This manual covers entering new Prospects, converting Prospects to Residents, and converting Residents back to Prospects.

To access click the Prospects & Related Parties icon on the Market Minder home screen or click Contact Mgmt—Prospects.

The Prospect listing screen will open.

Prospects are the second stage of the marketing process. They are qualified and closer to moving in than an Inquiry. This area of Market Minder also holds history of current and past residents. Here you can enter communications for your Prospects, reserve their unit, move them in, and more.
To enter a new prospect, click the ‘New’ button in the bottom left corner of the screen. To open an existing Prospect, double click his or her name.

Market Minder has filters to help you find who you are looking for.

**Active Only**: Checking this box limits the list to only Prospects that are active. Current residents are not active; neither are prospects that you have marked inactive.

**Only Prospects for <your name>**: Limits the list to Prospects that the employee currently logged in is working with. The Prospect Status tab has a Source field. If your name is in this field, you will see the prospect when this box is checked.

![Source filter example](image)

**Find field**: To find a Prospect, type a portion of their first or last name into the Find field. Do not press the enter key on your keyboard, just let the system perform the search.

The Find field also has an arrow to allow you to find active prospects who you don’t have a communication scheduled for, potential duplicate prospects (‘Dups’), active prospects who have given you a deposit for today, or active prospects from lead interfaces.

If the system finds a potential duplicate, you can do one of two things:

If the duplicate is the same person and has been entered into the system twice, merge the two records into one by highlighting both names, clicking ‘More’ and selecting ‘Merge Prospect.’ To highlight the records, simply click on each of them while holding the ‘Ctrl’ key on the keyboard.

Note: The ability to merge prospects is based on employee access.
If the prospects who are showing up as duplicates are NOT the same person, double click the Prospect in the list to open his or her record and check the ‘Accepted Duplicate’ box.

Community: If this is a multi-community database and you have access to more than one community, you can use the community filter to look at just prospects for one community within the database.

Prospect Status Filter: This option allows you to view only prospects with a certain status in the move-in process. Click on the status you would like to see.

Prospect Data:
Prospect records are more detailed than Inquiry records. Each prospect’s record has the following tabs: Main, Demographics, Communications, Prospect Status, and Resident Status.
**Main Tab:** Each of these fields can be tabbed through, using the tab key on your keyboard.

**Salutation/Suffix:** Select the salutation or suffix from the list using the blue drop down arrow. If you have access to modify choice lists, you will see Edit This List. Clicking this allows you to add a salutation or suffix to the list of options.

**Name and Address Fields:** Enter the information that you have for this prospect. None of these fields are required if you did not collect all the information. The first letter of each field and the first letter after a space will automatically capitalize when you move to the next field.
Preferred Name: If the prospect has a nickname, enter it here. If they go by their first name, leave the Preferred Name field blank. This will print their name as Robert “Bob” Hoffman.

Do Not Contact Prospect: If you are only communicating with the Prospect’s Related Party and should not be communicating with the Prospect at all, check this box.

Relationship: This area links two Prospects together, if they are related in any way. For example, if a husband and wife were both moving in to the same unit, you can link them together by clicking ‘Create Related Prospect’.

Creating a related prospect will open a new prospect window. When you are adding a married couple, each person needs their own prospect record. In the new prospect window, you will need to edit the salutation, add the first and middle name, and preferred name. If you have entered the address and contact information for the original prospect, it will copy over to the new, related prospect saving you time. The 2nd Occupant box will also be checked, denoting they will live in the same room and share a rent fee.

If you click ‘Link to an existing Prospect as a Related Prospect,’ a list containing all the prospects will open. Double click on the name you would like to link to this prospect.

When you tie two prospects together, you will see Edit Related Prospect with a drop-down arrow. If you click the arrow, you see Edit Related Prospect or Dis-associate from Related Prospect. Select ‘Dis-associate from Related Prospect’ if the prospects were linked in error. Click ‘Edit Related Prospect’ to open his or her related prospect’s record.

Referral Source: Use the look up at the end of the field to choose a referral source for this prospect. If you know the name of the referral source, you can also type it in this field. There is also a category column and a filter for Referral Source Category.

