

Inviting Franchisees to the Opener

If you’ve been apprehensive about including your franchisees to the opening checklists, this guide should ease your mind. You can give them tools to complete their tasks, and enhance their ability to provide information directly into FranConnect.

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

Contents

Inviting Franchisees to the Opener	1
Exposing Info Manager tabs and Fields to Franchisees	2
Creating Roles	3
Associating Roles with Users.....	4
Assigning Franchise Users to Tasks.....	7

Exposing Info Manager tabs and Fields to Franchisees

This is a three-step process:

1. **Make a Role to hold the permissions.** This is done in **Admin > Roles**. Jump to [Creating Roles](#) for step-by-step instructions.

You can make as many roles as you need to accomplish the different levels of permissions. For example, if the Location Manager can view but not edit fields, and the Owner can edit the fields, you can make one role for each position, and assign the field permissions accordingly. If Area Reps have access to tabs that owners don't, make another role for that. Typical permissions for franchisee users are:

Can View Franchise Type Locations	Can View Opener
Can View In Development Locations	Can Modify Store Information*
Can View Active Locations	Can View Search
Can View Opener	Can View Reports
	Can View Documents

NOTE: It will be tempting to assign the Users to the Role as you save, but a best practice is NOT to assign permission until you have completed the field permission assignments, to prevent users from experiencing constantly-changing pages as you build the permissions.

2. **Assign Field Visibility.** This is done in **Admin > Info Manger > Form Generator**. For detailed instructions on using the Form Generator, please see the *Info Manager Admin Guide*.

Not all fields can be assigned for view in the Store Summary page. Below are the tabs for which field-level security restrictions do not apply. They are hidden from franchisee users.

- Address Tab: already restricted for Franchise User
- Documents Tab: As of now, only opener-specific docs are visible for franchisee users.
- Email Summary Tab: hidden for franchise users.
- Previous Ownership Tab: hidden for franchise users.
- Users Tab: visible if the franchisee user has access to the Unit Admin.
- Contact History: hidden for franchise users.
- Owners Tab: hidden for franchise users.
- Pictures Tab: hidden for franchise users.
- Promissory Note Tab: hidden for franchise users.

3. **Associate Users with Roles.** This is done in **Admin > Roles**. Jump to [Associating Roles with Users](#) for step-by-step instructions.

Users can have multiple roles. When a user has multiple roles, they can see everything any role is allowed to see. For example, if Managers can see A, B, and D and Owners can see A, C and E, if Bob is both a Manager and an Owner, he can see A, B, C, D, and E.

Creating Roles

In FranConnect, Roles help you designate privileges (responsibilities) to users. This ensures that users only have access to those system functions that are necessary for the completion of their job.

1. From Admin, select **Roles**.

2. Click **Add New Role**.

3. Click on the drop down to select the Role type: **Corporate**, **Brand**, **Regional**, **Franchise** Level and then input the Role Name.

- Click on the master check box to select all the privileges in that section or select the individual boxes to be more discerning with privileges.

Role Details

Role Type : Corporate Level ▼

*Role Name :

Choose Privileges for users who will be assigned this role.

No.	Privilege	Description	
Corporate Level Privileges			
1	Can Manage Administer	Grants access to Administer module	<input type="checkbox"/>
	Can Administer Users	Grants access to Admin Users section	<input type="checkbox"/>
	# Can Manage Corporate User	Grants access to Admin Corporate User	<input type="checkbox"/>

- Lastly, select **Yes** or **No** to grant access to Documents and News then click **Submit**.

The content in different sections for a user is controlled by the role(s) assigned. By default, users of this new role will not be able to see the content in the following sections. Click Yes in case you want to change this behaviour.

Documents : ☐ Yes ☒ No

News : ☐ Yes ☒ No

Submit **Cancel**

- After clicking **Submit** you can assign the role to a user who is already in another role, you can select who you want to assign the role to, or select assign later to postpone placing a user into this role.

[Admin](#) > [Users](#) > [Roles](#) > [Modify Role](#) > [Change Users for Role "Accounts Role"](#)

Assign Role

1 Profile → 2 Accessible Content → 3 Role Assignment

Select Users to Assign Role "Accounts Role"

Assign 'Accounts Role' role to all users currently in : FSFOFIM No User Creation ▼

☐ Remove existing users from the selected role?


