

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.

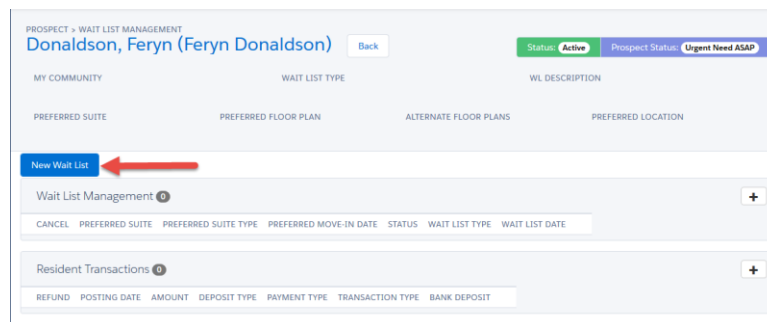
Step by Step

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

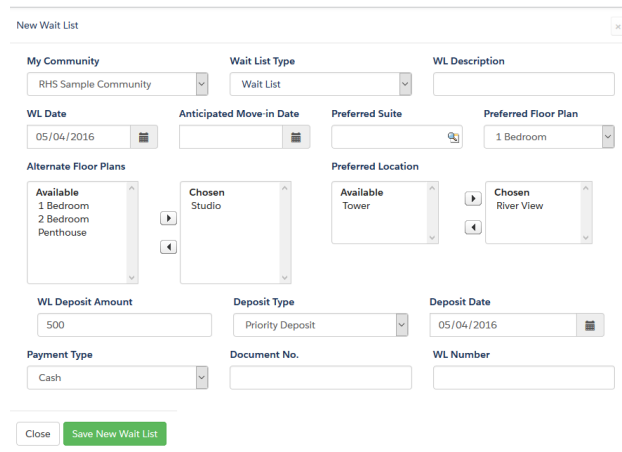
- 1 Navigate to the prospect’s profile
- 2 Click the **Wait List Management** action
- 3 Click **New Wait List**



PROSPECT - WAIT LIST MANAGEMENT	Donaldson, Feryn (Feryn Donaldson)	Back	Status: Active	Prospect Status: Urgent Need ASAP		
MY COMMUNITY	WAIT LIST TYPE	WL DESCRIPTION				
PREFERRED SUITE	PREFERRED FLOOR PLAN	ALTERNATE FLOOR PLANS	PREFERRED LOCATION			
New Wait List (highlighted with red arrow)						
Wait List Management (+)						
CANCEL	PREFERRED SUITE	PREFERRED SUITE TYPE	PREFERRED MOVE-IN DATE	STATUS	WAIT LIST TYPE	WAIT LIST DATE
Resident Transactions (+)						
REFUND	POSTING DATE	AMOUNT	DEPOSIT TYPE	PAYMENT TYPE	TRANSACTION TYPE	BANK DEPOSIT

- 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**

- 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**



The screenshot shows the 'New Wait List' form with the following fields and values:

- My Community:** RHS Sample Community
- Wait List Type:** Wait List
- WL Description:** (empty)
- WL Date:** 05/04/2016
- Anticipated Move-in Date:** (empty)
- Preferred Suite:** (empty)
- Preferred Floor Plan:** 1 Bedroom
- Alternate Floor Plans:**
 - Available:** 1 Bedroom, 2 Bedroom, Penthouse
 - Chosen:** Studio
- Preferred Location:**
 - Available:** Tower
 - Chosen:** River View
- WL Deposit Amount:** 500
- Deposit Type:** Priority Deposit
- Deposit Date:** 05/04/2016
- Payment Type:** Cash
- Document No.:** (empty)
- WL Number:** (empty)

Buttons at the bottom: Close, 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**

Create and Manage Wait Lists

Wait List Management (1)

WAIT LIST ID	STATUS	COMMENTS	WAIT LIST DATE
Tishler, Gabriella (Eric & Angelina)	Waiting		4/11/2016

[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**

Donaldson, Feryn (Feryn Donaldson) [+ Follow](#) [Edit](#)

Preferred Location: Available Tower | Chosen River View

Wait List Type: Wait List

Wait List Date: 5/4/2016 [5/10/2018]

Update Preferences

Offering Status

Status: **Waiting** (dropdown menu open showing: --None--, Waiting, Offered, Confirmed, Cancelled, Completed)

Status Date:

Created By: Neomi Tsekhman, 5/10/2016 2:19 PM

Last Modified By: Neomi Tsekhman, 5/10/2016 2:19 PM

[Cancel](#) [Save](#)

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

1	Wait List Date	9/6/2015
	Spouses Name	
	CityStateZip	
	Address	
	Phone	5558889
	Wait List Type	Wait List
	Wait List Number	
tus		
	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 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

Create and Manage Wait Lists

- 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**

PROSPECT > WAIT LIST MANAGEMENT
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Status: **Wait List** Prospect Status: **OK - High Interest (within 30 days)**

[New Wait List](#)

NEW CANCEL

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	4/11/2016

Resident Transactions +

REFUND	POSTING DATE	AMOUNT	DEPOSIT TYPE	PAYMENT TYPE	TRANSACTION TYPE	BANK DEPOSIT
<input type="checkbox"/>	4/11/2016	\$500.00	Priority Deposit	Check	Payment	

Prospect Information

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

New Prospect Status

02 - Some Interest (within 1 yr) v

My Community

RHS Sample Community v

WL Number

New Status

Lost v

Wait List Type

None v

WL Date

Cancellation Reason Code (Required)

Went to competitor v

Close Prospect File Information

Reason Code (Required)

Did not like building amenities v

Reason For Loss Notes

Competitor

Mr. Steazy Seniors Paradise v

Destination

Moving to a competitor Assisted Living facility v

Date Closed

4/21/2016 v

[4/21/2016]

[Cancel/Refund and Update Prospect](#)