Cancelling a Recurring Line

Recurring Lines may be canceled by using one of two methods. If using the Cancellation Queue, all recurring lines are automatically cancelled when completing the cancellation. Recurring lines may be manually canceled from the Customer Explorer record. For information on recurring line cancellations using the Cancellation Queue, refer to the following link for detailed information. RMR Cancellations from the Cancellation Queue.

This topic section will cover manually canceling a recurring line from the Customer Explorer.

1. Open the Customer Explorer record for which a recurring line will be canceled.

2. From the Customer Tree highlight the Recurring option; in the Active Pane highlight the Recurring Line to be canceled, right-click and select the Cancel RMR option.

3. The Recurring Cancellation form will be displayed.

- Select the RMR Reason code for the cancellation from the drop-down list.
- Enter the Cycle Ending Date; this is the date the recurring line will stop invoicing. The Reduce RMR field will automatically fill in with the negative monthly amount of the recurring line.
- You may enter detailed information into the Comments field for reference purposes. Any information entered into the Comments field is displayed when drilling into the details of the RMR History record for the canceled recurring line.

Click the Save button at the bottom of the form when finished.

If the Cycle Ending Date is in the future, the recurring line will be displayed in the list of Recurring Lines within the Customer Explorer until one day after the ending date. If the Cycle Ending Date entered is a date in the past, once the cancellation has been saved, the recurring line will disappear from the list of Recurring Lines.

Note: The SedonaOffice application does not generate a credit (except for RMR for Subaccounts) if the cancellation date is in the date range of a period that was already invoiced to the customer. If you want to credit your customer for a period already billed, a manual credit memo would need to be generated.

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