

# RMR List

Last Modified on 03/27/2025 5:10 pm EDT

The RMR page includes 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.

RMR #	Customer	Branch	Item Code	Roll Up Item Code	Cycle	Next Inv.	Last Inv.	Monthly Amt.	Cycle Amt.
3	Pacay, Travis - 1028		Maint Agreement		Monthly	Jul 1, 2023	Jun 1, 2023	\$0.00	\$0.00
4	Donoson, Bill - 1029		Monitoring		Monthly	Jul 28, 2024	Jun 28, 2024	\$33.25	\$33.25
5	Jones, Drew - 1030		Monitoring		Monthly	Aug 1, 2024	Jul 1, 2024	\$33.31	\$33.31
6	Parsons, Alan - 1033		Monitoring		Monthly	Aug 1, 2024	Jul 1, 2024	\$32.50	\$32.50
7	Pacay, Travis - 1028		Monitoring		Monthly	Jul 1, 2023	Jun 1, 2023	\$12.81	\$12.81
8	Cocker, Alta - 1034		Monitoring		Monthly	Aug 1, 2024	Jul 1, 2024	\$37.50	\$37.50
11	Crossman, Matt - 1039		Monitoring		Monthly	Aug 1, 2024	Jul 1, 2024	\$22.50	\$22.50
12	Crossman, Matt - 1039		Monitoring		Monthly	Aug 1, 2024	Jul 1, 2024	\$32.50	\$32.50
13	Pacay, Travis - 1028		Monitoring		Monthly	Jul 1, 2023	Jun 1, 2023	\$72.00	\$72.00
10015	Patterson, Josh - 1052		Monitoring	Radio Backup	Monthly	Aug 1, 2024	Jul 1, 2024	\$135.00	\$135.00
11015	All Electronics - 1038		Maint Agreement		Quarterly	Sep 30, 2024	Jun 30, 2024	\$9.53	\$28.00
11018	All Electronics - 1038		Monitoring		Monthly	Aug 1, 2024	Jul 1, 2024	\$160.00	\$160.00
11020	DeBaggis, Justin - 1041		Maint Agreement		Monthly	Aug 1, 2024	Jul 1, 2024	\$25.00	\$25.00
11021	Caetjens, Jeff - 1064		Maint Agreement		Monthly	Jul 1, 2024	Jun 1, 2024	\$60.00	\$60.00
11022	Caetjens, Jeff - 1064		Monitoring		Semi-Annual	Sep 1, 2024	Mar 1, 2024	\$33.00	\$198.00
11023	Adams, Justin - 1044		Monitoring		Monthly	Aug 1, 2024	Jul 1, 2024	\$50.00	\$50.00
								Monthly Total:	\$60,022.20

## Custom Grid Layout

You can customize the grid layout. Clicking on the ellipse button on any of the column headers displays a list of options.

**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 Show Cancelled RMRs  Total \$3,849.10

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

1 - 100 of 121 items Refresh

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

**Columns**

- RMR #
- Customer
- Site
- System #
- System Type
- In Arrears
- Invoice To Master
- Item Code
- Cycle
- Next Inv.
- Canc. Date
- Last Inv.
- Last Rate Change
- Custom Date
- Monthly Amt.
- Cycle Amt.

- Activation Date
- Disc %
- Description
- Use Cycle Amount
- Master Customer
- Customer Since Date
- Qty Based Billing
- Item Qty
- Item Rate
- Include Memo
- Memo
- Customer Type

Reset Apply

Filter

Once you have made selections, 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 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    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 is displayed to enter the Name of the layout. There are two options for saving:

- **Save Layout:** If you select this option, the custom layout will only be available to the logged-in user that created the layout.
- **Save As Global Layout:** Selecting this option makes the layout available to all users. 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:

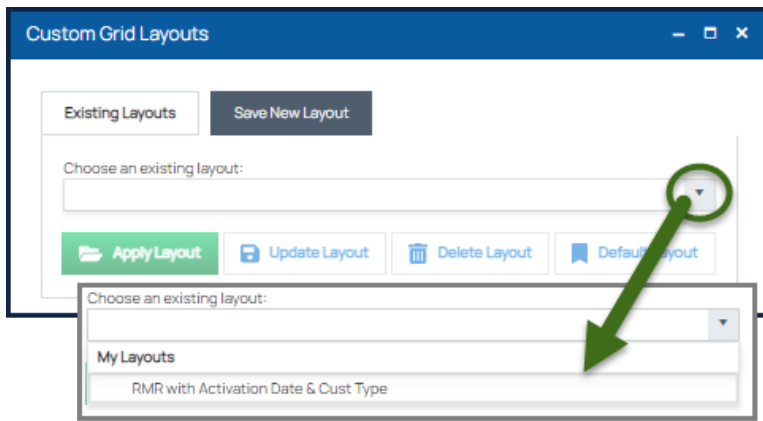
RMR with Activation Date & Cust Type

Save Layout    Save As Global Layout

If you leave the page displaying the Custom Grid Layout, and then return, the default grid view is displayed. To open a Custom Grid Layout, click the **Custom Grid Layout** button at the upper right of the page.

