

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 1st 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. At the top, there are three panels: contact information (Canton, MI 48188, Phone: (999) 999-8521, Email: just.@[redacted].com, Customer Type: COMMERCIAL, Salesperson: Test Tech), account status (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), and 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). Below these panels is a "Comments" section. A navigation bar contains tabs for Invoices (33), Credits (0), Sites/Sys (2), RMR (3), Work Orders (35), Proposals (1), Payments (29), CC/eCheck (1), Notes (4), Contacts (1), and Utilities. The "CC/eCheck" tab is highlighted. Underneath, there are sub-tabs for Transactions, Credit Card, and eChecks. The "Credit Card" sub-tab is active, showing a table of credit cards. The table has columns for Account Name, Card Type, Expiration Date, Last 4, Auto Recurring, and an edit/delete icon. The first row is "VISA Credit Card - 0026" with Card Type "Visa", Expiration Date "2/2023", Last 4 "0026", and Auto Recurring "No". The second row is "MAST Credit Card - 9565" with Card Type "Master Card", Expiration Date "3/2020", Last 4 "9565", and Auto Recurring "No". A "New Credit Card" button is located at the top right of the credit card list. The edit icon for the VISA card is highlighted with a red box.

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 ×

Edit Credit Card Close Save

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