

Adding RMR Items to Subaccounts in SedonaOffice

12/28/2023 2:48 pm EST

When adding a New Recurring Item for a Subaccount there is a selectable box - "Show All Items". Depending on whether that box is selected or not will provide different options when selecting the new Recurring Item.

Not Selecting "Show All Items"

If this box is not selected the only options that will be available in the Recurring Item drop-down menu will be Recurring Items that have previously been selected for the Subaccounts under that Master Account or items that have been entered in the Master Account Setup.

New Recurring Item41147

Site and System

Stadler Ace Hardware
3 Stadler Street
Detroit, MI 48201

Stadler Ace Hardware
3 Stadler Street
Detroit, MI 48201

System: L6149
Intrusion

Panel Type: UNKNOWN

Receivable to Master

Recurring Setup | Royalties/Commissions | Changes | Escalations

Recurring Item: [Dropdown] Show All Items

Item	Description	RMR Rate	Type
Fire Monitoring	503	5.00	
Intrusion Monitoring	502	5.00	
MON-Taxable	Monitoring	6.00	

Sub Item Of: [Dropdown]

Bill Cycle: MON-Taxable

RMR Amount: \$0.00

Cycle Amount: [Text Box]

Next Cycle Date: [Dropdown]

Reason for Add: [Dropdown]

Recurring Start: 2/15/2023

Invoice Group: None

Enter as Monthly Amt Only

Use Today as Default

PO Number: [Text Box]

PO Expires: [Text Box]

Reference: [Text Box]

Comments: [Text Area]

Memo: [Text Area]

Save Close

Once you add that new RMR Item it will be added to this list.

Selecting "Show All Items"

Selecting this box will populate all Recurring Items within Sedona Office Setup.

Site and System

Stadler Ace Hardware
3 Stadler Street
Detroit, MI 48201

System L6149
Intrusion

Panel Type UNKNOWN

Recurring Setup | Royalties/Commissions | Changes | Escalations

Recurring Item Show All Items

Item	Description	RMR Rate	Type
2 YR. Recurring	2 YR. Recurring	0.00	2 YR Recurring
5 year RMR	5 year RMR	0.00	Recurring-Moni
555	555	1.00	Central
Alarm.Com	Alarm.Com Monitoring	3.00	Central
Alarmnet	Alarmnet	2.50	Recurring-Moni
Alarmnet Overages	Alarmnet Overages	0.00	Recurring-Othe
Burg Monitoring	Burg Monitoring	0.00	Recurring-Moni
Carbon Monoxide II	Carbon Monoxide Monitoring II	0.00	Recurring-Moni

