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## INTRODUCTION TO FMS – VERSION 4 (FMS4):

FMS or “Franchise Management System” is a software program designed specifically to assist all stakeholders in the Company and is the lynchpin in managing the information flow.

As a Franchisor you will have access at your home or office to FMS4.

### **ACTION**

To install go to:

<http://www.franchisors.jims.net/documents/infotech/fms4/>

Follow the prompts.

REFER ALSO TO FMS 4 Getting Started link below.

### **ACTION**

<http://www.franchisors.jims.net/documents/infotech/fms4/Getting%20Started.doc>

Once the FMS 4 software is installed you will be asked for a “user name” and “password” to access the system.

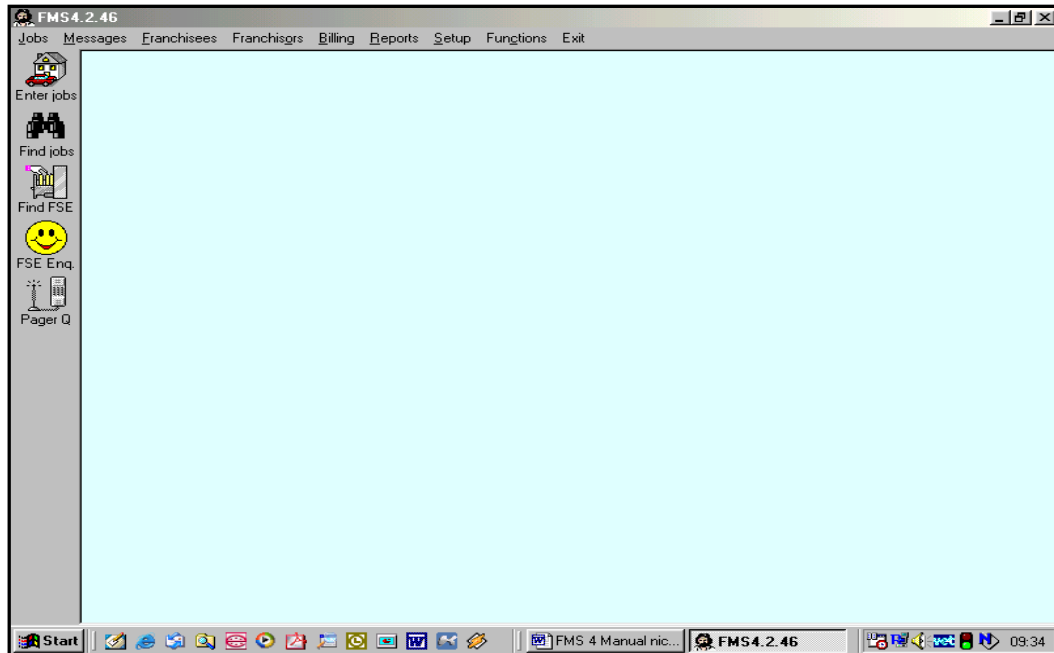
As a Franchisor you will have customised access; this allows you to do the following:

- Access to your Region - view only. You cannot edit your Region without National Office approval.
- Access your own Franchisee’s details.
- View your Franchisees’ territory / areas: View only. You cannot edit this section without National Office approval.
- Use the Job Entry screen to book customer jobs
- Delete / add services to your Franchisees
- Set up your Franchisees on FMS 4
- Work Requirements for your Franchisees
- Run your End Of Month Billing
- Track Franchise enquiries
- Set up the Franchisees areas and postcode priority, where appropriate.

### **NOTE**

Franchisors cannot set up Franchisee territories. This can only be executed by Jim’s Corp Administration Centre.

Once you have logged into FMS4 you will see the screen below.



## JOBS

### Entering Jobs

Open the “Job Entry” screen by selecting the “Jobs” menu and clicking on “Enter jobs...”  
Alternatively select “Enter jobs” from the toolbar.

Send the job to: **derrek kiernan GF7 -** Other FSEs... (F4)

**derrek will call within 2 hours**

Previous jobs at this address: (none found) View... (F5)

Service:

Suburb:

Address:

Price quoted:  Required:

Client's name:  Phone:  Mobile:  BH:

Notes for franchisee:  41

How did the client hear about us?

