

# How to check the autopay date on an eCheck

Last Modified on 09/24/2024 12:37 pm EDT

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 Priority:** 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-section with tabs for Transactions, Credit Card, and **eChecks**. A "New eCheck" button is present.
- eChecks Table:** A table with columns: Account Name, Bank Name, Is Checki..., Las..., Auto Recurring. Two rows are visible:

| Account Name     | Bank Name | Is Checki... | Las... | Auto Recurring |                |
|------------------|-----------|--------------|--------|----------------|----------------|
| My Test-Customer |           | Yes          | 2345   | Yes            | [Edit] [Trash] |
| My Test-Customer |           | Yes          | 3456   | No             | [Edit] [Trash] |

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