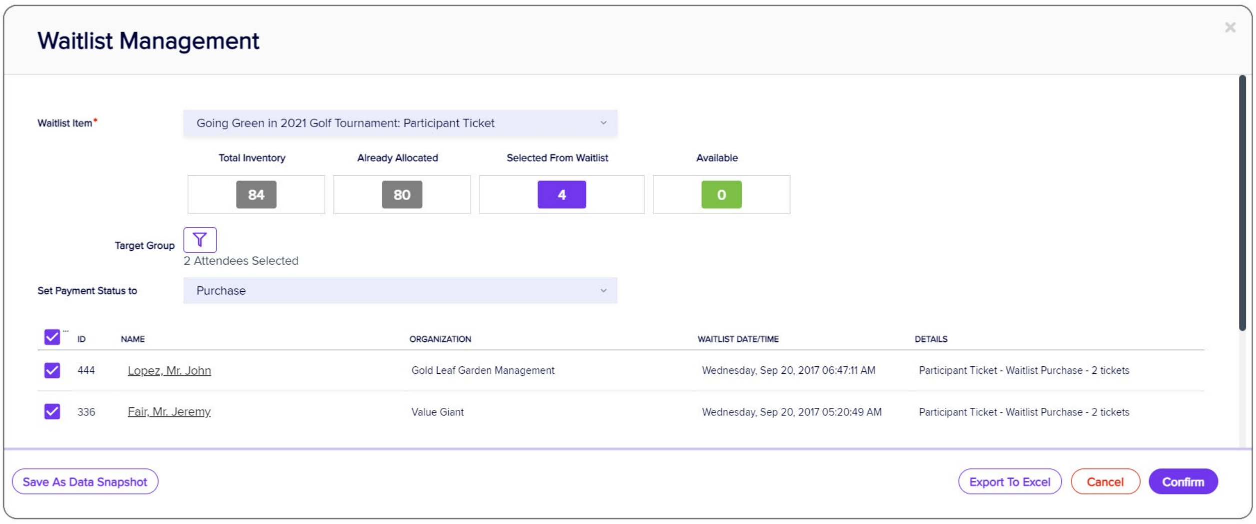
Waitlist Management (in Express Actions)

Last Modified on 06/02/2024 11:03 pm EDT

The Waitlist Management Express Action makes it easy to review and process your Waitlist requests. You can review waitlist requests by individual categories, then individually or in bulk move Waitlist requests to another option (such as purchase or cancel).

- In Express Actions, open the **Waitlist Management** Express Action tool.
- Select the **Waitlist Item** you want to manage to see its inventory grid.

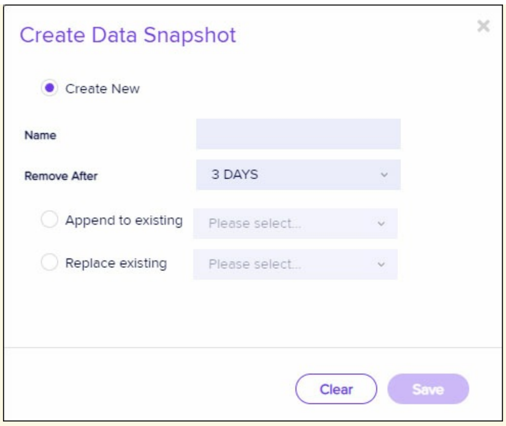


Use the Target Group Filter to select the relevant attendee records. (This is useful if you want to prioritize waitlist requests from a special group of attendees, such as VIPs or Exhibitors).

Save as Data Snapshot

If when you're filtering, you can use the **Save as Data Snapshot** option to save the current set of selected records, for example to use in a report or as part of a later filtering operation (e.g. to email all VIPs, while excluding those VIPs who got tickets). For more information, read this article about searching and filtering

Tip: If more Waitlisted VIPs have been added after you create the Data Snapshot, they will NOT appear if you recall this snapshot later. The **Save as Data Snapshot** button saves the filter **results** at that point in time, not the filter rules used to find them. To save the filter and include new records, use the **Save** button inside the Filter screen.



Choose and confirm

- Change the **Payment Status** to the desired setting.
- Choose which records you want to move off the Waitlist. You can choose **all**, or a sub-set of records. As you select or de-select records, the inventory numbers above for **Selected From Waitlist** and **Available** will adjust immediately.
- Select **Confirm** to move the selected records to the new (non-waitlist) Payment Status.

If you want to review your waitlist as a spreadsheet, you can **Export** it.