

## 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

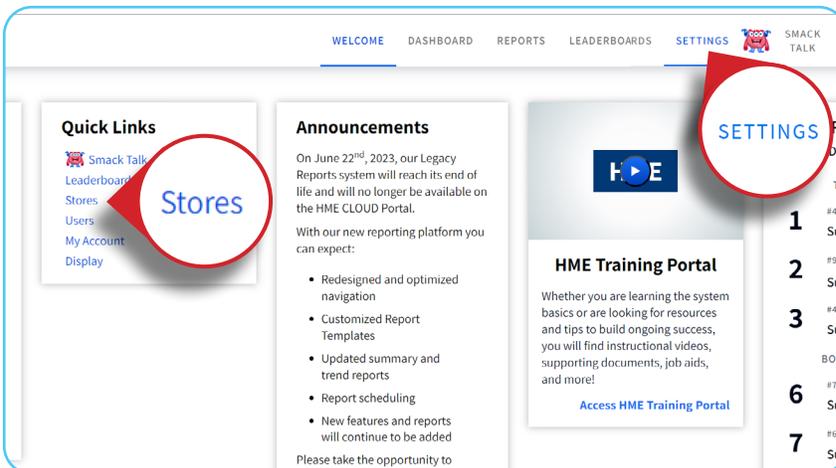
- You can create and name groups for your restaurants based on any criteria, such as lane type or region.
- You may also create smaller groupings of restaurants, known as **subgroups**, that belong to larger groups.
- For example, restaurants may be grouped into **Districts** and sub-grouped into **Regions**.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

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

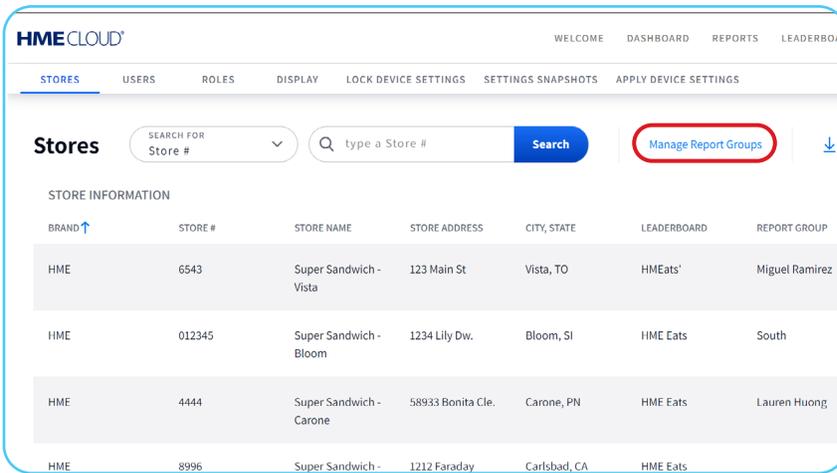
- District Manager
- Area Manager
- Individual Store Managers

### How to Organize Restaurants into Report Groups

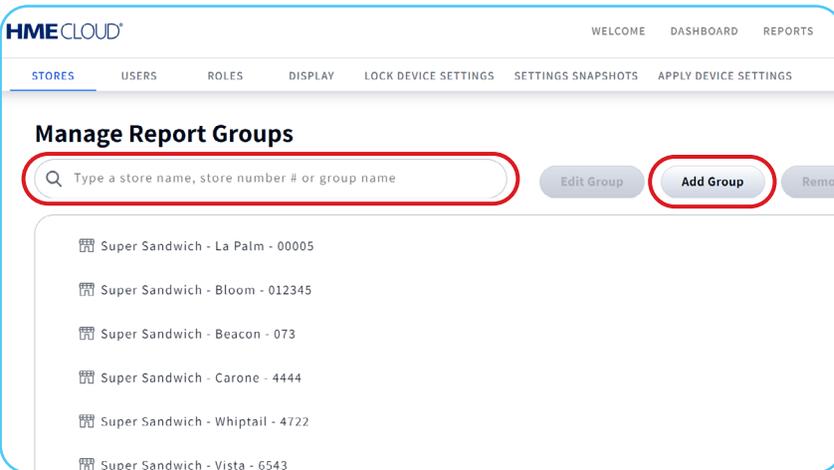
1. **Log on** to your HME CLOUD Account.
2. Click the **SETTINGS** link on the main navigation bar, or click the **Stores** link on the **Quick Links** section.  
**Note:** Only Account Owners and users granted permission may create Report Groups.



