How to Place a Prospect on a Waitlist

Description

Waitlist Management allows for the recording of deposits and room requests in situations with insufficient Prospect data. It can also be used if the Community is fully occupied or if the Prospect is not fully set on moving in.

The following information is required:

- Deposit amount
- Move-in date
- Available suite

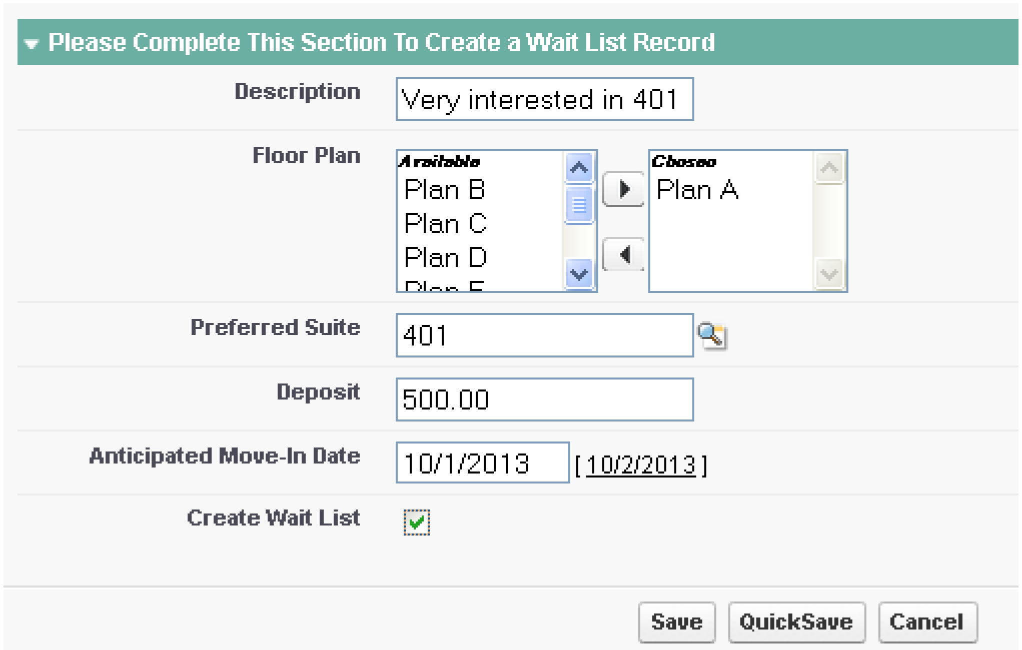
The system will:

- Create a Waitlist Management record
- Create a Resident Transaction if the deposit amount is filled in

Step by Step

1. Navigate to the Prospect's record page
2. Click **Create Waitlist**
3. Enter a short **Description**
4. Select a **Floor Plan**
5. Select a **Preferred Suite** if one has been reserved
6. Enter a **Deposit** if applicable
7. Enter an **Anticipated Move-In Date**
8. Verify the data and check off the **Create Wait List** checkbox

Updated: October 4, 2013


Please Complete This Section To Create a Wait List Record
Description
Very interested in 401
Floor Plan
Available
Plan B
Plan C
Plan D
Chosen
Plan A
Preferred Suite
401
Deposit
500.00
Anticipated Move-In Date
10/1/2013
[10/2/2013]
Create Wait List
Save
QuickSave
Cancel