



Policy Manager: Front end overview

The front end of Policy Manager is how the majority of users will interact with its content.

Users can browse all policies they have [permissions](#) to see and can accept those they have been asked to.

Filters on the left and a search bar assist with browsing for specific content.

The corresponding Pages component can be used to give a snapshot of the same content and allow users to accept policies from pages rather than always in the application itself.

This guide will cover all the options and controls available to users on the front end of the application.

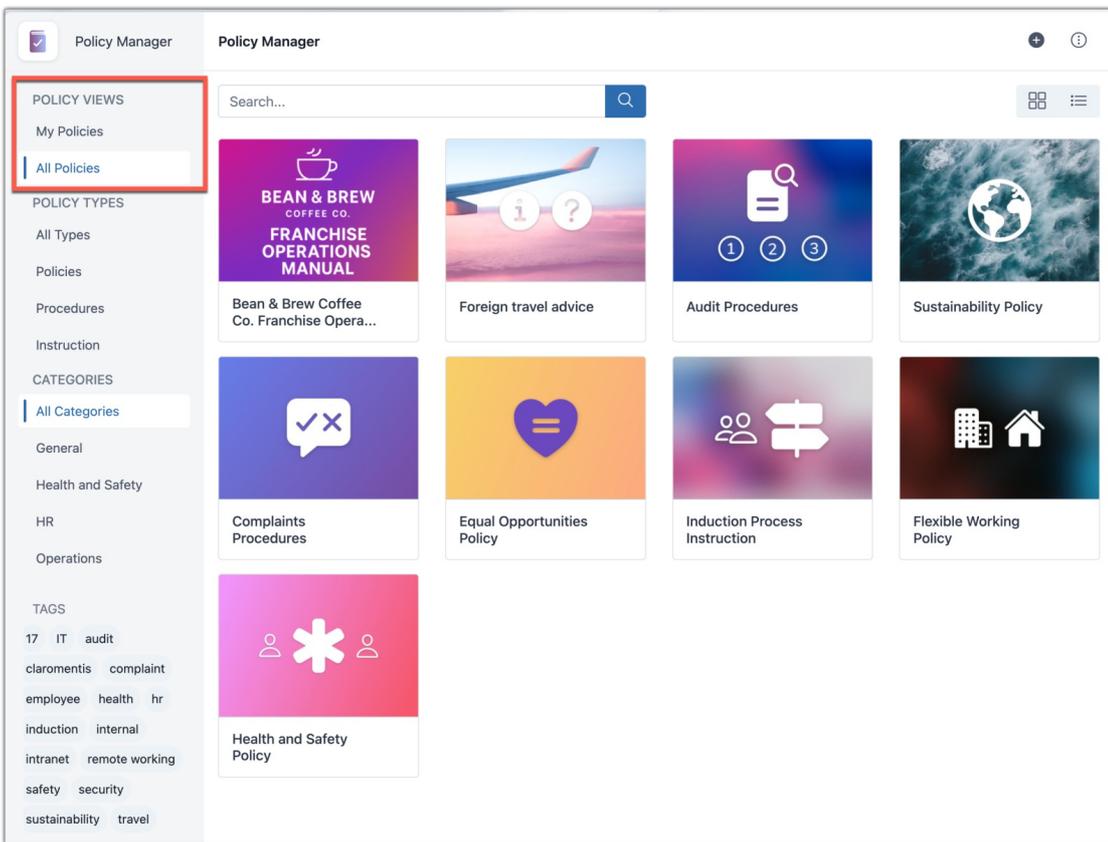
The Front End

Open Applications > Policy Manager to see all the areas detailed below.

- Default view

There are two views available in Policy Manager - All Policies & My Policies.

One is chosen as the default by administrators on the [admin side](#), which determines the tab that is automatically opened by all users when accessing the front end:



The most popular view is 'All Policies' as this lists all content a user has permission to view for them to browse.

