

# Springboard to Success

## Activities Book – Get Your Data Straight

*There are a million things to know about each of your franchisees, and you can't possibly stay on top of all of them at all times...so how do you choose what's important? **There are five critical things** that you should start by keeping for each unit.*

This book gives you the steps to review your franchisees' owner and entity details, and check for the presence and currency of some critical dates.

We invite you to use these instructions, to submit questions to [training@franconnect.com](mailto:training@franconnect.com), and if you're really really stuck, we invite you to schedule a 1:1 session with us to help you through these processes. You can schedule that time using this link: <https://tinyurl.com/677y7tz8>.

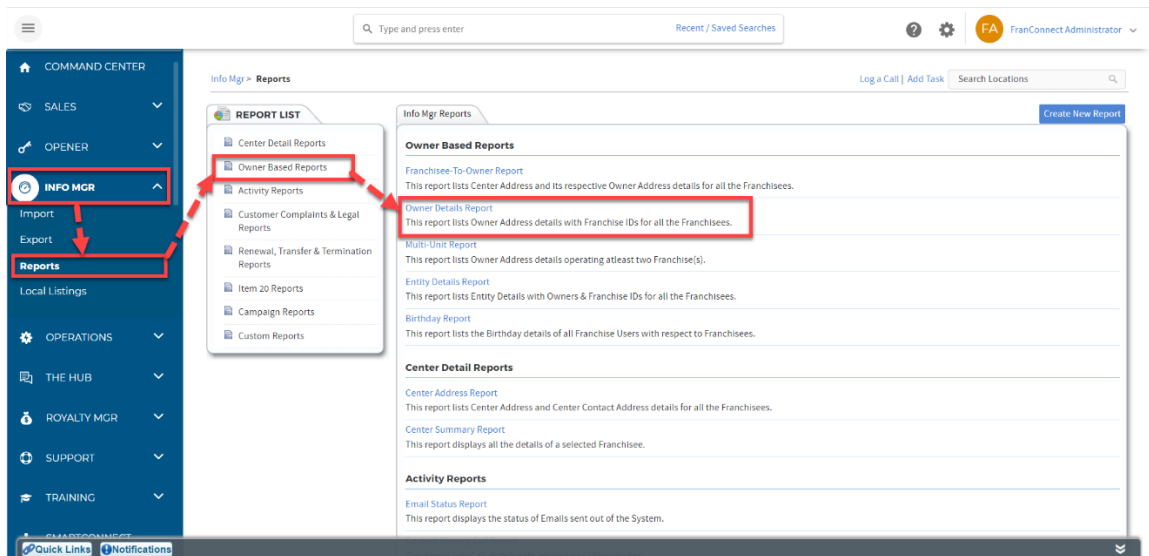
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## Reviewing Owner Details

Record-keeping is tough when you've got multiple versions of the same record in the database. A typical example of how this happens is when a location is being entered that's the second or later location for one of the owners, and instead of checking for an existing owner, a new owner is entered. This will make it hard down the road for your Franchise Owner to see all of their records, and for you to report on their units as a group.

You can quickly review for duplicate owner records by running an Owner Details Report. Go to Info Manager > Reports > Owner-based Reports > Owner Details report.



The Owner Details report will be sorted by Owner name as the default, and you can click on the header to sort A-Z or Z-A. In the example below, we have several owner records for Aaron Russell.