If the referral source you are looking for is not on the list, click the ‘Modify’ button. This will take you directly to the Referral Source page. Click ‘New’ to add the referral source. Add the referral source, click ‘Save,’ then ‘Done’ and you
will be back on the prospect record. See the *MMCh02: Contacts & Referral Sources* manual for more details on adding a referral source.

Note: The Modify button will be available to employees with access to modify Referral Sources.

**Senior Linkage #/Preadmission #**: Enter the prospect's Senior Linkage Number. For communities in states other than Minnesota, this field is titled Pre-Admission #.

The field can be required in order to convert a prospect to a resident. To enable, open File—Setup—Community—Marketing tab.

Note: The company has the option to hide the Pre-Admission number on Inquiry and Prospect records. This can be selected by going to File-Setup-Company-Marketing General tab.

**Phone number**: To add a phone number, click on any unused line and select a type from the list. Tab and enter the phone number. Phone numbers will format when you click out of the field.

If you enter seven digits, it will format as ####-####. If you enter 10 digits, it will format as (###) ####-#####. If the phone number has an extension, enter ‘x’ prior to the extension number.

Example:

Formats to:

**E-Mail Address**: To add an email address, click on any unused line and select a type from the list. Enter the email address.

**Related Party**: The middle section of the prospect screen is for the Prospect’s related party. This is a person helping the Prospect find a place to live. Commonly they are a friend or relative of the Prospect. When the prospect is copied to Service Minder, the Related Party will become the primary contact.
**Additional Contacts:** This section is for additional contacts or related parties for the Prospect. To add an additional contact, click the green ‘Add’ button.

<table>
<thead>
<tr>
<th>Additional Contacts</th>
<th>First Name</th>
<th>Last Name</th>
<th>Phone 1</th>
<th>Phone 2</th>
<th>Relationship</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anna</td>
<td>Olson</td>
<td>Home (555) 444-1124</td>
<td></td>
<td>Daughter</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

To open a contact’s record, double click on his or her name, or highlight their name and click ‘Open.’ To delete an additional contact, highlight their name and click ‘Del.’ These contacts can also be ranked in order of their priority.

When adding an additional contact, enter the information in the appropriate fields. Contacts will transfer into Service Minder when the prospect becomes a resident.

Click on ‘Save’ to return to the prospect record, or ‘Add Another’ if you have another contact to add.

**Demographics Tab**

This tab includes several choice lists to enter basic information about the Prospect. The bottom half of the screen is a large, open text field designated for any additional notes. These notes will not show up on any reports, nor will they transfer over to Service Minder when the prospect moves in.
**Birth Date:** Enter the Prospect’s birthday and the software will calculate the age for you. You cannot enter anything in the Age field, it must populate from the Birth Date field. This ensures their age is accurate.

For the rest of the fields on the Demographics tab, click the blue arrow next to the field to display a list of choices. If you have access to edit choice lists, you will see Edit This List at the bottom of the list.

![Choice List]

When the choice you are looking for is not listed, click ‘Edit This List,’ add your desired answer to the list, then click ‘Save.’ This answer will now be available for everyone using Market Minder.

**Communications Tab**

On this tab, you can record past communications and schedule future communications. It is normal for multiple employees at your community to have communications for the same prospect. If any communications were recorded for the Prospect while in the Inquiry stage, they will copy over to the Prospect communication tab when the Inquiry converts to a Prospect.

For information on recording communications, please reference *MMCh07Communications*. Enter communications in the same way for Inquiries, Prospects, and Referral Sources.

**Prospect Status Tab**

The Prospect Status tab holds several important pieces of information about the Prospect. As information is completed on this tab, the system will update the Prospect’s status, in the upper right corner. This status will also display in the first column of the Prospect listing screen.
Prospect Ownership and Referral Source:

Employee: The employee listed in this field owns this Prospect and is responsible for maintaining this record. This will default to the employee logged in when the Prospect is added but can be changed if your Company settings and employee access allows.

