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# FINDING FRANCHISEES

# Individual Franchisee Details

Finding a franchisee is done by selecting the "Franchisees" menu, and highlighting "Find a franchisee" or by clicking "Find Franchisee" on the toolbar. Enter the Franchisees code click search (if you do not know code you can search by name) then click details.

			-		
Find	franchisees - 1 found				
FRANC	HISEES search criteria:				
l'm look	ing for: 🙃 Current franchisees 💦 🤇	Finished franci	hisees 🛛 🧿 All francl	hisees	
CODE:	Franchisor:	C	Division:		
AC14	JIM'S MOWING (SOUTH BA	YSIDE)		Search (F)	1
First na	me: Surname:	Mobile:			5)
				Clear (F2)	
Service	provided: Territory:		Vehicle registration:		
	-				
Code	Name	Mobile	Franchise		Started
AC14	Mr ALLAN CLARKE	0411123456	JIM'S MOWING (SAN	NDRINGHAM WEST)	5/05/04
•					
Del	tails Work needed Send of	chat Pastim	essages Billing	Group page	FSO details

#### Franchisees within a Region

If you wish to view all your Franchisees select "Find a franchisee" or by clicking "Find Franchisee". Under Franchisor select your region and click search a list of all your Franchisees will appear, highlight the Franchisee you wish to look at and click details.

膏 F	ind fi	anchis	ees - 42 found								_	
FB	ANCH	HISEES	search criteria: —									
l Pm	looki	a for	Current franchi		Cinial	ned franch		All franchi				
''''	IUUKI	ig ioi.	Current narioni	sees 🜔	FINIS	neu trancr	lisees		sees			
CO	IDE:		Franchisor:			D	ivision:					
B	B11	-	JIM'S MOWING (	SOUTH BAY	'SIDE)	-			-	1		
			1		,					Search (F:	3)	
Fire	st nam	ie:	Surname:		Mobil	e:		_		š		
										Clear (F2)		
		provided	t Ter	ritory:			Vahiala	registration:		ciear (r 2		
	INCE	provided		ntory.			Venicie	registration.		· · · · · · · · · · · · · · · · · · ·		
Coo	le	Name			Mobil	е	Franchis	e			Started	
BB.	11	BEN BI	ENTLEY		0423	778317	BEN SIN	ION BENTLE'	Y 👘		9/02/04	
BD:	-	Mr BRA	ADLEY WARREN I	DART	0409	964298	JIM'S M	OWING (MEN	TONE	CENTRAL)	29/10/01	
BH	5	Mr BRE	ETT ANTHONY HU	INTER	0401	989125	Jim's Mo	wing (MOORA	BBIN	CENT'L)	2/10/00	
BM	20	Mr BRE	ETT MCCLELLAND		0419	332096	JIM'S M	OWING (BEN1	TLEIG	H EAST B)	18/07/03	
CCE	5	CHRIS	JARRETT & CATH	IY HOUGH	0413	747827	JIM'S M	OWING (KEYS	BOR'	H WEST)	4/05/98	
DB	18	Mr DES	S BUCKLEY		0403	256576	JIM'S M	OWING (CLAY	'TON	SOUTH A)	10/09/01	
DG	5	GRAHA	AM MCCONCHIE		0409	864008	JIM'S M	OWING (DING	iLEY)		21/02/94	
GC	10	Mr GE0	OFF CLAYTON		0411	571311	JIM'S M	OWING (MEN	TONE	WEST)	2/04/02	
GD	-	Mr GLE	NN IAN DOWNIE		0412	584236	JIM'S M	OWING (KEYS	BOR	DUGH A)	29/10/01	
GP!	-	GREG	PUZZOLO		0418	145382	JIM'S M	OWING (BEAU	JMAR	S WEST)	12/01/98	
GP	М	Mr GRE	EG PUZZOLO		0418	145382	Jim's M	owing (South B	ayside	e)	12/01/98	-
•												•
	Deta	ils	Work needed	Send cł	nat	Past me	essages	Billing		Group page	FSO deta	iils

