

RMR Generation

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RMR Generation generates recurring invoices every month.

If you want to run your RMR prior to invoicing, follow the steps below:

1. Navigate to Setup > Utilities > Automation
2. Toggle RMR Generation to **ON**
3. Complete the information below:
 - **Run on the:** Select the day of the month you want RMR to run.
 - **RMR Next Invoice for:** Select **Next Month** for invoices coming up.
 - **Invoice Date is the:** Defaults to the 1st; choose your invoice date.
 - **day of:** Select **Next Month**.
4. Click **Save** at the top of your screen.

The example below shows that RMR will run on 7/25/2023 for the next invoice date of 8/1/2023.

The screenshot shows the 'Automation' settings page. On the left is a 'Setup' sidebar with a search bar and a list of categories: Company, Accounting, Operations, Items & Parts, Utilities (expanded), Uploaders, Exports, Tasks, Proposals, Other, and eForms. Under 'Utilities', 'Automation' is selected. The main content area is titled 'Automation' and contains three sections: 'Expiring Credit Card Summary' (OFF), 'Invoice/Credit Delivery' (ON), and 'RMR Invoice Delivery' (OFF). The 'RMR Generation' section is active (ON) and includes the following settings: 'Run on the' set to '25', 'th day of the month', 'RMR Next Invoice for' set to 'Next Month', 'Invoice Date is the' set to '1', and 'st day of' set to 'Next Month'. At the bottom, summary dates are displayed: 'Next RMR Run Date: 07/25/2023', 'RMR Next Invoice Date: 08/01/2023', 'Invoice Date: 08/01/2023', and 'Next CC/eCheck Funding Date: 08/xx/2023'.