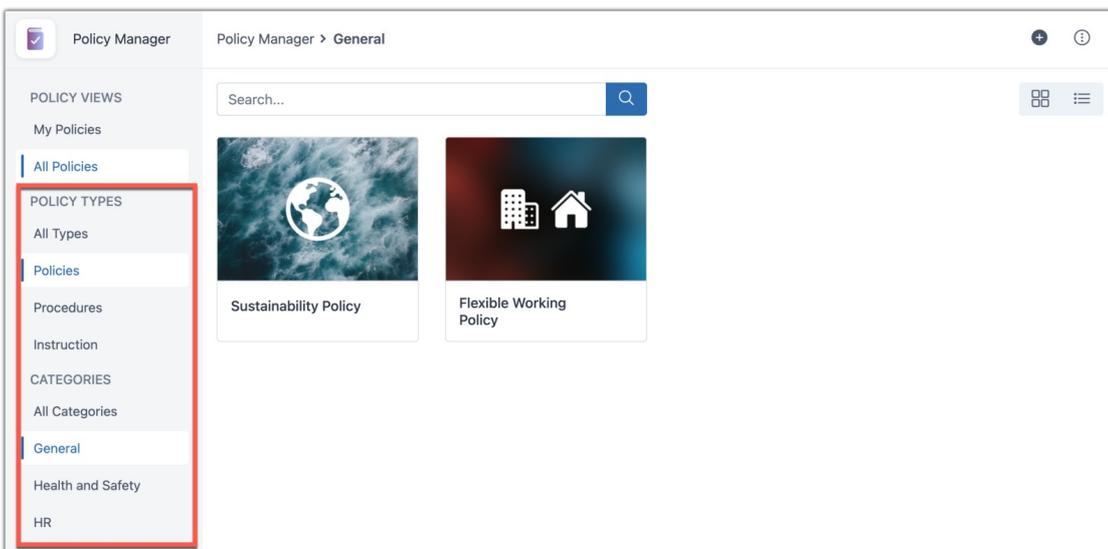
'My policies' will instead list only the policies a user has been set to accept.

Your administrators can choose the best default view to fit your needs.

- Filters

The filters on the left side of the screen can be clicked on to apply to the policies currently listed.

