



# How to Create and Manage a Wait List Entry

## Description

Use the Wait List function to place a Prospect on a wait list for a particular suite or suite type. A wait list entry should be created either when the Community is full, or when a deposit is given with no known suite number or expected move-in date.

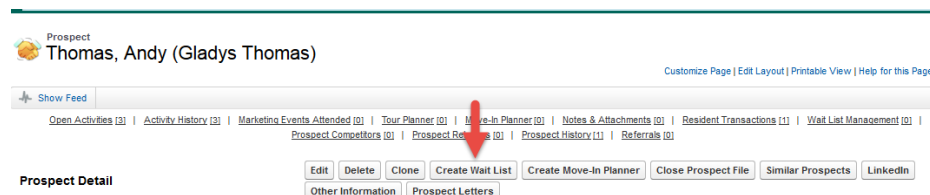
The system will:

-  Create a wait list entry on the Prospect File
-  Create a Resident Transaction if a deposit is recorded

## Step by Step

### Create Wait List

- 1 Navigate to the Prospect's profile
- 2 Click the **Create Wait List** button



- 3 Select wait list **Type**
- 4 Enter an optional **Description**
- 5 Select **Floor Plan** if the Prospect is waiting for a particular suite type. You may select more than one floor plan.
- 6 Specify **Preferred Suite** if the Prospect is waiting for a particular suite
- 7 Enter **Deposit** amount if the Prospect is leaving a wait list deposit. If a wait list deposit is recorded, a resident transaction will be created on the Prospect's file.
- 8 Select **Deposit Type**
- 9 Specify **Deposit Date**
- 10 Select **Payment Type**
- 11 Specify an optional **Anticipated Move-In Date**
- 12 Verify the data and check off **Confirm and Create**

Updated: September 4, 2015

**13** Click **Save**

**▼ Please Complete This Section To Create a Record**

Type: Wait List

Description:

Floor Plan:
 

Available	▶	Chosen	▲
2 Bedroom		1 Bedroom	
2 Bedroom + Den		1 Bedroom + Den	
3 Bedroom	▼		▼

Preferred Suite:

Deposit:

Deposit Type: Application Fee

Deposit Date:  [9/6/2015]

Payment Type: Cash

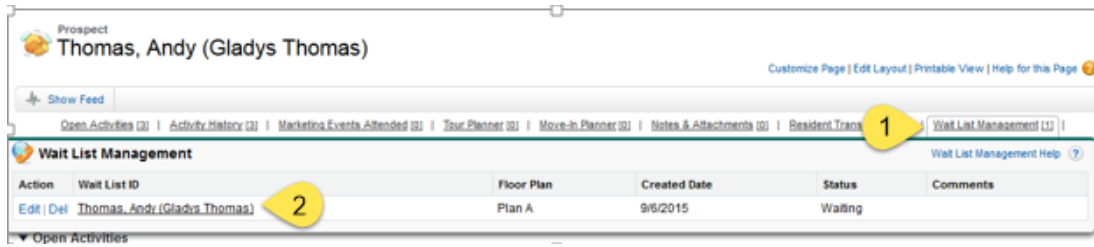
Anticipated Move-In Date:  [9/6/2015]

[REDACTED]

Confirm and Create

**Manage Wait List**

- 1** Navigate to the Prospect's profile
- 2** In the baby words at the top of the page, hover over **Wait List Management**
- 3** Click on the Wait List ID



Prospect: **Thomas, Andy (Gladys Thomas)**

Navigation: [Open Activities \(3\)](#) | [Activity History \(3\)](#) | [Marketing Events Attended \(3\)](#) | [Tour Planner \(3\)](#) | [Move-In Planner \(3\)](#) | [Notes & Attachments \(3\)](#) | [Resident Trans...](#) | **1** [Wait List Management \(1\)](#)

Action	Wait List ID	Floor Plan	Created Date	Status	Comments
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Thomas, Andy (Gladys Thomas)</a> <b>2</b>	Plan A	9/6/2015	Waiting	

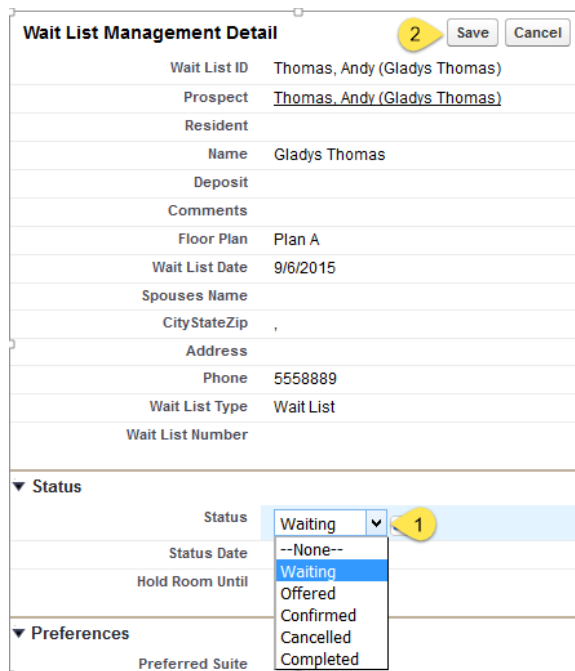
**4** Edit the wait list **Status** by selecting one of the following statuses:

Waiting	The Prospect is waiting for their desired floor plan or suite to become available
Offered	A suite has been offered to the Prospect
Confirmed	The Prospect has accepted the offer

Create and Manage Wait List

Cancelled	The Prospect has cancelled their wait list
Completed	A move-in planner has been created. The Prospect is no longer on the wait list.
Replaced	Optional indicating this line has been replaced with a more recent wait list item

5 Click **Save**



**Note:** If a wait list deposit has been given and the wait list has been *Cancelled*, the resident transaction will not be refunded automatically. This is because some Prospects will have multiple wait lists or will transfer their deposit to a new wait list. If the deposit needs to be refunded, please see “How to Refund a Resident Transaction”.

**Dates:**

Wait List Date – The date the wait list was originally created

Status Date – The date the status was last changed

Hold Until Date – The date the suite should be held until

1	Wait List Date	9/6/2015
	Spouses Name	
	CityStateZip	
	Address	
	Phone	5558889
	Wait List Type	Wait List
	Wait List Number	
<b>tus</b>		
	Status	Offered
2	Status Date	9/9/2015
3	Hold Room Until	11/1/2015