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.
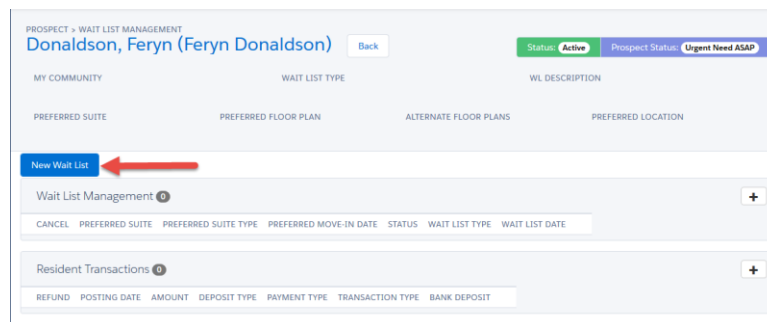
Step by Step

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
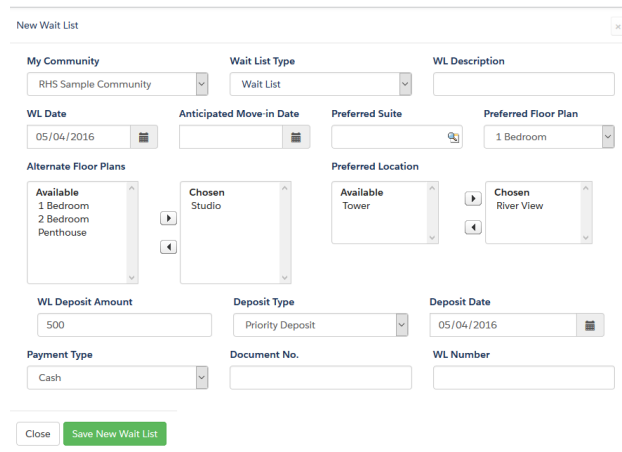
1 Navigate to the prospect's profile
2 Click the **Wait List Management** action
3 Click **New Wait List**

4 Select **My Community**
5 Select **Wait List Type**
6 Enter an optional **WL Description**
7 Specify **WL Date**
8 Specify an optional **Anticipated Move-In Date**

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9   Specify **Preferred Suite** if the prospect is waiting for a particular suite

10   Select a **Preferred Floor Plan**

11   Select **Alternate Floor Plans**

12   Select a **Preferred Location** if applicable

13   Enter **WL 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.

14   Select **Deposit Type**

15   Specify **Deposit Date**

16   Select **Payment Type**

17   Enter a **Document No.** to record a cheque/check number if applicable

18   Enter a **WL Number** if applicable

19   Click **Save New Wait List**

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**

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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**

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Dates:

WL Date – The date the wait list was originally created

Status Date – The date the status was last changed

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

Cancel a Wait List

1 Navigate to the Prospect's profile

2 Click the **Wait List Management** action

3 Select the wait list that you would like to cancel

4 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.

5 In the **Refund** picklist, select *Refund, Returned,* or *Shredded*

6 In the Prospect Information section, select a new **Prospect Status**

7 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.

8 Select a new **Wait List Type** or select *None* if the prospect will no longer have an active wait list record

9 Enter a new **WL Date** or delete the date if the prospect will no longer have an active wait list record

10 Enter a new **WL Number** if applicable

11 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.

12 In the Close Prospect File Information section, select a **Reason Code** for closing the prospect file

13   Select a **Destination**

14   Enter optional **Reason For Loss Notes**

15   Specify **Date Closed**

16   Specify an optional **Competitor**

17   Click **Cancel/Refund and Update Prospect**