Configure Recurring Items

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This article details how to set up and configure Recurring items in AlarmBiller. Proper configuration of these items ensures your customer billing occurs as needed. This document is a basic overview and covers the items directly related to this feature. This document assumes you understand your basic accounting business practices related to your business and related terminology.

Prior to setting the configuration items, it is important to plan ahead. You should start by reviewing with your team and establishing the date you should run your recurring every month.

Setup Automation

Now that you know when you want to run your recurring, you can set up your Automation for your recurring invoices.

- Log into AlarmBiller then choose “Setup” on the top menu bar.
- Navigate to the “Utilities” section and choose “Automation.”
- Within the Automation settings, there are three sections:
    - Section 1 - Email Summary - Checking this box authorizes the system to send a daily company activity notification.
    - Section 2 - Payments
        - **Forte Payment Submit** - Checking this box confirms the automatic submission of your Forte transactions at 8 AM and 5 PM every day.
            - Choosing “Run Now” submits transactions at the time you hit the button.
        - **Expiring Credit Card Summary** - Checking this box confirms the email notification email of expiring credit cards on the first of every month.
    - Section 3 - Invoicing
        - **Invoice/Credit Deliver** - When selected, automatically sends/generates invoices for undelivered invoices and credits.
        - **RMR Invoice Delivery** - When selected, automatically sends/generates invoices for undelivered RMR invoices.
- Within the RMR Automation settings, there are also three sections:
    - Section 1 - RMR Generation
        - “**Run on the _ of the month”** - Set the day of the month to run invoices.

“RMR Next Invoice from_” - Determine when the invoice should run. Current, Previous, Next Month, or Two Months ahead.

- **“Invoice Date is the _ of the _”** - Determine what date should be on the invoice and for what month are you running this invoice. For example, if today is 1/1/2020, ask if the invoice will be January (current month), February (next month), or December (previous month).
- Below these settings, in red lettering, the dates configured to show:
    - Next RMR Run Date
    - RMR Next Invoice Date
    - Invoice Date
    - Next CC/eCheck Funding date

- Section 2 - Master RMR Generation - This section contains the same information as described above for Master Customer records.
- Section 3 - Statement Generation - Here you choose the date of the month to run statements.

  To enable any of these sections, tick the checkbox in the upper left-hand corner of the section. Once you complete the work on these sections, click Save.

  - **"Run on the _ day of the month"** - The day of the month to run statements. Note there is a link about Statement Rules in this section. It is always a good idea to review them before setting this day.

Preview Invoices

It is useful to preview invoices to ensure they contain what you expect. The following steps through how to preview invoices:

- Navigate to Invices across the top menu bar. When loaded, ths page displays all invoices.
- Choose "Generate Recurring Invoices" at the top to generate recurring invoices at the Dealer level. It is also possible to do this at the customer level.
- Within the Generate Recurring Invoices dialog:
  - **"RMR Process Date"** - Select the month for which you are generating the invoice. This is the month for which you are charging services.
  - **"CC/eCheck Funding Month"** - Determine the month for funding. This determiens the month your auto-pay customers are paying for in this invoice.
  - **"Generate Master Recurring"** - If you have recurring items being billed directly to a Master customer, you will need to Generate invoices twice. First without this box checked, and second with this box checked.

- Choose "Generate Preview" - This laods the "Recurring Invoices Preview" page, and displays a listing of all the customers with recurring items within the RMR process data selected.
  - Click the arrow to the left of the customer name to view the details about the charges for that individual recurring item.
  - Please note: You are NOT processing your invoices when you select "Generate Preview."
  - You may export your previewed invoices by clicking "Export to Excel."

Processing Invoices

After reviewing the invoices, and you are happy, you can then process the invoices.

- To process all:
  - Click the Select All checkbox to select all the invoices.
  - Click Process Invoices, found on the upper right-hand corner of the preview screen.
- To process some:
  - Click the checkbox to the left of the customer name.
  - Click Process Invoices.
- In either scenario, when you click "Process Invoices," a Memo box appears.
  - Type any additional Memo information to display on the invoice.
  - If the customer already poseses a memo, this memo also appears on the invoice.
- Choose "Complete Invoices" in the bottom right corner of the page. This returns you to the Invoices page. The invoices processed are then listed as an Open Invoice on the "Invoice" tab. It also appears in the "Invoices/Credits

Not Delivered” tab.