

How to Properly Schedule a Move Out:

Please follow the following steps in order to schedule your lead to move out.

1) Visit the lead's task page

Lead Information Vista Ridge of Seattle

Lead Contact: **Michael Banks**
75 6th Ave.
Seattle, WA 98119
michaelbanks@michaelbanks.net

Resident: Mary Poppins
marypoppins@disney.com

Decision Status: Decision Made (MoveIn or Closed)

Sales Phase: Move-In

Lead Status: A Lead

Tasks

+ Add new task ✓ Save changes ✕ Cancel changes Task Search Calendar

Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
09/02/2014 12:00 AM	All Day	Med	Move In		dparton	Yes	details	✕
08/01/2014 11:00 AM	1 hr	High	Tour	2nd tour with Michael	AGibb	Yes		✕
07/02/2014 12:00 AM	All Day	Med	Email	Independence Day Celebration Invite	BManilow	Yes		✕
06/20/2014 12:00 AM	All Day	Med	Call	confirm tour appt.	BManilow	Yes		✕
05/20/2014 12:00 AM	All Day	Med	Call	follow up	BManilow	Yes		✕
04/29/2014 12:00 AM	All Day	High	Call	tour followup	BManilow	Yes		✕
04/16/2014 12:00 AM	All Day	Med	Mail	Group task:chocolate festival	BManilow	Yes		✕
04/09/2014 5:00 AM	1 hr	High	Tour	w/Michael	BManilow	Yes		✕
04/02/2014 12:00 AM	All Day	Med	Mail	Group task:	BManilow	Yes		✕
04/02/2014 12:00 AM	All Day	Med	Mail	Group task:	BManilow	Yes		✕

1 - 10 of 10 items

Notes

New Notes:

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Lead Closed: f
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2) Select "Add New Task"

Lead Information

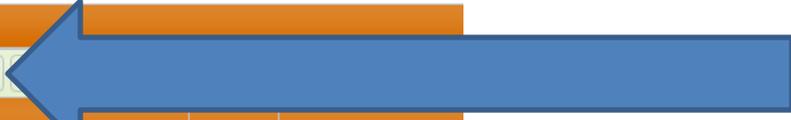
Lead Contact: **Michael Banks**
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michaelbanks@michaelbanks.net

Resident: Mary Poppins
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Tasks

+ Add new task

Due	Duration	Priority	Task
09/02/2014 12:00 AM	All Day	Med	Move In
08/01/2014 11:00 AM	1 hr	High	Tour



3) Under due date, please select the day they are scheduled to move out. If in the future, please select the future move-out date.

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Sales Phase: Move-In

Lead Status: A Lead ▾

Tasks

+ Add new task ✓ Save changes ⌛ Cancel changes Task Search Calendar

Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
10/01/2014 12:00 AM								
09/02/2014 12:00 AM	All Day	Med	Move In		dparton	Yes	details	✕
08/01/2014 11:00 AM	1 hr	High	Tour	2nd tour with Michael	AGibb	Yes		✕

4) Under the "Task" column, please select "Move-Out"

Tasks

+ Add new task ✓ Save changes ⌛ Cancel changes Task Search Calendar

Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
10/01/2014 12:00 AM	All Day	Med	Move Out		bmanilow	No		✕
09/02/2014 12:00 AM	All Day	Med	Home Visit		dparton	Yes	details	✕
08/01/2014 11:00 AM	1 hr	High	Deposit	2nd tour with Michael	AGibb	Yes		✕
07/02/2014 12:00 AM	All Day	Med	Assessment	Independence Day	BManilow	Yes		✕
06/20/2014 12:00 AM	All Day	Med	Transfer	Celebration Invite				
05/20/2014 12:00 AM	All Day	Med	Move Out					
04/29/2014 12:00 AM	All Day	High	Close - Lost Lead	followup	BManilow	Yes		✕
04/16/2014 12:00 AM	All Day	Med	Mail	Group task:chocolate	BManilow	Yes		✕

5) Select the appropriate person who will essentially own the task. This move out task will populate on that user's task list

Tasks

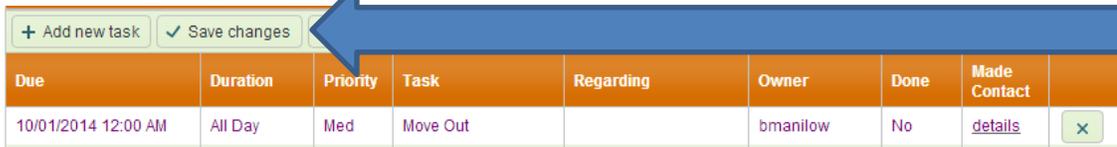
+ Add new task ✓ Save changes ⌛ Cancel changes Task Search Calendar

Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
10/01/2014 12:00 AM	All Day	Med	Move Out		bartmyers	No		✕
09/02/2014 12:00 AM	All Day	Med	Move In		bartmyers	Yes		✕
08/01/2014 11:00 AM	1 hr	High	Tour	2nd tour with Michael	BManilow			✕
07/02/2014 12:00 AM	All Day	Med	Email	Independence Day	dparton	Yes		✕

6) Leave the "No" under the "Done" column. This will show as an incomplete task and that the lead is scheduled to move out. Your task line should look similar to below:

Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
10/01/2014 12:00 AM	All Day	Med	Move Out		bmanilow	No	details	✕

