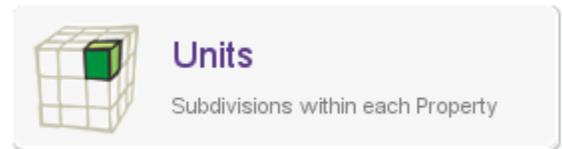
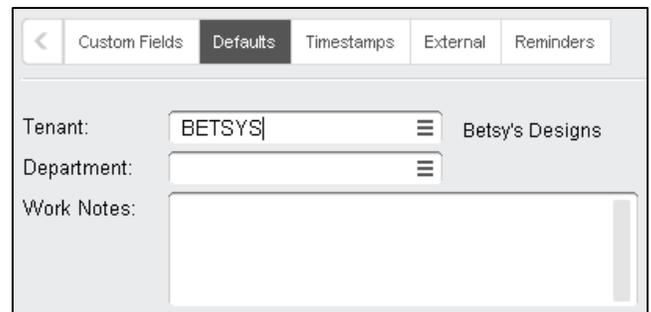


What to do if a brand new Client (Tenant) moves in

1. Go to the **Resources** tab and select the **Units** (Suites) capsule.
2. Search for the Unit that they are moving into.
3. Click on the 'key' to the change the record.
4. Under the **Defaults** tab, you need to clear the old Client from the Client field (it may be empty).
5. In the same Client field, type any letter and hit tab to select the new Client. The Client may not appear on the list since it is brand new, in this case you will need to click on the + icon at the top of the Choose Client window and “add on the fly.”



6. A New Client window will open up with the Unit record you were working on behind it.
7. Add the new client to the client capsule, by entering all of the information you know about this new client and then save the record.



Note: Tab from field to field. Do not use Enter. It will save the record and bring you back to the Unit record.

8. Save the change to the Unit record by clicking on the green checkmark.

What to do if a Client (Tenant) moves from one space to another

1. Go to the **Resources** tab and select the **Units** (Suites) capsule.
2. Search for the Unit that they are moving into.
3. Click on the 'key' to the change the record.
4. Under the **Defaults** tab, you need to clear the old Client from the Client field (it may be empty).
 - o If the Client moving into the Unit is already set up in the Client capsule:
 - Stay in the Client field and type any letter and hit Tab.
 - Select the Client that is moving into the Unit from the Client List.
 - Save the change to the Unit record by clicking on the green checkmark.
 - o If the Client moving into the Unit is new and has not been set up in the Client capsule:
 - Stay in the Client field and type any letter and hit Tab.
 - Click on the + icon at the top of the Choose Client window and “add on the fly.”

Note: Tab from field to field. Do not use enter Enter. It will save the record and bring you back to the Unit record.

- Enter all the information for this new client.
 - Save the new client by clicking the green checkmark.
5. Save the change to the Unit record by clicking the green checkmark.

What to do if a Client (Tenant) is moving out of a Unit and not into a new one

1. Go to the **Resources** tab and select the **Units** (Suites) capsule.
2. Search for the Unit that they are moving out of.
3. Click on the 'key' to the change the record.
4. Under the **Defaults** tab, you need to clear their name from the Client field.
5. In the Client field type VACANT (if you have a fake client "VACANT") or leave it blank.
6. Save the change to the Unit by clicking the green checkmark.

