

Managers, reminder on move-in requests. If the tenant is going to pay their move-ins charges on the portal here is what needs to happen PRIOR to filling out the move-ins request:

1. From the approved application page, under tasks: charge holding deposit. This initial charge should be ONLY FOR THE AMOUNT OF THE SECURITY DEPOSIT

The screenshot shows the 'Rental Application' page for Celina M. Flores. The 'Applicant Information' section includes: Name: Celina M. Flores, Type: Financially Responsible, Phone: (956) 503-2432, and Email: f.celina@icloud.com. The 'Tasks' menu on the right is open, and 'Charge Hold Deposit' is highlighted with a red box. Other tasks include Add Application, Group Applications, Convert To Tenant, View Guest Card, Generate Denial/Adverse Action Letter, Approve & Notify Applicant(s), Screening Criteria Templates, Help Topics, Screening Criteria, and Screening Policies.

The screenshot shows the 'Charge Hold Deposit' form. It includes a warning message: 'Applicants can only move into a unit that belongs to the property you choose here.' The 'Property' dropdown menu is set to 'Big Valley - 109 West Business Hwy 83 Donn'. The 'Amount' field is set to '\$ 1,000.00'. There are 'Next' and 'Cancel' buttons, and a 'Need Help?' link.

2. Once the deposit is charged, the tenant will then have a “future tenant” ledger. Then add an additional charge for the rent portion due at move-in.

receipts **Charges** Bank Deposits

## New Tenant Charge

[Repeat Charge](#)

Tenant \*  Amount \* \$ 500.00 Charge Date \* 10/17/2025 Posting Date ? 10/17/2025

**Big Valley**  
109 West Business Hwy 83  
Donna, TX 78537

GL Account \*

Description

Notify tenant of new charge ?

[Save & Add Another](#) [Save](#) [Cancel](#)

**Tenant Ledger** [View Tour](#) [Search Report](#) [Print to PDF](#) [Actions](#) [Refresh](#)

[Hide Details](#) [Customize](#)

Tenants: [Celina M. Flores](#)  
 Phone: (956) 503-2432  
 Unit: --  
 Property: [Big Valley - 109 West Business Hwy 83 Donna, TX 78537](#)  
 Status: Future  
 Move in date: 10/01/2025  
 Move out date: --  
 Lease Expiration: --  
 Rent: 0.00  
 Deposit Paid: 0.00

Date ↑	Payer	Description	Charges	Payme...	Balance
					0.00
					Starting Bala...
10/17/2025		Security Deposit (Tenant)	1,000.00		1,000.00
10/17/2025		Rental Income	500.00		1,500.00

3. Send applicant a portal activation invite!

**Online Portal Status** ? [Edit](#)

**PORTAL INACTIVE** Resident has not been invited

[f.celina@icloud.com](mailto:f.celina@icloud.com)

[Send Portal Activation Invite](#)

[More ▶](#)

4. **AFTER** their payment is received, submit move-in request.
5. EXAMPLE:
  - a. Tenant owes \$1,500 to move-in, \$1,000 towards deposit and \$500 as rent.
  - b. I will charge a holding deposit of \$1,000
  - c. Once they have a ledger, I will then add a charge of \$500 to the rental income GL

**Tenant Ledger**

[View Tour](#)  ^ v [Print to PDF](#) [Actions](#) [Refresh](#)

[Hide Details](#) [Customize](#)

Tenants: [Celina M. Flores](#)  
 Phone: (956) 503-2432  
 Unit: --  
 Property: [Big Valley - 109 West Business Hwy 83 Donna, TX 78537](#)  
**Status: Future**  
 Move in date: 10/01/2025  
 Move out date: --  
 Lease Expiration: --  
 Rent: 0.00  
 Deposit Paid: 0.00

Date	Payer	Description	Charges	Payme...	Balance
					0.00
					Starting Bala...
10/17/2025		Security Deposit (Tenant)	1,000.00		1,000.00
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