

Decreasing a Recurring Line

Last Modified on 01/09/2023 2:08 pm EST

Recurring Lines may be manually decreased from the Customer Explorer; this is considered a partial cancellation. Follow the steps below for complete instructions.

1. Open the Customer Explorer record for which a recurring line will be decreased.
2. From the Customer Tree highlight the Recurring option; in the Active Pane highlight the Recurring Line to be decreased, right-click and select the Cancel RMR option.
3. The Recurring Cancellation form will be displayed.
 - Select the RMR Reason code for the rate decrease from the drop-down list.
 - Enter the Cycle Ending Date; this is the date the old recurring line will stop invoicing (a new recurring line will automatically be created with the new rate).
 - In the Reduce RMR field, type in the negative monthly amount by which the recurring line will be decreased. For example, if the current monthly rate is 25.00 and the new monthly amount will be decreased to 20.00, then enter -5.00 in the Reduce RMR field.
 - You may enter detailed information into the Comments field for reference purposes. Any information entered into the Comments field is displayed when viewing the details of the RMR History record for the rate decreased recurring line.

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

□