

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 <u>training@franconnect.com</u>, 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: <u>https://tinyurl.com/677y7tz8</u>.

Contents

Reviewing Owner Details	3
Doing large-scale review	7
Reviewing Entity Details	
Reporting on Important Date Information	
Next Steps	

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.

	Q Typ	pe and press enter	Recent / Saved Searc	thes	0 0	FranConnect Administrator 🗸
♠ COMMAND CENTER	Info Mgr > Reports			Lo	g a Call Add Task Search	Locations Q
🔊 SALES 🗸 🗸	REPORT LIST	Info Mgr Reports				Create New Report
of OPENER V	Center Detail Reports	Owner Based Reports				
	Owner Based Reports Activity Reports	Franchisee-To-Owner Report This report lists Center Address and its res	pective Owner Address details for all the Fran	ichisees.		
Import	Customer Complaints & Legal Reports	Owner Details Report This report lists Owner Address details wit	h Franchise IDs for all the Franchisees.			
Export Reports	Renewal, Transfer & Termination Reports	Multi-Unit Report This report lists Owner Address details op	erating atleast two Franchise(s).			
Local Listings	Item 20 Reports	Entity Details Report This report lists Entity Details with Owner	s & Franchise IDs for all the Franchisees.			
🔅 OPERATIONS 💙	Campaign Reports	Birthday Report This report lists the Birthday details of all	Franchise Users with respect to Franchisees.			
园 тне нив 🗸 🗸		Center Detail Reports				
		Center Address Report This report lists Center Address and Center	r Contact Address details for all the Franchise	105.		
💰 ROYALTY MGR 🛛 🗸		Center Summary Report This report displays all the details of a sele	ected Franchisee			
SUPPORT		Activity Reports				
🕿 TRAINING 🗸 🗸		Activity Reports Email Status Report This report displays the status of Emails s	ent out of the System.			
Quick Links Notifications		Contact History Cali Report This report lists Cali details with respect to	a all Franchisees.			×

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.

	ETAILS REPORT Back to Reports 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.

Terminated								
Corporate Locations		Info Mgr > 1	Franchisees > Owners			Log a Call Add Task Sea	rch Locations	٩,
Regional		OWNERS	S DETAILS FOR FRANCHISE	ID : "1046 (ATLANTA S	OUTHEAST)" SHOW	CENTER DETAILS Send Email	Select Action	~
Vorkflows	Addresses							
fulti-Unit / Entity	Promissory Notes		Aaron Dixon	(40.4) F40	Mana Address:	ge Owner Addresses Send Email Type of Ownership: P No F		
DD	Agreement	o	Active User Exists : No	Phone: ^{(404) 549-} 9594 Cell:	174 Elm Street Atlanta Georgia 30301	Owner%:	ciliaina.	0.*
Groups	Center Info			Fax:	Atlanta ocorgia ocoor	Other Locations: 1001 (RESTON), 10014		
asks	Contact History	•	Aaron Russell	Phone:	Address:	Type of Ownership: 💷 No I		0*
alendar	Contract Signing	0	Active User Exists : No	Cell: Fax:		Owner%: Job Title:	Modify View Details	
earch	Customer Complaints	_				Other Locations:	Modify Addr	ess
1ail Merge	Default and	i i	Abigail Delgado Active User Exists : No	Phone: Cell:	Address:	Type of Ownership: W No P Owner%: Job Title:	Send Mail	· · ·
Campaign Center	Termination	0		Fax:		Other Locations:	Delete	
Data Update Requests	Documents	Addresses					Upload Pictu	Address
mport	Employees	No Address	ses Available.				Add Remark	5
xport	Entity Details	Send Emai	il Export to Excel Print					
Reports	Events							
ocal Listings	Financial							
	Guarantors							
🚯 OPERATIONS 🗸 🗸	Insurance							

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.

