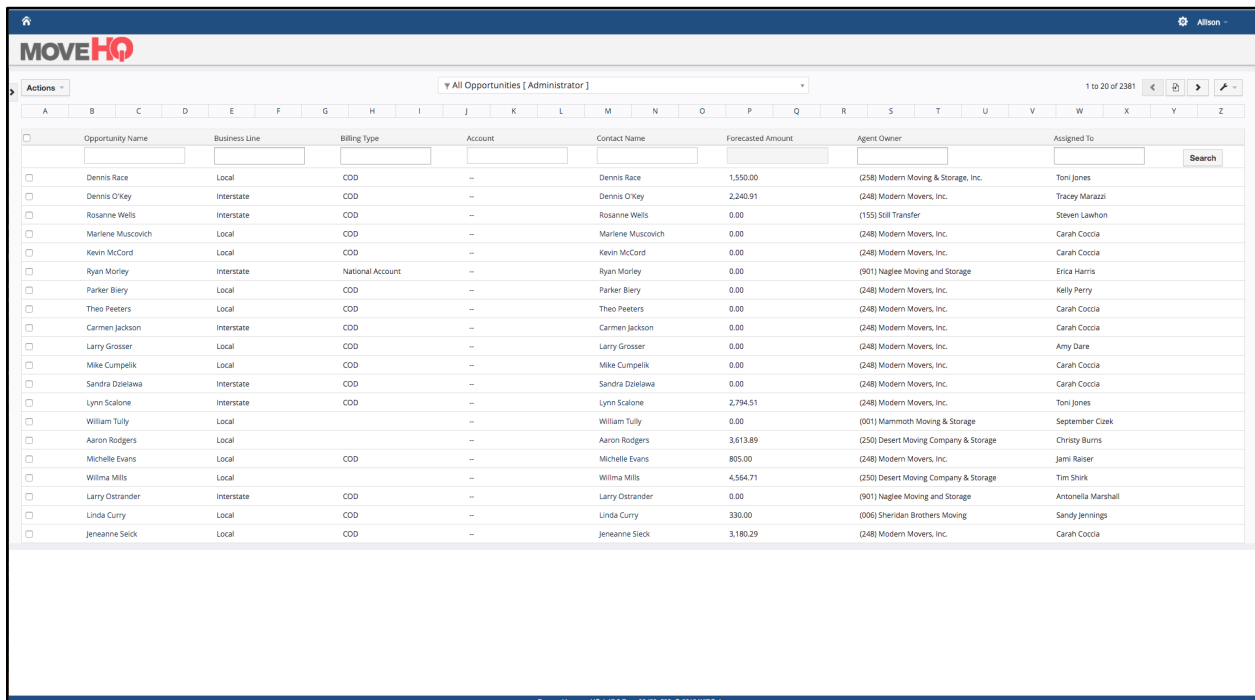


## Managing Reservations

To manage your reservations, click on the “Opportunities” shortcut link under the **Opportunities** module on the **MoveHQ homepage**.

Whenever a reservation is made by an Updater User, an opportunity with all of their information will generate on this page. Click on that opportunity’s name to see a summary of the Opportunity including their contact info, the offer price that was given to that person, and any documents associated with the opportunity such as their inventory list and order of service.



The screenshot shows the MoveHQ web interface for managing opportunities. At the top, there's a navigation bar with the MoveHQ logo and a user profile 'Allison'. Below the navigation bar, there's a search bar and a dropdown menu for 'All Opportunities [Administrator]'. The main content area is a table with columns for Opportunity Name, Business Line, Billing Type, Account, Contact Name, Forecasted Amount, Agent Owner, and Assigned To. The table lists 20 opportunities, each with a checkbox for selection. The footer of the page indicates it is powered by moveHQ 1.17.0 Rev 400000000 © 2018 WRECO, Inc.