Notes for the office:

To enter the job type the service or click on the arrow to select service, enter suburb and address. Once this is entered one of 2 options will appear:

- Sorry no one is available or
- Name and Code of Franchisee available who can contact the client regarding the job.

Enter clients name and contract phone number. Make sure the information entered in the Notes for Franchisee sections are brief but understandable e.g. (please) pls (phone) ph (client) cli to (arrange) arr (quote) q

If a Franchisee is available, press the “Book this Job” button. If no one is available click clear this will ask you “Do you want to save as unserviced job” click “yes”.

## PREVIOUS JOBS

If you enter the Job for eg. **Mow Once** – once you have entered the address and it shows that the client has used us before you will notice the view button will flash yellow. Click on the View button – click send message – type in message and Click send as message.

Job entry

Send the job to:  
**JULIE GIBSON SK -** Other FSEs... (F4)

**JULIE will call within 2 hours**

Previous jobs at this address:  
PC4 COLORBOND 9-Jul-04, HU2 BOOK 9-Jul-04, SK MOW-REG 8-Jul-04, PC3  
HANDYMAN 23-Feb-04, PT3 CARPET 4-Feb-04, LZ2(x) WASH 21-Jan-04, LV2  
S/DDOR QUOTE 11-Nov-03, NS(x)(z) RIDEONREG 13-Aug-03, NS(x)(z) MOW-REG View... (F5)

Service: MOW ONCE

Suburb: MOOROODLARK 3138 VIC

Address: 48 EDINBURGH rd

Price quoted: Required: 22/09/2004 14:30

Client's name: JIMS BUILDINI Phone: 97809998 Mobile: BH:

Notes for franchisee: 68

How did the client hear about us?

Notes for the office:

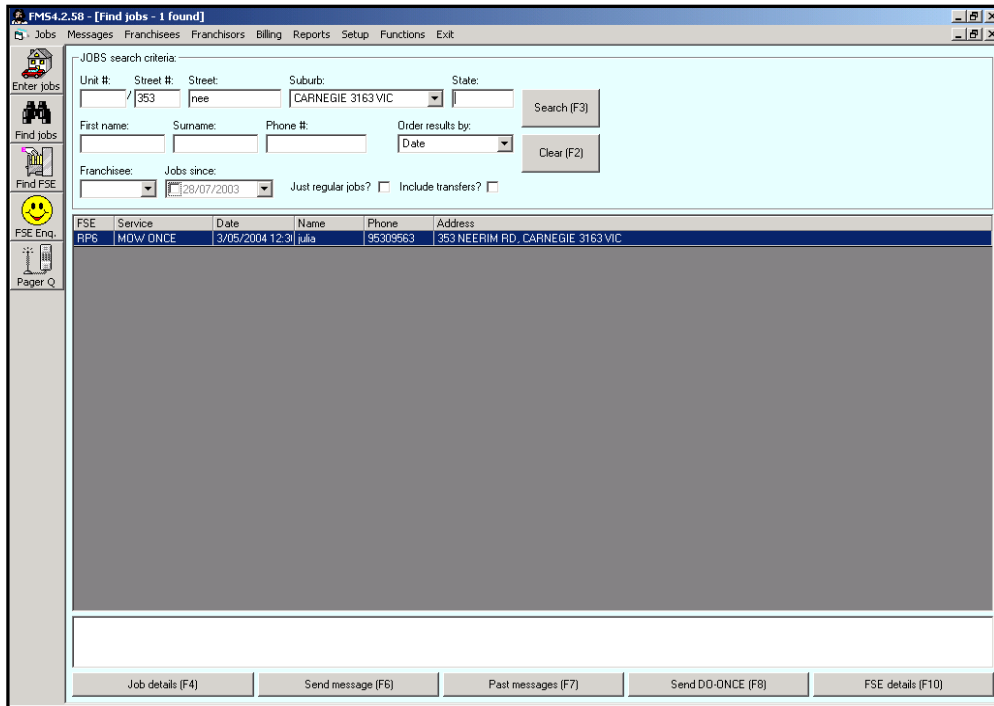
Book this job! (F3) Clear (F2) Restore (F6)

If there are several jobs to enter at the same address you can use the “RESTORE” button, which will insert the previous address, client’s name & phone numbers, you just need to nominate the service being used. You will need to press enter until you get pass the address for the system to allocate franchisee.

