Delete Site RMR

Last Modified on 12/13/2024 4:51 pm EST

You can delete an RMR record only if the RMR has never invoiced and you have permissions to delete RMR.

RMR records are attached to a Customer record, so 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.

Cu	Customers											
()	Customers Sites Systems											
(Search Customers	Search Customers 🔍 + Add Customer 🕅 Export to Excel									Custom Grid Layout	
	Drag a column header a	and drop it here to group by that	column									
	Customer # 🕴 🚦	Name		:	Address	:	City :	State :	Balance Due :	Total RMR		
	3654	Holmes Fans			10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00		
	3652	S52 Cactus World 505 Smith, Aaron			3601 Saguaro Street 123 Main St		Tucson	AZ	\$0.00	\$0.00		
	3505						Columbus	ОН	\$182.81	\$30.00		
	<u>3504</u>	Allen Automotive Services			634 Morgan Street		Cincinnati	Cincinnati OH		\$30.00		
	3502	Tesay			Address1		City	ОН	\$0.00	\$0.00		
	<u>3499</u>	Edwards Security			345 Main Street		Columbus	ОН	\$221.47	\$55.00		
	<u>3498</u>	Crafted Crates			233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00		
	K < 1 2 ▶ M 1-100 of 178 items 2 Refresh											

The Customer record opens. Click on the RMR tab. A list of RMRs attached to the Customer is listed in the grid area. Click on the hyperlink to the left of the RMR you want to delete.

Cactus World Customer #3652 (Active) (Normal) Commercial - Since 12/5/21					🧨 Edit	Tasks	3 History				
Total Balance Due Total RMR \$0.00 \$0.00		Address	3601 Saguaro Street Tucson, AZ 85773 (888) 234-8765	Sale Last St	sperson Theresa Scalia atement						
Customer Aging	Cell Email Comments	theresa@boldgroup.com Stages Integration test	Defa Delivery Delivery	Method Print RMR Inv							
Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+ Invoices Credits Step/Systems RMR WorkOrders 0 11/2 1 0	Proposals Payment 0 0	s CC/eCheck	Notes Contacts 0 3	Documents Archiv	e Custom Fields	eForms	Emai 🕨				
+ Generate Recurring Invoice + New RJR						D Show Canc	elled RMRs				
RMR # i Item C_ i Description	Billing Cycle	:	Next Invoice Date	Cancellation	Date :	Mo_ i	су Е				
 ✓ System: #3652-01 - Burglar Alarm ✓ Billing: In Advance 											
Monitoring Monitoring Services	Monthly		3/1/22, 5:00 AM			\$55.00	\$55.00				
н (1-1of	l items	Refresh				

The RMR record opens. Click on the Edit button located at the upper right of the page.

< RMR 11131 Emily Wood								Ø Edit	3 History
Monthly Amount \$35.00 Original Cycle Amount \$0.00	Cycle Amount \$35.00 Cuantity Rate \$0.00	Original Monthly Amount	item Description Invoice In Arrears Do Not Prorate Use Cycle Amount Oty Based Billing Include Memo	Monitoring Services	Activation Date RMR Cycle Start Date Next invoice Date Last invoice Date Cancellation Date Custom Date Billing Cycle	March 7, 2022 March 1, 2022 March 1, 2022 Monthly	RMR Group P.O. Number Deferred Posting Day Discount	Non-Arrears - 1	
Tracking Custo	m Fields Royaltie	s/Commissions							

The RMR record opens in edit mode. Once the RMR record is in edit mode, click the Delete button located at the upper right of the page.

RMR 11132 Emily Wood					Sava X Cance	Cancel RMR
Monthly Amount \$12.00 Cryste Amount \$12.00 Original Monthly Amount \$0.00 Original Cryste Amount \$0.00 Cuantity Rate \$0.00	Item - Description sice In Arrears to Not Prorate Cycle Arrount Based Billing Include Memo Memo	Maint Agreement Maintenance Agreement 2015 orr orr	Activation Date - RMR Cycle Start Date Next Invoice Month Last Invoice Date Custom Date Billing Cycle - Recurring Reason - RMR Croup P.O. Number Deferred Posting Day -	3/7/2022 3/1/2022 3/1/2022 MontNy New Sale Non-Arrears 1	Discount item	\$12.00 \$12.00 \$0.00

A confirmation message opens. Click the Yes button to proceed with the deletion of the record.

