

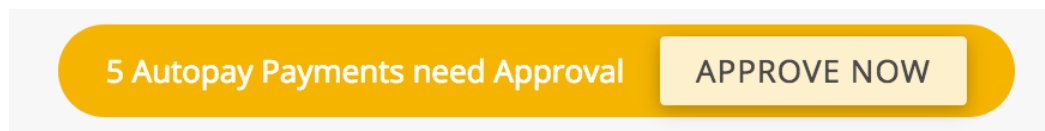
AutoPay Approval

Last Modified on 03/04/2019 2:42 pm CST

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 a customer's profile page, the calendar will only reflect payments for the selected company.

Payments Calendar

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July 2017

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Scheduled \$4,719.00	Autopay \$10.86k MANAGE >	Autopay (Unapproved) \$2,685.75 APPROVE NOW >
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Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21 \$4.7k \$11k \$2.7k	22

- **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.

Autopay Invoices

APPROVED 24 UNAPPROVED 5

Unapproved Total
\$2,685.75

SELECT ALL DESELECT ALL APPROVE SELECTED (0)

Unapproved Autopay invoices will not be paid until approved. [Change this setting](#)

	AUTOPAY DATE	CUSTOMER	INVOICE NUMBER	PAYMENT METHOD	AMOUNT	STATUS
<input type="checkbox"/>	7/21/17	Wild Eagle, Inc.	M1090	VISA Test Card 2	\$75.75	Unapproved
<input type="checkbox"/>	7/21/17	Wild Eagle, Inc.	M1091	VISA Test Card 2	\$98.00	Unapproved
<input type="checkbox"/>	7/21/17	Wild Eagle, Inc.	M1092	VISA Test Card 2	\$99.00	Unapproved
<input type="checkbox"/>	7/21/17	Middle Earth Tech Solutions	M1177	Sam's MC	\$2,315.00	Unapproved
<input type="checkbox"/>	7/21/17	Demo Company	QBINV123477	ABC Mercantile	\$98.00	Unapproved

To approve AutoPay:

1. Choose the **Unapproved** tab
2. Select the invoices you wish to approve. Use the “Select All” option to select all invoices at once.
3. Choose **Approve Selected**
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
2. Select the invoices you wish to unapprove. Use the “Select All” option to select all invoices at once.
3. Choose **Unapprove Selected**

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

