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## 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%20Forms/Pre%20Sign%20Up%20Documentation/Information%20for%20Admin%20Centres%20New%20Franchisee.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.

The screenshot shows a 'New franchisee' dialog box with the following details:

- Franchisor: JIM'S MOWING (SOUTH BAYSIDE)
- State: VIC
- First name: JOHN
- Preferred first name: (empty)
- Surname: SMITH
- FSE code: JS1

Buttons: Continue..., Cancel

### Entering franchise details

The screen will look like that shown below:

|                       |                          |                 |               |
|-----------------------|--------------------------|-----------------|---------------|
| Franchise details     |                          | Contact details |               |
| Franchisee code:      | JS1                      | Manager:        | JOHN SMITH    |
| Franchise name:       |                          | Mobile:         |               |
| Franchisor:           | JIM'S MOWING (SOUTH BAY) | Phone:          |               |
| State:                | VIC                      | Fax:            |               |
| Status:               | OK                       | Owner 1:        | <none>        |
| Contract signed:      |                          | Owner 2:        | <none>        |
| Started:              | 27/09/2004               | Spouse:         | <none>        |
| Finished:             |                          | Send stuff to:  | JOHN SMITH    |
| WAG:                  | None                     | Paging company: |               |
| WAG value:            |                          | Paging number:  |               |
| Stats                 |                          |                 |               |
| Gross regular return: | Surplus:                 | Leads:          | Regulars:     |
| Transfer:             |                          |                 |               |
| Address               | People                   | Services        | Work needed   |
| Areas                 | Billing                  | Miscellaneous   | Past messages |
| Notes                 | Complaints               | Save            | Cancel        |

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.

|                       |  |                 |               |
|-----------------------|--|-----------------|---------------|
| Franchise details     |  | Contact details |               |
| Franchisee code:      | JS1  | Manager:        | JOHN SMITH    |
| Franchise name:       | JIM'S MOWING (CHELTENHAM)                      | Mobile:         |               |
| Franchisor:           | JIM'S MOWING (SOUTH BAY)                       | Phone:          |               |
| State:                | VIC  | Fax:            |               |
| Status:               | OK   | Owner 1:        | <none>        |
| Contract signed:      | <input checked="" type="checkbox"/> 22/09/2004 | Owner 2:        | <none>        |
| Started:              | <input checked="" type="checkbox"/> 27/09/2004 | Spouse:         | <none>        |
| Finished:             |  | Send stuff to:  | JOHN SMITH    |
| WAG:                  | None   | Paging company: | OptusMobile   |
| WAG value:            | \$880.00                                       | Paging number:  | 0411709933    |
| Stats                 |  |                 |               |
| Gross regular return: | Surplus:                                       | Leads:          | Regulars:     |
| Transfer:             |  |                 |               |
| Address               | People   | Services        | Work needed   |
| Areas                 | Billing  | Miscellaneous   | Past messages |
| Notes                 | Complaints                                     | Save            | Cancel        |

## 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.

**Address maintenance**

Residential address

Suburb: CHELTENHAM 3192 VIC  
Unit:                      Street #: 46  
Street: STANLEY AV  
Line 1:

Use different postal address?

Suburb: CHELTENHAM 3192 VIC  
Unit:                      Street #:                       
Street:                       
PO BOX: P.O. BOX 183

People (double click for details...)  
JOHN SMITH  
(spouse)

Notes  
...                      ...                      (click here to enter a new note...)

