

LIVE WEBINAR

**SPRINGBOARD TO SUCCESS:
MANAGING PEOPLE IN
INFORMATION MANAGER**

Thursday, April 27th 2 PM ET | 11 AM PT

franconnect

Your Instructor:
Sherry Stanton
Director,
Center of Excellence

This guide will help you to perform the People clean-up actions demonstrated in this Springboard session.

WHY THE PEOPLE TAB?

Previously, you could see only Multi-Unit owners in one listing. If there were multiple listings of an owner and some or all were single-unit, you couldn't easily find them. Now, you can:

- Easily find a person regardless of how they're entered in the system
- Associate one person to multiple locations, instead of having to add from the location side
- Easily update owner/employee information without navigating to the location
- Clean up multiple records, allowing better franchisee access to their information

Owner vs. Employee vs. User

Owner

- Is listed in the owner tab
- Can be moved to Previous Owners when they transfer the unit
- May or may not have a User record
- Is assigned a MUID (Multi-unit ID) on association with second unit (no user required)

Employee

- Is listed in the Employee tab
- May be copied on transfer but no "Previous Employees" are kept
- May or may not have a User record
- Is assigned a MUID (Multi-unit ID) on association with second unit (no user required)

User

- Must be an owner OR employee, can't mix and match
- Is the place to change the MUID



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Examples of multi-unit employees: services industry, one massage tech/aesthetician works several locations, regional floater.

Anyone NOT an owner who needs access to multiple locations' information.

GOT PEOPLE PROBLEMS? HERE'S HOW TO TROUBLESHOOT

1. **Run User Export.** If you don't have Franchisee users, you can skip this part.
2. **Run Owner Report.** Although you could work entirely from the People tab, this step will save you some switching between screens.
3. **Go to the People Tab and sort by name.** This makes it easy to identify possible duplicates.
4. **Pick the record to be the "one and only".** Priority goes to one with a user record and/or an MUID.
5. **Associate the person with all the units they belong to.** This is easily done via "Manage Associations" in the People tab.
6. **Disassociate the "extra" owner records.** This is best done via the location, since you can't leave a person totally disassociated in the People screen. Click on each location and remove the owner who no longer belongs. If they had a user record, it will disappear when they're no longer associated with any locations.



Over the next few pages, we'll take you screen by screen through this process.

The screenshot shows a Franchise System interface with a sidebar on the left containing navigation options like 'PEOPLE', 'REPORTS', and 'SETTINGS'. The main area displays a table of people with columns for 'PEOPLE', 'USER TYPE', 'CURRENT FRANCHISE(S)', 'ENTITY NAME', 'AREA / REGION', 'AREA / REGION OWNER', 'MUID', and 'CITY'. A red box highlights a specific record for Aaron Dixon, who is a single-unit owner for the entity 'FLX-FL Street (FLX-FL Street)' in Area 1. The record shows a MUID of 'Saket123' and a city of 'Hendon'.

Meet Aaron Dixon. He has four People records, two users, two MUIDs (only one of which is associated with a user), and 10 locations. He's about as messed up as a record gets. So how do we straighten him out?

1. Choose a record to be the main ID.
 - a. If there's a user record already for one, use that one.
 - b. If there's a MUID record, use that one.

In this case we have two records with users attached – a MUID record for Saket123, and a single-unit owner for 9117. Let's pick the one that has BOTH a user and a MUID to be our main record.

1. Associate all appropriate records with the main user record. This is where the second list comes in handy, to easily pull the location records without having to jump between screens.
2. Disassociate the others from the units. Do this by removing the second owner record from the location. TIP: Pin "owners" to make it easy to delete the records. TIP: Set "View Per Page" to 100 and save view for a nice medium between too many pages and slow loading time.

We're sorting by first name, then last name, but you may want to run a last name/first name as your final pass – see "Joe" vs "Toe" Decart.

