

## STEP BY STEP FORM 1000 PROCEDURE

Your Sponsor/Mentor should walk you through this process the first time you do a Form 1000

**Your Form 1000 is DUE BY your Q-Date PRIOR to 2:00 PM**

**Do it as soon as you have \$200.00 in sales...DON'T Wait !**

- ❖ Logon to [www.unfranchise.com](http://www.unfranchise.com) through your Portal using your REP. ID/Email and password
  1. Go to the main screen and click on PREFERRED CUSTOMER
  2. click PROFILE
  3. A screen will come up where you will input customer info
    - a. (Fill out all customer info preceded by an asterisk\*) –
    - b. BV placement (choose either 002 or 003 of either yourself or one of your personally sponsored) in the future when you send customers to your portal, if they order...the BV / IBV created will be auto-placed ...in the center that you choose, and you can change it from 002 to 003 at anytime.
    - c. Click SUBMIT when you are finished; if you have more customer sales to record, (you'll need a minimum of \$200.00 in retail sales to complete your Form 1000) then CONTINUE to input the next customer repeating what you just did at the beginning of step 2.
  4. After submitting the customer(s), go to the left of the screen under Preferred customer, click SALES RECEIPT ENTRY:
    - a. click arrow next to box and scroll down to the customer you're entering the sales invoice for... *(you are simply creating a receipt...not making a purchase).*
    - b. enter products ordered (by the item #'s) by that customer and the quantity next to it, or use the category menu on the left to search for the item number.
    - c. click ADD TO CART (don't worry, this will NOT place another order, you are just recording it!)
    - d. when finished putting in item #'s, click VIEW CART/CHECKOUT at the top right
    - e. add Shipping/Handling and/or tax as needed and click RECALCULATE at the bottom of the page, then SUBMIT.
    - f. Optional - Print two (2) copies of the invoice/receipt. One is for your customer, as an invoice, one is for your records.
    - g. If you have other orders to enter, click CREATE ANOTHER RECEIPT and repeat the process with your next customer, if not, close the screen.
  5. Now, you should be back at the Unfranchise.com home page....go to left of screen again to ONLINE FORMS and click FORM 1000
    - a. Your customers orders will be listed along with the order totals. Check the "assign" boxes for your orders (**REMEMBER, AT LEAST 2 RECIEPTS WITH A GRAND TOTAL OF AT LEAST \$200 BEFORE SHIPPING AND TAX**)
    - b. **Select BDC(001)** from the dropdown menu
    - c. after making your selections, click SUBMIT
    - d. you'll see a form; scroll down to the bottom and click in box to **AGREE**
    - e. then click **SUBMIT AGREEMENT**
- ❖ **IMPORTANT - BE SURE TO PRINT THAT PAGE** (after submitting agreement) and keep for your records. You should see a message that says "THANK YOU FOR COMPLETING YOUR FORM 1000"

**To Verify:** Go back into your Form 1000 through the same process and verify that it says "**REQ MET**" for the current quarter