FRANCHISEES

Setting up a new franchisee in FMS

- To set up a new franchisee
- Click on "Franchisees" from menu
- Select "Enter a new franchisee..."

When you have set up your franchisee, please fill in "New Franchisee Admin Centre set up form" and fax or e-mail your local administration centre for them to enter territory and check set up.
http://www.franchisors.jims.net/documents/Franchisee%20Documents/Sign%20Ups/Sign%20Up%20F orms/Pre%20Sign%20Up%20Documentation/Information%20for%20Admin%20Centres%20New%20 Franchisee.doc

Franchisor can set up own Franchisee's in FMS 4
Click on the drop down screen and select your appropriate region. Enter in First Name of the Franchisee. If the Franchisee wishes to be known by preferred name, type in name and then surname. FMS automatically allocates the franchisee's code. Once a code has been assigned, click continue.

Entering franchise details

The screen will look like that shown below:

You will need your sign up documentation for the following ;

Notice the Franchisee code just created has now been assigned to the Franchisee in FMS.
Enter the name e.g. Jim's Mowing (Cheltenham), date the contract was executed, start date, if work availability guarantee is applicable and paging company and mobile number.

Entering Contact details

Click on the address tab at the bottom left hand corner, enter franchisee's address. If P.O. Box, click on the box Use different postal address, a box will appear: are you sure you want to create a separate postal address – click Yes, enter suburb, type in P.O. Box number, click Save.

People
To enter the franchisee's contact details such as name, phone, or email, click "People". This brings up the "Personnel" screen, Double-click on Franchisee Name e.g. John Smith.

Enter Franchisees name, home phone, mobile, fax/e mail and birth date & Click Save.

Specifying services

Click on the "Services" This is the screen used to assign services that the franchisee has nominated. Click in the box next to the services that have been nominated and press the "Add" button. When completed the services ticked on the right will transfer to the left hand box. The screen should look like that shown below:

To enter the fixed fee, click on the service on left hand side enter the fixed fee amount, (the fixed fee amount should be excluding GST) do this on all services and click Save.
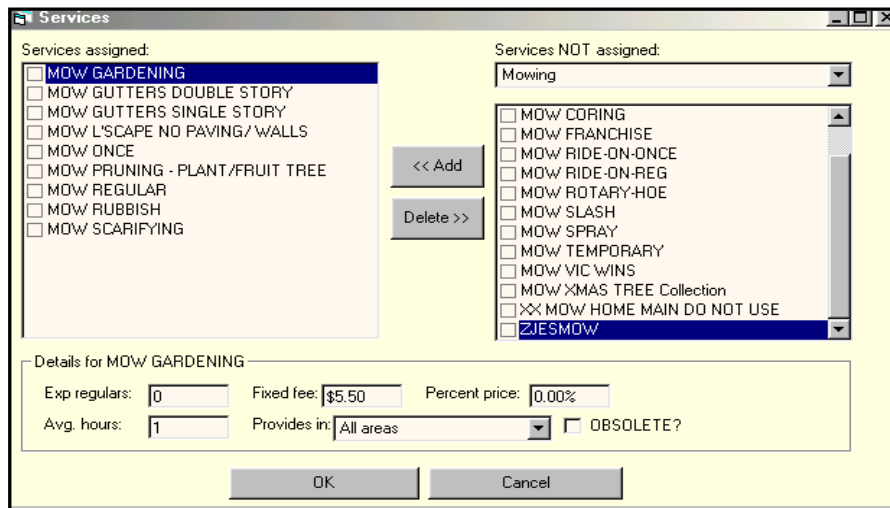
To delete services select the service under "Services assigned from left hand side place a tick in the corresponding box click "Delete". (However, deleting services is NOT recommended. FMS4 allows you to mark them "OBSOLETE" instead, which is safer)