CONSIDERATIONS WHEN CONSOLIDATING PEOPLE RECORDS

If this is the case...	Do this
Is there a user record?	If you're using Franchise Users, consolidate to the owner that has the franchise user record attached.
More than one user record?	Pick one to be the master, and be sure to notify the location owner of their valid credentials. The other user will be removed when you delete the owner record from its last attached location.
Does one or more records have an MUID attached?	Pick the user with the most locations already attached, to save work!
Multiple owners with same name?	Consider altering the last names, e.g. John Smith1, John Smith2

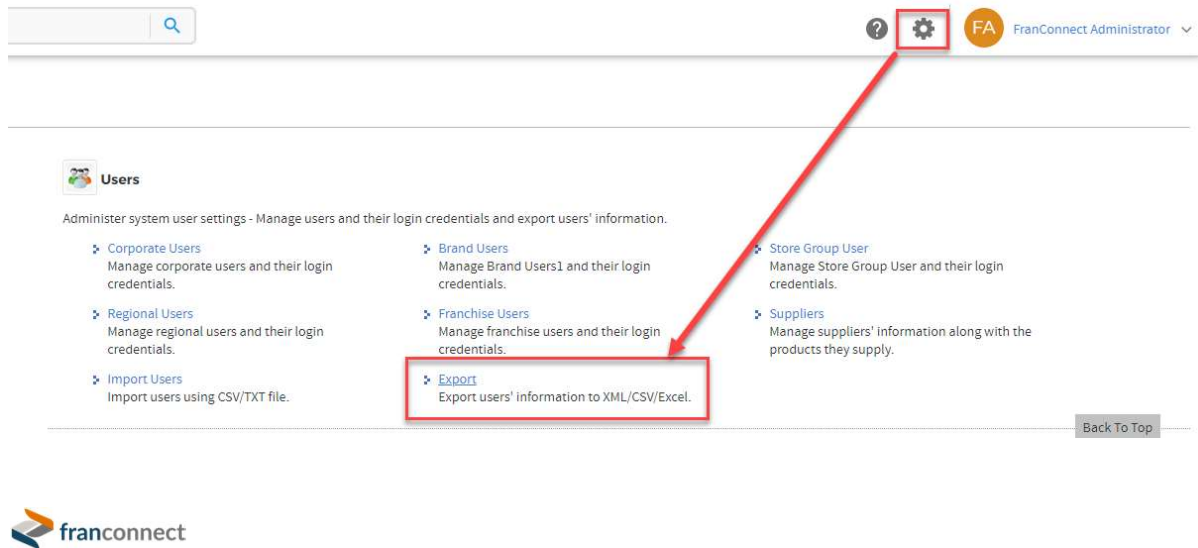


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The main consideration for picking the “main” record is the User record, which the owner or employee may be currently using. We’ll try first to consolidate to that record. If you don’t have franchisee users, this part is easily skipped.

Next most valuable is to choose the owner record with the most locations already attached. Apart from the amount of work to combine records, there’s no downstream consequence to choosing one record over another.

STEP 1 – LIST FRANCHISE USERS



To make our comparison easier, it makes sense to run a couple of reports so we have lists to refer to, rather than jumping from screen to screen in FranConnect.

If you have franchise users, run an export of them so that you can easily match owner records to their user records.

Go to the **Admin** gear, and in the **Users** section, choose **Export**.

Admin > Users > Export

PLEASE ENTER THE SEARCH PARAMETERS

Note: Your export limit is 5000 records. To export all records, please contact your system administrator.

1 Enter Search Criteria → 2 Select Fields → 3 Preview of Data

USER DETAILS

User Login ID:

Status:

User Last Name:

User Type:

User First Name:

☐ Select All

☐ Corporate Users

☐ Brand Users

☐ Store Group User

☒ Franchise Users

☐ Regional Users

[Export As XML](#) [Export As CSV](#) [Export As Excel](#) [Select Fields](#) [View Data](#) [Back](#)

Choose to export Franchise users, and choose to Select Fields.

Admin > Users > Export

PLEASE SELECT THE FIELDS TO BE EXPORTED

1 Enter Search Criteria → 2 Select Fields → 3 Preview of Data

PRIMARY INFORMATION(S)

<input type="checkbox"/> User Details	<input type="checkbox"/> Personal Details
<input type="checkbox"/> User Login ID	<input checked="" type="checkbox"/> Franchise ID
<input checked="" type="checkbox"/> User Type	<input type="checkbox"/> Address
<input checked="" type="checkbox"/> User First Name	<input type="checkbox"/> City
<input checked="" type="checkbox"/> User Last Name	<input type="checkbox"/> State / Province
<input type="checkbox"/> Employee No.	<input type="checkbox"/> Country
<input type="checkbox"/> SMS Address	<input type="checkbox"/> Zip / Postal Code
<input type="checkbox"/> Zone Area No.	<input type="checkbox"/> Phone
	<input type="checkbox"/> Phone Extension
	<input type="checkbox"/> Fax
	<input type="checkbox"/> Mobile
	<input type="checkbox"/> Email
	<input checked="" type="checkbox"/> Job Title
	<input type="checkbox"/> Comments