RMR Amount

Cycle Amount

Enter as Monthly Amt Only

Next Cycle Date

Reason for Add

Recurring Start 2/15/2023 Use Today as Default

Invoice Group None

Comments

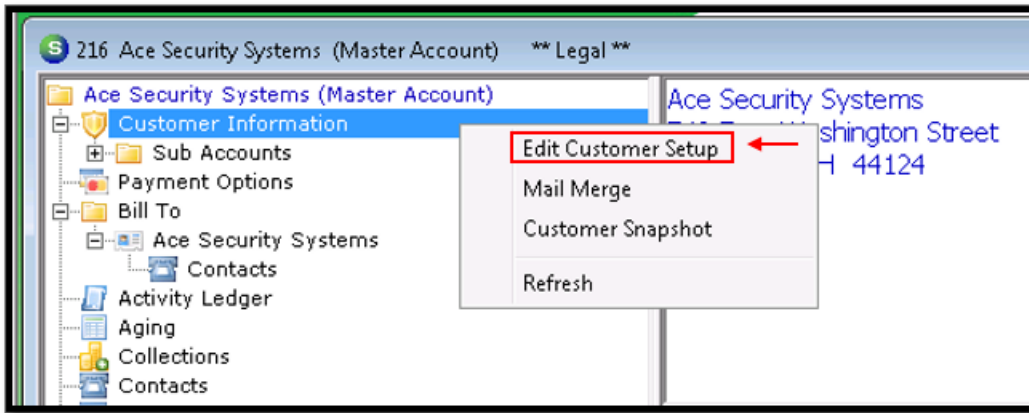
Memo

Save Close

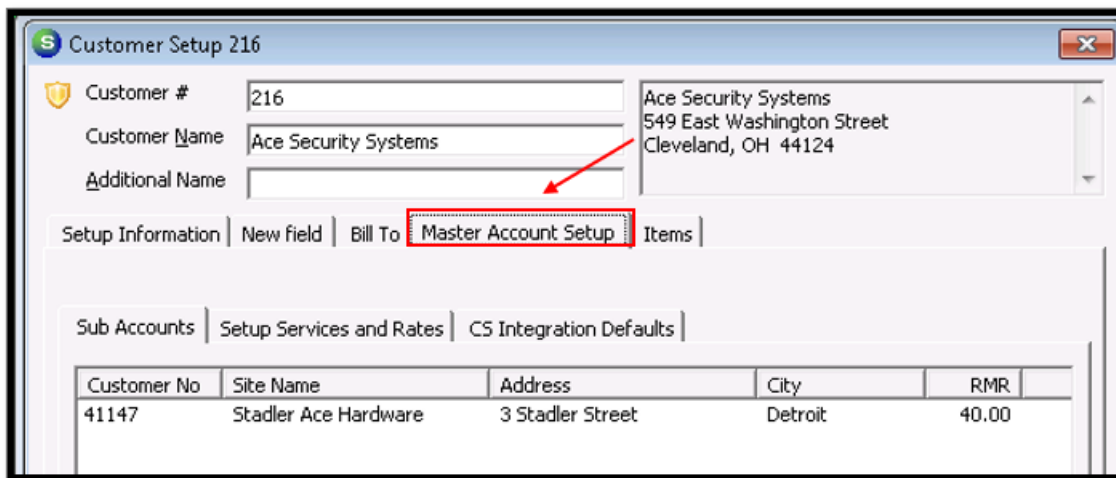
Master Account Setup

You can also view and add to the current list of RMR Items under the Master Account.

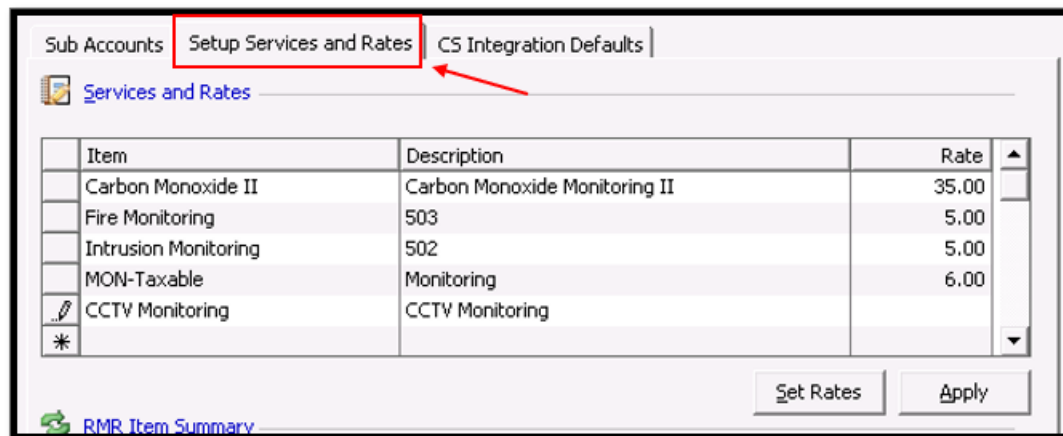
In the Master Account right-click on Customer Information.
Select "Edit Customer Setup".



