

Overview: AutoPay Approval Process

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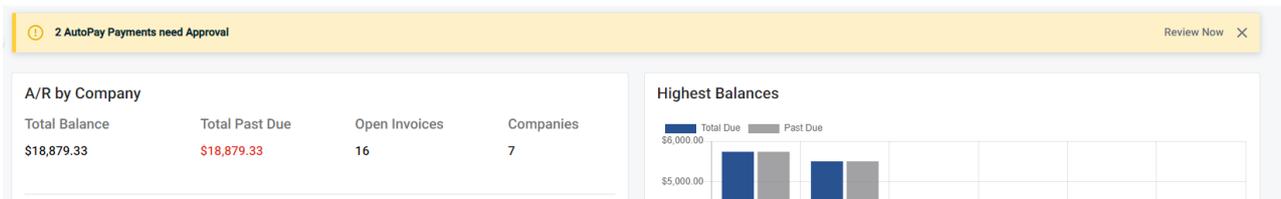
Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>

When AutoPay automatic approval is disabled, you will be required to approve AutoPay invoices before they are processed.

There are numerous locations that will alert you to any AutoPay payments requiring approval:

- **Tenant Overview Notification** - A notification will display at the top of the overview page when AutoPay payments need approval:



- **Payments Calendar** - The Payments Calendar will include the totals and events of both approved and unapproved AutoPay. On an organization's profile page, the calendar will only reflect payments for the selected company.

Payments Calendar

< April 2023 >

<p>Scheduled \$52,419.00</p>	<p>AutoPay \$3.33</p> <p>Review Now ></p>	<p>AutoPay (Unapproved) \$1,999.00</p> <p>Review Now ></p>
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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="background-color: #333; color: white; border-radius: 50%; padding: 2px 5px;">41</div> <div>14</div> </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <div style="background-color: #007bff; color: white; padding: 2px 5px;">39</div> <div style="background-color: #28a745; color: white; padding: 2px 5px;">1</div> <div style="background-color: #ffc107; color: white; padding: 2px 5px;">1</div> </div>	15
16	17	18	19	20	21	22
23	24	25	26	27	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="background-color: #333; color: white; border-radius: 50%; padding: 2px 5px;">1</div> <div>28</div> </div> <div style="background-color: #007bff; color: white; border-radius: 50%; padding: 2px 5px; margin-top: 5px;">1</div>	29
30	1	2	3	4	5	6

- **AutoPay Summary Email** - The internal AutoPay Summary notification email will include unapproved AutoPay and a direct link to the AutoPay approval page.

Choosing "Approve Now" from any of the above locations will direct you to AutoPay approval. This page displays all invoices and total balance of AutoPay invoices that are scheduled to be processed.

The screenshot shows the 'Autopay Invoices' interface. At the top, there are tabs for 'Approved' (1) and 'Unapproved' (2). The 'Unapproved' tab is active. Below the tabs, the 'Unapproved Total' is \$2,298.00. There are three buttons: 'Select All', 'Deselect All', and 'Approve Selected'. A search bar for 'Unapproved' invoices is visible. Below the search bar, there is a table with 2 items. The table has columns for Autopay Date, Name, Invoice, Payment Method, Amount, and Status. The first item is dated 05-24-2023, for XYZ Test Company, invoice CW6603, amount \$498.00, and status Unapproved. The second item is dated 05-24-2023, for XYZ Test Company, invoice CW6605, amount \$1,800.00, and status Unapproved. At the bottom, it says 'Showing 1 - 2 of 2 items' and '10 rows per page'.

To approve AutoPay:

1. Choose the **Unapproved** tab

This screenshot is similar to the first one, but a red box highlights the 'Unapproved' tab, which is the second step in the process.

2. Select the invoices you wish to approve. Use the "Select All" option to select all invoices at once.

3. Choose **Approve Selected**

This screenshot shows the 'Select All' and 'Approve Selected' buttons highlighted with red boxes, indicating the third step in the process.

4. You will be prompted to agree that you are approving invoices to be processed based on the AutoPay rules currently in place. Agreement is required to approve for processing.
5. Choosing **Agree** will approve the invoices for processing when AutoPay runs.

Once approved, the invoices are moved to the "Approved" tab and are updated to include the date and user that performed the approval for audit and informational purposes.

To unapprove AutoPay:

1. Choose the **Approved** tab

This screenshot shows the 'Autopay Invoices' interface with the 'Approved' tab highlighted by a red box, indicating the first step in the unapproval process. The 'Approved Total' is \$3.33. The 'Unapprove Selected' button is visible.

2. Select the invoices you wish to unapprove. Use the "Select All" option to select all invoices at once.
3. Choose **Unapprove Selected**

The screenshot shows the 'Autopay Invoices' interface. At the top, there are tabs for 'Approved' (1) and 'Unapproved' (2). Below the tabs, the 'Approved Total' is displayed as '\$3.33'. To the right of the total, there are three buttons: 'Select All', 'Deselect All', and 'Unapprove Selected'. The 'Unapprove Selected' button is highlighted with a red box. Above the buttons, there are date range selectors for 'From Date' (05-24-2023) and 'To Date' (06-24-2023). A search bar labeled 'Search Approved' is located below the total.

The unapproved invoices will be moved to the unapproved tab and the invoices will not be processed until the approval process is completed.

Date Range:

By default the range will display 30 days. If you have invoices with due dates falling outside of that range, you will need to adjust the dates to see those invoices appear in the approval list.

This screenshot is similar to the first one, showing the 'Autopay Invoices' interface. The 'Approved Total' is '\$3.33'. The date range selectors for 'From Date' (05-24-2023) and 'To Date' (06-24-2023) are highlighted with a red box. The buttons 'Select All', 'Deselect All', and 'Unapprove Selected' are visible below the date range selectors.