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



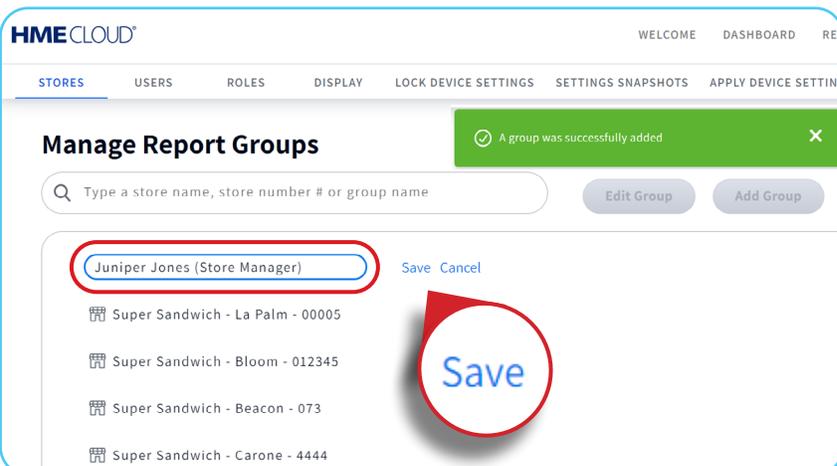
4. Type in the search field to look for the store name, store number or group name. Select the **Add New Group** button.  
**Note:** Groups may be divided into **subgroups**.



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

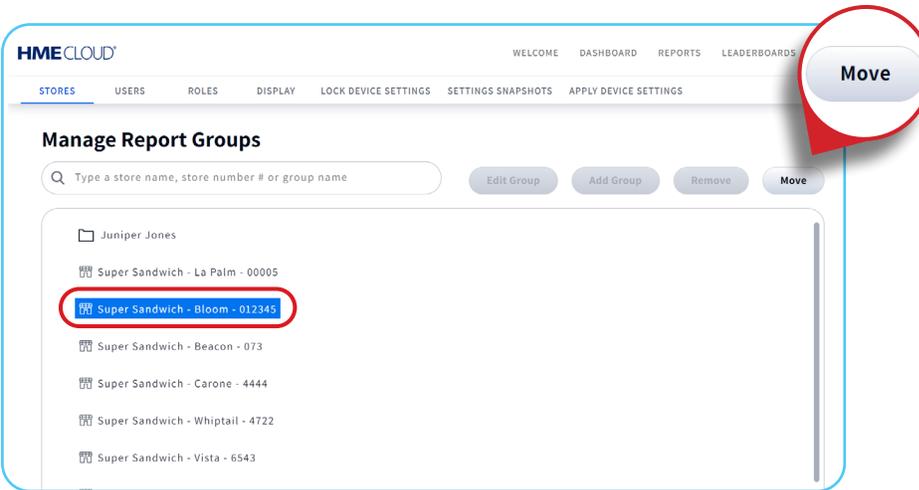
In this example, **Store Managers** are the base tier of the hierarchy, managing individual stores. A green success notification will appear.