Export As XML Export As CSV **Export As Excel** Back View

You only need a few fields to make the match. We recommend:

User First Name

User Last Name

Franchise ID

Job Title (if you use them)

| SORT BY FIRST NAME, LAST NAME IN SPREADSHEET

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Sort' button in the 'Sort & Filter' group is highlighted with a red box. A 'Sort' dialog box is open, showing the following settings:

- Column: User First Name
- Sort by: User First Name
- Sort On: Cell Values
- Order: A to Z
- Then by: User Last Name
- Sort On: Cell Values
- Order: A to Z

The spreadsheet data is as follows:

	User First Name	User Last Name	Franchise ID / MUID
1	01 Employee	Franchise User	10101
2	10 Ants Austi	LTD	MU
3	Aaron	Dixon	Saket123
4	Aaron	Dixon	5117
5	Aaron	Knight	Aaron Knight
6	adam	sandlars	ada.msandlars
7	Adam	Smith	ASmith
8	Alexa	Joe	AJ
9	Alexa	Sanon	MU_13
10	Amy	Ward	Albany
11	Ange	Boua	1028
12	Ashi	Jonas	1234
13	Ashley	Morris	MU_7
14	Austin	Franchisee	2001
15	Bertha	Freddie	MU_23
16	Bill	Brown	21
17	Bill	Jenkins	Bjenkins

When you have the Excel spreadsheet open, sort the records by First Name, then Last Name to make them easier to match to the **People** Screen.

STEP 2 - REPORT ON OWNERS

Info Mgr > Reports > Custom Reports > owners

Log a Call | Add Task

Search Locations

CUSTOM REPORT

Fields marked with * are mandatory.

Define report attributes Define report filters Reports fields to display 4 Save Report

ADD FIELD TO DISPLAY

*Available Fields to Display:

Select ? GO

CONFIGURE FIELDS FOR DISPLAY

Drag and drop the Plus icon (+) to change the sequence of Fields.

Field Name	Customize Label	Reports Order by
✚ Owners > Owner First Name	Owner First Name	<input checked="" type="checkbox"/> Ascending
✚ Owners > Owner Last Name	Owner Last Name	<input checked="" type="checkbox"/> Ascending
✚ Center Info > Franchise ID	Franchise ID	<input type="checkbox"/> Ascending
✚ Owners > Ownership Start Date	Ownership Start Date	<input type="checkbox"/> Ascending

Back Next Cancel

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Next, make a report on owners and their locations. This gives us an easy reference when associating owners with locations in the People screen.

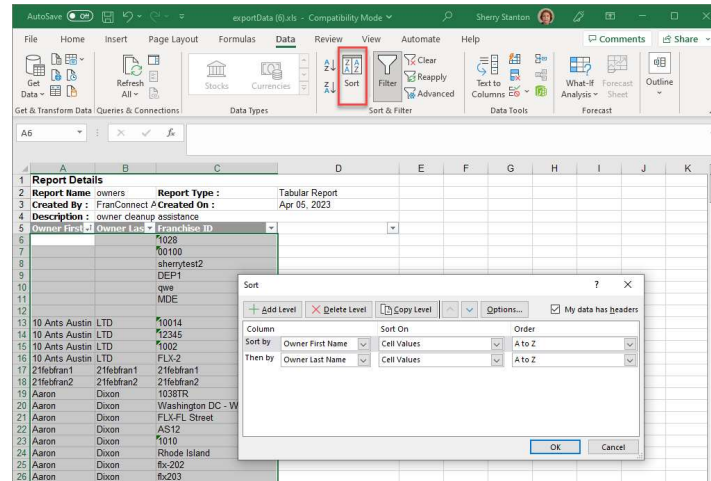
In **Info Manager > Reports > Custom Reports**, make a new report with a name you'll remember.

Define report filters as anything you like; a good default is Franchise ID.

Define fields to display as shown in the illustration.

Choose Next, then export the report to an Excel sheet.

