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NEW FUNCTIONS IN FMS4 ..... ERROR! BOOKMARK NOT DEFINED.

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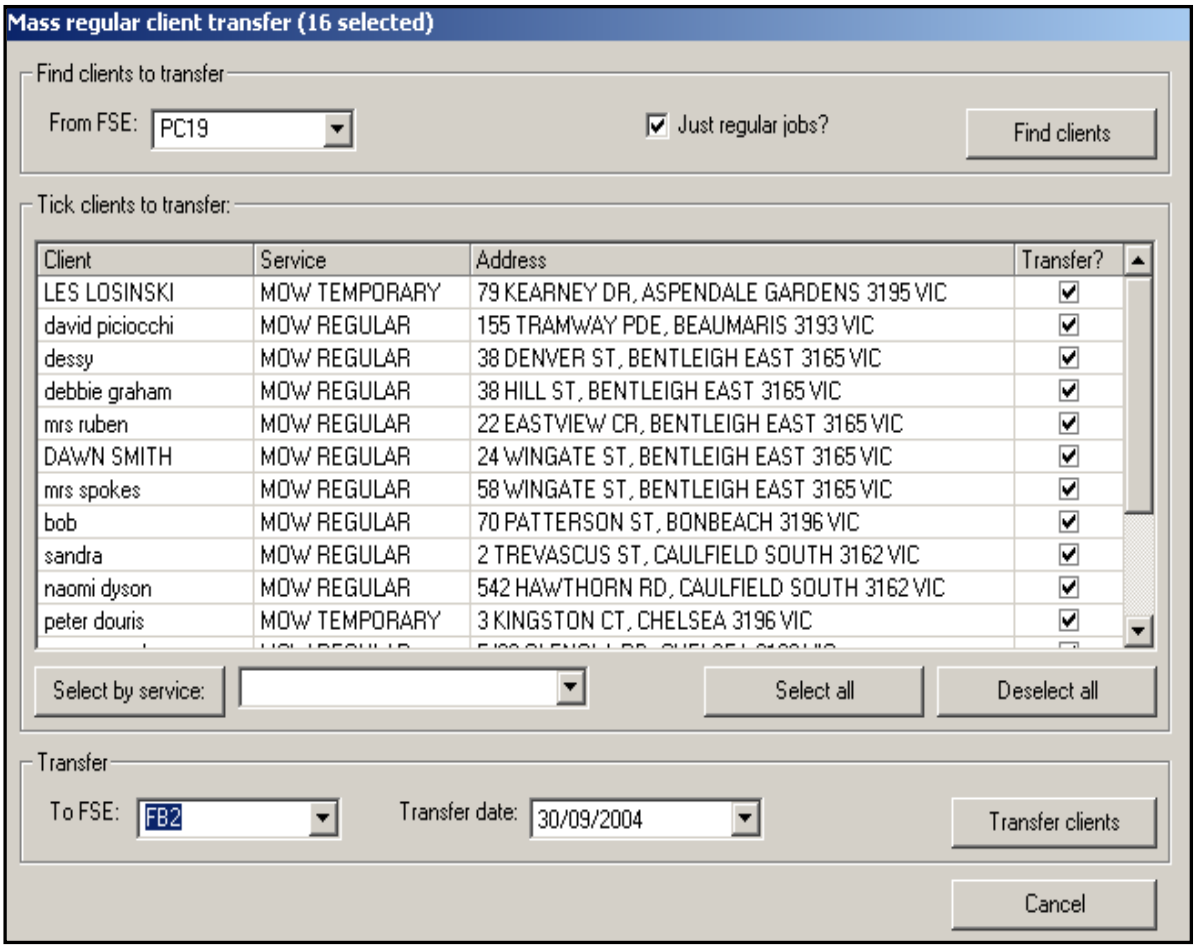
FUNCTIONS

Mass Client Transfer

When you do a resale and want to transfer the clients to the new franchisee click on *Functions*, select *Mass Client Transfer*, enter the *Code of the Franchisee*, who is selling, if you do not want just regulars – then take tick off. Click on *Find Clients.*

A *List of Clients* will appear, check to see if these are correct, if ok then click select all, or you can just tick the one's you want. Then under transfer enter the *New Franchisee Code* and click on *Transfer Clients*, a box will appear with *Finished*. Click *OK.*



REPORTS

The following lists of reports are currently available. All these reports are available to PRINT and SAVE AS:

