Sage Intacct minI-uSER Guide

Transaction: Pre-Authorization

Pre-Authorizations

This guide includes instructions on how to process pre-authorized payment within Sage Intacct.

To begin:

Navigate to **Accounts Receivable > Invoices > New Invoice**

1. Fill out all the required information to set up your new invoice. Once you are finished entering your data, click the “**Draft**” button in the top right hand of the screen.

Graphical user interface, application

Description automatically generated

1. On the main invoice page, you will be able to see the “State” of your invoice set to “Draft”. This means the pre-authorization was successful.
2. When you are ready to accept the payment, click on “**View**” on the invoice line item, then “**Post**”

Graphical user interface

Description automatically generated

1. Click on the **“Pay with Paya”** button on the top right-hand side of the screen and proceed with the payment process.

Graphical user interface, text, application, email

Description automatically generated

1. Select your payment method, enter require data, and use the pre-authorization that was already created.

Graphical user interface, application

Description automatically generated

1. Ensure a successful payment on the homepage and close out.