Policy Types and categories are managed by administrators on the [admin side](#) of the application.



Users will only see the categories for which they have [permissions](#).

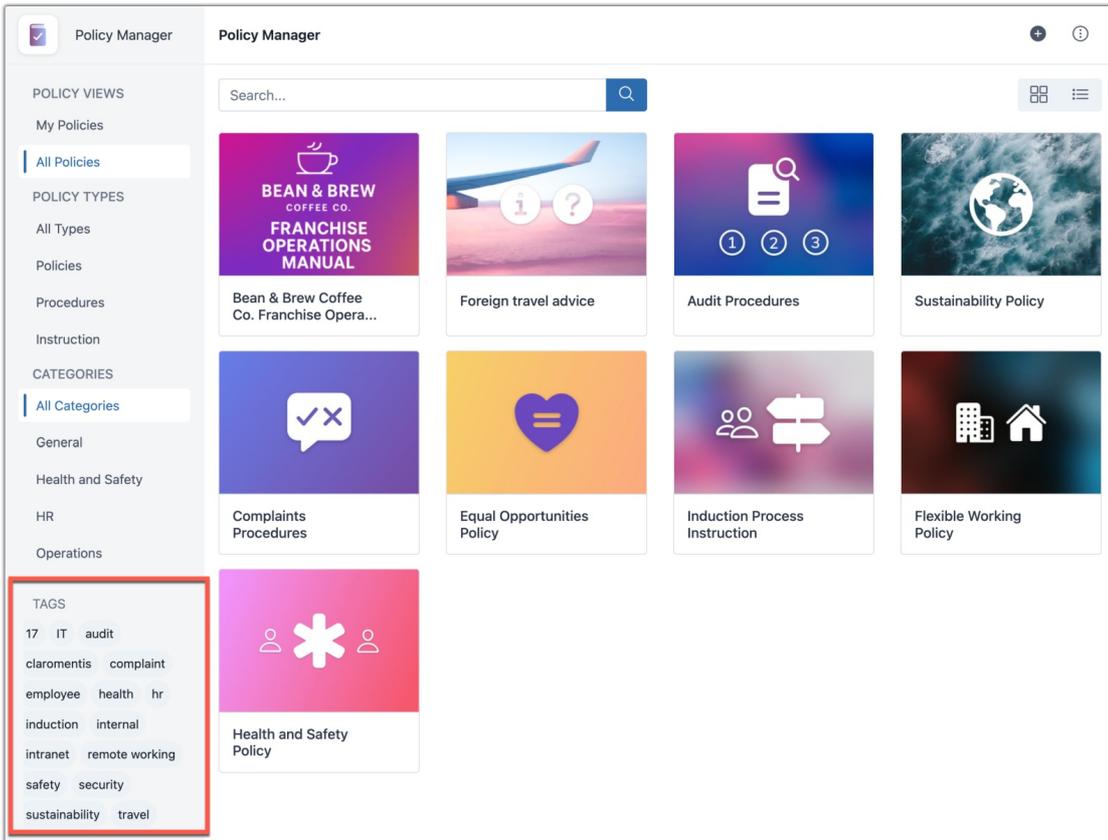
Select different categories and/or types to see how this changes the policies listed.