All the details entered will be transmitted directly to the nominated Franchisee and will appear as an SMS on his mobile phone.

## SEARCH FOR A JOB

Users can search for clients or jobs by any combination of address, name, phone number, franchisee or date. FMS4 can search successfully without all the necessary information to make the search function quick and easy to use.



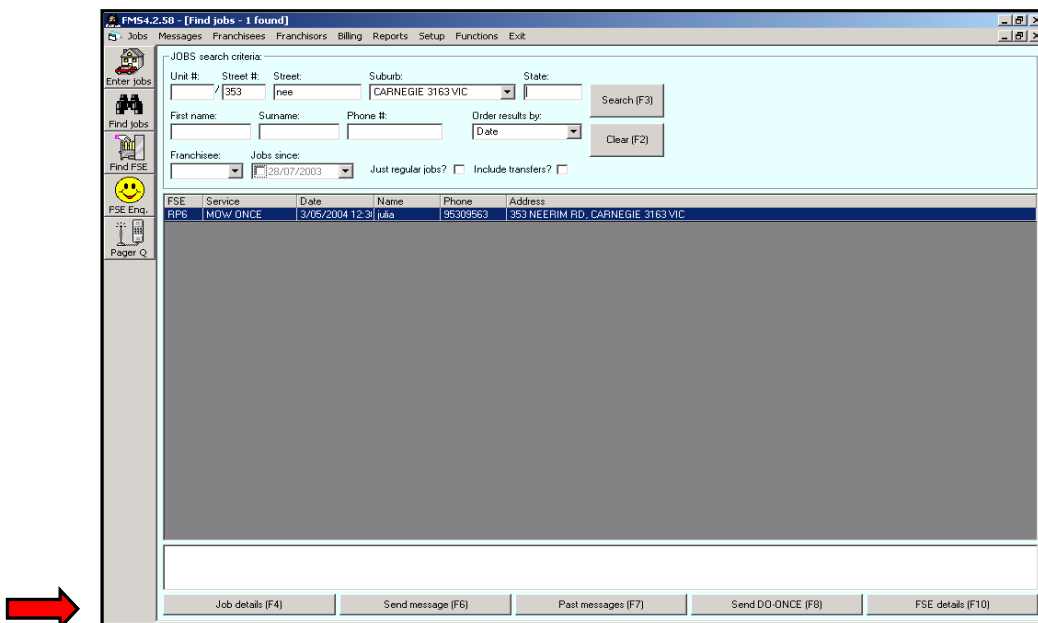
Open the Find Jobs screen by selecting the “Jobs” menu, then click on “Find Jobs...” Alternatively, select “Find Jobs” on the toolbar. Enter details in appropriate box and click

Search. When you have found the information, look for the “Job Details” on the bottom left hand side of the screen. This button links to more details of the specific job.

This facility offers more functions; for example – placing notes on the file that any other user can read or take action upon. It is important to record all information, including historical data, for future reference.

### EDITING JOBS

To Edit or View a Job, once you have found the job click “Job Details”, or use the shortcut key of F4, in the “Find Jobs” screen



### Reallocate or redirect the job

To a different franchisee, select the “Reallocate to (code of franchisee) at the top right “Reallocate to someone else...” box if you want to select a certain Franchisee. Once you have selected the franchisee click allocate.

Job notes must be added to the file when using the reallocate to another Franchisee, (see below) so that the Admin Centre can track changes.

The screenshot shows a software window titled "Reallocate" with the following sections:

- Current franchisee details:** A calendar grid showing days of the week (S, M, T, W, T, F, S) and a phone number field containing "0421616738".
- Reallocation:** Two buttons: "Reallocate to TH4" and "Reallocate to someone else...".
- Details:** A grid of dropdown menus and checkboxes:
  - Status: [OK]
  - Current FSE: [CD5]
  - Previous FSE: [ ]
  - Picked up by: [ ]
  - Original FSE: [CD5]
  - Service: [MOW REGULAR]
  - Original service: [MOW REGULAR]
  - Price: [ ]
  - Regular?:
  - Due date: [08/12/2003 08:00:00]
  - Transfer date: [ ]
  - Lead cancel date: [ ]
  - Job cancel date: [ ]
  - Source: [Newspapers]
  - Booked: 7/12/2003 5:39:07 PM by test
- Notes:** A table with columns for date, user, and message.

