

Setup RMR Rates for a Master Account

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Once a Master Account has been created, you may setup a list of default rates to be used when creating new Recurring Lines for one of the Subaccounts. Follow the instructions below.

1. Open the Master Account for which default RMR rates will be setup.

2. From the customer tree, highlight the tree option Customer Information; right-click and select the Edit Customer Setup option.

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3. The Customer Setup form will be displayed. Click on the Master Account Setup tab.

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4. Three additional tabs will be displayed; Sub Accounts, Setup Services and Rates, and CS Integration Defaults. Click on the Services and Rates tab.

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5. The Setup Services and Rates form is divided into two tiers; Services and Rates and RMR Item Summary. Setup is performed in the Services and Rates area. The grid below Services and Rates is used to compile a list of all possible Invoice Items that are typically used when setting up Recurring Lines for a Subaccount for the Master Account.

In the grid area of the Services and Rates section, click on the first blank line and click the drop-down arrow to select the Invoice Item. Tab to the Rate field and enter the default rate that will be used for this Master Account. Continue on to the next line until all the desired Invoice Items have been selected. Click the Save button when finished.

When a new Recurring Line is created for a Subaccount, the rates entered into this list will default into the monthly rate field within the Recurring Setup form. The default rate may be overridden by the User when setting up recurring lines.

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