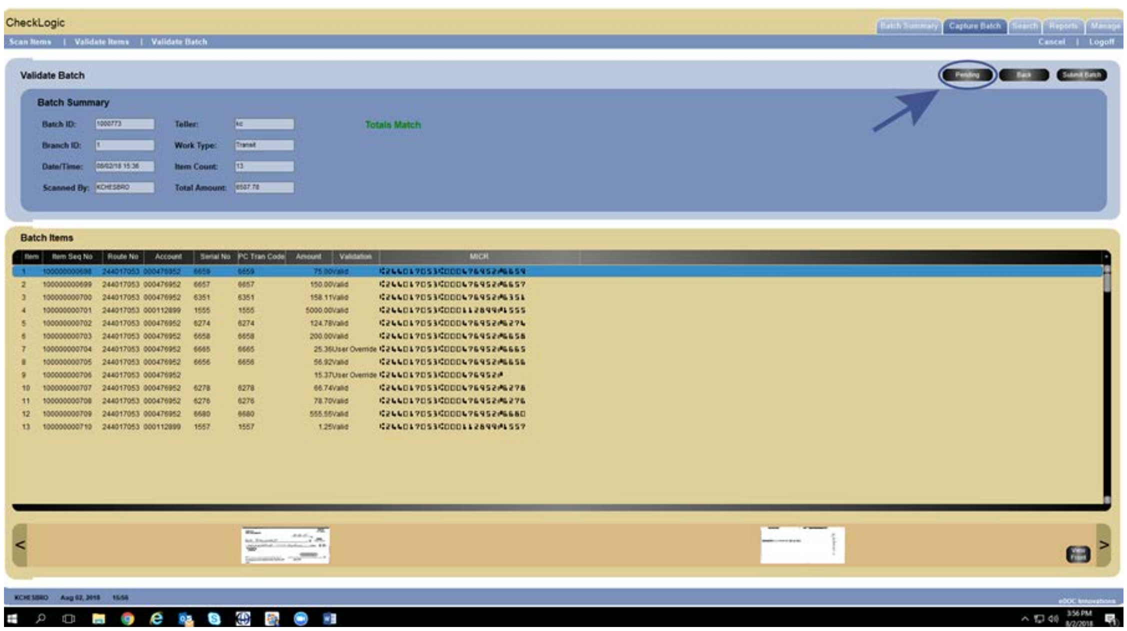
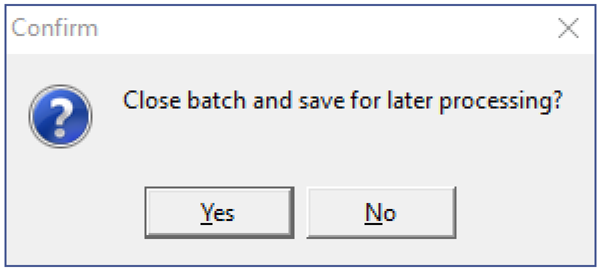
Tech Tip #5: Pending Batches in CheckLogic

The ***Pending Batch*** feature in CheckLogic allows you to put a partial batch on hold to be completed later that same day. To do this, click on the ***Pending***button on the upper right hand side of the CheckLogic screen. Once a pending batch is reloaded, additional checks may be added to the batch and reject/repair may be completed before the batch is submitted.



One the Pending button has been clicked, the following message will display.

- Answer ***Yes*** to put the batch in ***Pending*** (on Hold)
- Answer ***No*** to keep the batch open



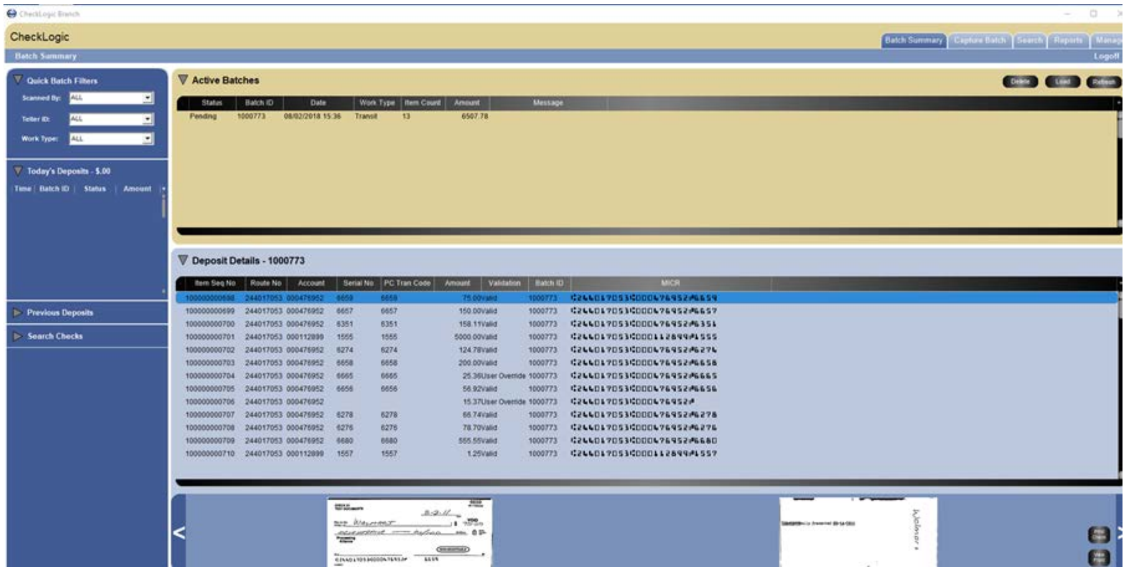
If you select ***Yes ,*** you will see the batch on the ***Active Batches*** screen in a ***Pending*** Status.

