

Managing waitlists (various modules – setup)

Last Modified on 01/24/2025 7:53 pm EST

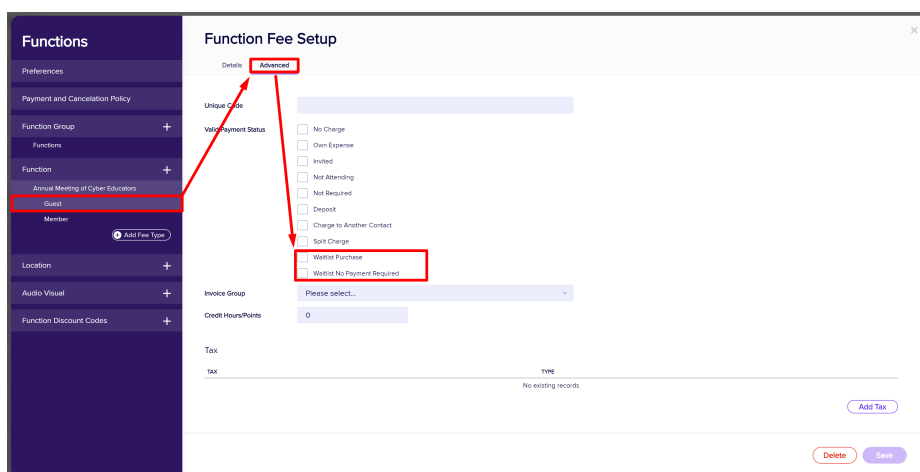
Managing waitlist requests properly helps you minimize waste and maximize opportunities to fill your event seats. There are three key steps to managing waitlists in EventsAir:

1. Enable **Waitlist Payment Statuses**.
2. Enable the **Waitlist option** in interactive (registration) sites.
3. Process Waitlist requests with the **Waitlist Management Express Action**.

Enable waitlist payment statuses

You can enable waitlist payment statuses for any Function, Registration, Accommodation or Travel module item with a set inventory level.

In the Setup panel, under the relevant module (e.g. Functions), look under the particular item (Function) setup, under the Advanced tab.



Enable one or both of these payment statuses:

- **Waitlist Purchase** – charges the item fee immediately
- **Waitlist No Payment Required** – won't charge the item fee

Enabling one or both of these options means they'll be available for you to choose when setting up Waitlisting on a registration site for this item.

Later, you'll use the Waitlist Management Express Action to decide how to handle each of the above (e.g. convert to purchase, cancel, etc.)

Add a waitlist to your interactive (registration) site

When you add a Registration, Function, Accommodation, or Travel item to an interactive (registration) site with either one or both Waitlist Payment Status[es] enabled, you can turn this feature on.

Click the cog icon in the appropriate element in the Site Builder.

When you expand the **Setup options** for a specific item, you'll see the option to enable the waitlist, and other options you can configure:

The screenshot shows the 'Waitlist' configuration panel. It includes a checked 'Enable Waitlist' checkbox, a 'When Inventory limit is below' field set to '10', a 'Waitlist Label' field with the text 'Please add me to the waitlist', a 'Waitlist Message' field with the text 'We will notify you if additional spaces become available.', and a 'Waitlist Payment Status' dropdown menu currently set to 'Waitlist Purchase'.

- **Enable Waitlist** – turns on Waitlisting for this specific item.
- **When Inventory Limit is Below** – starts the Waitlist at this limit, so you can keep some tickets/places in reserve. For example, if you enable waitlisting when the remaining inventory is **below 10**, the remaining **nine** tickets will be held aside as a reserve, and any new requests will be put on the Waitlist.

DON'T ENTER ZERO HERE – 1 is the lowest number (i.e. this will trigger when there are no tickets left. Entering zero will potentially cause problems.)

- **Waitlist Label** – the default text (you can change this).
- **Waitlist Message** – the default message (you can change this).
- **Waitlist Payment Status** – choose which Waitlist Payment Status will be allocated for this item (when the waitlist is activated).

When an attendee chooses a Waitlisted item that's reached its Inventory Limit, they'll see a message similar to the below:

The screenshot shows a waitlist message for the '27th Annual Gala Dinner' on 'Sep 27, 2029 | 1700 - 2100'. It lists two items: 'Guest' with an amount of 100.00 and a total of 0.00, and 'Members' with an amount of 50.00 and a total of 50.00. The 'Members' item is marked as 'Full' and includes a message: 'We will notify you if additional spaces become available.' and a checked checkbox for 'Please add me to the waitlist'.

Run the Waitlist Management Express Action

When you're ready, run the [Waitlist Management Express Action](#) to determine whether an attendee will be allowed to:

- purchase a seat/ticket [or allowed to have a seat/ticket with some other payment status such as inclusive or complimentary]; or
- have the item canceled on their record.

You may want to email people whose waitlist status has changed. To do this, you can save the list of those you filter for (when running the Waitlist Management Express Action) as a Data Snapshot. Then use the Data Snapshot as a filter when sending out your communication. NOTE: The Data Snapshot doesn't update - it's just the 'snapshot' of who matched the filter at the time it was run.

If you have too many tickets reserved

After running the Waitlist Management Express Action to clear any outstanding waitlist requests, you may have too many tickets in reserve. You can change or disable the waitlist settings on the interactive (registration) site and just allow these tickets to be purchased normally.