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

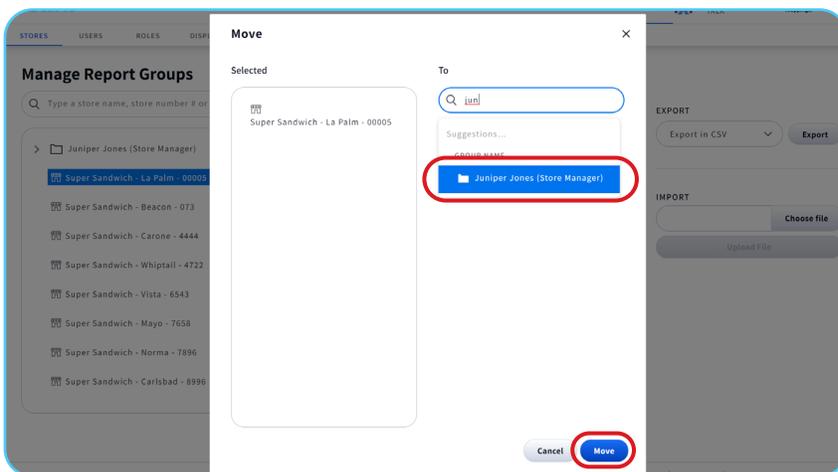


6. From the Groups/ Stores list, select the store(s) to assign to the Store Manager. Then click **Move**.

**Note:** The selected store will be highlighted in blue. Make sure only the stores you want to group are selected.

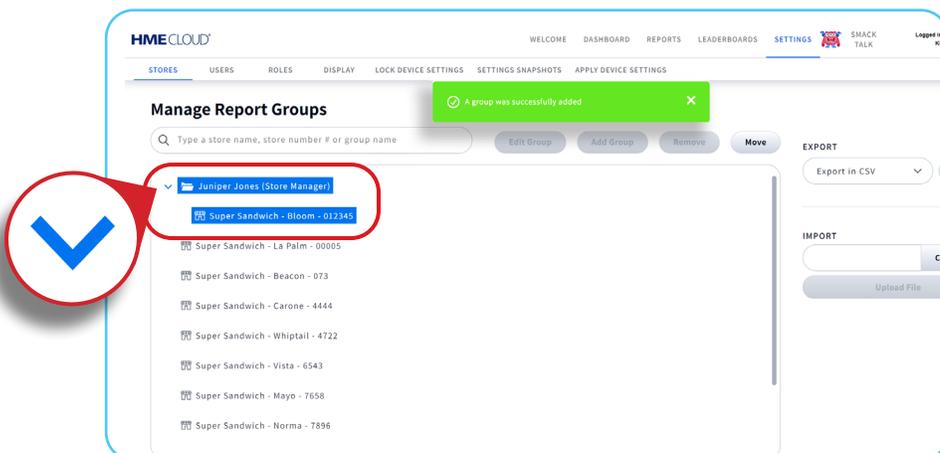


7. The **Move** box will open. Begin typing the name of the Store Manager or Group where you would like to assign the restaurant. A drop down list of available group names will pop up. Make your selection from the list.
8. Review your selection then, click **Move**. A green success notification will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



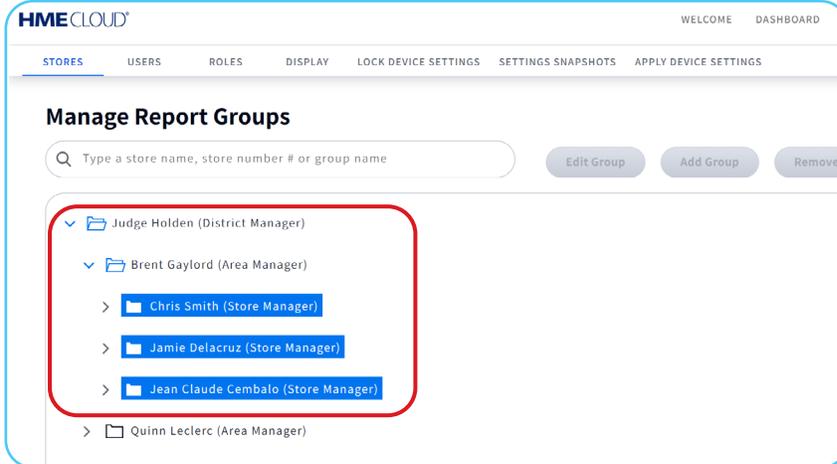
9. Once saved, you will be taken back to the **Manage Report Groups** page. Repeat the process for all of the stores.