Save                      Cancel

## 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.

**JS1 details (#9740)**

Franchise details

Franchisee code: JS1  
Franchise name: JIM'S MOWING (CHELTENHAM)  
Franchisor:  
State:  
Status:  
Contract sign  
Started:  
Finished:  
WAG:  
WAG value:

Contact details

Manager: JOHN SMITH  
Mobile:

People

People in this franchise: (double click to edit)  
JOHN SMITH  
(spouse)

Edit...                      New person?                      Delete person?                      Close

Stats

Gross regular return:                      Surplus:                      Leads:                      Regulars:                      Transfer

Address                      People                      Services                      Work needed                      Areas                      Billing

Miscellaneous                      Past messages                      Notes                      Complaints                      Save                      Cancel

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

The screenshot shows a window titled "Person details" with the following fields and values:

- Title: Mr
- First name: JOHN
- Surname: SMITH
- Home phone: 97211245
- Work phone: (empty)
- Mobile: 0411709933
- Fax: 97211246
- Email: hns@optusnet.com.au
- Birth date: 13/09/1990

The "Notes" section contains a text area with the text "(click here to enter a new note...)" and "Save" and "Cancel" buttons at the bottom.

### 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:

The screenshot shows a window titled "Services" with two main sections:

- Services assigned:** (Empty list)
- Services NOT assigned:** (List of services with checkboxes):
  - Mowing
  - MOW GARDENING
  - MOW GUTTERS DOUBLE STORY
  - MOW GUTTERS SINGLE STORY
  - MOW L'SCAPE NO PAVING/WALLS
  - MOW ONCE
  - MOW PRUNING - PLANT/FRUIT TREE
  - MOW REGULAR
  - MOW RIDE-ON-ONCE
  - MOW RIDE-ON-REG
  - MOW ROTARY-HOE
  - MOW RUBBISH
  - MOW SCARIFYING

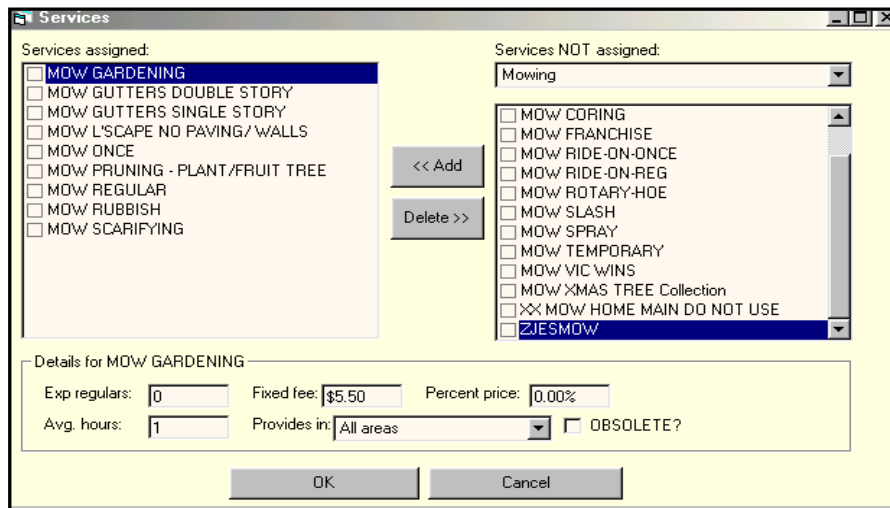
Buttons: "<< Add", "Delete >>".

Details for ...:

- Exp regulars: (empty)
- Fixed fee: (empty)
- Percent price: (empty)
- Avg. hours: (empty)
- Provides in: (empty)
- OBSOLETE?

Buttons: "OK", "Cancel".

