

How to Enable/Disable the Expired Credit Card Notifications (Managely)

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Follow these steps below to enable/disable the notification of expiring credit cards:

1. Click on Setup, then Automation (under Utilities).



1. If you would like your customers to receive an email that their credit card is going to expire (sent out on the 1st of each month), check the Expiring Credit Card Summary checkbox. If you do not want them to receive an email, uncheck the Expiring Credit Card Summary checkbox and then click Save.

Automation Settings

Save

☐ **Email Summary** Send an email summarizing company's daily activity At 12:30 AM (suppresses other automation emails).

☐ **Forte Payment Submit** Automatically submit Forte transactions At 08:00 AM and 05:00 PM, every day. [Run Now](#)

☐ **Forte Funding** [Run Now](#)

☒ **Expiring Credit Card Summary** Email summary of credit cards expiring this month or sooner At 04:30 AM, on day 1 of the month. [Run Now](#)

☐ **Invoice/Credit Delivery** Automatically (mail, email, and generate a print batch) for undelivered invoices and credits At 05:00 AM, every day. Mailing services start printing at 12:noon ET.

☒ **RMR Delivery** Automatically (mail, email, and generate a print batch) for undelivered RMR invoices At 05:00 AM, every day. Mailing services start printing at 12:noon ET.

☒ **RMR Generation** Generates Recurring Invoices every month At 03:00 AM.
 Run on the rd day of the month
 RMR Next Invoice for
 Invoice Date is the st day of
 Next RMR Run Date: 03/03/2025
 RMR Next Invoice Date: 04/01/2025
 Invoice Date: 04/01/2025
 Next CC/eCheck Funding Date: 04/xx/2025

☐ **Master RMR Generation** Generates Recurring Invoices every month at At 03:30 AM.
 Run on the st day of the month
 RMR Next Invoice for
 Invoice Date is the st day of
 Next RMR Run Date: 03/01/2025
 RMR Next Invoice Date: 03/01/2025
 Invoice Date: 03/01/2025
 Next CC/eCheck Funding Date: 03/xx/2025

☒ **Statement Generation** Generates Statements every month At 04:00 AM.
 Run on the th day of the month
 Next Statement Run Date: 02/18/2025
 Statement processing will use statement defaults as specified in Statement Rules.