### **Franchises/Centers Setup Pages**

Setup all the information and configurations for Franchises/Centers



Written By Scott Smith

Updated 2 years ago

The system provides the ability to manage the Franchises or Centers processes.

In the Franchises > Setup page, you have the ability to manage the setup for these processes. Based on the permissions, this page is available only for certain Business Accounts.

## **Franchise Statuses**

In the Franchises > Setup page, click on the “Manage Franchises Statuses” menu. On this page, you have the ability to manage the statuses for your process workflow. By default, the system provides some statuses but you can modify these statuses based on your business workflow.

Clicking on the “Add New” button will provide you the capability to add a new status with a color.

Clicking on the edit icon for any status provides the ability to update the status & its color. You can delete status by clicking on the delete icon and you can also drag a status row up or down to rearrange the order of the status.

## **Contact Form Setup - Franchises**

In the Franchises > Setup page, click on the “Contact Form Setup” menu. On this page, you have the ability to set up a Franchises Interest Contact form or Enquiry form. By default, some fields are added in the form and you have the ability to modify them or add new fields.

Click on the “Add New Field” button to add any field that is listed in the field list. Once you select an option then a popup opens to specify the attributes of the field.

For example, when you select a Text box option then it displays a popup in which, Field Name is the name of the field that has to be unique. Field Label is the text that will be displayed as Label for the Field in the form. Field Watermark is for information purposes to display a text as a watermark in the Text box fields. Field Description is to describe the field purpose and it is an optional field. Field Length is to specify if the field should cover the entire row or only half of it. “Is Required” is to specify if the field is required to be answered. When it is selected then Field Error Message appears to specify the error message text.

Along with the option to edit a field, you can enable or disable certain fields to set if they have to show in the form or not.

Clicking on the Preview button will provide the ability to preview the form with the fields that are added or updated.

The “Contact enrollment URL” link in the page provides the link to this form that you can add on your website or you can embed the form on your website using a script. Click on the “Generate Embedded Script” button and copy the code to paste and embed the form in your website code.

Any user that enters information in the form on your website or in the link and submits, will be added into the Franchises > Contacts page.

## **Enrollment Form Setup - Franchises**

The system provides the ability to set up an Enrollment form for the Franchisees to enroll & start a new Franchise or Center.

In the Franchises > Setup page, click on the “Enrollment Form Setup” menu. On this page, some sections and fields within the sections are displayed by default.

Click on the “Add Section” button to add a new section to the form. You have the ability to disable and edit the default sections and any new sections the user adds. You will not be able to disable the Personal Details section. You have the ability to delete the sections that the user adds.

Clicking on “Expand All” or “Collapse All” will expand or collapse the sections. You have the ability to re-order the sections and the fields within the sections.

For each section, when you click on the plus (+) icon, it will open a popover with the list of Fields that can be added to the section. Selecting any Field option in the popover will provide the ability to specify the field properties. For example, when you select a Text box option then it displays a popup in which, Field Name is the name of the field that has to be unique perform. Field Label is the text that will be displayed as Label for the Field in the form. Field Watermark is for information purposes to display a text as a watermark in the Text box fields. Field Description is to describe the field purpose and it is an optional field. Field Length is to specify if the field should cover the entire row or only half of it. “Is Required” is to specify if the field is required to be answered. When it is selected then Field Error Message appears to specify the error message text.

You have the ability to edit or disable or delete the default fields depending on the field type. You can delete the fields that are added by the user.

Clicking on the Preview button will provide the ability to preview the form with the fields that are added or updated.

The “Franchise/Center enrollment registration URL” link in the page provides the link to this form that you can add on your website or you can embed the form on your website using a script or send in an email to the Franchisees. Click on the “Generate Embedded Script” button and copy the code to paste and embed the form in your website code.

Any user that enters information in the form on your website or in the link and submits, will be added into the Franchises > Franchise Enrollments page.

## **On-Boarding - Franchises**

The system provides the ability to create a check-list to on-board the Franchises or even for the continuous process engagement.

In the Franchises > Setup page, click on the “On-Boarding” page. On this page, some checklist items are added by default but you have the ability to add a new On-boarding checklist item or edit or delete existing items.

You also have the ability to reorder the items.

The Checklist items are shown for each Franchise and as they mark them as complete, they will be shown in Franchises > On-boarding page for all the franchises to the Business accounts based on the permissions.

