

FranConnect Springboard Series: Opener

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.

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

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Set Yourself Up for Convenience

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Set your Unit Summary to be your Home Page

Set your Filters to reflect your responsibility area

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								Items	1-11 of 11 View Per F	Page 100 🗸

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.

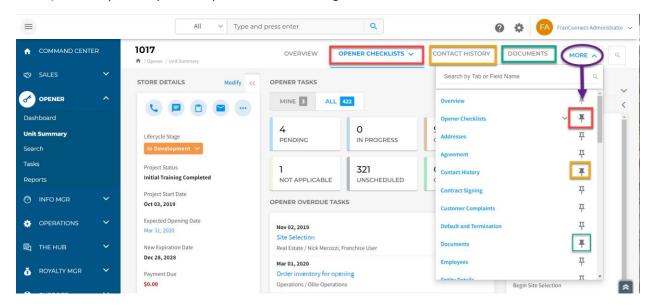
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When you choose to configure your summary display columns, you choose fields from the ones your administrator has made available, and move them to the right to include on the location list, or left to take them off of the display. When you're done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

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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.

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#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.

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#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.

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#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.

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#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.

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#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.

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