



SedonaOffice
RMR for Installation
Payment Plans

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Managing RMR for Installment Payments

When creating recurring lines for installment payments that you do not want to include as a part of the regular RMR reporting, you would use an RMR Reason Code that is set up as a non-reporting type. When setting up the future cancellation of that same recurring line, you would also use the same RMR code for the ending of that recurring line.

If it is desired to correct historical recurring that was for installment payments, you may open the Recurring History records and change the RMR Reason Code for the creation of the recurring and the cancellation of the recurring.

Setup

RMR Reason Code Setup

When creating the RMR Reason Code for installment payments, select the Reason Type of NR (non-reporting). By using this reason type, you are able to filter out recurring additions and cancellations from several of the RMR reports available on the SedonaOffice Report Manager.

RMR Reason

Code	Description	Reason Type	Inact...
Accounting Correction	Accounting Correction	AC	N
Acquisition	Acquisition	AQ	N
Add Service	Add Service	AE	N
Auto add	Added by Auto integration	OR	N
Auto cancel	Cancelled by Auto integration	OR	N
Bankrupt	Bankrupt	FC	N
Branch Change (SS)	Branch Change	SS	N
Comm Charge-Back	Commission Charge-Back	OR	N
Competition	Lost to Competition	FC	N
Conversion	Conversion	OR	N
Deceased	Deceased	FC	N
Delete(SS)	Delete	NR	N
End of Contract	End of Contract	FC	N
General Cancellation	General Cancellation	FC	N
Installation Installments	Installation Installments	NR	N
Item Change (SS)	Item Change	SS	N
Moved	Moved	FC	N
New Job RMR	New Job RMR	NJ	N
New RMR	New RMR	NJ	N
Non-Payment	Non-Payment	NR	N

Include Inactive

RMR Reason Edit Inactive

Code: Installation Installments

Description: Installation Installments

Reason Type: NR

Apply New Delete

Creating new RMR for Installment Payments

When setting up the recurring line for the Installment Payments, make certain to select Installment Plan (or whatever your reason code is) in the field “Reason for Add” (RMR Reason Code).

The screenshot shows a software window titled "New Recurring Item10007". The "Site and System" section displays the address: Earl Owens, 1394 Tolland Stage Rd, Chagrin Falls, OH 44022. The system is identified as 881-4441 Access. The "Recurring Setup" tab is active, showing the following fields: "Recurring Item" is set to "Installment Plan"; "Description" is "Installment Plan for Installation"; "Sub Item Of" is empty; "Bill Cycle" is "Monthly"; "Bill On Day" is "1"; "RMR Amount" is "59.00"; "Cycle Amount" is "59.00"; "Next Cycle Date" is "01-Aug-19"; "Reason for Add" is "Installation Installments"; "Recurring Start" is "8/1/2019"; and "Invoice Group #" is empty. The "Enter as Monthly Amt Only" checkbox is checked. The "Third Party Bill To" checkbox is unchecked. The "Comments" and "Memo" fields are empty. The "Save" and "Close" buttons are at the bottom right.

Ending RMR for Installment Payments

After the recurring is setup for the installment payments, you will immediately setup the cancellation to end the recurring. Make certain to select your Installment Plan (or whatever your reason code is) in the field "RMR Reason".

The screenshot shows a software window titled "Recurring Cancellation 320". It is divided into three main sections: "Site and System", "Recurring Information", and "RMR Tracking".

- Site and System:**
 - Site: Tammy Fairchild, 1234 Old Mill Road, Detroit, MI 48219
 - System: 320 Access
 - Panel Type: 2200
- Recurring Information:**
 - Item: Installment Plan
 - Sub Item Of: (empty)
 - Bill Cycle: Monthly
 - RMR Amount: \$79.50
 - Cycle Amount: \$79.50
 - Next Cycle Date: 6/1/2019
- RMR Tracking:**
 - RMR Reason: Installation Installments (highlighted with a red box)
 - Cycle Ending Date: 9/30/2019
 - Reduce RMR: -79.50
 - Comments: End of Installment Payment Plan

At the bottom right, there are "Save" and "Close" buttons.