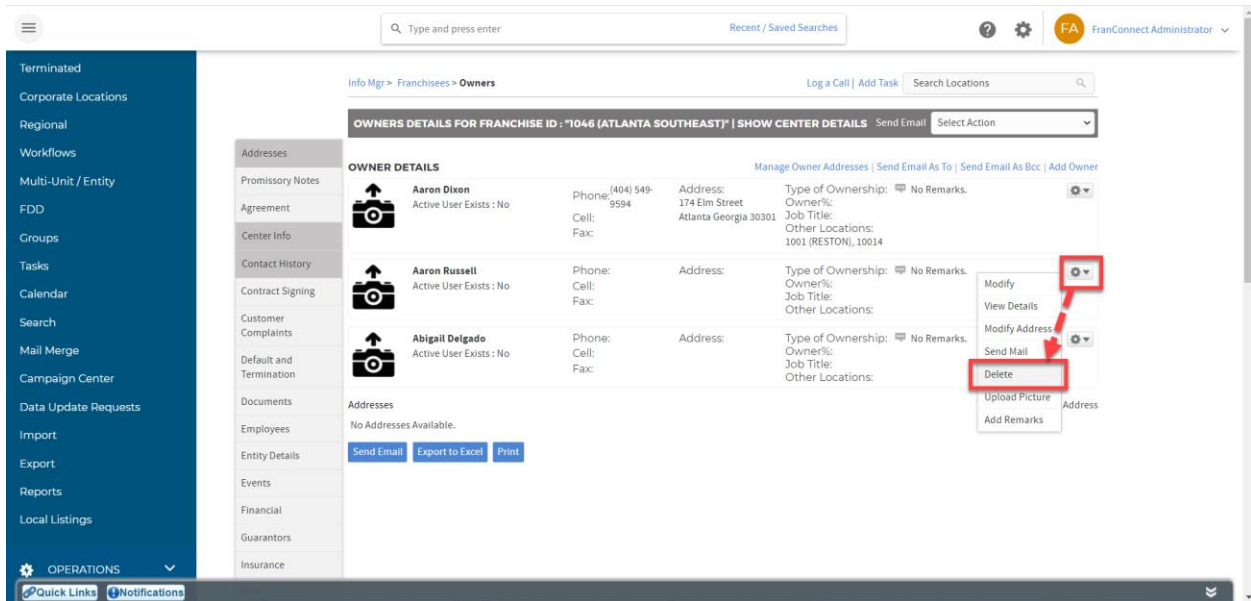
**OWNER DETAILS REPORT** [Back to Reports](#)  
Lists Owner Address details with Franchise IDs for all the Franchisees

Owner	Franchise ID
Aaron Dixon	1001 (RESTON) (Reston)   1010 (Herndon West)   1038TR (Center park)
Aaron Dixon	1001 (RESTON) (Reston)   10014 (Roseville West)   1046 (Atlanta Southeast)
Aaron Knight	20200106 (20200106)
Aaron Max	STORE-237 (2298-THE CANNERY) (2298-The Cannery)
Aaron Russell	1010 (Herndon West)   1101 (Kohl's)   9253 (Rockville - Congressional)
Aaron Russell	1046 (Atlanta Southeast)
Aaron Russell	New Jersey location (FC)

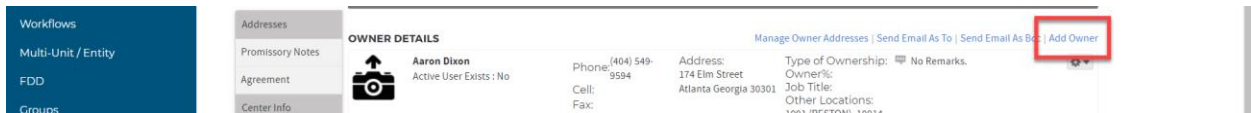
It's important to make sure this doesn't represent three different people named Aaron Russell, and if you've been putting email records into your owner records, that should help you sort them out. In this case, when making locations 1046 and "New Jersey Location", the enterer didn't check for the existing multi-unit owner.

**Pro Tip:** Now is a good time to export an Excel file of your owner details, in case you need to do a large-scale review.

Consolidating duplicate owners is simple. Go to the first store with a duplicate owner on it (for example 1046) by clicking on the blue Location name. Click on the "Owners" tab, and you'll see a list of the current owners. Click on the Action Wheel next to the erroneous owner, and choose to Delete.



Now that the wrong owner is out, it's time to put the right owner in. Choose "Add Owner" at the top right of the owner screen.



In the Add Owner dialog box, choose Existing Owner, and choose the correct owner record from the choices. You can't know for sure from the drop-down, but it's almost always the first one. Then click Add.

OWNERS DETAIL

Owners Type:  Individual  Entity

Owner:  New Owner  Existing Owners

\*Select Owner(s): Aaron Russell

Owners

Aaron Russell

Ownership Start Date: 09/13/2021

Add Cancel

Type & Enter

- Aaron Dixon
- Aaron Knight
- Aaron Max
- Aaron Russell
- Aaron Russell
- Abdul Aziz Keffer
- Abigail Delgado

NOTE: Occasionally, you'll have two owners and neither one is listed as a multi-unit owner. In that case, pick the one you'll use as the primary owner from the drop-down list of Existing Owners, and you'll be asked to provide a Multi-unit ID for the owner. Name them according to your current convention. If you don't have a convention yet, firstname.lastname is a good MUID convention.

