

Terminating a Customer in AlarmBiller

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Steps on terminating (inactivating) a customer in AlarmBiller:

- 1) Cancel or Delete the RMR(s). If you have the option to delete, use that, otherwise use Cancel.
- 2) You will need to make sure there are no open invoices, work orders, proposals, credits, unapplied payments, or appointments associated with the customer. If there are, you need to complete those first.
- 3) Inactivate any Systems, by going to the System page for that customer, click edit, select the box for Inactive and save.
- 4) Inactivate any Site(s) by going to the Site page, click edit and select the box to Inactivate. We also recommend removing the credit cards or eChecks from the account so they will not show on the expired report in the future. Then from the main customer page, click on Edit, and change the Status of the customer from Active to Terminated.



Note: if you are searching for an inactive customer, click on Customers tab up top, then you will have to select the option for 'Terminated Customers' under the button labeled 'Customer Grid Layouts'.