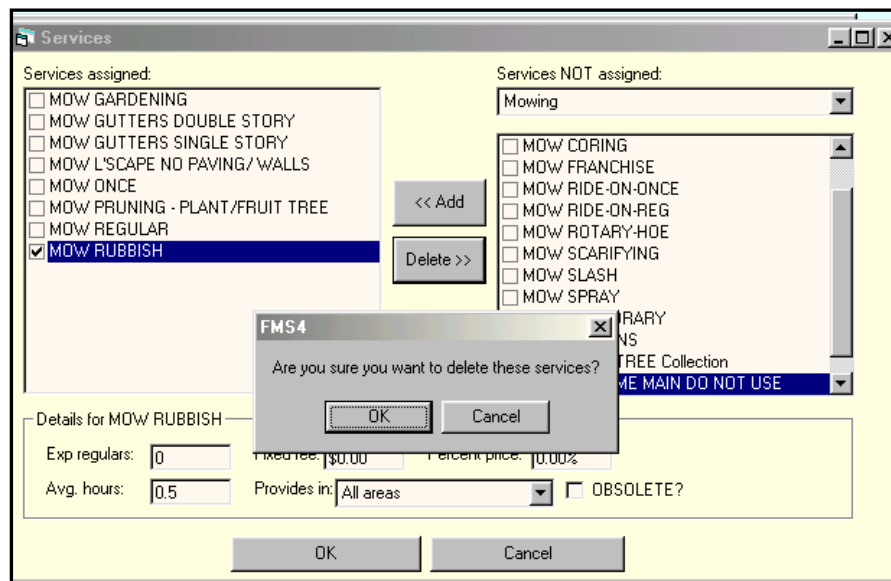
To enter the fixed fee, click on the service on left hand side enter the fixed fee amount, (the fixed fee amount should be excluding GST) do this on all services and click Save.



To delete services 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)

**ACTION**

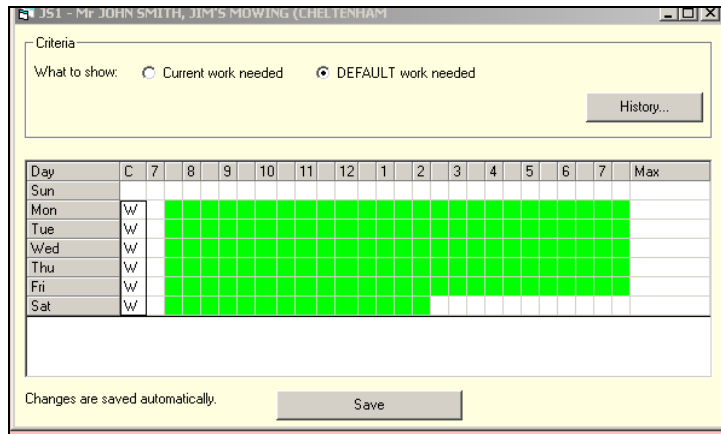
You will be asked are you sure you want to delete these services click OK, FMS will then search data base if there are any jobs attached to that service FMS will not allow you to delete that service you will need to make it obsolete. If there are no jobs attached then the service will be deleted.



**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 cursor 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**

**NOTE**

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

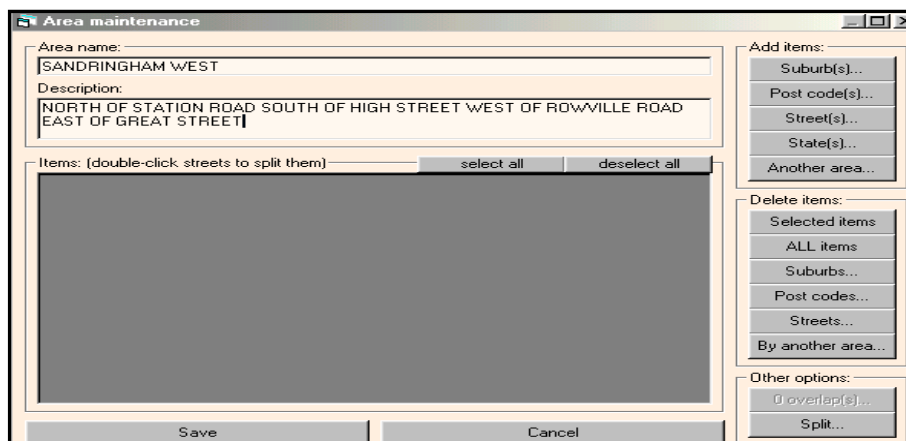
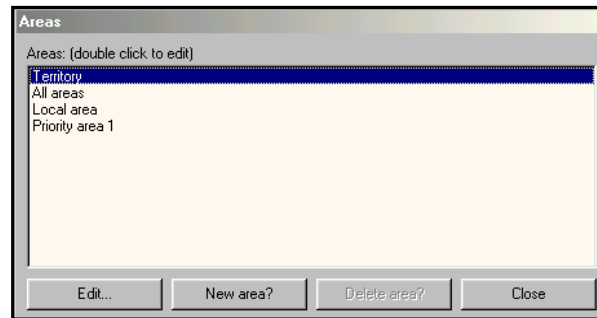
No communication on any matter.