Users who can [create policies](#) will be able to save them under categories for which they have permissions and attribute a type if applicable.

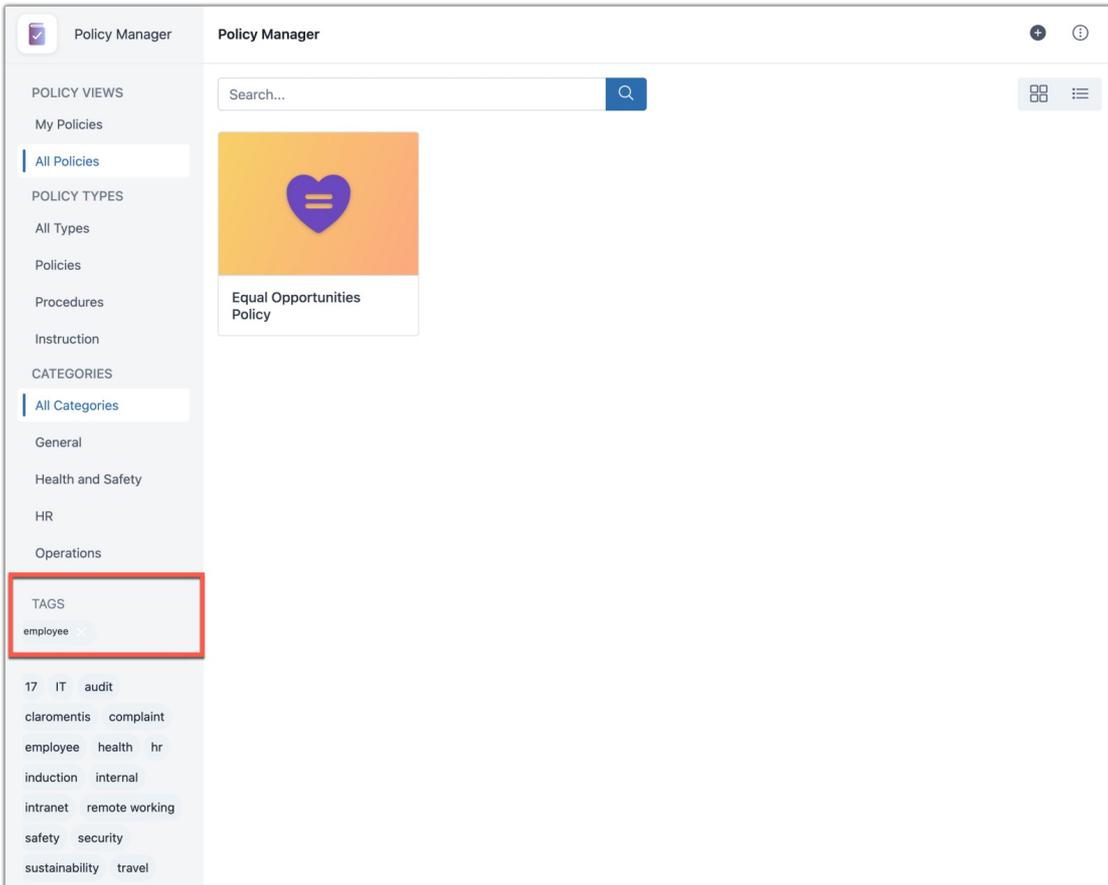
- Tags

Tags can be attributed to policies when creating or editing them.

A tag cloud will build over time and be offered to users to click on to assist their searching.



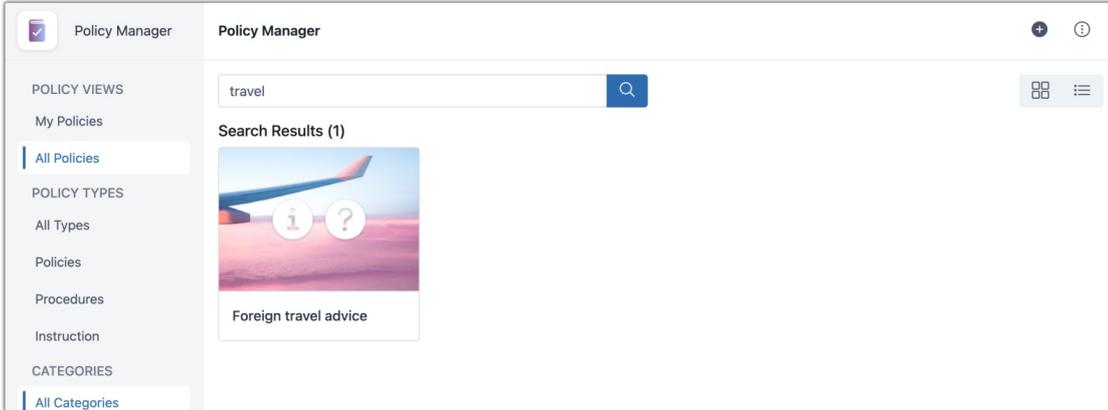
Click on a tag to be taken to view all policies with that tag (that you have permissions for)



- Search bar

Users can enter search terms to return policies.

