





How to Manage Temporary Suite Holds

Description

Use this function to place a temporary hold on a suite. This is generally done when the prospect has indicated that they will put a deposit on a suite, but before they have had a chance to bring the deposit payment.

The system will:

-  Create a **suite hold** record on the suite file
-  Record the hold information on the suite file
-  Allow the sales counselor to link the hold to a prospect file
-  Allow the sales counselor to input hold deposit information to be recorded on the prospect file

Step by Step

Place a Suite on Hold

- 1 Click on the **Hold a Suite** link in your left-hand sidebar



Quick Links

Hold a Suite

- 2 Enter a **Suite ID**
- 3 Enter a **Hold For** name. Note that this does not automatically link the hold to the prospect's file, but rather allows for quick on-the-go entry.
- 4 Select a **Hold Owner**
- 5 Specify a **Hold Date**. If no date is entered, the **Hold Date** will default to today's date.
- 6 Click **Request Hold**

Please Select Suite to Hold

Suite ID*

Hold For

Hold Owner

Hold Date

*- required

Request Hold

Link the Suite Hold to a Prospect & Record Deposit Information

- 7** Navigate to the suite record
- 8** Click **Confirm Hold**
- 9** Specify a **Hold Prospect** from your prospect database to match the **Hold For** name
- 10** Enter an optional **Hold Comment**
- 11** Enter a **Deposit Amount**
- 12** Specify a **Deposit Date**
- 13** Select a **Payment Type**
- 14** Enter a **Document No.** if applicable
- 15** Click **Save**

SUITE > HOLD
610 [Back](#)

Model Suite Type: Suite Status: **Available**

COMMUNITY: iaRetirement - GTA SUITE TYPE: MODEL:

Hold-00043 Suite Hold Information Resident Transactions: **0**

Status On Hold **Hold Date** 6/15/2016 8:16 AM

Hold For **Hold Prospect** Required to create Resident Transaction

Hold Comment

Create Resident Transaction (Optional)

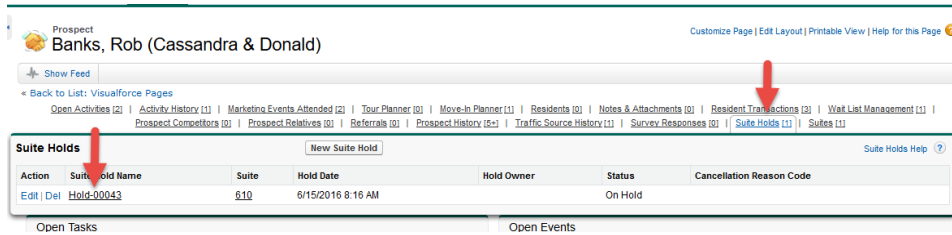
Deposit Amount Required **Deposit Date** Required **Deposit Type** Holding

Payment Type Required **Document No.**

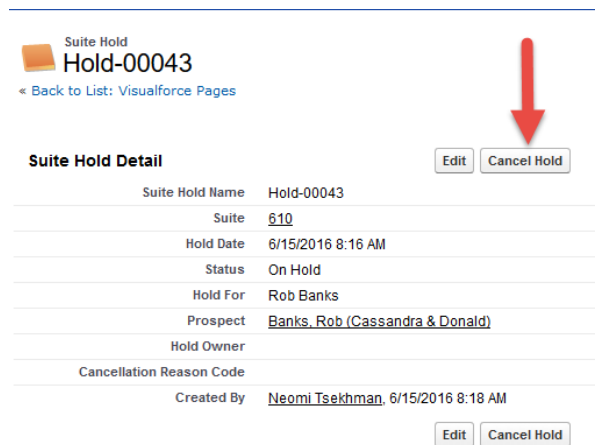
Save

Cancel a Suite Hold

- 1 Navigate to the prospect's profile page
- 2 In the "baby words" at the top of the page, hover over **Suite Holds**
- 3 Click the **Suite Hold Name**



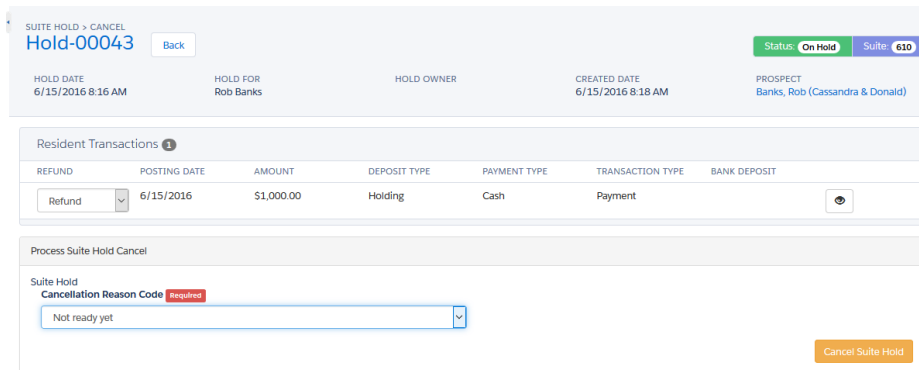
4 Click Cancel Hold



5 Select a Refund option of Refund, Returned, or Shredded

6 Select a Cancellation Reason Code


7 Click Cancel Suite Hold



NOTE: If a suite hold needs to be cancelled *before* a prospect is linked to the suite hold record, simply delete the **Hold For** name on the suite record

Suite Detail Save Cancel

▼ General

Suite ID	610	Default Lease Type	Guest
Suite Type		Model	Studio
Model Name		Model Suite Type	
Community	iaRetirement - GTS	Floor	6
Market Ready	<input type="checkbox"/>	Room Activity Notes	
Suite Status	Available	Visiting Resident	
Suite Configuration		Condo Fee	
Date Available		Investor	
x2 Group		Lifestyle Program	
Renovation Contract Date		Hold For	Bob Bess
Date Vacant		Hold Owner	
Last Bill End Date		Hold Date	
Available to Show	<input type="checkbox"/>	Hold Prospect	
Available to Show Comment		Hold Comment	
Availability			

Delete