

# Quick Start Guide

Get value from any one platform in under an hour — and keep your CRM.

## Welcome

The FranLink ecosystem is modular. Use FranLink, Franchise Matcher, or the FDD Insights Engine independently — or together. You never have to replace the CRM you already use.

**Five words to remember: Flexible · Modular · Consultant-First · AI-Enhanced · Built for franchise consultants.**

## Step 1 — Pick your starting platform

Platform	Start here if...
FranLink	You want a full Franchise Journey Platform: CRM, Candidate Intelligence, Journey, Company Review, Va
Franchise Matcher	You only need candidate-to-brand matching with brand scoring and Developer Performance Insights.
FDD Insights Engine	You want structured Item 5/6/7/19 extraction and brand intelligence from FDDs.

## Step 2 — Bring your data (keep your CRM)

Open the **Ecosystem Integration Center** and use the Import Wizard.

- Supported imports: Candidates, Brands, Contacts, Activities, Notes, Tasks.
- Column mapping, validation, preview, and an error report at every step.
- Pre-built export templates for HubSpot, Salesforce, Zoho, Pipedrive, Monday, Google Sheets.

**You never have to leave HubSpot, Salesforce, Zoho, Pipedrive, Monday, or Google Sheets. The Integration Center is the bridge.**

## Step 3 — Let Avery onboard you

Avery is your Onboarding Coach and Product Expert. Ask Avery anything: navigation, SOPs, training, best practices. Avery never makes brand or candidate decisions — Avery teaches you the ecosystem.

## Step 4 — Use the AI Copilot in the flow

The FranLink AI Copilot helps you prepare for Company Review, Validation, and Discovery Day with Candidate, Matching, FDD, and Developer Intelligence. Everything stays advisory; you remain the decision-maker.

## Step 5 — Track outcomes

Record consultant ratings, work-again indicators, and placement outcomes in **Developer Performance Insights**. This intelligence is internal — never exposed to candidates — and makes you more effective in future investigations.

### What's next

- Run the New Consultant Journey shadowing tour.
- Open the Help Center for category deep-dives.
- Open the Webinar & Marketing Kit when you're ready to talk about the ecosystem with peers.