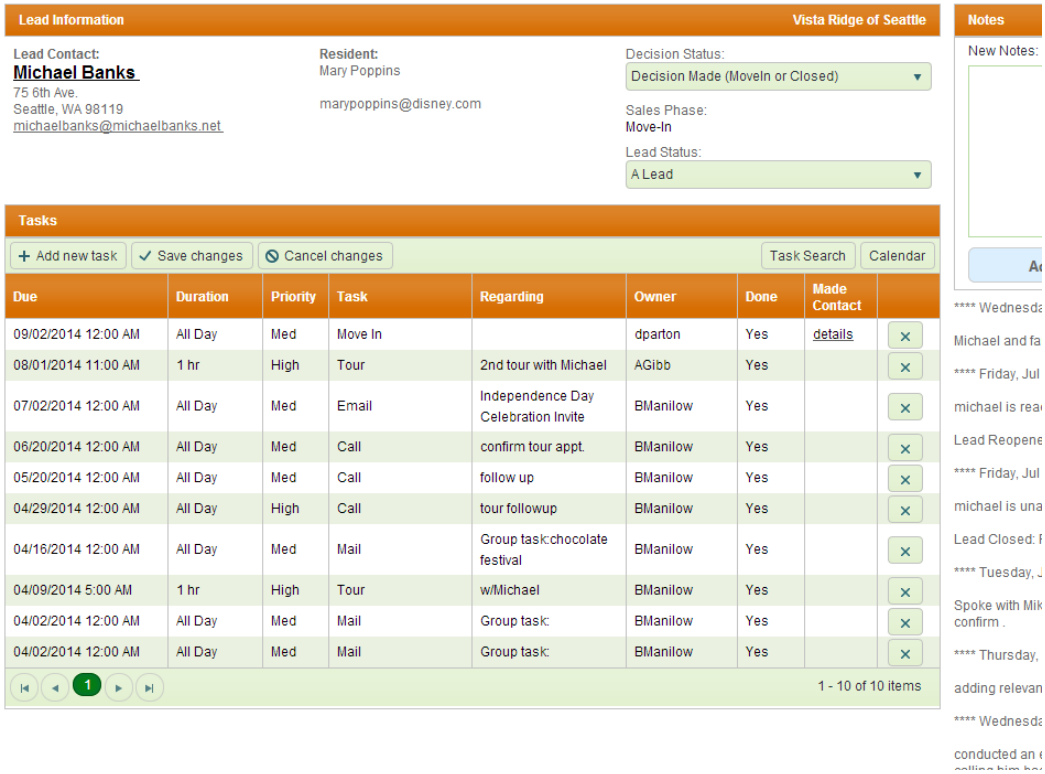
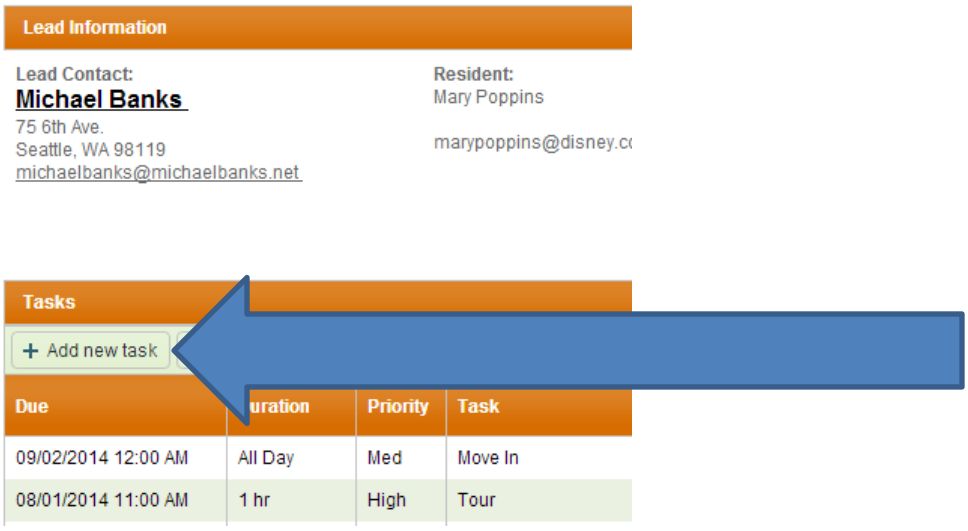
How to Properly Schedule a Move Out:

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

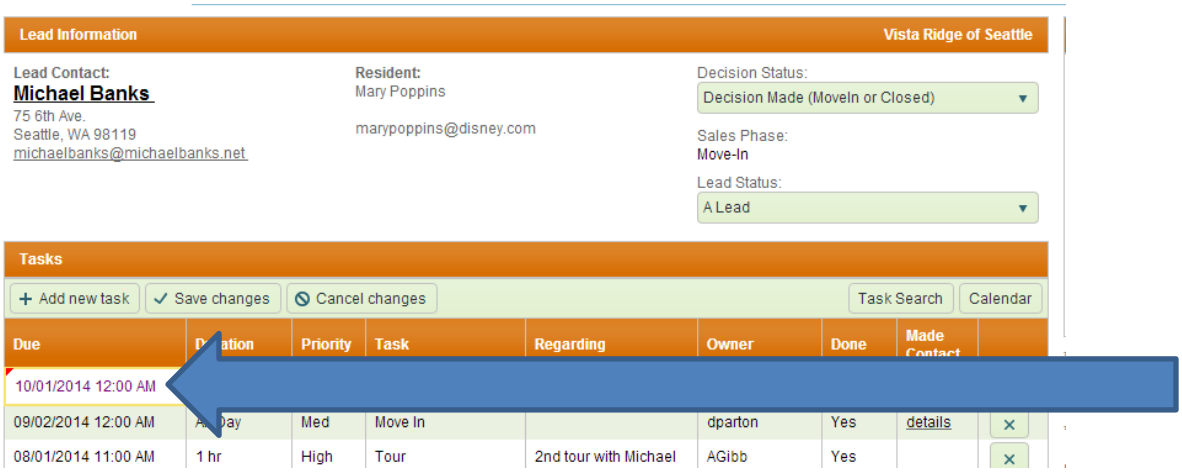
1) Visit the lead's task page



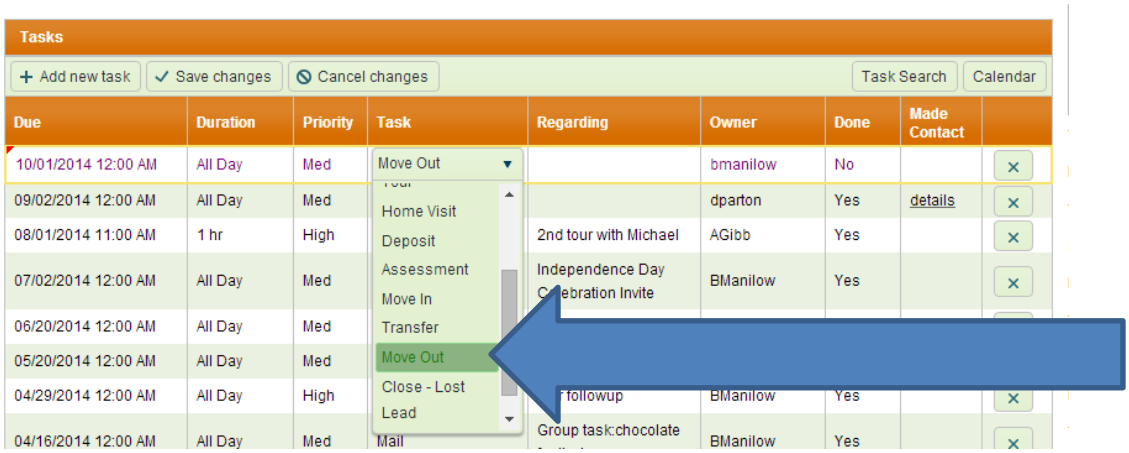
2) Select "Add New Task"



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.



