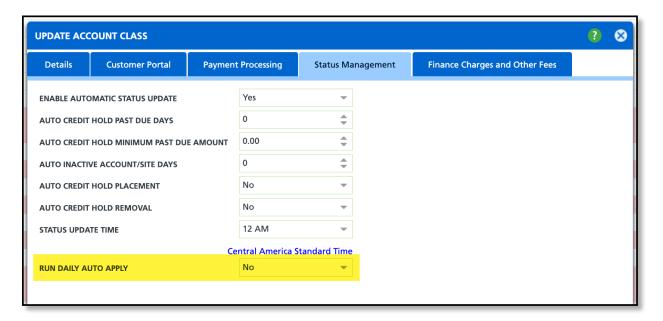# Daily Auto Apply

Last Modified on 06/10/2025 8:28 am PDT

Pathway: *Setup > Account > Account Class*

A "Run Daily Auto Apply" setting is available in the Account Class setup, under the Status Management tab. When enabled, this runs once daily to automatically apply any unapplied payments, credits, or adjustments on an account.

Permissions

The following permission is required for a user to enable the Run Daily Auto Apply setting:

Permission ID	Permission Name
23	Setup \ Account
95	Setup Main Menu

Logic

- There are no account, or site-specific settings for auto apply. The system automatically identifies accounts with unapplied items and includes them in the next processing job.
  - When enabled, the auto apply processing job is run **every day at 12:00AM.**

Other Manual Auto-Apply Methods Available

If **Run Daily Auto Apply** is not enabled for your system, the following manual auto-apply options are available:

AR History Auto-Apply

In an account's AR History, the Auto Apply feature applies any available credit to the oldest outstanding invoices first. Once selected, the system starts the process right away.
Pathway: *Customer Service Screen > AR History*
Related Article: AR History Overview

Unapplied Management

The Unapplied Management screen provides a detailed view of all payments and over-payments collected on an account that have not yet been applied to invoices. From this screen, users can manually apply payments or use the Auto Apply feature (accessible via right-click) to streamline the process.

Pathway: *Accounting > Unapplied Management*
Related Article: Unapplied Management