button" value="Launch &amp; Test"/><br><input type="button" value="Copy URL"/> |

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).

Basic Details

\*Form Name : Example Form

\*Form Title : Example Form

☒ Display Form Title

Form Description : This form is used as an example

Form Format : Single Page

# of Columns : 2

Default Field Label Alignment : Left

Form Language : English

iframe Width : 100%

iframe Height : 500

\*Form URL : https://gingerbreadtraining.franconnect.net/fc/extforms/exampleform

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

Save & Next

Cancel

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.

Available Fields

Form Settings

Field Label Settings

Field Input Settings

Text Settings

Section Settings

Form Settings

Button Settings

Double click to add header.

Double click or drag & drop to add text.

\*First Name :

\*Last Name :

\*Email :

Mobile :

Address1 :

Address2 :

City :

State / Province : Select

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

The screenshot shows the 'Example Form' configuration page. On the left, there's a sidebar with 'Available Fields' and 'Form Settings' tabs. Under 'Form Settings', there are sub-tabs for Field Label Settings, Field Input Settings, Text Settings, Section Settings, Form Settings, and Button Settings. The main area displays a form layout with various input fields and sections. The 'Save & Preview' button is highlighted in red at the top right. At the bottom, there are buttons for 'Previous', 'Save & Next', and 'Cancel'.

- 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 'Example Form'. At the top, there's a progress bar with four steps: Details, Design, Settings (current), and Confirmation. The 'Preview Form' button is at the top right. Below the progress bar, there's a section for 'Default values for Fields' with dropdowns for Lead Status (New Lead), Lead Owner (Select), Campaign Name (Select), Lead Source Category (Select), and Lead Source Details (Select Source Details). There's also a checkbox for 'Based on Assignment Rules'. Below this is the 'After Submission' section with radio buttons for 'Confirmation Message' (selected) and 'Redirect URL'. A rich text editor is shown with the message: 'Thank you for submitting your information, we will get back to you shortly.'

- 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.

☒ 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](#)

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.

Admin > Info Mgr > Configure Info Mgr Tabs

Tabs marked with \* cannot be disabled as some of its fields are associated with some Custom Reports, Workflow

| <input type="checkbox"/> Name                               | Module Name | Sub Module Name |
|---|-------------|-----------------|
| <input checked="" type="checkbox"/> Addresses               | Info Mgr    | Franchisee      |
| <input checked="" type="checkbox"/> Agreement*              | Info Mgr    | Franchisee      |
| <input checked="" type="checkbox"/> Center Info             | Info Mgr    | Franchisee      |
| <input checked="" type="checkbox"/> Contact History         | Info Mgr    | Franchisee      |
| <input checked="" type="checkbox"/> Contract Signing*       | Info Mgr    | Franchisee      |
| <input checked="" type="checkbox"/> Customer Complaints*    | Info Mgr    | Franchisee      |
| <input checked="" type="checkbox"/> Default and Termination | Info Mgr    | Franchisee      |

## 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.

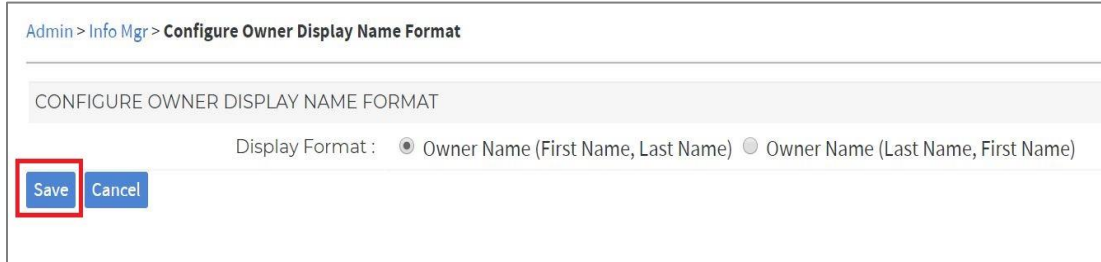
4. Click **Configure** to save

The screenshot shows the 'Configure Web Form Approval Process' interface. At the top, the breadcrumb trail is 'Admin > Info Mgr > Configure Web Form Approval'. The main heading is 'CONFIGURE WEB FORM APPROVAL PROCESS'. Below this, there are two radio button options: 'Enable Approval Process' with 'Yes' selected (indicated by a red arrow) and 'No' unselected; and 'Send Email Notification' with 'Yes' selected and 'No' unselected. Below these are input fields for '\*To:' (containing 'monica.fitchett@francoconnect.com'), 'CC:', and '\*Email Subject:' (containing 'New Web Form Approval Request'). A rich text editor is shown with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options. The text area contains the message 'A New Web Form has been submitted for Approval'. At the bottom left, there are two buttons: 'Configure' (highlighted with a red box) and 'Cancel'.

