







# How to Create a Move-In Planner

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## 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 2<sup>nd</sup> 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 <sup>?</sup>	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** If your organization has entrance fee plans, specify an **Entrance Fee Type**. The **Entrance Fee** will auto-fill based on the combination of the suite and entrance fee type. NOTE: The Entrance Fee Type and Entrance Fee fields may not be active for your organization. Please contact our Customer Success Team if you would like to set up entrance fees for your organization.
- 8** Specify the **Anticipated Move-In Date**
- 9** Enter the **Deposit Amount**
- 10** 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)
- 11** Specify the **Deposit Date** (Note: Not required if *No Deposit*)
- 12** Review your information and select *Yes* in the **Create Move-In Planner** picklist
- 13** 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"/>