Add RMR Custom Fields

Last Modified on 12/12/2024 2:31 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	Custom Grid Layout		
Drag a column header	r 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
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00

The Customer record opens. Click on the RMR tab. A list of RMR's 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 3/7/22						🖋 Edit	¥⊒ Tasks	🕲 History			
Total Balance DueTotal RMR \$0.00 \$0.00		Address Phone	45722 Chandler Phoenix, AZ 85003		Salesperse Last Stateme	nt					
Customer Aging		Cell Email Comments	emilyLwood@gmail.com		Default Ter Delivery Metho Delivery RMR I	od Print					
- Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+											
Invoices Credits Sites/Systems RMR 1 0 1/1 2 1	Proposals Payment 0 0	ts CC/eCheck	Notes Contacts 5 3	Documents	a Archive	Custom Fields	eForms	Emai 🕨			
+ Generate Recurring Invoice + New FMR											
RMR # : Item C : Description	Billing Cycle	:	Next Invoice Date	1	Cancellation Date	:	мо :	су :			
✓ Invoice: To Customer											
✓ Site: #1Emily Wood - 45722 Chandler											
V Billing in Advance											
11131 Monitoring Monitoring 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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K ≺ 1 → K 1-2of2items ♂ Refresh											

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 the **Save** button.

< RMR 11131 Emily Wood 							🥒 Edit	3 History
	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 Reids Royettes/Co RateIncrease? <u>cr</u> RateIncreaseDate <u>month/day/year</u>	ommissions T					History	Save	X Cancel
Tracking Custom Fields	Royalties/Con	nmissions			[🕥 History 📀 Se	we X	Cancel
	nth/day/year	**						