

How to check the autopay date on an eCheck

08/12/2024 11:09 am EDT

AlarmBillr gives the dealer/employee the ability to pick the autopay date for their customers.

***Note:** end users (dealer's customers who enable autopay through the customer portal, are defaulted on the 1st of the month for autopay, without the ability to change it, unless they call the dealer)

Dealer can identify the autopay date on an eCheck payment method on file, by following the steps below:

Open the customer's account.

Go to the CC/eCheck tab below.

Click the eCheck tab.

There, click the edit button (pencil and notepad icon) to the right-hand side of the eCheck in question:

My Test-Customer - 1326

Canton, MI 48188

Phone: (999) 999-8521

Cell:

Email: ju@com

Customer Type: COMMERCIAL

Salesperson: Test Tech

Status: Active

Priority: Normal

Customer Since: 02/11/2020

Last Statement: 07/18/2024

Default Term: Net 10 Days

Recurring Term: Net 60

Service Term: Net 30 Days

Manual Term: 90 Days

Delivery Method: Mail

Deliver RMR Inv: Yes

Open Invoices: \$

Open Credits:

Unapplied Cash:

Balance Due: \$

Late Fee Balance:

Total Balance Due: \$

Total RMR:

Auto Pay: eCheck 2345

Comments

Invoices33Credits0Sites/Sys2RMR3Work Orders35Proposals1Payments29CC/eCheck14Notes4Contacts1Utilities

TransactionsCredit CardeChecks

eChecks

New eCheck

Account Name	Bank Name	Is Checki...	Las...	Auto Recurring	
My Test-Customer		Yes	2345	Yes	
My Test-Customer		Yes	3456	No	

You will see the autopay (auto draft) date, called Auto Day:

Edit eCheck

✕ Close

💾 Save

Bill To Options:

Use Customer Address: ☐

My

Test-Customer

Company Name

5775 Joy Rd

Address 2

Canton

Michigan

48187

(999) 999-8520

justatestemail@999.999.com

eCheck Information:

Type: Checking

Bank Name:

Account Name: My Test-Customer

Auto Pay:

Auto Recurring: ☒

Auto Day: 12

*1-28