FRANCHISE LOGINS New franchises first login to the support area: www.xxxx.com/support ...this filters their entry path. Each office has only one login, they then click the software link from within the support area to access their software account.

BLOG The support center has a blog section for company news. If you log into the CMS, the blog then allows you to add posts from the front end.

FRANCHISE/OFFICE ACCOUNT CREATION

STEP 1. CREATE A NEW ACCOUNT: You can create new franchises via the Control Panel > ACCOUNT MANAGER - **PASS**

STEP 2. CREATE A DIRECTORY RECORD: You then need to copy and paste the client key that is generated and place in the client key field. This how it tells the system which account the office is related to. **The Client key is coming up automatically in the “Client Key” field.**

STEP 3. Choose the category called "Franchises" **Already selected as franchises**

STEP 4. Complete the office information and custom fields, as this is displayed on the website. **(DONE)**

STANDARD EMAIL: It may be a good idea to setup an email template for your new offices, containing links and passwords. **Added one as a email template**

LIBRARY you have your own library of templates found in: Control Panel > Manage Templates > Add template from library (**does it allow you to modify the templates) Default standard library (CHECKED ITS through adding a test template)**

SHARED DIRECTORY RECORDS When creating branches, you can share contacts from your directory (they will be added by default in the new account). To share a contact, enable the "Shared contact" checkbox. **Create a contact in the directory in the head office account you should be able to specify whether it’s shared record or not. (Permission Denied) Will check this with Montana tomorrow**

NEW APPLICANT REGISTRATIONS Applicants registering via the website gets added to the CMS > Modules > Applicant franchise registration (add a shortcut to make it easier to find). From there you can re-assign the applicant to a particular franchise depending on their territory. **Follow up Ricardo (Monday – Tuesday)**