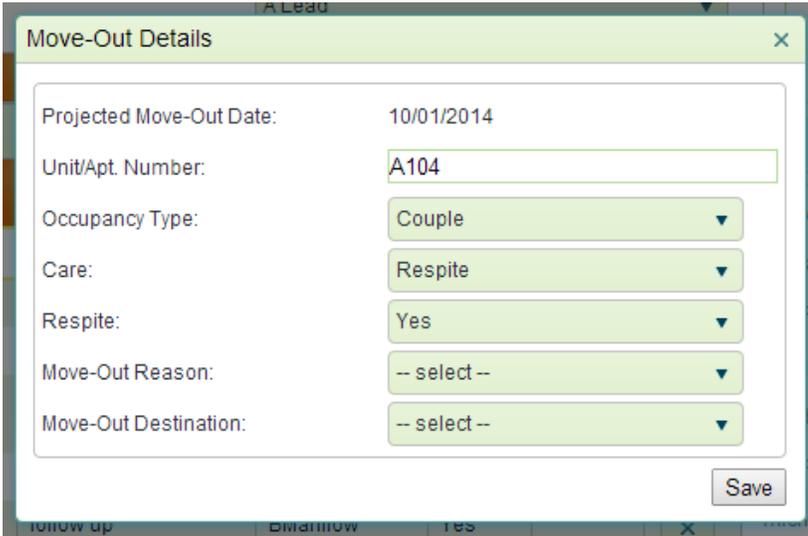
7) Select "Save Changes"



The screenshot shows a task list interface. At the top, there are two buttons: "+ Add new task" and "✓ Save changes". A large blue arrow points from the right towards the "Save changes" button. Below the buttons is a table with columns: Due, Duration, Priority, Task, Regarding, Owner, Done, Made Contact, and an action column. The first row contains the following data: Due: 10/01/2014 12:00 AM, Duration: All Day, Priority: Med, Task: Move Out, Regarding: (empty), Owner: bmanilow, Done: No, Made Contact: details, and an 'x' icon in the action column.

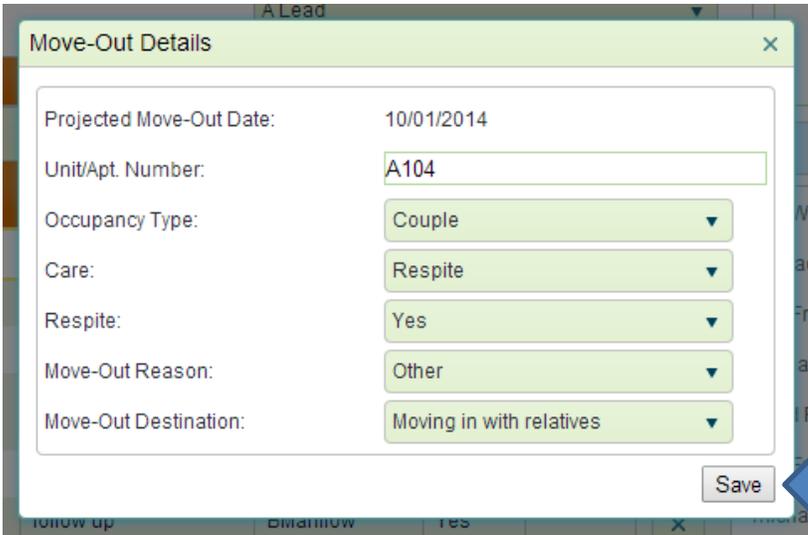
Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
10/01/2014 12:00 AM	All Day	Med	Move Out		bmanilow	No	details	x

8) A Move-Out Details window will pop up, please fill out the information as much as possible



The screenshot shows a "Move-Out Details" form window. The form contains the following fields and values: Projected Move-Out Date: 10/01/2014; Unit/Apt. Number: A104; Occupancy Type: Couple; Care: Respite; Respite: Yes; Move-Out Reason: -- select --; Move-Out Destination: -- select --. A "Save" button is located at the bottom right of the form.

9) Once filled, please select "Save"



The screenshot shows the same "Move-Out Details" form window as in the previous step. The "Move-Out Reason" field is now set to "Other" and the "Move-Out Destination" field is set to "Moving in with relatives". A large blue arrow points from the right towards the "Save" button at the bottom right of the form.

10) Select "Save Changes" once more



The screenshot shows the task list interface again. A large blue arrow points from the right towards the "Save changes" button. The table below it is identical to the one in step 7.

Due	Duration	Priority	Task	Regarding	Owner	Done	Made Contact	
10/01/2014 12:00 AM	All Day	Med	Move Out		bmanilow	No	details	x

11) The scheduled move out will reflect in reports and should not change the lead's "Decision Status" or "Sales Phase".

12) You've now successfully schedule your lead to move out! Once the lead has actually moved out, you will want to change the task to complete (from "No" to "Yes" under the "Done" column). This will change your sales phase to reflect "Move-out"

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Decision Status:
- select -

Sales Phase:
Move-Out

Lead Status:
A Lead

Tasks

+ Add new task ✓ Save changes ⌛ Cancel changes Task Search Calendar

Due	Duration	Priority	Task	Regarding	Owner	Done	Make Contact
10/01/2014 12:00 AM	All Day	Med	Move Out		bmanilow	Yes	
09/02/2014 12:00 AM	All Day	Med	Move In		dparton	Yes	Details
09/04/2014 11:00 AM	4.5h	High	Task	Call Mary with Michael	ASB	Yes	