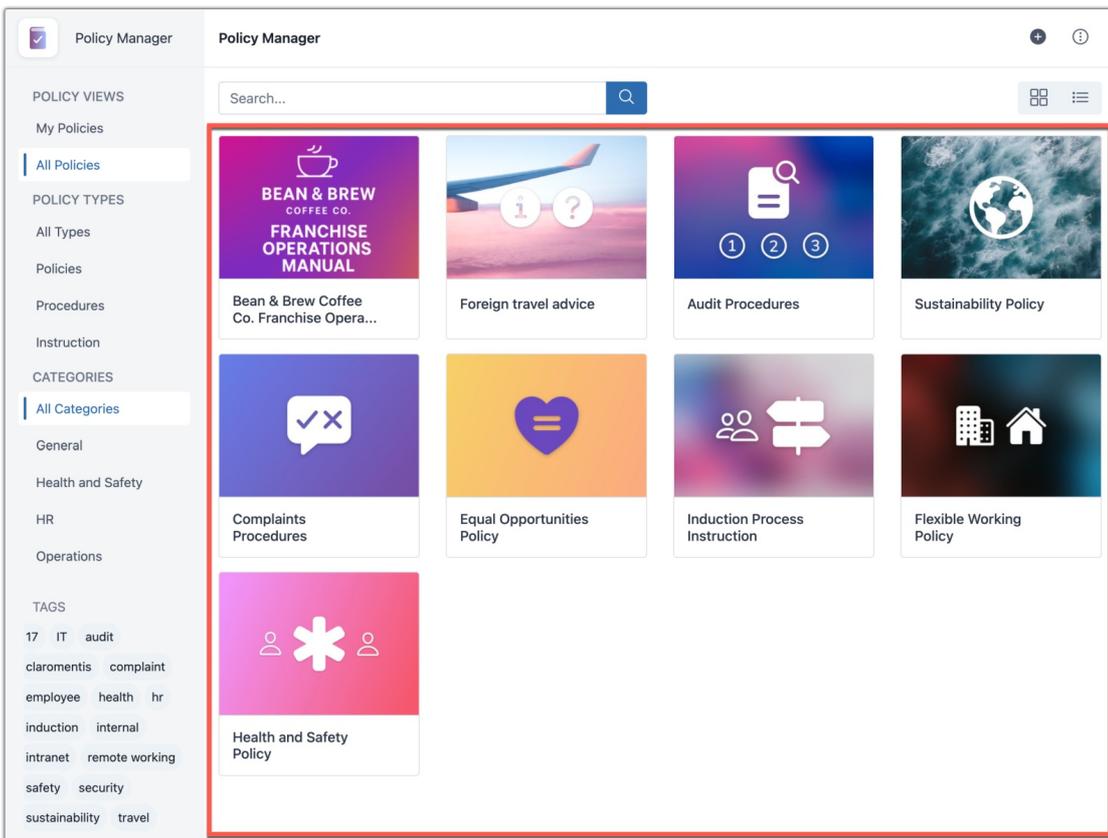
Policy titles, body and tags will be included in the search.



- Policies

This main area where the policies will be listed that a user has permission to see and based on which view has been chosen.

A user can change their view to browse too, but on next opening the application the default view will be set



Clicking into a policy opens it in full, and a user can read this (& accept it if required)

Policy Manager > Policy Details



PROCEDURES
OPS-001 - Bean & Brew Coffee Co. Franchise Operations Manual

Distribution Policy version 2

This Operations Manual provides essential guidance for successfully running a Bean & Brew franchise location.

The procedures outlined here must be followed at all times to ensure consistent service, safety, and brand representation.

Franchisees should use this manual as their primary reference point for day-to-day operations and staff training.

Bean & Brew Coffee Co. Franchise Operations Manual

Introduction

Welcome to Bean & Brew Coffee Co.! This Operations Manual provides essential guidance for successfully running a Bean & Brew franchise location. The procedures outlined here must be followed at all times to ensure consistent service, safety, and brand representation. Franchisees should use this manual as their primary reference point for day-to-day operations and staff training.

Store Opening Procedures

Each store must be fully operational and customer-ready no later than 15 minutes before posted opening hours. Opening responsibilities include:

- Unlock all doors and disarm the security alarm system.
- Switch on interior and exterior lighting.
- Activate coffee machines, grinders, and warming ovens.
- Conduct equipment checks (water pressure, espresso machine calibration, refrigerator temps).
- Restock front-of-house display with pastries and baked goods.

+ Create New Version

Edit Properties

Acceptance Status

Archived versions

OPS-001 - Bean & Brew Coffee Co. Franchise Operations Manual
 Policy version 1 Created: 5 June 2025

- View

There are 2 view options available - Icon or List

Each user can set their own view style using the buttons.

Policy Manager

Policy Manager

Search...