You will be asked are you sure you want to delete these services click OK, FMS will then search data base if there are any jobs attached to that service FMS will not allow you to delete that service you will need to make it obsolete. If there are no jobs attached then the service will be deleted.
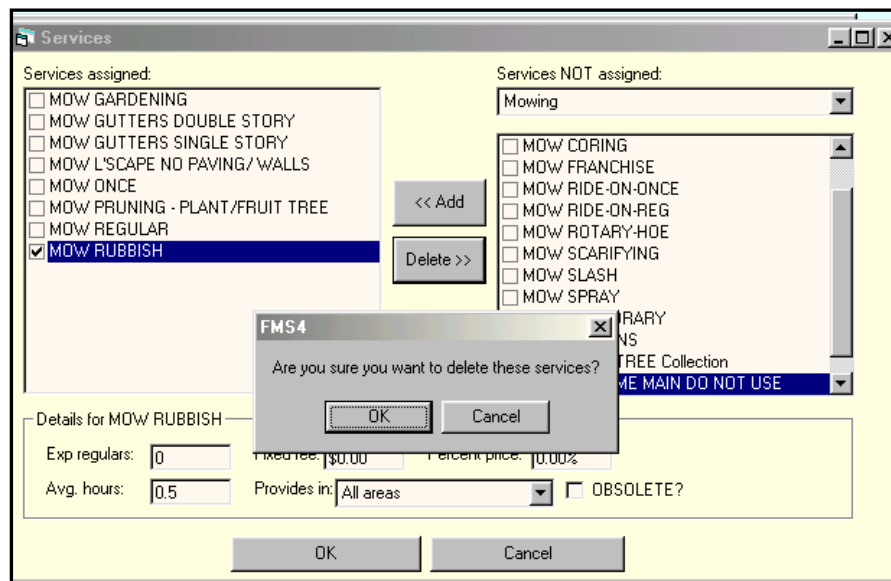
Work Needed
Default Work Requirements are employed by Franchisors to ensure their Franchisees do not forego any work from the Administration Centre. If a Franchisee does not ring the Admin Centre to activate work requirements, FMS will automatically revert to the nominated default code that was set up initially.

To enter default and time worked, which the franchisee nominated at sign up, click on work needed place your curser under column C next to Monday click and hold down left mouse button drag through to Saturday and enter 0 (zero) or W (WAITING FOR WORK REQUIREMENTS). To put in hours worked click on 8 against Monday hold down left mouse button drag through to 6 and down to Saturday. This will create box with black line, then press the space bar – the box will then go green. Press close. (the hours above are just examples you can select any hours or days that the franchisee wishes to work)
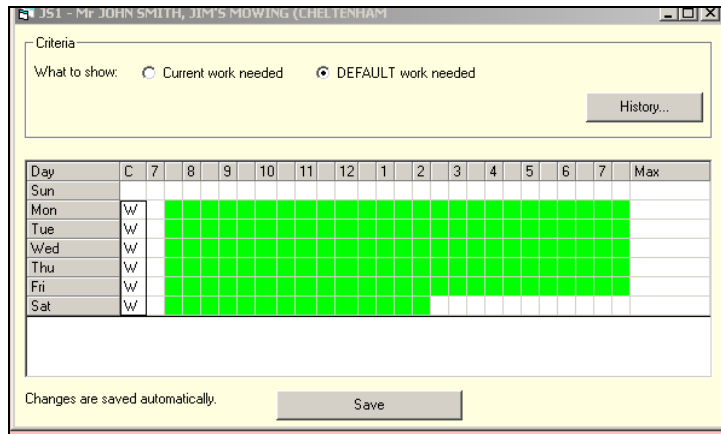
AREA CODES

A = All Areas
All areas requested; including regular and casual clients previously serviced

L = Local Areas
Local Areas requested; including regular, casual clients and previous serviced clients as well (* Territory will be added to Local under the default mechanism)

T = Territory
Territory; includes regular and casual clients that the Franchisee have previously serviced.

H = Holidays
Holidays; Franchisee is unable to be contacted, DO NOT SEND ANY MESSAGES OR JOBS

P = Previous Clients
Previous serviced clients. This allocation not for new leads.