Referral Source: Select the Referral Source that should get credit for this Prospect. If this is completed on the Main tab, it will also be completed on the Prospect Status tab.

Community: When an Inquiry is converted to a Prospect, the Community will be populated with the Community on the Inquiry record. When a new Prospect is added, the Community will be populated with the Default Community assigned to the person logged in. All Communities that the current user has access to will be displayed in the dropdown.

Note: When Allow Reassignment to a Community the Employee does not have access to is enabled, the list of Communities will include all active Communities with the Market Minder Module enabled.

Prospect Status:

Date Became Prospect: This is the date that you converted the Inquiry to a Prospect, or the date that you entered the individual as a new Prospect.

Interest Level: All Prospects entered in the system will default to warm. Their status will display simply as Prospect. Change the Prospect’s Interest Level using the drop-down menu. Remember, you can modify the Interest Level list under File Menu – Setup – Interest Level. For more information, refer to the MM Ch01 Setup manual.

Qualified: Check this box if the Prospect is qualified, according to your community standards, to move into your community.

Lost Prospect: If the Prospect is no longer interested in moving in, select a reason for losing them here and the individual will drop off your active prospect list. The Date field will populate today’s date, but you can adjust the date they were lost if necessary.

If you fill out a Lost Prospect Reason in error, simply remove the date lost and the reason. His or Her status will return to active.

Waiting List: You can place a Prospect on the Waiting List for up to three different unit types. If you work in a multi-community database, you have the option to place the Prospect on the Waiting List for another community that you have access to. Fill out the Community and Preferred Unit Type fields for up to three combinations. If the Prospect moves into his or her 2nd or 3rd preference, you have the option to keep them on the waiting list until their 1st preference...
becomes available.

<table>
<thead>
<tr>
<th>Waiting List</th>
<th>1st preference</th>
<th>2nd preference</th>
<th>3rd preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community</td>
<td>Minnesota Assisted Living</td>
<td>Florida Assisted Living</td>
<td></td>
</tr>
<tr>
<td>Preferred Unit Type</td>
<td>Private 1 bedroom + den</td>
<td>One Bedroom + Den</td>
<td></td>
</tr>
</tbody>
</table>

To remove someone from the waiting list, delete the Community and Waiting List Preferred Unit Type information.

**Priority:** You can rank Prospects by move in priority. The lower the number, the higher they rank on your priority list. You can sort your Wait List by priority and use this criterion to determine which Prospect to move in when a unit becomes available. You can enter multiple Prospects with the same priority number if you wish.

**Waiting List Notes:** Use this to type in any details about the Prospect preferences, for instance, maybe the individual prefers the first floor.

**Cancel Date:** Enter a date in this field to cancel their waiting list reservation.

**Cancel Reason:** Select a cancellation reason from the drop down list.

**Deposit:**
If you have received a deposit, enter the date you received it here. Note: If you wish, you can opt to require a deposit date before you are able to place a Prospect on your Waiting List. This set up is under Files-Setup-Community-Marketing Tab.

**Unit Reservation:**
When a unit becomes available, to reserve the unit for the Prospect, check the ‘Unit Reserved’ box. Doing so will change the status of the prospect from On Wait List to Unit Reserved.

**Reserved from:** Enter the date you would like to start holding the specific unit.

**Reserved To:** Enter the date that you are willing to hold the unit through. After the date has passed, the unit will become available to others.

**Community:** Before you select a unit, select the community that the Prospect is moving into.

**Unit:** Select the desired unit. First click the lookup icon; a list of units will open. On the right had side, choose which list of units you would like to see. The units displayed vary based on the list you select. You can view all units, open units, units that match the Prospect’s wait list preferences, or open units that match the Prospect’s wait list preferences.
The Unit ID column lists the unit number. The Type column lists the unit types. The Status column will list whether the unit is occupied, reserved, or open (column will be blank if the room is open). Finally, the Name column lists the name of the Resident or Prospect with the unit reserved.

Sort by any of these columns by clicking the column header.

The system gives you the ability to print the Unit list with the Print button. Double click on the unit that the Prospect will be moving into, or highlight the unit line and click ‘Select.’