Icon View **List View**

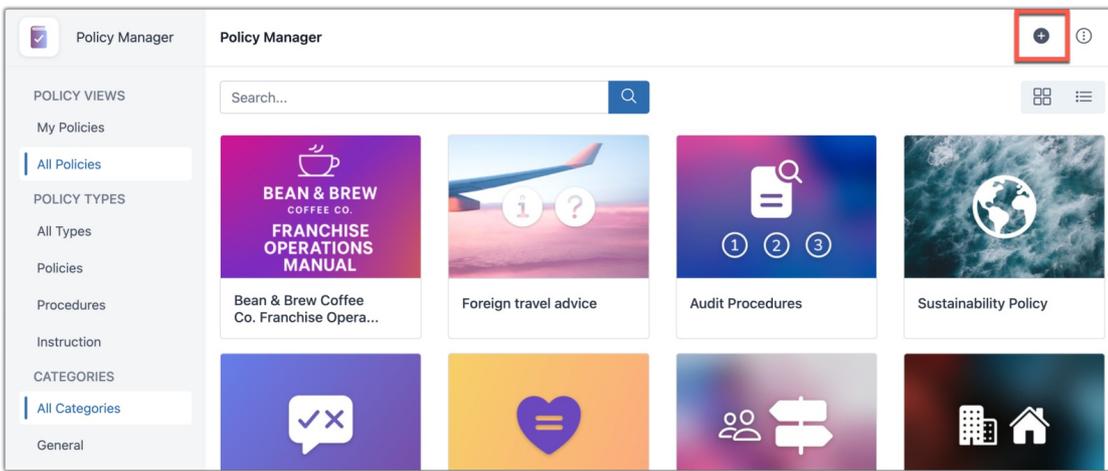
Reference	Title	Asset	Owner	Last Modified	Create
OPS-001	Bean & Brew Coffee Co. Franchise Operations Manual	Page	Claromentis Administrator	05-06-2025 15:54	05-06-
INS-0002	Foreign travel advice	Weblink	Michael Christian	06-02-2025 20:03	25-02-
PDR-0003	Audit Procedures	Page	Michael Christian	10-11-2025 19:31	24-02-
POL-0003	Sustainability Policy	Page	Michael Christian	10-11-2025 19:31	24-02-
PDR-0001	Complaints Procedures	Page	Michael Christian	05-06-2025 15:33	24-02-
POL-0004	Equal Opportunities Policy	Page	Michael Christian	05-11-2025 07:28	24-02-
INS-0001	Induction Process Instruction	Page	Kerensa Johnson	10-11-2025 19:31	17-04-:
POL-0002	Flexible Working Policy	Page	Abigail Clark	10-11-2025 19:32	17-04-:
POL-0001	Health and Safety Policy	Page	Nigel Davies	10-11-2025 19:32	17-04-:

- Create new policy button

The cross button will appear to users with [permissions to create a new policy](#).

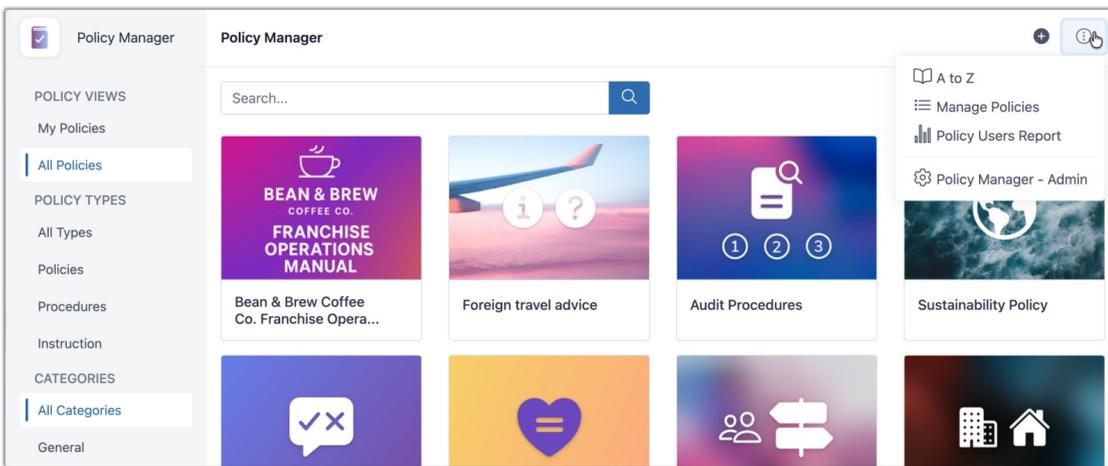
Administrators can set permissions per category (on the [admin side](#) of the application) to give users this ability.

