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(bmp)

Business Management Portal

Enterprise portal, is a framework for integrating information, people and processes across organizational boundaries. It provides a single point of entry, often in the form of a web-based user interface, and is designed to aggregate information through application-specific portlets. ~wikipedia.org

<http://bmp.franserv.com>

Project Goals

- Easier Center Lookups
- Simpler Interface
- Consolidate all brand contacts
- Create a central point of contact mgt
- Network-wide reporting



Timeframe

- Project Concept: 3+ years
- Development: Q1-Q4 2007
- Release - THIS WEEK



Savings

8902 Contact Rpts per year for Sir Speedy
Potential Savings with new system:

178040 Seconds or

2967 Minutes or

50 Staff Hours per year!





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Logging In

Welcome

Enter your user name and password to log in now.

User name

demo@franserv.com

Password

••••••••

Forgot your password? [BMP Help](#)

Login



business management portal

Login Main Areas

1) **Username** : your *me@franserv.com* email address

2) **password** :

3) **forgot my password** : enter your username and click the "forgot my password" link

4) **bmp help** : click this link to download a Powerpoint presentation

Login

Forgot your password? [BMP Help](#)

••••••••

Password



Your Home Page

logged in as Demo Guest [set options](#) [LOGOUT](#)

(bmp)

Franchisee Lookup by Last Name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Advanced Search](#)

- MY TOOLS**
- Manage My Tools
 - 401K
 - Search Contacts
- Calendars**
- My Calendar
 - PMG Training Calendar
- Contact Mgmt**
- Add New Contact
 - Search Contacts
 - My Followups
 - My Contacts
- Directories**
- Employee Directory
- Tools**
- Web Mail
 - New Flash Message
 - New Announcement
 - Announcements Archive
 - Flash Archive
- Benefits**
- FST Apple Store
 - 401K
 - Blue Shield HMO
 - Conexis
 - Legal Services
 - Emergi-care
 - Dental PPO
 - Attorneys
 - Express RX
 - Behavioral HMO

You have 1 Open Followup

FLASH MESSAGES ([view archive](#))

Effective: 1/2/2008
 Headline: Multiple
 Main Text: Franchise# : 40430 Owners : Jim Quinn
 15323 Midway Road
 Addison , TX 75001
 972-788-4266 FAX 972-788-2367
ocfile@sirspeedy4043.com

TestThis is a flash message. It can be long or short or wide

Archive

[Archive Selected Flash Items](#)

COMPANY ANNOUNCEMENTS ([view archive](#))

9/27/2007 [File Attachment Test](#) Archive

9/21/2007 [something](#) Archive

[Archive Selected Announcements](#)

CNN TOP STORIES [Restore](#)

[Search Google News](#)

[Exit polls: Last-minute decisions drive voters](#) - Tue, 08 Jan 2008 18:12:30 EST

[Coroner: Hiker's body mutilated after death](#) - Tue, 08 Jan 2008 18:28:57 EST

[Lawyers request second chance for Sen. Craig](#) - Tue, 08 Jan 2008 17:29:34 EST

[Commentary: Bhutto dynasty survives](#) - Tue, 08 Jan 2008 17:43:51 EST

[Did Dr. Phil step over line with Britney?](#) - Tue, 08 Jan 2008 11:11:20 EST

[Madeleine McCann's parents in movie talks](#) - Tue, 08 Jan 2008 15:00:04 EST

My Calendar For Today

1/8/2008	
7 AM	
8 AM	
9 AM	
10 AM	
11 AM	
12 PM	BMP Training (11:30 AM - 12:30 PM)
1 PM	
2 PM	
3 PM	
4 PM	
5 PM	
6 PM	

Default / Home Page Areas

- 1) Top line** : current user name, set options link, logout button
- 2) BMP main logo** - click to reload the home page in the main content panel
- 3) Franchisee Lookup by Last Name, Advanced Search**
- 4) Franchisee Detail block** - displays currently selected franchisee data and Quick Tools links or Advanced Search options
- 5) Left hand column** vertical navigation bar
- 6) Main content panel** - displays currently selected application (at startup - contains the "home" page")





Your Home Page

(bmp) logged in as Demo Guest [set options](#) [LOGOUT](#)

Franchisee Lookup by Last Name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Advanced Search](#)



- MY TOOLS**
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My Calendar For Today

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1 PM	
2 PM	
3 PM	
4 PM	
5 PM	
6 PM	

Default / Home Page Areas

- 1) My Followups current status** - displays count and status of followups assigned to the current user, links to the my followups detail page
- 2) Flash Messenger** - displays new "unread" Flash Messages and links to the flash message archive
- 3) Company Announcements** - displays new "unread" company announcements and links to the announcement archive
- 4) RSS news reader** - displays a user specified RSS news feed, allows for Google News Search





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Center Lookup “The Knob”

Alphabetical by LAST name

Franchisee Lookup by Last Name: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Advanced Search](#)

Zhang Qin Yao, Mgr - SSI300501 - O
Jim Quinn - SSI40430 - O
Donald Quinn, Jr. - SSI71320 - O
--Select an owner--

Advanced Search

Search Value:

First Name Franchise Number City State Abbrev.

