

# What's New in the Interface?



FranConnect's new Unit Summary Interface is packed with powerful features, and it can be a lot to take in. In this session, we demystify the parts of the new interface and show you how to set it up to make your day-to-day easier.

This document is your guide to implementing the techniques you saw in the Springboard session.

## Contents

What's New in the Interface? .....	1
Set Yourself Up for Convenience .....	2
Set your Unit Summary to be your Home Page .....	2
Set your Filters to reflect your responsibility area .....	2
Configure your Summary Display Columns .....	3
Inside the Unit Record: Set your shortcut tabs .....	3
Store Summary Page?Changes – the Complete List .....	4
#1 Tabs (All, Active, In Dev, Terminated, Archived) corresponding to each type of location available on Opener Story Summary .....	4
#2 Locations moved from Info Mgr to Opener .....	5
#3 Renamed option "Move to Info Mgr" as "Mark As Active" .....	6
#4 Opening Date and Expected Opening Date both are shown for an In Dev location that has been marked as Active from Opener .....	6
#5 In-Dev location that has been marked as Active from the Opener gets moved to the Active tab on the Opener Store Summary page .....	7
#6 Locations that were moved from In Dev (previously in Opener) to Active and then Archived in Opener .....	7
#7 Stopping or starting notifications corresponding to checklist items for a location in the Opener module ...	8
#8 Make locations visible or hide locations from their franchisees .....	9

## Set Yourself Up for Convenience

### Set your Unit Summary to be your Home Page

The screenshot shows the 'Configure Module Startup' page in the FranConnect Administrator. The left sidebar contains a menu with items like COMMAND CENTER, SALES, OPENER, INFO MGR, OPERATIONS, THE HUB, ROYALTY MGR, SUPPORT, TRAINING, and SMARTCONNECT. The main content area is titled 'Options > Configure Module Startup' and includes tabs for 'Change Password', 'Change Profile Info', 'Marketing Activity Email', 'Configure Module Startup', 'Integrator', 'Quick Links', 'Notifications', and 'My Signatures'. The 'Configure Module Startup' tab is active, showing a table with columns 'Default Login Module', 'Module', and 'Default Sub Module'. The 'Opener' module is selected, and its 'Default Sub Module' is set to 'Unit Summary'. A red box highlights the 'Unit Summary' option in the dropdown menu. A red arrow points from the 'Unit Summary' option in the dropdown to the 'Unit Summary' dropdown in the table. Another red arrow points from the 'Configure Module Startup' tab to the table.

Default Login Module	Module	Default Sub Module
<input type="radio"/>	Command Center	N/A
<input type="radio"/>	Sales	Home
<input type="radio"/>	Sales Tabs	Primary Info
<input checked="" type="radio"/>	Opener	Unit Summary
<input type="radio"/>	Info Mgr	Dashboard
<input type="radio"/>	Operations	Visits
<input type="radio"/>	The Hub	Home
<input type="radio"/>	Royalty Mgr	Home
<input type="radio"/>	Support	FAQs

### Set your Filters to reflect your responsibility area

The screenshot shows the 'UNIT SUMMARY' page in the FranConnect Administrator. The left sidebar contains a menu with items like COMMAND CENTER, SALES, OPENER, INFO MGR, OPERATIONS, THE HUB, ROYALTY MGR, and SMARTCONNECT. The main content area is titled 'UNIT SUMMARY' and includes a search bar and a table of units. The 'FRANCHISE' filter is selected, and the 'IN DEVELOPMENT' status is highlighted. A yellow box highlights the 'Filter' icon in the top right corner of the table. A yellow arrow points from the 'Filter' icon to the 'Filter' icon in the table.