Workflows	Addresses	OWNER D	ETAILS		Mana	age Owner Addresses Send Email As To Send Email As Bo	Add Owner
Multi-Unit / Entity	Promissory Notes	*	Aaron Dixon	Phone: (404) 549-		Type of Ownership: P No Remarks.	0.
FDD	Agreement	o	Active User Exists : No	9594	174 Elm Street Atlanta Georgia 30301	Owner%: Job Title:	04.00
Groups	Center Info			Fax:		Other Locations:	

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 :	O New Owner Okisting Owners
*Select Owner(s) :	Aaron Russell
Owners	Type & Enter
Aaron Russell	Aaron Knight Ownership Start Date : 09/13/2021
Add	 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.

			Q Type and press ente	r		Recent / Saved S	Searches		?	-	FranConnect A		
Terminated									spe	cifies ierminated Fra	inchisee(s). UL de	notes corporat	e Locatix
Corporate Locations		Address details with Fr	Back to Reports ranchise IDs for all the Frar	chisees							1	Items 1 - 20	0 of 547
Regional	Owner 🔺	Franchise ID				Home	Phone	Phone Extension Fax M	lobile	Email		Other Address	ахрау
Workflows	Aaron					Address		Extension				duress	
Multi-Unit / Entity	Dixon	1001 (RESTON) (Res	ton) 1010 (Herndon West)	1038TR (Center park)						test123@te	st123.com		_
FDD	Aaron					174 Elm Street Atlanta							
Groups	Dixon	1001 (RESTON) (Res	ton) 10014 (Roseville Wes	t) 1046 (Atlanta Southeas)	t)	Georgia USA	(404) 549-9594	4					
Tasks						30301							-
Calendar	Aaron Knight	20200106 (20200106	5)										- 1
Search	Aaron Max	STORE-237 (2298-TH	HE CANNERY) (2298-The Ca	nnery)									
Mail Merge	Aaron	1010 (Herndon West	t) 1046 (Atlanta Southeas)	1) 1101 (Kohl's) 9253 (Roc	kville - Congressional)								
Campaign Center	Russell	1010 (nemuon nesi	o to (reality sources	1101 (10110) 5155 (1100	congressionaly								
Data Update Requests	Aaron Russell	New Jersey location	n (FC)										
Import	Abdul Aziz Keffer	BB-1114 (Alliston)											
Export													
Reports	Abigail Delgado	1046 (Atlanta South	east)										
Local Listings	Abigail Delgado	Wyoming (San Diego	o - 2)										
Quick Links Notifications	Abigail	Montana 001 (Monte	202.001)	_	_	-	-	_	-		-	×	× .

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.

1	A		В	С	D	E	F	
1							Owner	Details Report
2								
3								
4	Count	Ŧ	Owner Name 🚽	Franchise ID	 Home Address 	Phone	Phone Extension	🕆 Fax
5		2	Aaron Dixon	1001 (RESTON) (Reston) 1010 (Herndon West) 1	103			
6		2	Aaron Dixon	1001 (RESTON) (Reston) 10014 (Roseville West)	10174 Elm StreetAtlantaGe	or (404) 549-9594		
7		1	Aaron Knight	20200106 (20200106)				
8		1	Aaron Max	STORE-237 (2298-THE CANNERY) (2298-The Canne	ry)			
9		3	Aaron Russell	1010 (Herndon West) 1101 (Kohl's) 9253 (Rockv	ille			
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 is 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.

