

AutoPay: Automatic Approval Process Settings

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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>

This setting allows you to automatically approve invoices for processing or require final review prior to processing payments of AutoPay invoices. When automatic approval is enabled, any invoices matching defined AutoPay settings will be processed without requiring any further action.

The screenshot shows the AutoPay settings page. At the top left is the 'AutoPay' logo and at the top right is 'AutoPay Help' with an external link icon. The main content area is titled 'AutoPay Settings' and contains several sections:

- Enable AutoPay:** A checked checkbox.
- AutoPay Fields 2/9:** A dropdown menu currently showing 'Contract, Amount'. Below it are two orange buttons: 'Select All' and 'Deselect All'.
- AutoPay Terms 0/5:** An empty dropdown menu. Below it are two orange buttons: 'Select All' and 'Deselect All'.
- AutoPay Contract Types 0/1:** An empty dropdown menu. Below it are two orange buttons: 'Select All' and 'Deselect All'.
- Enable automatic approval process:** A checked checkbox, which is highlighted with a red rectangular box.
- Allow Contract Invoices tied to Tickets to AutoPay:** An unchecked checkbox.
- Allow Contract Invoices tied to Projects to AutoPay:** An unchecked checkbox.
- Run AutoPay Now:** An orange button.

To enable automatic approval process:

1. Check the **Enable automatic approval process** option
 - 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 enable automatic approval.
2. **Save** the AutoPay configuration

To disable automatic approval process:

1. **Uncheck** the **Enable automatic approval process** option
2. **Save** the AutoPay configuration

Please see [Overview: AutoPay Approval Process](#) in the AutoPay section for more information on approval process.