



SPRINGBOARD TO SUCCESS:

MANAGING MULTI-UNIT SALES



Your Instructor:
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Training Manager



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

Admin > Area / Region > Manage Area / Region > Modify Area / Region 'NOVA'

MODIFY AREA / REGION

*Category : Domestic

*Area / Region Name : NOVA

Group By : Zip Codes

*Countries :

☐ Select All

☒ USA

Zip Codes : ☒ Enter a comma separated list of Zip Codes manually

20101,20102,20103,20104,20105,20106,20107,20109,20111,20112,20115,20116,20117,20118,20119,20120,20121,20122,20124,20128,20

☐ Specify a file to Upload

Choose File

No file chosen

[Download Data Sample](#)

Submit

Cancel

ADDITIONAL LIFECYCLE STATUS DISPLAY

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

ALL686

SOLD PENDING OPENING5

IN DEVELOPMENT32

ACTIVE576

TERMINATED68

ARCHIVED5

<input type="checkbox"/>	FRANCHISE ID	TYPE	OWNER	ENTITY NAME	LICENSE TYPE	CITY	STATE / PROVINCE	EXPECTED OPENING DATE	PHONE	ACTION
<input type="checkbox"/>	SMITH 4 of 4 A (TBD)	Franchise	Aaron Knight +1		Transferred License	TBD	Florida	Oct 31, 2027	111	...
<input type="checkbox"/>	SMITH 3 of 4 (TBD)	Franchise	Ted Smith			TBD	Florida	Oct 31, 2026	111	...
<input type="checkbox"/>	SMITH 2 of 4 (TBD)	Franchise	Ted Smith	ACME Partners		TBD	Florida	Oct 31, 2025	111	...
<input type="checkbox"/>	3 of 3 (tbc)	Franchise	Bob Jones					Oct 31, 2024		...
<input type="checkbox"/>	Jones 2 of 3 (TBD1)	Franchise	Bob Jones					Oct 31, 2024		...

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