Edit a Recurring Line

Once a Recurring Line has been created some of the data fields may be edited and saved. Below is a list of the fields that may be edited or modified. The recurring line fields that may not be edited or changed are:

- RMR Amount
- Cycle Amount
- Recurring Start Date

If a data entry error was made when entering the Recurring Start Date and/or Cycle Start Date or RMR amount and an invoice has not yet been created and posted for the recurring line, the User may delete the recurring line and re-enter it, if the User has the proper security permissions.
If the recurring line has already been invoiced where the Recurring Start Date was entered incorrectly, the User will have to cancel the recurring line then create a new recurring line with the correct information. This may involve crediting off the invoice that was created with the incorrect recurring line setup information.
If an error was made when entering the initial Next Cycle Date, the User may click on the button to the right of the Next Cycle Date field and change the Next Cycle Date. If the recurring line was already invoiced, you may still modify the Next Cycle Date, but would probably have to credit off any invoices created with the incorrect dates.
User permissions are required to be able to edit and/or delete a recurring line and to change the Next Cycle Date.
Recurring Line Fields that may be Edited:

-

To Edit an existing Recurring Line, follow the instructions below.

1. Open the Customer Explorer record for which a recurring line will be edited.
2. From the Customer Tree highlight the Recurring option; in the Active Pane double-click on the Recurring Line to be edited.
3. The Recurring Edit form will be displayed. Make the necessary changes, then click the Save button located at the lower right of the form.

-