Caution - ***Pending batches must be Deleted or Loaded/completed before end of day (EOD).*** **If a batch is left in a Pending status it will skew the totals on your EOD reports.**

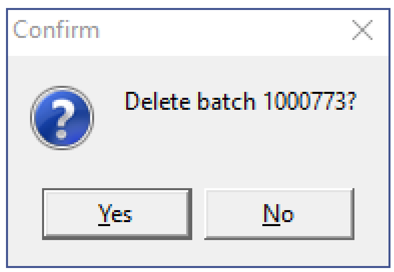
Delete a Pending Batch
If the ***Pending*** batch has been rescanned and is no longer needed, it must be deleted.

To Delete a Pending Batch:

1. Look for the dollar amount of the Pending Batch under **Today's Deposits**and **Previous Deposits.**
2. If you find the batch amount, it is okay to delete the **Pending** batch.
3. Click on the **Pending** batch line item on the **Active Batches** screen.
4. The batch detail will be displayed on the bottom half of the screen and three black buttons will be enabled on the upper right hand side of the screen, **Delete, Load and Refresh.**

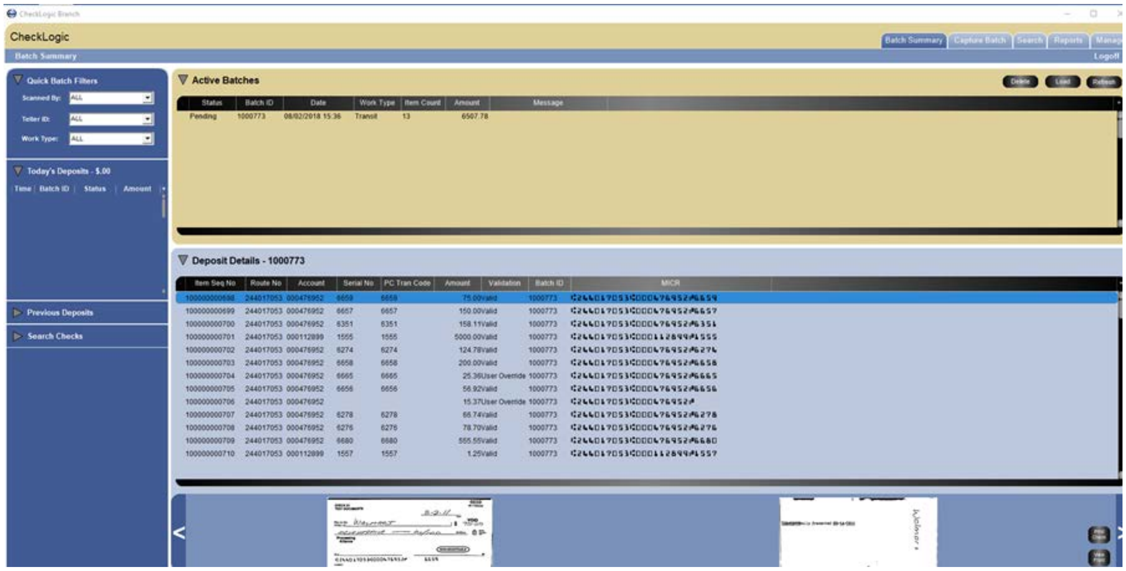


Click **Delete.** Confirm the batch ID displayed in the confirmation window matches that of the **Pending** batch. Click Yes to Delete the pending batch**.**



