







# How to Create a Move-In Planner

## Description

Use the Move-In Planner to record a deposit, book a suite, facilitate the handoff between sales and operations, and most importantly, to coordinate a seamless transition for your residents. To create a Move-In Planner, there are three requirements: a deposit, an assigned suite and a specific move-in date.


The system will:

-  Create a Move-In Planner
-  Record a deposit
-  Reserve the suite
-  Change the **Prospect | Sales Stage** to *Deposit*
-  Change the **Prospect | Create Move-In Planner** to *Created*
-  Insert a history activity line on the prospect record

CHATTER TIP! → [Use Chatter Feeds to notify all appropriate team members of a new deposit.](#)

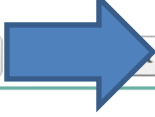
## Step by Step

- 1 Go to the prospect's profile and click **Create Move-In Planner**

Prospect  **Sawyers, John (John & Mary)**

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**Prospect Detail** Edit Delete Clone  Create Move-In Planner

▼ **General**

<b>Name</b>	Sawyers, John (John & Mary)	<b>Cor</b>
<b>Inquirer First Name</b>	John	<b>Initial Cont</b>
<b>Inquirer Last Name</b>	Sawyers	<b>Type o</b>

- Verify and correct the prospect and 2<sup>nd</sup> occupant information in the top two sections

▼ Prospect Information	▼ 2nd Occupant Information
Prospect's Prefix <input type="text" value="--None--"/>	Spouse's Prefix <input type="text" value="Mrs."/>
Prospect's First Name <input type="text" value="John"/>	Spouse's First Name <input type="text" value="Mary"/>
Prospect's Last Name <input type="text" value="Sawyers"/>	Spouse's Last Name <input type="text" value="Sawyers"/>
Prospect Prefers To Be Addressed As <input type="text"/>	Spouse Prefers To Be Addressed As <input type="text"/>
Prospect's Gender <input type="text" value="Male"/>	Spouse's Gender <input type="text" value="--None--"/>
Assisted Living <input type="checkbox"/>	Assisted Living <input type="checkbox"/>

- Click and select the **Stay Type**
- Specify the new **Suite** and click the magnifying glass to validate the information
- Specify the **Anticipated Move-In Date**
- Enter the **Deposit Amount**
- Click and select the **Payment Type** (Note: If your system is configured to create a Move-In Planner without a deposit, select *No Deposit* and leave the **Deposit Amount \$0**)
- Specify the **Deposit Date** (Note: Not required if *No Deposit*)
- Review your information, click **Create Move-In Planner** and select *Yes*
- Click **Save**

▼ Move-In & Deposit Details

Status	Initial Call
Stay Type	<input type="text" value="Permanent"/>
Community	iaRetirement - GTA
Preferred Suite	<input type="text" value="312"/> <input type="button" value="🔍"/>
Anticipated Move-In Date	<input type="text" value="2/28/2013"/> [ 3/10/2013 ]
Deposit Amount	<input type="text" value="500.00"/>
Payment Type	<input type="text" value="Cheque"/>
Deposit Date	<input type="text" value="2/14/2013"/> [ 3/10/2013 ]
Create Move-In Planner	<input type="text" value="Yes"/>