Limit Results to Brands: PIP SSI TLI

Results:

George Coriaty - SSI00510 - O
Joe Coriaty - SSI00510 - O
--Select Result--



Quick Tools > Add New Contact

This Franchisee has **Open Followups**...refer to the listing below for more details...

Sir Speedy SSI40430

Contact text to be entered in here

Submit Report

Attach this contact report to the followup items selected below

Select one or more followups

Select: Due By: **Call Jim about new programs** Assigned To: 1288

Task: 0

[View Original Contact Text](#)

Select: Due By: **something to do** Assigned To: 1443

Task: 5

[View Original Contact Text](#)

Select: Due By: **check this out** Assigned To: 2150

Task: 11

[View Original Contact Text](#)

Options

Use Automatic Routing

Followup Required

Attach Document

Additional Visitors

Remember Selections

Contact Date

Jan 8 2008

Contact Method

--SELECT ONE--

Contact Type

--SELECT ONE--

Topic(s)

--SELECT ONE OR MORE--

Convention

Employee Management

Contact Form Overview :1

1) Open Followup Message - appears when the selected franchisee has open followups

2) Franchisee identifier - displays the selected franchisee brand logo and franchise id number

3) Report Text input box - Enter the contact text here. Always use language that includes the name of the person(s) contacted. Example: Spoke with Philip Crum about presenting at the next regional salesperson forum.

4) Submit Button - single click to submit the contact report to the system (Note: If the user overlooks making a required selection, a RED error message will appear at the top of the submission form explaining what to do to make the required corrections.)

5) Open followup report "threading" checkbox - visible only if the franchisee has open followups. Check this box to indicate that this contact should be connected (threaded) to the original contact report that initiated the checked followup(s) in the open followup listings section.

(continued)



Quick Tools > Add New Contact

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Task: 11

[View Original Contact Text](#)

Options

Use Automatic Routing

Followup Required

Attach Document

Additional Visitors

Remember Selections

Contact Date

Jan 8 2008

Contact Method

--SELECT ONE--

Contact Type

--SELECT ONE--

Topic(s)

--SELECT ONE OR MORE--

Convention

Employee Management

Contact Form Overview :2

6) Open followup listings - visible only if the franchisee has open followups. Check the listing to be connected (threaded) to the new contact report. Selecting a listing will attach the current contact report to the original contact report and remove the followup from the original assignee. Make sure to check both the open followup listing checkbox AND the open followup "threading" checkboxes. Refer to the open followup report "threading" checkbox section for more information.

7) Contact Date - the settings default to today's date. Be sure to select the correct contact date for the report.

Note: For monthly contact system summary reports, the contact will be credited to the month that the report is submitted to the system and not the contact date. Example: A franchisee contact is made in January, and the report is filed in February. The contact will be included in the February summary. Contact reports will be credited to the contact report author. If a user is selected as an "additional visitor", the contact summary report will credit the selected user with a contact.

8) Contact Method selection list - select the contact method used

9) Contact Type selection list - select the contact type from the available selections that best fits the situation.

(continued)



Quick Tools > Add New Contact

This Franchisee has **Open Followups**...refer to the listing below for more details...

Sir Speedy SSI40430

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Submit Report

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Select one or more followups

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Task: **0**

[View Original Contact Text](#)

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Task: **11**

[View Original Contact Text](#)

Options

Use Automatic Routing

Followup Required

Attach Document

Additional Visitors

Remember Selections

Contact Date

Jan 8 2008

Contact Method

--SELECT ONE--

Contact Type

--SELECT ONE--

Topic(s)

--SELECT ONE OR MORE--

Convention

Employee Management

Contact Form Overview :3

10) Contact Topics Multiple Selection List - hold the control key (CTRL/ ⌘) and click on one or more topics in the available listing. Note: The available topics are populated based on the franchisee brand.

11) Options checkboxes

a) Use Automatic Routing - check this box to allow the system to make decisions on how to route the email distribution of this contact report. If this report is attached to a followup, the original contact distribution list, will be added to this report. If the checkbox is left unchecked, the user will be prompted to complete a distribution list after the submit button is clicked.