## **Agreements - Franchises**

The system provides the ability to store & manage Agreements or documents related to Agreements.

In the Franchises > Setup page, click on the Agreements page. On this page, all the agreements that are added by the user are displayed.

Click on the “Add New” button to add new agreements. In the popup, you have the following fields to provide the information -

Title to specify the Agreement name, Tags to add any tag for the Agreement, Status is not required to be answered in the Setup but should be used in the Franchises > Agreements page to mark the status of the agreement for a Franchise. The visibility field is used to set the visibility of the Agreement based on the Franchise status. Example - If you want the Agreement to be visible only to the Franchises that are in “Enrollment Pre-approved” status and above then if there is a Franchise that is in “Enrollment in Progress” then it would not be able to view the Agreement. The description field provides the ability to specify the details of the Agreement. In Discussion, any comments or discussion can happen regarding the agreement or related documents. You also have the ability to add In-line Videos and In-line images in the editor to make it a rich text content.

In the Attachments tab, you have the ability to add and manage Attachments. Clicking on “Add Attachments” will open a popover to add Attachment from different sources like Computer, Dropbox or Google Drive. If you select Google Drive, you will have 2 options. 1) You can add the Google Drive document link and 2) You can upload the document from Google Drive into the System. For the 1st option, any update made to the Google Drive document will reflect the changes here. If the link changes in Google Drive then you will no longer be able to access from here. For the 2nd option, any update made to the Google Drive document will not reflect the changes here because the file is uploaded to this system.

Once the attachments are added, you have the ability to download, delete or view the documents. The Viewer provides the capability to view the documents without the need to download them. However, there might be some files that you can’t view.

Clicking on “Manage Statuses” will open a popup to Add New Statuses with a color for the Agreements. You can Edit or Delete existing Statuses. You also have the ability to reorder the statuses.

The created Agreements are shown for each Franchise and will be shown in Franchises > On-boarding page for all the franchises to the Business accounts based on the permissions.

## **Inventory - Franchises**

The system provides the ability to set up the Inventory for the Franchises to purchase them.

In the Franchises > Setup page, click on the “Inventory” menu. On this page, all the inventories for different categories are listed. The categories are listed as Tabs and inventories for each category are displayed in the corresponding tabs.

Click on the “Add New” button to add a new Inventory. In the popup, you have the ability to add the details of the Inventory.

In the Title, you can specify the name of the inventory. In the Tag field, you have the ability to Tag it with any specific information. The Status field is disabled during Setup but will be enabled for the Inventories in the Franchises > Inventory page. In the Category field, you have the ability to specify the available category. You also have the ability to add/edit/delete the categories by clicking on the Manage button. You have the ability to specify the Available inventory quantity in the Inventories field. You have the ability to specify the Inventory cost per item in the Inventory Cost field. The Sold & Available fields are disabled but will be filled with the information as the inventories are ordered. The inventory description and details can be provided in the description field. Any Inventory related discussion can happen in the Discussion tab. This discussion can happen between the Business and Franchise to communicate about the inventory. You have the ability to add any attachments to the inventory in the Attachments tab.

The added inventory will be listed in the grid where you have the ability to edit or delete the inventory.

## **Documents - Franchises**

The system provides the ability to manage and share the documents with the Franchises/Centers for adding, viewing, downloading or just print only based on the permissions.

In the Franchises > Setup page, click on the “Documents” menu on the left side section. You have the ability to create multiple folders or subfolders. Right-click on the Documents root node to create a new folder and enter the text to name the folder. If you right-click on the folder, you have the ability to create a new folder or new subfolder. You also have the ability to rename or delete the folder & its content.

When you click on any folder then you will have the ability to add documents by clicking on “Add Attachments” or “Add Code Files”. When you add Code files, the files can be viewed in the Code viewer with the code syntax colors (most of the code files are supported with this viewer). For General Attachments, the files can be viewed in the general viewer based on the file type. Example - Video files can be played in the viewer. Work documents can be viewed in a document viewer.

When you click on “Add Attachment” or “Add Code File” buttons, you will see the option to upload the documents from the Computer or Dropbox or Google Drive. There are 2 options for Google Drive file upload - “Add Attachment Link” and “Upload to the System”.

Clicking on “Upload to the System” will provide the ability to upload from the source (like Google Drive, Dropbox) to the System. With this option, it will not impact the attachment if the attachment changes in the source location.

