Cancel System RMR

Last Modified on 12/12/2024 2:43 pm EST

A User is able to cancel an RMR record only if the User has permissions to edit 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.

Customers								
Customers Site	s Systems							
Search Customers	Add Customer	Export to Excel			Master Cus	tomers NO Te	erminated Customers	Custom Grid Layout
Drag a column header a	and drop it here to group by tha	t column						
Customer # 🕴 🚦	Name	1	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
<u>3498</u>	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00
4	H 4 1 2 + H 1-100 of 178 items 2 Refresh							erns 🔗 Refresh

The Customer record opens. Click on the RMR tab. A list of RMR's attached to the Customer are listed in the grid area. Click on the hyperlink to the left of the RMR you want to cancel.

Cactus World Customer #3652 (Active) (Normal) Commercial - Since 12/5/21			🧨 Edit	Æ Tasks [™]) History		
Total Ealanna Due Total RMR \$0.00 \$0.00	Address 3601 Sagu Tucson, A Phone (888) 234	iaro Street Z 85773 -8765	Salesperson Theresa Scalia Last Statement				
Customer Aging 12 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Cell Email theresa@ Comments Stages In	baldgroup.com tegration test	Default Term Delivery Method Print Delivery RMR Inv				
- Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+							
Invoices Credits Sites/Systems RMR Work-Orders Proposels P 0 0 1/2 0 0	ayments CC/eCheck Notes 0 0	Contacts Documents 3	Archive Custom Fields	eForms	Emai 🕨		
+ Cenerate Recurring Invoice + New FMR				D Show Cancelled	d RMRs		
RMR # i Item C. i Description i Billing Cycle	: Next Invo	oice Date : Cano	cellation Date	Мо і Су	. :		
V Invoice: To Customer V System: #3652-01 - Burglar Alarm							
V Billing: In Advance							
Monitoring Monitoring Services Monthly	3/1/22, 5	:00 AM		\$55.00 \$5	55.00		
н 4 <mark>1</mark> ж н			1 - 1 of	litems C ^{l Refi}	fresh		

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

< RMR 11131 Emily Wood 								Calt	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 RIMR 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 PO. Number Deferred Posting Day Discount	Non-Arrears - 1	
Tracking Custo	m Fields Royaltiec	s/Commissions							

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

< RMR 11132					Save Save	X Cancel Cancel RMR
Emily Wood						
Monthly Amount	ltem •	Maint Agreement	Activation Date -	3/7/2022	Discount Item	· · Ø
Cycle Amount	Provide the	Maintenance Agreement	RMR Cycle Start Date	3/1/2022	Monthly Amount •	\$12.00 🗘
\$12.00	Description	21/50	Next Invoice Month	3/1/2022	Cycle Amount	\$12.00
Original Monthly Amount	Invoice In Arrears	OFF Ø	Last Invoice Date		Default Cost	\$0.00
Ş0. ₀₀	Do Not Prorate	OFF 0	Custom Date			
Original Cycle Amount	Use Cycle Amount	OFF Ø	Billing Cycle •	Monthly]	
Quantity Pata	Qty Based Billing	OFF Q	Recurring Reason -	New Sale 💌		
\$0.00	Include Memo	OFF 0	RMR Group	Non-Arrears 💌]	
	Memo		P.O. Number]	
		0/50	Deferred Posting Day •	1		

The RMR Cancel form opens. Enter the date on which the RMR will end. Select a Recurring Reason for the cancellation.

When finished, click the Save button at the bottom of the form.

RMR Cancel	×
Cancellation Date • 3/31/2022 Recurring Reason • Canc-Unhappy with Service	
Seve Cancel	

A confirmation message opens. Click the Yes button to proceed with the cancellation.

Please confirm	×
You are canceling this RMR in the Future, the RMI be invoiced through the cancellation date of 3/31 you sure this is what you would like to do?	R item will /2022. Are
Yes No	