



SPRINGBOARD TO SUCCESS: MANAGING PEOPLE IN INFORMATION MANAGER

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



Your Instructor:
Frank Menger
Sr. Education Consultant



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

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.

User First Name	User Last Name	Franchise ID / MUID
01 Employee	Franchise User	10101
10 Ants Austin LTD	LTD	MU
Aaron	Dixon	Saket123
Aaron	Dixon	9117
Aaron	Knight	Aaron Knight
adam	sandlars	ada.msandlars
Adam	Smith	ASmith
Alexa	Joe	AJ
Alexa	Sanon	MU_13
Amy	Ward	Albany
Ange	Boua	1028
Ashi	Jonas	1234
Ashley	Morris	MU_7
Austin	Franchisee	2001
Bertha	Freddie	MU_23
Bill	Brown	21
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	Samplerfi	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	Zeemplow	1047
Frank	Menger	1000

Report Name	owners	Report Type :
Created By :	FranConnect A	Created On :
Description :	owner cleanup assistance	
Owner First	Owner Las	Franchise ID
		1028
		00100
		sherrytest2
		DEP1
		qwe
		MDE
10 Ants Austin LTD	LTD	10014
10 Ants Austin LTD	LTD	12345
10 Ants Austin LTD	LTD	1002
10 Ants Austin LTD	LTD	FLX-2
21febfran1	21febfran1	21febfran1
21febfran2	21febfran2	21febfran2
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	flx203
Aaron	Dixon	1016-1
Aaron	Dixon	9117
Aaron	Knight	1016-2
Aaron	Kressin	Santa Barbara
Aaron	Max	STORE-237 (2298-TH
Aaron	Russell	1010
Aaron	Russell	From Opportunity
Aaron	Russell	1046
Aaron	Russell	New Jersey location
Aaron	Russell	1101
Abdul Aziz	Keffer	BB-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
Adam	Fract	1039

Franchise System

salesdemostrg1.franconnectdemo.net/fc/control/people-summary?userView=0&cft=bd0f5806-a86e-41e5-a8d1-9...

Bookmarks

Training Demo 1

FranConnect

Personal

2023 Regional Con...

Rehearsal Time Req...

All

Type and press enter

FA FranConnect Adminis

PEOPLE

Info Mgr / People

CREATE

Search People

ALL 662

MULTI-UNIT OWNER 34

SINGLE-UNIT OWNER 581

MULTI-UNIT EMPLOYEE 3

SINGLE-UNIT EMPLOYEE 44

	PEOPLE	USER TYPE	CURRENT FRANCHISEE(S)	ENTITY NAME	AREA / REGION	AREA / REGION OWNER	MUID	CITY	AC
<input type="checkbox"/>	01 Employee Franchise User	Employee	10101 (Herndon West) (CL)	FLX-01	Area 1			Herndon	
<input type="checkbox"/>	10 Ants Austin LTD	Owner	1002 (Atlanta) (In Dev) + 3	FLX-01 + 1	Area 1		MU		
<input type="checkbox"/>	Aaron Dixon	Owner	FLX-FL Street (FLX-FL Street) + 1				Saket123		
<input type="checkbox"/>	Aaron Dixon	Owner	Rhode Island (20210329_Vermont)	FLX-01	Area 1				
<input type="checkbox"/>	Aaron Dixon	Owner	AS12 (Greens) + 1	FLX-01	Area 1		1212		
<input type="checkbox"/>	Aaron Dixon	Owner	9117 (Carisbad Local)	Sample Entity					
<input type="checkbox"/>	Aaron Knight	Owner	1016-2 (Marietta)				Aaron Knight		
<input type="checkbox"/>	Aaron Kressin	Owner	Santa Barbara (Santa Barbara_20210826)	FLX-01	Area 1				
<input type="checkbox"/>	Aaron Russell	Owner	1101 (Kohl's)	FLX-01	Area 1		101		
<input type="checkbox"/>	Aaron Russell	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1				
<input type="checkbox"/>	Aaron Russell	Owner	From Opportunity (From Opportunity)	ABC Corp	AKST	Jeremy Martin + 2			
<input type="checkbox"/>	Aaron Russell	Owner	New Jersey location (FC)	FLX-01	Area 1				
<input type="checkbox"/>	Abdul Aziz Keffer	Owner	BB-1114 (Alliston)	FLX-01	Area 1				
<input type="checkbox"/>	Abigali Delgado	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1				
<input type="checkbox"/>	Abigali Delgado	Owner	Washington DC - White House (2021504_DC)	FLX-01	Area 1				
<input type="checkbox"/>	Abigali Delgado	Owner	Montana 001 (Montana 001)	FLX-01	Area 1				

Items 1 - 20 of 662 | First | Prev | 1 | 2 | 3 | 4 | Next | Last | View Per Page 20

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?	<p>Pick one to be the master, and be sure to notify the location owner of their valid credentials.</p> <p>The other user will be removed when you delete the owner record from its last attached location.</p>
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

STEP 1 – LIST FRANCHISE USERS

FranConnect Administrator ▾

Users

Administer system user settings - Manage users and their login credentials and export users' information.

❖ [Corporate Users](#)

Manage corporate users and their login credentials.

❖ [Regional Users](#)

Manage regional users and their login credentials.

❖ [Import Users](#)

Import users using CSV/TXT file.

❖ [Brand Users](#)

Manage Brand Users1 and their login credentials.

❖ [Franchise Users](#)

Manage franchise users and their login credentials.

❖ [Export](#)

Export users' information to XML/CSV/Excel.

❖ [Store Group User](#)

Manage Store Group User and their login credentials.

❖ [Suppliers](#)

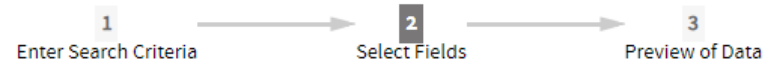
Manage suppliers' information along with the products they supply.

[Back To Top](#)

Admin > Users > Export

PLEASE ENTER THE SEARCH PARAMETERS

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



USER DETAILS

User Login ID :

Status :

User Last Name :

User Type :

User First Name :

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

▾

🔍

- ☐ Select All
- ☐ Corporate Users
- ☐ Brand Users
- ☐ Store Group User
- ☒ Franchise Users
- ☐ Regional Users





All



Type and press enter



[Admin](#) > [Users](#) > **Export**

PLEASE SELECT THE FIELDS TO BE EXPORTED

1

Enter Search Criteria

2

Select Fields

3

Preview of Data

PRIMARY INFORMATION(S)

- ☐ User Details
- ☐ User Login ID
- ☒ User Type
- ☒ User First Name
- ☒ User Last Name
- ☐ Employee No
- ☐ SMS Address
- ☐ Zone Area No

- ☐ Personal Details
- ☒ Franchise ID
- ☐ Address
- ☐ City
- ☐ State / Province
- ☐ Country
- ☐ Zip / Postal Code
- ☐ Phone
- ☐ Phone Extension
- ☐ Fax
- ☐ Mobile
- ☐ Email
- ☒ Job Title
- ☐ Comments

