

Chainformation Admin User Guide

(Business Areas)

Last Updated: August 31, 2023

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage the **Business areas** section on the **System setup** page.

Chainformation allows you to classify the units in your organization on the basis of their internal business structure. This internal substructure within a **Chainformation** platform is defined by **Business areas**.

Typically, there could be two main business areas in an organization; franchised and corporate owned. Units associated with the franchised model are the stores owned by your licensed Franchisees. On the other hand, corporate-owned stores work as internal entities.

You could create other business areas for your organization as well such as mobile units, flagship stores, etc. Furthermore, **Chainformation** also allows you to associate a unit with multiple business areas if it is required. For example, a mobile catering franchise of a food chain should be associated with the franchised as well as mobile units business area.

In this way, the business areas feature of a **Chainformation** platform complements its role-based structure to distinguish the local units working in the same geographical area but with different internal business structures. You could filter what information should be shared with what business areas by choosing the appropriate business areas in the sharing selection of your central and global content.

(See Separate Manuals on **Roles Administration, Geographical Areas, Local Units and Sharing Selection**)

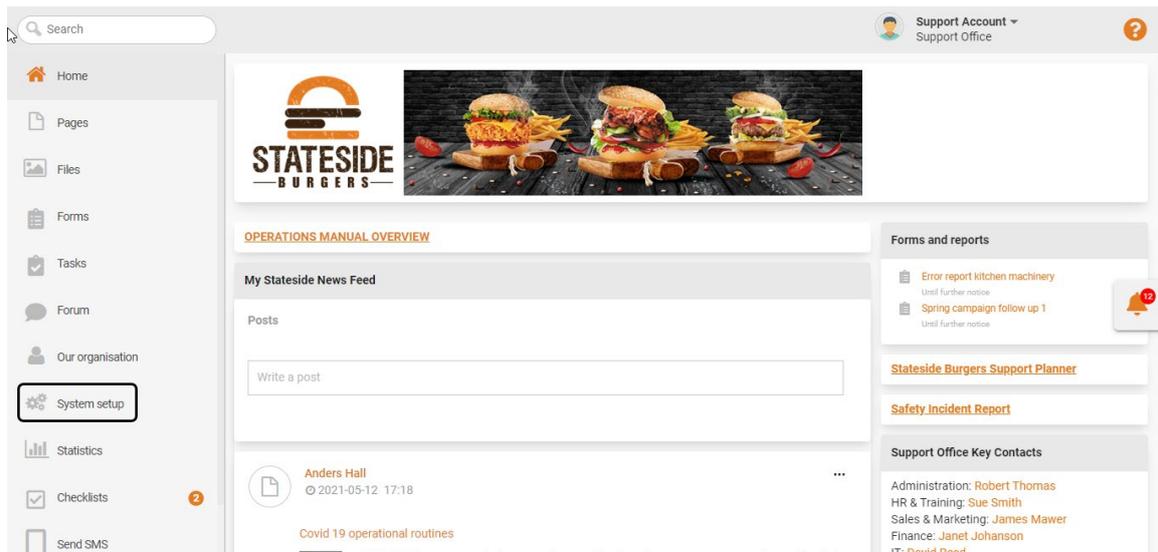
Here is a list of all the features of the **Business areas** module that we will discuss in this manual.

- Create a New Business Area
- Extend Sharing of the Existing Content to the New Business Area
- View the Existing Business Areas in Your Organization
- Review the Details of a Business Area
- Edit a Business Area
- Delete a Business Area