## 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**

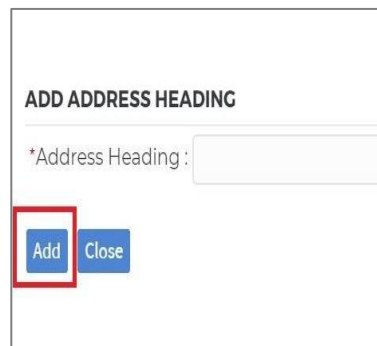
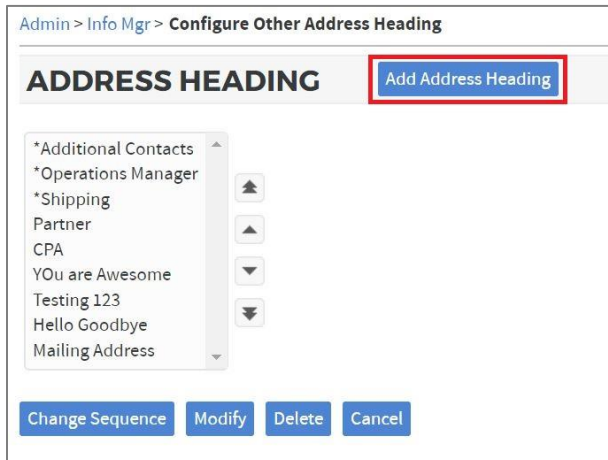


## Configure Other Address Heading

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

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.

The left screenshot shows the 'CONFIGURE FORM LEVEL TRIGGERS AND AUDITING' page. It has a table with columns 'Form Name', 'Enable Audit', and 'Trigger Alert Email Recipient(s)\*\*'. Forms listed include Agreement, Contract Signing, Customer Complaints, and Default and Termination. A dropdown menu is open for the 'Trigger Alert Email Recipient(s)\*\*' column, showing a search bar and a list of users: A Figueroa, a student1, a student10, and a student12.

The right screenshot shows the 'Triggers' section. It has two columns: 'Additional Recipient(s)\*\*' and 'On Event'. The 'Additional Recipient(s)\*\*' column has a dropdown menu with options: Select, Add / Modify, and Delete. The 'On Event' column has a dropdown menu with options: Select, Add / Modify, and Delete.

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

The screenshot shows the 'CONFIGURE FORM LEVEL TRIGGERS AND AUDITING' page. The 'Configure Form Level Triggers Alert Email' button is highlighted with a red box. The page has a table with columns 'Form Name', 'Enable Audit', and 'Trigger Alert Email Recipient(s)\*\*'. Forms listed include Agreement and Contract Signing. The 'Trigger Alert Email Recipient(s)\*\*' column has a dropdown menu with options: Select, Add / Modify, and Delete.

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

The left screenshot shows the 'CONFIGURE FORM LEVEL TRIGGERS ALERT EMAIL' page. It has a subject line and an email content editor. The subject line is 'Store Info Changed'. The email content editor has a menu bar with options: File, Edit, View, Insert, Format, Tools, Table. The email content is: 'For Franchise ID: \$FRANCHISE\_ID\$ Please check the \$FORM\_NAME\$ section'.

The right screenshot shows the 'Email Fields' dropdown menu. It has a search bar and a list of options: Select All, Center Name, Center Contact Name, Center Street Address, Center City, Center State, and Center Country.



## 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**

unsubscribe'. The left sidebar shows 'Opt-Out Disclaimer:'. The bottom has 'Save' and 'Cancel' buttons."/>

Admin > Info Mgr > **Configure Opt-out Disclaimer**

CONFIGURE OPT-OUT DISCLAIMER (OPT-OUT DISCLAIMER WILL BE DISPLAYED AT THE BOTTOM OF THE CAMPAIGN EMAILS)

File Edit View Insert Format Tools Table

Formats Verdana 11pt B I U A A

Opt-Out Disclaimer:

If you'd like to opt-out of our email list, please click [unsubscribe](#)

Save Cancel

## 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**

Admin > Info Mgr > Configure Ownership Transfer Status

**Note :**  
This allows you to configure each step associated with transferring ownership from one owner to another.

**OWNERSHIP TRANSFER STATUS DETAILS** **Add Ownership Transfer Status**

- \*Documentation Received
- Financial Details Received
- Initial Documentation Sent
- Other
- Pending
- Discovery Process
- \*Transfer Complete

Change Status Sequence Modify Delete Cancel

**ADD TRANSFER CURRENT STATUS**

\*Transfer Current Status :

**Add** **Close**

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**

Admin > Info Mgr > Configure Location Deactivation Reason

**Note :**  
This allows you to configure reasons behind deactivation of the location.

**LOCATION DEACTIVATION REASON DETAILS** **Add Location Deactivation Reason**

- \*Non-Payment
- \*Expiration/Non-Renewal
- \*Other
- \*Mutual Termination
- \*Abandonment

Change Status Sequence Modify Delete Cancel

**ADD LOCATION DEACTIVATION REASON**

\*Location Deactivation Reason :