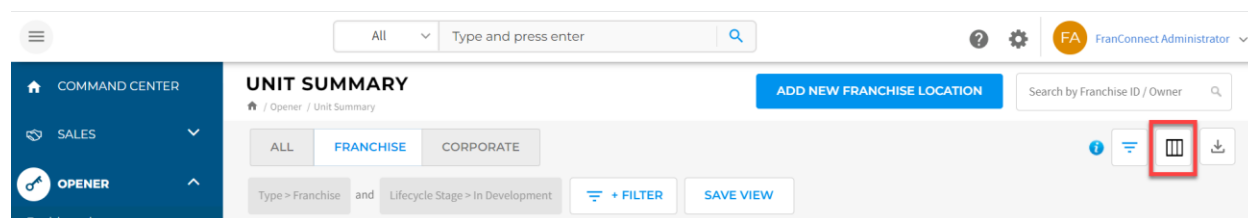
ALL	FRANCHISE	CORPORATE
ALL 571	IN DEVELOPMENT 11	ACTIVE 491
TERMINATED 66	ARCHIVED 3	

FRANCHISE ID	PROJECT START DATE	OWNER	LICENSE TYPE	ENTITY NAME	CITY	STATE / PROVINCE	ACTION
1017 (Santa Ana Sandpointe)	Oct 03, 2019	John Mathew	New License	FranSA Inc.	Hollywood	Florida	...
1029 (Reston Center)	Aug 04, 2019	Saket Kumar	New License	FLX-01	Altoona	Pennsylvania	...
1031 (Oak Park Mall)	Jan 04, 2019	Jane Franchisee(Owner/Operator)	New License	FLX-01	Elizabethtown	Pennsylvania	...
1033 (Belmar)	Jun 17, 2020	Gary Marlin	New License		Front Royal	Virginia	...
1103 (Indiana Mall)	Mar 04, 2020	Gary Moreno		FLX-01	Oakland	Indiana	...

You can keep your filters open, as shown above, or click the Filter icon (shown in yellow above) again to collapse them, giving you more room to work with locations.

## Configure your Summary Display Columns

You can now display the information you need to see by user, right from the Unit Summary page.

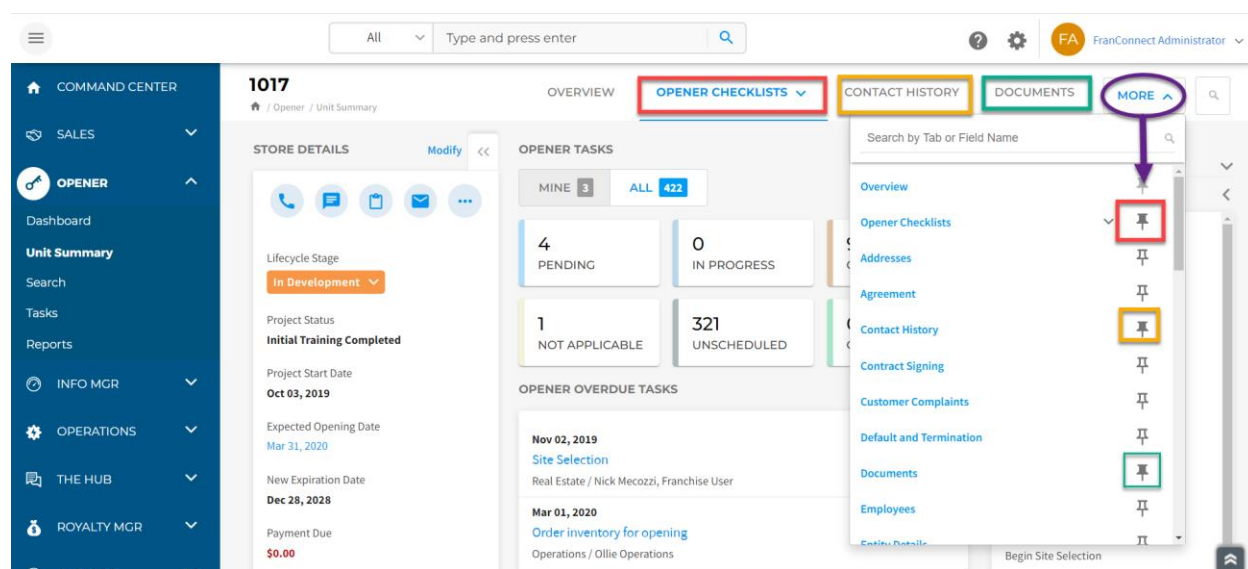


When you choose to configure your summary display columns, you choose fields from the ones your administrator has made available, and move them to the right to include on the location list, or left to take them off of the display. When you're done selecting, choose **Submit** to make your choices permanent.

