

Cancelling A Customer

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How do I delete a Customer?

This is a process that is essentially the reverse of the original flow of AlarmBiller. You will need to cancel any RMR; inactivate any systems; inactivate any sites; and then you can terminate the customer. (You will also need to get rid of any balances on the customer's account before terminating the customer, which you can find more information on by clicking here)

Step 1, cancel the RMR:

Open up the RMR by going to the customer manager's page; going to the RMR tab; and then opening the RMR:

The screenshot shows the ACME Alarms software interface. At the top left is the company logo and address: **ACME Alarms**, 5001 E. Main St., New York, NY 10011, (212) 555-1000. The top navigation bar includes a home icon, user 'Ben', 'Support Center', 'AlarmBiller' dropdown, and 'Logout'. Below this is a 'Customers' dropdown and a search field 'Customer Search: name - cust #'. A main menu contains 'Customers', 'Invoices', 'Payments', 'RMR', 'Work Orders', 'Proposals', 'Calendar', 'GL', 'Reports', 'Setup', and 'Accounting'. The main content area is for customer 'Bart Didden - 2034' with an 'Edit' button. Customer details include address (32432 Elm St, New York, NY 32422), phone (432) 432-4324, cell (342) 342-3242, email bart@security.com, customer type Residential, and salesperson Brad Solomon. Status is Active, Priority Normal, Customer Since 06/05/2017, Last Statement Term Due on Receipt, Delivery Method Email, Deliver RMR Inv Yes. Financials: Open Invoices \$0.00, Open Credits \$0.00, Unapplied Cash \$0.00, Balance Due \$0.00, Total RMR \$29.95, Auto Pay. Below this is a sub-menu with 'Invoices', 'Credits', 'Sites', 'RMR', 'Work Orders', 'Proposals', 'Payments', 'CC/eCheck', 'Notes', 'Contacts', and 'Utilities'. The 'RMR' tab is selected, showing a table with columns: RMR#, Item Code, Description, Cycle, Next Inv., Canc. Date, Monthly \$, Cycle \$. A red arrow labeled '1.' points to the 'RMR' tab. The table shows one row: RMR# 204, Item Code 204, Description Monitoring, Cycle M, Next Inv. 11/01/2017, Monthly \$ \$29.95, Cycle \$ \$29.95. A red arrow labeled '2.' points to the '204' in the RMR# column. The table is titled 'Invoice: To Customer' and 'System: #123456 - Burglar Alarm' with 'Billing: In Advance'. Navigation buttons and '1 - 1 of 1 items' are at the bottom.

Click the edit button:

Customer: Bart Didden - 2034

Customer Back to System Edit

Item: Monitoring
Description: Monitoring Services bb
P.O. Number:
Invoice In Arrears: No
Activation Date: 05/01/2017 Prorate: Yes
Next Invoice Date: 11/01/2017
Last Invoice Date: 10/01/2017
Cancellation Date:
Custom Date:

Use Cycle Amount: No
Billing Cycle: Monthly
Monthly Amount: \$29.95
Cycle Amount: \$29.95

Include Memo: No

Memo:

Click the 'Cancel RMR' button:

Customers Invoices Payments RMR Work Orders Proposals Calendar GL Reports Setup Accounting