When you run the Owner Detail report again, you'll see this location (1046 in our example) added to the multi-unit owner.

OWNER DETAILS REPORT [Back to Reports](#)

Lists Owner Address details with Franchise IDs for all the Franchisees

Owner	Franchise ID	Home Address	Phone	Phone Extension	Fax Mobile	Email	Other Address	Taxpay
Aaron Dixon	1001 (RESTON) (Reston)   1010 (Herndon West)   1038TR (Center park)					test123@test123.com		
Aaron Dixon	1001 (RESTON) (Reston)   10014 (Roseville West)   1046 (Atlanta Southeast)	174 Elm Street Atlanta Georgia USA 30301	(404) 549-9594					
Aaron Knight	20200106 (20200106)							
Aaron Max	STORE-237 (2298-THE CANNERY) (2298-The Cannery)							
Aaron Russell	1010 (Herndon West)   1046 (Atlanta Southeast)   1101 (Kohl's)   9253 (Rockville - Congressional)							
Aaron Russell	New Jersey location (FC)							
Abdul Aziz Keffer	BB-1114 (Alliston)							
Abigail Delgado	1046 (Atlanta Southeast)							
Abigail Delgado	Wyoming (San Diego - 2)							
Abigail	Montana 003 (Montana 003)							

Quick Links Notifications

NOTE: Occasionally, you'll have two owners and neither one is listed as a multi-unit owner. In that case, pick the one you'll use as the primary owner from the drop-down list of Existing Owners, and you'll be asked to provide a Multi-unit ID for the owner. Name them according to your current convention. If you don't have a convention yet, firstname.lastname is a good MUID convention.

## Doing large-scale review

If you only have a few owners, this method will be an easy way to do your review. But what if you have hundreds of owners? In that case, we recommend that you run your Owner Details Report and save it to Excel for analysis.

	A	B	C	D	E	F	G
1							
2							
3							
4	Count	Owner Name	Franchise ID	Home Address	Phone	Phone Extension	Fax
5	2	Aaron Dixon	1001 (RESTON) (Reston)   1010 (Herndon West)   103				
6	2	Aaron Dixon	1001 (RESTON) (Reston)   10014 (Roseville West)   1174 Elm StreetAtlantaGeor	(404) 549-9594			
7	1	Aaron Knight	20200106 (20200106)				
8	1	Aaron Max	STORE-237 (2298-THE CANNERY) (2298-The Cannery)				
9	3	Aaron Russell	1010 (Herndon West)   1101 (Kohl's)   9253 (Rockville)				
10	3	Aaron Russell	1046 (Atlanta Southeast)				
11	3	Aaron Russell	New Jersey location (FC)				
12	1	Abdul Aziz Keffer	BB-1114 (Alliston)				
13	3	Abigail Delgado	1046 (Atlanta Southeast)				
14	3	Abigail Delgado	Wyoming (San Diego - 2)				
15	3	Abigail Delgado	Montana 001 (Montana 001)				

To quickly identify potential duplicate owner names, follow these quick steps:

1. Insert a column before the first column in the spreadsheet.
2. Give it a header such as "count".
3. In the first record of Column A, enter the formula: `=COUNTIF (B$5:B$5000, B5)`
  - a. The red portion of the formula represents the range of owner names. The Dollar Signs after the B are important, they'll keep that range steady even when you copy the formula to other records.
  - b. The blue portion refers to the owner name on the record. Hence this formula counts how many records have the same owner name as this record.
4. Choose to filter on the row containing the headers, and filter for people with count greater than 1. If you sort by owner name, you'll have a list of only your possible duplicates and their associated locations.
5. Now, go to Info Manager > Franchisees, and search for locations based on your excel list to perform the above owner cleanup.

The screenshot shows the FranConnect Admin interface. On the left, the 'INFO MGR' menu is expanded, with 'Franchisees' highlighted. A red dashed arrow points from the 'Franchisees' menu item to the 'Search Locations' search bar in the top right corner of the main content area. The main content area displays a table titled 'FRANCHISE LOCATIONS' with columns for Franchise ID, Owner, City, State, Phone, Area / Region, Area / Region Owner, Opening Date, and Action. The table contains several rows of data, including entries for Reston, Belmont Ridges, and Roseville West.

