

How to Create and Manage Wait List Entries





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.

Step by Step

Create Wait List

The system will:

-  Create a wait list entry on the “Wait List Management” list related to a prospect File
-  Create a Resident Transaction if a deposit is recorded
-  Change the Status on the prospect file to *Wait List*
-  Record wait list information on the prospect profile page if your organization is configured to record this information

- 1** Navigate to the Prospect’s profile
- 2** Click the **Wait List Management** action
- 3** Select wait list **Type**
- 4** Enter an optional **Description**
- 5** Select a **Preferred Floor Plan**
- 6** Select **Alternate Floor Plans**
- 7** Select a **Preferred Location** if applicable
- 8** Specify **Preferred Suite** if the Prospect is waiting for a particular suite
- 9** 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.
- 10** Select **Deposit Type**
- 11** Specify **Deposit Date**
- 12** Specify **Wait List Date**
- 13** Enter a **Document No.** to record a cheque/check number if applicable
- 14** Select **Payment Type**
- 15** Specify an optional **Anticipated Move-In Date**


16 Verify the data and check off **Confirm and Create**

17 Click **Save**

Type	Wait List		
Description	<input type="text"/>		
Preferred Floor Plan	1 Bedroom		
Alternate Floor Plans	Available Studio 1 Bedroom Penthouse	▶ ◀	Chosen 2 Bedroom
Preferred Location	Available Tower	▶ ◀	Chosen River View
Preferred Suite	<input type="text"/>		
Deposit	500		
Deposit Type	Priority Deposit		
Deposit Date	4/11/2016 [4/11/2016]		
Wait List Date	4/11/2016 [4/11/2016]		
Document No.	123		
Payment Type	Check		
Anticipated Move-In Date	<input type="text"/> [4/11/2016]		
Wait List Number	<input type="text"/>		
Confirm and Create	<input checked="" type="checkbox"/>		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Manage Wait List

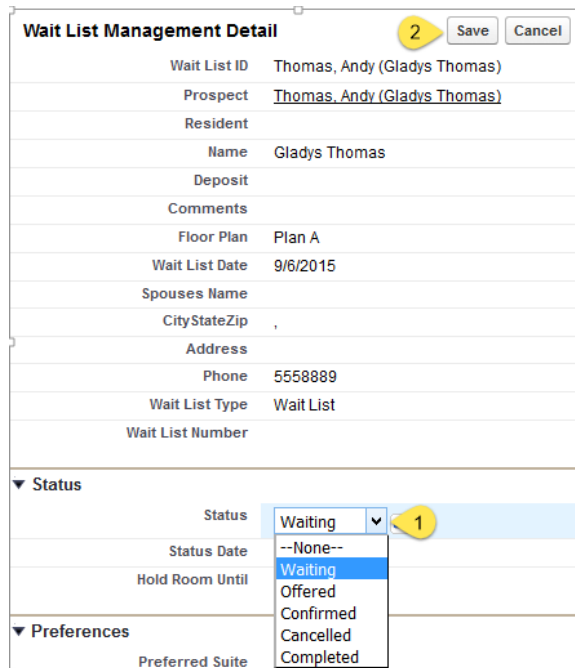
- 1** Navigate to the Prospect's profile
- 2** On the Related tab, scroll to **Wait List Management**
- 3** Click on the Wait List ID

Wait List Management (1)				
WAIT LIST ID		STATUS	COMMENTS	WAIT LIST DATE
Tishler, Gabriella (Eric & Angelina)		Waiting		4/11/2016 <input type="button" value="▼"/>
View All				

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
Completed	A move-in planner has been created. The Prospect is no longer on the wait list.