Create a New Business Area

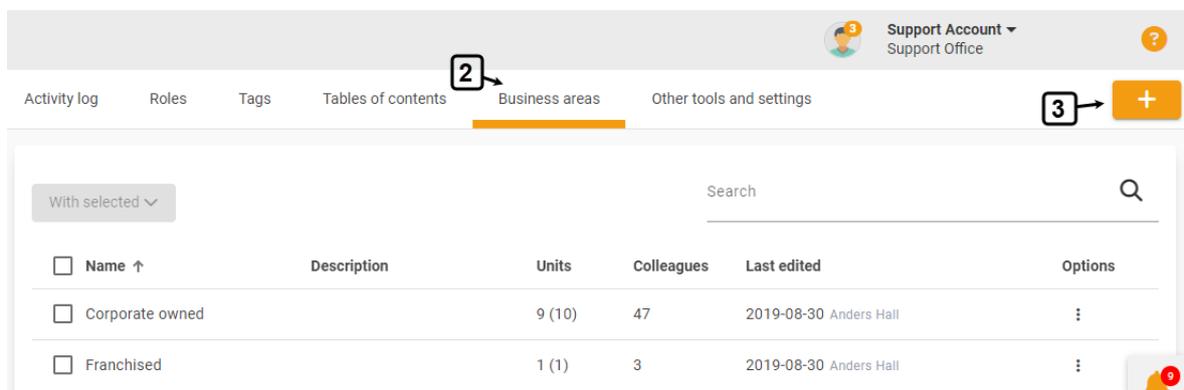
Once you have logged in to the **Chainformation** platform, follow these navigation steps to **create a new business area**.

1. Click the **System setup** button in the left-side menu to open the **System setup** page.



By default, you will be redirected to the **Activity log**.

2. Click the **Business areas** button from the header menu of the **System setup** page to open the **Business areas** tab.
3. Click the (+) icon in the top-right corner of the **Business areas** page to create a new business area.



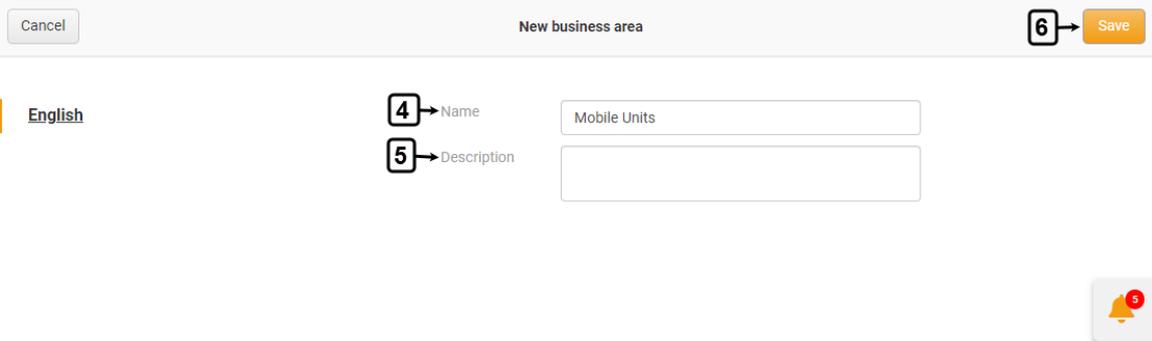
This will open the **New business area** page.

4. On the **New business area** page, enter the **Name** of the new business area.

The name of a business area should be clear, descriptive and reflecting the scope of business operations that will be done in the units associated with this business area.

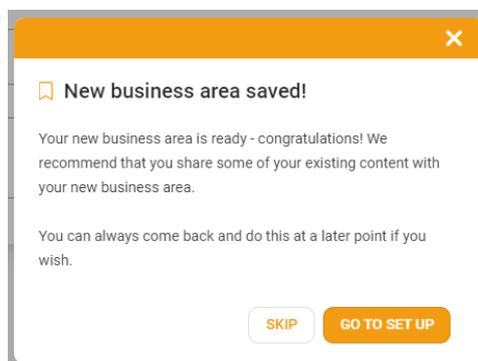
5. Enter a brief **Description** (if applicable) of the new business area to further explain its scope and entity.

6. Once you have entered all the required details of the new business area, click the **Save** button in the top-right corner of the page to add this business area to your organisation.



The new business area has been added to the system setup of your organisation and you can associate the new or existing local units with it from now on. [See the User Guide for Units](#)

After you save the new business area, a pop-up message will show up suggesting you share some of your existing content with this business area.