**ADMINS:** There are two steps for making configurable columns: Summary Display columns in the Admin interface, and the Summary screen dialog. To make columns available to choose in this dialog, go to **Admin > Configuration > Configure Summary Display Columns**. Go to Opener, Unit Summary and from the Action Wheel, choose configure. You'll get a similar left-right dialog to include columns and up-down buttons to re-order how they appear.

## Inside the Unit Record: Set your shortcut tabs

In the new Summary interface, you have simultaneous access to Opener Checklists AND your Information Manager record for the location, so you can enter information about the location without having to jump between modules. You can see the Information Manager tabs by clicking the More button, shown in the purple circle below. Click on the tab name to go to the tab, and enter information directly. If you have tabs that you use frequently, you can pin them (shown by the red, yellow, and green boxes). You may have up to four pinned tabs including the Overview.



## Store Summary PageChanges – the Complete List

### #1 Tabs (All, Active, In Dev, Terminated, Archived) corresponding to each type of location available on Opener Story Summary

Previously, the Opener Store Summary page was not segregated into different tabs corresponding to different types of locations, and it only showed the following types of locations:

1. Locations added through the “Info Mgr > In Development” tab
2. Locations added through the “Opener > Store Summary” tab
3. Locations that were moved to Info Mgr
4. In Development locations that were Terminated
5. Active Locations that were moved to Opener from Info Mgr

With the new change, new tabs have been introduced in the Opener Store Summary page corresponding to different types of locations. Following is a list of those tabs and the kind of locations that appear under each of them:

1. In Dev: the following locations would be shown under this tab
  1. Locations that are added in Opener but not moved to Info Mgr (i.e. not marked as Active)
  2. Sales Leads/Opportunities that are moved to Opener but not moved to Info Mgr (i.e. not marked as Active)
2. Active: the following locations would be shown under this tab
  1. Locations that are Marked as Open/Moved to Info Mgr
  2. Sales Leads/Opportunities that are moved to Info Mgr
  3. Locations that were moved to Info Mgr and then marked as Archived in Opener
3. Terminated: following locations would be shown under this tab
  1. Opener locations that have been terminated
4. Archived: following locations would be shown under this tab
  1. Locations that were archived while they were in the “In Development” stage
5. All: All locations corresponding to each tab would be shown under this tab

FRANCHISE ID	PROJECT START DATE	OWNER	LICENSE TYPE	ENTITY NAME	CITY	STATE / PROVINCE	EXPECTED OPENING DATE	NEXT REMODEL DATE	PHONE	OVERDUE TASKS	AREA / REGION	UNIT TYPE	OPENING STATUS
AB-17 (DLF)	09/15/2021	Upanshu Parashar			Noida	Uttar Pradesh	03/14/2022		7053577745	10	EMEA	Default	
FLX-2 (FLX-2)	11/28/2021	10 Ants Austin LTD			Florida	Florida	12/01/2021		(730) 389-2972	1	AKST	FLX Stores	
89-1011 (Jackson Brewery)	06/19/2020	Jane Franchisee	New License	FLX-01	Madison	Alabama	01/04/2021		(866) 959-3739	91	EST	Internal	
1103 (Indiana Mall)	03/04/2020	Gary Moreno		FLX-01	Oakland	Indiana	08/31/2020		(123) 456-7890	127	MST	Default	
1003 (Belmar)		Gary Martin	New License		Front Royal	Virginia	06/18/2020		(866) 959-3744		EST	Default	
1001 (Oak Park Mall)	01/04/2019	Jane Franchisee	New License	FLX-01	Elizabethown	Pennsylvania	04/30/2020		(866) 959-3739	87	EST	Stand-alone	

Additionally, on the Opener Store Summary page, a user can view the locations of the above tabs segregated, based on their type(Corporate or Franchise) with the help of a toggle button at the top. This toggle button will allow the user to switch views between Corporate and Franchise type locations.