**Move In**

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Rental Agreement</th>
<th>Assessment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>12:00 AM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Move in Date/Time:** Enter their scheduled move in date and time in these fields.

**Rental Agreement:** When the Prospect signs the Rental Agreement, enter the date here. This signifies a sale.

**Assessment Date:** If you are scheduling an assessment prior to move in, you can enter the date here. If an assessment is completed in Service Minder prior to move in, the date will appear here.

**Convert to Resident:** On the scheduled move in date, you are prompted to Convert the Prospect to Resident. If the move in date has passed, you are also prompted. If you would like to move the Prospect in to your community before the move in date, click the ‘Convert to Resident’ button at the bottom of the Prospect Status tab. This button disappears from the screen once a Prospect is converted to a Resident.
If the Prospect is moving into a unit that is not their 1st preference you will receive this message. Click ‘Yes’ if you would like to keep them on the waiting list for their preferred unit type, and the Prospect will stay active in Market Minder until their preferred unit type becomes available.

This alert will appear when the conversion is successful.

If your community has the ‘Require Senior Linkage/Pre-Admission # on Convert to Resident’ turned on than a check will be ran. If the number is not already entered on the prospect record, the following prompt will be displayed.
Select ‘Cancel’ to return to the Prospect Status tab or enter the number and select ‘OK’.

When a Prospect is converted to a Resident, waiting list reservations are removed unless you choose to keep them on the waiting list for their preference. The Prospect Status tab is cleared out and disabled, and most of the information stored on this tab will move to the Resident Status tab.

Resident Status Tab
For any community that uses Market Minder with Service Minder and/or EMAR, all census changes need to be made in Service Minder or EMAR. For any community that uses Market Minder only, all census changes need to be made in Market Minder by clicking on the green plus sign.
Stop Synchronization from Resident: Remain unchecked if your community uses Service Minder.

Add Resident to Unit Waiting List: Select to add a current resident to the waiting list.

Unit Reservation for Current Resident: Select to add a unit reservation for a current resident.

If the resident is not on the Waiting List, click ‘Add Unit Reservation’ button on the Resident Status tab.

The Prospect Status tab will open with the Unit Reservation fields available.
Enter the Unit Reservation information for the resident.

The required fields to save are the same as when adding a Unit Reservation to a prospect.

**Reserve Unit for a Current Resident on the Waiting List**: The Add Unit Reservation button is also available on the Prospect Status when a Current Resident is on the Wait List.
Once Unit Reservation information is entered, the Add Unit Reservation button is removed from the Prospect Status and/or Resident Status tabs. The Prospect Status will change to Unit Reserved.

If the resident does not transfer to the new unit on or before the Unit Reservation To Date, the fields become disabled. The Add Unit Reservation button becomes available again on the Prospect Status and/or Resident Status tab. Click to enable the fields for editing.
When the resident is transferred to the new unit in Service Minder, the Unit Reservation information is cleared from the Prospect Status tab.

Note: The Wait List Report includes active Prospects with Waiting List and Unit Reservation information. See Marketing Report Waiting List manual for more information.

**Unit History:** This is the history of the unit(s) this resident has occupied or currently occupies. Accurate unit history is needed for all census and marketing reports with unit occupancy information in Service Minder and Market Minder.

**Move In:** The first day the resident is responsible for rent charges in the unit.

**Move Out:** The last day the resident is responsible for rent charges in the unit.
**Unit Transfer In / Unit Transfer Out:** To transfer the resident to a new unit, click on ‘Add’. Select the unit from the list. If the unit is not shown, click on the ‘All Units’ tab. Enter the Move In date for the new unit. The Move Out date on the previous Unit History line will be filled in as the day prior to the new Move In date. This date can be edited. The check boxes for the Transfer In and Transfer Out will also be completed.

Note: When a resident is paying for 2 units at the same time, you will need to remove the check boxes from the new unit Move In-Transfer and the other unit Move Out-Transfer.

**2nd Occupant:** If the resident is living with another resident who is responsible for the rent, mark the ‘2nd Occ’ box on that row of unit history.

