

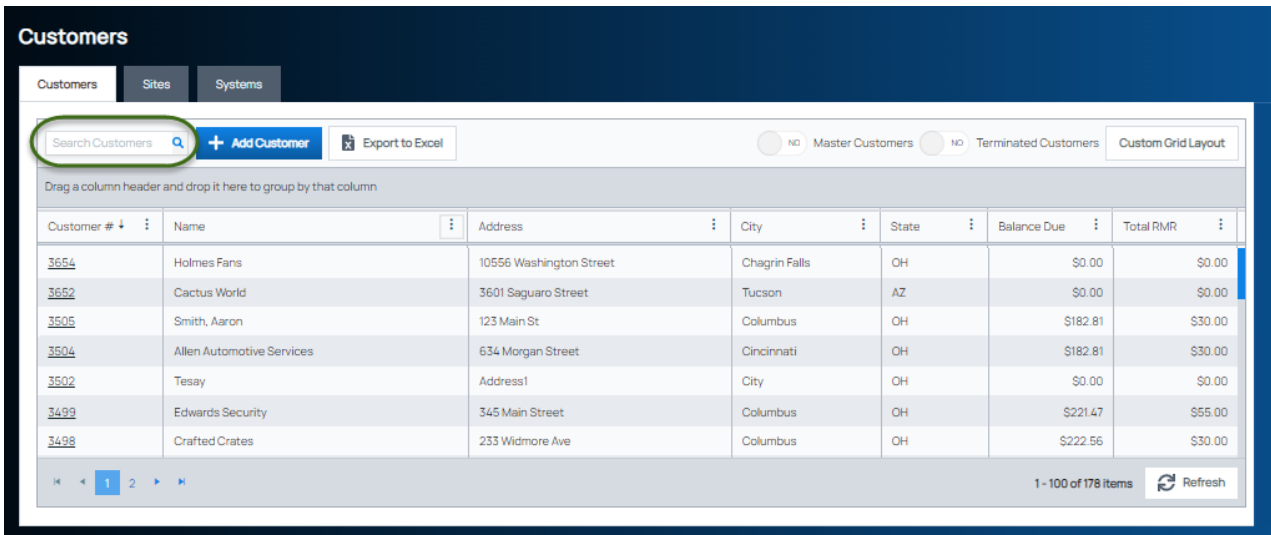
RMR Custom Fields

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

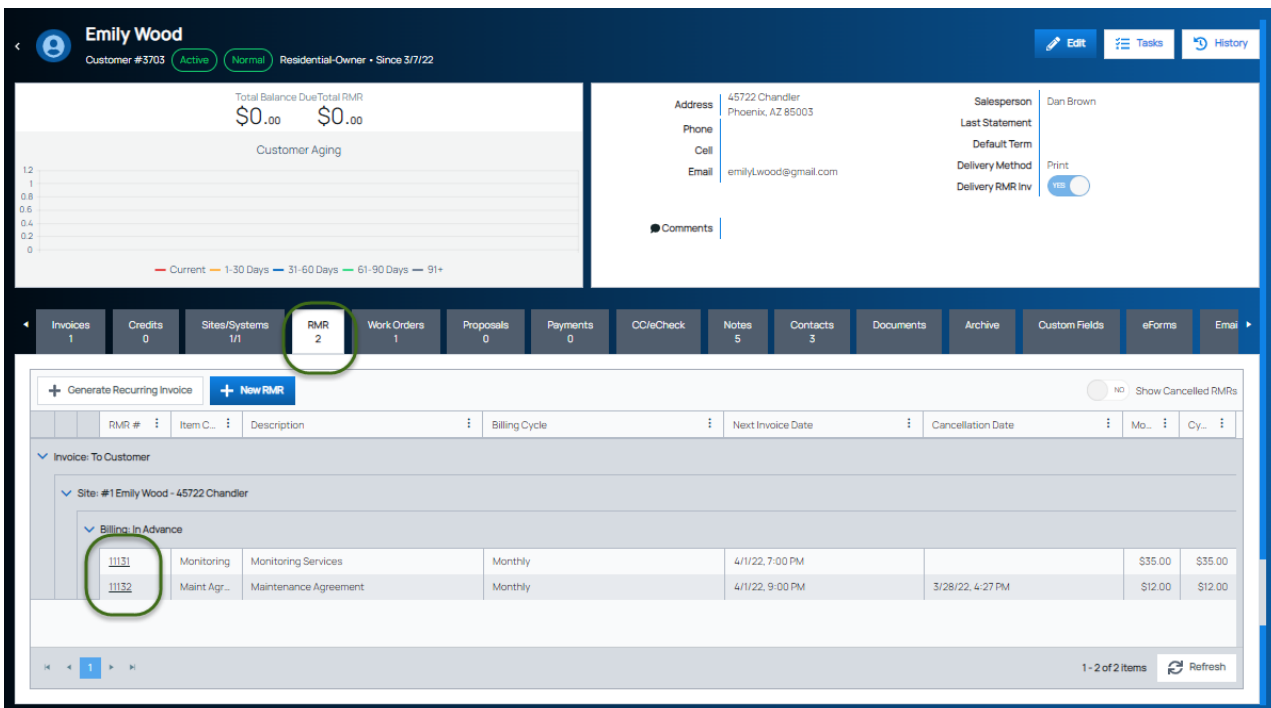
To access the RMR Custom Fields, you must first open a customer record.

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.



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.



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 Edit History

Emily Wood

Monthly Amount \$35.00	Cycle Amount \$35.00	Original Monthly Amount \$0.00	Item Description Monitoring Services	Activation Date April 8, 2022	RMR Group Non-Arrears
Original Cycle Amount \$0.00	Quantity Rate \$0.00		Monitoring Services	RMR Cycle Start Date April 1, 2022	P.O. Number -
			Invoice In Arrears <input type="radio"/> NO	Next Invoice Date April 1, 2022	Deferred Posting Day 1
			Do Not Prorate <input type="radio"/> NO	Last Invoice Date March 1, 2022	Discount -
			Use Cycle Amount <input type="radio"/> NO	Cancellation Date	
			Qty Based Billing <input type="radio"/> NO	Custom Date	
			Include Memo <input type="radio"/> NO	Billing Cycle Monthly	

Tracking **Custom Fields** Royalties/Commissions

History Save Cancel

RateIncrease? OFF

RateIncreaseDate

Tracking **Custom Fields** Royalties/Commissions

History Save Cancel

RateIncrease? OFF

RateIncreaseDate