7/12/2003 5:44:31 PM	test	Notes: client requested CD5
...	...	[enter new note...]
- Bottom navigation:** Buttons for "Address", "Person", "Send message", "Past messages", "History", "Save", and "Cancel".

Once you have reallocated, the send message box will appear – type message and send as a “Job”. The reallocation to an alternate Franchisee will affect work allocation. Click Save.

### Add Notes to a job

Click in Notes box and move cursor to enter new note a box will appear type in comments click Ok.

FMS4 automatically records the user’s name next to the comments, as well as the date and time data was entered. If several notes have already been entered, keep scrolling to the last entry listed, and then add your own.

MOW REGULAR at 85 RESERVE RD, BEAUMARIS 3193 VIC (#631185)

Current franchisee details: W T F S S M T, A A A 0 0 A A, Phone: 0411571311

Reallocation: Reallocate to PB8, Reallocate to someone else...

Details: Status: OK, Price: Regular?    
 Current FSE: GC10, Due date: 22/04/2004 17:00:00   
 Previous FSE: KL2, Transfer date: 05/05/2004 13:04:22   
 Picked up by: GC10, Lead cancel date:   
 Original FSE: KL2, Job cancel date:   
 Service: MOW REGULAR, Source:   
 Original service: MOW REGULAR, Booked: 22/04/04 17:13:03 by AmandaE

Notes: 5/05/04 13:15:13 JHIS (click here to enter a new note...)   
 Changed service code to indicate what customer did want. was initially entered in error.

Address Person Send message Past messages History Save Cancel



**Lead Cancel**

If the franchisor wants to cancel a lead – follow procedure below:

- find job – click on details
- click on Status & Select cancel from drop down box.
- date will automatically appear against Lead cancel date.
- click save.

Current franchisee details: S M T W T F S, P P P P P P P, Phone: 0421616738

Reallocation: Reallocate to TH4, Reallocate to someone else...

Details: Status: OK, Price: Regular?    
 Current FSE: CD5, Due date: 08/12/2003 08:00:00   
 Previous FSE:   
 Picked up by:   
 Original FSE: CD5, Lead cancel date:   
 Job cancel date:   
 Service: MOW REGULAR, Source: Newspapers   
 Original service: MOW REGULAR, Booked: 7/12/2003 5:39:07 PM by test

Notes: 7/12/2003 5:44:31 PM test Notes: client requested CD5   
 (enter new note...)

Address Person Send message Past messages History Save Cancel



If the franchisee wants to cancel his regular client – follow procedure below:

- take the tick off regular
- click save. The date, time and person will automatically be recorded by FMS4.

Current franchisee details

S	M	T	W	T	F	S
P	P	P	P	P	P	P

Phone: 0421616738

Reallocation

Reallocate to TH4      Reallocate to someone else...

Details

Status:       Price:       Regular?

Current FSE:       Due date:

Previous FSE:       Transfer date:

Picked up by:       Lead cancel date:

Original FSE:       Job cancel date:

Service:       Source:

Original service:       Booked: 7/12/2003 5:39:07 PM by test

Notes

7/12/2003 5:44:31 PM	test	Notes: client requested CD5
...	...	[enter new note...]

Address    Person    Send message    Past messages    History    Save    Cancel

### Sending messages about jobs

To send a message about a job, click “Send message” either from the “Find Jobs” screen, or alternatively from the “Job Detail” screen.

The details of the job will appear on the page plus the Franchisee code, name, mobile phone number and his Work Requirements By placing the cursor at the end of the details you can type in the message for the franchisee click send as message.

Send message

To: LP4 - TOULA GEORGE - 0421635915      Change recipient (F11)

Message: 65 character(s) left

JEAN LINDSAY,28 DONALD ST.,CROYDON 3136(51 84) 97229920,MOW-REG,22/9 14:17 (CAROLES)]

Work needed: 

W	T	F	S	S	M	T
P	P	P	P	P	P	P

Change name:       Change phone:

Send as message (F3)    Send as job (F8)    Send as complaint (F9)    Send as appreciation (F10)    Cancel (Esc)

**NOTE**

FMS has an automatic counter and will show how many characters are available for additional message.