### AREAS

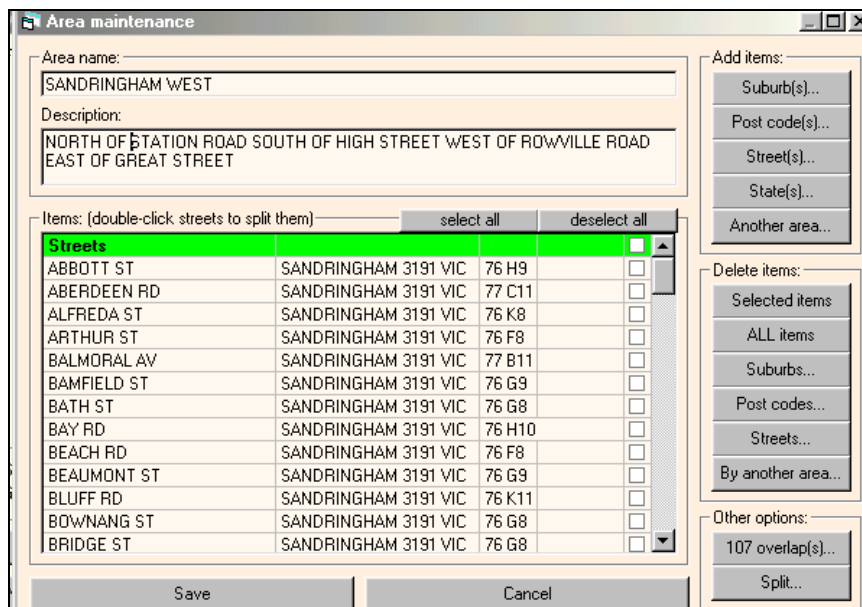
#### Setting up Territory Description

- 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.