FRANCHISE ID	PROJECT START DATE	OWNER	LICENSE TYPE	ENTITY NAME	CITY	STATE / PROVINCE	EXPECTED OPENING DATE	NEXT REMODEL DATE	PHONE	OVERDUE TASKS	AREA / REGION	UNIT TYPE	OPENING STATUS
AB-17 (DLF)	09/15/2021	Upanshu Parashar			Noida	Uttar Pradesh	03/14/2022		7053577745	10	EMEA	Default	
FLX-2 (FLX-2)	11/28/2021	10 Ants Austin LTD			Florida	Florida	12/01/2021		(730) 389-2972	1	AKST	FLX Stores	

## #2 Locations moved from Info Mgr to Opener

The locations that are moved from Info Mgr to Opener will get enlisted under the Active tab on the Opener Store Summary page, and all the existing checklist tasks can be viewed under the “Opener Checklist” tab-view of that location. Moreover, when a user modifies the details of such a location, they would still be able to add/remove more checklists in the modify page itself. Please note that such a location will continue to be visible in Info Mgr as well.

The screenshot displays the FranConnect interface. The top section shows a table of 'FRANCHISE LOCATIONS' with columns: Franchise ID, Owner, Email, City / State, Area / Region, Area / Region Owner, Opening Date, Brand, Entity Name, and Action. A context menu is open for the location '20201209 NYC', showing options like 'Modify', 'Send Email', 'Log a Task', 'Log a Call', 'View in Map', 'Move to Opener' (highlighted), 'Copy Location', and 'Send Document for E-Signature'. Below the table, the '20201209 NYC' detail view is shown, including 'STORE DETAILS', 'PENDING TASKS' (with a task checklist for '06/07/2021 07:00 PM'), 'CONTACT HISTORY', and 'FRANCHISE OPPORTUNITY DETAILS'.

### #3 Renamed option “Move to Info Mgr” as “Mark As Active”

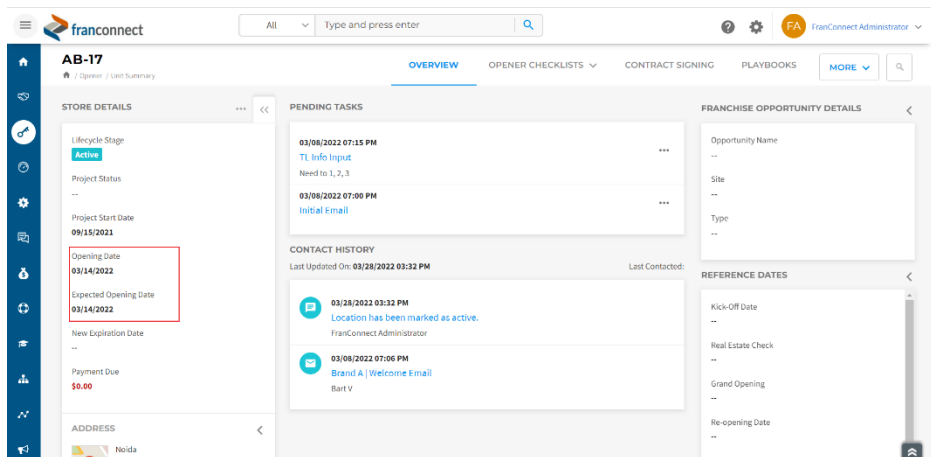
All the In Dev locations under “In Dev” and “All” tabs can now be marked Active by selecting the “Mark As Active” button. Previously, this task could be achieved by selecting the “Move to Info Mgr” button.

