

New Unfranchise Owner Training Tracker

Name _____ Sponsor _____ Senior Business Partner _____
 Unfranchise Owner ID _____ Phone # _____ Phone # _____
 Email Address _____ Q-Date _____ Email Address _____
 Rep ID# _____ Password _____ Placement _____ Ext _____ L/R _____
 Preferred Customer # _____ Password _____ **UF AutoShip Start Date & Next 3 Pull Dates:**
 Phone _____ **Report BV completed:** Yes/No 1. _____ 2. _____ 3. _____
 Registration BV 001 200 **BV** 002 _____ 003 _____ Common Side: _____

AT REGISTRATION

- Unfranchise Registration Completed & **Ticket Purchased** to Next Event _____ : W/C or IC: _____
- Subscribe to UFMS during Unfranchise Registration
- Submit Product Order or Fast Start Kit
- Set Up Unfranchise AutoShip* Form (check insured Unfranchise AutoShip buyer) Do Home Shopping List Code 671: order it
 - o 50 BV / 10 IBV
 - o 100 BV (after first check) / 20 IBV (after first IBV check)
 - o 150 BV (after first check for reaching 5000/5000 BV) / 30 IBV (after first check for reaching 5000/5000 IBV)
- Order UFMS on Unfranchise AutoShip
- Submit Form 1001 via Unfranchise Registration Wizard
- Submit Form 925 via Unfranchise Registration Wizard

* UFMS & Unfranchise AutoShip initiates the accrual option for BV & IBV Enables your Sponsor to place BV & IBV in your BDCs for your benefit

POST SIGN UP

- Log on to unfranchise.com using Rep ID and temporary password [change password] (**at Registration**)
- Agree to Auto Renewal Option (pulls the 1st day of the start date month) (**at Registration** under My Account in their Unfranchise)
- Designate Incentive Business Development Center (IBDC) (**at Registration**)
- Set BV and IBV auto placement options (**at Registration** when setting up Shop.com)
- Set up Web Portal _____ * All four of these have the same name in the blank
 - And Mini Websites www.global.shop.com/ _____
 - www.isotonix.marketamerica.com/ _____
 - www.motivescosmetics.com/ _____
- Schedule Required Trainings (At Follow up appt.) and 3 Events: Wellness 101/Beauty Basics and All about Skin
 - o New Unfranchise Owner Training (NUOT) _____
 - o Basic 5 (B5) _____
 - o Executive Coordinator Certification Training (ECCT) _____
- Learn to register preferred customers (**Welcome Guide**)
- Learn to create a Sales Receipt Entry (**Welcome Guide**)
- Do the **Shopping Annuity Assessment** process: www.ShoppingAnnuity.com : Home Shopping List Survey Code #671 Go to REPORTS > **SAMM**> Place Participating Senior partners ID number & SAVE: Explain this report & how to monitor
- Learn online forms – (**Form 1000, Unfranchise AutoShip**) (**Welcome Guide**)
- Set up **90 day Action Plan** for Events: 10 Customers – 2 Partners – **DO NOT SKIP THIS STEP** (review Names List)
 1ST Event: _____ (Date) 2nd Event _____ (Date) 3rd Event _____ (Date)

Week 1 set _____ done Y/N

IMPORTANT DATES AND ADMINISTRATIVE TASKS (Review at Follow up Appt. using the Getting Started Guide **within first 2 weeks!!!**)

- Submit Form 1000** (quarterly for your 001) **File within 60 days of Start of the Quarter**

Actual Deadline Purge Date	File on date below to AVOID Purge Report Status
o First Date: _____	_____
o Second Date: _____	_____
o Third Date: _____	_____
o Fourth Date: _____	_____
- Show Submit Form 1000 one time only on qualified 002, 003, etc... upon Qualifying each (Explain & schedule for NUOT training)
- Show Annual Renewal Form 1052 – (not applicable, if on Auto Renewal: Everyone should be on Auto Renewal)
 - o **Annual Renewal Date:** _____ (put in your calendar)
- Remember to:
 - o Keep credit card information in UFMS and Unfranchise AutoShip **up-to-date** – especially if you change cards
 - o Read Your Alerts in Back Office
 - o Get your TICKETS TO THE NEXT EVENT!

Week 2 set _____ done Y/N

USEFUL WEBSITES

- | | |
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| <ul style="list-style-type: none"> o www.unfranchisetraining.com o www.marketamericascience.com o www.unlimitedlifestyles.com o www.wellness101video.com | <p>Only applicable in USA:</p> <ul style="list-style-type: none"> o www.gonowresources.com o www.tlsslim.com o www.marketamerica.com/YourSite o www.shoppingannuitypaysyou.com |
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