Opportunity Name	Business Line	Billing Type	Account	Contact Name	Forecasted Amount	Agent Owner	Assigned To
<input type="checkbox"/> Dennis Race	Local	COO	--	Dennis Race	1,550.00	(258) Modern Moving & Storage, Inc.	Toni Jones
<input type="checkbox"/> Dennis O'Key	Interstate	COO	--	Dennis O'Key	2,240.91	(248) Modern Movers, Inc.	Tracey Marazzi
<input type="checkbox"/> Rosanne Wells	Interstate	COO	--	Rosanne Wells	0.00	(155) Still Transfer	Steven Lawhon
<input type="checkbox"/> Marlene Muscovich	Local	COO	--	Marlene Muscovich	0.00	(248) Modern Movers, Inc.	Carah Coccia
<input type="checkbox"/> Kevin McCard	Local	COO	--	Kevin McCard	0.00	(248) Modern Movers, Inc.	Carah Coccia
<input type="checkbox"/> Ryan Morley	Interstate	National Account	--	Ryan Morley	0.00	(901) Naglee Moving and Storage	Erica Harris
<input type="checkbox"/> Parker Biery	Local	COO	--	Parker Biery	0.00	(248) Modern Movers, Inc.	Kelly Perry
<input type="checkbox"/> Theo Peeters	Local	COO	--	Theo Peeters	0.00	(248) Modern Movers, Inc.	Carah Coccia
<input type="checkbox"/> Carmen Jackson	Interstate	COO	--	Carmen Jackson	0.00	(248) Modern Movers, Inc.	Carah Coccia
<input type="checkbox"/> Larry Grosser	Local	COO	--	Larry Grosser	0.00	(248) Modern Movers, Inc.	Amy Dare
<input type="checkbox"/> Mike Cumpelik	Local	COO	--	Mike Cumpelik	0.00	(248) Modern Movers, Inc.	Carah Coccia
<input type="checkbox"/> Sandra Dzielawa	Interstate	COO	--	Sandra Dzielawa	0.00	(248) Modern Movers, Inc.	Carah Coccia
<input type="checkbox"/> Lynn Scalone	Interstate	COO	--	Lynn Scalone	2,794.51	(248) Modern Movers, Inc.	Toni Jones
<input type="checkbox"/> William Tully	Local	COO	--	William Tully	0.00	(001) Mammoth Moving & Storage	September Czek
<input type="checkbox"/> Aaron Rodgers	Local	COO	--	Aaron Rodgers	3,613.89	(250) Desert Moving Company & Storage	Christy Burns
<input type="checkbox"/> Michelle Evans	Local	COO	--	Michelle Evans	805.00	(248) Modern Movers, Inc.	Jamie Raiser
<input type="checkbox"/> Wilma Mills	Local	COO	--	Wilma Mills	4,564.71	(250) Desert Moving Company & Storage	Tim Shirk
<input type="checkbox"/> Larry Ostrander	Interstate	COO	--	Larry Ostrander	0.00	(901) Naglee Moving and Storage	Antonella Marshall
<input type="checkbox"/> Linda Curry	Local	COO	--	Linda Curry	330.00	(006) Sheridan Brothers Moving	Sandy Jennings
<input type="checkbox"/> Jeneanne Sieck	Local	COO	--	Jeneanne Sieck	3,180.29	(248) Modern Movers, Inc.	Carah Coccia

In this section, one of the most important field is the Status field. To access the status click on “Opportunity Details,” and then “Edit” and you will see a dropdown for status. It is **EXTREMELY** important to keep this status up to date at all times, as the Updater user will be notified of the status in their updater account.

When a reservation is made the opportunity status will default to **Reserved**. Once you’ve made contact and scheduled the move with the customer make sure that you change the status to **Confirmed** - This is very important because it will notify the customer that the move has been booked in their Updater account. On the

other hand it is also very important to mark the opportunity as **Cancelled** if that is the case. This will also notify the customer of the status. This will be really helpful in avoiding a lot of phone calls from confused customer who either confirmed or cancelled their move but are confused because the status in Updater says something different. Finally, once the move is complete, mark the opportunity as **Completed**. This will also help you keep track of how many moves you've completed, and will allow the opportunity to leave your company a review.

Keep in mind that this section will be automatically updated when an Updater User reserves a move, but you will also receive an email to the email address(es) you set up back in the **Email Notifications** section.

Again, make sure that the status of each opportunity is up-to-date within this section because it will give the user insight into the status of their move.