5 Click **Save**



Wait List Management Detail 2 Save Cancel

Wait List ID: Thomas, Andy (Gladys Thomas)

Prospect: Thomas, Andy (Gladys Thomas)

Resident Name: Gladys Thomas

Deposit: _____

Comments: _____

Floor Plan: Plan A

Wait List Date: 9/6/2015

Spouses Name: _____

CityStateZip: _____

Address: _____

Phone: 5558889

Wait List Type: Wait List

Wait List Number: _____

▼ Status

Status	Waiting	1
Status Date	--None--	
Hold Room Until	Waiting	
	Offered	
	Confirmed	
	Cancelled	
	Completed	

▼ Preferences

Preferred Suite: _____

Dates:

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

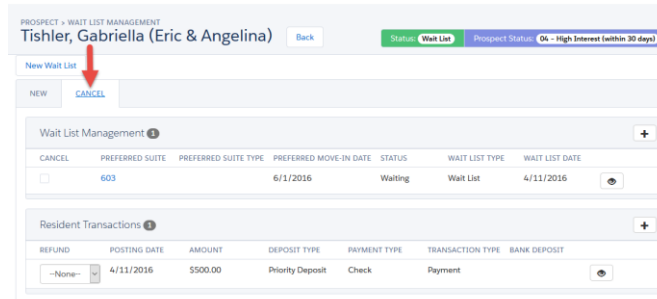
Status Date – The date the status was last changed

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	
<hr/>		
	Status	Offered
2	Status Date	9/9/2015
3	Hold Room Until	11/1/2015

Cancel a Wait List

- 1 Navigate to the Prospect's profile
- 2 Click the **Wait List Management** action
- 3 Click the **Cancel** tab



- 4 Select the wait list that you would like to cancel
- 5 If a resident transaction needs to be refunded, find the resident transaction line in the Resident Transactions section. If no refund is being given, skip to step 7.
- 6 In the **Refund** picklist, select *Refund*, *Returned*, or *Shredded*
- 7 In the Prospect Information section, select a new **Prospect Status**
- 8 Select a new **Status** if the prospect will no longer have an active wait list record. If a **Status** of *Lost* or *Unqualified* is selected, a new section will open beneath the Prospect Information section.
- 9 Select a new **Wait List Type** or select *None* if the prospect will no longer have an active wait list record
- 10 Enter a new **WL Date** or delete the date if the prospect will no longer have an active wait list record
- 11 Enter a new **WL Number** if applicable

Create and Manage Wait Lists

- 12** Select a **Cancellation Reason Code**. If you have selected a **Status** of *Lost* or *Unqualified* in step 8, continue to step 13 to close the prospect file. Otherwise, skip to step 18.
- 13** In the Close Prospect File Information section, select a **Reason Code** for closing the prospect file
- 14** Select a **Destination**
- 15** Enter optional **Reason For Loss Notes**
- 16** Specify **Date Closed**
- 17** Specify an optional **Competitor**
- 18** Click **Cancel/Refund and Update Prospect**

PROSPECT - WAIT LIST MANAGEMENT
Tishler, Gabriella (Eric & Angelina) Back Status: **Wait List** Project Status: **On - High Interest (within 30 days)**

[New Wait List](#)

Wait List Management

CANCEL	PREFERRED SUITE	PREFERRED SUITE TYPE	PREFERRED MOVE-IN DATE	STATUS	WAIT LIST TYPE	WAIT LIST DATE
<input checked="" type="checkbox"/>	603		6/1/2016	Waiting	Wait List	4/21/2016

Resident Transactions

REFUND	POSTING DATE	AMOUNT	DEPOSIT TYPE	PAYMENT TYPE	TRANSACTION TYPE	BANK DEPOSIT
<input checked="" type="checkbox"/>	4/21/2016	\$500.00	Priority Deposit	Check	Payment	

Prospect Information

[To Cancel](#) [To Refund](#)

New Prospect Status
02 - Some Interest (within 1 yr)

My Community
BHS Sample Community

WL Number

New Status
Lost

Wait List Type
None

WL Date
4/21/2016

Cancellation Reason Code
Went to competitor

Close Prospect File Information

Reason Code
Did not like building amenities

Reason For Loss Notes

Competitor
Mt. Seazy Seniors Paradise

Destination
Moving to a competitor Assisted Living facility

Date Closed
4/21/2016

Cancel/Refund and Update Prospect