#### **Detail Screen**

膏 AC14 details (4	#8720)			
Franchise details-		Contact details		
Franchisee code	× AC14	Manager:	Mr ALLAN CLAR	KE 🔽
Franchise name:	JIM'S MOWING (SANDRINGHAM	Mobile:	0411123456	
Franchisor:	JIM'S MOWING (SOUTH BAY 💌	Phone:	97211245	
Status:	ОК	Fax:	97211246	
Contract signed:	03/05/2004 💌	Owner 1	<none></none>	▼
Started:	☑ 05/05/2004 ▼	Owner 2:	<none></none>	▼
Finished:		Spouse:	<none></none>	<b>T</b>
WAG:		Send stuff to:	Mr ALLAN CLAR	KE 🔽
WAG value:		Paging company:	OptusMobile	-
WAU Value.	\$880.00	Paging number:	0411123456	
Stats Gross regular retur	n: Surplus: Leac	ls: Regulars:	Transfe	r <b>IIII</b>
Address	People Services	Work needed	Areas	Billing
Miscellaneous	Past messages Notes	Complaints	OK	Cancel

#### People

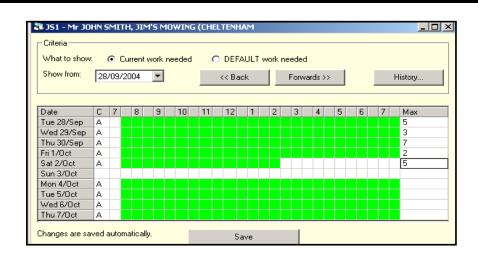
A Franchisee may have employees and under People you can enter their details. Click on People then click on New Person enter details and click save.

### Work Needed

The Franchisee may phone you with his work requirements for the week; go into Work Needed under column C enter his work requirements.

#### **Max Leads**

If a Franchisee has nominated "all areas" but requests a finite number of jobs, access the max column by highlighting and entering a number. On the work needed screen, in the Max column, highlight the days you want to set and type a number from 1 to 9 and click close. Once the franchisee has received the nominated number of jobs, FMS will then treat as if on 'N'



## History

Go into Work Needed on the right hand side click on History you will be asked to select a date range then click ok.

Criteria What to show	. (	•	Cu	rren	t wo	ork	neede	d	c	DEF	AUL	Τw	ork	nee	ded							
Show from:	57	/05	/04	ŀ		-				<< Ba	ack			F	orw.	ards	>>			H	listory	
Date C 7 8 9 10 11 12 1 2 3 4 5 6 7 Max																						
Wed 5/May	A																					
Thu 6/May	Α																					
Fri 7/May	A																					
Sat 8/May	0																					
Sun 9/May	0					I	listor	y fo	r PC	C19												
Mon 10/May	0						- Date	a ran														
Tue 11/May	0								ige	_							_					
Wed 12/May	0						Fre	om:			/04	/04					-					
Thu 13/May	0						To	r			2.05	20.4	_		-		-	1				
Fri 14/May	0										7703	704					-	1				

Mor	k roquir	amonte history for	- PC19 from 5/04/04 to	5/05/04	
VVUI	Krequit	ements history for	PC 19 11011 5/04/04 10	13/03/04	
Date	Code	Requirements	Max leads Entered by	Date entered	
5/05/04	A	7:00-20:00	GenevieveB	28/04/04 15:37:14	(current)
4/05/04	A	7:00-20:00	GenevieveB	28/04/04 15:37:14	(current)
3/05/04	A	7:00-20:00	GenevieveB	28/04/04 15:37:14	(current)
2/05/04	A	7:00-20:00	GenevieveB	28/04/04 15:37:14	(current)
1.05/04	A	7:00-20:00	GenevieveB	28/04/04 15:37:14	(current)
30/04/04	A	7:00-20:00	GenevieveB	28/04/04 15:37:14	(current)
29/04/04	A	7:00-20:00	GenevieveB	28/04/04 15:37:14	(current)
280404	A	7:00-20:00	GenevieveB	280404 15:37:14	(current)
25/04/04	A	7:00-20:00	lisab	19/04/04 10:26:23	(current)
24/04/04	A	7:00-20:00	lisab	19/04/04 10:26:23	(current)
23/04/04	A	7:00-19:30	lisab	19/04/04 10:26:23	(current)
22/04/04	т	7-00-20-00	Kim S	13/04/04 09:21:59	(averwitten,
22/04/04	A	7:00-20:00	lisab	1904/04 10:26:23	(current)
21/04/04	т	7-00-20-00	Kim S	13/04/04 09:21:59	(avenvillen,
21/04/04	A	7:00-20:00	lisab	1904/04 10:26:23	(current)
2004/04	т	7-00-20-00	Kim S	13/04/04 09:21:59	(averwitten,
20/04/04	A	7:00-20:00	lisab	1904/04 10:26:23	(current)
190404	r	7-00-20-00	Kim S	13/04/04 09:21:59	(averwitten)
		7:00-20:00	lisab	190404 10:26:23	(current)

