## Creating Restaurant Report Groups in HME CLOUD®

HME CLOUD makes it easier to manage restaurants in your CLOUD account by enabling you to group and organize them into Report Groups. The feature organizes your restaurants into tiered groups to match the structure of your organization. This allows for easier management of reporting and user access.

### **Grouping Restaurants into Report Groups**

- You can create and name groups for your restaurants based on any criteria, such as lane type or region.
- You may also create smaller groupings of restaurants, known as **subgroups**, that belong to larger groups.
- For example, restaurants may be grouped into **Districts** and sub-grouped into **Regions**.
- Report Group structures are limited to 4 levels.

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In this example, we will create a Report Group structure that consists of the following groups and subgroups:

- District Manager
- Area Manager
- Individual Store Managers

#### How to Organize Restaurants into Report Groups

- 1. **Log on** to your HME CLOUD Account.
- Click the SETTINGS link on the main navigation bar, or click the Stores link on the Quick Links section.
   Note: Only Account Owners and users granted permission may create Report Groups.



3. Click on Manage Report Groups to go to the Manage Report Groups page.

MECLOU	D*			WELCOME	DASHBOARD	REPORTS	LEADERB
STORES	USERS ROLES	DISPLAY LOCK DEV	ICE SETTINGS	SETTINGS SNAPSHOTS	APPLY DEVICE SE	TTINGS	
Stores	SEARCH FOR Store #	✓ Q type a St	tore #	Search	Manage Re	eport Groups	2
STORE INFO	ORMATION						
BRAND	STORE #	STORE NAME	STORE ADDRESS	CITY, STATE	LEADERBOAR	D REF	ORT GROUP
HME	6543	Super Sandwich - Vista	123 Main St	Vista, TO	HMEats'	Mig	uel Ramire
НМЕ	012345	Super Sandwich - Bloom	1234 Lily Dw.	Bloom, SI	HME Eats	Sou	ıth
НМЕ	4444	Super Sandwich - Carone	58933 Bonita (	Cle. Carone, PN	HME Eats	Lau	iren Huong
HME	8996	Super Sandwich -	1212 Faraday	Carlsbad, CA	HME Eats		

4. Type in the search field to look for the store name, store number or group name. Select the **Add New Group** button. **Note:** Groups may be divided into **subgroups**.



5. Enter the new store manager or group name in the **Group Name** field, then click **Save**.

In this example, **Store Managers** are the base tier of the hierarchy, managing individual stores. A green success notification will appear.

Note: Repeat this process until all the individual Store Managers are assigned to their corresponding stores.



From the Groups/ Stores list, select the store(s) to asign to the Store Manager. Then click Move.
 Note: The selected store will be highlighted in blue. Make sure only the stores you want to group are selected.

	50					WELCOME	DASHDUARD	KEP ORTS	LEADERBOARDS	Move
TORES	USERS	ROLES	DISPLAY	LOCK DEVICE SET	TINGS SET	TTINGS SNAPSHOTS	APPLY DEVICE SE	TTINGS		
Mana	ge Repo	rt Grou	ps							
Q Тур	e a store name	, store numl	oer # or grou	p name		Edit Group	Add Group	Rem	Nove	
	Juniper Jone	s								
m	Super Sandwi	ch - La Palm	- 00005							
R	Super Sandwi	ch - Bloom -	012345							
Ħ	Super Sandwi	ch - Beacon -	073							
Ē	Super Sandwi	ch - Carone -	4444							
Ħ	Super Sandwi	ch - Whiptail	- 4722							
雷	Super Sandwi	ch - Vista - 6	543							

- 7. The **Move** box will open. Begin typing the name of the Store Manager or Group where you would like to assign the restaurant. A drop down list of available group names will pop up. Make your selection from the list.
- 8. Review your selection then, click **Move**. A green success notification will appear.

STORES USERS ROLES DISPL	Move	>	<
Manage Report Groups	Selected	То	
Q Type a store name, store number # or	छि Super Sandwich - La Palm - 00005	Q iun Suggestions	EXPORT Export in CSV V Export
郡 Super Sandwich - La Palm - 00005 郡 Super Sandwich - Beacon - 073 郡 Super Sandwich - Carone - 4444		Juniper Jones (Store Manager)	IMPORT Choose file
謂 Super Sandwich - Whiptail - 4722. 謂 Super Sandwich - Vista - 6543			Upload File
聞 Super Sandwich - Mayo - 7658 聞 Super Sandwich - Norma - 7896			
M Saher sauciacus - c'auzono - saan		Cancel	

9. Once saved, you will be taken back to the **Manage Report Groups** page. Repeat the process for all of the stores.

**Note:** The newly created Group Folder will now have a chevron. Click on the ">" symbol to expand the group to see which stores are contained within that group.



### **Creating a 2nd level Group**

Please note: this is an example of a **2nd level** group. In this case, the Area Manager is on the 2nd level and oversees three individual store Managers.

