Delete System RMR

Last Modified on 12/12/2024 2:46 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.

ustomers Site	es Systems							
Search Customers Q + Add Customer 🚯 Export to Excel								Custom Grid Layout
Drag a column header	and drop it here to group by tha	t 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 delete.

Cactus World Oustomer #3652 (Active) (Normal) Commercial - Since 12/5/21					🖋 Edit 🚝	Tasks	😗 History
Total Balance Due Total RMR \$0.00 \$0.00 Customer Aging 12 1 0 0 0 0 0 0 0 0 0 0 0 0 0		Address Phone Ceil Email	3601 Saguaro Street Tucson, A2 85773 (888) 234-8765 theresa@boldgroup.com Stages Integration test	Salespers Last Statem Default Te Delivery Meth Delivery RMR I	nt m od Print		
Invoices Credits Sites/Systems RMR Work Orders 0 0 1/2 1 0	Proposals Payment 0 0	ts CC/eCheck	Notes Contacts 0 3	Documents Archive	Custom Fields	eForms	Emai 🕨
Generate Recurring Invoice Annow RMR RMR # 1 Item C. 1 Description Invoice: To Customer System: #3652-01 - Burglar Alarm	: Billing Cycle	1	Next Invoice Date	: Cancellation Date		Show Canc Mo_ 1	Cy
Monitoring Services	Monthly		3/1/22, 5:00 AM			\$55.00	\$55.00
					1-1of1it	ems P	Refresh

The RMR record opens. Click 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						Save X Cancel	X Cancel RMR	Tokoto
Monthly Amount \$12.00 Cycle Amount \$12.00 Chighail Monthly Amount \$0.00 Chighail Cycle Amount \$0.00	Item - Description nvoice in Arrears Do Not Prorate e Cycle Amount 2ty Based Billing Include Memo Memo	0 01 0 01 0	Last Invoice Date Custom Date Billing Cycle • Recurring Reason • RMR Group P.O. Number	3/1/2022 3/1/2022 Monthly New Sale Non-Arrears	Monthly	Amount •		\$12.00 \$12.00 \$12.00 \$0.00

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

