

How to Manage Wait Lists

Description

Use this function when adding a prospect to a Wait List. Wait Lists are used when at least one criterion required to **Create a Move-In Planner** is missing, such as a deposit, a preferred available suite or a reasonable move-in date. Other Wait Lists situations include communities where deposits are required long before the resident moves in, construction phases or no suite availability. Both prospects and residents can be waitlisted. For instructions on Creating a Wait List, please see *How to Create a Wait List*.

Field Explanations

- 1 Access the Wait List from the Prospect profile related list, Resident profile related list, or Wait List Management tab

Wait List Management		Wait List Management Help ?	
Action	Wait List ID	Created Date	Status
Edit Del	Sawyers, John (John & Mary) - Plan A:Plan B - Sunny Suite Facing Park	3/9/2013	Waiting
Edit Del	Sawyers, John (John & Mary) - Plan A:Plan B - Balcony	3/9/2013	Waiting

- 2 **Wait List ID** - The system calculates the Wait List ID as follows:

- Inquirer and Prospect(s) Names +
- Floor Plan(s) +
- Description

The field limit is 80 characters; any additional characters truncated will be visible in the respective fields.

The **Wait List ID** is only calculated when created from the Prospect profile

- 3 **Prospect Name** or **Resident ID**

- 4 **Deposit** - Read only

- 5 **Comments** – Internal use only


- 6 **Floor Plan(s)**

- 7 **Wait List Date** – The date the prospect was originally placed on the wait list

- 8 **Status** has five options:

- **Waiting** – The prospect has been added to the Wait List
- **Offered** – One of the choices has been offered to the prospect or resident but there has not been a response
- **Confirmed** – The prospect has confirmed that he or she is taking the unit

- **Cancelled** – The prospect or resident has declined the available unit; **Status** changes to *Cancelled* automatically when **Closing a Prospect File**. Best practice is to create a new Wait List record if the prospect wants to remain on the Wait List.
- **Complete** - The wait list is completed; **Status** changes to *Complete* automatically when **Creating a Move-In Planner**
- **Hold Room Until** – Specify a date when offering a suite to a prospect in order to limit the time the offer is available
- **Priority** – Regular, Urgent or Critical
- **Preferences** - Specify as required


Wait List Management
 **Sawyers, John (John & Mary) - Plan A;Plan B - Balcony**

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Wait List Management Detail

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Wait List ID	Sawyers, John (John & Mary) - Plan A;Plan B - Balcony	Owner	 Larry Wieskopf [Change]
Prospect	Sawyers, John (John & Mary)	Community ID	iaRetirement - GTA
Resident Name			
Deposit	\$1,000.00		
Comments	They really want to have morning sun exposure!		
Floor Plan	Plan A; Plan B		
Wait List Date	3/9/2013		

▼ **Status**

Status	Waiting	Priority	Regular
Status Date	3/10/2013		
Hold Room Until			

▼ **Preferences**

Preferred Suite	312	Requests	Sunny room with a balcony
Preferred Move-in Date	2/28/2013		

▼ **System Information**

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