Assign

OR

Assign 'Accounts Role' role userwise?: **Yes** OR **Assign Later**


Associating Roles with Users

- From the Users section in Admin choose the user type, **Corporate**, **Brand**, **Regional** or **Franchise**.




Users

Administer system users settings – manage users and their login credentials, define users roles and permissions and export users information.




Corporate User

Manage corporate users and their login credentials.




Brand User

Manage Brand User and their login credentials.



Regional User

Manage regional users and their login credentials.



Franchise User

Manage franchise users and their login credentials.

- Click the action wheel beside the user you want to associate with a Role.

Active UsersDeactivated Users

A-C D-F G-I J-L M-O P-R S-U V-X Y-Z All

Country
All Selected
Search user by Name
Search



Active Corporate UsersAdd Corporate User
Items 41 – 60 of 136 | First | Prev | 1 | 2 | 3 | 4 | 5 | 6 | 7 | Next | Last | Show All

<input type="checkbox"/>	Name ▲	City / State	Phone	Phone Extension	Email	Job Title	Mobile	Action
<input type="checkbox"/>	Angelee Brown	Reston / Idaho	(321) 654-3211		test@test.com			
<input type="checkbox"/>	Barry Hyland	City / Alabama	(888) 888-8888		testfran@franconnect.com			

- Click **Modify**.

Active Corporate UsersAdd Corporate User

Items 41 – 60 of 136 | First | Prev | 1 | 2 | 3 | 4 | 5 | 6 | 7 | Next | Last | Show All

<input type="checkbox"/>	Name ▲	City / State	Phone	Phone Extension	Email	Job Title	Mobile	Action
<input type="checkbox"/>	Angelee Brown	Reston / Idaho	(321) 654-3211		test@test.com			 <div> Modify Change Password Deactivate </div>
<input type="checkbox"/>	Barry Hyland	City / Alabama	(888) 888-8888		testfran@franconnect.com			

4. From the Role Dropdown, select the role(s) you want to give the user.

Fields marked with * are mandatory

User Details

*Login ID :

User Type :

Expiration Time (Days) :

*Role :

*Time Zone :

Allow DST : ☒

Personal Details

Job Title :

*First Name :

Address :

*City :

Country :

Zip / Postal Code :

*State / Province :

*Phone1 :

Phone2 :

Fax :

*Email :

IP Address :

Consultant? : ☐

Language :

*Last Name :

Role Selection List:

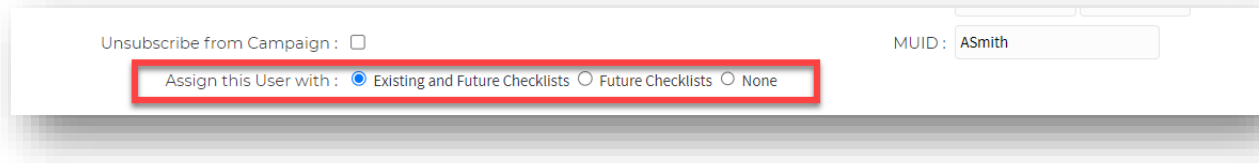
- ☐ Select All
- ☐ Admin Franchisee
- ☐ corp test role
- ☐ Corp Training Manager
- ☐ Corporate Admin - Cannot Create Users
- ☐ Corporate Administrator
- ☐ Corporate no Admin

5. Click **Save**.

Assigning Franchise Users to Checklists

When a location is added to the Opener/Info Manager modules with a checklist, any items that are to be done by the Franchise User will say simply “Franchise User” until you assign a user to the checklist items. To assign a user to the checklist items, go to **Admin > Franchise Users** and select the user who will be responsible for the tasks.

