Location Reorganization Wizard

A FACT OF LIFE: clients are constantly making changes to their locations. With the Location Reorganization Wizard, you can respond to those changes more quickly than ever by taking out the middle-man (SurfMerchants) and handling the changes yourself.

Without this tool, to change a location you need to:
- request a current location template from SurfMerchants,
- make the changes in Excel,
- upload the template, and
- rely on support staff to make your changes.

With the Location Reorganization Wizard:
- you make the changes quickly and easily.

For example: a client undergoes a re-organization and several locations have been re-assigned to new regions. You can process the reassignments with one pass through the Location Reorganization Wizard – speeding up results for your client. You can also do reassignments to other company levels/subdivisions or location groups. You can accurately update your client during the process, especially when all changes are complete.

GETTING STARTED

Starting on the **Main Administration Page**, use the **Client Survey Menu** to choose the client you want to edit.

Then, in the Clients column, under Manage, choose **Locations** from the drop-down menu, then **click GO**.

Now you're on the **Location Administration Page**. Here, in the Import/Export menu, choose **Location Reorganization Wizard** from the drop-down menu, then **click GO**.

View of Main Administration Page

View of Location Administration Page

Location Reorganization Wizard

Now you're ready to start using the Location Reorganization Wizard.

USING THE LOCATION REORGANIZATION WIZARD

Step 1 – Create a Rollback Set

Before you start selecting the locations that you want to change, you will be asked to **Create a Rollback Set**.

What's a Rollback Set?

A Rollback Set is a snapshot of how your locations are organized at this point in time. It allows you to return to the way things were before you started using the wizard - in case you encounter a problem (for example: if you select the wrong locations or assign them to the wrong place). There is no default setting, you must make a choice.
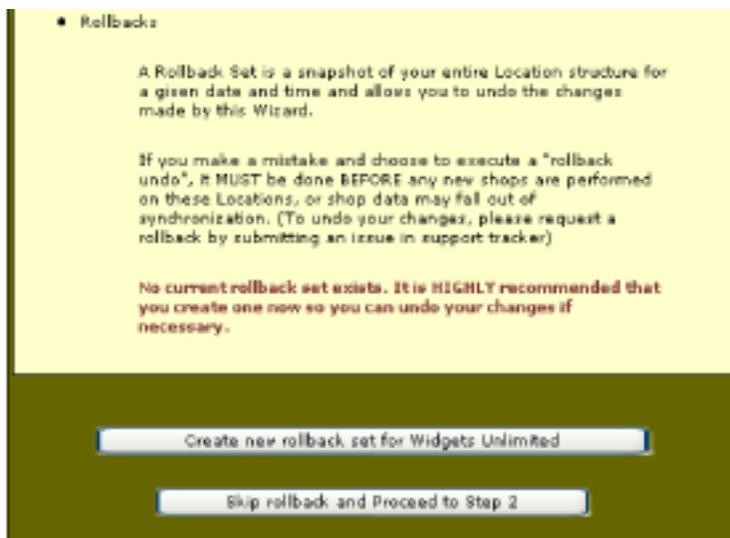

Choose whether to Create a Rollback Set or not here

▷ **Check-off** your rollback choice
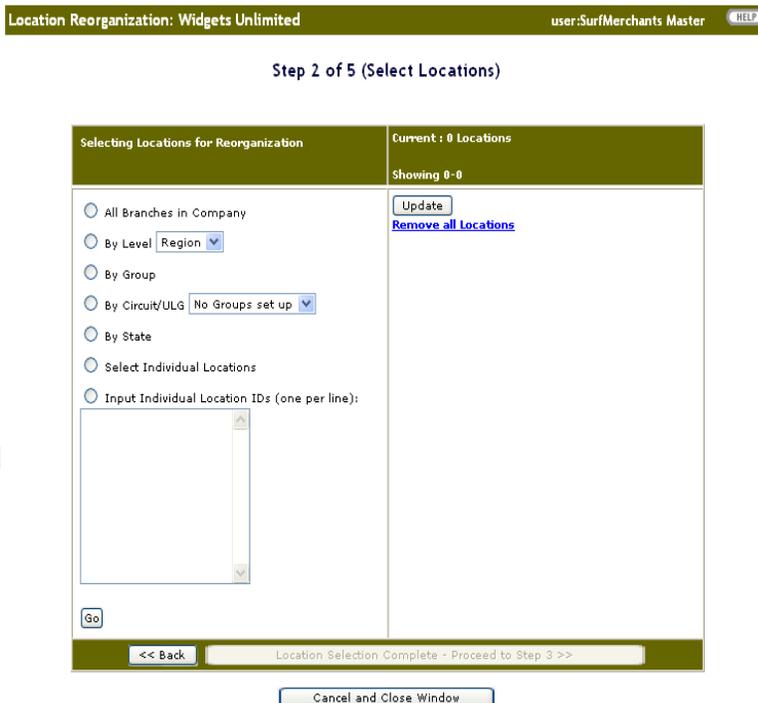▷ Click **Proceed to Step 2**

