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.

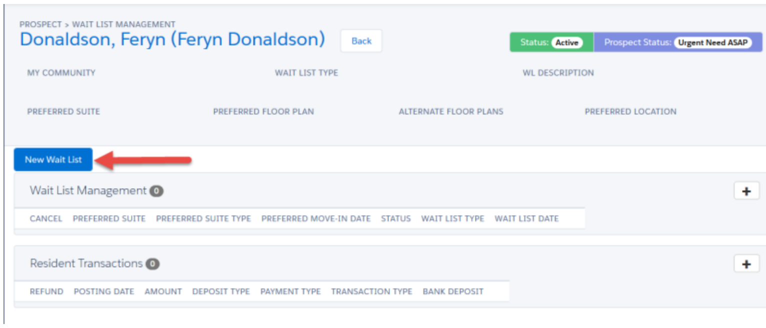
Step by Step

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

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.

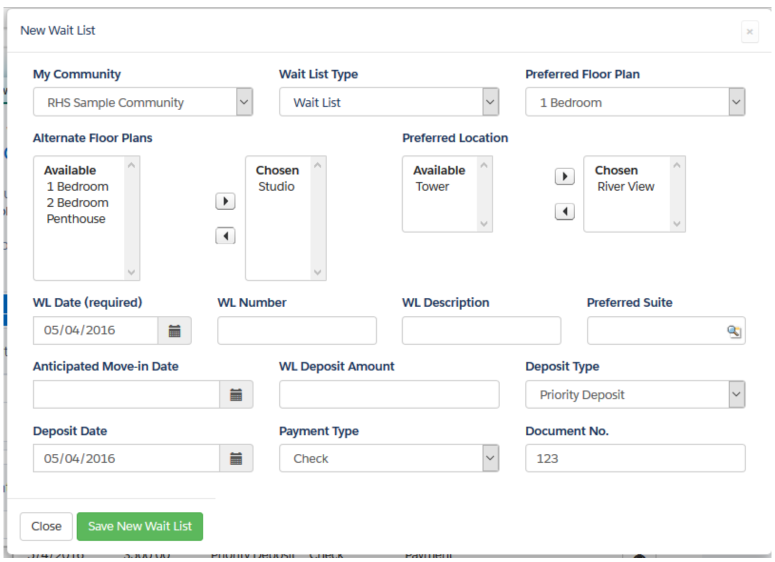
16 Select **Deposit Type**

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**



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**

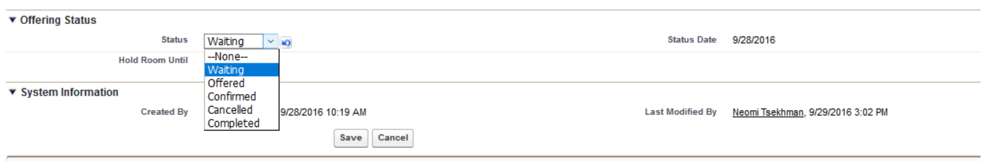
3 Click on the **Wait List ID**

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**

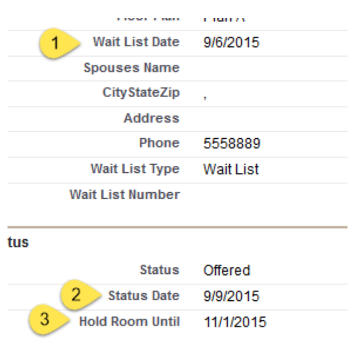


Dates:

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



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**

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**