How to Take an Additional Deposit

Description

Use this function to record Resident deposits that are broken up into several installments.

Step by Step

1 Navigate to the Prospect's record page

2 In the baby words at the top of the page, hover over Resident Transactions

3 Click **New Resident Transactions**

4 Confirm the **Prospect's Name**

5 Specify a **Community**

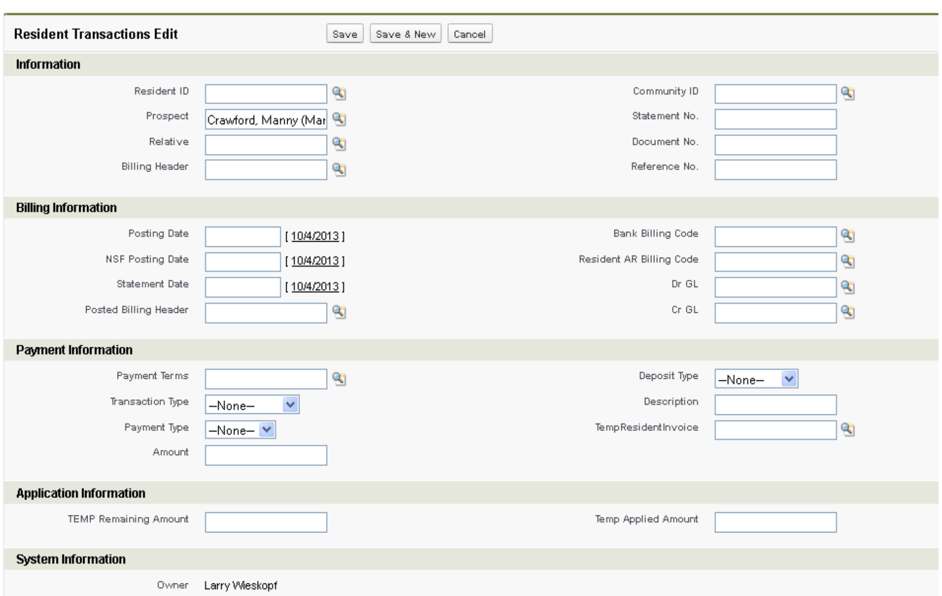
6 Specify a **Posting Date**

7 Select *Payment* as the **Transaction Type**

8 Select a **Payment Type**

9 Click **Save**

Note: If a Resident was already created from the Prospect's Move-In Planner, additional deposits **must** be done from the **Resident's** page, in the same process as outlined for the Prospect.



Updated: October 4, 2013