Automated Posting allows you to set a frequency at which the system will check for new Work to be posted and posts it automatically. This assumes your database is already configured for manual posting (for more information on this, see the **Posting Work** reference.)

Configuration

Tenants

For any tenant you wish to include in automated posting, complete the following:

- *Include in Automated Posting* – this checkbox must be selected for any Work linked to the Tenant to be included
- *Billing Contact* – a Contact with a valid email address should be linked in order to receive summary reports of cost/charges generated for the tenant following each automated posting
- *Property* – an active Property should be linked (under the **Defaults** tab of the standard form) in order to include the tenant costs/charges in the summary report by property generated following each automated posting

Properties

For each property you are including in automated posting, complete the following under the **Automated Posting** tab:

- *Work Error Recipients* – specify one or more email addresses (comma-separated) to receive notice of any errors with posting Work linked to the current property
- *Work Error Email Subject* – specify the subject of the email to be sent to the above recipients
- *Work Error Email Body* – (optional) link a paragraph with header text to precede any errors produced by the system
- *Work Error Email Closing* - (optional) link a paragraph with header text to follow any errors produced by the system

- *Posting Summary Recipients* – specify one or more email addresses (comma-separated) to receive a summary of costs/charges by tenant for all tenants linked to the current property
- *Summary Email Subject* – specify the subject of the email to be sent to the above recipients
- *Summary Email Body* – (optional) link a paragraph with header text to precede the system-generated summary
- *Summary Email Closing* - (optional) link a paragraph with header text to follow the system-generated summary

Work Transactions

Configure the settings under the **Automated Posting** tab of Work Transaction Preferences:

- *Timer Active* – select this once all settings have been configured correctly
- *Frequency* – select the frequency for automatically posting work (Daily, Weekly, Monthly)
- *Time of Day* – enter the time of day at which Work will be posted (should be off-hours)
- *Commencement* – select the date to start the automated posting; the process will continue based on the *Frequency* and *Time of Day* specified
- *Modify Search* – enter any search criteria to narrow down the Work to be posted, otherwise it will look to include all non-posted work linked to the included tenant(s) within your database

Contact your Client Success Manager for assistance on configuring the system for automated posting.

Automated Posting

With the above settings in place, the system should automatically post all Work records satisfying the search criteria on the frequency specified. The appropriate Work Transaction records will be created; you can tell they were automatically generated because the *Batch Number* will be prefaced with "AP" and the *Posted By* value will be "AUTOMATED".

Additionally, for each automated posting, following are the notifications which will be generated.

System Log
A new entry will be created for "Automated Posting Timer" with the details "Processing Finished". If there were any errors which prevented posting (incorrect Work Transaction settings or Work missing a Property), this will be noted here as well.

Work Error Report by Property
For each property linked to Work, it will generate an email to the *Work Error Recipients* specified for the property which includes:
- *Work Error Email Body* text referenced
- List of all errors which prevented posting for any Work linked to the given property, including any Work Validation violations or missing cost/charge accounts
- List of all warnings which do not prevent posting but may impact the ability to send out the proper notification, e.g. if a tenant does not have a Billing Contact, a Summary by Tenant will not be generated for them; if a tenant does not have a Property linked, it will not be included in the Posting Summary by Property
- *Work Error Email Closing* text referenced

Posting Summary by Property
For each property linked to Work, it will generate an email to the *Posting Summary Recipients* specified for the property which includes:
- For each tenant, lists the summary of charges followed by the summary of costs (if both are included) per Work. For each Work record, it displays the Number, Work Type, and total charge/cost. Note there may be multiple Work records referenced per tenant.

Summary Report by Tenant
For each tenant included, it will generate an email to their *Billing Contact* which includes:
- *Summary Email Body* text referenced on the tenant's linked property
- For each tenant, lists the summary of charges followed by the summary of costs (if both are included) per Work. For each Work record, it displays the Number, Work Type, and total charge/cost. Note there may be multiple Work records referenced.
- *Summary Email Closing* text referenced on the tenant's linked property