

## FAQ

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### Why can't I select an invoice for payment?

There are a few things to check if an invoice isn't showing for payment:

#### Invoice on Hold?

An on-hold invoice will be marked with an asterisk on the **Vendor Aging** report.

Vendor Aging Report									
9/16/2016 9:18 AM									
Vendor Aging									
Entity #401									
Vendor: Caro Produce & Inst Foods Age by Apply Date Cutoff Date 09/16/2016 Aging Date 9/16/2016									
Voucher/Pmt #	Doc Type	Document No.	Doc Date	Disc Date	Due Date	Current Period	31-60 Days	61-90 Days	91 and Over
CARO Caro Produce & Inst Foods									
V-401-0000124	* INV	6543135	12/20/12	12/20/12	12/30/12	\$0.00	\$0.00	\$0.00	\$9.00
Totals for Terri Test->						\$0.00	\$0.00	\$0.00	\$9.00
1 Voucher for CARO Caro Produce & Inst Foods									
Vendor Total:			\$9.00	Aged Totals:		\$0.00	\$0.00	\$0.00	\$9.00
Report Totals 1 Vendor									
Report Total:			\$9.00	Aged Totals:		\$0.00	\$0.00	\$0.00	\$9.00

\* = Denotes an invoice that is marked as On Hold

1. Go to **Reports > Accounts Payable > Vendor Aging**.
2. You can filter the report by the specific vendor and entity.
3. Review the invoice and see if it is marked by an asterisk.

If the invoice is on hold, you can opt to still include the invoice by clicking the **Include On-Hold transactions** box at the bottom of the **Payment Selection** screen, or **Clear All On-Holds** at the top of the screen:

**Payment Selection**

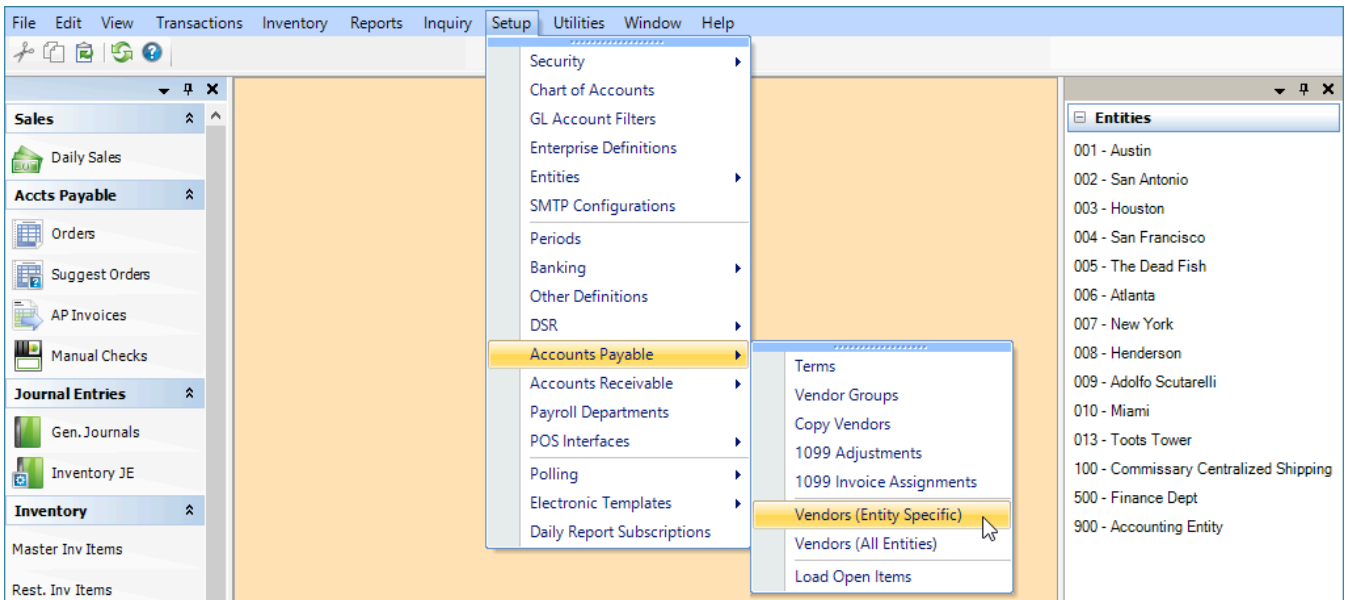
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**Selection Criteria**