Edit RMR: Bart Didden - 2034

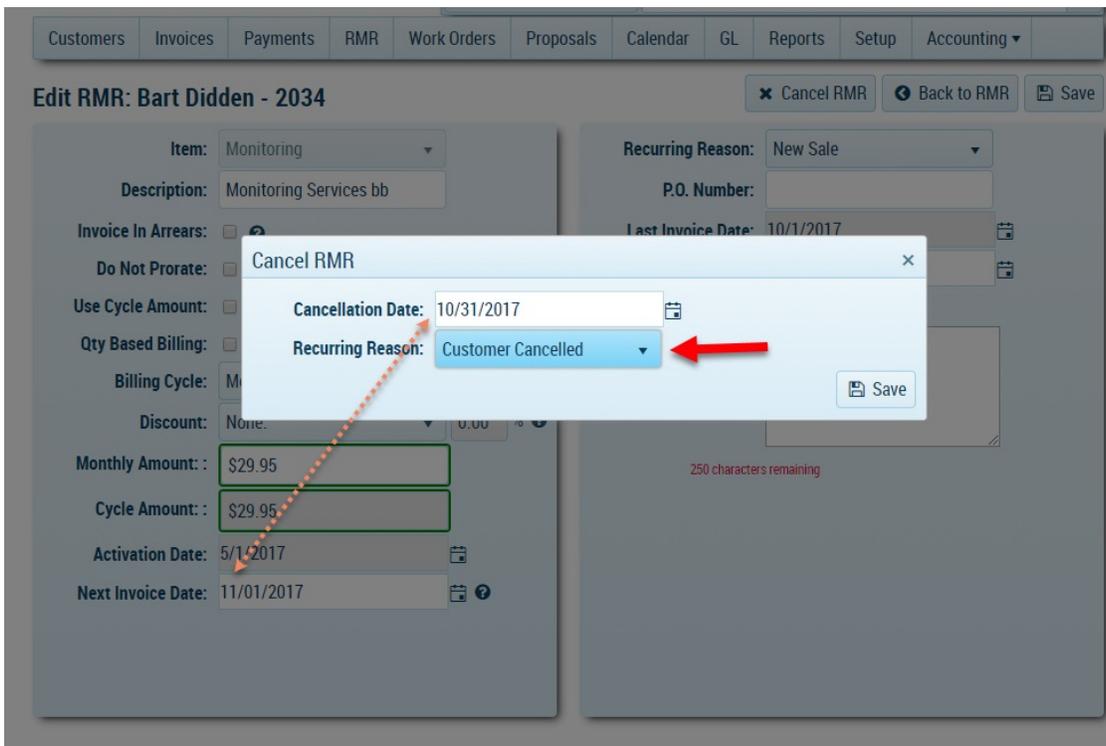
Cancel RMR Back to RMR Save

Item: Monitoring
Description: Monitoring Services bb
Invoice In Arrears:
Do Not Prorate:
Use Cycle Amount:
Qty Based Billing:
Billing Cycle: Monthly
Discount: None: 0.00 %
Monthly Amount: \$29.95
Cycle Amount: \$29.95
Activation Date: 5/1/2017
Next Invoice Date: 11/01/2017

Recurring Reason: New Sale
P.O. Number:
Last Invoice Date: 10/1/2017
Custom Date:
Include Memo:
Memo:

250 characters remaining

Type the Cancellation Date, which should be the date just before the 'next invoice date' so that your customer will not get another invoice from this RMR. Also, pick a recurring reason for this cancellation. You can create these in the setup under [recurring reasons](#).



Step 2, inactivate any Systems:

To inactivate a system, go to the customer's page; then go to the Sites/Sys tab; and then open the system. (When there is more than one site, click the black arrow to the left of the site to then see the systems that are under that site.)

Bart Didden - 2034 [Edit](#)

32432 Elm St New York, NY 32422 Phone: (432) 432-4324 Cell: (342) 342-3242 Email: bart@security.com Customer Type: Residential Salesperson: Brad Solomon	Status: Active Priority: Normal Customer Since: 06/05/2017 Last Statement: Term: Due on Receipt Delivery Method: Email Deliver RMR Inv: Yes	Open Invoices: \$0.00 Open Credits: \$0.00 Unapplied Cash: \$0.00 Balance Due: \$0.00 Total RMR: \$0.00 Auto Pay:
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1.) [Invoices](#) [Credits](#) [Sites/Sys 1](#) [RMR 0](#) [Work Orders 0](#) [Proposals 0](#) [Payments 1](#) [CC/eCheck 1](#) [Notes 0](#) [Contacts 0](#) [Utilities](#)

Sites/Systems [New Site](#) Show Inactive Sites

Site #	Site Name	Address	City	State
1	Bart Didden	32432 Elm St	New York	NY

System Number	System Type	Panel	Warranty Start Date
123456	Burglar Alarm	1142-Notify Central Station	05/01/2017

2.) [«](#) [«](#) [1](#) [»](#) [»](#) 1 - 1 of 1 items [↻](#)

Click the edit button:

System: Burglar Alarm - 123456 [Customer](#) [Back to Site](#) [Edit](#)

Customer: Bart Didden - 2034 System Number: 123456 System Type: Burglar Alarm Panel Type: 1142 Panel Location: <input type="text" value="Back Door"/>	Warranty Labor: One Year Warranty Warranty Part: One Year Warranty Warranty Start: 05/01/2017 Service Level: T&M Central Station: Acadian Account Number: 123456 Inactive Date:
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Comments:

[Notes](#) [RMR 0](#) [Work Orders 0](#) [System Parts 0](#) [Call List 0](#) [Zones 0](#) [Docs 0](#) [Custom Fields](#) [eForms 0](#)

Notes

Lastly, select the **Inactive** checkbox, and click save to inactivate the system:

