

# RMR Tab

Last Modified on 11/07/2016 2:31 pm EST

RMR stands for recurring monthly revenue. The RMR tab in the customer manager page shows you a list of recurring items linked to this customer's system(s) and/or site(s):

**RMR** Generate Recurring Invoice New RMR

Show Cancelled RMR's

RMR#	Item Code	Description	Cycle	Next Inv.	Canc. Date	Monthly \$	Cycle \$
Invoice: To Customer							
System: #123 - Burglar Alarm							
Billing: In Advance							
1209	Monitoring	Monitoring	M	09/01/2016		\$30.00	\$30.00
System: #555 - Burglar Alarm							
Billing: In Advance							
1268	Monitoring	Monitoring	M	09/01/2016		\$27.00	\$27.00

## New RMR

to add a new RMR for this customer, click "New RMR" on the right side of the page.

**RMR** Generate Recurring Invoice New RMR

Show Cancelled RMR's

RMR#	Item Code	Description	Cycle	Next Inv.	Canc. Date	Monthly \$	Cycle \$
Invoice: To Customer							
System: #123 - Burglar Alarm							
Billing: In Advance							
1209	Monitoring	Monitoring	M	09/01/2016		\$30.00	\$30.00
System: #555 - Burglar Alarm							
Billing: In Advance							
1268	Monitoring	Monitoring	M	09/01/2016		\$27.00	\$27.00

Fill out fields (hyperlink), and click "Save" in the upper right corner to update. The RMR Details Page will appear.

## RMR Details Page

From the Customer Manager Page, click the blue number hyperlink to the left of the recurring item you would like to access.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
24	3	7	20	24	4	110	87	6	7	5	0

  

RMR											Generate Recurring Invoice	New RMR
											<input type="checkbox"/> Show Cancelled RMR's	
	RMR#	Item Code	Description	Cycle	Next Inv.	Canc. Date	Monthly \$	Cycle \$				
Invoice: To Customer												
System: #123 - Burglar Alarm												
Billing: In Advance												
	<a href="#">1209</a>	Monitoring	Monitoring	M	09/01/2016		\$30.00	\$30.00				
System: #555 - Burglar Alarm												
Billing: In Advance												
	<a href="#">1268</a>	Monitoring	Monitoring	M	09/01/2016		\$27.00	\$27.00				

A dashboard of information about the RMR will appear.

## Customer: Matt Grossman - 1028

[Customer](#)[Back to System](#)[Edit](#)

**Item:** Monitoring  
**Description:** Monitoring  
**P.O. Number:**  
**Invoice In Arrears:** No  
**Activation Date:** 06/10/2015 Prorate: Yes  
**Next Invoice Date:** 09/01/2016  
**Last Invoice Date:** 08/01/2016  
**Cancellation Date:**  
**Custom Date:**

**Use Cycle Amount:** No  
**Billing Cycle:** Monthly  
**Monthly Amount:** \$30.00  
**Cycle Amount:** \$30.00

**Include Memo:** No

**Memo:**

### RMR Tracking Data:

Tracking Date ▼	Created Date (EST) ▼	Recurring Reason ▼	RMR Net Amount ▼
06/10/2015	06/10/2015 11:17:16	New Sale	\$30.00
			<b>Total: \$30.00</b>

## Edit

to edit the RMR click edit in the upper right corner, edit fields as desired (hyperlink to new customer recurring page), and click "Save" in the upper right corner to update.

## Customer: Matt Grossman - 1028

[Customer](#)[Back to System](#)[Edit](#)

**Item:** Monitoring  
**Description:** Monitoring  
**P.O. Number:**  
**Invoice In Arrears:** No  
**Activation Date:** 06/10/2015 Prorate: Yes  
**Next Invoice Date:** 09/01/2016

**Use Cycle Amount:** No  
**Billing Cycle:** Monthly  
**Monthly Amount:** \$30.00  
**Cycle Amount:** \$30.00

## Cancel RMR

If you would like to cancel this RMR, click "Edit" in the upper right corner then click "Cancel RMR" at the top of the page.

## Edit RMR: Matt Grossman - 1028

**Cancel RMR**

Back to RMR

Save

Item: Monitoring	Recurring Reason: New Sale
Description: Monitoring	P.O. Number:
Invoice In Arrears: <input type="checkbox"/> The invoice will be generated at the end of the cycle.	Last Invoice Date: 8/1/2016
Do Not Prorate: <input type="checkbox"/> Billing will start based on the Next Invoice Date.	Custom Date:

A Cancel RMR box will appear. Enter the date you wish the cancellation to occur, enter the recurring reason for cancelling to RMR and click "Save" in the bottom right corner to update:

**Cancel RMR**

Cancellation Date: 8/31/2016

Recurring Reason: New Sale

Save

\*Note: Once you cancel a recurring item, it cannot be reopened.

## Show Cancelled RMR's

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Check the "Show Cancelled RMR's" box on the right side of the page to view cancelled recurring items:

Invoices 24	Credits 3	Sites/Sys 7	RMR 20	Work Orders 24	Proposals 4	Payments 110	CC/eCheck 87	Notes 6	Contacts 7	Docs 5	Archive 0
<b>RMR</b>											
Generate Recurring Invoice											
New RMR											
<input type="checkbox"/> Show Cancelled RMR's											
RMR#	Item Code	Description	Cycle	Next Inv.	Canc. Date	Monthly \$	Cycle \$				
Invoice: To Customer											
System: #123 - Burglar Alarm											
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1209	Monitoring	Monitoring	M	09/01/2016		\$30.00	\$30.00				
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1268	Monitoring	Monitoring	M	09/01/2016		\$27.00	\$27.00				

# Generate Recurring Invoice

To generate recurring invoices for this customer click "Generate Recurring Invoice". The steps followed are identical to "Generate Recurring Invoices" in the Dealer-Level Invoices Page except invoices can only be processed for this customer [\(hyperlink\)](#)

The screenshot shows a software interface with a navigation bar at the top containing the following items: Invoices (24), Credits (3), Sites/Sys (7), RMR (20), Work Orders (24), Proposals (4), Payments (110), CC/eCheck (87), Notes (6), Contacts (7), Docs (5), and Archive (0). The 'RMR' tab is selected. Below the navigation bar, there is a sub-header 'RMR' and a button 'Generate Recurring Invoice' which is circled in purple. To the right of this button is a '+ New RMR' button. Below these buttons is a checkbox labeled 'Show Cancelled RMR's'. The main area contains a table with the following columns: RMR#, Item Code, Description, Cycle, Next Inv., Canc. Date, Monthly \$, and Cycle \$. The table is expanded to show two systems: 'System: #123 - Burglar Alarm' and 'System: #555 - Burglar Alarm'. Each system has a sub-section for 'Billing: In Advance' with one row of data.

RMR#	Item Code	Description	Cycle	Next Inv.	Canc. Date	Monthly \$	Cycle \$
Invoice: To Customer							
System: #123 - Burglar Alarm							
Billing: In Advance							
1209	Monitoring	Monitoring	M	09/01/2016		\$30.00	\$30.00
System: #555 - Burglar Alarm							
Billing: In Advance							
1268	Monitoring	Monitoring	M	09/01/2016		\$27.00	\$27.00