

Add Site RMR

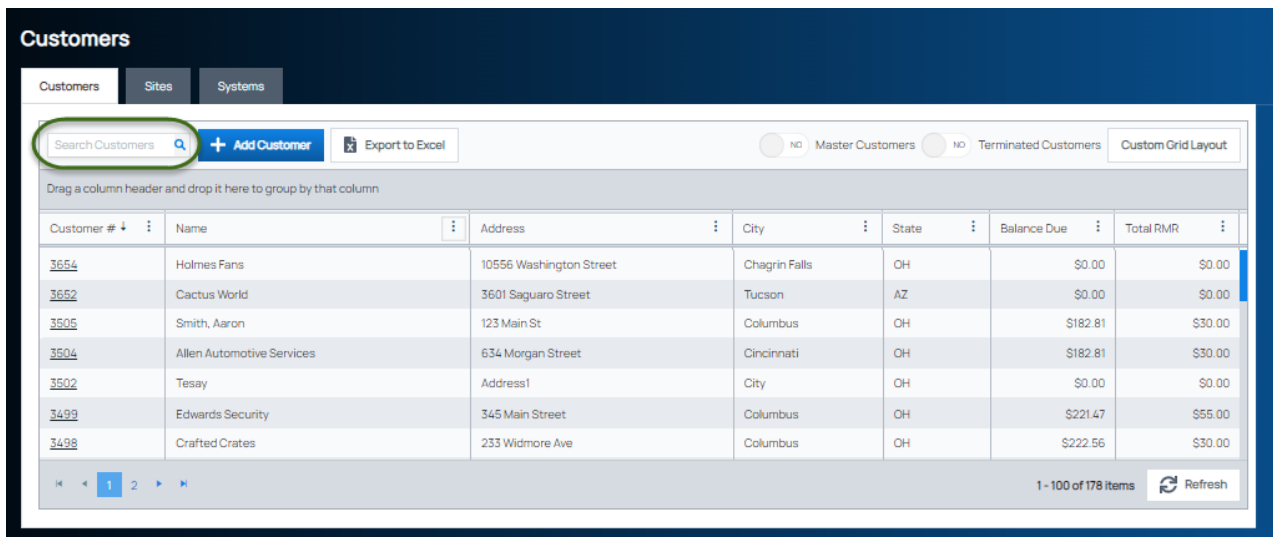
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RMR (Recurring Monthly Revenue) is a service invoiced to a customer on a recurring basis. RMR is typically attached to a System record, however, the software will allow you to attach an RMR to a Site record.

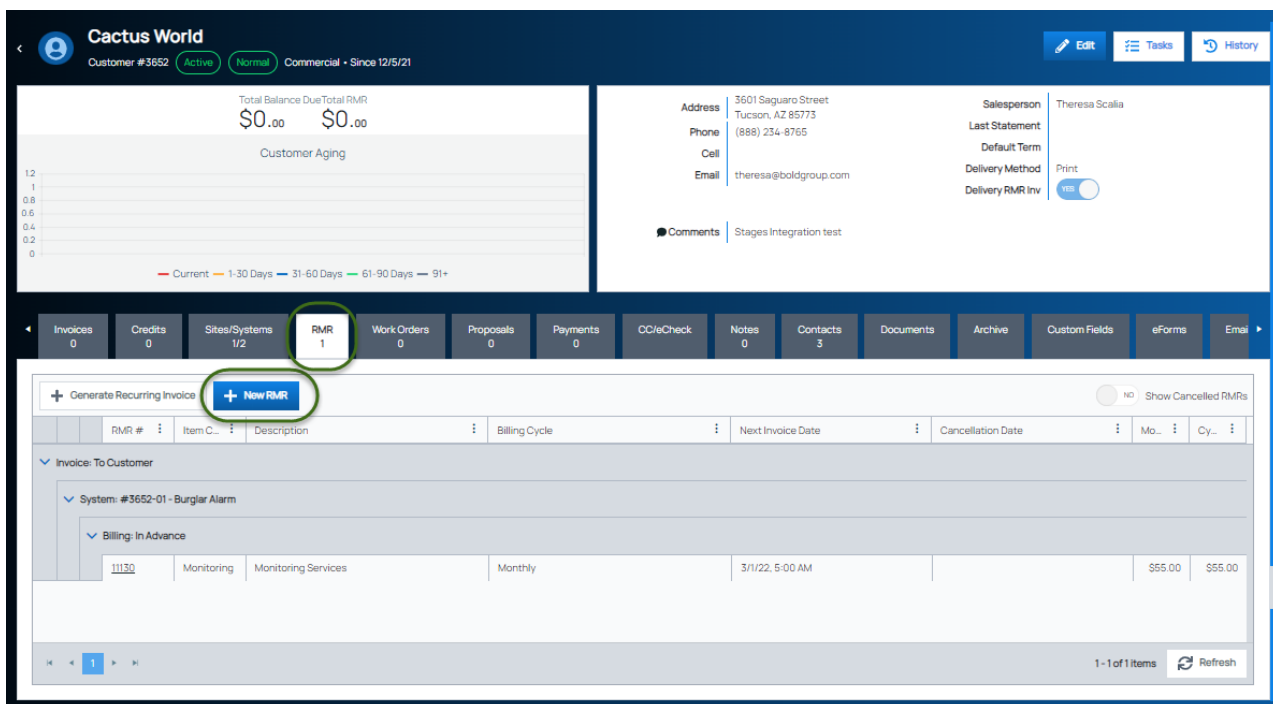
To add an RMR, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record opens. Click on the RMR tab, and then click on the New RMR button.