Export As XML

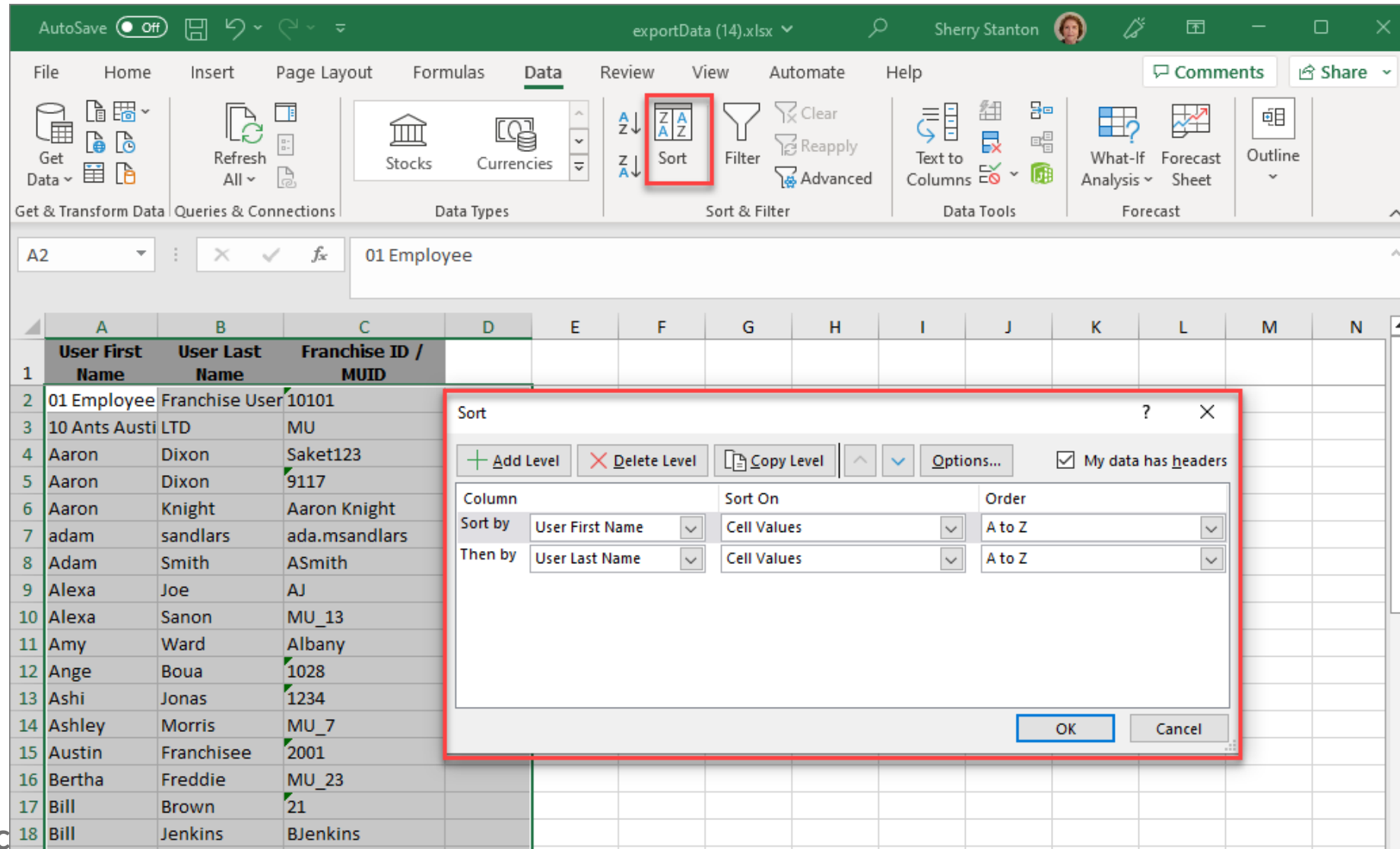
Export As CSV

Export As Excel

Back

View

SORT BY FIRST NAME, LAST NAME IN SPREADSHEET



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

- Sort by:** User First Name
- Sort On:** Cell Values
- Order:** A to Z
- Then by:** User Last Name
- Then On:** Cell Values
- Then Order:** A to Z
- My data has headers:** ☒

The background 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	9117
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

STEP 2 - REPORT ON OWNERS



All

Type and press enter



FranConnect Administrator

- Unit Summary
- People **NEW**
- In Development
- Franchisees
- Terminated
- Corporate Locations
- Regional
- Workflows
- Entity
- Multi-Unit
- FDD
- Groups
- Tasks
- Calendar
- Search
- Mail Merge
- Campaign Center
- Data Update Requests
- Import
- Export
- Reports**

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.

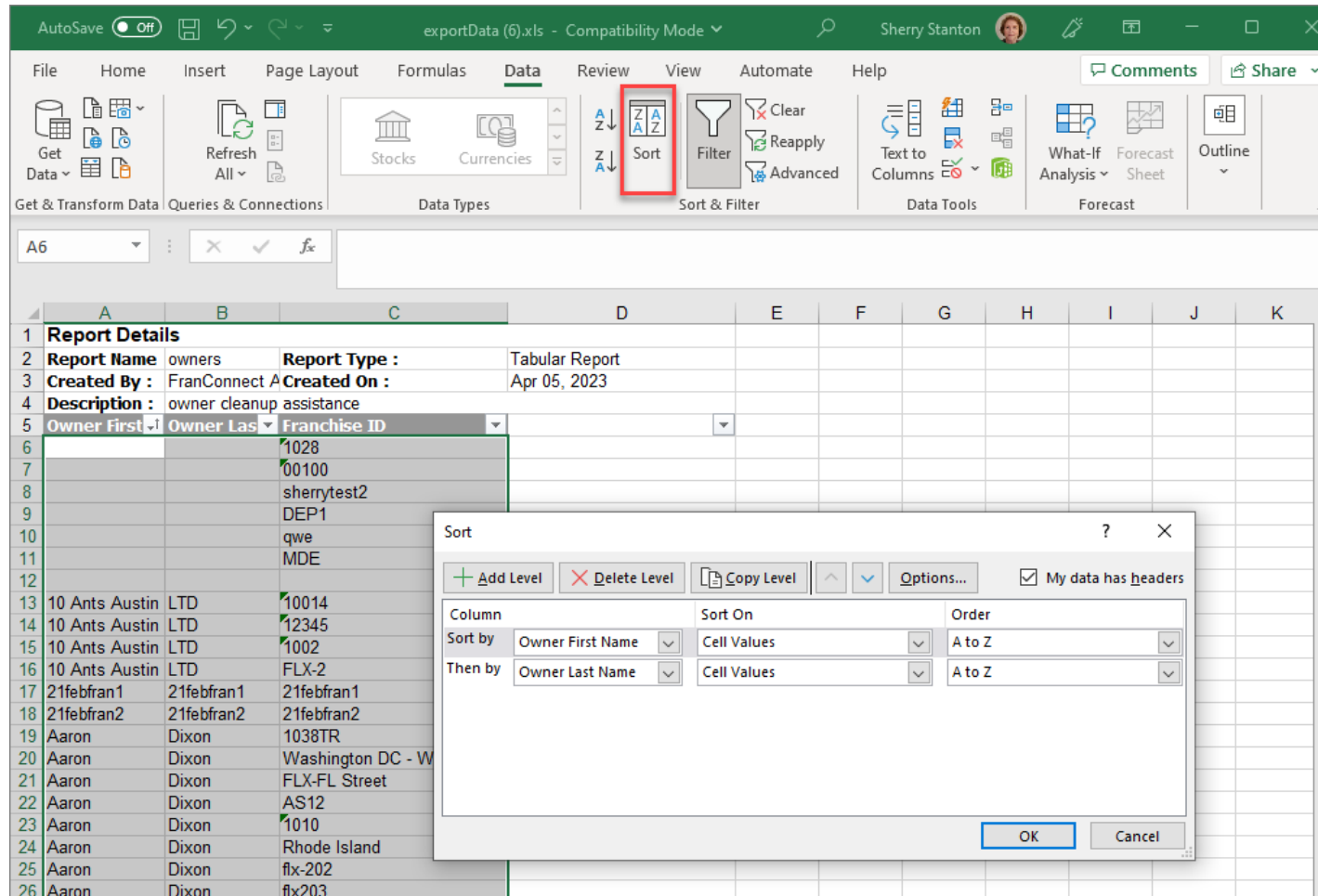
Field Name	Customize Label	Reports Order by
Owners > Owner First Name	Owner First Name	<input checked="" type="checkbox"/> Ascending
Owners > Owner Last Name	Owner Last Name	<input checked="" type="checkbox"/> Ascending
Center Info > Franchise ID	Franchise ID	<input type="checkbox"/> Ascending

Back

Next

Cancel

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. The 'Sort' dialog box is open, showing the following configuration:

- Sort by:** Owner First Name
- Sort On:** Cell Values
- Order:** A to Z
- Then by:** Owner Last Name
- Then On:** Cell Values
- Then Order:** A to Z
- ☒ My data has headers

The spreadsheet data is as follows:

Report Name	owners	Report Type :	Tabular Report
Created By :	FranConnect A	Created On :	Apr 05, 2023
Description :	owner cleanup	assistance	
Owner First	Owner Las	Franchise ID	
		1028	
		00100	
		sherrytest2	
		DEP1	
		qwe	
		MDE	
10 Ants Austin	LTD	10014	
10 Ants Austin	LTD	12345	
10 Ants Austin	LTD	1002	
10 Ants Austin	LTD	FLX-2	
21febfran1	21febfran1	21febfran1	
21febfran2	21febfran2	21febfran2	
Aaron	Dixon	1038TR	
Aaron	Dixon	Washington DC - W	
Aaron	Dixon	FLX-FL Street	
Aaron	Dixon	AS12	
Aaron	Dixon	1010	
Aaron	Dixon	Rhode Island	
Aaron	Dixon	flx-202	
Aaron	Dixon	flx203	



All



Type and press enter



FranConnect Administrator



OPENER



INFO MGR



Dashboard

Unit Summary

People **NEW**

In Development

Franchisees

Terminated

Corporate Locations

Regional

Workflows

Entity

Multi-Unit

FDD

Groups

Tasks

Calendar

Search

Mail Merge

Campaign Center

Data Update Requests

Import

PEOPLE

Home / Info Mgr / People

CREATE



Search People



+ FILTER

SAVE VIEW

ALL

660

MULTI-UNIT OWNER

34

SINGLE-UNIT OWNER

579

MULTI-UNIT EMPLOYEE

3

SINGLE-UNIT EMPLOYEE

44

<input type="checkbox"/>	PEOPLE	USER TYPE	CURRENT FRANCHISEE(S)	ENTITY NAME	AREA / REGION	AREA / REGION OWNER	MUID	ACTION
<input type="checkbox"/>	01 Employee Franchise User	Employee	10101 (Herndon West) (CL)	FLX-01	Area 1			...
<input type="checkbox"/>	10 Ants Austin LTD	Owner	1002 (Atlanta) (In Dev) +3	FLX-01 +1	Area 1		MU	...
<input type="checkbox"/>	Aaron Dixon	Owner	FLX-FL Street (FLX-FL Street) +1				Saket123	...
<input type="checkbox"/>	Aaron Dixon	Owner	Rhode Island (20210329_Vermont)	FLX-01	Area 1			...
<input type="checkbox"/>	Aaron Dixon	Owner	AS12 (Greens) +1	FLX-01	Area 1		1212	...
<input type="checkbox"/>	Aaron Dixon	Owner	9117 (Carlsbad Local)	Sample Entity				...
<input type="checkbox"/>	Aaron Knight	Owner	1016-2 (Marietta)				Aaron Knight	...
<input type="checkbox"/>	Aaron Kressin	Owner	Santa Barbara (Santa Barbara_20210826)	FLX-01	Area 1			...
<input type="checkbox"/>	Aaron Russell	Owner	1101 (Kohl's)	FLX-01	Area 1		101	...
<input type="checkbox"/>	Aaron Russell	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1			...
<input type="checkbox"/>	Aaron Russell	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1			...

Items 1 - 100 of 660 | First | Prev | 1 | 2 | 3 | 4 | Next | Last

View Per Page

100

20
50
100
200
500
1000

User First Name	User Last Name	Franchise ID / MUID
01 Employee	Franchise User	10101
10 Ants Austin LTD	LTD	MU
Aaron	Dixon	Saket123
Aaron	Dixon	9117
Aaron	Knight	Aaron Knight
adam	sandlars	ada.msandlars
Adam	Smith	ASmith
Alexa	Joe	AJ
Alexa	Sanon	MU_13
Amy	Ward	Albany
Ange	Boua	1028
Ashi	Jonas	1234
Ashley	Morris	MU_7
Austin	Franchisee	2001
Bertha	Freddie	MU_23
Bill	Brown	21
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	Samplerfi	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	Zeemplow	1047
Frank	Menger	1000

Report Name	owners	Report Type :
Created By :	FranConnect A	Created On :
Description :	owner cleanup assistance	
Owner First	Owner Las	Franchise ID
		1028
		00100
		sherrytest2
		DEP1
		qwe
		MDE
10 Ants Austin LTD	LTD	10014
10 Ants Austin LTD	LTD	12345
10 Ants Austin LTD	LTD	1002
10 Ants Austin LTD	LTD	FLX-2
21febfran1	21febfran1	21febfran1
21febfran2	21febfran2	21febfran2
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	flx203
Aaron	Dixon	1016-1
Aaron	Dixon	9117
Aaron	Knight	1016-2
Aaron	Kressin	Santa Barbara
Aaron	Max	STORE-237 (2298-TH
Aaron	Russell	1010
Aaron	Russell	From Opportunity
Aaron	Russell	1046
Aaron	Russell	New Jersey location
Aaron	Russell	1101
Abdul Aziz	Keffer	BB-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
Adam	Fract	1039

Franchise System

salesdemostrg1.franconnectdemo.net/fc/control/people-summary?userView=0&cft=bd0f5806-a86e-41e5-a8d1-9...

Bookmarks

Training Demo 1

FranConnect

Personal

2023 Regional Con...

Rehearsal Time Req...

All

Type and press enter

FA FranConnect Adminis

PEOPLE

Info Mgr / People

CREATE

Search People

ALL 662

MULTI-UNIT OWNER 34

SINGLE-UNIT OWNER 581

MULTI-UNIT EMPLOYEE 3

SINGLE-UNIT EMPLOYEE 44

	PEOPLE	USER TYPE	CURRENT FRANCHISEE(S)	ENTITY NAME	AREA / REGION	AREA / REGION OWNER	MUID	CITY	AC
<input type="checkbox"/>	01 Employee Franchise User	Employee	10101 (Herndon West) (CL)	FLX-01	Area 1			Herndon	
<input type="checkbox"/>	10 Ants Austin LTD	Owner	1002 (Atlanta) (In Dev) + 3	FLX-01 + 1	Area 1		MU		
<input type="checkbox"/>	Aaron Dixon	Owner	FLX-FL Street (FLX-FL Street) + 1				Saket123		
<input type="checkbox"/>	Aaron Dixon	Owner	Rhode Island (20210329_Vermont)	FLX-01	Area 1				
<input type="checkbox"/>	Aaron Dixon	Owner	AS12 (Greens) + 1	FLX-01	Area 1		1212		
<input type="checkbox"/>	Aaron Dixon	Owner	9117 (Carisbad Local)	Sample Entity					
<input type="checkbox"/>	Aaron Knight	Owner	1016-2 (Marietta)				Aaron Knight		
<input type="checkbox"/>	Aaron Kressin	Owner	Santa Barbara (Santa Barbara_20210826)	FLX-01	Area 1				
<input type="checkbox"/>	Aaron Russell	Owner	1101 (Kohl's)	FLX-01	Area 1		101		
<input type="checkbox"/>	Aaron Russell	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1				
<input type="checkbox"/>	Aaron Russell	Owner	From Opportunity (From Opportunity)	ABC Corp	AKST	Jeremy Martin + 2			
<input type="checkbox"/>	Aaron Russell	Owner	New Jersey location (FC)	FLX-01	Area 1				
<input type="checkbox"/>	Abdul Aziz Keffer	Owner	BB-1114 (Alliston)	FLX-01	Area 1				
<input type="checkbox"/>	Abigali Delgado	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1				
<input type="checkbox"/>	Abigali Delgado	Owner	Washington DC - White House (2021504_DC)	FLX-01	Area 1				
<input type="checkbox"/>	Abigali Delgado	Owner	Montana 001 (Montana 001)	FLX-01	Area 1				

Items 1 - 20 of 662 | First | Prev | 1 | 2 | 3 | 4 | Next | Last View Per Page 20

STEP 3 – ASSOCIATE LOCATIONS WITH THE CORRECT OWNER RECORD

AllType and press enter

FAFranConnect Administrator

PEOPLE

/ Info Mgr / People

CREATE

Search People

ALL659MULTI-UNIT OWNER34SINGLE-UNIT OWNER578MULTI-UNIT EMPLOYEE3SINGLE-UNIT EMPLOYEE44

	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				... <div>ModifyManage Associations</div>
	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	...