SORT BY FIRST NAME, LAST NAME IN SPREADSHEET



Just as in our User Records, it will be easiest to match our owner report to the People page if it is sorted by First Name, then Last Name.

The screenshot shows the 'PEOPLE' page in the FranConnect Administrator. The page has a sidebar with navigation links like 'OPENER', 'INFO MGR', 'Dashboard', 'Unit Summary', 'People', 'In Development', 'Franchisees', 'Terminated', 'Corporate Locations', 'Regional', 'Workflows', 'Entity', 'Multi-Unit', 'FDD', 'Groups', 'Tasks', 'Calendar', 'Search', 'Mail Merge', 'Campaign Center', 'Data Update Requests', and 'Import'. The main content area displays a table of people. At the top right, there is a search bar and a 'CREATE' button. Below the search bar, there are tabs for 'ALL 660', 'MULTI-UNIT OWNER 34', 'SINGLE-UNIT OWNER 579', 'MULTI-UNIT EMPLOYEE 3', and 'SINGLE-UNIT EMPLOYEE 44'. The table has columns: PEOPLE, USER TYPE, CURRENT FRANCHISEE(S), ENTITY NAME, AREA / REGION, AREA / REGION OWNER, MUID, and ACTION. A red arrow points from the 'SAVE VIEW' button to the 'View Per Page' dropdown menu, which is set to 100. The dropdown menu options are 20, 50, 100, 200, 500, and 1000. The page also shows a filter button and a 'CREATE' button.

Pro Tip: If you'd like to see more than 20 records on a page, set the number to display at the bottom right of the People Page, and click Save View.

Be aware that if you set a high number of records to display, the display will take longer to load...you'll need to strike a balance between how much you'd like to see and how long you're willing to wait for the page to load.

The screenshot displays three data reports side-by-side. The first report, 'User List', shows columns for User First Name, User Last Name, and Franchise ID / MUID. The second report, 'Report Details', shows columns for Report Name, Report Type, Created By, Created On, Description, Owner First Name, Owner Last Name, and Franchise ID. The third report, 'PEOPLE', shows columns for PEOPLE, USER TYPE, CURRENT FRANCHISE(S), ENTITY NAME, AREA / REGION, AREA / REGION OWNER, MUID, and CITY. Red boxes highlight specific records in each report that need to be consolidated.

User First Name	User Last Name	Franchise ID / MUID
01 Employee	Franchise User	10101
10 Ants Austin LTD	MU	
Aaron	Dixon	Saket123
Aaron	Dixon	5117
Aaron	Knight	Aaron Knight
adam	sandlars	ada.msandlars
Adam	Smith	ASmith
Alexa	Joe	AJ
Alexa	Sarmon	MU_13
Amy	Ward	Albany
Ange	Boua	1028
Ashi	Innak	1734
Ashley	Morris	MU_7
Austin	Franchisee	2001
Bertha	Freddie	MU_23
Bill	Brown	71
Bill	Jenkins	BJenkins
Carlton	Trevor	BC-1057
Catherine	Johnston	BB-1109
Celine	H	1000 (RESTON)
Celine	H	Washington
Charles	Kerr	0917
Chris	Gale	FLX-100
Crystal	Wade	store
Daniel	Dunk	Memphis
Daniel	Samperli	BB-1032
David	Pathan	Boston
Dev	Kant	1002
Eber	Edna	BC-1033
Emma	Lee	Dallas
Ernie	Employee	1000
Fran	user	1002
Franchisee	User	1002
Francis	Zeemlow	1047
Frank	Menger	1000