Edit System: Bart Didden - 2034

Cancel Save

System Number: 123456	Warranty Labor: One Year Warranty
System Type: Burglar Alarm	Warranty Part: One Year Warranty
Panel Type: 1142	Warranty Start Date: 5/1/2017
Panel Location: Back Door	Service Level: T&M
Central Station: Acadian	1.) Inactive: <input checked="" type="checkbox"/>
Account Number: 123456	Inactive Date:

241 characters remaining

Comments:

Step 3, inactivate the Sites:

To inactivate the site, go to the customer's page; go to the Sites/Sys tab; and open the site:

Bart Didden - 2034

Edit

32432 Elm St New York, NY 32422 Phone: (432) 432-4324 Cell: (342) 342-3242 Email: bart@security.com Customer Type: Residential Salesperson: Brad Solomon	Status: Active Priority: Normal Customer Since: 06/05/2017 Last Statement: Term: Due on Receipt Delivery Method: Email Deliver RMR Inv: Yes	Open Invoices: \$0.00 Open Credits: \$0.00 Unapplied Cash: \$0.00 Balance Due: \$0.00 Total RMR: \$0.00 Auto Pay:
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1.)

Invoices 0 Credits 0 **Sites/Sys 1** RMR 0 Work Orders 0 Proposals 0 Payments 1 CC/eCheck 1 Notes 0 Contacts 0 Utilities

Sites/Systems

New Site

Show Inactive Sites

Site #	Site Name	Address	City	State
1	Bart Didden	32432 Elm St	New York	NY

System Number	System Type	Panel	Warranty Start Date
No items to display			

Click edit button:

Site: Bart Didden - 1 Customer Edit

Customer: Bart Didden - 2034 Site: Bart Didden 32432 Elm St New York, NY 32422 (432) 432-4324 bart@security.com	Site Number: 1 Sales Tax: OH - Geauga County Tax Rate: 7.000% Tax Exempt: Site Since: 06/05/2017 Inactive Date:
Warranty Start: 06/05/2017 Warranty Labor: Warranty Part: Service Level:	Comments:

Notes Systems RMR Work Orders Site Parts 0 Contacts Zones 0 Authorities Docs 0 Custom Fields eForms 0

Select the **Inactive** checkbox, and click save:

Edit Site: Bart Didden - 2034 Cancel Save

Site Info: Bart Didden 32432 Elm St Address 2 New York New York 32422 Plus 4 Phone: (432) 432-4324 ext. Email: bart@security.com	Site Info: SiteNumber: 1 Sales Tax: OH-GC - 7.000% Tax Exempt: Site Since: 6/5/2017 1.) Inactive: <input type="checkbox"/> Inactive Date:
Service Info: Warranty Start Date: 6/5/2017 Warranty Labor: Please Select. Warranty Part: Please Select. Service Level: Please Select.	Comments 250 characters remaining

Step 4, terminate the customer:

The last step in the process is 'Terminating' the customer. To do this, go to the customer's page and click edit in the upper right:

Bart Didden - 2034

[Edit](#)

32432 Elm St
New York, NY 32422
Phone: (432) 432-4324
Cell: (342) 342-3242
Email: bart@security.com
Customer Type: Residential
Salesperson: Brad Solomon

Status: Active
Priority: Normal
Customer Since: 06/05/2017
Last Statement:
Term: Due on Receipt
Delivery Method: Email
Deliver RMR Inv: Yes

Open Invoices: \$0.00
Open Credits: \$0.00
Unapplied Cash: \$0.00
Balance Due: \$0.00
Total RMR: \$0.00
Auto Pay:

Invoice #	Invoice Date	Due Date	PO #	Total Amount	Amount Due	Action
No items to display						

Change the status of the customer to terminated and click save button:

Edit Customer: Bart Didden

1.)

2.)

[Save](#)

Customer Number: 2034

Business Customer:

Billing Address:

Bart Didden

32432 Elm St

Address 2

New York New York 32422 Plus 4

Phone: (432) 432-4324 ext.

Cell Phone: (342) 342-3242

Email: bart@security.com

Customer Status: **Terminated**

Priority Level: Please Select

Customer Type: Active

Salesperson: **Terminated**

Term: Due on Receipt

Master Customer: Select Master Customer:

Delivery Method: Email

Prevent RMR Delivery: Prevents delivery of recurring invoices.

No Late Fees: Prevents late fees from accruing.

Late Fee: \$0.00

No Statements: Prevents statements from generating.

Show Open Invoices: Displays the open balance on invoices.

Customer Since: 6/5/2017