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:

< O My Test Account Customer #3702 (Active) (Normal) Residential - Since (in6/23			🧷 Edit	拦 Tasks う History
Total Balance Due \$3,510.ez Customer Aging	Phone - Cell -	95 	Salesperson PO Number Last Statement Default Term Part Pricing Level Delivery Method Delivery RMR Inv	- May 3, 2024 Due on Receipt - Email	
Invoices Credits Credits Approval Sites/Byste 5 0 0 2/1 Transactions Credit Card Cchecks	ms Contracts RMR 1 S	Work Orders Bill To Information 1 1	Proposals 2	Payments CC/eCher 9 7	ck Notes
+ Add #Check Account Name		Bank Name	Last 4 Aut	to Recurring	

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

EditeCheck				×
User Customer Address	NO		Account Type	Checking
Billing Address	Му	Test Account	Bank Name	Bank Name
	Company Name		Account Name	My Test Account
	123 Main St.		Auto Recurring	YES
	Address 2		Auto Day	12
	Ann Arbor Michigan	▼ 48185]	
Email	ju I.com]	
		Save Cancel		