



## How to Contact the Customer Success Team for Support

### Description

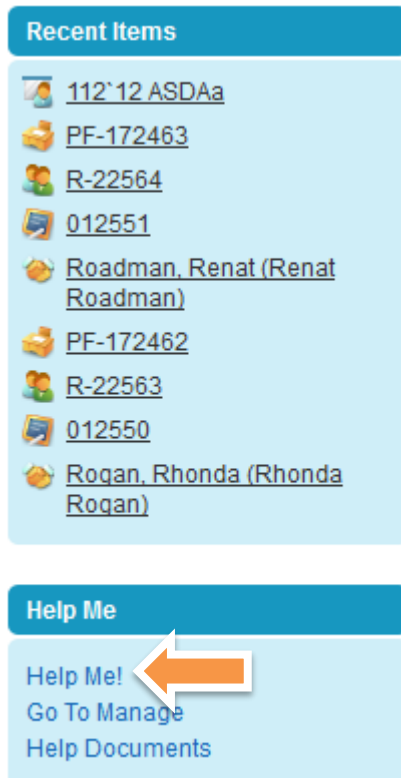
Use this function to contact our Customer Success Team with any support issues for which you have questions

The system will:










-  Send an email to the Customer Success Team
-  Include your name, phone number, and Community in the email

### Step by Step


- 1 Click **Help Me!** in the sidebar on the left-hand side of your Salesforce page



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**Help Me**

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- 2 Enter who or what you are inquiring about. For example, you can include the Prospect's or Resident's name, the Suite number, or an Audit number for a move-in planner
- 3 Enter a subject line explaining what you were trying to do

- 4 Enter a description of the question you have or the issue that you face when you try to do what needs to be done
- 5 Click **Send**. A confirmation note will appear at the bottom of the screen, confirming that your request was sent to our Customer Success Team.

**Send an Email to your Customer Success Team**

**Hello Neomi, How can we help you?**

Who or what is this about? (Resident, Suite, Prospect):

Adams, John

What are you trying to do? (EG. Transfer, Move-In):

Create a Move-In Planner

Please explain what you are trying to do and what happens :

How can I tell if a move-in planner has already been created for this Prospect or if I should be creating a new one?

Send