

# Processing Auto Pay During Billing

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**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.

The screenshot displays the 'Pending and In Process' view of the Billing module. A table lists various billing batches with columns for BILL GROUP, DIVISION, BATCH ID, TYPE, STATUS, DATE, INVOICE COUNT, PRINT COUNT, NOTIFICATION COUNT, AUTO PAY ENROLLED, INVOICES WITH MESSAGE, and AMOUNT. A context menu is open over the 'Residential Quarterly Advance' batch (Batch ID 9856, Status 'Posted'), showing options like 'Billing Analysis', 'View Details', 'Edit Message', 'Post', 'Reverse', 'Export', 'Print Paper Invoices', 'Print All Invoices', 'Print Emailed Invoices', and 'Send Notifications'. A 'START AUTO PAY' dialog box is also open, with a 'START' button. Red callouts 1, 2, and 3 point to the 'Post' button, the 'Process Auto Pay' option, and the 'START' button, respectively.

BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	DATE	INVOICE COUNT	PRINT COUNT	NOTIFICATION COUNT	AUTO PAY ENROLLED	INVOICES WITH MESSAGE	AMOUNT
Broker Advanced	Central	9849	Off Scheduled	Posted	06/17/2022	1		2			\$125.00
Broker Advanced	Central	9850	Scheduled	Posted	07/01/2022	7	5				\$ 41,340.60
Residential Annual	Residential	9788	Scheduled	Processed	04/30/2022	1		1			\$ 120.00
Residential Monthly	Residential	9805	Scheduled	Processed	06/01/2022	21	14	7			\$ 12,286.46
Residential Quarterly Advance	Residential	9856	Scheduled	Posted	07/01/2022	5,459	3,443	2,060	164 / 0		\$ 479,548.40
DEMO	Training	9857	Scheduled	Not Started	06/30/2022						\$ 0.00
Central Advance	Central	9852	Scheduled	Processed	06/22/2022	646	643	3			\$ 3,533,660.32

## 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](#).

Pending and In Process		History					
+		DIVISION All					
BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	FROM-TO DATE	INVOICE COUNT
HOU-COMMERCIAL ARREARS	HOUSTON	25689	Scheduled	Not Started	01/31/2024	01/01/2024 - 01/31/2024	
QA Billing Cycle	QAWASTE	25789	Scheduled	Not Started	02/01/2024	02/01/2024 - 02/29/2024	
DAY-ROLF LIBERTY	DAYTON	25766	Scheduled	Processed	01/15/2024	12/01/2023 - 12/31/2023	8
DAY-Q3-MAR-JUN-SEP-DEC	DAYTON	25698	Off Scheduled	Posted	09/26/2023	01/01/2023 - 03/31/2023	5
DAY-RESI MONTHLY ADVANCE	DAYTON	25637	Scheduled	Not Started	02/01/2023	02/01/2023 - 02/28/2023	
COR-Q1-JAN-APR-JUL-OCT	CORPUS	25537	Scheduled	Posted	03/01/2023	10/01/2022 - 03/01/2023	1,752
DAY-Q2-FEB-MAY-AUG-NOV	DAYTON	25634	Scheduled	Processed	02/01/2023	02/01/2023 - 04/30/2023	1,719
DAY-COMM MONTHLY ARREARS	DAYTON	25683	Scheduled	Not Started	03/01/2024	03/01/2024 - 03/31/2024	
DAY-ROLF BI-WEEKLY	DAYTON	25667	Scheduled	Processed	02/16/2023	02/16/2023 - 02/16/2023	68
COR-ROLF MONTHLY	CORPUS	25675	Scheduled	Processed	11/30/2022	11/30/2022 - 11/30/2022	22
Annual Billing	QAWASTE	25777	Scheduled	Posted	01/31/2024	01/31/2024 - 01/31/2024	3
DAY-COMM MONTHLY ADVANCE	DAYTON	25708	Scheduled	Posted	09/30/2023	09/30/2023 - 09/30/2023	171
Invoice Test Only	HOUSTON	25756	Scheduled	Not Started	03/31/2024	03/31/2024 - 03/31/2024	
COR-COMM MON ARREARS	CORPUS	25783	Scheduled	Not Started	09/30/2023	09/30/2023 - 09/30/2023	
DAY-Q1-JAN-APR-JUL-OCT	DAYTON	25647	Scheduled	Processed	06/30/2023	06/30/2023 - 06/30/2023	6,971
HOU-RO ARREARS	HOUSTON	25724	Scheduled	Processed	03/31/2024	03/31/2024 - 03/31/2024	140
COR-ROLF BI-WEEKLY	CORPUS	25665	Off Scheduled	Posted	08/14/2023	08/14/2023 - 08/14/2023	24

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.