Type of Report	*Instructions*	*Report Information*
FRANCHISEE/FRANCHISOR		
Franchisee Details	*- Click on Reports* *- Select Franchisee* *- Select Franchisee, then Details* *- Enter details of yr division, region & select short or detailed option* *- Press Ok to generate report*	*- Name* *- Address* *- Start Dates* *- After hours phone number* *- Mobile phone number*
Franchisee Disclosure Document	*- Click on Reports* *- Select Franchisee* *- Select Division, then Region* *- Press Ok to generate report*	*- Franchisee* *- Manager* *- Mobile phone number* *- Total amount of Franchisees* *- Date report was generated*
Franchisee areas covered	*- Click on Reports* *- Select Franchisee* *- Enter Franchisee code* *- Tick or un-tick areas* *- You can view or print* *- Press Ok to generate report*	*- list of services of franchisee* *- list of areas of franchisees*
Work Availability Guarantee	*- Click on Reports* *- Select Franchisee* *- Enter Division, franchisor, f'see* *- Press Ok to generate report*	*- Franchisee* *- Manager* *- Start date, income guarantee value* *- WAG Value* *- Amount of regular clients* *- $ value of the Regular clients*
Franchisee Territory Review	*- Click on Reports* *- Select Franchisee* *- Enter Franchisee Code* *- Press Ok to generate report*	*-Date the job was paged to F'chisee* *-Address of job* *-Service* *-code of Franchisee* *-work requirements they were on when job was paged* *- date & time of job booked* *- cancellation date of job*
Work Requirements	*- Click on reports* *- Select Franchisee* *- Enter your Division* *- enter Franchisor, f'see code* *- Enter the date range FROM-TO*	*-report gives the day, date & work requirement code* *- working hours the f'chisee had selected* *- every change to the work requirements*

Business Reviews	*- Click on reports* *- Select Franchisee* *- enter your Franchisor* *- Enter the date range FROM-TO*	*- month by month review on yr region*
Post Code Priority	*- Click on reports* *- Select Franchisee* *- Enter your Division or* *- Franchisor, f'see code*	*-Franchisee code with number of assigned postcodes to f'see* *-postcodes in brackets next to f'see indicate the assigned postcodes*
Suburb Coverage	*- Click on reports* *- Select Franchisee* *- Enter suburb & service code* *- Click ok*	*- Franchisee name & code* *- Leads received*
Special Skills	*- Click on Reports* *- Select Franchisee* *- Enter either Division, Franchisor or Franchisee*	*-Code, Fse name, Territory, Mobile and the list of skills*
Prospective Franchisees	*- Click on reports* *- Select Franchisee* *- Enter your Division, Franchisor* *- Enter the date range FROM-TO* *- Enter option to get summary or list* *- Click ok*	*- Client's name, address* *- Enquiry date, phone number/mobile* *- Stage of enquiry reached* *- total number of prospects*
New Franchisees	*- Click on reports* *- Select Franchisee* *- Enter your Division, Franchisor* *- Enter the date range FROM-TO* *- Enter option to get short or detailed summary*	*-New Franchisee name, address* *-Franchisee code* *-Start date, land line/mobile number* *-Total number of new f'chisees for assigned period*
Finished Franchisees	*- Click on reports* *- Select Franchisee* *- Enter your Division, Franchisor* *- Enter the date range FROM-TO* *- Click ok*	*-Finished Franchisee name, address* *-Finish date, land line/mobile number* *-Total number of finished f'chisees for assigned period*
Franchisee Longevity	*-Click on reports* *- Select Franchisee* *- Enter your Division, Franchisor* *- Enter the Period* *- Enter the date range FROM-TO* *- Click ok*	*-Division's survival rate for assigned period* *-number of new f'chisees who have signed up & survived*
Franchisor List	*- Click on reports* *- Select Franchisees*	*- franchisor contact details - region wise or divison based*
Franchisor Growth	*- Click on reports* *- Select Franchisee* *- Enter your Division, Franchisor* *- Enter the date range FROM-TO* *- Click ok*	*-number of franchisees during the assigned period* *- joining/completion date* *- percentage of growth for that period*