Clicking on “Add Attachment Link” will provide the ability to just add the source (like Google Drive, Dropbox) attachment link. With this option, the changes made in the source attachment or source location will impact the attachment here.

Once you add an attachment, you will see the added attachment in a grid with the Attachment file name, Comments, Location, and Actions. The location will display from where the attachment is uploaded/added. You have the ability to download or view or delete the attachment in the Actions column.

Above the grid, on the right side, you have the ability to set the permissions on who can see the documents. Click on the view icon. In the popup, all the Franchise statuses are listed. You have the ability to set the permissions by selecting the statuses, which will allow only the Franchises/Centers that are in those statuses to view the documents in the folder. Example - If you select only “Franchise in Operation” status then it will allow only the Franchises that are in “Franchise In Operation” status to view the documents in the folder.

You have the ability to set the permissions to Print, View & Download based on the role. Click on the Print icon. In the popup, for each role, you have the ability to select View & Download or Print only or Both. Based on the set permissions, the user will have the ability to perform only those actions.

If you need assistance with the setup, book your one-on-one session: <https://calendly.com/calimatic/60min>

Contact us at hello@calimaticedtech.com for any questions.

### **Franchises/Centers Contacts Or Enquiries**

View or Manage Franchises/Centers Contacts or Enquiries



Written By Scott Smith

Updated 3 years ago

In the Franchises > Contacts page, you will be able to see all the Enquiries or Contacts that are filled in the Contact Form (via the Contact Form link or the Contact Form that is embedded in your website).

This page is visible only to the Business Account users based on the permissions.

You also have the ability to directly add any Contact by clicking on the “Add Contact” button. In the popup, you will be able to see the fields that are configured in the Franchises > Setup > Contact Form Setup. When you fill the form and create a Contact then it is added to the grid.

In the grid, the Contact Name, Email, Phone, State and First Choice of City information is visible along with the information on who is selected to Start a Franchise/Center. In the “Selected to Start Franchise” column, you can use the switch to mark a Franchise as selected or not-selected to specify your selection. When you hover on the row, you will see Action icons & buttons.

“Convert to Lead” option provides the ability to Covert the contact into a Lead if you do not want to select for the Franchise but want to keep it in the Lead file.

“Send Franchise Enrollment Form” option provides the ability to Send the Franchise Enrollment Form to the Contact Email that is specified in the contact form. When you click on the button, it will send an email with the Enrollment form link to fill and submit the Enrollment form.

Once the enrollment form is submitted then the Franchise will appear in the Franchises > Franchise Enrollments page.

Contact us at lcmcoach@calimatic.com for any questions.

### **Franchises/Centers Enrollments**

View or Manage Franchises/Centers Enrollments



Written By Scott Smith

Updated 3 years ago

All the Franchises that have submitted their enrollment form or that are directly added here will be displayed on the page.

Clicking the “Add Franchise” button will provide the ability to add a Franchise to the system. When you click on the button, a popup opens and in it, you can specify the details of the Franchise and its primary contact details.

You also have the ability to send the portal access by clicking on the “Send Portal Access” button after you create a Franchise.

In the page grid, the Franchise name, status and primary contact information is displayed. In the Action column, you can edit/view the Enrollment details by clicking on the “Enrollment” button. You also have the ability to edit or delete the franchise. You have the ability to change the Status of the Franchise in the Status column.

Note the Franchise account users can only view their Franchise information in the grid. They can’t add Franchise or delete the Franchise or change the status of the Franchise. However, they can edit their Franchise enrollment information.

Contact us at lcmcoach@calimatic.com for any questions.

### **Franchises/Centers Board**

View or Manage Franchises/Centers in Boards



Written By Scott Smith

Updated 3 years ago

All the Franchises that have submitted their enrollment form or that are directly added here or in the Franchise Enrollments page will be displayed on the page.

Clicking the “Add Franchise” button will provide the ability to add a Franchise to the system. When you click on the button, a popup opens and in it, you can specify the details of the Franchise and its primary contact details.

You also have the ability to send the portal access by clicking on the “Send Portal Access” button after you create a Franchise.

Clicking on the “Manage Statuses” will provide the ability to add/edit/delete/order the Franchise statuses. In the popup, you have the ability to add Status by clicking on the “Add Status” button. When you click on the Edit icon for any row, you have the ability to update the Status name and color of the Status.

Hovering on the Status will provide the drag & drop icon which indicates that you can move the status row up or down to re-order as needed.