Our guide [here](#) details the policy creation process.

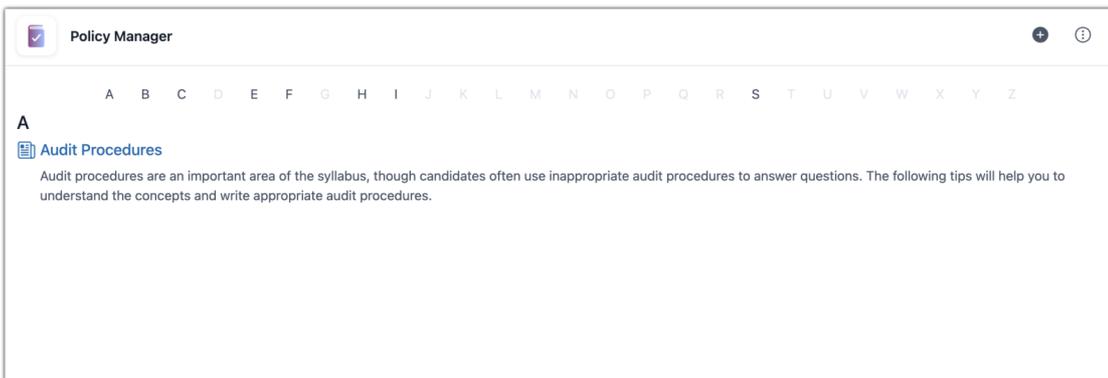


- 3 line menu

Users can click the 3-line menu to see more options that they have permissions for.



- A-Z will open a new screen to assist in searching by policy title:



- The 'Manage policies' area will list all policies a user can see. If they have 'edit policy' and or 'edit policy content' permissions, they will see icons in the 'action' column to make edits or delete policies:

Policy Manager

Manage Policies

Keywords Status

Advanced search

Reference	Title	Asset	Type	Owner	Status	Review Date	Action
OPS-001	Bean & Brew Coffee Co. Franchise Operations Manual	Page	Procedures	Claromentis Administrator	Distribution		✍ 🗑 +
INS-0002	Foreign travel advice	Weblink	Instruction	Michael Christian	Distribution		✍ 🗑 +
PDR-0003	Audit Procedures	Page	Procedures	Michael Christian	Distribution	7 March 2027	✍ 🗑 +
POL-0003	Sustainability Policy	Page	Policies	Michael Christian	Distribution	23 May 2027	✍ 🗑 +
PDR-0002	Security Procedures	Page 🗨 1	Procedures	Michael Christian		30 August 2026	✍ 📦 🗑
PDR-0001	Complaints Procedures	Page	Procedures	Michael Christian	Distribution		✍ 🗑 +
POL-0004	Equal Opportunities Policy	Page	Policies	Michael Christian	Distribution		✍ 🗑 +
INS-0001	Induction Process Instruction	Page	Instruction	Kerensa Johnson	Distribution	30 April 2027	✍ 🗑 +
POL-0002	Flexible Working Policy	Page	Policies	Abigail Clark	Distribution	30 December 2027	✍ 🗑 +
POL-0001	Health and Safety Policy	Page	Policies	Nigel Davies	Distribution	30 April 2026	✍ 🗑 +

- The Policy Users report option will only appear to users who have been given [report](#) access by administrators on the [admin side](#):

