

Waitlist Management (in Express Actions)

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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 Payment Status option (such as Purchase or Cancel).

[Read more about setting up and managing Waitlists](#)

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

The screenshot shows the 'Waitlist Management' interface. At the top, there's a title bar with a close button. Below it, a dropdown menu is set to 'Going Green in 2021 Golf Tournament: Participant Ticket'. Underneath, four boxes show inventory counts: 'Total Inventory' (84), 'Already Allocated' (80), 'Selected From Waitlist' (4), and 'Available' (0). A 'Target Group' filter is active, showing '2 Attendees Selected'. Below that, a dropdown for 'Set Payment Status to' is set to 'Purchase'. A table lists waitlist items with columns for ID, NAME, ORGANIZATION, WAITLIST DATE/TIME, and DETAILS. Two items are listed: one for 'Lopez, Mr. John' and one for 'Fair, Mr. Jeremy'. At the bottom, there are buttons for 'Save As Data Snapshot', 'Export To Excel', 'Cancel', and 'Confirm'.

ID	NAME	ORGANIZATION	WAITLIST DATE/TIME	DETAILS
444	Lopez, Mr. John	Gold Leaf Garden Management	Wednesday, Sep 20, 2017 06:47:11 AM	Participant Ticket - Waitlist Purchase - 2 tickets
336	Fair, Mr. Jeremy	Value Giant	Wednesday, Sep 20, 2017 05:20:49 AM	Participant Ticket - Waitlist Purchase - 2 tickets

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

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 waitlisted VIPs, while excluding those VIPs who already bought 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.

Create Data Snapshot ✕

Create New

Name

Remove After ▼

Append to existing ▼

Replace existing ▼

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.