### Send As Complaint

To send a complaint

- Find job
- Go to job details
- In notes section type in all details of complaint
- click save.
- Type message in e.g. CLI NOT HAPPY WITH JOB PH CLI URG
- Click “send as a complaint” please remember you will need to leave 11 characters as it



will automatically put the word complaint at the front of the job. This will be logged against the Franchisee.

### Send As Appreciation

To send as appreciation

- Find job
- Go to job details
- In notes section type in all details of appreciation
- Click Save
- Type message in e.g. GOOD JOB WELL DONE CL VERY HAPPY
- Click “send as appreciation”. Please remember you will need to leave 9 characters as it will automatically put the words “well done” at the front of the job. This will be logged against the Franchisee.

### To reallocate A Job

If the client requests another franchisee once you have sent the complaint to the original franchisee

...

- Select either reallocate to (fse) or reallocate to someone else.
- send message as a “job”..

The screenshot shows a software window with the following sections:

- Current franchisee details:** A calendar grid showing days of the week (S, M, T, W, T, F, S) and a phone number field containing '0421616738'.
- Reallocation:** Two buttons: 'Reallocate to TH4' and 'Reallocate to someone else...'. A red arrow points to the second button.
- Details:** A grid of fields including:
  - Status: dropdown menu with 'OK' selected.
  - Current FSE: dropdown menu with 'CD5' selected.
  - Previous FSE: dropdown menu.
  - Picked up by: dropdown menu.
  - Original FSE: dropdown menu with 'CD5' selected.
  - Service: dropdown menu with 'MOW REGULAR' selected.
  - Original service: dropdown menu with 'MOW REGULAR' selected.
  - Price: input field.
  - Due date: date-time picker showing '08/12/2003 08:00:00'.
  - Transfer date: dropdown menu.
  - Lead cancel date: dropdown menu.
  - Job cancel date: dropdown menu.
  - Source: dropdown menu with 'Newspapers' selected.
  - Booked: text field showing '7/12/2003 5:39:07 PM by test'.
  - Regular?: checked checkbox.
- Notes:** A text area with a timestamp '7/12/2003 5:44:31 PM' and the text 'test'. Below it, a note says 'Notes: client requested CD5 (enter new note...)'. There is a scroll bar on the right.
- Buttons:** A row of buttons at the bottom: 'Address', 'Person', 'Send message', 'Past messages', 'History', 'Save', and 'Cancel'.

### CALL CENTRE ABBREVIATIONS:

Please find following the abbreviations for commonly used words in messages from the call centre:

Administration	admin
After	afta
Arrange	arr
As soon as possible	asap
Before	b4
Business number	b or bus
Cancel	cncl
Cancelled	cnclcd
Client	cl
Do not	dnt
Double storey	d/story or 2story
Estimated time of arrival	eta
For	4
Franchisee	fse
Franchisor	fso
Have	hv
Home number	h
Hours	hrs

Information	info
Large	lge
Mobile	mob
Phone	phn or ph
Please	pls or pl
Possible	poss
Quote	q
Regarding	re
Single storey	s/story or 1story
Small	sml
Thanks	thnx
To	2
Today	2day
Tomorrow	2moro
Urgent	urg
Why	y
You	u
Your	ur

### ENTERING PICK UP'S

This screen is designed for Franchisees who have picked up their own work away from the call centre / FMS 4.

The definition of a 'pick up' is a client that has been independently sourced outside Admin Centre, i.e. a referral. The Pick up Entry screen can be accessed by selecting the "Jobs" menu, then moving cursor to "Enter pickups..."

Enter Franchisee's code in **Picked Up By** box select service and enter client's details. Click on Log pick up.

**PICK-UPS ENTRY**

Previous jobs at this address: (none found) View... (F5)

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Picked up by:

Service:

Suburb:

Address:

Price:

Client's name:  Phone:  Mobile:  BH:

Internal notes:

Message to FSE?  150

**NOTE**

There is no lead fee charged for a 'pick up'.

Pick up registration is used to keep a record of the clients in FMS, the purpose being the ability to register client details – it is important to maintain continuity with clients. The risk of not registering a client is that should the client contact an Admin Centre, there is no guarantee the client will be directed to the right Franchisee.

It is the responsibility of the franchisor to get a pick up list from each Franchisee and enter into FMS on a monthly basis.