**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.

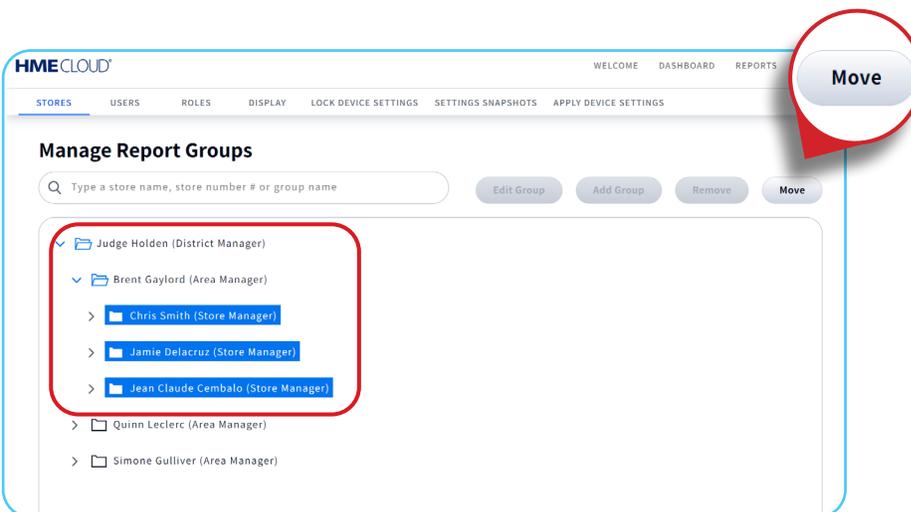


## Creating a 2nd level Group

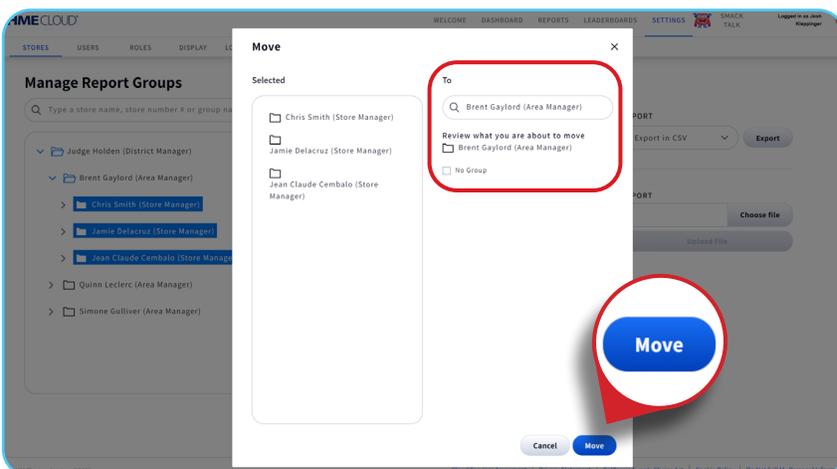
Please note: this is an example of a **2nd level** group. In this case, the Area Manager is on the 2nd level and oversees three individual store Managers.



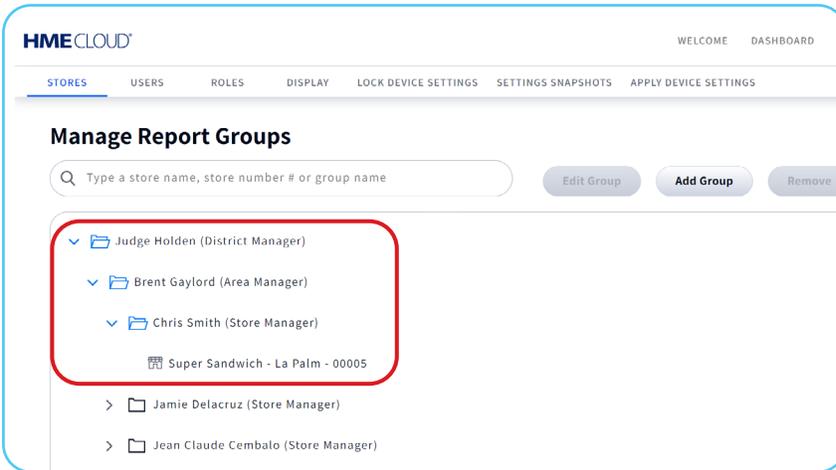
1. Click to highlight the stores you wish to assign to an Area Manager, then click the **Move** button.



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**.

