

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.

Resident Transactions Edit		Save	Save & New	Cancel
Information				
Resident ID	<input type="text"/>	Community ID	<input type="text"/>	
Prospect	Crawford, Manny (Mar)	Statement No.	<input type="text"/>	
Relative	<input type="text"/>	Document No.	<input type="text"/>	
Billing Header	<input type="text"/>	Reference No.	<input type="text"/>	
Billing Information				
Posting Date	<input type="text"/> [10/4/2013]	Bank Billing Code	<input type="text"/>	
NSF Posting Date	<input type="text"/> [10/4/2013]	Resident AR Billing Code	<input type="text"/>	
Statement Date	<input type="text"/> [10/4/2013]	Dr GL	<input type="text"/>	
Posted Billing Header	<input type="text"/>	Cr GL	<input type="text"/>	
Payment Information				
Payment Terms	<input type="text"/>	Deposit Type	--None--	
Transaction Type	--None--	Description	<input type="text"/>	
Payment Type	--None--	Temp Resident Invoice	<input type="text"/>	
Amount	<input type="text"/>			
Application Information				
TEMP Remaining Amount	<input type="text"/>		Temp Applied Amount	<input type="text"/>
System Information				
Owner	Larry Wleskopf			