## Reviewing Entity Details

Often, franchisees own a unit via an entity, such as a corporation. To review the Entity information in your FranConnect instance, choose Info Mgr > Multi-Unit/Entity > Entity.

The screenshot shows the FranConnect interface. The left sidebar is titled 'INFO MGR' and contains a list of navigation options: Dashboard, In Development, Franchisees, Terminated, Corporate Locations, Regional, Workflows, **Multi-Unit / Entity**, FDD, Groups, Tasks, Calendar, Search, and Mail Merge. The 'Multi-Unit / Entity' option is highlighted with a red box. A red dashed arrow points from this option to the main content area. The main content area is titled 'ENTITY INFO' and features a table of entities. The table has the following columns: Entity Name, Area / Region, Area / Region Owner, Owner, Current Franchisee(s), City / State, Country, and Phone. The table lists several entities, including ABC, ABC Corp, ABC LLC, ACME Partners, Carlsbad Entity, CK BrandA SS, and DaBomb Brothers. The 'Entity Name' column is highlighted with a red box. The 'Actions' button is also highlighted with a red box. The table data is as follows:

Entity Name	Area / Region	Area / Region Owner	Owner	Current Franchisee(s)	City / State	Country	Phone
ABC			Aaron Finch   Amanda Jacques	Dallas-1 (Dallas-1)			
ABC Corp			Aaron Dixon	1001 (RESTON) (Reston)			
ABC LLC			Sandy Nadia	1001 (Belmont Ridges)		USA	
ACME Partners			Sharon Hawkins	10014 (Roseville West)   1039 (Central AR)	Reston / Virginia	USA	(888) 555-1212
Carlsbad Entity			Jane Franchisee   Jon Franchisee	1004 (Annandale)			
CK BrandA SS			Charles Kerr	1032 (SE Sandy Spring)			
DaBomb Brothers			Mike Davidson	Store-420 (Farmingdale)			

This will give you a sortable list of all the entities, the individual owners associated with them, and the locations that the entity is associated with.







To change information about the entity, click on the blue Entity Name in the record. In the entity record you'll be able to add or change information about the entity, and using the "Owners" tab, associate or disassociate owners with the entity.

Info Mgr > Multi-Unit / Entity > Owners Log a Call | Add Task

**ENTITY NAME: ACME PARTNERS** Send Email

**OWNER DETAILS** [Manage Owner Addresses](#) | [Send Email As To](#) | [Send Email As Bcc](#) | [Add Owner](#)

 <b>Jim McKenny</b> Franchise: 1039 Active User Exists : Yes	Phone: Cell: Fax:	Address:	Job Title: Other Locations:	<input type="text" value="No Remarks."/> 
 <b>Aaron Dixon</b> Franchise: 10014 Active User Exists : No	Phone: (404) 549-9594 Cell: Fax:	Address: 174 Elm Street Atlanta Georgia 30301	Job Title: Other Locations: 1046, 1001 (RESTON)	<input type="text" value="No Remarks."/> 

Addresses [Add Address](#)

No Addresses Available.

[Send Email](#) [Export to Excel](#) [Print](#)

- Contact History
- Entity Details
- Agreement
- Contract Signing
- Customer Complaints
- Documents
- Employees
- Events
- Financial
- Guarantors
- Insurance
- Legal Violation
- Lenders
- Marketing
- Mystery Review
- Owners**

To disassociate an entity from a location, click on the blue location in the Entity List. In the Location record, go to the Entity Details tab and choose to delete the Entity.