The report will tell you what date and time the Franchisee phoned to put down for work, what work requirements he asked for and who entered into FMS. If you have a Franchisee on WAG you can go into this area to make sure he is phoning in and putting themselves down for work.

# Billing

If you wish to view a statement of a Franchisee click on billing on the right hand side you will see a list of all statements that have been processed. Highlight the statement and click view.

Billing and fees		
- Current Fee Structures	Insurance	Old statements
Base Monthly Fee \$288.68	Company	View
%Once-Off Leads	Charge Frequency	1/04/04-30/04/04
Fee per Expected Regular	Annual Premium	1/03/04-31/03/04 1/02/04-29/02/04
Opening Expected Regulars	Renewal Amount	
Proportion Franchise Fee 100.00%	Month of Renewal	
Proportion Advertising Fee	Other fees Advertising Fee \$69.08	
Minimum Franchise Fee	Minimum Adv Fee	
- Old Fee Structures	Marketing Levy \$34.02	
Franchise Fee %Cut	Administration Levy	
Advertising Fee %Cut	Pager Service Fee	
Opening Leads	TV Levy	
Surplus Group Number	Installment Payment	

Franchisee:	<b>ise Bil</b> 1657 PC Mr PAUL	19 Pau	l John Co		rom: 1/04 n	704 10.	30/04/04	
Summary								
Franchise Fee	Advertising	Admin	Marketing	т	Pager	Surp Fee	Adv-Surp Fee	GST
\$328.79	\$69.08	\$0.00	\$34.02	\$0.00	\$0.00	\$0.00	\$0.00	\$43.19
Regulars	Reg Val	Surplus	Open \$	Gurplus	Start E/R	Leads	Trans In	Exp Regs
9	\$180.00	0	0		0	51	0	15
Leads								
Client	Address			P	ione	Service	Date	Exp Regs
Peter Goldring	17 BAXTER AV	, CHELSEA 3196	/IC	97	29661	MOW RUBBISH	05/04/04	0
en roberts	2/29 ARGYLE /	AV, CHELSEA 319	3 VIC	04	9113119	MOW GARDENIN	iG 05/04/04	0
patricia davies	13 ANDERSON	ST, CAULFIELD	SOUTH 3162 VIC	953	283484	MOW ONCE	05/04/04	0.25
	9 DOROTHEA	ST, HIGHETT 3190	VIC	04	2256284	MOW ONCE	07/04/04	0.25
TOVY	70 PATTERSO	N ST, BONBEACH	3196 VIC	04	2405069	MOW REGULAR	08/04/04	1
юу	AGE TELEVISION	PDE, BEAUMARI	S 3193 VIC	04	19371100	MOW REGULAR	22/04/04	1
	TOD TRAMWAY						0 29/04/04	

#### Miscellaneous

When your franchisee decides to reduce his all and local areas, and you have taken the suburbs out of his areas, if your franchisee elects not to service his previous clients in the suburbs he no longer goes to, then take the tick off get previous clients outside normal area, click Save. Your franchisee will no longer get any of his previous clients from the suburbs that you have removed form his areas.

