

RMR List

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The RMR page includes four tabs to display RMR records and transactional history pertaining to Rate Changes and RMR Invoice History. The last tab, Recurring Royalties/Commissions, is for future development.

Details on each of the tabs, and the two function buttons at the upper right of the page are described later in this article.

Creating a Rate Change batch is covered in a separate article.

The RMR Tab

The RMR tab displays a list of all active RMR. The default view displays the following columns within the grid area:

- RMR#
- Customer Name and Number
- Item Code
- Cycle
- Next Invoice Date
- Last Invoice Date
- Monthly Amount
- Cycle Amount

There are many other columns available to include in the grid area.

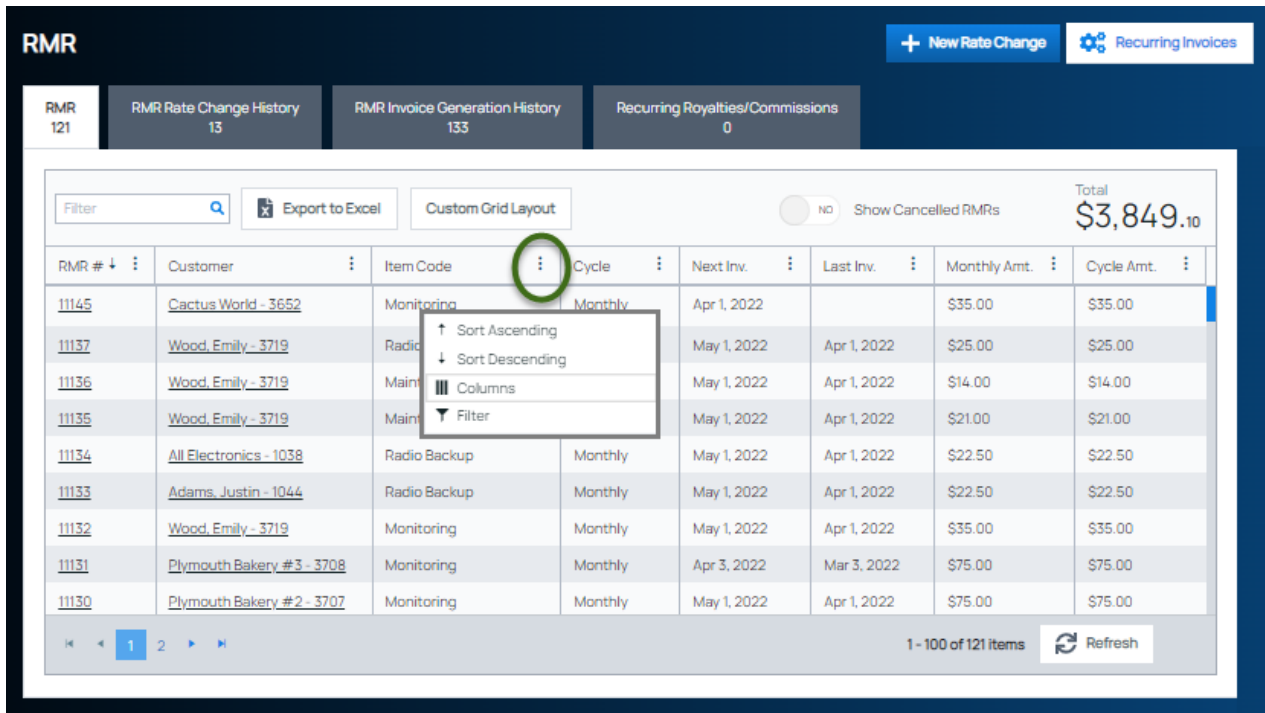
The screenshot shows the RMR List application interface. At the top, there are two buttons: "+ New Rate Change" and "Recurring Invoices". Below these are four tabs: "RMR 121", "RMR Rate Change History 13", "RMR Invoice Generation History 133", and "Recurring Royalties/Commissions 0". The main content area features a grid with a search filter, "Export to Excel", "Custom Grid Layout", and a "Show Cancelled RMRs" toggle. The total amount is displayed as \$3,849.10. The grid contains the following data:

RMR #	Customer	Item Code	Cycle	Next Inv.	Last Inv.	Monthly Amt.	Cycle Amt.
11145	Cactus World - 3652	Monitoring	Monthly	Apr 1, 2022		\$35.00	\$35.00
11137	Wood, Emily - 3719	Radio Backup	Monthly	May 1, 2022	Apr 1, 2022	\$25.00	\$25.00
11136	Wood, Emily - 3719	Maint Agreement	Monthly	May 1, 2022	Apr 1, 2022	\$14.00	\$14.00
11135	Wood, Emily - 3719	Maint Agreement	Monthly	May 1, 2022	Apr 1, 2022	\$21.00	\$21.00
11134	All Electronics - 1038	Radio Backup	Monthly	May 1, 2022	Apr 1, 2022	\$22.50	\$22.50
11133	Adams, Justin - 1044	Radio Backup	Monthly	May 1, 2022	Apr 1, 2022	\$22.50	\$22.50
11132	Wood, Emily - 3719	Monitoring	Monthly	May 1, 2022	Apr 1, 2022	\$35.00	\$35.00
11131	Plymouth Bakery #3 - 3708	Monitoring	Monthly	Apr 3, 2022	Mar 3, 2022	\$75.00	\$75.00
11130	Plymouth Bakery #2 - 3707	Monitoring	Monthly	May 1, 2022	Apr 1, 2022	\$75.00	\$75.00