Pending and In Process		History					
+		DIVISION All					
BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	FROM-TO DATE	INVOICE COUNT
HOU-COMMERCIAL ARREARS	HOUSTON	25689	Scheduled	Not Started	01/31/2024	01/01/2024 - 01/31/2024	
QA Billing Cycle	QAWASTE	25789	Scheduled	Not Started	02/01/2024	02/01/2024 - 02/29/2024	
DAY-ROLF LIBERTY	DAYTON	25766	Scheduled	Processed	01/15/2024	12/01/2023 - 12/31/2023	8
DAY-Q3-MAR-JUN-SEP-DEC	DAYTON	25698	Off Scheduled	Posted	09/26/2023	01/01/2023 - 03/31/2023	5
DAY-RESI MONTHLY ADVANCE	DAYTON	25637	Scheduled	Not Started	02/01/2023	02/01/2023 - 02/28/2023	
COR-Q1-JAN-APR-JUL-OCT	CORPUS	25537	Scheduled	Posted	03/01/2023	10/01/2022 - 03/01/2023	1,752
DAY-Q2-FEB-MAY-AUG-NOV	DAYTON	25634	Scheduled	Processed	04/30/2023	04/30/2023 - 04/30/2023	1,719
DAY-COMM MONTHLY ARREARS	DAYTON	25683	Scheduled	Not Started	08/31/2023	08/31/2023 - 08/31/2023	
DAY-ROLF BI-WEEKLY	DAYTON	25667	Scheduled	Processed	02/16/2023	02/16/2023 - 02/16/2023	68
COR-ROLF MONTHLY	CORPUS	25675	Scheduled	Processed	11/30/2022	11/30/2022 - 11/30/2022	22
Annual Billing	QAWASTE	25777	Scheduled	Posted	01/31/2024	01/31/2024 - 01/31/2024	3
DAY-COMM MONTHLY ADVANCE	DAYTON	25708	Scheduled	Posted	09/30/2023	09/30/2023 - 09/30/2023	171
Invoice Test Only	HOUSTON	25756	Scheduled	Not Started	03/31/2024	03/31/2024 - 03/31/2024	
COR-COMM MON ARREARS	CORPUS	25783	Scheduled	Not Started	09/30/2023	09/30/2023 - 09/30/2023	
DAY-Q1-JAN-APR-JUL-OCT	DAYTON	25647	Scheduled	Processed	06/30/2023	06/30/2023 - 06/30/2023	6,971
HOU-RO ARREARS	HOUSTON	25724	Scheduled	Processed	03/31/2024	03/31/2024 - 03/31/2024	140
COR-ROLF BI-WEEKLY	CORPUS	25665	Off Scheduled	Posted	08/14/2023	08/14/2023 - 08/14/2023	24

1. Right-click within the row of the posted batch.
2. Select **Process Auto Pay** from the drop down menu that displays.
  - o 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.

The screenshot displays a software interface with a table of batches and a modal dialog box. The table has columns for BILL GROUP, DIVISION, BATCH ID, TYPE, STATUS, INVOICE DATE, FROM-TO DATE, and INVOICE COUNT. A context menu is open over a row with STATUS 'Posted', and the 'Process Auto Pay' option is selected. The 'START AUTO PAY' dialog box is open, showing options to 'Process auto pay now' (unchecked) or 'Process auto pay on a specific date' (checked). The specific date is set to 02/29/2024. A 'START' button is visible at the bottom of the dialog.

BILL GROUP	DIVISION	BATCH ID	TYPE	STATUS	INVOICE DATE	FROM-TO DATE	INVOICE COUNT
HOU-COMMERCIAL ARREARS	HOUSTON	25689	Scheduled	Not Started	01/31/2024	01/01/2024 - 01/31/2024	
QA Billing Cycle	QAWASTE	25789	Scheduled	Not Started	02/01/2024	02/01/2024 - 02/29/2024	
DAY-ROLF LIBERTY	DAYTON	25766	Scheduled	Processed	01/15/2024	12/01/2023 - 12/31/2023	8
DAY-Q3-MAR-JUN-SEP-DEC	DAYTON	25698	Off Scheduled	Posted	09/26/2023	01/01/2023 - 03/31/2023	5
DAY-RESI MONTHLY ADVANCE	DAYTON	25637	Scheduled	Not Started	02/01/2023	02/01/2023 - 02/28/2023	
COR-Q1-JAN-APR-JUL-OCT	CORPUS	25537	Scheduled	Posted	03/01/2023	10/01/2022 - 03/01/2023	1,752
DAY-Q2-FEB-MAY-AUG-NOV	DAYTON	25634	Scheduled	Processed			1,719
DAY-COMM MONTHLY ARREARS	DAYTON	25683	Scheduled	Not Started			
DAY-ROLF BI-WEEKLY							68
COR-ROLF MONTHLY							22
Annual Billing							3
DAY-COMM MONTHLY ADVANCE							171
Invoice Test Only							
COR-COMM MON ARREARS							
DAY-Q1-JAN-APR-JUL-OCT							6,971
HOU-RO ARREARS							140
COR-ROLF BI-WEEKLY							24

1. Right-click within the row of the posted batch.
2. Select **Process Auto Pay** from the drop down menu that displays.
  - o 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.