S = Sick
Sick: Franchisee not working. DO NOT PAGE ANY JOBS or CLIENT MESSAGES.

W= Waiting
Waiting for work requirements; Franchisee has not nominated their work requirements (for next 10 days)

0 = No New Leads
No new leads; will take messages regarding current REGULAR clients and booked in advance jobs.

C = Caretaking
Caretaking: Franchisee unable to take pages or service clients. Clients have been temporarily reallocated to another Franchisee.

N = Nothing
No communication on any matter.

AREAS
Setting up Territory Description
- Click areas.
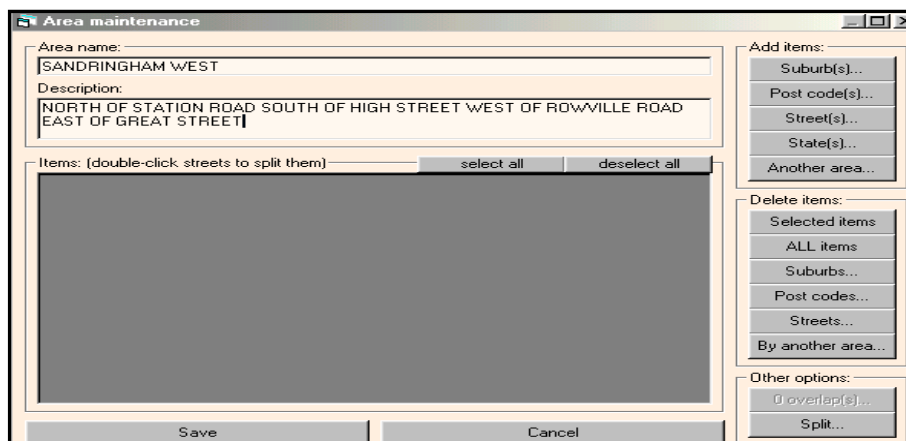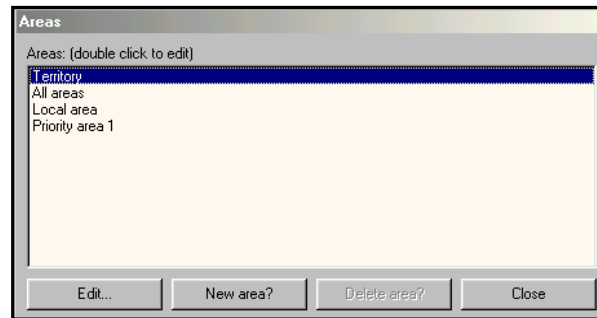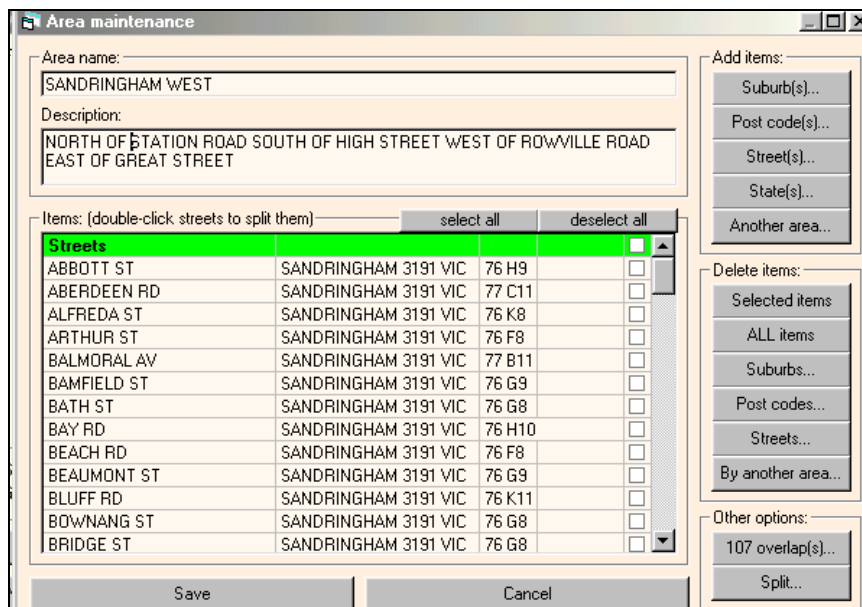- Select & double click on Territory
- Enter Territory name into Area name field
- Enter the description of the Territory
- Click Save.

