Remove System RMR Cancellation

Last Modified on 12/12/2024 2:52 pm EST

You can to remove an RMR cancellation only if the original cancellation date has not passed and you have 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 that	t column								
Customer # ↓ :	Name	÷	Address	÷	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		
<u>3499</u>	Edwards Security		345 Main Street		Columbus	OH	\$221.47	\$55.00		
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00		
K < 1 2 ▶ K 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 shown in the grid area. Click on the hyperlink to the left of the RMR for which you want to remove a cancellation.

Cactus World Oustomer #3652 (Active) (Normal) Commercial - Since 12/5/21							J Edit	Tasks	3 History
Total Balance Due Total RMR \$0.00 \$0.00		Address Phone	3601 Sagua Tucson, AZ (888) 234-8	aro Street 85773 8765		Salespersor Last Statemen	n Theresa Scalia t		
Customer Aging 1 1 0 8 0 6 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		Cell Email © Comments	theresa@bo Stages Inte	oldgroup.com egration test		Default Tern Delivery Methor Delivery RMR In	Print		
0 - Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+									
Invoices Credits Sites/Systems RMR Work Orders Pro 0 1/2 1 0	oposals Payment 0 0	s CC/eCheck	Notes 0	Contacts 3	Documents	Archive	Custom Fields	eForms	Emai 🕨
+ Generate Recurring Invoice + New RMR								Show Can	celled RMRs
RMR # i Item C. i Description i	Billing Cycle	i	Next Invoid	ce Date	i c	ancellation Date	i	мо. :	су і
Monitoring Monitoring Services	Monthly		3/1/22, 5:0	MA 00				\$55.00	\$55.00
н н 1 н н							1-1of	l items	Refresh

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

< RMR 11131 Emily Wood								Sedit Color	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.Q. Number Deferred Posting Day Discount	Non-Arrears - 1	
Tracking Custo	m Fielda Royaltied	e/Commissions							

The RMR record is displayed in edit mode. Once the RMR record is in edit mode, click the **Remove Cancellation** button located at the upper right of the page.

< RMR 11132					📀 Savo	X Cancel
e Emily Wood						
Monthly Amount \$12.00	item •	Maint Agreement 💌	Activation Date •	3/8/2022	Discount Item	• 0
	Description	Maintenance Agreement	RMR Cycle Start Date	3/1/2022 E	Monthly Amount •	\$12.00 \$
Original Monthly Amount	Invoice In Arrears	077 0	Last Invoice Date	3/1/2022	Default Cost	\$0.00
ŞU	Do Not Prorate	OFF 😯	Custom Date	6	ð	
Original Cycle Amount	Use Cycle Amount	OFF 0	Billing Cycle •	Monthly		
Quantity Rate	Oty Based Billing	OFF 0	Recurring Reason -	New Sale		
\$0.00	Include Memo	OFF 0	RMR Group	Non-Arrears		
	Мето		P.O. Number]	
		0/500	Deferred Posting Day •	1		

The Remove RMR Cancellation form opens. Select the appropriate Recurring Reason for removing the cancellation, and then click the **Save** button at the bottom of the form.



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