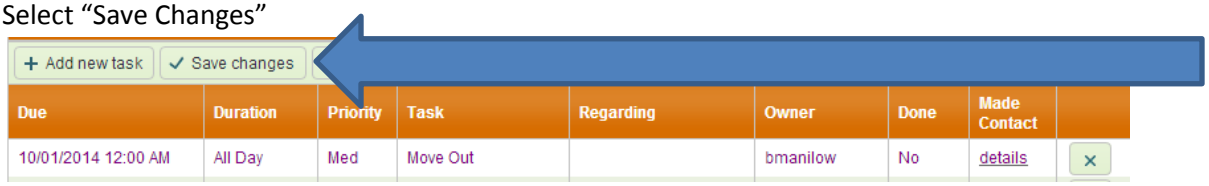
4) Under the "Task" column, please select "Move-Out"



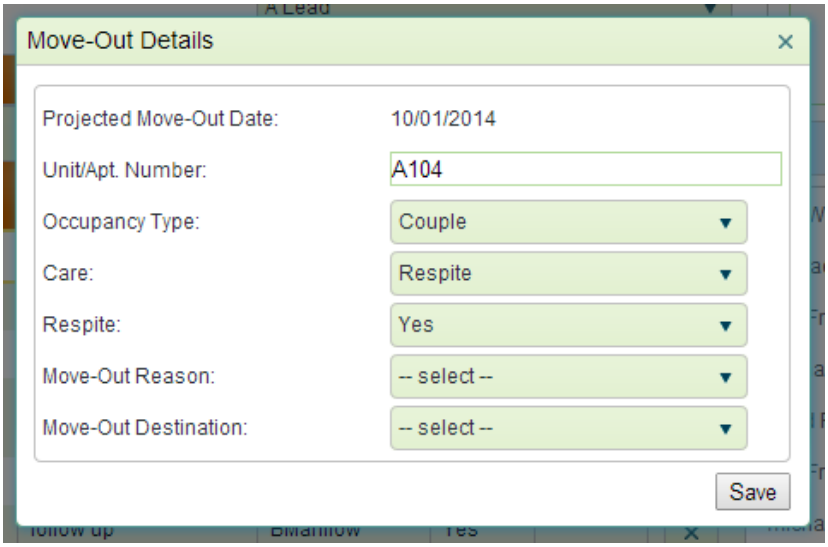
5) Select the appropriate person who will essentially own the task. This move out task will populate on that user's task list

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:

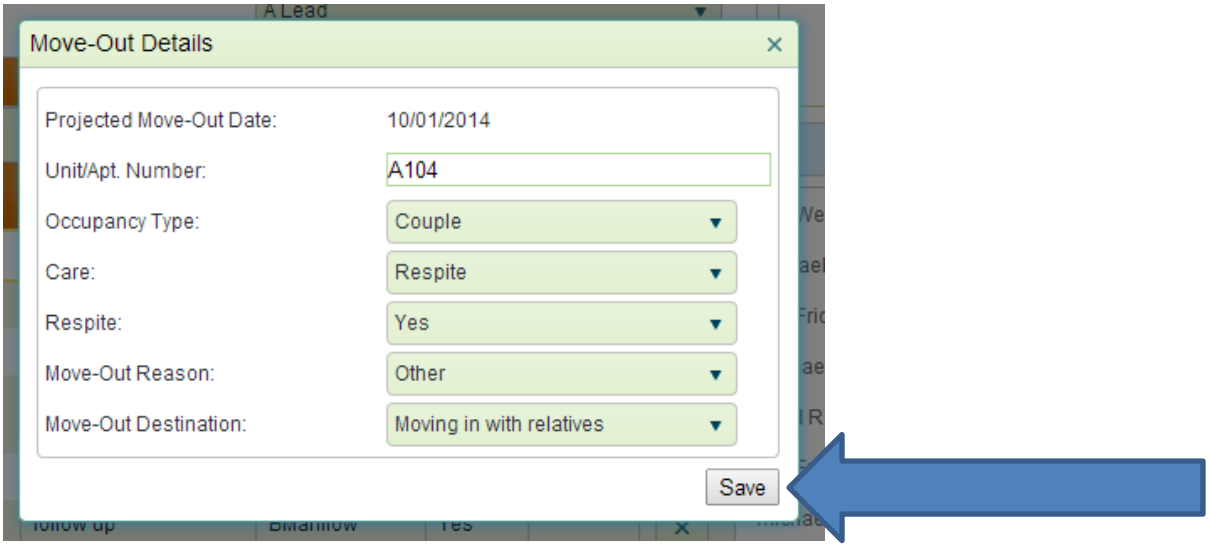
7) Select “Save Changes”