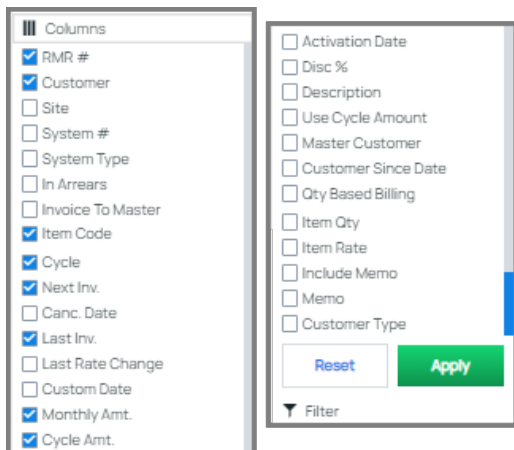
At the bottom, there is a pagination control showing "1 - 100 of 121 items" and a "Refresh" button.

Custom Grid Layout

Users have the ability to customize the grid layout. Clicking on the ellipse button on any of the column headers will display a list of options.



On the RMR List, the options are Sort Ascending, Sort Descending, Columns, and Filter. Clicking on the Columns option will display a list of all the available columns to display in the grid.



Once you have made selections, you may save the layout so that you do not have to repeat this process every time you open the RMR List.

In the example below, we want a view of the RMR List that includes the Activation Date and Customer Type, and want to save this layout for future use.

To save this layout, click on the Custom Grid Layout button in the header area of the grid.

RMR + New Rate Change Recurring Invoices

RMR 121 RMR Rate Change History 13 RMR Invoice Generation History 133 Recurring Royalties/Commissions 0

Filter Export to Excel Custom Grid Layout NO Show Cancelled RMRs Total \$3,849.10

RMR #	Customer	Item Code	Cycle	Next Inv.	Monthly Amt.	Cycle Amt.	Activation Date	Customer Type
8	Cocker, Alta - 1034	Monitoring	Monthly	Apr 1, 2022	\$37.50	\$37.50	2015-08-29	Residential-Owner
9	Waters, Roger - 1035	Monitoring	Monthly	Mar 1, 2022	\$99.00	\$99.00	2015-11-01	Residential-Owner
10	All Electronics - 1038	Maint Agreement	Quarterly	Mar 1, 2022	\$10.00	\$30.00	2015-11-30	Residential-Owner
11	Grossman, Matt - 1039	Monitoring	Monthly	Apr 1, 2022	\$22.50	\$22.50	2015-12-02	Residential-Owner
12	Grossman, Matt - 1039	Monitoring	Monthly	Apr 1, 2022	\$32.50	\$32.50	2015-12-02	Residential-Owner
13	Papay, Travis - 1028	Monitoring	Monthly	May 1, 2022	\$72.00	\$72.00	2015-10-01	Residential-Owner
10015	Patterson, Josh - 1052	Monitoring	Monthly	Apr 1, 2022	\$135.00	\$135.00	2017-01-24	Residential-Owner
11016	All Electronics - 1038	Maint Agreement	Quarterly	Apr 1, 2022	\$9.33	\$28.00	2017-07-26	Residential-Owner
11018	All Electronics - 1038	Monitoring	Monthly	Apr 1, 2022	\$160.00	\$160.00	2017-08-15	Residential-Owner

1 - 100 of 121 items Refresh

A dialog box will be displayed to enter the Name of the layout. There are two options for saving:

- **Save Layout** – If this option is selected, the custom layout will only be available to the logged-in user that created the layout.
- **Save As Global Layout** – Selecting this option will make the layout available to all users. Keep in mind, that if other users have access to this layout, they are able to make changes to the original layout.

Custom Grid Layouts - □ ×

Existing Layouts
Save New Layout

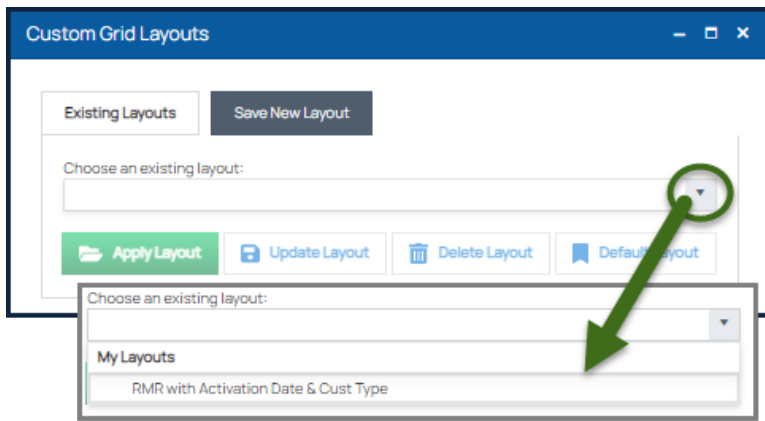
Name:

Save Layout
Save As Global Layout

If the user leaves the page displaying the Custom Grid Layout, and then returns, the default grid view will be displayed. To open a Custom Grid Layout, click on the Custom Grid Layout button at the upper right of the page.

