

How to check the autopay date on an eCheck

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Managely 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 to the right-hand side of the eCheck in question:

The screenshot displays the 'My Test Account' interface for Customer #3702. The account is 'Active' and 'Normal', with a residential status since 6/16/23. Key financial metrics include a Total Balance Due of \$3,510.02 and a Total RMR of \$150.00. A 'Customer Aging' bar chart shows the distribution of payments across different age ranges. The interface includes a navigation bar with various tabs: Invoices (5), Credits (0), Credits Approval (0), Sites/Systems (2/1), Contracts (1), RMR (5), Work Orders (1), Bill To Information (1), Proposals (2), Payments (9), CC/eCheck (7), and Notes (0). The 'CC/eCheck' tab is selected and highlighted with a red box. Below this, the 'eChecks' sub-tab is also highlighted with a red box. A table lists eCheck entries, with the first entry for 'My Test Account' having a bank name ending in '3456' and an 'Auto Recurring' toggle set to 'Yes'. The 'Edit' button for this entry is highlighted with a red box.

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

Edit eCheck [X]

User Customer Address NO

Billing Address

Email

Account Type

Bank Name

Account Name

Auto Recurring YES

Auto Day