







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. There are three requirements to create a Move-In Planner: 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** Navigate to the Prospect's profile
- 2** Click **Create Move-In Planner**
- 3** Verify and, if necessary, correct the Prospect and 2nd Occupant Information in the top two sections

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

- 4 Select the **New Prospect Status**
- 5 Select the **Stay Type**
- 6 Specify the **Preferred Suite**
- 7 Specify the **Anticipated Move-In Date**
- 8 Enter the **Deposit Amount**
- 9 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)
- 10 Specify the **Deposit Date** (Note: Not required if *No Deposit*)
- 11 Review your information and select **Yes** in the **Create Move-In Planner** picklist
- 12 Click **Save**

▼ Move-In & Deposit Details

Status	Initial Call
New Prospect Status	<input type="text" value="Urgent Need ASAP"/>
Stay Type	<input type="text" value="Trial Stay"/>
Community	iaRetirement - GTA
Preferred Suite	<input type="text" value="312"/>
Anticipated Move-In Date	<input type="text" value="2/28/2013"/> [<input type="text" value="7/11/2013"/>]
Deposit Amount	<input type="text" value="500.00"/>
Document No.	<input type="text"/>
Payment Type	<input type="text" value="Cheque"/>
Deposit Date	<input type="text" value="2/14/2013"/> [<input type="text" value="7/11/2013"/>]
Create Move-In Planner	<input type="text" value="Yes"/>