All



Type and press enter



AARON DIXON

[Home](#) / [Info Mgr](#) / [People](#) / [Manage Associations](#)

> ASSOCIATE UNIT(S)

Associate Unit(s) :

Washington DC - White House, AS12



AS12



☒ Select All

☒ AS12

> ASSOCIATED UNIT(S)

UNIT(S) NAME

TYPE OF OWNERSHIP

AS12

Select

Washington DC - White House

Select

▼ FLX-FL Street

Select

ITEM

COUNT

PEOPLE

[Home](#) / [Info Mgr](#) / [People](#)

CREATE ▼

Search People



ALL 659												MULTI-UNIT OWNER 34		SINGLE-UNIT OWNER 578		MULTI-UNIT EMPLOYEE 3		SINGLE-UNIT EMPLOYEE 44	
<input type="checkbox"/>	PEOPLE	USER TYPE	CURRENT FRANCHISEE(S)	ENTITY NAME	AREA / REGION	AREA / REGION OWNER	MUID	CITY	STATE	COUNTRY	ACTION								
<input type="checkbox"/>	01 Employee Franchise User	Employee	10101 (Herndon West) (CL)	FLX-01	Area 1			Herndon	Virginia	USA	...								
<input type="checkbox"/>	10 Ants Austin LTD	Owner	1002 (Atlanta) (In Dev) + 3	FLX-01 + 1	Area 1		MU			USA	...								
<input type="checkbox"/>	Aaron Dixon	Owner	AS12 (Greens) + 3	FLX-01	Area 1		Saket123				...								
<input type="checkbox"/>	Aaron Dixon	Owner	Rhode Island (20210329_Vermont)	FLX-01	Area 1						...								
<input type="checkbox"/>	Aaron Dixon	Owner	AS12 (Greens) + 1	FLX-01	Area 1		1212				...								
<input type="checkbox"/>	Aaron Dixon	Owner	9117 (Carlsbad Local)	Sample Entity						USA	...								
<input type="checkbox"/>	Aaron Knight	Owner	1016-2 (Marietta)				Aaron Knight				...								
<input type="checkbox"/>	Aaron Kressin	Owner	Santa Barbara (Santa Barbara_20210826)	FLX-01	Area 1						...								
<input type="checkbox"/>	Aaron Russell	Owner	1101 (Kohl's)	FLX-01	Area 1		101				...								
<input type="checkbox"/>	Aaron Russell	Owner	1046 (Atlanta Southeast)	FLX-01	Area 1						...								
<input type="checkbox"/>	Aaron Russell	Owner	From Opportunity (From Opportunity)	ABC Corp	AKST	Jeremy Martin + 2					...								
<input type="checkbox"/>	Aaron Russell	Owner	New Jersey location (FC)	FLX-01	Area 1						...								

Items **1 - 100** of 659 | [First](#) | [Prev](#) | **1** | [2](#) | [3](#) | [4](#) | [Next](#) | [Last](#) | View Per Page



All

Type and press enter



FranConnect Administrator

AS12

Info Mgr / Unit Summary

OVERVIEW

CONTACT HISTORY

DOCUMENTS

OWNERS

MORE



STORE DETAILS

Modify



Lifecycle Stage

Active

Project Status

Project Start Date

Apr 19, 2022

Opening Date

Mar 31, 2022

Expected Opening Date

Mar 31, 2022

New Expiration Date

Payment Due

\$0.00

ADDRESS



Alabama
Alabama, USA

OWNER DETAILS



Aaron Dixon

Active User Exists : Yes
qatest@staffex.com

Phone:

Cell:

Fax:

Address:

Type of Ownership:

Owner%:

Job Title: Franchise Development

Other Locations:

*1016-1, *1038TR, FLX-FL Street,
flx203, *1010, Washington DC -
White House

No Remarks.



Aaron Dixon

Active User Exists : No
qatest@staffex.com

Phone:

Cell:

Fax:

Address:

Type of Ownership:

Owner%:

Job Title:

Other Locations:

Washington DC - White House,
*flx-202

No Remarks.

ADDRESSES

No Addresses Available.

Modify

View Details

Modify Address

Send Mail

Delete

Upload Picture

Add Remarks

Quick Links

Notifications



OPENER

INFO MGR

Dashboard

Unit Summary

People NEW

In Development

Franchisees

Terminated

Corporate Locations

Regional

Workflows

Entity

Multi-Unit

FDD

Groups

Tasks

Calendar

Search

Mail Merge

Campaign Center

Data Update Requests

00100

OVERVIEW

CONTACT HI...

DOCUMENTS

OWNERS

MORE

STORE DETAILS

Modify

PENDING TASKS

CONTACT HISTORY

ADDRESS

CENTER DETAILS

- Search by Tab or Field Name
- Events
- Financial
- Guarantors
- Insurance
- Legal Violation
- Lenders
- Marketing
- Mystery Review
- Owners
- Pictures
- Previous Ownerships
- Promissory Notes
- QA History
- Real Estate
- Renewal

Pro Tip: Pin OWNERS to your top nav to make the change faster.



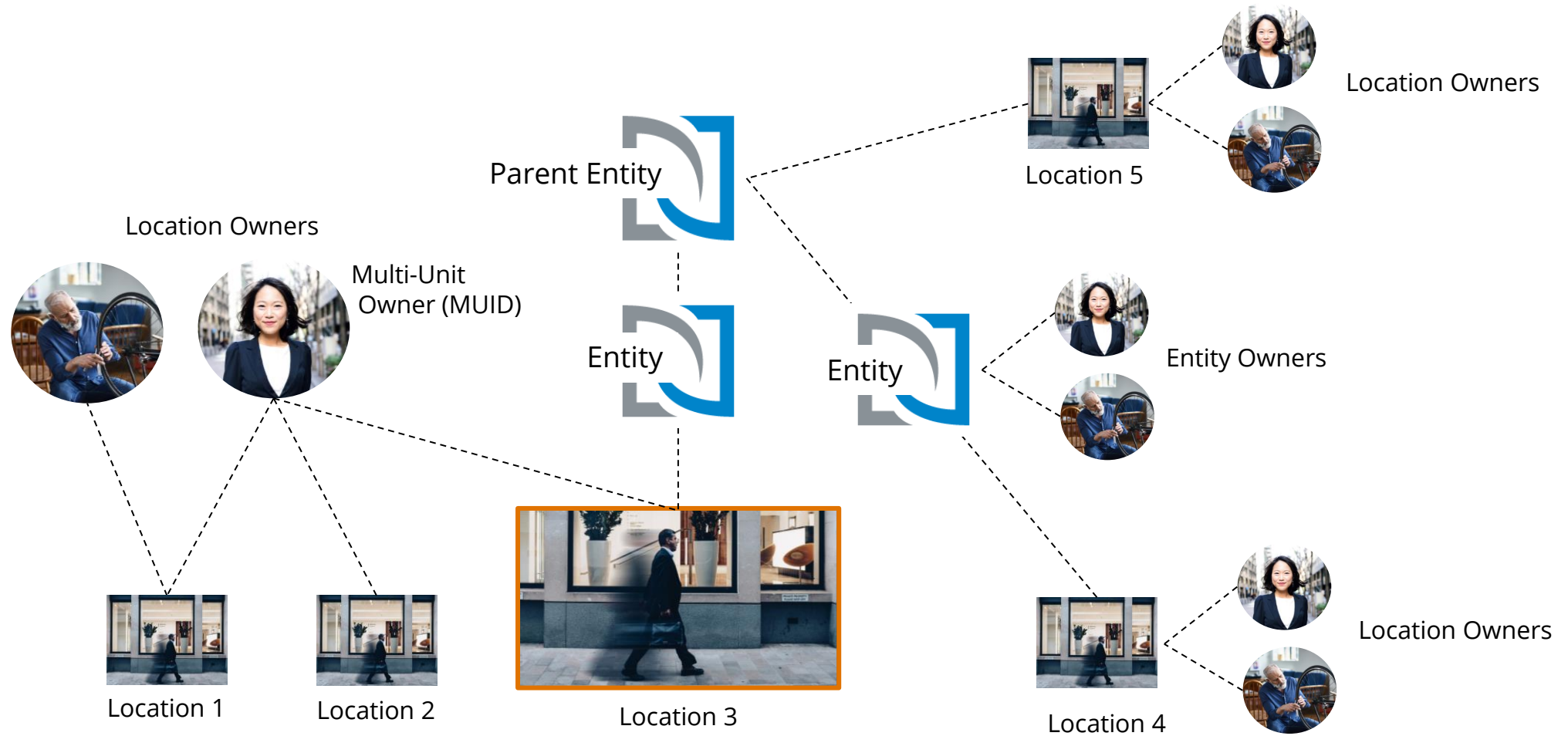
SPRINGBOARD TO SUCCESS: MANAGING ENTITY OWNERS