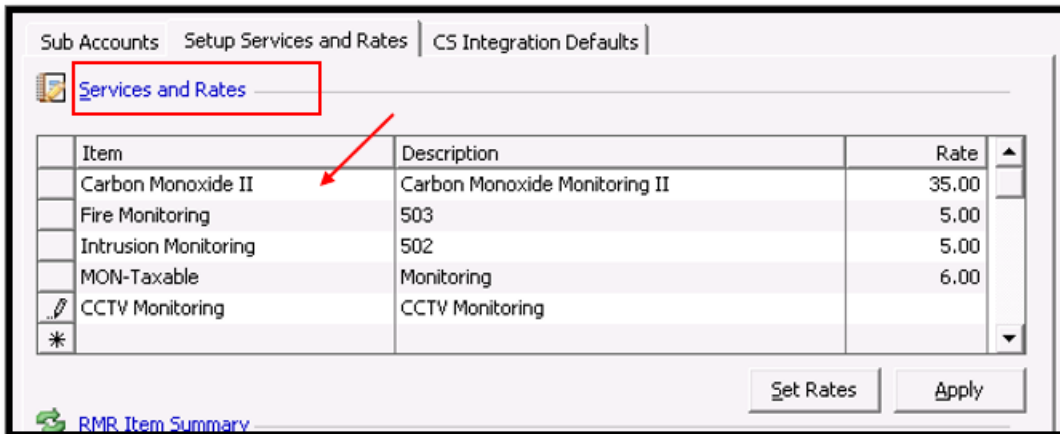
Select the "Master Account Setup" Tab.



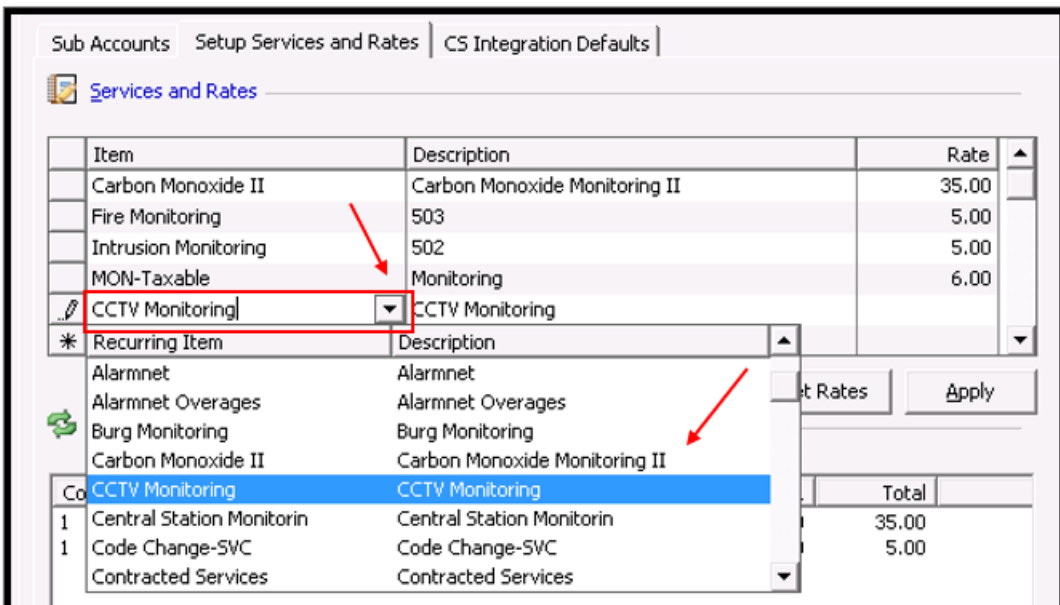
Select the "Setup Services and Rates" Tab.



The "Services and Rates" Section will list the current Recurring Items that are available for selection when adding new Recurring Items to a subaccount and the "Show All Items" box is not selected.



Recurring Items can also be added directly to this section which will allow that item to be selected when adding the new Recurring Items and not selecting the "Show All Items" box.



The "RMR Summary Item" on the bottom portion of that screen will list all RMR Items that are active under the subaccounts and provides the Total Current RMR for all RMR Items.