🖥 Franchisee ot	her details		
_ Miscellaneous de	tails		
Company?	🔲 Company name	SMITH	ENTERPRISES PTY LTI
ACN:	101 269 269		
ABN:			
Training date:	<b>—</b> -	~	
Trainers:	GP		
Newspapers:	LEADER		
Special skills:			
Territory details—			Allocation
Previous owner		-	<ul> <li>FSE will call client within 2 hours</li> </ul>
Source:	New	-	⊖ FSE will quote client
Clients purchas		=	<sup>™</sup> at given time
Purchase price:	\$16,000.00		Get previous clients outside normal areas?
Registration num	bers		
Vehicle: SFL12	23	Trailer:	DGH 876
	Save		Cancel

#### **Past Messages**

To look at a Franchisees past messages FMS records all messages that have been sent whether for a job or Chat message (message to a Franchisee e.g. meeting tonight 8pm). Click on Past Messages.

This screen allows the viewer to track changes to a specific job and view the previous messages regarding that job. There is a record of the code of all Franchisees that have serviced that property, the dates when paged, what time and which Admin Centre operator dealt with the enquiry, a copy of the page and details of the accompanying message sent.

Messages for PC19 Criteria Sent from 228/06/200 Timezones: Show loca		7	09/2004	▼ What to	o show		Reload	_	
Messages									
То	When		Ву	Status	Mess	age			
PC19-Xacom-0433206 273.p+Paul1018	28/09/04 :	9:49	Angela B	Sent				ENTLEIGH EAST 3165(77 J5) 3:48 (ANGELAB) PLS PH CL	
PC19-Xacom-0433206 273.p+Paul1018	27/09/04	18:23	jeanett ef	Sent				FLEIGH EAST 3165(78 A5) IETTEF) PLS PH 2 ARR Q	
PC19-Xacom-0433206 273.p+Paul1018	27/09/04	16:03	SarahR	Sent		HANI MUSARSA,25 BUS :0409208419,MOW-ONCE		, CLARINDA 3169(78 3 (SARAHR) PLS PH CL 2 ARF	}
PC19-Xacom-0433206 273.p+Paul1018	27/09/04	15:38	GregP	Sent	PSE	T: APPOLIGIES IF YOU H. CHECK YOUR UNIFORM SE VIA EMAIL ASAP FOI	SIZES, IF S		
PC19-Xacom-0433206 273.p+Paul1018	27/09/04	15:37	GregP	Sent		T: THIS WEEKS FRANCH M GREG	ISEE MEET	ING HAS BEEN CANCELLED.	
PC19-Xacom-0433206 273.p+Paul1018	27/09/04	13:46	SarahR	Sent	9773			EN AV, CHELSEA 3196(97 C3) AHR) PLS PH CL 2 ARR Q +	)
PC19-Xacom-0433206 273.p+Paul1018	23/09/04	13:58	Emilyl	Sent	A10)	T: DAVID DIXON,338 NEF M:0418336064,MOW-ON0 557994		, CHELSEA 3196(93 58 (EMILYL) CALL JAN ON	
PC19-Xacom-0433206 273.p+Paul1018	21/09/04	15:44	Angela B	Sent	A12)	Z0EY,3/16 F0Y AV, CHE 3:95802388,M:040088969		(93 ICE,2179 15:44 (ANGELAB) PL:	s
Copy (Ctrl+C)			Repa	ige (F4)		Job details (F6)		Close (Esc)	

### Notes

This is a very important part of the system for you and your Franchisee; you should be recording all information under notes. This is also where you enter your business reviews with your franchisee.

Click on notes, click add notes, in the Type box select if general or business review etc. type in your notes and press close.

If you need to review what you have written, you need to go back into notes and highlight the note you require.