 Thursday, May 11th 2 PM ET | 11 AM PT

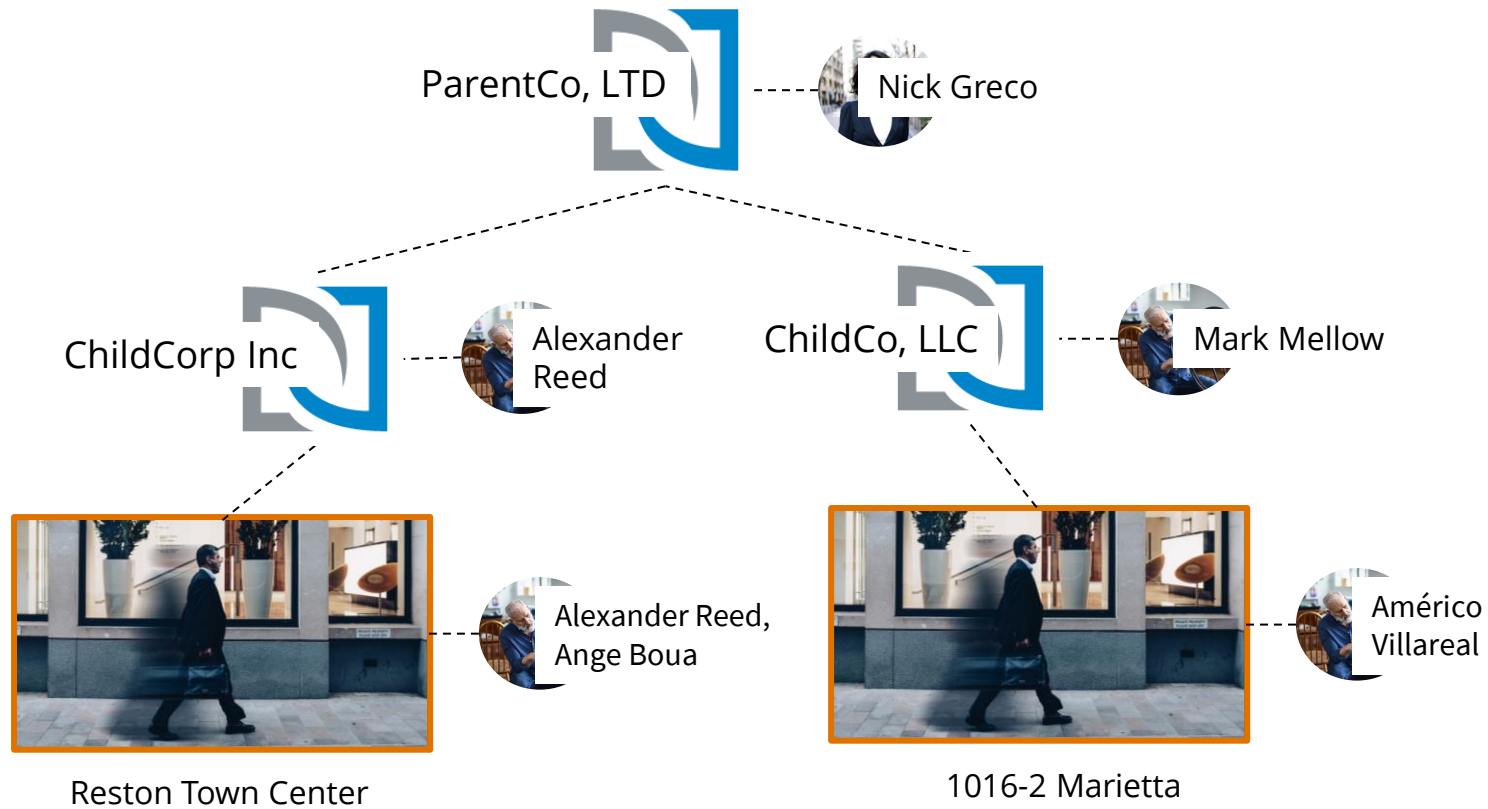


Your Instructor:
Frank Menger
Sr. Education Consultant

ENTITIES, OWNERS, LOCATIONS



ONE EXAMPLE



THE ENTITY VIEW

All ▾ Type and press enter

?

FA FranConnect Administrator ▾

ENTITY

🏠 / Info Mgr / Entity

CREATE COMPANY

child

ALL 2

ACTIVE 2

TERMINATED 0

<input type="checkbox"/>	PARENT ENTITY	ENTITY NAME	ENTITY TYPE	AREA / REGION(S)	AREA / REGION OWNER(S)	OWNER(S)	CURRENT FRANCHISEE(S)	COUNTRY	ACTION
<input type="checkbox"/>	ParentCo, LTD	ChildCo, LLC	General Partnership			Mark mellow	1016-2 (Marietta)		...
<input type="checkbox"/>	ParentCo, LTD	ChildCorp Inc		Northeast	Mehmet Ozarea	Alexander Reed	1028 (Reston Town Center)	USA	...

Items 1 - 2 of 2 View Per Page 20 ▾

THE MULTI-UNIT OWNER VIEW

☰

SALES

OPENER

INFO MGR

Dashboard

Unit Summary

People NEW

In Development

Franchisees

Terminated

Corporate Locations

Regional

Workflows

Entity

Multi-Unit

All

Type and press enter

🔍

?

⚙️

FA FranConnect Administrator

Info Mgr > Multi-Unit

Log a Call | Add Task | Show Filters

Search Multi-Unit

Note : This section displays the list of Owners operating at least two Franchisee(s). CL denotes Corporate Locations. In Dev Specifies In Development Location.

Items 1 - 20 of 59

Go to page

MULTI-UNIT

Actions

<input type="checkbox"/>	Multi-Unit Owner	Entity Name	Area / Region	Area / Region Owner	MUID	Current Franchisee(s)	City / State	Country	Phone
<input type="checkbox"/>	10 Ants Austin LTD	FLX-01 KWI-8, LTD	Area 1		MU	1002 (Atlanta) (In Dev) 10014 (Roseville West) (In Dev) 12345 (New Reston) FLX-2 (FLX-2) (In Dev)		USA	
<input type="checkbox"/>	Aaron Dixon				Saket123	FLX-FL Street (FLX-FL Street) flx203 (flx-202)			
<input type="checkbox"/>	Aaron Dixon	FLX-01	Area 1		1212	AS12 (Greens) Washington DC - White House (2021504_DC)			
<input type="checkbox"/>	Aaron Knight				Aaron Knight	1016-2 (Marietta)			
<input type="checkbox"/>	Aaron Russell	FLX-01	Area 1		101	1101 (Kohl's)			
<input type="checkbox"/>	Adam Smith	ABC Corp Entity FLX-01	Area 1		ASmith	1000 (RESTON) (Reston) (In Dev) Store-487 (DE025 Smyrna Glenwood) (In Dev) Store-419 (Woodinville) Store-491 (Conyers)	Fredericksburg / Virginia	USA	(540) 555-1212

PARENTCO SHOWS BOTH CHILD ENTITIES AND ALL 4 UNITS

AllType and press enter

?⚙️FA FranConnect Administrator

ENTITY NAME: PARENTCO, LTD

Send Email | View Tabs on Top | Send FDD

Contact HistoryEntity DetailsAgreementContract SigningCustomer ComplaintsDocumentsEmployeesEventsFinancialGuarantorsInsuranceLegal ViolationLendersMarketingMystery Review

ENTITY DETAILSEdit

Entity Name : ParentCo, LTD

Street Address :

City :Country :

Zip / Postal Code :State / Province :

Phone :Phone Extension :

Fax :Email : qatest@staffex.com

Country of Formation/Residency : USADate of Formation :

State of Formation/Residency :Taxpayer ID/FEIN :

Entity Type : Corporationcustom text field :

Area / Region(s) :Area / Region Owner(s) :

Formation Document Title :Document : Not Available

Governing Document Title :Document : Not Available

Owner(s) : Nick Greco

Print

ENTITIESAssociate

ChildCorp Inc Child

ChildCo, LLC Child

View All

UNITSAssociate

1002Atlanta2992 Main StAtlanta GeorgiaUSA, 30301

1022 (SALT LAKE CITY W...Salt Lake City West185 Interstate North Pkwy6660 E. Running Deer T...

