

# How to check the autopay date on a credit card

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The dealer/employee has 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 1<sup>st</sup> of the month for autopay without the ability to change it, unless they call the dealer)

Dealer can identify the autopay date on a credit card payment method on file, by following the steps below:

1. Open the customer's account.
2. Go to the CC/eCheck tab below.
3. Click the Credit Card tab.
4. There, click the edit button (pencil and notepad icon) to the right-hand side of the credit card in question:

The screenshot shows a customer account page for "My Test-Customer - 1326". The page is divided into several sections:

- Customer Information:** Canton, MI 48188, Phone: (999) 999-8521, Cell: [redacted], Email: just.[redacted].com, Customer Type: COMMERCIAL, Salesperson: Test Tech.
- Status and Terms:** 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.
- Financial Summary:** Open Invoices: \$ 3, Open Credits: 0, Unapplied Cash: 0, Balance Due: \$ 3, Late Fee Balance: 0, Total Balance Due: \$ 3, Total RMR: 0, Auto Pay: 0.
- Comments:** A section for adding or viewing comments.
- Navigation Tabs:** Invoices (33), Credits (0), Sites/Sys (2), RMR (3), Work Orders (35), Proposals (1), Payments (29), **CC/eCheck (1)**, Notes (4), Contacts (1), Utilities.
- Credit Cards Section:** Contains a table of credit cards with columns for Account Name, Card Type, Expiration Date, Last 4, and Auto Recurring. A "New Credit Card" button is present.

Account Name	Card Type	Expiration Date	Last 4	Auto Recurring	
VISA Credit Card - 0026	Visa	2/2023	0026	No	 
MAST Credit Card - 9565	Master Card	3/2020	9565	No	 

You will see the autopay date, called Auto Day:

### Edit Credit Card

**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	

**Credit Card Information:**

Type:

Holder Name: VISA Credit Card - 0026

Expire Date: February

Description:

**Auto Pay:**

Auto Recurring:

Auto Day: 15 \*1-28