

SPRINGBOARD TO SUCCESS:

MANAGING MULTI-UNIT SALES



STEPS FOR MAKING MULTIPLE UNITS TO BE OPENED

IF you have one agreement that pertains to all locations...

Make a REGION to contain the information that goes across locations

Make Units

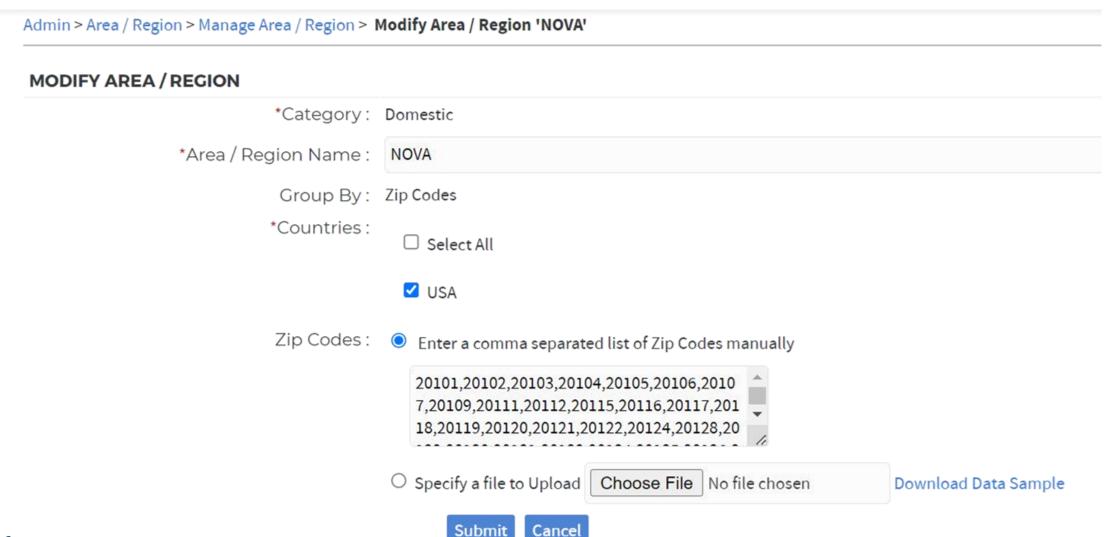
Make first unit as an active unit
Copy it to make all the desired future units
Change the first unit to "In Development"
Change the remaining units in bulk to another status

Change the Status of the Sales Lead to "Closed – Sold"

Fill in sold date and number of units
This populates lead conversion reports



MAKING A MULTI-UNIT REPORTING REGION





ADDITIONAL LIFECYCLE STATUS DISPLAY

Fill out the expected opening dates for all known future locations to see a view of what's due when

ALL 686		SOLD PENDING OPENING 5		IN DEVELOPMENT 32		ACTIVE 576	TERMINATED 68		ARCHIVED 5	
	FRANCHISE ID	ТҮРЕ	OWNER	ENTITY NAME	LICENSE TYPE	CITY	STATE / PROVINCE	EXPECTED OPENING DATE	PHONE	ACTION
	SMITH 4 of 4 A (TBD)	Franchise	Aaron Knight +1		Transferred License	TBD	Florida	Oct 31, 2027	111	•••
	SMITH 3 of 4 (TBD)	Franchise	Ted Smith			TBD	Florida	Oct 31, 2026	111	•••
	SMITH 2 of 4 (TBD)	Franchise	Ted Smith	ACME Partners		TBD	Florida	Oct 31, 2025	111	•••
	3 of 3 (tbc)	Franchise	Bob Jones					Oct 31, 2024		•••
	Jones 2 of 3 (TBD1)	Franchise	Bob Jones					Oct 31, 2024		•••
4										+
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