CHILDCO SHOWS ITS PARENT ENTITY AND ITS UNIT

AllType and press enter

?⚙️FA FranConnect Administrator

Info Mgr > Entity > Entity Details

Search by Entity Name

ENTITY NAME: CHILDCO, LLC

Send Email | View Tabs on Top | Send FDD

Contact HistoryEntity DetailsAgreementContract SigningCustomer ComplaintsDocumentsEmployeesEventsFinancialGuarantorsInsuranceLegal ViolationLenders

ENTITY DETAILSEdit

Entity Name : ChildCo, LLC

Street Address :

City :Country :

Zip / Postal Code :State / Province :

Phone :Phone Extension :

Fax :Email : qatest@staffex.com

Country of Formation/Residency : USADate of Formation :

State of Formation/Residency :Taxpayer ID/FEIN :

Entity Type : General Partnershipcustom text field :

Area / Region(s) :Area / Region Owner(s) :

Formation Document Title :Document : Not Available

Governing Document Title :Document : Not Available

Owner(s) : Mark mellow

Print

SEGMENTS<

No data found

ENTITIES ⓘAssociate<

ParentCo, LTD ParentView All

UNITS ⓘAssociate<

1016-2
Marietta
 Américo Villareal
Allison Park Pennsylvania
USA, 15101

CHILDCORP SHOWS ITS PARENT ENTITY AND ITS UNIT

AllType and press enter

?⚙️FAFranConnect Administrator

Contact HistoryEntity DetailsAgreementContract SigningCustomer ComplaintsDocumentsEmployeesEventsFinancialGuarantorsInsuranceLegal ViolationLendersMarketing

ENTITY NAME: CHILDCORP INC

Send Email | View Tabs on Top | Send FDD

ENTITY DETAILSEdit

Entity Name : ChildCorp Inc

Street Address :

City :Country : USA

Zip / Postal Code :State / Province :

Phone :Phone Extension :

Fax :Email : qatest@staffex.com

Country of Formation/Residency : USADate of Formation :

State of Formation/Residency :Taxpayer ID/FEIN :

Entity Type :custom text field :

Area / Region(s) : NortheastArea / Region Owner(s) : Mehmet Ozarea

Formation Document Title :Document : Not Available

Governing Document Title :Document : Not Available

Owner(s) : Alexander Reed

Print

SEGMENTS<

No data found

ENTITIES ⓘAssociate<

ParentCo, LTD ParentView All

UNITS ⓘAssociate<

1028Reston Town Center11800 Sunrise Valley D...Suite 900Reston VirginiaUSA, 20191

ANOTHER VIEW – ENTITY DETAILS REPORT

All



Type and press enter



FranConnect Administrator

Info Mgr > Reports > Entity Details Report

Log a Call | Add Task

Search Locations



Franchise ID

Owner

Entity Name

Country

State

Brand

All Selected



All Selected



All Selected



Select

All Selected



Select



View Report

Save View

* Specifies Terminated Entity(s). CL denotes Corporate Locations. In Dev Specifies In Development Location. ^ Denotes Archived In Development Locations.

ENTITY DETAILS REPORT

Back to Reports

Lists Entity Details with Owners & Franchise IDs for all the Franchisees



Items 21 - 39 of 39 | First | Prev | 1 | 2 | Next | Last

Entity Name	Current Franchise(s)	Owners	City	Country	State	Email	Phone
FranSA Inc.	1017 (Santa Ana Sandpointe) (In Dev)	John Mathew				qatest@staffex.com	
FXBGStart	1008a (Georgetown)*	Aaron Dixon Aaron Knight Adam Smith John Smith	Fredericksburg	USA	Virginia	qatest@staffex.com	(540) 555-1212
Georgia LLC	Store-56 (Snoqualmie)			USA		qatest@staffex.com	
HW-01			Florida	USA	Florida	qatest@staffex.com	(730) 389-2972
Jenkins Limited	Store-418 (Brookfield Palace)	Bill Jenkins				qatest@staffex.com	
JerCorp	1012 (Jersey City West)					qatest@staffex.com	
KWI-8, LTD	1002 (Atlanta) (In Dev) 1022 (SALT LAKE CITY WEST) (Salt Lake City West)(CL)	Nick Greco Nick Greco				qatest@staffex.com	



SPRINGBOARD TO SUCCESS: STREAMLINING THE USER EXPERIENCE IN INFORMATION MANAGER

 Thursday, May 25th 2 PM ET | 11 AM PT



Your Instructor:
Frank Menger
Manager, Education
Consulting

STORE SUMMARY TAB

- Your one-stop shop for all Franchisee records
- Custom filters let you set your view and save it – customize # of records per page
- Improved custom column headers make the list itself more useful

BONUS: 6 start-up moves to be a FranConnect Ace

STORE SUMMARY REPLACES FOUR SIDE TABS!

UNIT SUMMARY

ADD NEW FRANCHISE LOCATION

Search by Franchise ID / Owner

ALL 678 IN DEVELOPMENT 32 ACTIVE 576 TERMINATED 67 ARCHIVED 3

	FRANCHISE ID	LIFECYCLE STAGE	TYPE	PROJECT START DATE	OWNER	LICE TYPE	ACTION
<input type="checkbox"/>	0001 (Charlotte Old Town)	In Development	Franchise	Mar 14, 2023	Alex William	+ 1	...
<input type="checkbox"/>	00100 (Rockville Town Centre)	In Development	Franchise				...
<input type="checkbox"/>	1000 (SVN Chicago Commercial)	Active	Franchise	Nov 01, 2024	Bill Brown(Owner/Operator)	+ 6	New ...
<input type="checkbox"/>	1000 (RESTON) (Reston)	In Development	Franchise	Nov 01, 2099	Adam Smith	+ 7	Trans Licen ...
<input type="checkbox"/>	1000 Clone which had opener (had opener)	In Development	Franchise		Bill Brown	+ 6	New ...

Items 1 - 100 of 678 | First | Prev | 1 | 2 | 3 | 4 | Next | Last View Per Page 100

ADDITIONAL ADVANTAGES OF STORE SUMMARY

- You no longer need to know the lifecycle stage to find a location – use ALL
- Customize your list view (columns)
- Export the list to Excel – it's a report!
- Filter by any Info Manager field
- Save a different filter in each tab
- Choose how many records to show at a time, and save that preference
- Store Summary is the same view from Opener and Info Manager tabs
 - If you set a filter on one tab, it persists in the other
 - Add a new location from either tab and choose its lifecycle stage on the fly



☰

COMMAND CENTER

SALES

OPENER

INFO MGR

Dashboard

Unit Summary

People NEW

In Development

Franchisees

Terminated

Corporate Locations

Regional

Workflows

Entity

Multi-Unit

FDD

Groups

Tasks

Calendar

Search

Mail Merge

0001

/ Info Mgr / Unit Summary

STORE DETAILS

Modify <<

☎

💬

📋

✉

⋮

Lifecycle Stage

In Development

Project Status

--

Project Start Date

Mar 14, 2023

Expected Opening Date

Dec 31, 2024

New Expiration Date

--

Payment Due

\$0.00

ADDRESS

<

TBD

California, USA

CENTER DETAILS

<

Type

Franchise

OPENER TASKS

PENDING

IN PROGRESS

DUE

0

NOT APPLICABLE

58

UNSC

OPENER OVERDUE TASKS

Apr 07, 2023

Research local tax requirements for all menu items

Legal / Franchise User

Apr 07, 2023

Check for Health Dept approval prior to building permit

Legal / Franchise User

Apr 13, 2023

Initial Floor Plan Created and approved

Construction / Franchise User

Mar 21, 2023

Submit potential site analysis

Site Selection / Franchise User

Mar 28, 2023

Enter into a lease negotiation

Legal / Franchise User

OVERVIEW

OPENER CHECKLISTS

DOCUMENTS

OWNERS

MORE

Search by Tab or Field Name

Overview

Opener Checklists

Addresses

Agreement

Contact History

Contract Signing

Customer Complaints

Default and Termination

Documents

Employees

Entity Details

Events

Financial

Guarantors

Insurance

Project Start

--

Begin Construction

Quick action buttons

Pin frequently-used tabs

Information Tabs

34

TOO MUCH DATA? SEE WHAT YOU CAN HIDE

Export 5 tabs at a time, look for columns with only blanks. These are dispensable fields.