		٩	Type and press enter		Recent / Saved Searches		0 🌣 🗗	FranConnect Adm	inistrator 、
🔊 SALES	~	Info Mgr >	Franchisees			L	og a Call Add Task Show Filt	ocations	٩
	~	FRAM	NCHISE LOCATI		ions	Iten	1s 1 - 20 of 403 First Prev 1 2 3 4 Next	Last View Per Page	20 🗸
INFO MGR	^	•	Franchise ID 🔺	Owner	City / State	Phone	Area / Region Area / Region Owner	Opening Date	Action
Dashboard In Development Franchisees			1000 (Reston)	Adam Smith, Bill Brown, Celine H, Jane Franchisee, John Lee	Reston / Virginia	(800) 555-1212	EST	12/01/2019	Q ۲
erminated Corporate Locations Regional			1001 (Belmont Ridges)	Betty Rubble, Jane Franchisee	Ashburn / Virginia	(703) 390-9300	EST	05/01/2020	0.4
/orkflows Iulti-Unit / Entity			1001 (RESTON) (Reston)	Aaron Dixon, Aaron Dixon	Reston / Virginia	(800) 555-1212	EST	12/01/2019	¢ ۷
DD			10014 (Roseville West)	Aaron Dixon	Roseville / California	(866) 959-3743	Area 1	08/17/2019	Q v
Groups			1002 (Atlanta)	Bill Jenkins	Atlanta / Georgia	(800) 555-4848	SEUSA	11/11/2019	<u>ې</u> ب
Tasks ØQuick Links 🕕Notif	fications	0	1003 (Reston South)	Crystal Wade John	Reston / Virginia	(981) 919-1891	Area 1	03/12/2008	***

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.

=	Q Type and press enter Recent / Saved Sec	arches Image: Constraint of the second se
	Info Mgr > Multi-Unit / Entity > Entity	Log a Call Add Task Show Filters Search by Entity Name Q
Dashboard In Development	ENTITY INFO Actions Change to Multi-Unit View	CL denotes Corporate Locations. In Dev Specifies In Development Location. Items 1 - 13 of 13
Franchisees	Entity Name Area / Region Area / Region Owner	
Terminated Corporate Locations	ABC	Aaron Finch Amanda Dallas-1 (Dallas-1) Jacques
Regional	ABC Corp	Aaron Dixon 1001 (RESTON) (Reston)
Workfins	ABC LLC	Sandy Nadia 1001 (Belmont Ridges) USA
Multi-Unit / Entity	ACME Partners	Sharon 10014 (Roseville West) 1039 Reston / Virginia USA (888) 555-1212 Hawkins (Central AR)
Groups Tasks	Carlsbad Entity	Jane Franchisee 1004 (Annandale) Jon Franchisee
Calendar	CK BrandA SS	Charles Kerr 1032 (SE Sandy Spring)
Search	DaBomb Brothers	Mike Store-420 (Farmingdale)
Mail Merge		John 🗧 🗧

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.