**Notice Given:** If a resident has notified the community of a plan to move out, enter the Notice Given date on that row of unit history.

If your community is using Service Minder, you will not be able to edit any unit history in Market Minder. Updates must be done in Service Minder, which will automatically update the Resident Status tab in Market Minder.

When a Prospect is converted to a Resident, the Unit Reserved and Move-in information from the Prospect Status tab transfers to the Resident Status tab. It is stored below the Unit History. Fields with a white background are editable.

**Admission / Discharge:**

```
<table>
<thead>
<tr>
<th>Admit Date / Time</th>
<th>Deposit</th>
<th>Discharge Date / Time</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/24/18</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/20/18</td>
<td></td>
<td>09/24/18</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assessment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

**Pay Source History:** This information is also shared with Service Minder but can be updated in either Market Minder or Service Minder. The Pay Source is for the resident’s primary pay type. It populates to a few of the marketing reports.

**Discharging a Resident**

If your community uses Service Minder, the discharge MUST be entered in Service Minder. You will not be able to enter it here. The following instructions are for communities using ONLY Market Minder.
**Move Out Date:** Enter the date the resident left the community. If this is a scheduled move out, you can enter a future date into this field. The status of the Resident’s record will change to Moving Out. Once the move out date has occurred, the Resident status will be Moved Out.

**Discharge Date / Time:** Enter the correct date and time of discharge.

**Reason:** Click the lookup to see a list of reasons to choose from.

Note: If a resident is moving from one unit to another, click the green ‘Add’ button. If you are a multi-community database, you will need to select the community. Next, you will select the correct unit from list.

Once the correct unit is selected, the resident will have a new line to his/her Unit History. Enter Move Out date for the prior unit and the Move In date for the new unit. The resident’s status will remain Current Resident.

**Unit History**

**Converting A Resident Record Back to A Prospect Record**

If a prospect is converted to a resident but does not move in, there is an option to convert the resident record back to a prospect record.

This option will only be available to those employees who have been granted access through employee setup.
Access is found under the More Options dropdown under Resident.

To utilize this feature, use the More button on the Resident listing screen.

Select ‘Convert Resident back to Prospect’.

Note: A resident must be selected. If a resident is not selected and Convert Resident back to Prospect is selected this prompt will be shown:
If more than one resident record is selected, the following alert message will be shown:

![Alert](image)

A resident record cannot be converted back to a Prospect record if the resident record has any of these related records: Census Days Transactions, Med Delivery with User Recording, Payment, Security Deposit Transaction, Service Archive, Service Received, Statement, Transactions

The following alert message will be shown if the resident record has related records:

![Alert](image)

The Resident’s record can be converted back to a Prospect record and then deleted even if the record has any of these related records: Med Delivery with No User Recording, Resident Notes, Payor Communication, Resident Immunization, Medication Incident, Resident Incident/Accident, Resident Vitals, Service Scheduled, Resident LOA, Service Plan, Resident Medication, Resident Diagnoses, Resident Allergies, Resident Monthly Recurring Transactions

The following warning message is shown in this case:

![Confirm](image)

Click ‘Proceed’ and the resident record and associated records will be deleted.

Note: If a payor was created and the payor record is only tied to one resident record, then the payor record will also be deleted. If the payor record is tied to multiple residents it will not be deleted.
If the resident record has an assessment complete the resident can still be converted to Prospects and then deleted.

Assessments will be copied to the related Prospect record in this case (Person Type will be updated to Prospect and the Resident Number will be removed).

The following alert message will be shown in this case:

If a Resident record was manually added and not created by converting a prospect record to a resident record, the system is to create a new prospect record. The system will automatically populate a Prospect ID and the Date Became Prospect date will be entered as the current date.

The following values are to be copied from the Resident to the Prospect record when the resident record is deleted: Salutation, First Name, Middle Name, Last Name, Suffix Name, Birth Date, Gender, Marital Status, Previous Occupation, Home Phone, Other Phone, Race, Primary Language, Previous Address

Note: If later the Prospect is converted back to a Resident the system will generate a new Resident ID.