Leads Report	*- Click on reports* *- Select leads OR* *- Enter your Division* *- Enter yr F'chisor/F'see/ Suburb/service* *- Enter the date range FROM-TO* *- Select your Options*	*- Number of f'chisee leads based on address of the job/date/service/client's name & ph no* *- Total number of leads for the assigned period*
Source of Leads	*- Click on reports* *- Select Leads* *- Enter your Division* *- Enter yr F'chisor/F'see/Suburb* *- Enter the date range FROM-TO*	*-Source of Leads* *-% figure to determine if Advertising is working in the f'chisee area*
Franchisee Customers	*- click on reports* *- Click on leads* *- Enter your Division OR* *- Enter yr F'chisor/F'see* *- Enter option for a list or summary* *- click ok*	*-Total amount of jobs f'chisee has recd itemized by suburb* *- $ amount for the total jobs*
Cancelled Leads	*- Click on Reports* *- Click on leads* *- Enter your Division OR* *- Enter yr F'chisor/F'see* *- Enter option for a list or summary* *- click ok*	*-Total no. of cancelled leads for f'chisee* *-Details of leads includes name/address/service/dte booked/cancellation date of job*
Unserviced Jobs	*- Click on Reports* *- Click on leads* *- Enter your Division OR* *- Enter yr F'chisor/F'see/Suburb* *- Enter the date range FROM-TO* *- Enter option for a list or summary* *- click ok*	*-details of unserviced jobs in yr division* *-demand for f'chisees in certain areas based on no. of unserviced jobs*
Client Comments	*- Click on Reports* *- Click on Leads* *- Enter your Division OR* *- Enter yr F'chisor/F'see/Suburb* *- Enter the date range FROM-TO* *- click ok*	*-Clients names & addresses used by F'chisee* *-All pager comments paged out to f'see relating to leads*
BILLING		
EOM Summary	*- click on reports* *- Click on Billing* *- Enter your Franchisor* *- Highlight the billing run from drop screen* *- Click ok*	*- new jobs for the month/no. of f'chisees* *- total no. of f'chisee fees/total advt fees* *- marketing & admin levy* *- details of new f'chisee for that month*
EOM Billing Charges	*- click on Reports* *- Click on Billing* *- Enter your Franchisor* *- Highlight the billing run from drop screen* *- Click ok*	*- Details of f'chisee in yr region* *- Details on all f'chisee fees/advt/surplus/mktg/insurance/tv/ pager & trailer.* *- Total amount in figures*

EOM Billing Data	*- Click on Reports* *- Click on Billing* *- Enter your Franchisor* *- Highlight the billing run from drop screen* *- Click ok*	*- Details of f'chisee on individual basis* *- expected regular leads, leads, transfers & total expected regulars* *- total for each column*
OTHER		
Call Statistics	*- Click on Reports* *- Click on Other* *- Enter the date range* *- click ok*	*- Gives different users of FMS in the Call Centres/F'sors* *- Figures on the user name* *- Amount of regular jobs paged/once-offs/chat pages* *- total f'chisee actions for the date range specified*
Messages Sent	*- Click on reports* *- Click on Other* *- Enter your Division* *- Enter the date range FROM-TO* *- click ok*	*- Date & time message sent for the assigned period*
Complaints	*- Click on reports* *-Click on Other OR* *-Enter your Division* *- Enter your F'chisor* *- Enter the f'chisee you want To view complaints of*	*-Specific complaint details of the nominated f'chisee* *- Date & time included* *- total figure of complaints for that f'chisee*
Appraisals	*- Click on reports* *- Click on Other OR* *- Enter your Division* *- Enter your F'chisor* *- Enter the f'chisee you want To view appraisals of*	*- Name of Fse & date sent* *- Details of message*
Streets	*- click on Reports* *- Enter Option by Territory or by Suburbs* *- Click ok*	*-territory option will indicate a list of all streets with melway ref & suburbs in f'chisee territory* *-suburb option will indicate list of all streets in the suburb with melway ref* *- total number of streets in that suburb*

FMS4 SUPPORT

InfoTech Department:
The FMS4 interface was developed primarily by InfoTech at the National Office. InfoTech currently provides support and development of FMS4 and may be contacted during working hours on 03 9780 9998 or email infotech@jims.net for non-urgent matters.

Manual Documentation
Development of "FMS 4 Manual A guide for Franchisors" advice, training, up-dating of operating manual, support to Franchisors & Administration Centre's with FMS 4 concerns non-IT related, please contact the Documents Team at documents@jims.net or by phone on (03) 9780 9998.