🖥 Notes			
Added by/when	Туре	Text	<b>•</b>
GregP 31/08/2004 5:47:27	General	26.07.04 Paul rang inquiring about getting	some transfers for sandwich boards. He and B
GregP 30/08/2004 9:01:30	General	07.06.04 Paul rang re pulling out of Hortics	ultural course to quote. Learning little. Not org
GregP 30/08/2004 8:44:15	General	29.04.04 Paul rang re Horticultural Course.	. Looking at doing. Gave details. Phil Brookes 🚽
GregP 30/08/2004 8:30:11	General	15.03.04 Rang Paul. Follow up call, how i	is it going. Reply work up and down a bit. Spo
GregP 30/08/2004 8:30:11	General	29.03.04 Paul rang. Business booming. H	las 113 clients, lots of work but no money coming
GregP 19/06/2004 10:10:2	General	31/1/4 Rang 3.00pm doing emergency wo	rk. Having trouble locating tip. I directed Carroll R 🗨
, ⊢Note details			
Type: General 💌	Priority:	Date: 30/08/2004 0	
of getting used to working for be \$60,000 - \$70,000. I stres	yourself. Paul mentioned reali sed that bottom line was how		
Add note		Print note	Close

# Complaints

"Complaints" section keeps a record of your Franchisees complaints records and also allows the Franchisor to add notes next to complaints. Click on Complaints to enter a note against the complaint, highlight the complaint, click *here to enter a new note* and type in your notes, press close.

Complaints	for PC19				
Complaints:					
16/08/200	4 4:48:11 PM	COMPLAINT:MRS H	AZLEDINE, 2 IMMER	SET DR, CHELSE	A HEIGHTS
21/02/200	4 1:26:35 PM	COMPLAINT: IAN JAN	NSSEN A/19 BYRON	NIST, ELWOOD(67	B 2) 950462
Nietes serie	t the second inte				
Notes again:	st the complaint:	4 F 1 1			
		(click here	e to enter a new note	J	
		Clo	ose		
liscellaneous	Past messages	Notes	Complaints	Save	Cancel

### SUSPENSION OF A FRANCHISEE

If a franchisee needs to be suspended in the Status section click on the arrow select suspended, the status will turn red. Click on notes, type in your notes.

Franchise details-			Contact details		
Franchisee code	× AC14		Manager:	Mr ALLAN CLA	ARKE 🔽
Franchise name:	JIM'S MOWING	(SANDRINGHAM	Mobile:	0411123456	
Franchisor:	JIM'S MOWING	(SOUTH BAY 🔻	Phone:	97211245	
Status:	Suspended	•	Fax:	97211246	
Contract signed:	03/05/2004	-	Owner 1	<none></none>	•
Started:	05/05/2004	=	Owner 2:	<none></none>	•
Finished:		-	Spouse:	<none></none>	•
WAG:		_	Send stuff to:	Mr ALLAN CLA	ARKE 🔽
WAG: WAG value:	Yes		Paging company	OptusMobile	•
WAG Value:	\$880.00		Paging number:	0411123456	
- Stats Gross regular retur	m: Surplu	us: Lead	s: Regular	s: Trans	ifer
Address	People	Services	Work needed	Areas	Billing
Miscellaneous	Past messages	Notes	Complaints	OK	Cancel

Once you have suspended the franchisee whichever screen you go into you will notice that there is an (z) at the end of his franchisee code.

Find franchisees	s - 1 found					_ D ×
I'm looking for: 💿	Current franchisees	O Finished franch	isees 🛛 🔿 All francl	hisees		
CODE: Fra	anchisor:	D	ivision:			
	M'S MOWING (SOUTH I					
First name:	Surname:	Mobile:		Search (	F3J	
				Class (F	21	
Service provided:	Territory:		Vehicle registration:	Clear (F	2)	
	•					
Code Name		Mobile	Franchise		Started	
BB11(z) BEN BEN	TLEY	0423778317	JIM'S MOWING (MEI	NTONE CENTRAL A)	9/02/2004	
Details	Work needed	Send chat	Past messages	Billing	Group page	FSO details

# **GROUP PAGES**

# **Individual Region**

- To send a group pagefind your Region under "Find a Franchisee"
- click on your region name in the drop screen,
- click "Search" a list of your Franchisee's will appear.

