

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.

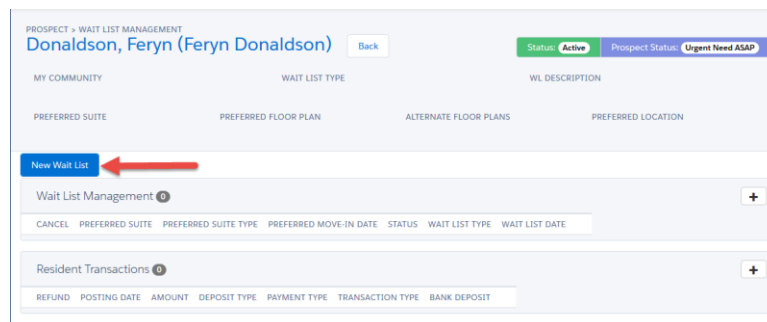
Step by Step

Create Wait List

The system will:

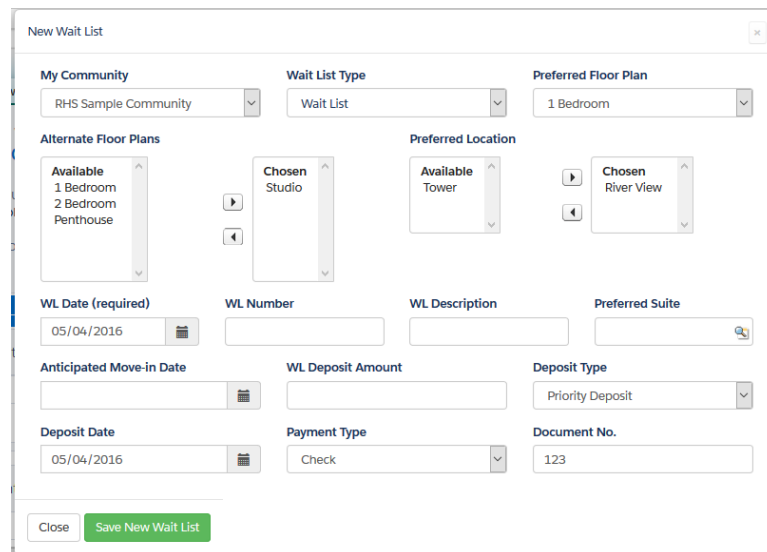
-  Create a wait list entry on the “Wait List Management” list related to a prospect File
-  Create a Resident Transaction if a deposit is recorded
-  Change the Status on the prospect file to *Wait List*
-  Record wait list information on the prospect profile page if your organization is configured 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** Select a **Preferred Floor Plan**
- 7** Select **Alternate Floor Plans**
- 8** Select a **Preferred Location** if applicable

- 9 Specify **WL Date**
- 10 Enter a **WL Number** if applicable
- 11 Enter an optional **WL Description**
- 12 Specify **Preferred Suite** if the prospect is waiting for a particular suite
- 13 Specify an optional **Anticipated Move-In Date**
- 14 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.
- 15 Select **Deposit Type**
- 16 Specify **Deposit Date**
- 17 Select **Payment Type**
- 18 Enter a **Document No.** to record a cheque/check 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
- Preferred Floor Plan:** 1 Bedroom
- Alternate Floor Plans:** Available (1 Bedroom, 2 Bedroom, Penthouse), Chosen (Studio)
- Preferred Location:** Available (Tower), Chosen (River View)
- WL Date (required):** 05/04/2016
- WL Number:** (empty)
- WL Description:** (empty)
- Preferred Suite:** (empty)
- Anticipated Move-in Date:** (empty)
- WL Deposit Amount:** (empty)
- Deposit Type:** Priority Deposit
- Deposit Date:** 05/04/2016
- Payment Type:** Check
- Document No.:** 123

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
Tishler, Gabriella (Eric & Angelina) Back 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

My Community

WL Number

New Status

Wait List Type

WL Date

Cancellation Reason Code (Required)

Close Prospect File Information

Reason Code (Required)

Reason For Loss Notes

Competitor

Destination

Date Closed

[Cancel/Refund and Update Prospect](#)