**Add** **Close**

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**

Admin > Info Mgr > Manage SmartConnect > Master To-Do List

### MASTER TO-DO LIST

[Add New To-Do](#)

| To-Do Name                         | Description                          |
|------------------------------------|--------------------------------------|
| testing                            | test                                 |
| Check you renewal status           | by end of quarter                    |
| Submit Sales Report                | This task lets you to enter the requ |
| Review Monthly Sales Performance   | For a particular selected month, yo  |
| Review Quarterly Sales Performance | For a particular selected quarter, y |
| Setup Goals for Quarter            | This task allows you to set up the g |
| Setup Goals for the Year           | This task allows you to set up the g |

[Print](#) [Cancel](#)

### ADD TO-DO LIST

\*Subject :

\*Description :

Attachment : [Choose File](#) No file chosen

Web URL :

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

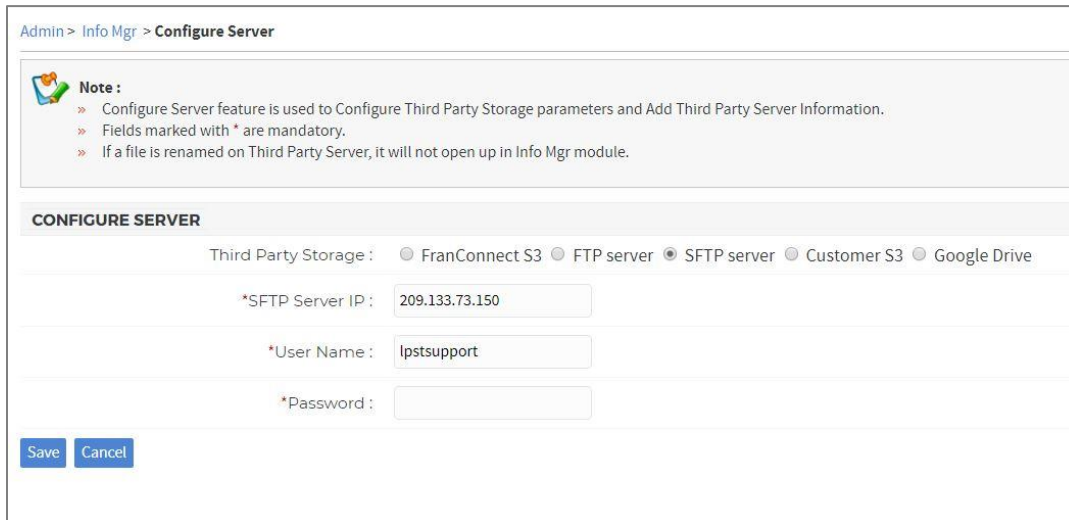
## Integrations

### 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**



The screenshot shows a web interface for configuring a server. At the top, a breadcrumb trail reads 'Admin > Info Mgr > Configure Server'. Below this is a 'Note' section with a green icon and text: 'Configure Server feature is used to Configure Third Party Storage parameters and Add Third Party Server Information. Fields marked with \* are mandatory. If a file is renamed on Third Party Server, it will not open up in Info Mgr module.' The main section is titled 'CONFIGURE SERVER'. It contains a 'Third Party Storage' section with radio buttons for 'FranConnect S3', 'FTP server', 'SFTP server' (which is selected), 'Customer S3', and 'Google Drive'. Below this are three input fields: '\*SFTP Server IP' with the value '209.133.73.150', '\*User Name' with the value 'lpstsupport', and '\*Password' which is empty. At the bottom left are 'Save' and 'Cancel' buttons.

### 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**

Admin > Info Mgr > **Configure Email Capture**

**Note :**

- » This section allows to Configure Email server and Email information.
- » User needs to use this email in Cc, while sending emails to franchisees, so that System v

**CONFIGURE EMAIL CAPTURE**

\*POP Server :

\*Email :

\*Password :

\*Confirm Password :

## 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**

Admin > Info Mgr > **Configure Search Criteria for API / Plugins**

**Note :**

- » This configuration applies for Gmail plugin, Outlook plugin, Email Uploader and REST API tools.
- » System will search for records matching any of the below criteria.
- » System will search for records across below selected record types. If you want to search just for records of the same tab

**SELECT RECORD TYPE**

☒ Active Franchisee  
☐ Corporate Location  
☐ Terminated Franchisee  
☐ In Development

**SET CRITERIA** ( SYSTEM WILL SEARCH FOR RECORDS MATCHING ANY OF THE BELOW CRITERIA )

| Field Name                     | Criteria                    |
|--------------------------------|-----------------------------|
| * Franchise ID (Center Info) ▼ | Contains any of the words ▼ |
| * Owner Name (Owners) ▼        | Contains any of the words ▼ |
| * Office name (Center Info) ▼  | Equals ▼                    |
| * Email (Center Info) ▼        | Equals ▼                    |
| * Email (Owners) ▼             | Equals ▼                    |

**SET CRITERIA** ( SYSTEM WILL SEARCH FOR RECORDS MATCHING ANY OF THE BELOW CRITERIA )

Field Name

\* Franchise ID (Center Info) ▼

\* Owner Name (Owners) ▼

Select

Franchise ID (Center Info)

**Owner Name (Owners)**

Office name (Center Info)

Name (Entity Details)

Email (Center Info)

Email (Owners)