The Custom Grid Layouts dialog box opens. 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.

## Scheduled RMR Rate Changes

The Schedules RMR Rate Changes tab shows all scheduled rate changes. You can edit or delete the rate changes before they are applied on their effective date. You can expand the rate changes to show all associated RMRs that will be affected by the change.

RMR							+ New Rate Change	Recurring Invoices
RMR 305	Scheduled RMR Rate Changes 1	RMR Rate Change History 20	RMR Invoice Generation History 262	Recurring Royalties/Commissions 40				
Rate Change #	Effective Date	Rate Change Amount	Reason Code	Is Percent	Exclude RMRs from last day(s)			
1	3/26/25	1%	Rate Increase	<input checked="" type="checkbox"/>				
Drag a column header and drop it here to group by that column								
RMR #	Customer Name	Billing Cycle	Cycle Amount					
13339	20024, Test 0117 - 4423	Monthly	\$96.00					
13341	20024, Test 0117 - 4423	Quarterly	\$3,000.00					
13342	20024, Test 0117 - 4423	Quarterly	\$3,000.00					
1 - 3 of 3 items								

## 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.

The screenshot shows the RMR Rate Change History tab. The top navigation bar includes 'RMR 305', 'Scheduled RMR Rate Changes 1', 'RMR Rate Change History 20', 'RMR Invoice Generation History 262', and 'Recurring Royalties/Commissions 40'. There are also buttons for '+ New Rate Change' and 'Recurring Invoices'. The main table has a header 'Drag a column header and drop it here to group by that column' and the following columns: Batch #, Reason, User, Run Date, and \$ Rate Change. The table contains 10 rows of data, each with a '+' icon in the first column.

Batch #	Reason	User	Run Date	\$ Rate Change
+ 4235	Upgrade	Ashlee Simmons	Apr 5, 2023	\$2.00
+ 4225	Upgrade	Jesslynn Lupo	Feb 1, 2023	\$3.00
+ 4219	Rate Increase	Accounting Manager	Jan 12, 2023	\$3.00
+ 4202	Rate Increase	Accounting Manager	Dec 27, 2022	\$45.99
+ 4200	Rate Increase	Accounting Manager	Dec 27, 2022	\$10.00
+ 3170	Upgrade	Thomas Utley	Jul 6, 2022	\$10.00
+ 3165	New Sale	Thomas Utley	May 27, 2022	\$4.00
+ 3151	Competitive Rate Reduction	Thomas Utley	Mar 30, 2022	(\$1.00)
+ 3148	Rate Increase	Thomas Utley	Mar 28, 2022	\$3.00

## 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.

The screenshot shows the RMR Invoice Generation History tab. The top navigation bar includes 'RMR 305', 'Scheduled RMR Rate Changes 1', 'RMR Rate Change History 20', 'RMR Invoice Generation History 262', and 'Recurring Royalties/Commissions 40'. There are also buttons for '+ New Rate Change' and 'Recurring Invoices'. The main table has a header 'Drag a column header and drop it here to group by that column' and the following columns: RMR #, Username, Master, Run Date, Process Date, Count, Invoice Date, and Funding Date. The table contains 10 rows of data, each with a '+' icon in the first column.

RMR #	Username	Master	Run Date	Process Date	Count	Invoice Date	Funding Date
+ 4258	Managely Managely	<input type="radio"/> NO	Sep 25, 2023	Oct 2, 2023	85	Oct 1, 2023	Oct 1, 2023
+ 4257	Managely Managely	<input type="radio"/> NO	Aug 25, 2023	Sep 2, 2023	80	Sep 1, 2023	Sep 1, 2023
+ 4256	Thomas Utley	<input type="radio"/> NO	Aug 2, 2023	Sep 2, 2023	1	Sep 1, 2023	Sep 1, 2023
+ 4255	Managely Managely	<input type="radio"/> NO	Jul 25, 2023	Aug 2, 2023	82	Aug 1, 2023	Aug 1, 2023
+ 4254	Kathy Ackerman	<input type="radio"/> NO	Jul 18, 2023	Aug 2, 2023	1	Aug 1, 2023	Aug 1, 2023
+ 4253	Kathy Ackerman	<input type="radio"/> NO	Jul 18, 2023	Jul 2, 2023	1	Jul 1, 2023	Jul 1, 2023
+ 4252	Kathy Ackerman	<input type="radio"/> NO	Jul 17, 2023	Feb 2, 2023	2	Feb 1, 2023	Feb 1, 2023
+ 4251	Kathy Ackerman	<input type="radio"/> NO	Jul 17, 2023	Jan 2, 2023	1	Jan 1, 2023	Jan 1, 2023

## Recurring Royalties/Commissions

The Recurring Royalties/Commissions tab shows royalties and commissions that have been added to RMR. Read [Recurring Royalties and Commissions \(Pro\)](#) for more information.