Policy Manager

Approved Status Status

Categories Type

User list

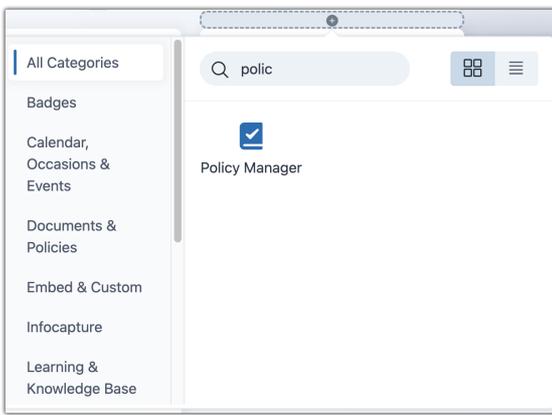
Name	Job Title	Reference	Policy Title	Categories	Status	Accepted Status	Date Accepted
Claromentis Administrator	System Administrator	OPS-001	Bean & Brew Coffee Co. Franchise Operations Manual	Operations	Distribution	⊖	
Jennifer Langdon	Trainer	OPS-001	Bean & Brew Coffee Co. Franchise Operations Manual	Operations	Distribution	⊖	
Pippa Fraser	Human Resources Manager	OPS-001	Bean & Brew Coffee Co. Franchise Operations Manual	Operations	Distribution	⊖	
Vanessa Wright	Sales Manager	OPS-001	Bean & Brew Coffee Co. Franchise Operations Manual	Operations	Distribution	⊖	

- The Policy manager admin shortcut will only appear to application administrators of Policy Manager.

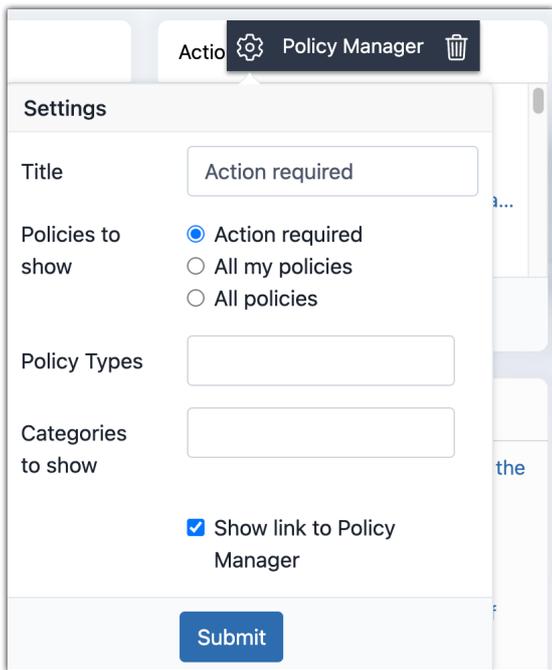
Pages component

The Policy Manager page component can be used to display policy content across the site in useful areas.

Edit a page and find the component in the list



Check out its options to set up what you would like it to pull through



Action required is the most commonly used setting, as it will list the policies a user has yet to accept.

Users can click through to these from the page the component is on rather than needing to open the application front-end directly.

claromentis

Ask anything 12:15

Home Company Projects Product Training Sales Training

Good Afternoon Claromentis Administrator
Welcome to your Franchise Management Platform!

Onboarding Training E-Learning Marketing Assistance

Latest Product Updates

New Product Catalogue Now Available f...
15 April 2025
We're excited to announce the release of our brand-new 2025 Product Ca...
This year's edition includes:
Unlike 1 Like 1

Upcoming Events

Sales Training - Florida - 2026 Season Pinned
Training Event
Thursday, 10 December, 11:00 - 13:00
Florida, USA
1 registered 49 available

Action required

- Bean & Brew Coffee Co. Franchise Operations Manual**
This Operations Manua...
Distribution
Policy version 2
- Foreign travel advice**
Travel Advice from UK ...
Distribution
Policy version 1
- Audit Procedures**
Audit procedures are a...
Distribution
Policy version 1
- Sustainability Policy**
Claromentis is commit...
Distribution
Policy version 1

View my policies

News Direct from our Franchisees

MyStore **Central London Store Gets a Stunning New Refit**
15 April 2025
Exciting updates from our Central London franchise! Following a complete refit, the store now boasts a sleek, modern design with improved layout, upgraded signage, and fresh branding elements. The new environment enhances customer experience and reflects the evolving MyStore identity — come take a...

Welcome, Sarah and Paul!

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Created on 20 March 2026 by Hannah Door

Tags: policy