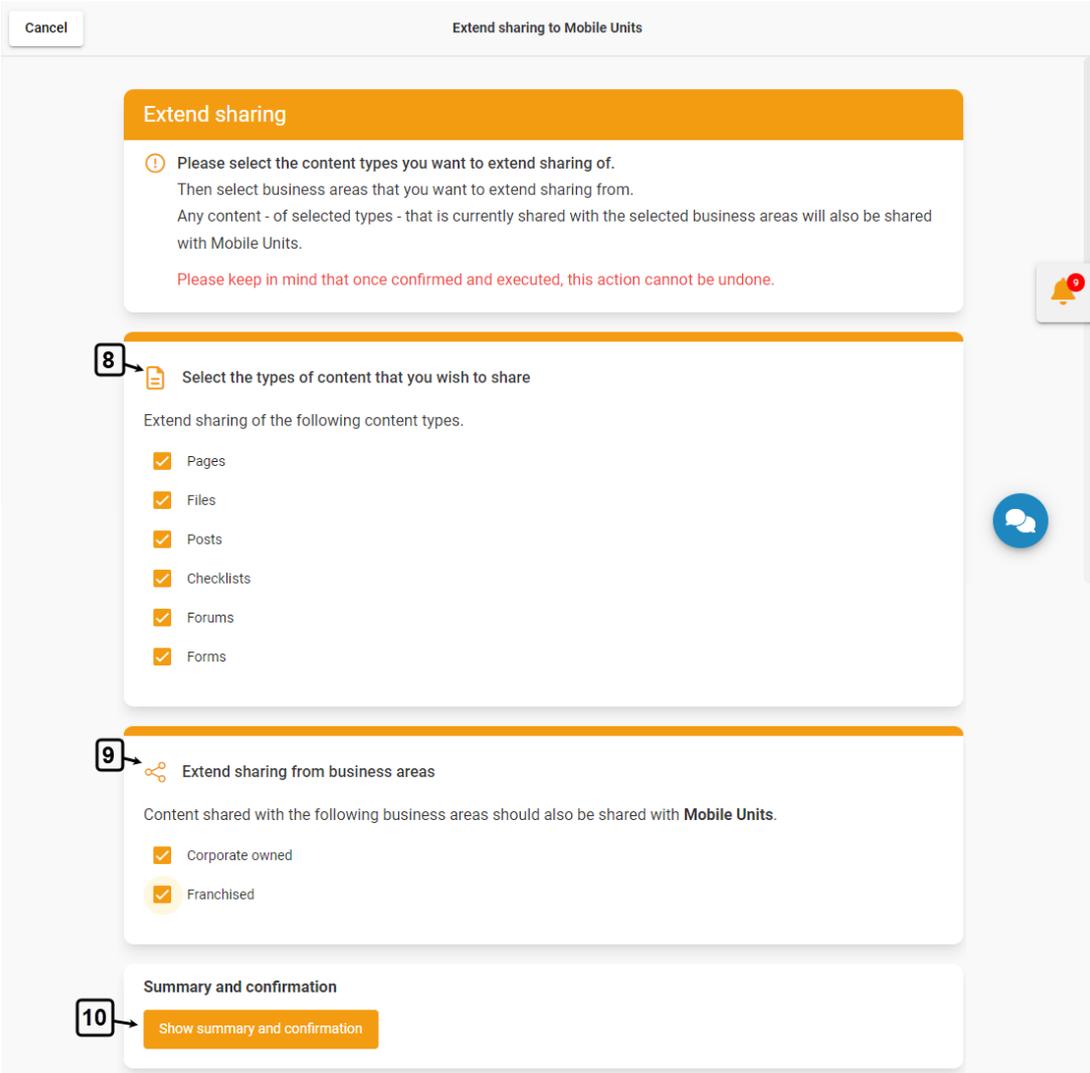
If this is the very first business area you have created in your organisation and you do not have any content to share with it for now or want to share the content with it at a later point, you can simply **skip** this message.

7. However, if you have already added some other business areas before this one and there is some existing relevant content that could be valuable for the current business area, then you should click the **GO TO SETUP** button.

Extend Sharing of the Existing Content to the New Business Area

Now, you will be redirected to the **Extend sharing** page for the selected business area where you can share existing pages, files, feed posts, checklists, forums, and forms with the recently created business area.