All fields in a tab unused=dispensable tab.

You may know which tabs you won't be using. Hiding those tabs does NOT delete the data, so you can retrieve history even if you hide the tabs.

NEW – FIELD-LEVEL SECURITY

The screenshot displays the FranConnect interface for a user named Adam Smith (AS). The main content area shows the 'STORE-419' details, including 'STORE DETAILS' and 'EMPLOYEE DETAILS'. A dropdown menu is open, showing a list of tabs: Overview, Opener Checklists, Default and Termination, Documents, Employees, Entity Details, QA History, Training, Users, Playbooks, Focus Specific Information, and Pizza stuff. A callout box points to the 'Employees' tab, stating: 'Role-restricted users see fewer tabs and fields, can be restricted to view-only'.

STORE-419
Opener / Unit Summary

OVERVIEW OPENER CHECKLISTS DOCUMENTS EMPLOYEES MORE

STORE DETAILS Modify

Lifecycle Stage
Active

Project Status
--

Project Start Date
Mar 31, 2020

Opening Date
Apr 30, 2020

Expected Opening Date
Apr 30, 2020

New Expiration Date
May 02, 2023

Payment Due
\$1,672,850.00

ADDRESS
648 Elm Street, Elmsford
New York, USA
10523

CENTER DETAILS

EMPLOYEE DETAILS

Employee Start Date : Aug 01, 2022

Other Franchise Location(s) :

EMPLOYEE DETAILS

Employee Start Date :

Other Franchise Location(s) :

Search by Tab or Field Name

- Overview
- Opener Checklists
- Default and Termination
- Documents
- Employees
- Entity Details
- QA History
- Training
- Users
- Playbooks
- Focus Specific Information
- Pizza stuff

Role-restricted users see fewer tabs and fields, can be restricted to view-only

BONUS ONLINE COURSE: 6 START-UP MOVES

6 Start-up moves to make you a FranConnect Ace

17% COMPLETE

Configure your start-up screen ☒

Save your favorite views to filter data ☐

Download the mobile app ☐

Set up email integration ☐

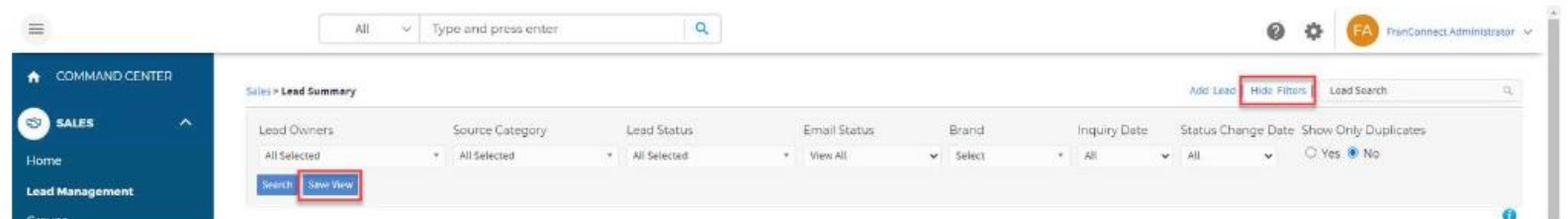
Set up DocuSign integration ☐

Set up Calendly integration ☐

Lesson 2 of 6

Save your favorite views to filter data

If you work from a list screen all day, like a list of leads or a list of locations, you can filter that screen permanently to show just the records you work with, and not the ones that belong to your colleagues.



Sales leads can be filtered to just the ones owned by you, and any combination of category, status, etc.



SPRINGBOARD TO SUCCESS: TARGETED DATA ENTRY FOR TEAMS

 Thursday, June 8th 2 PM ET | 11 AM PT



Your Instructor:
Frank Menger
Manager, Education
Consulting



USE WEB FORMS FOR CORPORATE DATA ENTRY

New Franchise Info

Fields marked with * are mandatory.

Location Details

*Franchise ID :

Fields from Agreement Tab

Date Center Sold :

Effective Date :

Term Expiration Date :

Fields from Contract Signing Tab

*Contract Received Signed :

Promissory Agreement Properly Signed : ☐ Yes ☐ No ☐ NA

Franchise Agreement Properly Signed : ☐ Yes ☐ No

Franchise Agreement Document : No file chosen


GET NOTIFIED WHEN INFORMATION IS SUBMITTED

Info Mgr > Workflows > Modify Workflow

Overview Settings


INSURANCE FORM COMPLETED ✎

EVENT BASED

 TRIGGER

When do you want to execute this workflow?


When a Location fills out the following web form Insurance Information

 CONDITION

Which Locations do you want to execute this workflow on?

☒ Franchisee Type ☐ Locations matching below condition(s)

Select Franchisee Type All In Development

 ACTION

PERFORM FOLLOWING ACTION(S) WHEN THIS WORKFLOW IS EXECUTED

Send Email Insurance form complete! ✎ 🗑

CHOOSE ACTION +



SPRINGBOARD TO SUCCESS: GET READY TO AUTOMATE YOUR FRANCHISEE LIFECYCLE

 Thursday, June 22nd 2 PM ET | 11 AM PT



Your Instructor:
Frank Menger
Manager, Education
Consulting

COMMON PROCESSES FOR AUTOMATION

Renewals

- Insurance Information
- Lease Information
- Franchise agreements

Information updates

- Location contact information
- Updating external certifications
- Periodic data submission (KPIs, etc)

SEE WHAT IMPORTANT DATA IS MISSING

All ▾ Type and press enter 🔍




 FranConnect Administrator

REPORT DETAILS

Report Name : Important Dates for Franchisees Report Type : Tabular Report

Created By : FranConnect Administrator Created On : Jun 03, 2022


Description : Insurance, lease, etc


Layout : ☒ With merged cells for repeated data ☐ Without merged cells








Displaying 1 to 50 of 674 results. << < 1 2 3 4 5 6 7 8 > >>

Franchise ID	Insurance Expiration Date	Term Expiration Date	Lease Expiration	New Expiration Date	Renewal Expiration Date
BB-1026		Jan 04, 2029			
1001	Nov 10, 2020	Sep 01, 2022	Nov 10, 2021	Jun 28, 2019	Jun 28, 2029
Store-56					
sdfsdf					
BB-1137					
Store-38					
BB-1109					
20211027_Charlotte					
BC-1163					
BC-1001					
1013		Feb 27, 2024			
BC-1173					
1029		Dec 30, 2028			

CONSIDER CAMPAIGNING FOR UP-TO-DATE INFORMATION



All ▾ Type and press enter 



[Info Mgr](#) > [Groups](#) > **Configure Smart Group Criteria**

CONFIGURE SMART GROUP CRITERIA

ADD FIELD TO CRITERIA?

*Available Fields to Pick: Insurance Expiration Date ▾ ? **GO**

CONFIGURE CRITERIA ?