## ENTITY INFO

Actions

[Change to Multi-Unit View](#)

<input type="checkbox"/>	Entity Name	Area / Region	Area / Region Owner	Owner	Current Franchisee(s)
<input type="checkbox"/>	ABC			Aaron Finch   Amanda Jacques	Dallas-1 (Dallas-1)
<input type="checkbox"/>	ABC Corp			Aaron Dixon	1001 (RESTON) (Reston)
<input type="checkbox"/>	ABC LLC			Sandy Nadia	1001 (Belmont Ridges)

Info Mgr > Franchisees > Entity Details Log a Call | Add Task

**ENTITY DETAILS DETAILS FOR FRANCHISE ID: "1001 (RESTON) (RESTON)" | SHOW CENTER DETAILS** Send Email

- Addresses
- Promissory Notes
- Agreement
- Center Info
- Contact History
- Contract Signing
- Customer Complaints
- Default and Termination
- Documents
- Employees
- Entity Details

ENTITY DETAILS [Edit](#) [Delete](#)

Name: [ABC Corp](#)

Area / Region: \_\_\_\_\_ Area / Region Owner: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ Country: \_\_\_\_\_

Zip / Postal Code: \_\_\_\_\_ State / Province: \_\_\_\_\_

Phone: \_\_\_\_\_ Phone Extension: \_\_\_\_\_

Fax: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_ Country of Formation/Residency: USA