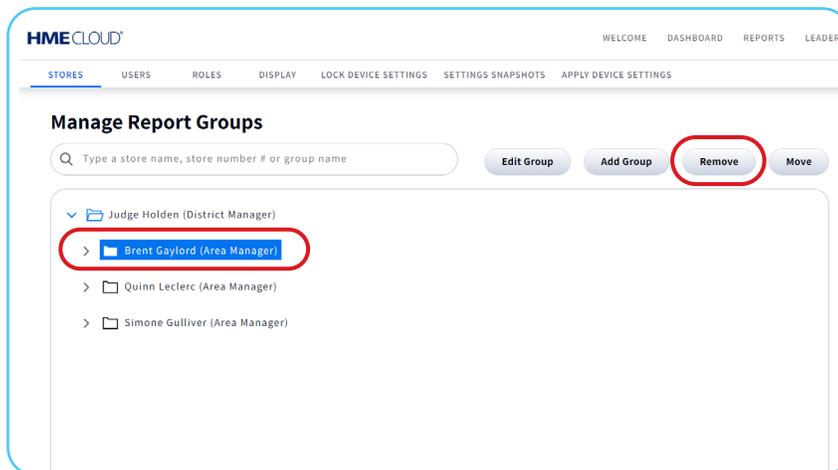


- Using the same steps, add the **Area Manager** groups as subgroups to the next level in the **Report Group**, which in this example is **District Manager**.  
**Note:** You will see that **District Manager** is at the top level of the Reporting Group, when expanded.



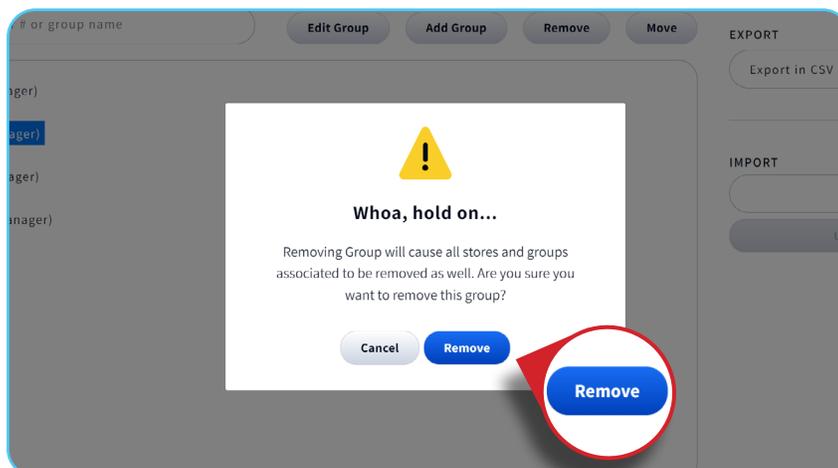
## Removing a Report Group

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



- Click **Remove** to continue.

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



## 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.

BRAND	STORE #	STORE NAME	STORE ADDRESS	CITY, STATE	REPORT GROUP	
HME	6543	Best Burger - Dallas	123 Main St	Dallas, TX	Darcey	Tony Jones (Store Manager)
HME	4444	Best Burger - Bonita	58933 Bonita Ave.	Carone, CA	Darcey	Miguel Ramirez (Store Manager)
HME	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)
HME	8996	Best Burger - Mira Mesa	21 Mockingbird Lane	Brighton, CA	Darcey	Rondo Hockenstock (Store Manager)
HME	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 Marcos, 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**.

**HME Multi Store - Summary Report**

Groups / Stores

- District Manager - Julian Townsend
  - Area Manager - Gerry Lopez
    - Area Manager - Justine LeBeau
      - Michael Bourn (Store Manager)
      - Sean Whitley (Store Manager)
      - Tim Pegram (Store Manager)

Legend: Goal A (Green), Goal B (Yellow), Goal C (Red), Goal D (Dark Red), Goal > D (Black)

**Create New User**

General

EMAIL ADDRESS:

FIRST NAME:

LAST NAME:

Role & Store Access

ROLE:

STORE ACCESS

- Area Manager - Justine LeBeau
  - Michael Bourn (Store Manager)
  - Sean Whitley (Store Manager)
  - Tim Pegram (Store Manager)
  - Area Manager - Michelle Wu

Select All | Deselect All

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

