Edit a Recurring Reason

Last Modified on 04/27/2022 8:05 pm EDT

To edit a Recurring Reason, from the main menu, arrive at the Recurring Reasons setup with this path: Setup > Other > Recurring Reasons.

The Recurring Reasons list will be displayed. Locate the Recurring Reason you want to edit, and then click on the Edit button (pencil icon).

+ Add Recurring Reason	NO Show inactive recurring reasons	
Name	: Action	
New Sale	🖉 Edit 🕽 🛱 Delete	
Upgrade	Selete	
Takeover	🖋 Edit 🛅 Delete	
Canc-Moved Out of Market	🖋 Edit 🛅 Delete	
Customer Moved	🖋 Edit 🛅 Delete	

Users should not change the definition of an existing Recurring Reason, as it may have been selected on existing RMR records. The only reason to edit code would be due to the text presentation.

The Recurring Reason Edit form will be displayed. Make the necessary changes, and then click the Save button when finished.

Recurring Reason Edit			×
Name •	Canc-Moved (
	Save	Cancel	