## **RMR Custom Fields**

Last Modified on 12/13/2024 4:57 pm EST

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 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	X Export to Excel			NO Master Cus	erminated Customers	Custom Grid Layout	
Drag a column header	r and drop it here to group by tha	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	OH	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	OH	\$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 listed in the grid area. Click on the hyperlink to the left of the RMR for which you want to access the custom fields.

Customer #3703 (Active) (Normal) Residential-Owner • Since 3/1/22						🧨 Edit	🔁 Tasks	🕲 History				
Total Balance Due Total RMR \$0.00 \$0.00	Address Phone		Salespers Last Stateme		Dan Brown							
Customer Aging	Cell Email emilyLwood@gmail.com			Default Term Delivery Method Delivery RMR Inv								
- Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+												
Invoices Credits Sites/Systems RMR 2 Work Orders     1 0 1/1 2 1	Proposals Payment 0 0	s CC/eCheck	Notes Conta 5 3	cts Document	is Archive	Custom Fields	eForms	Emai 🕨				
+ Cenerate Recurring Invoice + New RMR												
RMR # : Item C : Description	: Billing Cycle	:	Next Invoice Date	:	Cancellation Date	:	мо і	су :				
V Invoice: To Customer												
V Site: #1Emily Wood - 45722 Chandler												
V Billing: In Advance												
11131 Monitoring Manitaring Services	Monthly		4/1/22, 7:00 PM				\$35.00	\$35.00				
11132 Maint Agr Maintenance Agreement	Monthly		4/1/22, 9:00 PM		3/28/22, 4:27 PM		\$12.00	\$12.00				
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The RMR record opens. Click on the Custom Fields tab.

In the bottom panel of the page, the custom fields are displayed. Enter information according to your company's

## policies and procedures.

When finished entering information, click on the Save button.

< RMR 11131  Emily Wood								🧳 Edit	🔊 History
\$35.00 \$3 Original Cycle Amount Oua	cle Amount 35.00 antity 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	April 8, 2022 April 1, 2022 April 1, 2022 March 1, 2022 Monthly	RMR Group P.O. Number Deferred Posting Day Discount	Non-Arrears - 1	
Tracking Custom Field Ratelincrease? RatelincreaseDate	ds Royaties/C	Commissions					Nistory	Save Save	X Cancel
Tracking	Sustom Fields	Royalties/Cor	nmissions				🕚 History 📀 S	we >	Cancel
Rateinc Rateincrea		orr onth/day/year	and N						