- FRANC	franchisees - 42 found CHISEES search criteria:			
I'm look	ing for: 💿 Current franchisees 🛛 🤇	Finished franc	hisees 🔿 All franchisees	
CODE:	Franchisor:	D	Division:	
BB11	JIM'S MOWING (SOUTH BAY	/SIDE) 💌		(50)
First na	me: Surname:	Mobile:	Search	n (F3)
First ha	me: Surname:			
· · ·		1	Clear	(F2)
Service	provided: Territory:		Vehicle registration:	
	<b>•</b>			
Code	Name	Mobile	Franchise	Started
BB11	BEN BENTLEY	0423778317	BEN SIMON BENTLEY	9/02/04
BD2	Mr BRADLEY WARREN DART	0409964298	JIM'S MOWING (MENTONE CENTRAL)	29/10/01
BH5	Mr BRETT ANTHONY HUNTER	0401989125	Jim's Mowing (MOORABBIN CENT'L)	2/10/00
BM20	Mr BRETT MCCLELLAND	0419332096	JIM'S MOWING (BENTLEIGH EAST B)	18/07/03
CC6	CHRIS JARRETT & CATHY HOUGH	0413747827	JIM'S MOWING (KEYSBOR'H WEST)	4/05/98
	Mr DES BUCKLEY	0403256576	JIM'S MOWING (CLAYTON SOUTH A)	10/09/01
DB18				
DB18 DG5	GRAHAM MCCONCHIE	0409864008	JIM'S MOWING (DINGLEY)	21/02/94
DB18 DG5 GC10	Mr GEOFF CLAYTON	0411571311	JIM'S MOWING (MENTONE WEST)	2/04/02
DB18 DG5 GC10 GD5	Mr GEOFF CLAYTON Mr GLENN IAN DOWNIE	0411571311 0412584236	JIM'S MOWING (MENTONÉ WEST) JIM'S MOWING (KEYSBOROUGH A)	2/04/02 29/10/01
DB18 DG5 GC10 GD5 GP5	Mr GEOFF CLAYTON Mr GLENN IAN DOWNIE GREG PUZZOLO	0411571311 0412584236 0418145382	JIM'S MOWING (MENTONE WEST) JIM'S MOWING (KEYSBOROUGH A) JIM'S MOWING (BEAUMARIS WEST)	2/04/02 29/10/01 12/01/98
DB18 DG5 GC10 GD5	Mr GEOFF CLAYTON Mr GLENN IAN DOWNIE	0411571311 0412584236	JIM'S MOWING (MENTONÉ WEST) JIM'S MOWING (KEYSBOROUGH A)	2/04/02 29/10/01

- Click group page
- type in your message on the left hand side
- if you do not want to send the message to certain franchisees then take the tick off against their code & press send.

🛐 Find fra	nchisees - 42 found					<u>_     ×</u>
FRANCHI	SEES search criteria:					
I'm looking	) for: 💿 Current franchis	ees 🔿 Finisl	hed franchisees	C All franchisees		
CODE:	Franchisor:		Division:			
BB11	JIM'S MOWING (S	OUTH BAYSIDE)	<b>▼</b>	•	Search (F3	3)
First na Si	end group message					
	To: Messa	ge:			70 char	acter left
	SB10 A Remir	nder Franchisee m	eeting tomorrow nig	ght 6.30 pm Clayton	Bowls Club. From (	Greg
	SH7					
0000	✓ SS10 ✓ TL4					<b>_</b>
BD2	🗹 TT4 🔄					
ono ,	🕶 AC14 🛛 🔽					
BM20		Send (F		Cancel (Esc)	1	
CC6 DB18		Jena (i	J	Cancer (ESC)	_	
	GRAHAM MCCONCHIE	0409	864008 JIM'S M	IOWING IDINGLEY	, , , , , , , , , , , , , , , , , , ,	21/02/94
GC10 N	r GEOFF CLAYTON	0411	571311 JIM'S M	IOWING (MENTON	E WEST)	2/04/02
GD5 N	r GLENN IAN DOWNIE	0412	584236 JIM'S M	IOWING (KEYSBOF	ROUGH A)	29/10/01
GP5 C	GREG PUZZOLO	0418	145382 JIM'S M	IOWING (BEAUMA	RIS WEST)	12/01/98
	dr GREG PUZZOLO	0418	145382 Jim's M	lowing (South Baysia	de)	12/01/98 🔽
4						
Details	s Work needed	Send chat	Past messages	Billing	Group page	FSO details

#### For Divisionals

To send message to all franchisees in yr Division

- select your Division
- click Search and then Group Page follow instructions above.