On the board, all the Franchises are displayed as Board cards in the corresponding Board columns based on their status. Based on your Statuses settings, the Board columns are displayed. Clicking on the Franchise name on the Board card will open the Franchise contact information popup.

Note that the Franchise account users can’t see the “Manage Statuses” and “Add Franchise” buttons.

Contact us at lcmcoach@calimatic.com for any questions.

### **Franchises/Centers Onboarding**

Managing the Onboarding Checklist



Written By Scott Smith

Updated 3 years ago

**For Business Accounts -**

All the Franchises are listed in a grid with “Completed Items” and “Remaining Items” columns which indicate how many checklist items have been completed by the Franchises to track their Onboarding progress. If you click on any Franchise then a popup opens with the Onboarding items checked or unchecked.

Business Account users can’t Check or Uncheck the items and they are for view the only purpose.

**For Franchise Accounts -**

The number of “Completed Items” and “Remaining Items” for the Franchise are displayed in the grid. You have the ability to check or uncheck the items to specify which items are completed.

Contact us at lcmcoach@calimatic.com for any questions.

### **Franchises/Centers Training**

Attend Training and Assessments



Written By Scott Smith

Updated 3 years ago

**For Business Accounts -**

All the Franchises are listed in a grid with their assigned Training & Assessments based on the Visibility settings. The status of the Training is displayed along with Tags. Clicking on the edit icon for each row would open a popup to view the content of the Training. In the Assessments column, you have the ability to view the Assessments content. Business Account users can’t edit the content of Training & Assessments on this page and they are for view the only purpose.

**For Franchise Accounts -**

The Training and Assignments for the Franchise are displayed along with the Status, Tags for the corresponding Training. The user has the ability to click on the edit icon to view the contents of the Training, change the status and discuss in the discussions tab. The user has the ability to attend the Assessment by clicking on the Evaluate button in the Assessments column.

Contact us at lcmcoach@calimatic.com for any questions.

### **Franchises/Centers Agreements**

View and Manage Franchise/Center Agreements



Written By Scott Smith

Updated 3 years ago

**For Business Accounts -**

All the Franchises are listed in a grid with their assigned Agreements based on the Visibility settings. The status of the Agreements is displayed along with Tags, number of Attachments and number of discussions per agreement. Clicking on the edit icon for each row would open a popup to view the content of the Agreements along with Attachments and Discussions. Business Account users can’t edit the content and they are for view the only purpose. However, discussions can happen.

**For Franchise Accounts -**

The Agreements for the Franchise are displayed along with the Status, Tags, number of Attachments, number of discussions for the corresponding agreement. The user has the ability to click on the edit icon to view the contents of the agreement, change the status and discuss in the discussions tab.

Contact us at lcmcoach@calimatic.com for any questions.

### **Franchises/Centers Documents**

View or Manage Franchises/Centers Documents



Written By Scott Smith

Updated 3 years ago

**For Business Accounts -**

All the Documents folders are displayed on the left side section. Clicking on the folders will display the corresponding documents on the right section based on the permissions set in the Franchises > Setup page.

On the right side section, the Franchises dropdown list provides the ability to filter by Franchise to view the assigned documents. In the grid, the following information is displayed -

Document name,

“Uploaded By” information on how uploaded the document (Business or Franchise user),

“Visible To” information indicates to whom the Document will be visible,

Comments of the Document,

Location information indicated from where the Document is uploaded from,

Actions are displayed based on the permissions set.

**For Franchise Accounts -**

All the Documents folders are displayed on the left side section. Clicking on the folders will display the corresponding documents in the right section based on the permissions. In the grid, the following information is displayed -

Document name,

“Uploaded By” information on how uploaded the document (Business or Franchise user),

“Visible To” information indicates to whom the Document will be visible,

Comments of the Document,

Location information indicated from where the Document is uploaded from,

Actions are displayed based on the permissions set.

If the Permission is set to Print only the documents then the user can only print the documents.

Contact us at lcmcoach@calimatic.com for any questions.

### **Billing Setup By Franchises/Centers**

Ability to add or manage Billing Information by the Franchises/Centers



Written By Scott Smith

Created one year ago

The system provides the ability to add the Billing Details like Bank Accounts by the Franchise Owners or Admins to pay for Inventory or Franchise Fees to the Company.