When prompted add/remove corporate members by clicking on the appropriate name in either the "employee list" or the "distribution list". Click the "Submit Button" when complete.

b) Followup Required - check this box if this report will assign followups to another user. The user will be prompted to complete up to two followup sections after the the submit button is clicked. When prompted select the user by clicking on the name in the selection list, enter text explaining the followup assignment, and pick a due date. Click the "Submit Button" when complete. Up to two followups may be assigned to any single contact report.

(continued)



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Quick Tools > Add New Contact

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Options

Use Automatic Routing

Followup Required

Attach Document

Additional Visitors

Remember Selections

Contact Date

Jan 8 2008

Contact Method

--SELECT ONE--

Contact Type

--SELECT ONE--

Topic(s)

--SELECT ONE OR MORE--

Convention

Employee Management

Contact Form Overview :4

11) OPTIONS (CON'T)

c) Attach Document - check this box if your contact report involved a document that will be added to the franchisee document repository. The user will be prompted to select the file after the submit button is clicked. When prompted, select a file by clicking the "Browse" button. Click the "Submit Button" when complete.

Note: The MAXIMUM allowable file size for an attachment is 3MB. Take care when selecting a file attachment making sure the filename does NOT contain any "SPACES" or "SLASHES", and has a valid 3 letter file extension (.doc, .xls, .pdf, etc...)

d) Additional Visitors - check this box if the user was not the only corporate representative involved in the contact. This applies primarily to center visits, and can be applied to training venue contacts or conference calls as necessary. When prompted add/remove additional visitors by clicking on the user name in either the "Employee List" or the "Additional Visitor List". Click the "Submit Button" when complete.

e) Remember Selections - check this box if the user wants to "persist" the selection list choices for use with subsequent contact reports.



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Quick Tools > Add New Contact

This Franchisee has **Open Followups**...refer to the listing below for more details...

Sir Speedy SSI40430

Contact text to be entered in here

Submit Report

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Select one or more followups

Select: Due By: **Call Jim about new programs** Assigned To: **1288**

Task: **0**

[View Original Contact Text](#)

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Select: Due By: **check this out** Assigned To: **2150**

Task: **11**

[View Original Contact Text](#)

Options ▲

Use Automatic Routing

Followup Required

Attach Document

Additional Visitors

Remember Selections

Contact Date ▲

Jan ▼ 8 2008 ▼

Contact Method ▲

--SELECT ONE-- ▼

Contact Type ▲

--SELECT ONE-- ▼

Topic(s) ▲

--SELECT ONE OR MORE-- ▲

Convention

Employee Management

Contact Form Overview :5

Personalization options

Re-arrange the dropdown lists by clicking on the select list title and performing a drag and drop action to re-order the lists as they appear in the user's current browser.

Rollup and hide/display the dropdown lists by clicking on the "up" arrow icon next to the selection box title. Note: Some browsers do not quickly refresh the the selections lists contained in each section. To make the choices re-appear, click on the title of the selection area after "unrolling" the display box.



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Follow Ups

many**2one**

one2many

what does it mean?



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Contact Search

Contact Search Form

steps 1-10



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How-To

Add a New Contact Report

- 1) Select a franchisee
- 2) click the Quick Tools Menu item : Add New Contact
- 3) Set the selection dropdowns - contact method, contact type, topics and contact date.
- 4) Enter the contact text
- 5) Optionally set the "Options" checkboxes and followup checkboxes
- 6) Click the "Submit Report" button.
- 7) Complete any selected options if the user is prompted to do so.
- 8) After completing the prompted section(s), click the submit button.
- 9) A new blank report form will appear, and a "Success" message will appear at the top of the form.



How-To

Search for Contacts

- 1) From the navigation menu on the left of the page select "Search Contacts" from the contact management section.
- 2) Complete the various search criteria fields and click the "Search Now" button. The results will appear at the bottom of the search form and may be printed by clicking the printer icon on the right side of the form. The page will print exactly in it's present state, including the selected criteria and results list. It will not print the entire text of any located contact reports, only what is currently visible on the screen.

Note: The selected search criteria will be persisted every time a user clicks the "Search Now" button. Subsequent visits to the search form will automatically choose whatever criteria was previously used. The one exception is the "Owner Last Name" choice which will not select the previously selected owner.



How-To

Retrieve Archived Data

- 1)** Select a franchisee using either the basic lookup by last name or advanced search method
- 2)** In the Quick Tools section click on "View Contact History" link
- 3)** Reports will be displayed from both the new BMP contact and the Archived contact Systems.
- 4)** To connect to the old Archive, click the link at the top of the report page labeled "Search Archive" - this will connect the user to the appropriate legacy system based on the franchisee brand.
