

How to Enter and Maintain Reservation Options




Description

Use this function on the Wait List Management module to track reservation options for prospects who have an existing move-in planner, but who are waiting for another suite to become available.

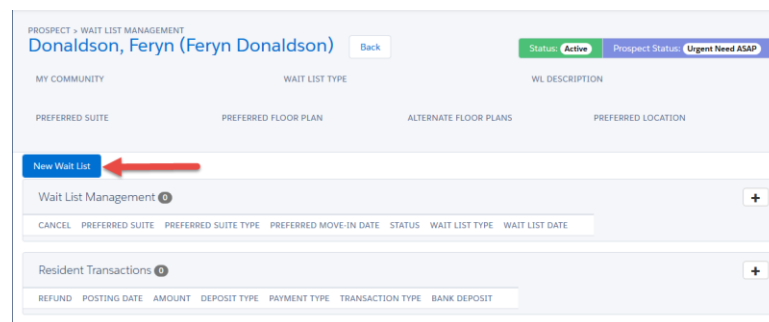
Step by Step

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*

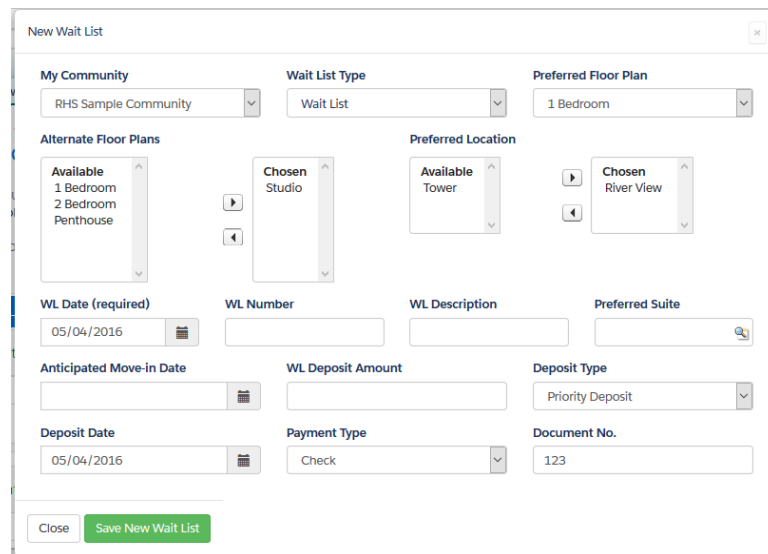
- 1** Navigate to the prospect’s profile
- 2** Click **Wait List Management**
- 3** Click **New Wait List**



- 4** Select a new **Prospect Status**
- 5** Select **My Community** if applicable
- 6** Select **Wait List Type of Reservation Options**
- 7** Select a **Preferred Floor Plan**
- 8** Select **Alternate Floor Plans**
- 9** Select a **Preferred Location** if applicable
- 10** Specify **WL Date**
- 11** Enter a **WL Number** if applicable

Create and Manage Wait Lists

- 12** Enter an optional **WL Description**
- 13** Specify **Preferred Suite** if the prospect is waiting for a particular suite
- 14** Specify an optional **Anticipated Move-In Date**
- 15** 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.
- 16** Select **Deposit Type**
- 17** Specify **Deposit Date**
- 18** Select **Payment Type**
- 19** Enter a **Document No.** to record a cheque/check number if applicable
- 20** Click **Save New Wait List**



The screenshot shows a '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

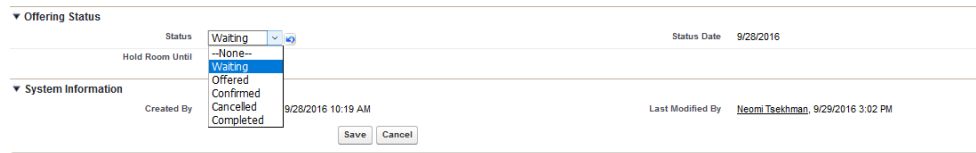
Manage Wait List

- 1** Navigate to the Prospect’s profile
- 2** In the baby words at the top of the page, hover over **Wait List Management**
- 3** Click on the **Wait List ID**
- 4** Scroll down to the “Offering Status” section and 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



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	
<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 **Wait List Management**
- 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**

Create and Manage Wait Lists

- 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**

PROSPECT > WAIT LIST MANAGEMENT
Tishler, Gabriella (Eric & Angelina) Back

Status: Wait List Prospect Status: 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)

My Community
RHS 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.Sleazy Seniors Paradise

Destination
Moving to a competitor Assisted Living facility

Date Closed
[4/21/2016]
[4/21/2016]

Cancel/Refund and Update Prospect