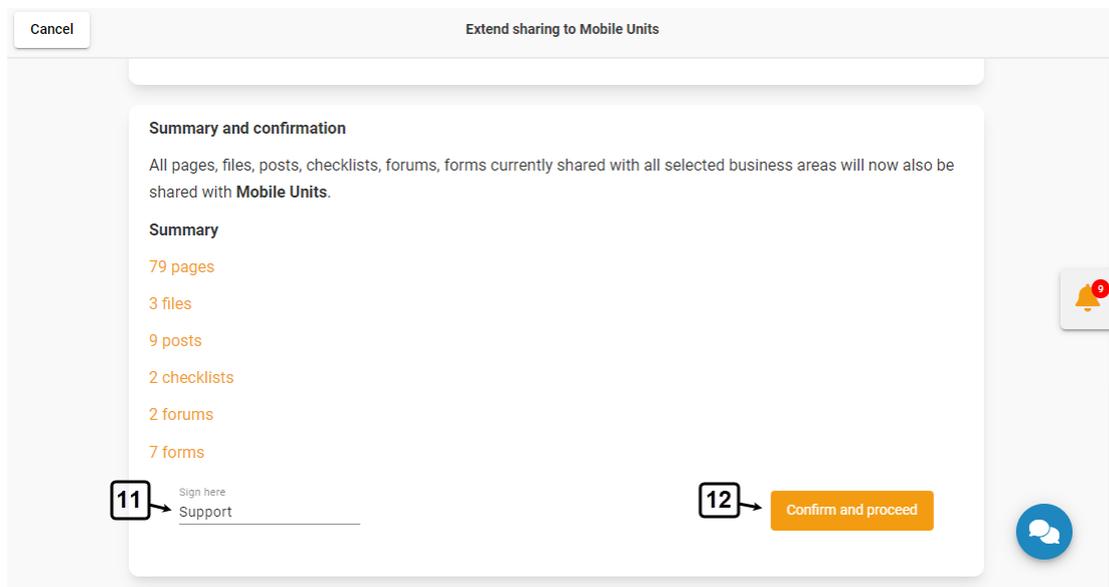
You can share this content with the current business area by extending the sharing selection for the content already shared with some other business areas in your organisation.



8. **Select the types of content that you wish to share** with the current business area.

9. Under the **Extend sharing from business areas** list, select the business areas content shared with them you also want to share with the current business area.

10. Now click the **Show summary and confirmation** button to review the number of each content type that will be shared with the current business area once you confirm this action.



Note: Once you have confirmed the selections made on the **Extend sharing** page for the current business area, the system will automatically share the selected content items shared with the selected business areas, with the current business area as well.

However, these selections will be valid only for the existing content and will not apply to any new page, file, post, checklist, forum, or form shared with the selected business areas in the future.

Remember, you cannot undo this action from this page once it has been executed if you decide to stop sharing the content shared with the current business area in the future.

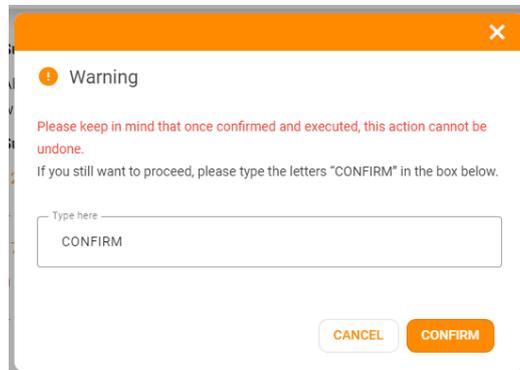
Instead, you will have to stop sharing this content with the current business area one by one by changing the **sharing selection** of each page, file, post, checklist, forum, and form shared directly from the **Extend sharing** page. See the User Guide for **Sharing Selection**

Therefore, carefully review the content types and business areas you have selected on the **Extend sharing** page.

11. Once you have reviewed your selections, enter your digital signature in the **Sign here** field in the bottom-left corner of the page.

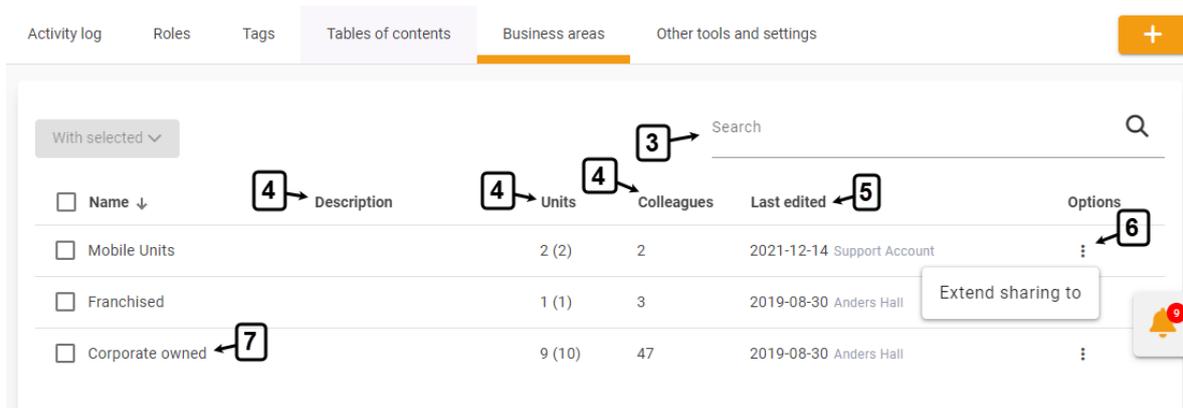
12. Click the **Confirm and proceed** button in the bottom-right corner of the page to execute the changes you have made.