The New RMR form opens. Fill in the form, and then click on the Save button at the bottom of the form when finished.

Data entry fields with a red bullet next to the field name are required.

The screenshot shows a 'New RMR' form with the following fields and controls:

- Customer Site (required)
- Customer System
- Item (required)
- Description (0/500)
- Deferred Posting Day (1)
- Discount Item
- Monthly Amount (\$0.00)
- Cycle Amount (\$0.00)
- Default Cost (\$0.00)
- Invoice In Arrears (OFF)
- Do Not Prorate (OFF)
- Use Cycle Amount (OFF)
- Qty Based Billing (OFF)
- Include Memo (OFF)
- Memo (0/500)
- Activation Date (4/21/2022)
- RMR Cycle Start Date
- Last Invoice Date
- Custom Date
- Billing Cycle (Monthly)
- Recurring Reason
- RMR Group
- P.O. Number

Buttons: Save, Cancel

Prorating

This is a toggle button (Do Not Prorate) on the RMR which controls the date on which billing will begin. Below is a chart explaining the results you will receive based upon the toggle setting.

Do Not Prorate Setting	Billing Cycle	Activation Date	Next Invoice Month	Billing Period on First Invoice
Off	M	03/10	March	03/10 - 03/31
Off	Q	03/10	March	03/10 - 05/31
On	M	03/10	March	04/01 - 04/30
On	Q	03/10	March	04/01 - 06/30

Quantity Based Billing

Quantity Based Billing is an available option if you are billing your customer for a number of devices or objects.

Situations where you would use quantity based billing:

- The customer is invoiced based upon the number of monitored devices (points of protection) at the site.
- You are invoicing for elevator monitoring and want to bill by the number of elevators monitored.

If the Qty Based Billing toggle button is set to Yes, a new field is displayed on the RMR data entry form to enter the quantity.

Each data entry field will be described below.

Data Entry Fields

Data entry fields preceded with an asterisk are required.

- **Customer Site:** From the drop-down list, select the appropriate site.
- **Customer System:** Do not make a selection in this field.
- ***Item:** From the drop-down list, select the Item code for the recurring service. Item codes are maintained in setup (Setup > Items & Parts > Items > Invoice Items).
- **Description:** This will auto-fill with the description on the Item code setup. You can change this if needed. Maximum of 250 characters allowed.
- **Invoice In Arrears:** If you cannot invoice the customer until the service period is over, set this toggle button to On.
- **Do Not Prorate:** If the activation date is not on the first of the month, and you do not want to prorate the first month of service, set this toggle button to On.
- **Use Cycle Amount:** If the billing cycle is other than monthly, and you want to enter the cycle amount instead of the monthly amount, set this toggle button to On.
- **Qty Based Billing:** If quantity based billing will be used, set this toggle button to On.
- **Include Memo:** If text is entered into the Memo field and you want that information to print on the recurring invoice, set this toggle button to On.
- **Memo:** This is a free-form text field that may be printed on the customer invoice or just be internal information. This information will only print if the Include Memo toggle button is set to On. Maximum of 500 characters allowed.
- **Activation Date:** Enter the date the monitored system was activated at the central station. This is also the date when the RMR will start billing.
- ***Next Invoice Month:** Enter the month/year to begin billing the RMR.
- **Last Invoice Date:** Ignore this field. Once the RMR has been invoiced for the first time, this field will auto-fill with the last invoice date.
- **Custom Date:** Currently, this field is for informational purposes only.
- **Cancellation Date:** If there is a known end date for this RMR, enter the end date, otherwise skip this field.
- **Billing Cycle:** From the drop-down list, select the billing cycle.
- **Recurring Reason:** From the drop-down list, select the appropriate reason for creating this new RMR – typically New. Recurring Reason codes are maintained in setup (Setup > Other > Recurring Reasons).
- **PO Number:** If the customer has provided a purchase order number that must print on the invoice, enter that value in this field.
- **Discount Item:** If you are offering the customer a discount, select the discount Item code from the drop-down list. If an Item code was selected in this field, a new field is displayed below this field to enter the discount percentage.
- **Monthly Amount:** Enter the monthly amount for the RMR. If the toggle button Use Cycle Amount was set to On, this field will not be displayed.
- **Cycle Amount:** If the toggle button Use Cycle Amount was set to On, enter the cycle amount.
- **Default Cost:** If a value was entered for the cost on the Item code setup, a value will be displayed. This is for informational and reporting purposes only.

When finished filling in this form, click the **Save** button at the bottom of the form.