# FRANCHISE ENQUIRIES

To enter a franchise enquiry

select the "Franchisees" menu

- click "Enter a franchise enquiry" or select "Franchisee Enquiry." from the toolbar.
- Enter details into required fields
- Press Send Enquiry or F3 button
- Franchise enquiry will go to appropriate Franchisor of the Region.
- FMS confirms transmission via a copy of the page to a phone and e mail.

<table-of-contents> Enter a franchise enquiry</table-of-contents>	
<u>FR/</u>	NCHISE ENQUIRY ENTRY
Send enquiry to:	
Mr Greg Puzzolo	Other franchisors (F4)
Previous enquiries from address: —	
(none found)	Details (F5)
Franchise division:	Mowing
Suburb:	
	SANDRINGHAM 3191 VIC
Address:	36 MASEFIELD AV
Contact name:	JOHN KEMP
Phone #	98765432 Mobile #: Business #:
Stage reached:	Spoke on phone
Notes for the franchisor:	PLS PH CLI + SEND INFO KIT 30
What prompted them to call Jims?	Internet
Notes for the office:	
Send enquiry	! (F3) Clear (F2) Restore (F6)
DING ENOUIRIES	

#### FINDING ENQUIK To locate a Franchise Enquiry

- select the "Franchisees" menu
- click "Find a franchise enquiry" Enter your Region under Franchisor •
- .
- click Search

FRANCHISE ENQUI					
Division:	Franchisor:		a	1	
	,	/ING (SOUTH BAYSIDE)		Search	n (F3)
Unit #: Street #:	Street:	Suburb:	State:	Clear	(F2)
First name: S	Surname: Pl	none #:	Enquiries sine 5 /02/04		
Name	Phone	Franchisor		Enquiry date	Stagi 🔺
SHANE HANCOCK	0401509530	JIM'S MOWING (SOUTH BA	AYSIDE)	5/02/04 13:56:	Spok
STEVE HOUDALAKI	95510023	JIM'S MOWING (SOUTH B/	AYSIDE)	11/02/04 13:25	Spok
STUART NAGLE	0408408673	JIM'S MOWING (SOUTH B/	AYSIDE)	12/02/04 10:36	Spok
steve tsiantoulas	95581253	JIM'S MOWING (SOUTH B/	AYSIDE)	17/02/04	Spok
craig viles	85022844	JIM'S MOWING (SOUTH B/	AYSIDE)	24/02/04	Info :
chris pinirou	0422799027	JIM'S MOWING (SOUTH B/	AYSIDE)	25/02/04	Spok
mrs gilbert	95881910	JIM'S MOWING (SOUTH B/	AYSIDE)	9/03/04	Spok
Glen Gleeson	0425711416	JIM'S MOWING (SOUTH B/	AYSIDE)	16/03/04	Spok
rick liti	0414603394	JIM'S MOWING (SOUTH B/	AYSIDE)	16/03/04	Spok 💌
•					
Enquiry details	s (F4)	Send message to FSO (F6)	Pa	st messages (F	7)

In addition, FMS allows you to search for a franchise enquiry by any combination of division, franchisor, and address of person inquiring, name of the person inquiring or the phone number.

#### **Tracking enquiry progress**

To view details

- highlight the enquiry,
- click "Enquiry Details".

Enquiry sent to: M'S MOV	VING (SOUTH BAYS	DE)   Date enquired:	21/04/04	-
Stages reached			, toma	_
Stage	Reache	c Date reached		
Spoke on phone	<b>v</b>	21/04/04		
Info sent				
Interview				
Trialing results				
Given contract				
Signed				
Terminated				
Notes	fenter	new note)		
	(enter	new note)		

You can monitor all your enquiries from the first phone call to end of franchise and at any time you can add notes in.

If you want to add notes against interview:

- click box next to interview
- click on enter note
- type in notes
- click save.

