

RMR Roll-Up Item in Managely

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Roll up item (Managely)

In this case, the Dealer wants to charge their customer a monitoring charge + another fee and keep the invoice information as simple as possible to avoid confusion. Here we would recommend using the new roll up item feature. Below we will be using the RMR items Monitoring and convenience fee and the roll up item Residential Monitoring

1) Log into the customers page in question, click on the RMR tab below, create the convenience fee RMR as shown below.

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2) Now create the monitoring RMR as shown below (again selecting Residential Monitoring as the roll up item)

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3) Once the RMR invoice is generated, instead of having two line items (one for the convenience fee and one for the monitoring) these will be “rolled up” into the Residential Monitoring item with the totals of both RMR’s.

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