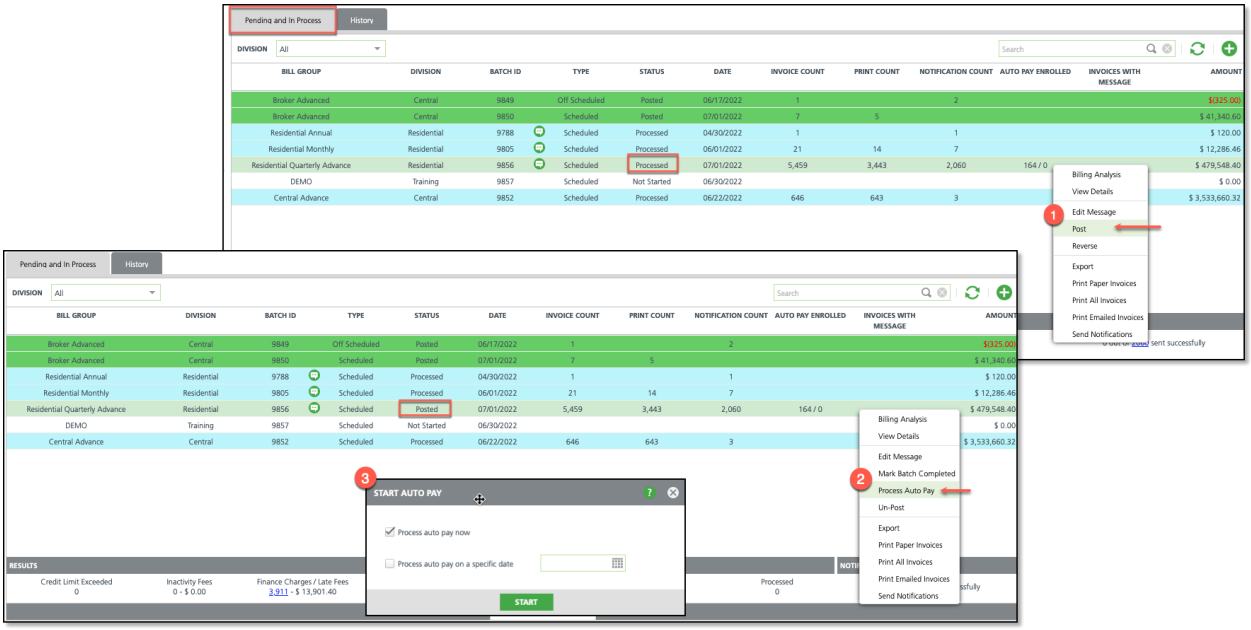
Processing Auto Pay During Billing

Last Modified on 06/25/2026 7:09 am PDT

Pathway: *Accounting > Billing*

This article explains how to process auto-pay from the Billing screen. It's important to note that a billing batch must be posted before auto-pay can be processed.

> **Note:** If a payment is made between the invoice date and the scheduled autopay date, the autopay will still process for the full amount, and the over-payment will be applied as a credit to the customer's account.



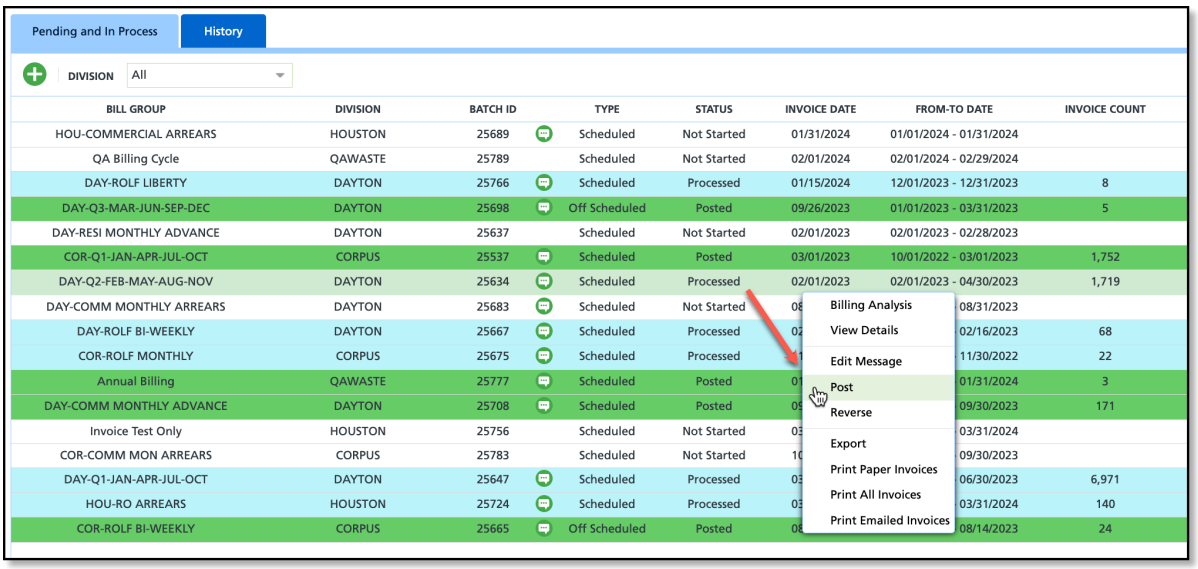
Permissions

The following permissions are required to process auto pay in the Billing module:

Permission ID	Permission Name
109	View Billing
111	Post Billing Batch

Prerequisite: Post a Billing Batch

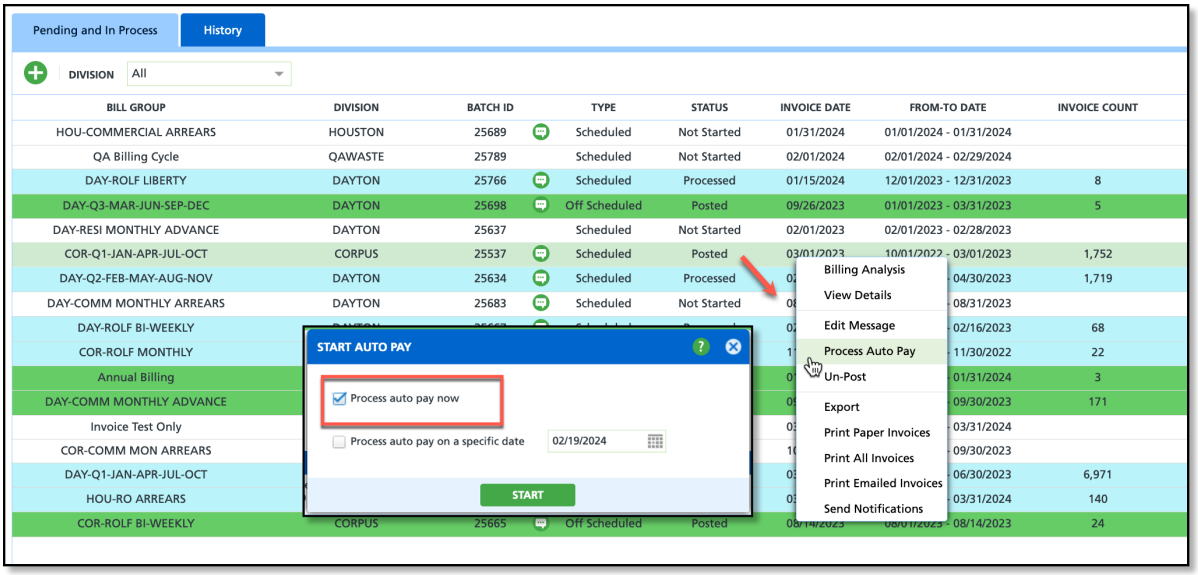
The option to select 'Process Auto Pay' only displays if the billing batch is in a 'Posted' status. To post a batch, follow the outlined process below. Further details on batch posting can be found in article: Process and Post a Billing Batch.



1. Right-click within the row of the processed batch.
2. Select **Post** from the drop down menu that displays. Select 'Yes' when the Confirmation popup displays.
3. Confirm 'Posted' is displaying in the Status column for the batch.

Process Auto Pay - During Billing

This option will process auto-pay immediately upon Start.

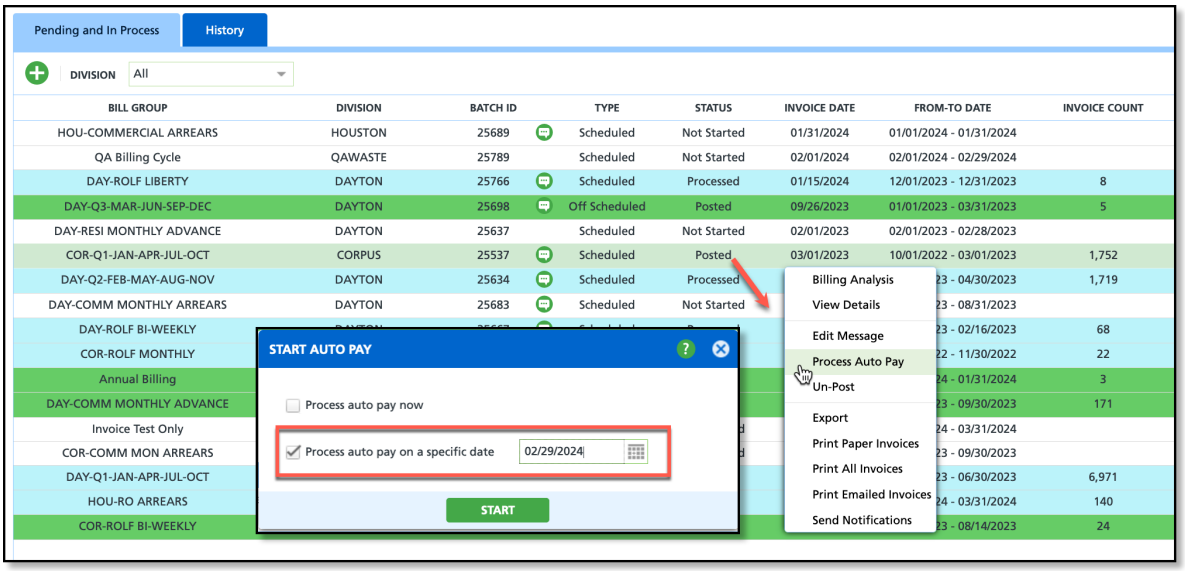


1. Right-click within the row of the posted batch.
2. Select **Process Auto Pay** from the drop down menu that displays.
    - Select **"Process Auto Pay Now"** from the Start Auto Pay pop-up window, and the system will initiate the payment processing.
3. Click "**Start,**" and auto pay will process according to the selections.

Process Auto Pay - Future Dated

This option will defer auto-pay processing to a future date, allowing it to be retrieved and processed using the AR Payment Batch tool *(Accounting > AR Payment Batch)*.

Refer to article "Posting Future Dated Auto Pay Batch" to process any batches that have been selected for future date processing.



1. Right-click within the row of the posted batch.
2. Select **Process Auto Pay** from the drop down menu that displays.
    - Select **"Process Auto Pay On a Specific Date"** and enter a future date for the auto-pay processing to occur.
3. Click "**Start,**" and auto pay will process according to the selections.

Related Articles

Billing - Process and Post a Billing Batch
Posting Future Dated Auto Pay Batch