



How to Submit a Move-In Incentive for Approval

Description

Use this function on the Move-In Planner to enter a move-in incentive for approval.

The system will:

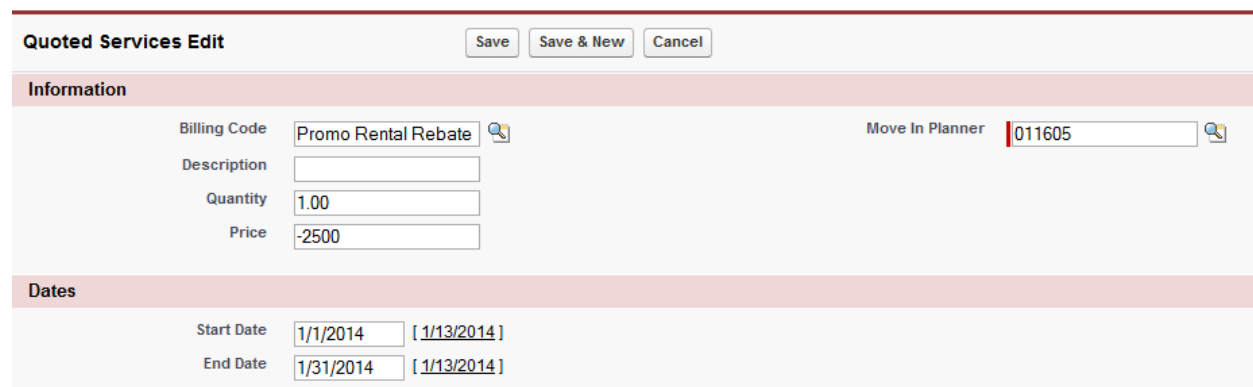
-  Record a move-in incentive on the Move-In Planner
-  Submit an approval request to your company's approver

Step by Step



- 1 Navigate to the Resident's Move-In-Planner
- 2 In the baby words at the top of the page, hover over "Incentives"
- 3 Click **New Incentive**
- 4 Specify *Promo Rental Rebate* as the **Billing Code**.
- 5 Enter the incentive as a negative amount under **Price**
- 6 Specify a **Start Date** for the incentive
- 7 Specify an **End Date** for the incentive

Note: For a one-month promotion, enter the first day of the month as the **Start Date** and the last day of the month as the **End Date**.

- 8 Click **Save**



The screenshot shows the 'Quoted Services Edit' form. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. Below the buttons is a section titled 'Information' with the following fields:

Billing Code	Promo Rental Rebate 	Move In Planner	011605 
Description	<input type="text"/>		
Quantity	<input type="text" value="1.00"/>		
Price	<input type="text" value="-2500"/>		

Below the 'Information' section is a section titled 'Dates' with the following fields:

Start Date	<input type="text" value="1/1/2014"/>	[1/13/2014]
End Date	<input type="text" value="1/31/2014"/>	[1/13/2014]

- 9 Click on the Move-In Planner number to get back to the Move-In Planner page
- 10 If the incentive is offered for more than one month (e.g., on the first month of each year), enter additional incentives.

- 11** When all incentives have been entered, verify the total in the **Total Incentives** field
- 12** Click **Submit for Approval**

[Open Activities \[0\]](#) |
 [Activity History \[0\]](#) |
 [Notes & Attachments \[0\]](#) |
 [Incentives \[0\]](#) |
 [Approval History \[0\]](#) |
 [Quoted Services \[1\]](#) |
 [Suites \[1\]](#)

Move-In Planner Detail

▼ **General**

Audit No.	011605	Assessment Date	
Inquirers Name	Malvina Brackman	Assessment Status	Pending
Stay Type	Permanent		
Original Prospect	<u>Brackman, Malvina (Malvina Brackman)</u>	Refund Date	
Anticipated End of Stay		Refund Status	
Current Suite Status	Occupied	Move-In Incentive Comments	
Confirm Program Change	<input type="checkbox"/>	Total Incentives	-\$2,500.00