Correcting Historical Records

If you want to go back and change active (or completed) recurring for payment plans, you can manually edit the RMR History records on each customer.

Open the customer with recurring for installment payments RMR. Click on the Recurring History menu option on the customer tree. In the active pane (right side of the screen), locate the RMR History record of the creation and cancellation of the Installment recurring.

The screenshot shows a software window titled "320 Tammy Fairchild". On the left is a tree view with "Recurring History" selected. The main area is split into two panes. The top pane shows customer details: Tammy Fairchild, 1234 Old Mill Road, Detroit, MI 48219, (313) 457-8965. The bottom pane shows a table of RMR History records.

Eff. Date	Reason	Item Code	Decrease/Re...	Increase/Add	System	User
5/28/2015	Add Service	Smoke Detection		\$45.00	CCTV	Administrator
5/28/2015	Site/System Change (SS)	Subscriber MON		\$75.00	CCTV	Administrator
5/31/2015	General Cancellation	Smoke Detection	\$45.00		CCTV	Administrator
6/3/2015	New RMR	MON		\$40.00	Access	Administrator
11/1/2016	Deceased	Subscriber MON	\$3.75		CCTV	Melissa
11/3/2016	Deceased	MON	\$2.00		Access	Melissa
12/1/2017	Rate Increase	Subscriber MON		\$1.43	CCTV	Administrator
12/3/2017	Rate Increase	MON		\$0.75	Access	Administrator
4/1/2019	Installation Installments	Installment Plan		\$79.50	Access	Administrator
9/30/2019	Installation Installments	Installment Plan	\$79.50		Access	Administrator

You will open each RMR History record and change the RMR Reason (code) to your Installment Plan (or whatever your reason code is) in the field “RMR Reason”.

The screenshot shows a software window titled "RMR History" with a close button (X) in the top right corner. The window contains the following fields and values:

Customer Number	320	Branch Code	MI
Site Address	1234 Old Mill Road	Item Code	Installation Plan
System Code	Access		
System Account	320		
Effective Date	4/1/2019	Job Code	000
RMR Amount	\$79.50	User Code	Administrator
RMR Reason	Installation Installments		
Comments	<input type="text"/>		

At the bottom right of the window, there are two buttons: "Save" and "Close". The "RMR Reason" dropdown menu is highlighted with a blue border.

RMR Reporting

There are many reports available on the Report Manager that have an option to exclude non-reporting RMR Reason Codes.

RMR Increase Detail

Branch

- All
- A1 Security
- Canada
- CSS
- CW Alarms
- Dealer 001
- Michigan
- Ohio

Hide Inactive Branches
 Show Each Branch

Options

Include Reporting Items
 Include Non-Reporting Items

Effective Date

Accounting Period Dates

From: 7 7/1/2019 - 7/31/2019

To: 7 7/1/2019 - 7/31/2019

Effective Date Created Date

Customer Number

All
 Customer Range [] to []

Sorting

Effective Date

OK Cancel

The reports with the ability to exclude non-reporting RMR Reason Codes are:

RMR Cancellation %

RMR Cancellation Amounts

RMR Cancellations Detail

RMR Cancellations Summary

RMR Increase %

RMR Increase Amounts

RMR Increase Summary

RMR Increase Detail

There are two more reports that allow you to select to exclude certain RMR Reason Codes.

These reports are:

RMR Changes Detail Report*

RMR Reason Code Summary*

RMR Changes Detail

Sales Date

Accounting Period Dates

7 7/1/2019 - 7/31/2019

7 7/1/2019 - 7/31/2019

Effective Date Created Date

Branches

A1

CAN

CSS

CW Alarms

Dealer 001

MI

Hide Inactive Branches

Select All Invert Selection

Show Each Branch

Reason

Delete(SS)

End of Contract

General Cancellation

Installation Installments

Item Change (SS)

Moved

Hide Inactive Reasons

Select All Invert Selection

Sort By

Customer Number

Ok Cancel