13. Type the letters “**CONFIRM**” in the warning field shown on the screen and click the **CONFIRM** button to extend sharing of the selected content items to the current business area.



View the Existing Business Areas in Your Organization

1. Access the **Business areas** tab on the **System setup** page by following the navigation steps as demonstrated in the previous section.
2. On the **Business areas** page, you can view all the existing business areas in the system setup of your organization.



3. You can also use the **Search** field to find a business area based on any of the available data/information. See the User Guide for Search
4. You can see the description of each business area, the number of units in it and the number of colleagues associated with these units on the **Business areas** page.

Note: The number enclosed in brackets next to a business area name in the **Units** column shows the total number of units in this area. Whereas, the number before brackets indicates how many of these units are active.

5. You can also see when and who has last edited a business area.

6. You can share existing content with a business area by clicking the **Extend sharing to** button from its **Options** menu.

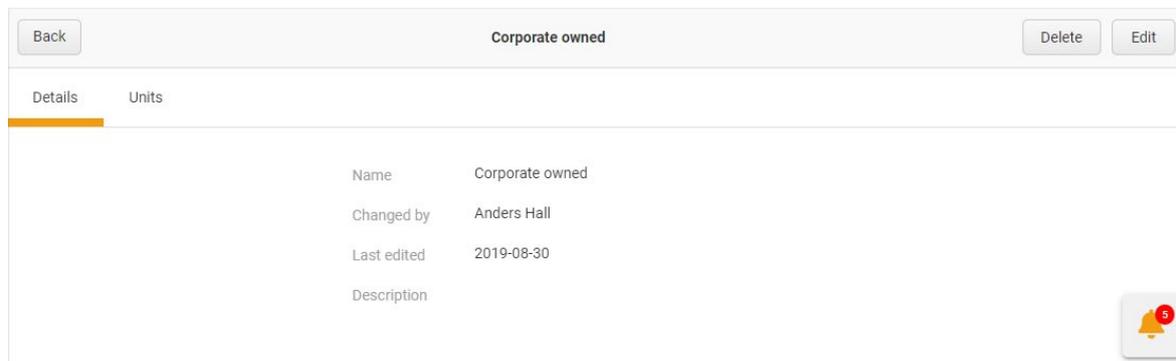
This will open the **Extend sharing** page for the selected business area where you can share the existing content with it by extending the sharing selection for content already shared with some other business areas. [See the User Guide for Extend Sharing to a Business Area](#)

7. Click the name of a business area to view its details.

This will open the selected **Business area** page where you can view its complete description and details of all the units in this business area.

Review the Details of a Business Area

1. On the **Details** tab of the selected **Business area** page, you can review its name and complete description. Furthermore, you can also view when and who has last edited it.



2. On the **Units** tab of the selected **Business area** page, you can view the names of all the units associated with this business area. Furthermore, you can view the cluster, email and phone number of each unit.

You can also view the status of each unit i.e. whether it is currently active or not.

Back		Corporate owned				Delete	Edit
Details		Units					
Name	Cluster	Business areas	Email address	Phone number	Status		
Birmingham	Corporate owned				Active		
Cardiff	Corporate owned				Active		
Dover	Corporate owned				Active		
Edinburgh	Corporate owned				Active		
Manchester	Corporate owned				Active		
Milano	Corporate owned				Active		
New York	Corporate owned	nycorporate@gmail...	(+1) 12313342		Active		
Newquay	Corporate owned				Active		
Northampton	Corporate owned				Active		

3. You can review other details of a unit and the users associated with it as well by clicking its name on the **Units** tab of the selected **Business area** page. See the User Guide for Units

4. You can edit or delete a business area by clicking the respective button in the top-right corner of the selected **Business area** page.