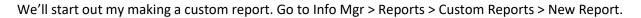
	Info Mgr > Multi-Unit / Entity >	Owners		Log a Call Add Task	Search by Entity Name	۹
	ENTITY NAME: ACME PA	ARTNERS	Sen	d Email Select Franchise	ee 🗸 Select Action	~
Contact History	OWNER DETAILS		Manag	e Owner Addresses Send	l Email As To Send Email As	Bcc Add Owner
Entity Details Agreement	Jim McKenny Franchise: 1039 Active User Exist	Phone: Cell:	Address:	Job Title: Other Locations:	🐺 No Remarks.	Q *
Contract Signing	Aaron Dixon	Phone:(404) 54	9- Address:	Job Title:	🐺 No Remarks.	Q v
Customer Complaints	Franchise: 10014 Active User Exist	9594	174 Elm Street Atlanta Georgia 30301	Other Locations: 1046, 1001 (RESTON)		
Documents		T MAI				
Employees	Addresses No Addresses Available.					Add Addres
Events	Send Email Export to Exce	Print				
Financial						
Guarantors						
Insurance						
Legal Violation						
Lenders						
Marketing						
Mystery Review	L					
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 Name	ne Area / Region	Area / Region Owner	Owner	Current Franchisee(s)
ABC			Aaron Finch Amanda Jacques	Dallas-1 (Dallas-1)
ABC Corp			Aaron Dixon	1001 (RESTON) (Reston)
ABC LLC			Sandy Nadia	1001 (Belmont Ridges)
Ir	nfo Mgr > Franchisees > Entity Details		Log a	Call Add Task Search Locations
		CHISE ID : "1001 (RESTON) (REST	ON)" SHOW CENTER D	ETAILS Send Email Select Action
	ENTITY DETAILS DETAILS FOR FRANC			Enales Schuleman Schuleman
Addresses	ENTITY DETAILS			Edit Delet
Addresses Promissory Notes				Edit Delet
addresses Promissory Notes Agreement	ENTITY DETAILS			
Addresses Promissory Notes Agreement Center Info	ENTITY DETAILS			Edit Delet
Addresses Promissory Notes Agreement Center Info Contact History	ENTITY DETAILS Name : A Area / Region :			Edit Delet
Addresses Promissory Notes Agreement Center Info Contact History Contract Signing	ENTITY DETAILS Name : A Area / Region : Street Address :		Area / Re Stat	Edit Delet gion Owner : Country : te / Province :
Addresses Promissory Notes Agreement Center Info Contact History Contract Signing Customer	ENTITY DETAILS Name : A Area / Region : Street Address : City :		Area / Re Stat	Edit Delet gion Owner : Country :
Addresses Promissory Notes Agreement Center Info Contact History Contract Signing Customer Complaints	ENTITY DETAILS Name : A Area / Region : Street Address : City : Zip / Postal Code : Phone : Fax :		Area / Re Stat Phor	Edit Delet gion Owner : Country : te / Province : he Extension : Mobile :
Addresses Promissory Notes Agreement Center Info Contact History Contract Signing Customer Complaints Default and	ENTITY DETAILS Name : A Area / Region : Street Address : City : Zip / Postal Code : Phone : Fax : Email :		Area / Re Stat Phon Country of Formation	Edit Delet gion Owner : Country : te / Province : te Extension : Mobile : n/Residency : USA
Addresses Promissory Notes Agreement Center Info Contact History Contract Signing Customer Complaints Default and Fermination	ENTITY DETAILS Name : A Area / Region : Street Address : City : City : City : Fax : Fax : City : Cit		Area / Re Stat Phor	Edit Delet gion Owner : Country : te / Province : te Extension : Mobile : n/Residency : USA n/Residency :
Addresses Promissory Notes Agreement Center Info Contact History Contract Signing Customer Complaints Default and Termination	ENTITY DETAILS Name : A Area / Region : Street Address : City : Zip / Postal Code : Phone : Fax : Email :		Area / Re Stat Phon Country of Formation	Edit Delet gion Owner : Country : te / Province : te Extension : Mobile : n/Residency : USA
Addresses Promissory Notes Agreement Center Info Contact History Contract Signing Customer Complaints Default and Fermination	ENTITY DETAILS Name : A Area / Region : Street Address : City : City : City : Fax : Fax : City : Cit		Area / Re Stat Phon Country of Formation	Edit Delet gion Owner : Country : te / Province : te Extension : Mobile : n/Residency : USA n/Residency :

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.



	Q. Type and press enter Recent / Saved Search	nes 😢 🏟 FA FranConnect Administrator 🗸
Search Mail Merge		Log a Call Add Task Search Locations
Campaign Center	Info Mgr Reports	Create New Report
Data Update Requests	Custom Reports	
Import Owner Based Reports	New Report	
Export 🗟 Activity Reports	New Custom Report.	
Reports Reports Reports		88 89
Local Listings	Complaints Development Schedule	*** ***
Reports	entity	Ø8
OPERATIONS	Expiring Insurance	*
📄 📓 Campaign Reports	Franchise Analytics	A &
🔁 THE HUB 🗸 📓 Custom Reports	License Report	*
	New Unit Report	
🗴 ROYALTY MGR 💙	pricing	% 8
	Promissory Notes - Franchisee List (Doug)	* 8
SUPPORT Y	Renewals Due Report	
	Sample Report	8 8
🖻 TRAINING 🛛 🗸	test	8 8
	Unit Insights	×8
SMARTCONNECT	Center Detail Reports	
N BI	Center Address Report This report lists Center Address and Center Contact Address details for all the Franchise	es.
Quick Links Ovtifications	Center Summary Report This report displays all the details of a selected Branchisea	×

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.