- Your administration centre sets up the actual territory.

Areas

Areas: (double click to edit)
```
Territory
All areas
Local area
Priority area 1
```

[Edit...] [New area?] [Delete area?] [Close]

Area maintenance

Area name:
SANDRINGHAM WEST

Description:
NORTH OF STATION ROAD SOUTH OF HIGH STREET WEST OF ROWVILLE ROAD EAST OF GREAT STREET

Items: (double-click streets to split them)   [select all]   [deselect all]

Add items:
- Suburb(s)...
- Post code(s)...
- Street(s)...
- State(s)...
- Another area...

Delete items:
- Selected items
- ALL items
- Suburbs...
- Post codes...
- Streets...
- By another area...

Other options:
- 0 overlap(s)...
- Split...

[Save]   [Cancel]

Once the Administration Centre has set up the territory it will look like the screen shown below:

Area maintenance

Area name:
SANDRINGHAM WEST

Description:
NORTH OF STATION ROAD SOUTH OF HIGH STREET WEST OF ROWVILLE ROAD EAST OF GREAT STREET

Items: (double-click streets to split them)   [select all]   [deselect all]

Streets			
ABBOTT ST	SANDRINGHAM 3191 VIC	76 H9	☐
ABERDEEN RD	SANDRINGHAM 3191 VIC	77 C11	☐
ALFREDA ST	SANDRINGHAM 3191 VIC	76 K8	☐
ARTHUR ST	SANDRINGHAM 3191 VIC	76 F8	☐
BALMORAL AV	SANDRINGHAM 3191 VIC	77 B11	☐
BAMFIELD ST	SANDRINGHAM 3191 VIC	76 G9	☐
BATH ST	SANDRINGHAM 3191 VIC	76 G8	☐
BAY RD	SANDRINGHAM 3191 VIC	76 H10	☐
BEACH RD	SANDRINGHAM 3191 VIC	76 F8	☐
BEAUMONT ST	SANDRINGHAM 3191 VIC	76 G9	☐
BLUFF RD	SANDRINGHAM 3191 VIC	76 K11	☐
BOWNANG ST	SANDRINGHAM 3191 VIC	76 G8	☐
BRIDGE ST	SANDRINGHAM 3191 VIC	76 G8	☐

Add items:
- Suburb(s)...
- Post code(s)...
- Street(s)...
- State(s)...
- Another area...

Delete items:
- Selected items
- ALL items
- Suburbs...
- Post codes...
- Streets...
- By another area...

Other options:
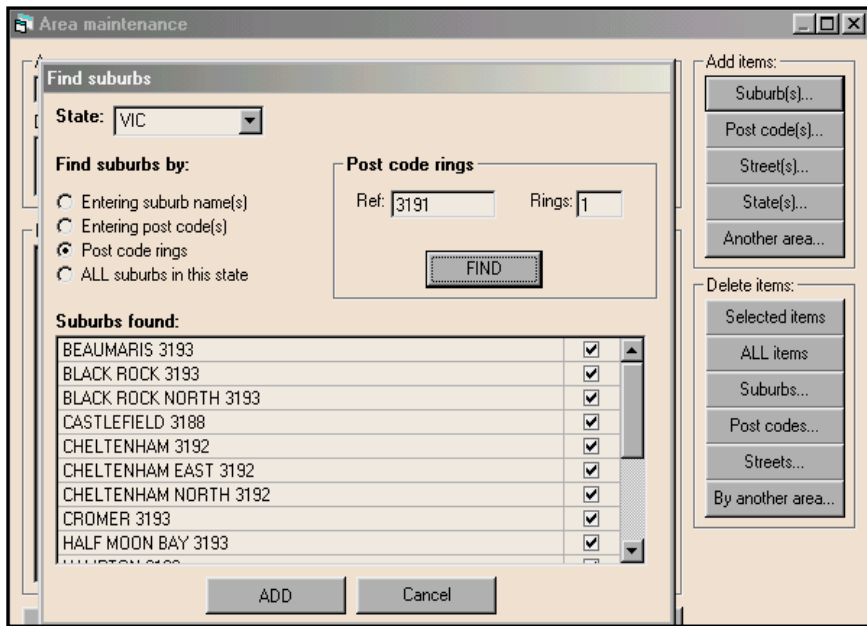- 107 overlap(s)...
- Split...

