New Customer: Recurring Tab

Recurring Monthly Revenue (RMR)

This will be where you will fill out the information about the monitoring expenses the customer will have to pay associated with the system that was installed. (You can also add RMR at the site level, but normally the RMR will be associated with the system that is associated with the monitoring)

Fill out the fields in the Customer Recurring tab. Additional recurring items can be added once you finish creating the customer.

Create RMR

Select this checkbox to create an RMR for this customer

Note: If this customer's status is listed as a Prospect under the Customer Status field, the following recurring information will be
for viewable purposes only. IT WILL NOT BE AN ACTIVE RECURRING ITEM FOR PROSPECTS. The customer must have a Customer Status of Active
for a recurring item to be generated.

Item

Select the type of recurring item from the dropdown. You can set these up in your setup, under items. Just be sure that while creating the item, before you complete creating it, select the checkbox labeled recurring.

Description

This is an area in which you can place information that will help you specify certain things for RMR. It is only for your business to see.

Invoice to Master

Select this checkbox If this customer is linked to a master customer and you would like to bill the RMR to the master.

Invoice in Arrears

Select this checkbox if you want the invoices to be generated at the end of the billing cycle instead of the beginning of the cycle. (For example: You have a customer set up to be billed monthly. Let's say its October. Instead of this customer getting their invoice on October 1st for October monitoring, they would receive their invoice October 31st for October monitoring.)

Do Not Prorate

AlarmBiller defaults to prorating the first month of recurring. Select this checkbox if you do not want to prorate your first month of billing. (Prorating means to charge for a partial month).

Use Cycle Amount

Read billing cycle, monthly amount, and cycle amount before you read this. Choose between typing either a monthly amount that you will charge your customer, or cycle amount. If your billing cycle is set to monthly, it will not matter whether you use the cycle amount or monthly amount for how much you will charge them, because they will be the same. If you are using anything other than monthly, you most likely will want to use cycle amount.

For example: Your customer is on a quarterly billing cycle and you want to charge him/her $100.00 per quarter. If you do not select the Use Cycle Amount checkbox to type in that amount, you will have to type 33.33 per month, which still will not give you exactly $100.00.

Billing Cycle

Select the billing cycle for this recurring item using the dropdown box.

Discount

If you are offering a discount for this recurring item, choose the discount from the dropdown box and input the monthly discount percentage. Original Monthly and Original Cycle fields will appear.

Original Monthly

Input how much you would normally charge for this recurring item before the discount is applied.

Original Cycle

This is the original monthly amount multiplied by the number of months in the Billing Cycle you chose (this will be automatically calculated after you input Original Monthly).

Monthly Amount

How much you are charging the customer monthly for this recurring item (with a discount included if applicable).

Cycle Amount

How much you are charging the customer for each billing cycle (the monthly amount multiplied by the number of months in the cycle). AlarmBiller will calculate this for you automatically after the Monthly Amount field is filled out.

Activation Date

This is often confused with the date the customer becomes active. This date should be the date that you would like to start charging the customer. It is also used to define how much the invoice will be prorated for.

For example: You are creating a new customer whose monitoring started at the beginning of August. Therefore you would like to start charging them beginning August 1st, so that will be your Activation date and because you are charging them for the whole month, the invoice will not be prorated. Let's say the monitoring didn't start until August 7th, this would be the day you would put for the activation date and the invoice would then be prorated from August 7th until the end of August, meaning they would only be charged from the 7th through the end of the month. Maybe you would like to give them half of this month for becoming a new customer, in which case you would make the activation date August 15th, and the customer would then only be charged from the 15th through the end of the month.

Next Invoice Date

The word 'next' is often confusing to customers, as it makes people think that this date should be when we want to create our next invoice for the customer. The Next Invoice Date is the actual month you want to start charging the customer. This date will always be the first of the month, as it is only indicating which month you want to charge for.

> Continuing Example from Activation Date above: In all of these cases, our next invoice date should be August 1st, because we want to start charging our customer in August. Whether we are prorating or not, August 1st is the date we need for next invoice date if we want to charge our customer for August.

Cancellation Date

Recurring Reason

P.O. Number

Last Invoice Date

Custom Date

Include Memo

Submit

Click Submit in the upper right corner to finish creating the customer. This will take you to the Customer Manager Page. See the Customer Manager Page article for more information.