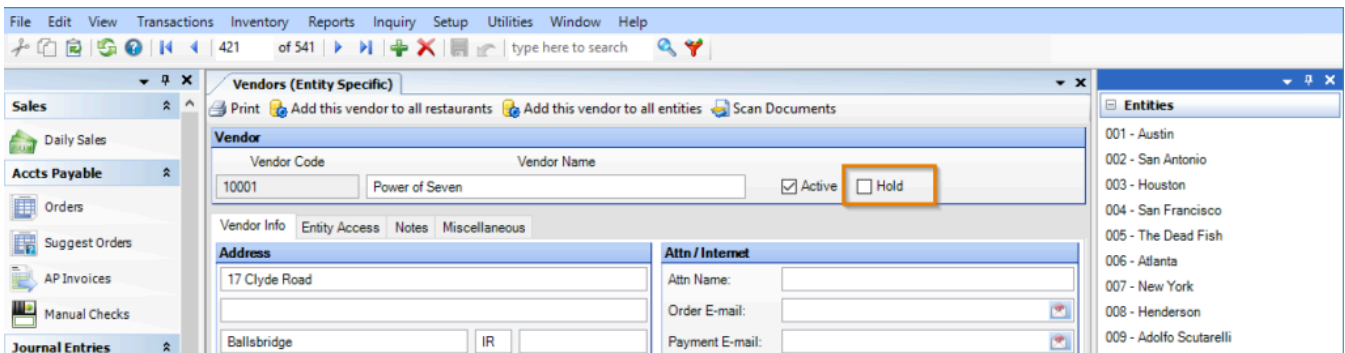
New Batch
  Existing Batch

Initials:   
 Batch Code:   
 Texas:   
 Southwest:   
 Vendor Group:   
 Vendor:   
 Include EFT Vendors  
 Voucher #  to   
 Doc Num:   
 Due By:   
 Include On-Hold transactions

Vendor on Hold?



1. Go to **Setup > Accounts Payable > Vendors (Entity Specific)**.
2. Search for the vendor for the invoice in question.
3. On the **Vendor Record**, check whether the **Hold** box is checked.



If the invoice is on hold, you can opt to still include the invoice by clicking the **Include On-Hold transactions** box at the bottom of the **Payment Selection** screen, or **Clear All On-Holds** at the top of the screen:

**Payment Selection**

Clear All On-Holds Create Payment Batch View Transactions Delete Batch

**Selection Criteria**

New Batch  Existing Batch

Initials:

Batch Code:

Texas:

Southwest:

Vendor Group:

Vendor:

Include EFT Vendors

Voucher #  to

Doc Num:

Due By:

Include On-Hold transactions

## Vendor Group Restrictions?

You will need your system administrator to review the **Vendor Restrictions** assigned to the security group that you are a part of:

**Groups**

**Group**

Group Name: Administrators Description: System Administrators Copy Group

Members Screen Access Inventory Levels Menu Item Levels **Vendor Groups** GL Accounts Customers

**Vendor Group Restrictions**

Vendor Group

\* (click here to add)

You can restrict this security group to only access the following vendor groups. If no vendor groups are entered, there will be no restrictions.

1. Go to **Setup > Security > Groups**, and select the security group you to which you are assigned.
2. Click the **Vendor Groups** tab.

