# How to Manage Temporary Suite Holds

## Description

Use this function to place a temporary hold on a suite. This is generally done when the prospect has indicated that they will put a deposit on a suite, but before they have had a chance to bring the deposit payment.

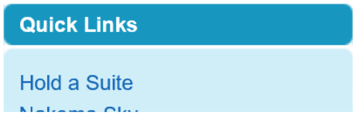
The system will:

- Create a **suite hold** record on the suite file
- Record the hold information on the suite file
- Allow the sales counselor to link the hold to a prospect file
- Allow the sales counselor to input hold deposit information to be recorded on the prospect file

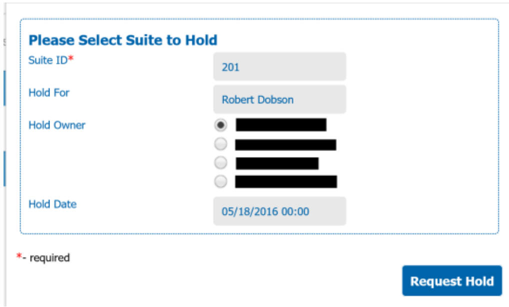
## Step by Step

### Place a Suite on Hold

1. Click on the **Hold a Suite** link in your left-hand sidebar




2. Enter a **Suite ID**
3. Enter a **Hold For** name. Note that this does not automatically link the hold to the prospect's file, but rather allows for quick on-the-go entry.
4. Select a **Hold Owner**
5. Specify a **Hold Date.** If no date is entered, the **Hold Date** will default to today's date.
6. Click **Request Hold**




## Link the Suite Hold to a Prospect & Record Deposit Information

**7** Navigate to the suite record

**8** Click **Confirm Hold**

**9** Specify a **Hold Prospect** from your prospect database to match the **Hold For** name

**10** Enter an optional **Hold Comment**

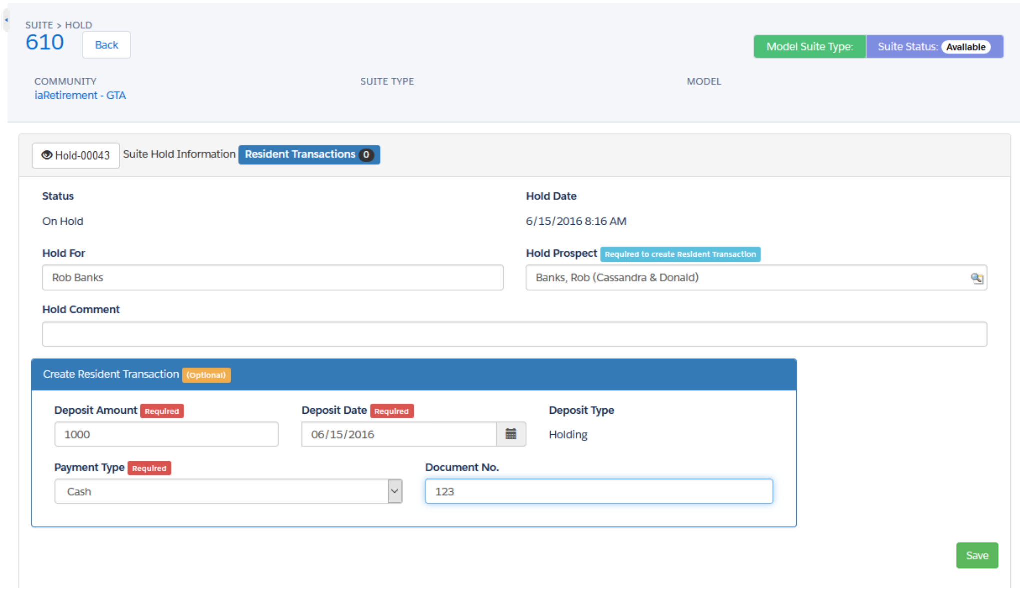
**11** Enter a **Deposit Amount**

**12** Specify a **Deposit Date**

**13** Select a **Payment Type**

**14** Enter a **Document No.** if applicable

**15** Click **Save**

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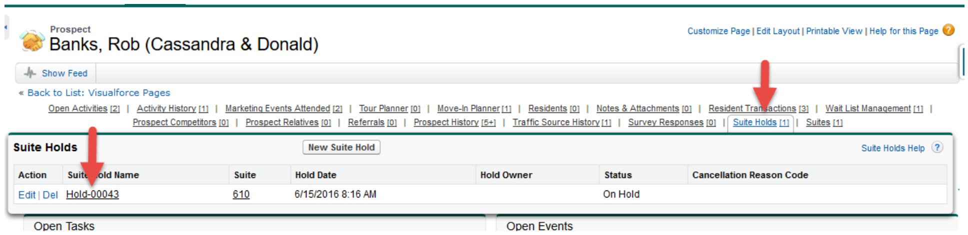
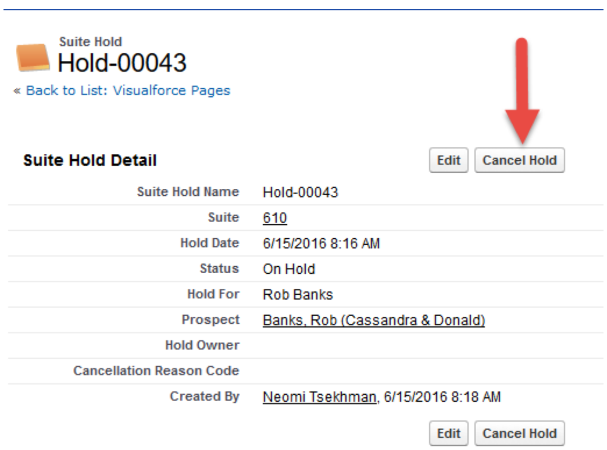
## Cancel a Suite Hold

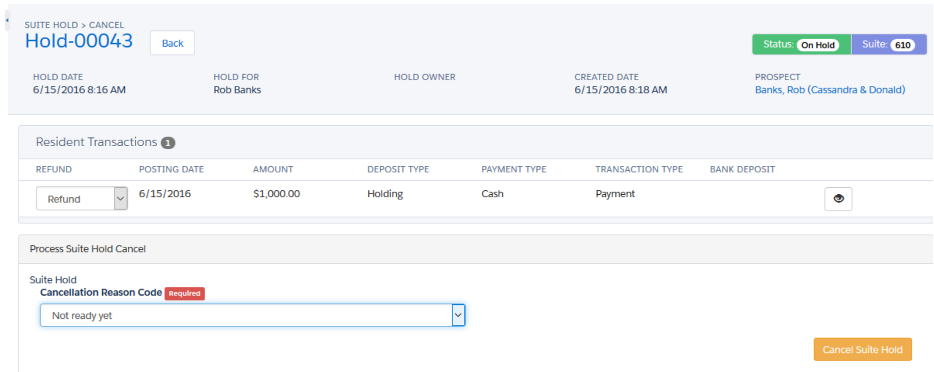
1. Navigate to the prospect’s profile page
2. In the “baby words” at the top of the page, hover over **Suite Holds**
3. Click the **Suite Hold Name**




4. Click **Cancel Hold**




5. Select a **Refund** option of *Refund, Returned,* or *Shredded*
6. Select a **Cancellation Reason Code**
7. Click **Cancel Suite Hold**



**NOTE:** If a suite hold needs to be cancelled *before* a prospect is linked to the suite hold record, simply delete the **Hold For** name on the suite record