RMR Custom Fields

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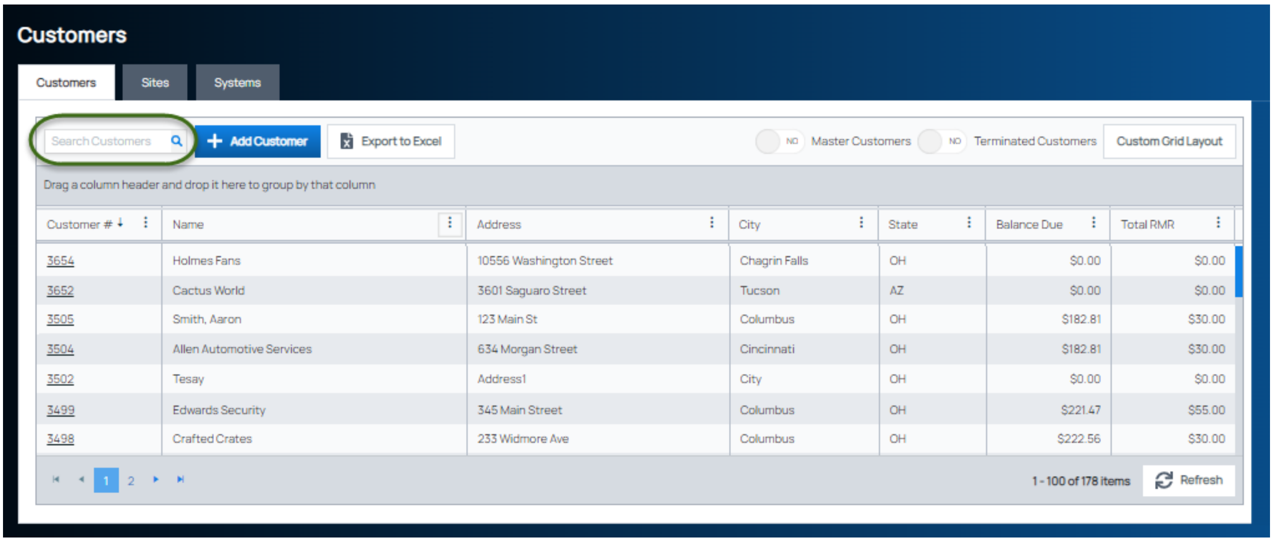
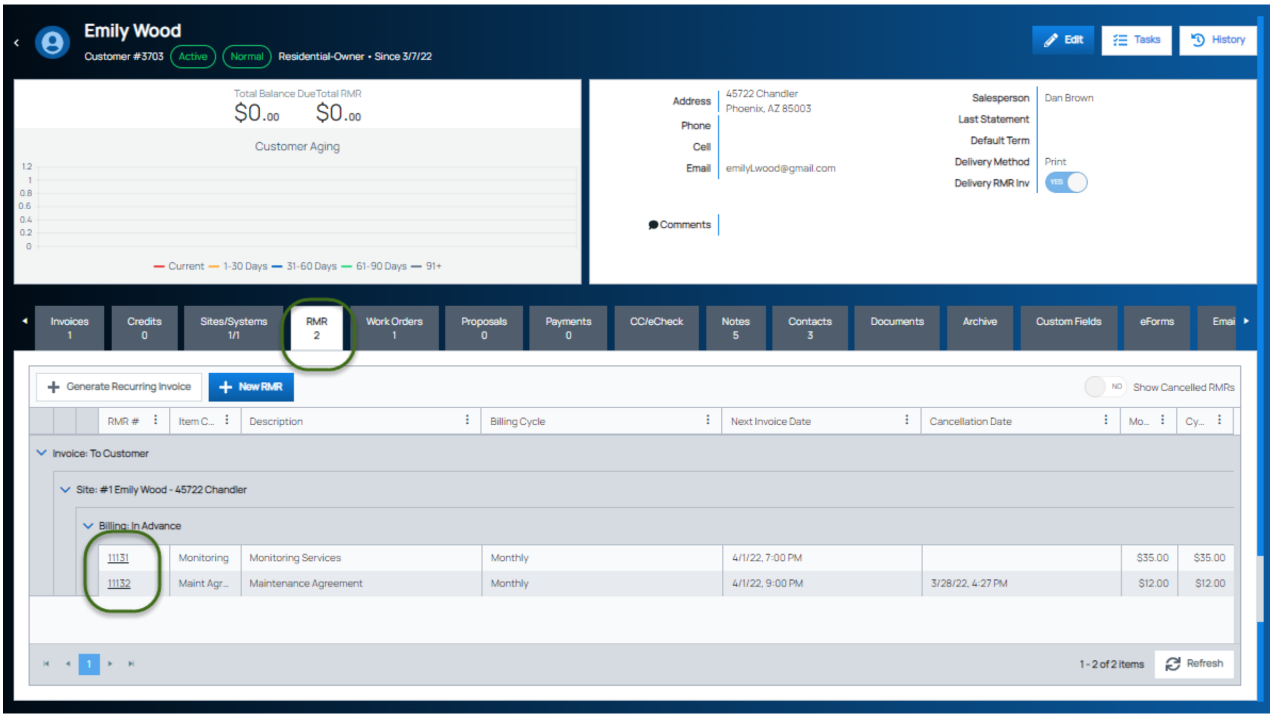
To access the RMR Custom Fields, you must first open a customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record will be displayed. Click on the RMR tab. A list of RMR's attached to the Customer will be listed in the grid area. Click on the hyperlink to the left of the RMR for which you want to access the custom fields.



The RMR record will be displayed. Click on the Custom Fields tab.

In the bottom panel of the page, the custom fields will be displayed. Enter information according to your company's policies and procedures.

When finished entering information, click on the Save button.