

# How to check the autopay date on an eCheck

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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 an eCheck 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 eCheck tab.
4. There, click the edit button (pencil and notepad icon) to the right-hand side of the eCheck 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: ju...@...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: \$, Open Credits: \$, Unapplied Cash: \$, Balance Due: \$, Late Fee Balance: \$, Total Balance Due: \$, Total RMR: \$, Auto Pay: eCheck 2345.
- Comments:** A text area for adding comments.
- Navigation Tabs:** Invoices (33), Credits (0), Sites/Sys (2), RMR (3), Work Orders (35), Proposals (1), Payments (29), **CC/eCheck (14)**, Notes (4), Contacts (1), Utilities.
- eChecks Section:** A sub-tabbed section with "eChecks" selected. It contains a table of eChecks and a "New eCheck" button.

Account Name	Bank Name	Is Checki...	Las...	Auto Recurring	
My Test-Customer		Yes	2345	Yes	 
My Test-Customer		Yes	3456	No	 

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

Edit eCheck x

**Edit eCheck** Close Save

**Bill To Options:** Use Customer Address:

My	Test-Customer
Company Name	
5775 Joy Rd	
Address 2	
Canton	Michigan 48187
(999) 999-8520	justatemail@999.999.com

**eCheck Information:**

Type:	Checking
Bank Name:	
Account Name:	My Test-Customer

**Auto Pay:**

Auto Recurring:

Auto Day: 12 \*1-28