Edit a Business Area

1. On the **Edit Business area** page, you can update its name and description as demonstrated in the previous section. See the User Guide for Create a New Business Area

Note: The name of a business area reflects the scope of business operations being done in the units associated with this business area. Therefore, we strongly recommend you should never change the name of a business area when you still have some active business operations in it.

2. Once you have edited the information you want to update for the selected business area, click the **Save** button in the top-right corner of the page to save all the changes you have made.

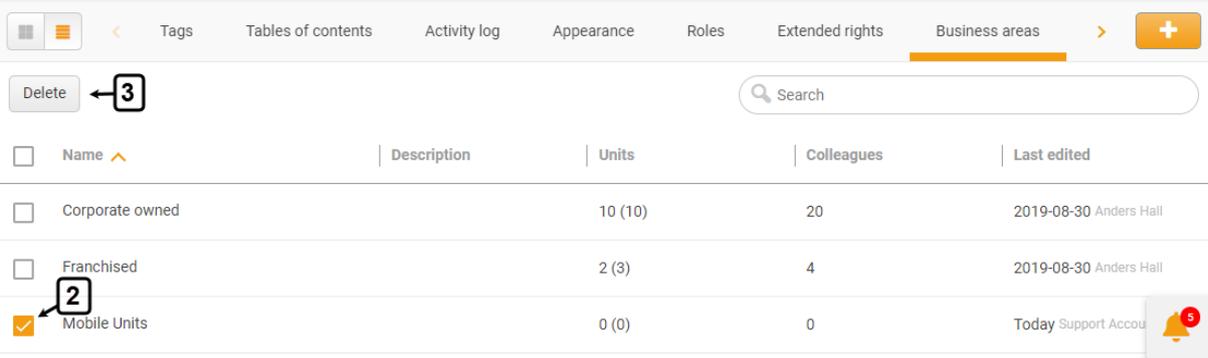
Cancel		Edit Corporate owned		Save
English	Name	<input type="text" value="Corporate owned"/>		
	Description	<input type="text"/>		

Delete a Business Area

Remember, there is no **Trash** folder for the **Business areas** module on the **Chainformation** platform from which you can restore a deleted business area. Therefore, when you delete a business area, the system will delete all the information related to it permanently.

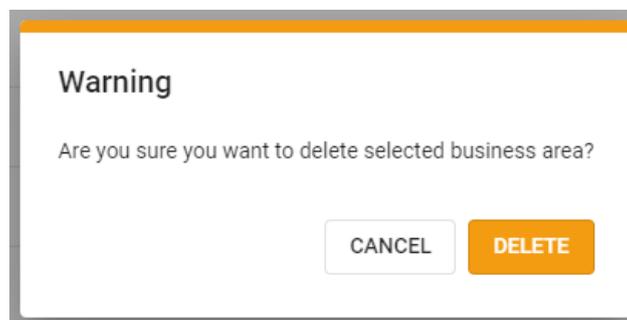
Now, follow the navigation steps demonstrated below to delete a business area if you do not have any active business operations and units in it anymore and want to remove it from your organization.

1. Access the **Business areas** page by following the navigation steps as demonstrated in the previous section.
2. Navigate to the business area you want to delete and **check the checkbox** next to its name.
3. Click the **Delete** button above the list of business areas.



<input type="checkbox"/>	Name 	Description	Units	Colleagues	Last edited
<input type="checkbox"/>	Corporate owned		10 (10)	20	2019-08-30 Anders Hall
<input type="checkbox"/>	Franchised		2 (3)	4	2019-08-30 Anders Hall
<input checked="" type="checkbox"/>	Mobile Units		0 (0)	0	Today Support Account 

4. You can also delete a business area by clicking the **Delete** button in the top-right corner of the **Business area** page you want to delete.
5. Click the **DELETE** button in the pop-up message shown on the screen to delete the selected role.



Note: You cannot delete a business area until you have deleted all the units and users associated with it or moved them to another business area. The system will show an error when you try to delete a business area that is connected to at least one user or unit in your organization.

