

How to Schedule a Move In

1. Access the lead's task page (Activity link) and select "New Task".

The screenshot shows the YGL (you've got leads) interface. At the top, the navigation menu includes Home, Leads, Tasks, Sources, Inventory, and Reports. The main header displays the lead's name, Erin Nelson, along with contact information: (333) 555-3333 and ErinN@email.edu. Below this, there are buttons for 'Pre-Tour', 'A Lead', and 'Vern Harrison'. The 'Activity' tab is selected and highlighted with a blue arrow. Underneath, the 'Tasks (2)' section is visible, featuring a search icon, a calendar icon, and a 'New Task' button, which is also highlighted with a blue arrow.

2. Pick Move In for the task type from the drop down menu.

The 'New Task' form is displayed with a purple header and a green 'Save' button. The form fields are as follows: 'Type' is set to 'Move In' (highlighted with a blue arrow); 'Details' is an empty text box; 'Assigned To' is set to 'Rashida Hart'; 'Due Date' is set to '08/24/2018' with a time of '10:03 AM' and an 'All Day Task' checkbox checked; 'Duration' is an empty dropdown; 'Priority' is set to 'Med'; 'Done' is set to 'No'; and 'Contact' information is listed as Erin Nelson, 34 1st Avenue North, Allison Park PA 15101 US, with a home phone number of (333) 555-3333 (preferred).


- a. Complete the remaining selections accordingly.
 - 1. Due Date: This is the date the move in will take place. This can be scheduled as a task or appointment.
 - a. Task:
 - 1. Update the date by clicking on the calendar icon.
 - 2. Update the priority selection

New Task Save ×


Type: Move In

Details:

Assigned To: Rashida Hart

Due Date: 08/24/2018  11:37 AM All Day Task

Duration:

Priority: Med 

Done: No

Contact: Erin Nelson
Address
34 1st Avenue North
Allison Park PA 15101 US
Phone
Home: (333) 555-3333 (preferred)
Cell: (442) 555-3333

3. Update the unit information (Apt. Number, Number of people per unit, Occupancy type, Respite, and Payor source). The care selection will update based on how the unit was defined in YGL.

New Task Save ×

Cell: (112/333-0011)
Email
ErinN@email.edu

Unit/Apt. Number: ▼
* Indicates room is not included in inventory
Unit/Apt. Number is required

Number of people per unit: ▲▼

Occupancy Type: ▼ -- select --

Care: ▼ - select -

Respite: ▼

Payor Source: ▼

Save

4. Save

b. Appointment:

1. Uncheck the "All Day Task" checkbox.
2. Follow the steps for creating a task in addition to the steps below:
3. Update the date as well as the time.
4. The time is updated by clicking on the clock icon.
5. Update the duration
6. Remember to save.