Reorganization Reminder

You can only change one level or one group at a time. This is important to remember as you select locations. If you have changes to make involving both levels and groups, you must perform the entire process for each separate change (for example: first the levels, then the groups). WARNING: Do not try to combine a level and a group in one change. The wizard may not organize your locations correctly if you do.

Step 2 – Select Locations

You are now on the Select Locations screen. In the left-hand column you are offered several options for choosing the locations to reorganize, including just entering individual Loc IDs into a text box. The individual locations that are selected to change are displayed in the right-hand column.

Location Selection screen

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Refining Your List of Locations

As you build your list, some locations in the Locations List may not qualify for the reorganization. To remove them,

▷ Deselect unqualified locations
▷ Click **Update**

You can add and remove locations until your list is just right.

Starting Over From Here

Clicking on **Remove All Locations** will bring you to the beginning of Step 2 where you can start choosing locations again. Click the **Back** button if you want to start from Step 1.

Location Selection screen with locations selected

When the final list of locations for reorganization is complete,

▷ Click **Proceed to Step 3**

Step 3 – Select Destination

Where are these locations going? Their destination is selected based on whether you are changing a Level or a Group. In the right-hand column you will click either:

• the top radio button to reassign the Level (Region or District) or
• the bottom radio button to reassign the Group or ULGs (Unlimited Location Groups).

Select a Level or Group with the radio buttons on the right

After you **click a radio button**,

▷ **Use the drop-down menu** to select where the locations will move to

Manager Update

Immediately below the Location Reassignment Menu after clicking the Level radio button, you'll see 2 questions regarding the manager of the location being reassigned. Before the reassignment can take place, the Manager Update Utility will ask if these locations should attach to a new manager or leave them with the existing manager. Your choice depends on how your client tracks their shop histories -- by location or by location manager.

The Manager Update Utility screen

- **Track by Location**
  If you select **Attach existing shops to a new manager**, any shops that are not in "locked" status will now be under the new location manager. This way, you can track the shop history of the location.

- **Track by Location Manager**
  If you are tracking manager performance, then you want all of the managers' shops to follow them wherever they work. In this case, you want to **Leave existing shops with original manager**.

Leaving locations with the existing manager is the SASSIE default.

▷ **Click the button** for your choice
▷ Click **Proceed to Step 4**

Step 4 – Review Selections

On the Review Selections screen, you can view the locations that are being reorganized. You have space to leave comments – to remind yourself who authorized the change, why the change happened, etc. If you need to, use the Back to Step 3 button to change any Step 3 answers. When you're done,

The Review Selections Screen

▷ Click **Commit Changes and Proceed to Step 5**

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You are reorganizing locations now!

Step 5 - Verification

On this screen you can view the summary of the changes you have just made. If you have additional locations to change (remember, you're changing levels and groups separately), click **Start Again from Step 2**. When you're finished,

▷ Click **Review New Location Structure**

The last step - Continue Reorganizing or Review Location Structure

All locations, including the newly modified ones, will be displayed. Verify that the newly moved locations are in the correct place. This is the time to decide if you need a Rollback (which was discussed at Step 1).

Mistake Correction with a Rollback

If you've completed all 5 steps, and in Review discover that you have made an error, you can request a Rollback by submitting an issue in the Support Tracker. You have approximately 24-hours since the changes were submitted to get the Rollback to happen. Once the 24-hour window has passed, the mistake cannot be undone through a Rollback. The changes at that point are permanent. After that window of time, use the Location Reorganization Wizard as you normally would to fix any mistakes.