Report Name	Report Type	Created By	Created On	Description	Owner First Name	Owner Last Name	Franchise ID
Report Name	owners	Report Type :					
Created By :	FranConnect	Created On :					
Description :	owner cleanup assistance						
Owner First Name	Owner Last Name	Franchise ID					
1028							
10100							
sherrytes2							
DEP1							
qwe							
MDE							
10 Ants Austin LTD							
10 Ants Austin LTD							
10 Ants Austin LTD							
10 Ants Austin LTD							
10 Ants Austin LTD							
21Hefran1							
21Hefran1							
21Hefran2							
21Hefran2							
Aaron	Dixon	1038TR					
Aaron	Dixon	Washington DC - White House					
Aaron	Dixon	FLX-FL Street					
Aaron	Dixon	AS12					
Aaron	Dixon	1010					
Aaron	Dixon	Rhode Island					
Aaron	Dixon	flx-202					
Aaron	Dixon	flx-203					
Aaron	Dixon	1016-1					
Aaron	Dixon	5117					
Aaron	Dixon	1016-2					
Aaron	Kressin	Santa Barbara					
Aaron	Max	STORE-237 (2298-TH					
Aaron	Russell	1010					
Aaron	Russell	From Opportunity					
Aaron	Russell	1045					
Aaron	Russell	New Jersey location					
Aaron	Russell	1181					
Abdul Aziz	Kaffer	BE-1114					
Abigail	Delgado	Washington DC - White House					
Abigail	Delgado	1046					
Abigail	Delgado	Montana 001					
Abigail	Delgado	Wyoming					
Abigail	Levesque	Rhode Island					
Abigail	Levesque	Store-260					
Abigail	Levesque	Ky10					

PEOPLE	USER TYPE	CURRENT FRANCHISE(S)	ENTITY NAME	AREA / REGION	AREA / REGION OWNER	MUID	CITY
01 Employee	Franchise User	10101 (Hendon West) (CL)	FLX-01	Area 1			Hendon
10 Ants Austin LTD	Owner	1002 (Atlanta) (In Dev)	FLX-01	Area 1			MU
Aaron Dixon	Owner	FLX-FL Street (FLX-FL Street)	FLX-01	Area 1			Saket123
Aaron Dixon	Owner	Rhode Island (20110329_Vermont)	FLX-01	Area 1			
Aaron Dixon	Owner	AS12 (Green)	FLX-01	Area 1			1112
Aaron Dixon	Owner	5117 (Carroll) Local					
Aaron knight	Owner	1016-2 (Haitian)					Aaron knight
Aaron Kressin	Owner	Santa Barbara (Santa Barbara_20110026)	FLX-01	Area 1			
Aaron Russell	Owner	1101 (KARIN)	FLX-01	Area 1			101
Aaron Russell	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1			
Aaron Russell	Owner	From Opportunity (From Opportunity)	ABC Corp	AKST			Jeremy Martin
Aaron Russell	Owner	New Jersey location (JC)	FLX-01	Area 1			
Abdul Aziz Kaffer	Owner	BB-1114 (Atlanta)	FLX-01	Area 1			
Abigail Delgado	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1			
Abigail Delgado	Owner	Washington DC - White House (201104_DC)	FLX-01	Area 1			
Abigail Delgado	Owner	Montana 001 (Montana 001)	FLX-01	Area 1			

Arrange your three reports where they're easy to see. Identify the people records who need to be consolidated, and choose the record that will be the new combined record. In this case, we'll choose the one that has both a user and an MUID.

STEP 3 – ASSOCIATE LOCATIONS WITH THE CORRECT OWNER RECORD

The screenshot shows the 'PEOPLE' management page in the FranConnect system. The page has a sidebar with navigation icons and a top navigation bar with a search bar and user profile. The main content area displays a table of people records, categorized by user type. The 'OWNER' records are highlighted, and the record for Aaron Dixon is selected. The 'Manage Associations' button is visible in the action menu for this record.

PEOPLE	USER TYPE	CURRENT FRANCHISEE(S)	ENTITY NAME	AREA / REGION	AREA / REGION OWNER	MUID	CITY	STATE	COUNTRY	ACTION
01 Employee Franchise User	Employee	10101 (Herndon West) (CL)	FLX-01	Area 1			Herndon	Virginia	USA	...
10 Ants Austin LTD	Owner	1002 (Atlanta) (In Dev) + 3	FLX-01 + 1	Area 1		MU			USA	...
Aaron Dixon	Owner	FLX-FL Street (FLX-FL Street) + 1				Saket123				Modify Manage Associations
Aaron Dixon	Owner	Rhode Island (20210329_Vermont)	FLX-01	Area 1						...
Aaron Dixon	Owner	AS12 (Greens) + 1	FLX-01	Area 1		1212				...
Aaron Dixon	Owner	9117 (Carlsbad Local)	Sample Entity						USA	...

On the record that will be the new single record, choose to **manage associations** from the three button menu at the right of the record.

The screenshot displays a web application interface for managing associations. At the top, there is a search bar with the text "All" and "Type and press enter". Below this, the user profile for "AARON DIXON" is shown, with a breadcrumb trail: "/ Info Mgr / People / Manage Associations".