The screenshot displays the FranConnect 'UNIT SUMMARY' page. The top section shows a table of units with columns: ID, AREA / REGION, UNIT TYPE, OPENING STATUS, CENTER NAME, PROJECT STATUS, FAX, EMAIL, ZIP / POSTAL CODE, PHONE EXTENSION, MOBILE, AREA / REGION OWNER, REAL ESTATE CHECK, BRAND, and ACTION. A context menu is open for the 'AKSI' unit, showing options like 'Modify', 'Mark as Active' (highlighted), 'Stop Checklist Notifications', 'Hide from Franchisee', and 'Archive'. The table shows units in 'ALL', 'IN DEVELOPMENT', 'ACTIVE', 'TERMINATED', and 'ARCHIVED' states.

### #4 Opening Date and Expected Opening Date both are shown for an In Dev location that has been marked as Active from Opener

Previously, when an In Dev location used to be marked as Active (i.e. moved to Info Mgr), it would get moved into the Active section of Info Mgr, but a copy of such a location used to

remain in Opener. You would've been able to distinguish such locations as they used to appear with two red asterisks next to their names. The Info Mgr copy of such a location used to show only the Opening date, whereas, the Opener copy of such a location would show only the expected opening date. With the new change, both copies of the location (i.e. in Opener and Info Mgr) will show both the expected opening date and the opening date. Also, a user will be able to see the expected opening date and opening date for a location when they edit its details. Moreover, such locations will appear with only one red asterisk next to their names in Opener.



## #5 In-Dev location that has been marked as Active from the Opener gets moved to the Active tab on the Opener Store Summary page

Previously, when an In Dev location used to be moved to Info Mgr (i.e. marked as Active), it would remain visible on the Store Summary page and a user could add checklist tasks to them. With the new change, when an In Dev location is marked as Active from Opener, the location gets moved to the Active tab of Opener, and all the existing checklist tasks can be viewed under the “Opener Checklist” tab view of that location. Moreover, when a user modifies the details of such a location, they would still be able to add/remove more checklists in the modify page itself.

## #6 Locations that were moved from In Dev (previously in Opener) to Active and then Archived in Opener

Previously, when an In Dev location used to be moved to Info Mgr (i.e. marked as Active), one copy of such a location used to remain in Opener and a user could archive such a location. This used to serve the following two use cases:

1. Stopping notifications (for eg. Schedule Start Reminder, Schedule Start, Schedule Completion Reminder, Schedule Completion, and Overdue notifications) corresponding to checklist items of the location's copy in Opener
2. Hiding such a location from their Franchise Users

With the new change, once an In Dev location is marked as Active, it gets moved to the Active tab of Opener, and there is no way to archive such locations (Please note that a user can now archive only In Dev locations). Locations archived in the old Opener will now be visible under the Active tab. In order to achieve the above two points, we have introduced the option to stop/start checklist notifications for a location and to hide/unhide locations from their franchisee users.

## #7 Stopping or starting notifications corresponding to checklist items for a location in the Opener module

Previously, checklist notifications (for eg. Schedule Start Reminder, Schedule Start, Schedule Completion Reminder, Schedule Completion, and Overdue notifications) could be stopped by archiving a location from the old Opener module. With the new change, in order to stop notifications corresponding to checklist items of locations, a user can now go to the action menus of those locations and select “Stop Checklist Notifications”. Similarly, a user can start checklist notifications by selecting “Start Checklist Notifications” from the action menu. Additionally, when a user modifies the details of such locations, they would still be able to add/remove more checklists in the modify page itself.

Please note that only Corporate Users have the privilege to start/stop checklist notifications for a location.

The image displays two screenshots of the FranConnect Opener module, specifically the 'UNIT SUMMARY' page. The page shows a table of franchise locations with columns for RDUE (S), AREA / REGION, UNIT TYPE, OPENING STATUS, CENTER NAME, PROJECT STATUS, FAX, EMAIL, ZIP / POSTAL CODE, PHONE EXTENSION, MOBILE, AREA / REGION OWNER, REAL ESTATE CHECK, BRAND, and ACTION.

In the top screenshot, the 'ACTIVE' tab is selected, and the 'ACTION' menu for a location is open, showing options: 'Modify', 'Stop Checklist Notifications', and 'Hide from Franchisee'. The 'Stop Checklist Notifications' option is highlighted with a red box.