Complete / Submit a Pending Batch

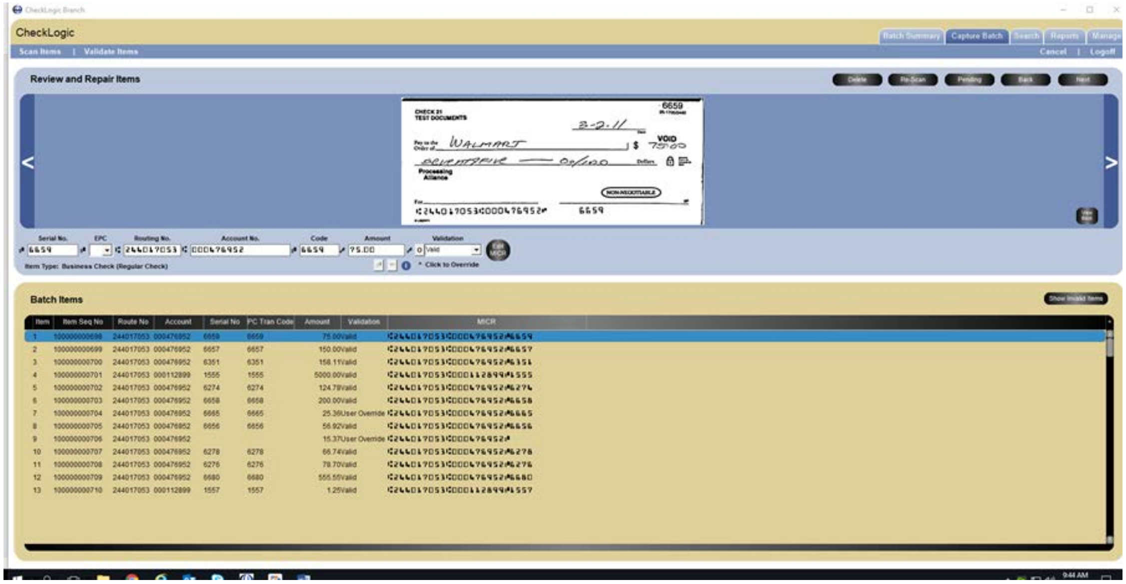
- Click on the **Pending** batch line item on the **Active Batches** screen.
- Click ***Load.***



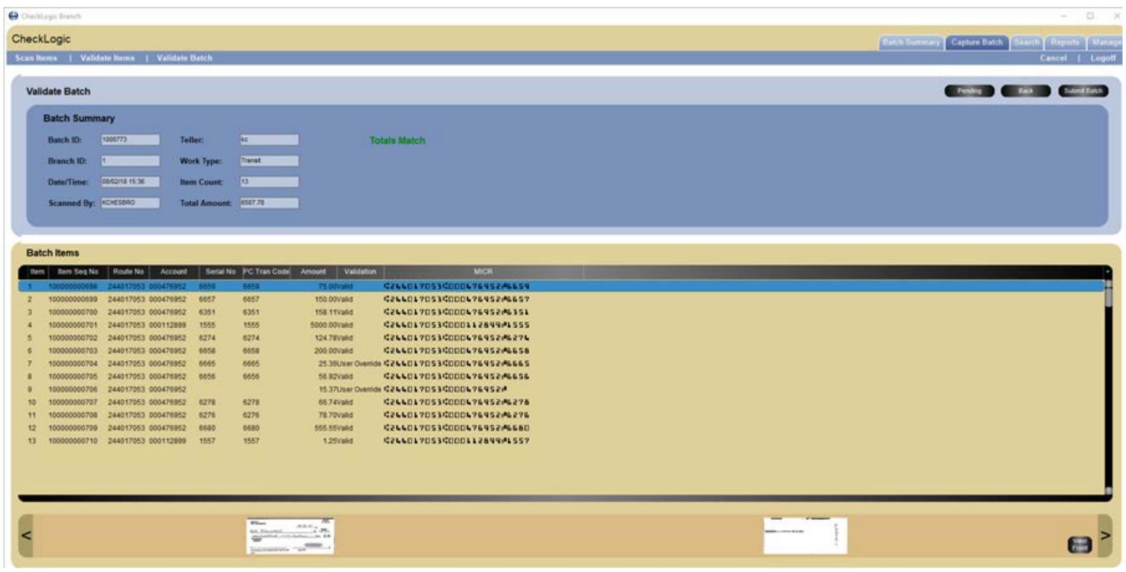
The batch Summary screen is displayed:

Additional items may now be added to the batch if necessary. Enter the number of items and Dollar Amount under the *Add Items* header. The CheckLogic software will automatically recalculate the batch totals (items and $$ totals). Scan the additional items.

If all items are already in the batch, click ***Next***, this will display the ***Review and Repair Items*** screen.



Complete repair on any items that require your attention. If no items require repair, click ***Next*** to advance to the ***Validate Batch*** screen. If in balance submit the Batch.



Did you find this tip helpful?

[Let us know here.]