If there are *any* vendor groups listed, these are the only vendor groups you are allowed work with. We encourage you to review the invoice vendor's vendor group assignment in their record (**Setup > Accounts Payable > Vendors (Entity Specific)** and choose the **Vendor** from the listing.)

## Invoice Already Batched?

In the **Payment Selection** screen, choose **Existing Batch** and click **View Transactions**. Review the list of invoices to see whether your invoice is included in an existing batch.

The screenshot shows the **Payment Selection** window. At the top, there are four buttons: **Clear All On-Holds**, **Add to Batch**, **View Transactions** (highlighted with an orange box), and **Delete Batch**. Below this is the **Selection Criteria** section. It contains a group box with two radio buttons: **New Batch** and **Existing Batch** (selected and highlighted with an orange box). Below the radio buttons are several input fields: **Initials:** (text box), **Batch Code:** (dropdown menu showing **PMT-CA-01530**, highlighted with an orange box), and a summary text **30 checks, 81 entries, \$26,933.94**. Other fields include **Texas:**, **Southwest:**, **Vendor Group:**, and **Vendor:** (all dropdown menus). There is a checkbox for **Include EFT Vendors** (unchecked). Below that are **Voucher #** (two dropdown menus with "to" between them), **Doc Num:** (dropdown menu), and **Due By:** (dropdown menu). At the bottom, there is a checked checkbox for **Include On-Hold transactions**.

## Invoice Already Paid?

If the invoice appears on the **Vendor Aging** report, but is not showing up for payment, consider if a payment may have been posted to a date later than the cutoff date selected on your **Report Options** screen:

**Report Options**

Entities

Entity #: 110 Company: District:

Entity Filter:

Cutoff Date  
Date: 9/19/2016

Aging Date  
Date: 9/19/2016

Age By  
 Doc Date  Discount Date  Due Date  Apply Date

Invoice Info  
 Detail  
 Show only partially paid invoices

Vendor  
Vendor:

Vendor Group  
Vendor Group:

Sort By  
 Vendor Code  
 Vendor Name

Initial View  
 Expanded  
 Collapsed

Group By  
 Entity, Vendor\*  
 Vendor\*, Entity

Vendor\* Group By  
 Vendor Group, Vendor  
 Vendor Only

1. Go to **Reports > Accounts Payable > Vendor Aging**.
2. Choose a later cutoff date.
3. Verify whether the invoice still appears outstanding.

If you are still unable to locate your invoice, please contact Compeat Support at [support@compeat.com](mailto:support@compeat.com) with the following details: invoice number, vendor, and amount. We can have one of our Support Consultants review the issue.

Was this Helpful ?

How do I view which vendors are receiving a 1099 for this tax year?

