

How to Co-ordinate a Move-In Using the Move-In Planner

Description

The Move-In Planner is a powerful tool that can help co-ordinate the various stages of a Resident's move-in process. It is also helpful in capturing information that is not typically picked up in the sales cycle, such as social insurance and health card numbers.

Step by Step

Updating the Move-In Planner Page

- 1** Navigate to a Prospect's Move-In Planner page
- 2** Click **Edit**. Here you can enter information you have that was not entered during the creation of the Move-In Planner.
- 3** You may specify an **Assessment Date** and **Assessment Status**
- 4** If there is a **Move-In Incentive**, you may enter the incentive here, along with the **Start Date** and **End Date** for the incentive
- 5** Verify the Resident's information, which was picked up in the creation of the Move-In Planner, and make changes if necessary. This information will transfer to the Resident's profile page when the resident is created.
- 6** Enter the Primary Resident's personal information, such as **Resident Gender**, **Date of Birth**, and **Resident Health Card**. This information will transfer to the Resident's profile page when the resident is created.
- 7** If there is a Sharing Resident (or Second Occupant), verify their information and input any additional information you may have. This information will transfer to the Resident's profile page when the resident is created.
- 8** You may enter information about a **Primary Contact** for the Resident
- 9** Verify the **Community ID** and **Suite**. This information will transfer to the Resident's profile page when the resident is created.
- 10** Verify the **Expected Admission Date** and **Move-In Date**
- 11** You may specify a **Furniture Date** and related contact information
- 12** You may specify **Telephone** and **Cable** hookup dates
- 13** Verify the information under Accommodation and Personal Services. This information will transfer to the Resident's profile page when the resident is created.
- 14** Click **Save**

▼ General			
Audit No.	010386	Assessment Date	10/4/2013
Inquirer Name	Jacob Smythe	Assessment Status	Pending
Sty Type	Permanent		
Original Prospect	<u>Smythe, Jacob (Jacob Smythe)</u>	Refund Date	
Anticipated End of Stay		Refund Status	
Current Suite Status	Occupied	Move In Incentive	
		Move In Incentive End Date	
		Move In Incentive Start Date	
▼ Resident Information			
Resident Prefix		Resident Phone 1	(555) 555-5555
Resident First Name	Jacob	Resident Phone Source 1	Home Phone
Resident Last Name	Smythe	Resident Phone 2	
Resident Prefers To Be Addressed As	Jake	Resident Phone Source 2	
Resident Email			
▼ Resident Personal Information			
Resident Gender	Male	Resident Pst	
Resident Smoker	<input type="checkbox"/>	Resident Marital Status	Single
Resident Date of Birth	11/5/1930	Resident Health Card	66666-666-666 NN
Attended Living	<input type="checkbox"/>	Resident SSN	999 999 999
Resident Veteran	<input type="checkbox"/>		
▼ Primary Contact Information			
Contact First Name	Elle	Contact Phone 1	(555) 555-5556
Contact Last Name	Smythe	Contact Phone Source 1	Home Phone
Contact Prefers To Be Addressed As		Contact Phone 2	
Relationship To Resident	Daughter	Contact Phone Source 2	
Contact Email	<u>elle.smythe@gmail.com</u>		
▼ Community			
Community ID	<u>ia Retirement - GTA</u>		
Suite	<u>888</u>		
▼ Planning			
Expected Admission Date	10/1/2013	Furniture Date	10/1/2013
Resident Arrive		Furniture Contact	
Move-In Date	10/1/2013	Telephone Date	10/4/2013
Cable Date	10/5/2013	Telephone Contact	
Cable Contact			
▼ Accommodation & Personal Services			
Rent Type	<u>Permanent</u>	Program	
Rent	<u>\$2,200.00</u>	Service Type	<u>Service</u>
Monthly Due	<u>Month</u>	Service	<u>\$2,200.00</u>
Second Occupant Type		Lease Type	
Sharing Amount	<u>\$0.00</u>	Payment Method	

Managing Tasks

- 1** Hover over 'Open Activities' in the baby words and click **New Task**
- 2** Under **Assigned To**, specify the person to whom a task is assigned
- 3** Select an **Activity Type**
- 4** Enter a **Subject**
- 5** Specify a **Due Date** if the task is to be completed on a future date, such as planning a future call
- 6** If you have not yet started the task, leave the **Results** field as *None*
- 7** If you have not yet started the task, leave the **Status** as *Not Started*

- 8 Leave the **Completed Date** blank if the task has not yet been completed
Note: The Results, Status, and Completed Date fields will be changed when the task is marked as completed.
- 9 Click the box to set a **Reminder** if you would like this task to pop up on your screen for the time set before the task
- 10 Click **Save**

Task Edit Save Save & New Task Save & New Event Check Spelling Cancel

Task Information

Assigned To

Task Activity Type

Subject

Due Date [10/2/2013]

Comments

Result

Status

Completed [10/2/2013]

Priority

- 11 To see a list of the outstanding tasks associated with this Move-In Planner, hover over 'Open Activities' in the baby words at the top of the screen

Move-In Planner 010366 Customize Page | Edit Layout | Printable View | Help for this Page

[Show Feed](#) [Open Activities](#) | [Activity History](#) | [Notes & Attachments](#) | [Residents](#) | [Approval History](#) | [Quoted Services](#) | [Suites](#)

Open Activities Open Activities Help

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Reserve Elevator		✓	9/17/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Assign Locker		✓	9/17/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Set Up Telephone		✓	9/17/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Set Up Cable		✓	9/17/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Prepare Keys		✓	9/24/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Prepare Welcome Gift		✓	9/24/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Create Resident on salesforce		✓	9/24/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Install Elevator Pads		✓	10/1/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Move Resident In		✓	10/1/2013	Not Started	Normal	Larry Wieskopf

Resident Prefix Resident Phone 1 (555) 555-5555

- 12 To see a list of the completed tasks associated with this Move-In Planner, hover over 'Activity History' in the baby words at the top of the screen

Move-In Planner 010366

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Open Activities (0) | **Activity History (4)** | Notes & Attachments (0) | Residents (1) | Approval History (0) | Quoted Services (0) | Suites (0)

Activity History Log A Call Mail Merge Send an Email View All Activity History Help

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Suite Inspection		✓	9/2/2013	Larry Wieskopf	10/2/2013 3:04 PM
Edit Del	Set Assessment Date		✓	9/2/2013	Larry Wieskopf	10/2/2013 3:04 PM
Edit Del	Set Date for Lease Signing		✓	9/1/2013	Larry Wieskopf	10/2/2013 3:01 PM
Edit Del	Provide New Resident Information Package		✓	9/1/2013	Larry Wieskopf	10/2/2013 3:01 PM

Current Suite Status Occupied Move In Incentive

Entering Recurring Charges on the Move-In Planner

Recurring charges are used for additional billing services, such as programs, laundry pendants, and television. They are also used to record marketing incentives. Defaults can be set up in the pricing table (see *How to Default Recurring Charges*).

- 1** Hover over 'Quoted Services' in the baby words and click **New Quoted Services**
- 2** Specify the **Billing Code**
- 3** Change the **Quantity** to 1.00
- 4** Enter a **Price**
- 5** Specify a **Start Date**
- 6** Specify a **Community**
- 7** Click **Save**

Quoted Services Edit Save Save & New Cancel

Information

Billing Code Telephone Move In Planner 010366

Description

Quantity 1.00

Price 35.00

Tax Code

Dates

Start Date 10/2/2013 [10/2/2013]

End Date [] [10/2/2013]

System Information

Community iaRetirement - GTA

Save Save & New Cancel