

Expired Credit Card Report

Last Modified on 04/20/2022 7:26 pm EDT

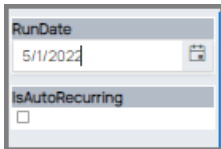
The Expired Credit Card Report prints a listing of customers setup with a credit card. This report may be generated to view credit cards that will be expiring soon so that your staff may take proactive steps to obtain a new card number or new expiration date for the card(s) on file.

There are two different report styles; you may generate the report for credit card customers setup for auto-pay or all credit card customers.

Report Parameters

The parameters available for this report are:

- Run Date
- Is Auto Recurring

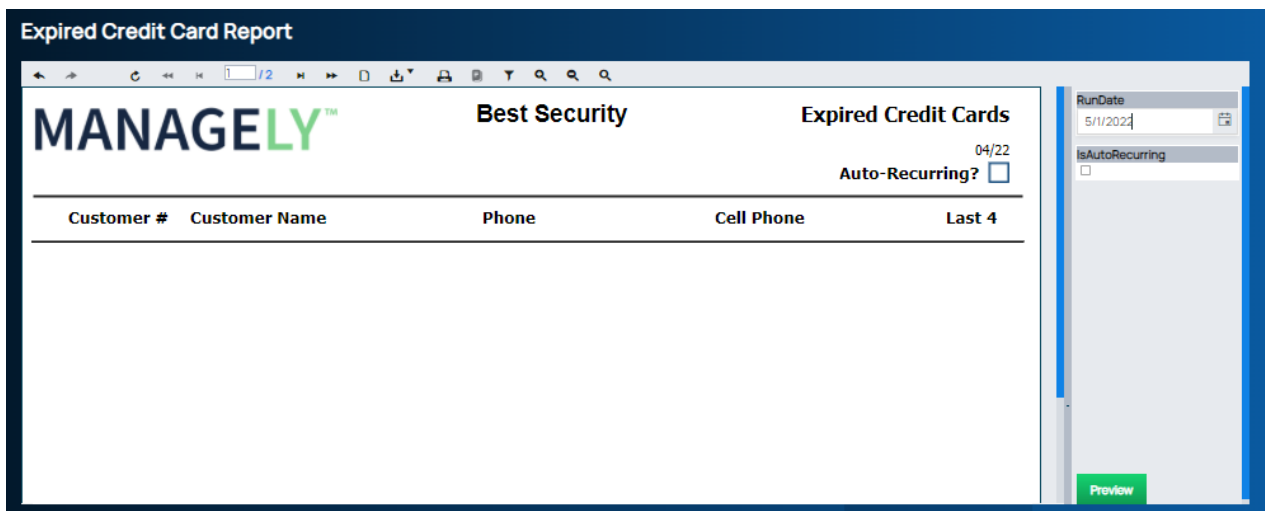


A screenshot of a web form with two fields. The first field is labeled 'RunDate' and contains the text '5/1/2024' with a calendar icon to its right. The second field is labeled 'IsAutoRecurring' and contains an unchecked checkbox.

Generate the Expired Credit Card Report

To generate this report, navigate to Reports > Customer > Expired Credit Card Report.

The Expired Credit Card Report page is displayed. In the Parameters area, make the desired selections. When finished, click on the Preview button.



A screenshot of a web browser displaying the 'Expired Credit Card Report' page. The browser window title is 'Expired Credit Card Report'. The page header includes the 'MANAGELY™' logo, 'Best Security', and 'Expired Credit Cards' with a date '04/22'. Below the header is a table with columns: 'Customer #', 'Customer Name', 'Phone', 'Cell Phone', and 'Last 4'. To the right of the table is a parameters area with 'RunDate' set to '5/1/2024' and 'IsAutoRecurring' unchecked. A green 'Preview' button is located at the bottom right of the parameters area.

The report results are based on the selections in the parameters area. Users may use the function buttons to print or export the report.

Below is a sample report where the “Is Auto Recurring” checkbox was selected.

Expired Credit Card Report

MANAGELY™ Best Security Expired Credit Cards 05/22

Auto-Recurring?

[-] Collapse/Expand All

[-] Expiration: 01/19

Customer #	Customer Name	Phone	Cell Phone	Last 4
1129	Mark Cushing			1552
Subtotal: 1				

[-] Expiration: 01/20

Customer #	Customer Name	Phone	Cell Phone	Last 4
1044	Justin Adams	(440) 773-1673	(440) 773-1673	1111
Subtotal: 1				

Grand Total: 2

Generated on 4/15/2022 1:29:00 PM 1 of 1

Below is a sample report where the "Is Auto Recurring" checkbox was cleared.

Expired Credit Card Report

MANAGELY™ Best Security Expired Credit Cards 04/23

Auto-Recurring?

[-] Collapse/Expand All

[-] Expiration: 03/21

Customer #	Customer Name	Phone	Cell Phone	Last 4
1140	John For	(440) 123-1233	(440) 123-1231	1552
Subtotal: 1				

[-] Expiration: 01/18

Customer #	Customer Name	Phone	Cell Phone	Last 4
1044	Justin Adams	(440) 773-1673	(440) 773-1673	1111