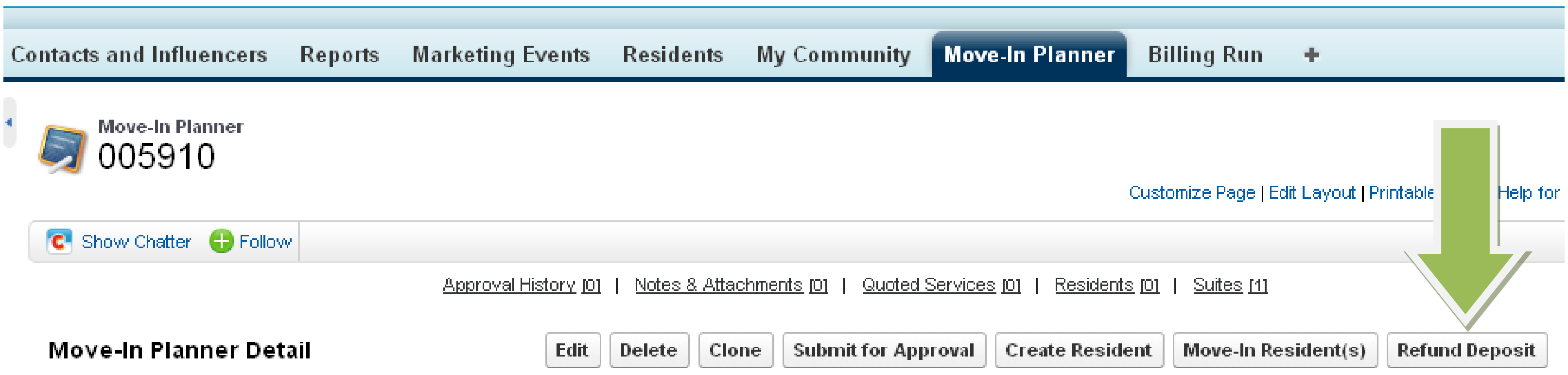
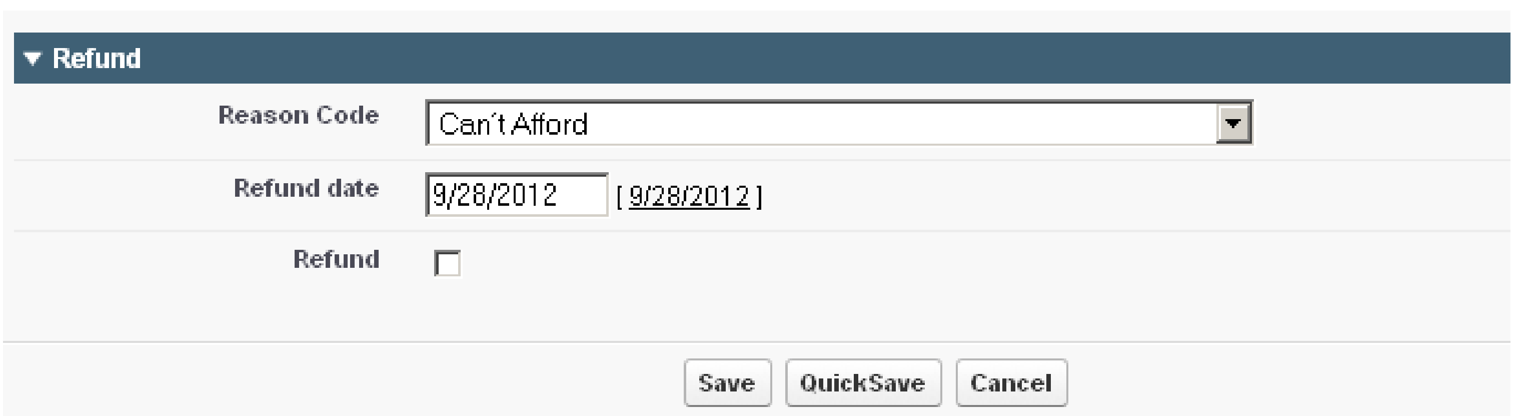
How to Refund a Prospect That Has Made a Deposit

Sometimes you may have to issue a refund for a deposit that has been created through a move in planner. In order for this to go through correctly in your system and on the reports, you must use the Refund button.

Navigate to the move-in planner that is connected to the prospect that requires a deposit. Along the top there will be a button called Refund Deposit. Click it.



On the next screen, make sure all the information is correct.



Choose a reason code, the date of the refund, and check the Refund checkbox. Save.

What this button did is credit the exact amount of the refund that was on that move-in planner. If the resident was moved-in already, this will not work. To make sure everything went well, head back to their original Prospect file.

The system will update the original prospect, close the Move-In Planner & create a new Resident Transaction offsetting any previous unapplied deposits (across all his/her Move-In Planners).

Open Activities [3] | Activity History [3] | Marketing Events Attended [0] | Tour Planner [1] | Move-In Planner [1] | Notes & Attachments [0] | Resident Transactions [2] |

Resident Transactions New Resident Transactions Resident Transactions H

Action	Description	Resident Name	Resident ID	Amount	Community ID	Audit No.
Edit | Del				$500.00	iaRetirement - GTA	4180
Edit | Del				-$500.00	iaRetirement - GTA	4682