

BoldGroup Support Hold Disables AlarmBiller Automation Settings

06/04/2024 10:08 am EDT

Dealer created a case informing us that she had to manually generate her RMR invoices because AlarmBiller did not automatically do this for her. This was due to their Automation settings being disabled. It is recommended that follow these steps

1) Click on the Setup tab up top and then click on Automation (under Utilities)

2) Complete this table as desired and then click the save button

Your Logo Goes Here...
Select Dealer Setup -
Preferences to update your
logo...

Erick

Support

Customers

Customer Search: name - cust #

Customers

Invoices

Payments

RMR

Work Orders

Proposals

Calendar

GL

Reports

Setup

Accounting

Automation Settings

Save

☐ Email Summary

Send an email summarizing company's daily activity At 12:30 AM (suppresses other automation emails).

☒ Forte Payment Submit

Automatically submit Forte transactions At 08:00 AM and 05:00 PM, every day.

Run Now

Forte Funding

Run Now

☒ Expiring Credit Card Summary

Email summary of credit cards expiring this month or sooner At 04:30 AM, on day 1 of the month.

Run Now

☐ Invoice/Credit Delivery

Automatically (mail, email, and generate a print batch) for undelivered invoices and credits At 05:00 AM, every day. Mailing services start printing at 12 noon ET.

☒ RMR Delivery

Automatically (mail, email, and generate a print batch) for undelivered RMR invoices At 05:00 AM, every day. Mailing services start printing at 12 noon ET.

☒ RMR Generation

Generates Recurring Invoices every month At 03:00 AM.

Run on the 1st day of the month

RMR Next Invoice for Current Month

Invoice Date is the 1st day of Current Month

Next RMR Run Date: 04/01/2024

RMR Next Invoice Date: 04/01/2024

Invoice Date: 04/01/2024

Next CC/eCheck Funding Date: 04/xx/2024

☐ Master RMR Generation

Generates Recurring Invoices every month at At 03:30 AM.

Run on the 1st day of the month

RMR Next Invoice for Current Month

Invoice Date is the 1st day of Current Month

Next RMR Run Date: 04/01/2024

RMR Next Invoice Date: 04/01/2024

Invoice Date: 04/01/2024

Next CC/eCheck Funding Date: 04/xx/2024

☐ Statement Generation

Generates Statements every month At 04:00 AM.

Run on the 1st day of the month

Next Statement Run Date: 04/01/2024

Statement processing will use statement defaults as specified in Statement Rules.