In order to add the Billing details, click on the Franchises menu and Billing sub-menu. In the billing page, you will have 2 sections - Franchises Billing Setup and All Transactions.

In the “Franchises Billing Setup” section, you will have the ability to manage your billing accounts. Click on the section to open it and click on the “Add Payment Details” button to add the billing details.

In the popup, enter your Name, Email and select the Payment method. Click on Continue and follow the steps as directed in the next screens to complete adding the Payment details.

Once the details are added then the billing account will be displayed in the section. “Primary Method of Payment” is enabled by default if only one account exists. If you add multiple accounts, you have the option to set any one of them as Primary.

You will not be able to edit the Payment due to security reasons but can remove and re-add it if any changes are needed.

In the “All Transactions” section, you will have the ability to view all the Inventory & Franchise Fees Transactions that were made to the Company from your billing accounts.

In the grid, you can view the details of the transactions. The Status columns show the status of the payment if it is successful, pending or unsuccessful. It takes around 5 days to show as successful depending on the Bank for the Bank account transactions. Clicking on the view icon for the Receipt URL will show you the payment receipt for the transaction.

### **Inventory Purchases By Franchises/Centers**

Ability to purchase inventory by the Franchises/Centers



Written By Scott Smith

Created one year ago

The system provides the ability to view the available Inventory and Order them.

To order the inventory, click on the Franchises menu and Inventory sub-menu. On the page, you will see the list of Inventory Categories as tabs if there are multiple Categories. Within each Tab, you will see “Order Inventory” and “Recent Orders” sections.

In the Order Inventory section, you will see the list of available inventories in the grid with Inventory name, the total available quantity for the inventory, Cost of each inventory item, Quantity added to the Cart, total cost added to the Cart, ability to add items to the cart, ability to view the details of the inventory, ability to discuss regarding the inventory and attachments regarding the inventory.

When the user clicks on “Add to Cart”, you have the ability to specify the quantity needed to purchase and add to the cart. Once you add to the cart then the total cost of the total items will be showing in the cart. Clicking on the “Update Cart” button will display the popup to update the quantity or remove the quantity from the cart.

In order to purchase the inventory, click on the Cart and confirm to pay for the inventory.

The amount will be deducted from the Primary Billing account that was added to the Franchises Billing page.

Note that you can purchase items only from one category at a time. If you need to purchase items from different categories then you will need to add items & purchase in each tab separately.

In the “Recent Orders” section, all the Inventory list that was previously purchased is displayed. In the grid, it displays the Inventory name, cost per inventory item, quantity added to the cart, total cost added to the cart, number of items that are Pending for Shipment, number of items that are Shipped, the ability to view details, discuss and view attachments of the inventory.

Clicking on the Transactions button will display a popup with all the transaction details of the inventory purchases. The Status columns show the status of the payment if it is successful, pending or unsuccessful. It takes around 5 days to show as successful depending on the Bank for the Bank account transactions.

Clicking on the view icon for the Receipt URL will show you the payment receipt for the transaction.

Clicking on the view icon for the Action column will show you the breakdown of the multiple items that were purchased as part of the transaction.

### **Franchises/Centers Setup & Management**

Setup & manage the system areas within the Franchise/Center Module



Written By Ivan Karmer

Updated one year ago

As Master Admin, you have the ability to configure the following areas for the Franchises/Centers to use:

**Status -** Used in the workflow to manage the processes

**Contact Forms -** Inquiry forms for franchises/centers

**Enrollment Form -** Application forms for potential students

**On-boarding -** Checklist to ensure each Franchise/Center has completed its onboarding process

**Agreements -** Set up, assign & manage Agreements with Franchises/Centers

**Inventory-** Inventory management

**Documents -** Configure & Manage all your documents that need to be shared with your Franchises/Centers. If your centers are paper-based centers, you can leverage the Print-Only secured feature to cut your shipping costs.

**Billing setup -** Configure billing to charge Franchise/Center Fees (You can read more about Billing Setup [here](https://help-lcm.calimatic.com/article?categoryId=6&solutionId=93))

Details of the above configurations can be found [here](https://help-lcm.calimatic.com/article?categoryId=6&solutionId=104).

Learn More about complete Franchise/Center Management [here](https://help-lcm.calimatic.com/article?categoryId=6).

If you need assistance with the setup, book your one-on-one session [here](https://calendly.com/calimatic/60min).

Contact us at hello@calimaticedtech.com for any questions.