### BILLING

# **Generating billing runs – End of Month**

To generate a billing run at the end of the month, select the "Billing" menu and click "Generate Billing Runs".

📑 Generate EOM runs			×
Generate new run from: 10/05/04 💌 to 31/0	05/04		
Select franchisors to process			
Franchisor	Billing done until	Run?	
BEACHHOUSE			
JIM'S ANTENNAS (NORTH WEST VICTORIA)	30/04/04		
JIM'S ANTENNAS (SOUTH EAST VICTORIA)	30/04/04		
JIM'S ANTI-SHOCK(NORTH EAST VICTORIA)	30/04/04		
JIM'S APPLIANCE REPAIRS (NW REGION)	30/04/04		
JIM'S BALLOONS (VICTORIA)			
JIM'S BBQ (CENTRAL MELBOURNE)	30/04/04		
JIM'S BLINDS REPAIRS (VICTORIA)	30/04/04		-
Export fees file to: C:\Program Files\Jims\FMS4\	nt options: Print statements now? Print EOM summary? Print EOM billing charges? Print EOM billing data?		
Generate billing runs	Close		

In the case of a Franchisor that manages several regions, FMS4 offers the option to generate runs all at once, by ticking multiple franchisors.

Please note you will only see your own regions name appear in the box above. To generate a billing run, select the date range; tick the box next to your regions name. At this point you have the option to print statements now or print any of the other reports listed. If you do not wish to do this now then make sure there are no ticks in the boxes under *Export fees file to* if you are using MYOB, Quick Books etc. Enter here where you want your files to export to. Click "Generate billing runs".

i Generate EOM runs			×
Generate new run from: 1 /10/2004 💌 to 31/	10/2004 💌		
- Select franchisors to process			
Franchisor	Billing done until	Run?	
JIM'S MOWING (NORTHERN GEELONG)	30/09/2004		
JIM'S MOWING (NORTHERN REGION WA)	30/09/2004		
JIM'S MOWING (OUTER STH WEST (east) REG	30/09/2004		
JIM'S MOWING (OUTER WESTERN REGION)	30/09/2004		
JIM'S MOWING (PENINSULA REGION)	30/09/2004		
JIM'S MOWING (SOUTH BAYSIDE)	30/09/2004		
JIM'S MOWING (SOUTH EAST WA)	30/09/2004		
JIM'S MOWING (SOUTH EASTERN MELB)	30/09/2004		-
Export fees file to:	nt options: Print statements now?		
	Print EOM summary? Print EOM billing charges?		
	Print EOM billing data?		
Generate billing runs	Close		

FMS4 will then proceed to create the billing statements for the appropriate franchisees.

Generating billing run for:
JIM'S MOWING (SOUTH BAYSIDE)
BH5 (3 of 41)
Saving statement to database!
Close

### **Printing billing runs**

To print a billing run after it has been generated, select the "Billing" menu and click "Print billing run"

Print billing Criteria: — Franchis		DWING (SOL	JTH BAYSIDE	•
Billing per	iod			
1/03/04 1/02/04 1/01/04	- 30/04/04 - 31/03/04 - 29/02/04 - 31/01/04 - 31/12/03			
-What to s	how			
Summary Regular o Leads Transfers	clients 🔽	From: To: All?	1 /04/04 30/04/04	•
	ОК		Cancel	

Enter the franchisor details and highlight the billing period required, and any other options desired, then click "OK".

Alternatively, to print a single statement, locate the franchisee in "Find Franchisees" then select "Billing" and follow the same procedure.

# **Deleting billing runs**

From time to time it maybe desirable to generate a billing run for testing purposes. Alternatively a billing run may be generated incorrectly. To delete select the "Billing" menu and click "Delete billing run"

Select billing run to DELETE:
Criteria:
Franchisor: JIM'S MOWING (SOUTH BAYSIDE)
Billing period
1/04/04 - 30/04/04
1/03/04 - 31/03/04 1/02/04 - 29/02/04
1/01/04 - 31/01/04
1/12/03 - 31/12/03
OK Cancel

Select the Franchisor and billing period to be deleted, and then click "OK".