On the user’s record you’ll see the prompt “Assign this User with:”



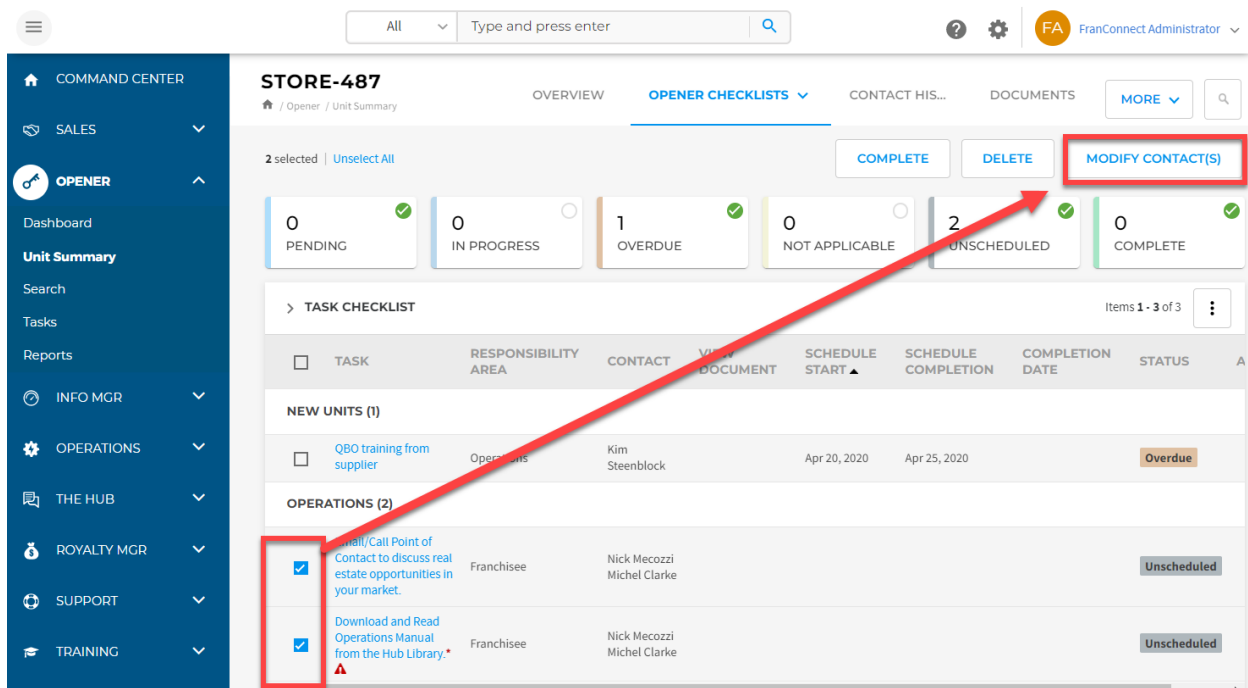
Unsubscribe from Campaign : ☐ MUID : ASmith

Assign this User with : ☒ Existing and Future Checklists ☐ Future Checklists ☐ None

Choose “existing and future checklists” to assign the user to the checklists already associated with the location. Now, when you return to the location’s checklist, the phrase “Franchise User” will be replaced with the name of the user(s) for whom you have checked this option.

Modifying Contacts on Tasks

If one contact rolls off of a project and needs to be replaced, you can select all of the items for which they are assigned, and choose to “Modify Contacts” as shown below.



The screenshot shows the 'STORE-487' interface with the 'OPENER CHECKLISTS' tab selected. A red arrow points from the 'MODIFY CONTACT(S)' button to the 'TASK CHECKLIST' table. The table has columns: TASK, RESPONSIBILITY AREA, CONTACT, SCHEDULE START, SCHEDULE COMPLETION, COMPLETION DATE, and STATUS. It lists tasks under 'NEW UNITS (1)' and 'OPERATIONS (2)'. The 'MODIFY CONTACT(S)' button is highlighted with a red box.

TASK	RESPONSIBILITY AREA	CONTACT	SCHEDULE START	SCHEDULE COMPLETION	COMPLETION DATE	STATUS
NEW UNITS (1)						
QBO training from supplier	Operations	Kim Steenblock	Apr 20, 2020	Apr 25, 2020		Overdue
OPERATIONS (2)						
Call/Call Point of Contact to discuss real estate opportunities in your market.	Franchisee	Nick Mecozzi Michel Clarke				Unscheduled
Download and Read Operations Manual from the Hub Library.	Franchisee	Nick Mecozzi Michel Clarke				Unscheduled

If a contact needs to be removed from ALL locations’ checklists, the change can be made in the template for the checklist in **Admin > Opener > Checklists**, and applied to all existing locations.