Date of Formation: \_\_\_\_\_ State of Formation/Residency: \_\_\_\_\_

Taxpayer ID/FEIN: \_\_\_\_\_ Entity Type: Corporation

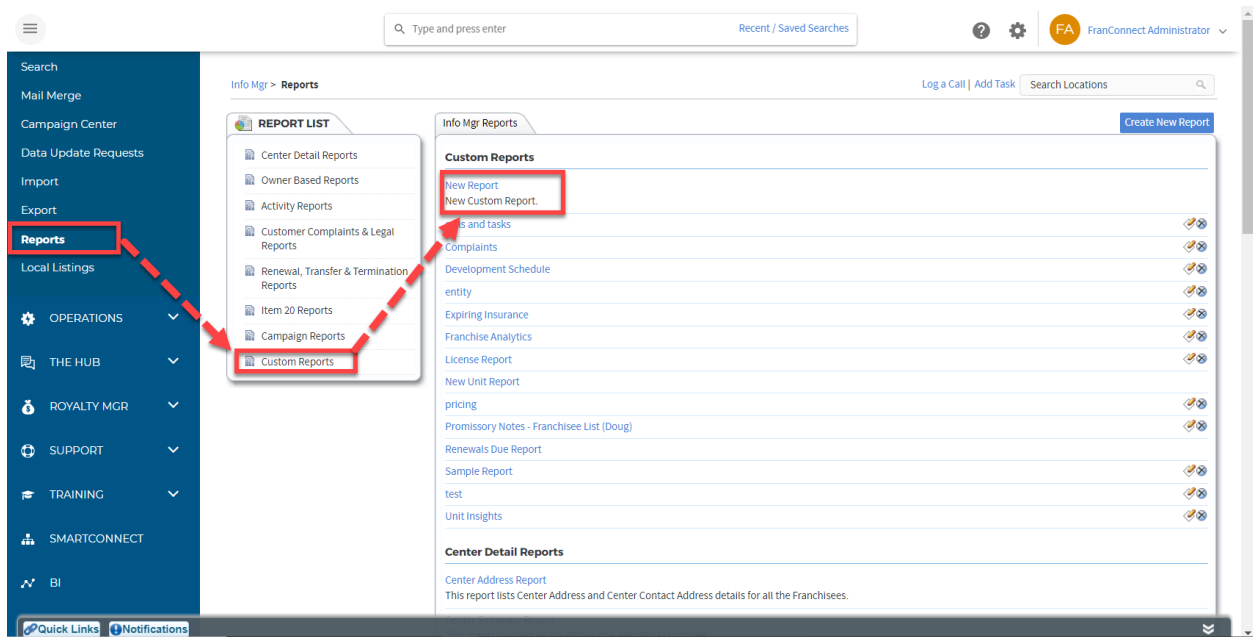
custom text field 2: \_\_\_\_\_

Formation Document Title: \_\_\_\_\_ Document: Not Available

## Reporting on Important Date Information

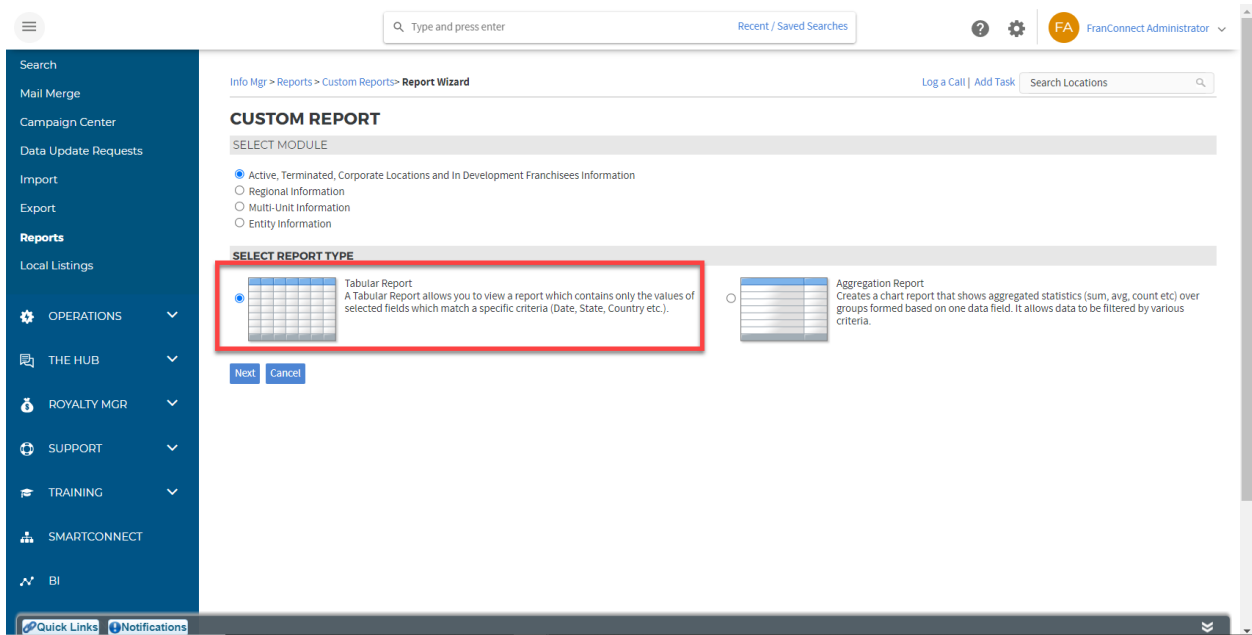
You can report on any information stored in the Info Manager with a custom report. If you're wondering what information you need to clean or collect for your franchisees, you may choose to do a report on the important dates in your franchisee's lifecycle. Typical ones are Franchise Agreement Renewal, Lease Renewal and Insurance Renewal, as well as FDD redisclosure.

We'll start out by making a custom report. Go to Info Mgr > Reports > Custom Reports > New Report.



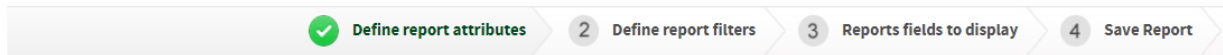
We want a list of information for Locations, so we will choose the top radio button. Note that you could also do a custom report for Entity or Multi-Unity information here.

We want a detailed list of each location and information about it, so we will choose a Tabular Report. An aggregation report would give us summary information, such as how many locations are in a given region, etc.



Press Next. Now we'll name the report, so we can easily tell what it does when we need it later.

## CUSTOM REPORT



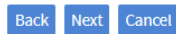
### ADD INFORMATION

Report Type : Tabular Report

\*Report Name :

Accessibility :