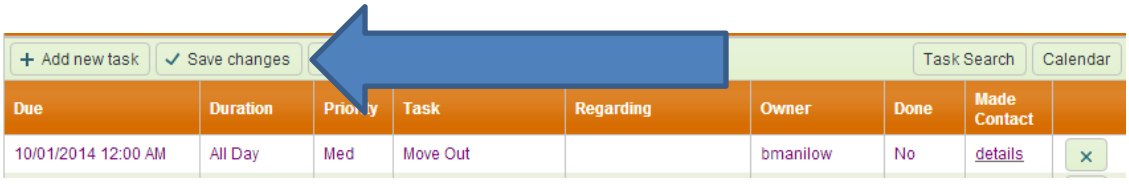
8) A Move-Out Details window will pop up, please fill out the information as much as possible

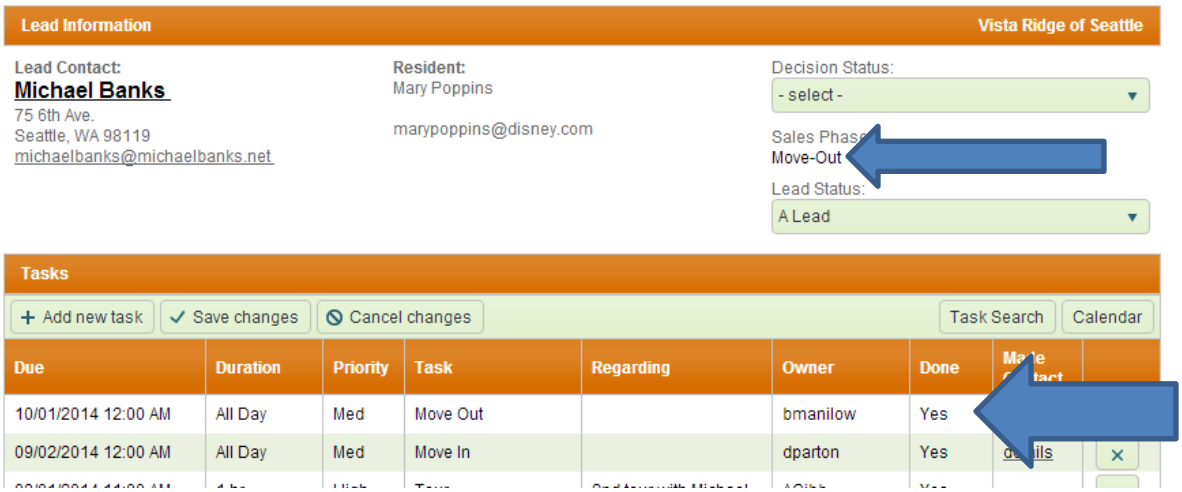


9) Once filled, please select “Save”



10) Select “Save Changes” once more



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"