[Save]   [Cancel]

Setting up local area

- Click Areas.
- Select & Highlight local area - double click.
- Select Suburbs
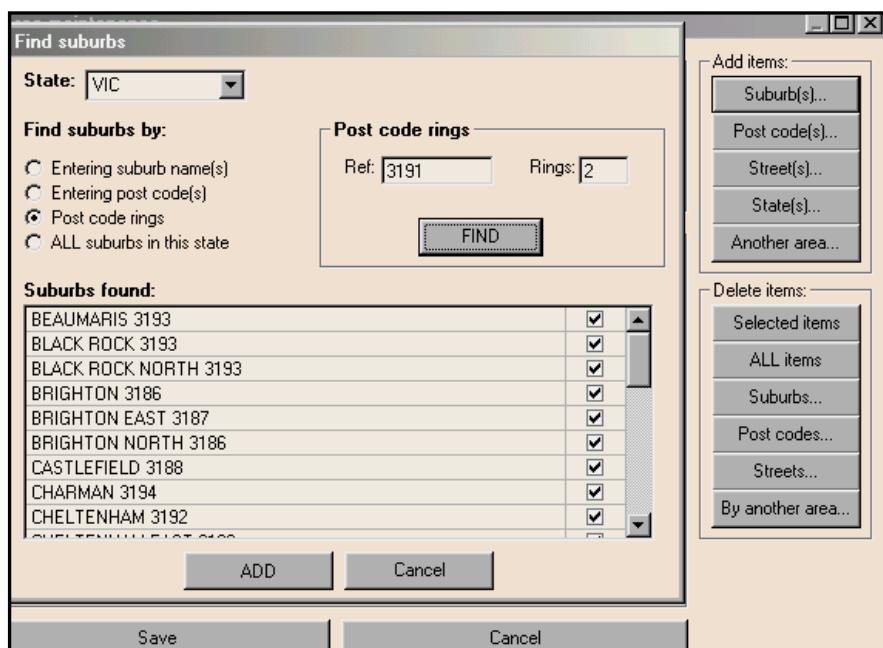- Click on Post code Rings & type post code next to ref

- Next to rings enter 1, click find. Click Add then save.

Setting up All Areas

Go back into Areas, Highlight all areas, double click. Select Suburbs click on Post code Rings & type post code next to ref and next to rings enter 2, click find. Click Add then save.

Setting up Post Code Priority

This is used to help franchisees that have just started and are on WAG.