The Custom Grid Layouts dialog box will be displayed. Click on the drop-down arrow in the “Choose an existing layout” field to locate the desired layout for viewing, and then click the Apply Layout button.

Once the grid is loaded, click on the Refresh button at the lower right of the page to refresh the data within the grid.



RMR List Function Buttons

At the upper right of the RMR List are two function buttons, and in the header area of the grid are four function buttons/options, each of which is described below.

- New Rate Change – Clicking this button opens the Rate Change page. This topic is covered under a separate article.
- Recurring Invoices – Clicking this button will open the Recurring Invoice Generation page. This topic is covered under a separate article.
- Filter – This is a search field to refine the list of displayed RMR records. This filter only works with text data. For example, I want to see all RMR records where the billing cycle is Monthly, typing monthly into this field will display only the RMR records with the monthly billing cycle.
- Export to Excel – Clicking on this button will export the current page of data displayed in the grid area. An Excel file icon will be displayed on your task bar to open the file for viewing.
- Custom Grid Layout – Allows users to create, update, and retrieve custom grid layouts. See the topic on this feature earlier in this article.
- Show Cancelled RMRs – Setting this toggle button to Yes will display a list of all previously cancelled RMR records.

The RMR Rate Change History Tab

The RMR Rate Change History tab displays a list of all RMR Rate Change batches that have been posted. Clicking on the "+" symbol to the left of a Batch Number will display all the RMR records which were included in that particular batch.

RMR + New Rate Change

RMR 121 | RMR Rate Change History 13 | RMR Invoice Generation History 133 | Recurring Royalties/Commissions 0

	Batch #	Reason	User	Run Date	\$ Rate Change
+	3151	Competitive Rate Reduction	Travis Papay	Mar 30, 2022	(\$1.00)
+	3148	Rate Increase	Travis Papay	Mar 28, 2022	\$3.00
+	3147	Rate Increase	Travis Papay	Mar 28, 2022	\$3.00
+	3142	Rate Increase	Travis Papay	Mar 18, 2022	\$1.00
+	2035	Rate Increase	Travis Papay	Oct 21, 2017	\$5.00
+	2025	Competitive Rate Reduction	Jeff Gaetjens	Sep 12, 2017	\$10.00
+	2022	Rate Increase	Travis Papay	Aug 15, 2017	\$10.00
+	2020	Rate Increase	Travis Papay	Aug 14, 2017	\$5.00
+	2018	New Sale	Travis Papay	Jul 17, 2017	\$5.00

1 - 13 of 13 items

The RMR Invoice Generation History Tab

The RMR Invoice Generation History tab displays a list of all RMR Invoice batches that have been posted. Clicking on the “+” symbol to the left of a RMR (Batch Number) will display all the RMR Invoices created in that particular batch.

RMR + New Rate Change

RMR 121 | RMR Rate Change History 13 | RMR Invoice Generation History 133 | Recurring Royalties/Commissions 0

Drag a column header and drop it here to group by that column

	RMR #	Username	Master	Run Date	Process Date	Count	Invoice Date	Funding Date
+	3161	Travis Papay	<input type="checkbox"/>	Apr 18, 2022	Apr 18, 2022	1	Apr 18, 2022	Apr 1, 2022
+	3160	Travis Papay	<input type="checkbox"/>	Apr 15, 2022	Mar 1, 2022	0	Mar 1, 2022	Mar 1, 2022
+	3159	Travis Papay	<input type="checkbox"/>	Apr 15, 2022	Mar 1, 2022	25	Mar 1, 2022	Feb 1, 2022
+	3158	Travis Papay	<input type="checkbox"/>	Apr 15, 2022	Feb 1, 2022	25	Feb 1, 2022	Jan 1, 2022
+	3157	Travis Papay	<input type="checkbox"/>	Apr 15, 2022	Apr 1, 2022	40	Apr 1, 2022	Apr 1, 2022
+	3156	Travis Papay	<input type="checkbox"/>	Mar 31, 2022	Mar 31, 2022	1	Mar 31, 2022	Mar 1, 2022
+	3145	Travis Papay	<input type="checkbox"/>	Mar 28, 2022	Apr 1, 2022	1	Mar 28, 2022	Apr 1, 2022

1 - 100 of 133 items