				LOCK DEVICE SETTINGS	SETTING	SS SNAPSHOTS	APPLY	DEVICE SETTI	NGS
lanage	e Repo	ort Grou	ps						
<b>Q</b> Type a	a store name	e, store numb	er # or group	name		Edit Group		Add Group	Rem

1. Click to highlight the stores you wish to assign to an Area Manager, then click the **Move** button.

<b>NE</b> CLO	UD"						WELCOME	DASHBOARD	REPORTS	Move
STORES	USERS	ROLES	DISPLAY	LOCK DEVICE SETTING	S SETTINGS SNAF	SHOTS APP	PLY DEVICE SETTI	NGS		
Mana	ige Repo	rt Grou	ps							
Q Тур	oe a store nam	e, store numl	ber # or grou	p name	Ed	it Group	Add Group	Remov	Move	
	- Judge Holde	n (District Ma	nager)							
	Bront Ga	lord (Aroa Ma	inager)							
Ť		mith (Store )	(apager)							
		sintin (store i	wanager)							
	> 🛅 Jamie	Delacruz (Sto	ore Manager)							
	> 🛅 Jean C	laude Cemba	lo (Store Mai	nager)						
>	D Quinn Leo	lerc (Area Ma	inager)							
>	🗀 Simone G	ulliver (Area	Manager)							

3. In the **To** window, start typing the name of the Area Manager. The name will auto-populate. Select the Area Manager's name and then click **Move.** 

HBOARD REPORTS LEADERBOARDS SETTINGS 🎇 SMACK Logged in as Jord
×
aylord (Area Manager) PORT
you are about to move ;lord (Area Manager)
PORT Choose file
Upload File
Move
Cancel Move
ervices

# 2. Using the same steps, add the **Area Manager** groups as subgroups to the next level in the **Report Group**, which in this example is **District Manager**.

Note: You will see that **District Manager** is at the top level of the Reporting Group, when expanded.

STORES	USERS	ROLES	DISPLAY	LOCK DEVICE SETTINGS	SETTINGS SNAPS	нотя	APPLY DE	VICE SETTIN	IGS
Mana	ge Repo	ort Grou	ps						
Q Тур	e a store nam	ie, store numl	ber # or group	name	Edit	t Group	A	Add Group	Rer
<b>~</b> □	Judge Holde	n (District Ma	inager)						
	→ Judge Holde → Brent Gay →  → Chris	n (District Ma ylord (Area Ma Smith (Store I	nnager) anager) Manager)						
	→ Judge Holde → Brent Gay → ← Chris 冊 Sup	n (District Ma ylord (Area Ma Smith (Store I per Sandwich	inager) anager) Manager) - La Palm - 0001	05					

### **Removing a Report Group**

1. Select the group you want to remove, click **Remove** and a confirmation will pop-up.

HMECLO	UD'					WELCOME	DASHBOARD	REPORTS	LEADERB
STORES	USERS	ROLES	DISPLAY	LOCK DEVICE SETTINGS	SETTINGS SNAPSHOTS	APPLY DEVICE SETTIM	IGS		
Mana	ge Repo	ort Grouj	os						
Q Typ	e a store nam	e, store numb	er # or grou	p name	Edit Group	Add Group	Remov	/e N	love
~ 🖻	Judge Holde	n (District Mar	nager)				_		
	🛅 Brent Gay	/lord (Area Ma	nager)						
>	🗋 Quinn Le	clerc (Area Ma	nager)						
>	🗀 Simone G	iulliver (Area M	lanager)						

2. Click **Remove** to continue.

**Note:** Stores cannot be removed. When a Report Group is removed the stores inside move to the root level.

(# or group name	Edit Group Add Group Remove Move	EXPORT
iger)		Export in CSV
ager)		
ager)		IMPORT
inager)	Whoa, hold on	
	Removing Group will cause all stores and groups associated to be removed as well. Are you sure you want to remove this group?	
	Cancel Remove Remove	

### **Viewing Report Groups**

- Once groups are created, the restaurants listed in the **Stores** page will show the different tiers of the hierarchy under the **REPORT GROUP** column.

itores 🕞	EARCH FOR V	Q type a Store #	Search Mana	ge Hierard REPOR	T GROUP	
STORE INFORMATIO	ON			I I I I		$\frown$
BRAND <b>↑</b>	STORE #	STORE NAME	STORE ADDRESS	CITY, STATE	JARD	REPORT GROUP
HME	6543	Best Burger - Dallas	123 Main St	Dallas, TX	Darcey	Tony Jones (Store Manage
нме	4444	Best Burger - Bonita	58933 Bonita Ave.	Carone, CA	Darcey	Miguel Ramirez (Store Manager)
нме	7896	Best Burger - Covington	15689 Red Centre Rd.	Covington, WA	Darcey	Michael Bourn (Store Manager)
HME	073	Best Burger - Dawsonville	73 Bethel Lane	Dawsonville, GA	Darcey	Priyanka Patel (Store Manager)
нме	8996	Best Burger - Mira Mesa	21 Mockingbird Lane	Brighton, CA	Darcey	Rondo Hockenstock (Store Manager)
нме	7658	Best Burger - Bremerton	312 Libra Ct.	Bremerton, WA	Darcey	Sean Whitley (Store Manager)
HME	4722	Best Burger - Bernardo	182 S Rancho Santa Fe Rd	San Macros, CA	Darcey	Rachael Walker (Store Manager)

The store grouping and hierarchy will appear in the **Reports** page and when assigning **Store Access** permissions to new users on the **HME CLOUD**.

iroups / Stores	Date Range
District Manager - Julian Townsend	OPTIONS Date Int
Area Manager - Gerry Lopez	
🖉 🗹 Area Manager - Justine LeBeau	Current Week
🖻 🗹 Michael Bourn (Store Manager)	
🖻 🗹 Sean Whitley (Store Manager)	<b>1</b> 3/5/2023
🗅 🗹 Tim Pegram (Store Manager)	3/5/2023



#### For help, call 800.848.4468 (options 1,2, and 3) or email: support@hme.com

#### **HME Training Portal** Find instructional videos, supporting documents, and other guides.

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