Opening another deal for an existing franchisee

Multi-unit buyers, resales and conversions: how to add a second or later deal without creating a second person.

A person can have any number of deals. An existing franchisee buying their next unit, a candidate who is now looking at a different territory, or an owner selling their tribe to a new operator all use **Open a deal** on the profile rather than a new candidate record.

Opening the deal

1. Open the franchisee's profile and click **Open a deal**.
2. Choose the **deal type**: single unit, multi-unit, area development, resale or conversion.
3. Enter the **territory of interest**, the **units planned**, an **expected signing date** if you have one, and the **owner** who will work it.
4. Click **Open deal**. It starts in your first pipeline stage and appears on the board and in the Deals card on the profile.

Deal types

Type	Use it for
Single unit	One tribe under one agreement — the common case.
Multi-unit	One buyer taking several units, usually with a schedule of openings.
Area development	Exclusive rights to open a number of units across an area over time.
Resale	An existing tribe changing hands to a new owner.
Conversion	An independent operator converting their existing business to your brand.

A FRANCHISEE BUYING AGAIN
When a signed franchisee opens a new deal their status stays Franchisee. Only a candidate with no other open deal is marked Lost if that deal falls through.