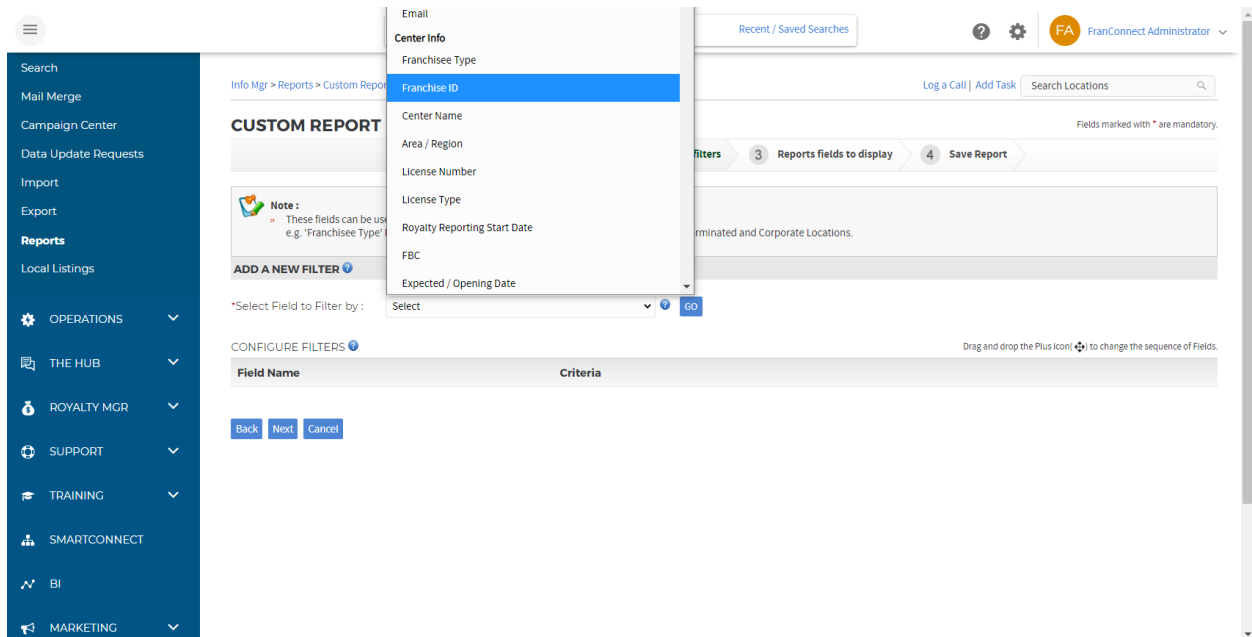
Description :



Press Next. To build the report, we need something to filter by, and a good thing to start with is the Franchise ID.

Note: for all field drop-downs in reporting, the fields are sorted first by the Tab they're on, then the field names, in the order they appear in the tab. Use the slider bar to the right to navigate to each field you'd like.

When you choose your sort field, press Go to add it to the filter criteria. Press Next.



Select fields for display – these are the fields that will appear on the report. You don't have to choose them in order, as you'll be able to re-order them once you get them on the page. We recommend the following fields as important to review. You may not use all of them – choose the ones you're interested in. Use the four-arrow icons to move fields up and down the list, to order your report display.

CONFIGURE FIELDS FOR DISPLAY ?

Field Name	Customize Label
⤴ Center Info > Franchise ID	Franchise ID
⤴ Insurance > Insurance Expiration Date	Insurance Expiration Da
⤴ Real Estate > Lease Expiration	Lease Expiration
⤴ Renewal > New Expiration Date	New Expiration Date
⤴ Transfer > FA Expiration Date	FA Expiration Date
⤴ Financial-Version Details > End Date	End Date

When finished selecting fields, press Next, and confirm in the following page to run your report.

The resulting report will look something like the one below. This should give you a good idea of the fields you’re using now and ones you might want to start populating.

**REPORT DETAILS**

Report Name : Important Dates      Report Type : Tabular Report

Created By : FranConnect Administrator      Created On : 09/13/2021

Description : A list of dates for franchisees, to analyze what needs to be completed.

Layout :  With merged cells for repeated data    Without merged cells      Displaying 1 to 50 of 553 results. ◀ 1 2 3 4 5 6 7 8 ▶

Franchise ID	Insurance Expiration Date ▼	Lease Expiration	New Expiration Date	FA Expiration Date	End Date
Store-419	08/04/2025	09/30/2025			12/31/2020
Store-487	06/13/2023	06/11/2025			12/31/2020
Store-251	01/04/2023 01/04/2022				
1000	01/04/2023 01/04/2022 01/04/2021	01/15/2022			12/31/2021
1001	01/04/2023 11/10/2020	11/10/2021	06/28/2019		03/02/2021
1009	08/02/2021				03/02/2021
1001 (RESTON)	01/04/2021	01/15/2022		12/23/2020	12/31/2021
1005	11/05/2020	11/05/2022			12/31/2021
1004	08/07/2020	08/07/2022			03/02/2021
1002					12/31/2021
Store-55					

◀ 1 2 3 ▶

### Next Steps

In the coming weeks, we’ll explore how to update this data with the help of your Franchisees. Give some thought to the data that might be missing or old for each of your locations, owners and entities. Be prepared to bring them up at Session 4 – Automating Data Refreshes.