In the bottom screenshot, the 'ACTIVE' tab is selected, and the 'ACTION' menu for a location is open, showing options: 'Modify', 'Start Checklist Notifications', and 'Hide from Franchisee'. The 'Start Checklist Notifications' option is highlighted with a red box.



## #8 Make locations visible or hide locations from their franchisees

Locations that were archived in the old Opener used to get hidden for their Franchisee Users. With the new change, such locations will now appear under the Active tab and will only be visible to Corporate users, which means that they'll already be hidden from their Franchisee Users. If there is a need to make such locations visible for their Franchisee Users, a Corporate User can render them visible by selecting “Make Visible To Franchisees” by going to their action menus. Similarly, locations can again be hidden from their Franchisee Users by selecting “Hide From Franchisee” from their action menus.

Please note that only Corporate Users have the privilege to hide/unhide locations from their Franchisee Users.

The screenshot shows the 'UNIT SUMMARY' page in the FranConnect system. The 'ACTIVE' tab is selected, showing a list of 485 active locations. The table columns include RDUE (S), AREA / REGION, UNIT TYPE, OPENING STATUS, CENTER NAME, PROJECT STATUS, FAX, EMAIL, ZIP / POSTAL CODE, PHONE EXTENSION, MOBILE, AREA / REGION OWNER, REAL ESTATE CHECK, BRAND, and ACTION. A dropdown menu is open for the 'TDT-Casino' location, showing options: 'Modify', 'Start Checklist Notifications', and 'Hide from Franchisee' (highlighted with a red box).

RDUE (S)	AREA / REGION	UNIT TYPE	OPENING STATUS	CENTER NAME	PROJECT STATUS	FAX	EMAIL	ZIP / POSTAL CODE	PHONE EXTENSION	MOBILE	AREA / REGION OWNER	REAL ESTATE CHECK	BRAND	ACTION
PST		Default		TDT-Center-456			support@franconnect.com	95662	123					...
HST		Default		TDT-Laughlin Edgewater Casino			Support@franconnect.com	89009	123					...
HST		Default		TDT-Casino			Support@franconnect.com	10022	123					...
EST	Kiosk	On Schedule		TDT-WLKN			Support@franconnect.com	L3F4Z1	342		Ashlyn Morris			...
HST		Default		TDT-Mansfield			Support@franconnect.com	63005	123					...
HST		Default		TDT-North Clovis			Support@franconnect.com	30008	123					...
				TDT-Willow										...

The screenshot shows the 'UNIT SUMMARY' page in the FranConnect system. The 'ACTIVE' tab is selected, showing a list of 485 active locations. The table columns include RDUE (S), AREA / REGION, UNIT TYPE, OPENING STATUS, CENTER NAME, PROJECT STATUS, FAX, EMAIL, ZIP / POSTAL CODE, PHONE EXTENSION, MOBILE, AREA / REGION OWNER, REAL ESTATE CHECK, BRAND, and ACTION. A dropdown menu is open for the 'TDT-Casino' location, showing options: 'Modify', 'Start Checklist Notifications', and 'Make Visible to Franchisee' (highlighted with a red box).

RDUE (S)	AREA / REGION	UNIT TYPE	OPENING STATUS	CENTER NAME	PROJECT STATUS	FAX	EMAIL	ZIP / POSTAL CODE	PHONE EXTENSION	MOBILE	AREA / REGION OWNER	REAL ESTATE CHECK	BRAND	ACTION
PST		Default		TDT-Center-456			support@franconnect.com	95662	123					...
HST		Default		TDT-Laughlin Edgewater Casino			Support@franconnect.com	89009	123					...
HST		Default		TDT-Casino			Support@franconnect.com	10022	123					...
EST	Kiosk	On Schedule		TDT-WLKN			Support@franconnect.com	L3F4Z1	342		Ashlyn Morris			...
HST		Default		TDT-Mansfield			Support@franconnect.com	63005	123					...
HST		Default		TDT-North Clovis			Support@franconnect.com	30008	123					...
				TDT-Willow										...