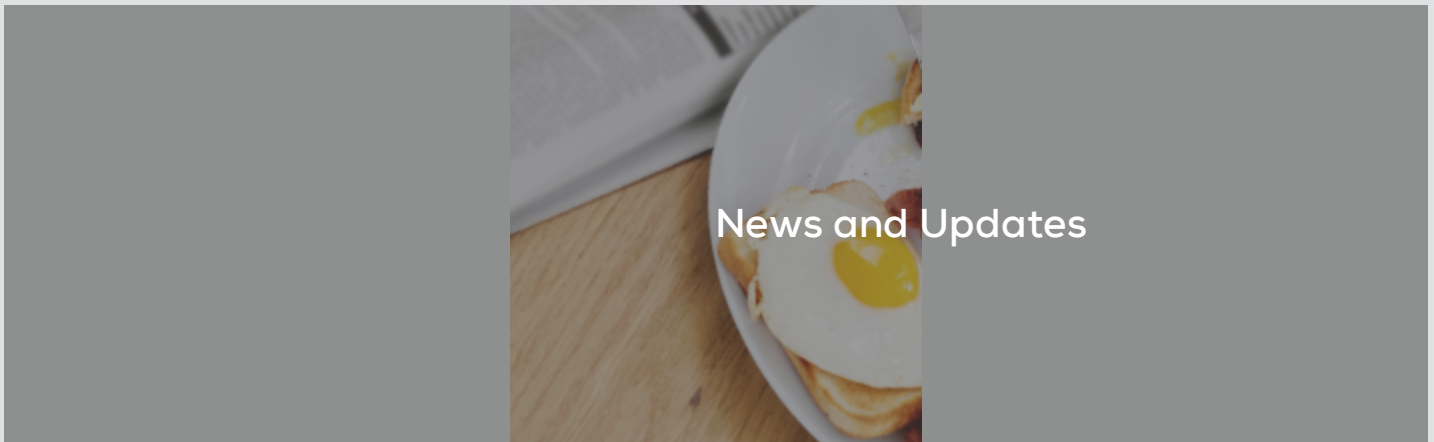
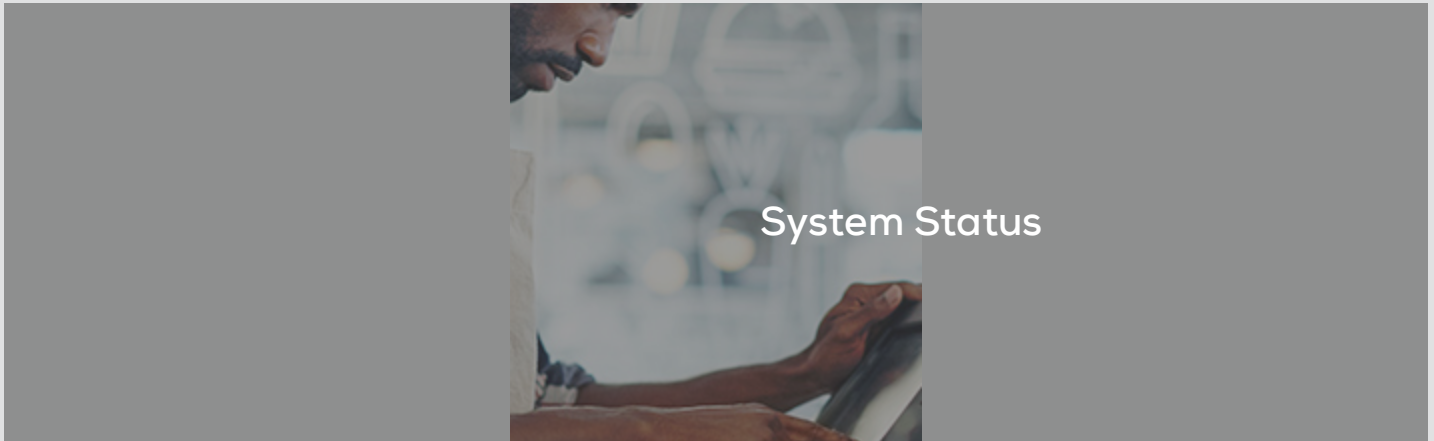
How do I make a vendor a 1099 vendor?

How do I make an vendor's invoice with a different 1099 box type than the default?

I am trying to import vendor files but Compeat says the directory doesn't exist. What do I do?

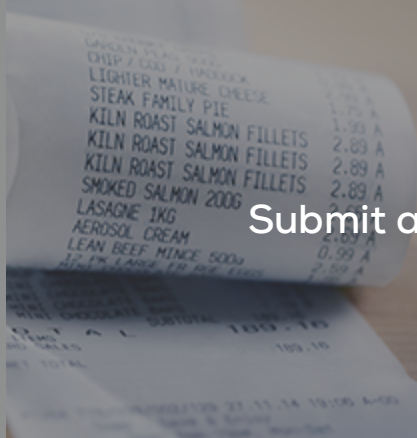
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## Learn More



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## Need More Help?



Submit a Ticket



Enhancements and Feedback