The main section is titled "> ASSOCIATE UNIT(S)". It contains a dropdown menu labeled "Associate Unit(s) :". The dropdown is open, showing a search input with "AS12" and a magnifying glass icon. Below the search input, there are two options: "Select All" and "AS12", both with checkboxes.

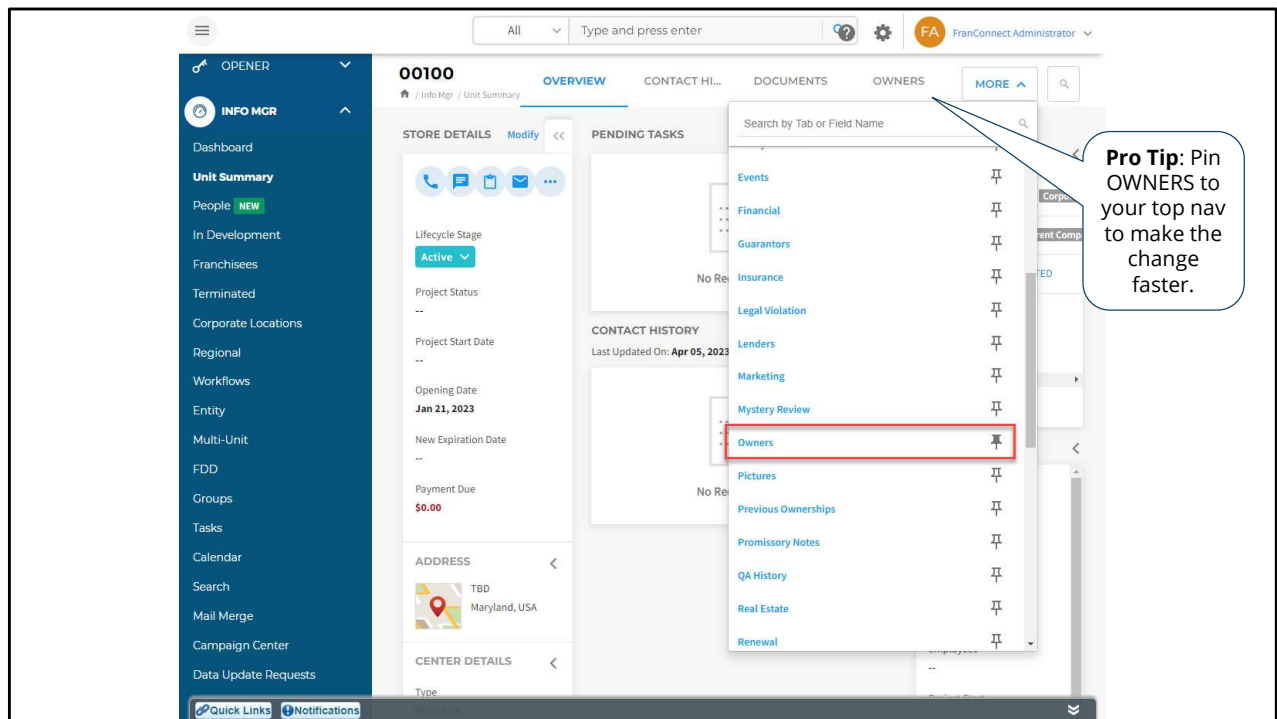
Below the dropdown, there is a section titled "> ASSOCIATED UNIT(S)". It contains a table with two columns: "UNIT(S) NAME" and "TYPE OF OWNERSHIP". The table has three rows:

UNIT(S) NAME	TYPE OF OWNERSHIP
AS12	Select
Washington DC - White House	Select
FLX-FL Street	Select

At the bottom of the screen, there is a table with two columns: "ITEM" and "COUNT".

Choose to associate units with the new single people record. You can type the unit names and click the magnifying glass icon to bring you right to the location to associate.

Keep typing unit IDs and selecting them until you've got your list to associate with your "new" record. When they're complete, click the **Save** button at the bottom right of the screen.



Go to the Owners tab in the location to remove the false owner. When you arrive in the Owners tab, you'll see both the new single record owner and the old duplicate. You can tell them apart because the new single owner will be listed as having other locations.

Continue through the locations of the duplicate records until only one remains.

Pro Tip: Pin the Owners tab to the top of the location record to save navigation to the owner record.