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

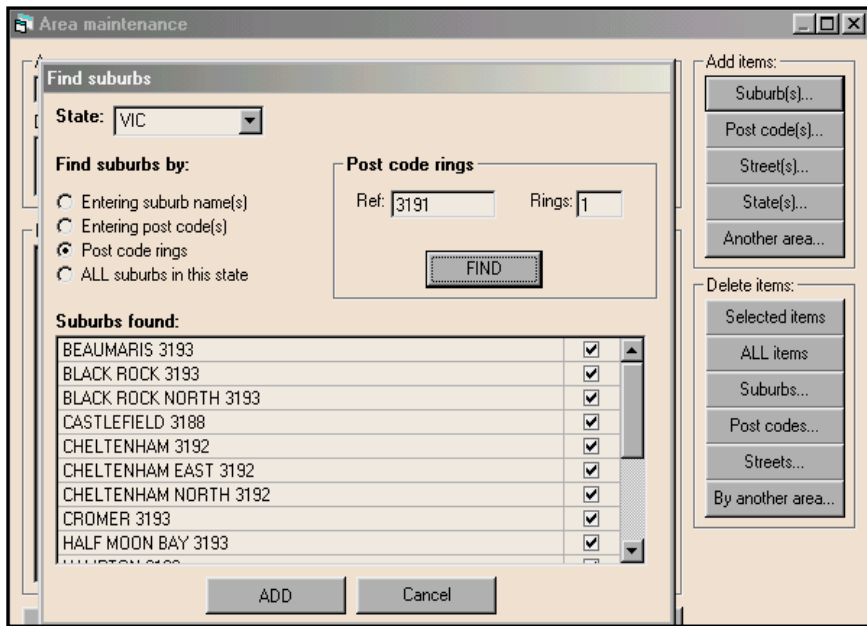


### Setting up local area

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

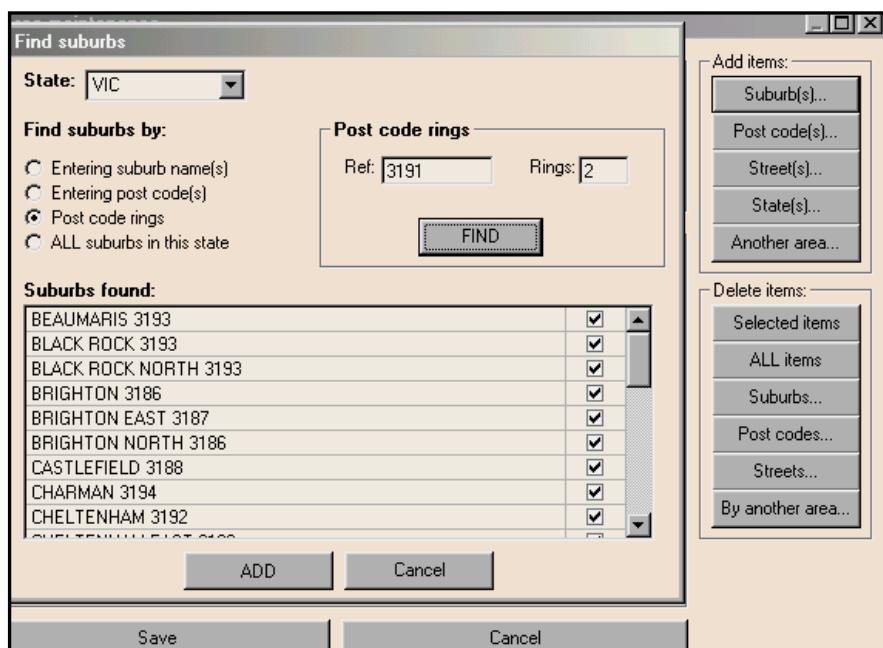


- Next to rings enter 1, click find. Click Add then save.



### Setting up All Areas

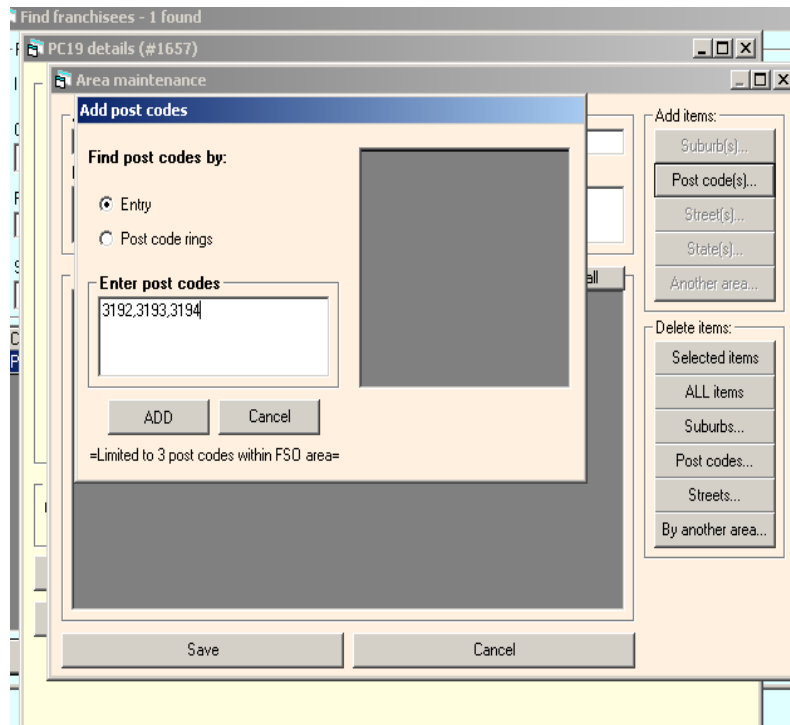
Go back into Areas, Highlight all areas, double click. Select Suburbs click on Post code Rings & type post code next to ref and next to rings enter 2, click find. Click Add then save.



