Edit System RMR

Last Modified on 12/12/2024 2:48 pm EST

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.

ustomers Site	es Systems							
Search Customers	Add Customer	Export to Excel			Master Cust	omers NO Te	erminated Customers	Custom Grid Layout
Drag a column header	r and drop it here to group by the	it column						
Customer # 🕴 :	Name		Address	1	City :	State :	Balance Due :	Total RMR
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron		123 Main St		Columbus	ОН	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00
3499	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00
3498	Crafted Crates		233 Widmore Ave		Columbus	он	\$222.56	\$30.00

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

Cactus World Customer #3652 (Active) Normal Commercial - Since 12/5/21							🧨 Edit	¥≘ Tasks	🔊 History	
Total Balance Due Total RMR \$0.00 \$0.00		Address Phone	3601 Sagua Tucson, AZ (888) 234-8	85773		Salespersor Last Statement		a		
Customer Aging		Cell Email Comments		oldgroup.com egration test		Default Term Delivery Methoo Delivery RMR Inv	1 Print			
- Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+										
Invoices Credits Sites/Systems FMR Work Orders 0 0 1/2 1 0	Proposals Payment 0 0	is CC/eCheck	Notes 0	Contacts 3	Documents	Archive	Custom Fields	eForms	Emai 🕨	
+ Generate Recurring Invoice + Now RMR								ND Show Car	celled RMRs	
RMR # : Item C : Description	Billing Cycle	÷	Next Invoid	ce Date	: c	ancellation Date	1	Mo_ :	су :	
Invoice: To Customer System: #3652-01 - Burglar Alarm Billing: In Advance										
Monitoring Monitoring Services	Monthly		3/1/22, 5:0	00 AM				\$55.00	\$55.00	
н (1) н							1-10	f1items 🕄	Refresh	

The RMR record is displayed. Click the **Edit** button located at the upper right of the page.

< RMR 11131 Emily Wood								Sedit	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 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 Royalties/	Commissions							

The RMR record opens in edit mode. Make the necessary changes, and then click the **Save** button when finished.

< RMR 11131					🔗 Save	X Cancel X Cancel RMR	🗑 Delete
Emily Wood							
Monthly Amount \$35.00 Cycle Amount	Item • Description	Monitoring v	Activation Date •	3/7/2022			▼ 9 \$35.00 \$
\$35.00	Description	19/500	Next Invoice Month	3/1/2022	Cycle Amount		\$35.00
Original Monthly Amount	Invoice In Arrears	OFF Ø	Last Invoice Date	** 	Default Cost		\$0.00
\$0	Do Not Prorate	OFF Ø	Custom Date	Ë			
Original Cycle Amount	Use Cycle Amount	OFF Ø	Billing Cycle •	Monthly			
Quantity Rate	Oty Based Billing	OFF Ø	Recurring Reason •	New Sale 🔻			
\$0.00	Include Memo	OFF Ø	RMR Group	Non-Arrears 🔻]		
	Memo		P.O. Number]		
		0/500	Deferred Posting Day •	1			