- Go back into areas highlight priority area 1, double click
- Click on post codes top right hand side.
- Enter your selected 3 post code rings e.g. 3191,3192,3193 there should be no spaces only comma's after each postcode
- Click add press Save.
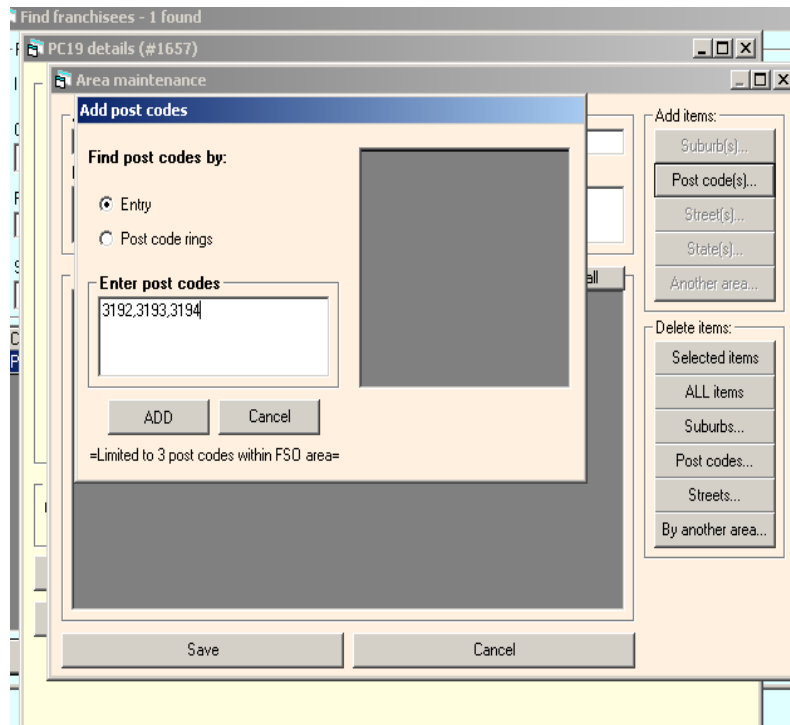
BILLING

To enter Franchisee fees, select "Billing" from the "Details" screen. The screen will look like that shown below.
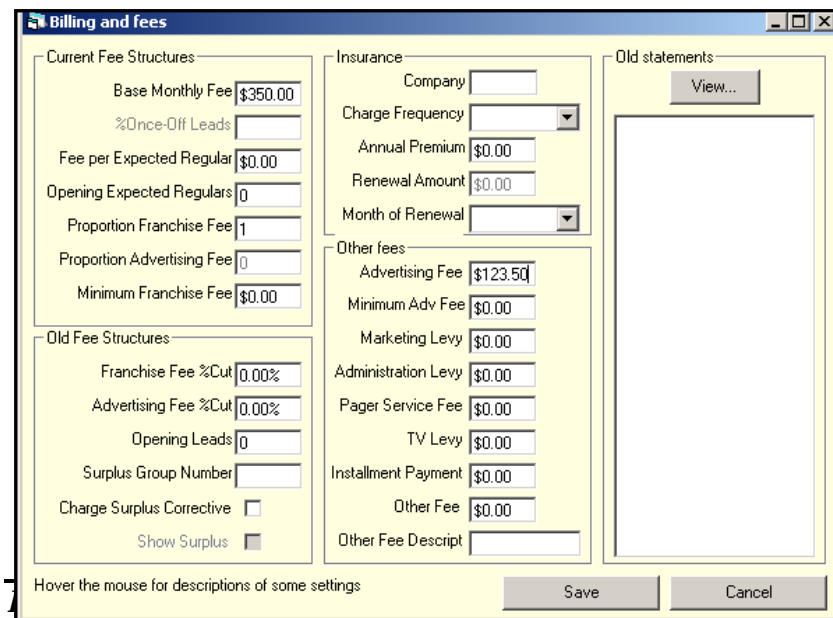
This screen describes a Franchisee's fee breakdown, Base monthly fee, and Advertising fee. Make sure that proportion franchise fee is 100.00%. Click Save.
NOTE: ALL PRICES EXCLUDING GST

Entering other details – Miscellaneous Details
Select "Miscellaneous" on the "Detail" Screen. Details such as ACN, Company Name, trainers that provided initial assessments, newspapers. Source if Split, Resale, or New previous owners of the franchise, purchase price, Car and Trailer registration numbers are entered via the Miscellaneous Details screen. Click OK to save.

You have now completed entering a franchisee click Save.You will need to Exit out of FMS
and then get back in to view the details entered.

The following section will explain what you can do under the Franchisee detail screen.