### Setting up Post Code Priority

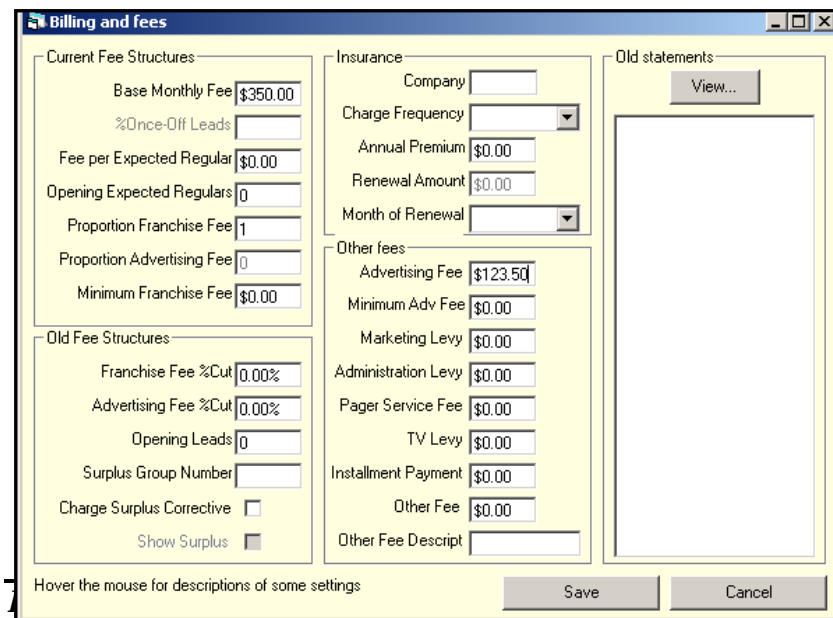
This is used to help franchisees that have just started and are on WAG.

- 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. 3192,3193,3193 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.

**Franchisee other details**

Miscellaneous details

Company?  Company name: MITH ENTERPRISES PTY LTD

ACN: 101 269 269

ABN:

Training date:

Trainers: GP

Newspapers: LEADER

Special skills:

Territory details

Previous owner:

Source: New

Clients purchased:

Purchase price: 16000.00

Allocation

FSE will call client within 2 hours

FSE will quote client at given time

Get previous clients outside normal areas?

Registration numbers

Vehicle: SFL 123 Trailer: DGH 876

Save Cancel

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.

FRANCHISEES search criteria:

I'm looking for:  Current franchisees  Finished franchisees  All franchisees

CODE: JS1

JS1 details (#9740)

| Franchise details: |                           | Contact details: |               |
|--------------------|---------------------------|------------------|---------------|
| Franchisee code:   | JS1                       | Manager:         | Mr JOHN SMITH |
| Franchise name:    | JIM'S MOWING (CHELTENHAM) | Mobile:          | 0411709933    |
| Franchisor:        | JIM'S MOWING (SOUTH BAY)  | Phone:           | 97211245      |
| State:             | VIC                       | Fax:             | 97211246      |
| Status:            | OK                        | Owner 1:         | <none>        |
| Contract signed:   | 22/09/2004                | Owner 2:         | <none>        |
| Started:           | 27/09/2004                | Spouse:          | <none>        |
| Finished:          |                           | Send stuff to:   | Mr JOHN SMITH |
| WAG:               | Yes                       | Paging company:  | OptusMobile   |
| WAG value:         | \$880.00                  | Paging number:   | 0411709933    |

Stats:

Gross regular return:  Surplus:  Leads:  Regulars:  Transfer:

Address People Services Work needed Areas Billing

Miscellaneous Past messages Notes Complaints Save Cancel

FSD details...

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