	Q. Type and press enter	Recent / Saved Searches	PranConnect	Administrator 🗸
Search Mail Merge	nfo Mgr > Reports > Custom Reports> Report Wizard		Log a Call Add Task Search Locations	٩
	CUSTOM REPORT			
Data Update Requests S	SELECT MODULE			
	 Active, Terminated, Corporate Locations and In Development Franchisees Information Regional Information 			
	Multi-Unit Information			
Reports	Entity Information			
Local Listings	SELECT REPORT TYPE			
	Tabular Report A Tabular Report allows you to view a report which contains only the values of selected fields which match a specific criteria (Date, State, Country etc.).	Aggregation Rep Creates a chart groups formed b criteria.	oort report that shows aggregated statistics (sum, avg, co aased on one data field. It allows data to be filtered by	unt etc) over y various
	Next Cancel			
💰 ROYALTY MGR 🗹				
SUPPORT				
🗢 TRAINING 🛛 🗸				
✓ BI ✓Quick Links ●Notifications				~

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

🕑 De	fine report attributes 2 Define report filters 3 Reports fields to display 4 Save Report
ADD INFORMATION	
Report Type	: Tabular Report
*Report Name	: Important Dates
Accessibility	: Public 🗸
	A list of dates for franchisees, to analyze what needs to be completed.
Description	:
Back Next Cancel	

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.

			Email Center Info	Recent / Saved Searches
Search			Franchisee Type	
Mail Merge		Info Mgr > Reports > Custom Repor	Franchise ID	Log a Call Add Task Search Locations Q
Campaign Center		CUSTOM REPORT	Center Name	Fields marked with * are mandator
Data Update Requests			Area / Region	Filters 3 Reports fields to display 4 Save Report
Import			License Number	
Export		🏷 Note :	License Type	
		These fields can be use e.g. 'Franchisee Type' I	Royalty Reporting Start Date	rminated and Corporate Locations.
Reports			FBC	
Local Listings		ADD A NEW FILTER 🕜	Expected / Opening Date	*
	~	*Select Field to Filter by :	Select 🗸 🗸	60
		CONFIGURE FILTERS 🚱		Drag and drop the Plus icon(\oplus) to change the sequence of Field
艮 ТНЕ НUB	~	Field Name	Criteria	nu® and and the reaction of the angle in a relation of a reac
S ROYALTY MGR	~	Back Next Cancel		
	~	Back Next Cancel		
🗢 TRAINING	~			
SMARTCONNECT				
,∧r Bi				
	\sim			

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	
CONFIGURE	FILLUSFOR	DISPLAT

Field Na	me	Customize Label		
÷	Center Info > Franchise ID	Franchise ID		
Ф	Insurance > Insurance Expiration Date	Insurance Expiration Da		
Φ	Real Estate > Lease Expiration	Lease Expiration		
Φ	Renewal > New Expiration Date	New Expiration Date		
Φ	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.

						P 🗙 🖏 🖏 🕯
REPORT DETAILS	5					
Report Name : In	nportant Dates	Report Type :	Tabular Report			
Created By : Fran	Connect Administrator	Created On : 0	09/13/2021			
Description : A lis	t of dates for franchisees	, to analyze what	needs to be completed.			
Layout : With mer	ged cells for repeated data \bigcirc	Without merged cell	Is		Displaying 1 to 50 of 553 result	s. « < 12345678 >
Franchise ID	Insurance Expiratio	n 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 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						

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.