Field Name	Criteria
Insurance > Insurance Expiration Date	Is Empty ▾

OK



SPRINGBOARD TO SUCCESS: AUTOMATING REMINDERS

 Thursday, July 6th 2 PM ET | 11 AM PT



Your Instructor:
Frank Menger
Manager, Education
Consulting



COMMON WORKFLOWS FOR ACTIVE LOCATIONS

Name	Updated By	Updated On	Type
New In Development Location Added	FranConnect Administrator	09/20/2022	Standard
Franchise Location Transfer	FranConnect Administrator	08/31/2018	Event
Franchise Location Termination	FranConnect Administrator	08/31/2018	Event
Lease Renewal	FranConnect Administrator	08/31/2018	Date
14 Days Since Franchisee Last Contacted	FranConnect Administrator	08/27/2018	Event
FDD Holding Period Expiration	FranConnect Administrator	08/27/2018	Date
One Year and 6 Month Franchise Renewal Reminders	FranConnect Administrator	08/24/2018	Date
General Liability Insurance Expiration	FranConnect Administrator	08/31/2018	Date
Franchisee Center Information Update	FranConnect Administrator	09/24/2018	Event
Customer Feedback	FranConnect Administrator	09/24/2018	Event
Franchisee Renewal	FranConnect Administrator	09/24/2018	Date

COMMON CAMPAIGNS

[One Year and Six Month Renewal Campaign](#) (Created on : 08/24/2018 11:23 AM)

Template Name	Template Subject
Six Month Franchise Renewal Template	Six months to your renewal! Have you sent us your intent?
One Year Franchise Renewal Template	Your renewal is coming up!

[Franchisee Center Information Update](#) (Created on : 05/30/2018 02:03 PM)

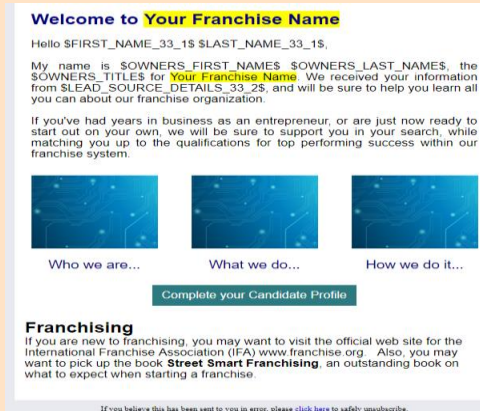
Template Name	Template Subject
Franchisee Center Information Update	Center Information Update

[Insurance Expiration](#) (Created on : 05/30/2018 01:35 PM)

Template Name	Template Subject
General Liability Insurance Expiration	Expired General Liability Insurance

HOW TEMPLATES, CAMPAIGNS AND WORKFLOWS INTERACT

Templates are the formats for emails...



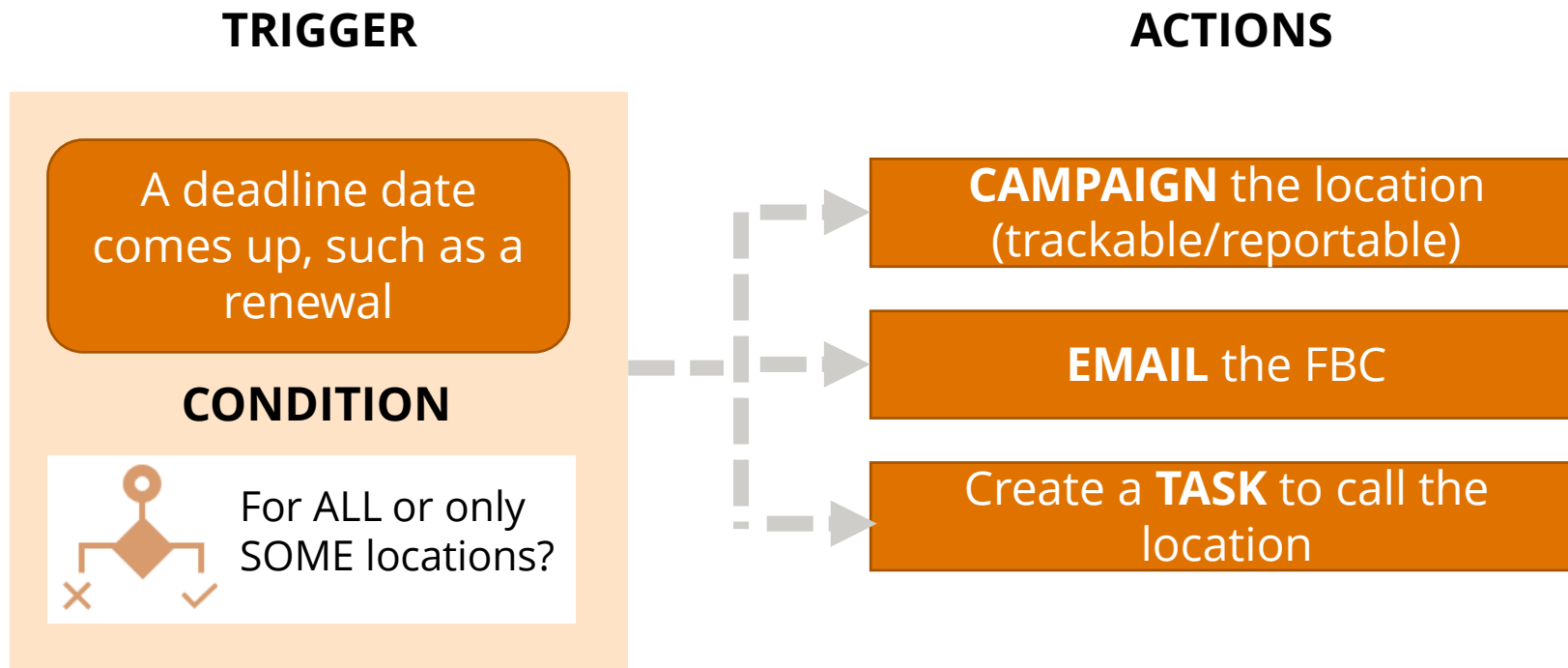
Campaigns automate sending and tracking...



Workflows can send campaigns, assign tasks, and change statuses.

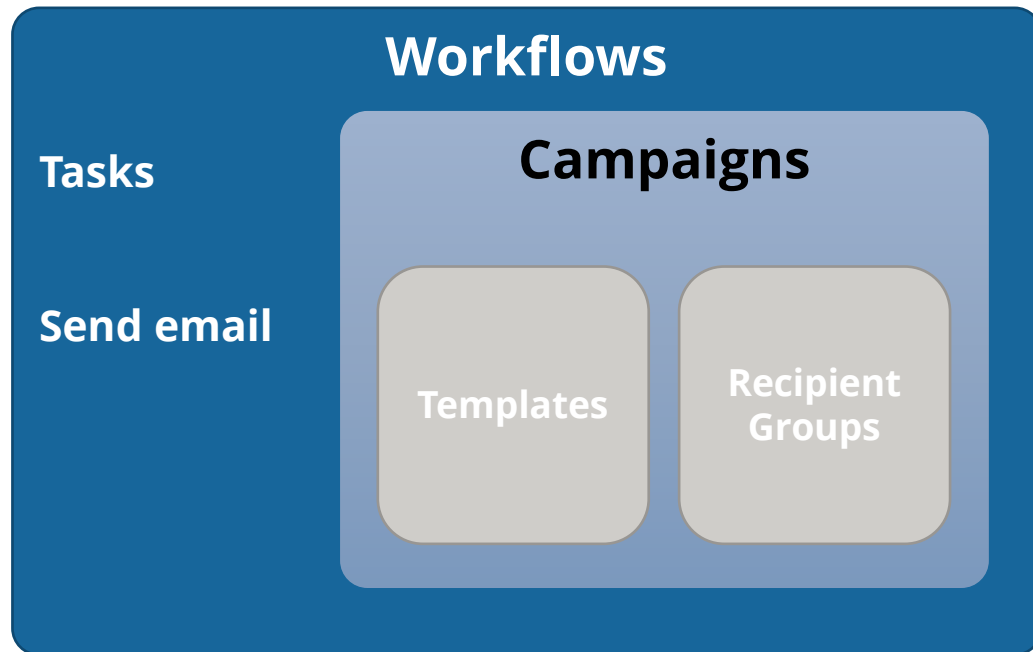


WORKFLOW ELEMENTS



BUILDING A PROCESS WITH FRANCONNECT

Relationship of automation components



Order of building automation components

