

How to Manually Generate RMR Invoices (Managely)

01/10/2025 5:00 pm EST

Follow these steps to manually generate an RMR invoice from the customers page in Managely

1. Log into Managely, go to the customers page and click the RMR tab.

The screenshot shows the Managely interface for a customer named Chewy Steckel. The left sidebar contains navigation links for Home, Accounts Receivable, Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, Collections, Accounts Payable, Inventory, eForms, GL, Reports, and Setup. The main content area displays the customer's profile, including contact information, a salesperson, and a 'Customer Aging' bar chart. Below the profile, there is a tabbed interface with options like Invoices, Credits, Sites/Systems, Contracts, RMR, Work Orders, Bill to Information, Proposals, Payments, CC/Check, Notes, Contacts, Documents, and Collections. The 'RMR' tab is selected, showing a 'Generate Recurring Invoice' button and a table of RMR items. The table has columns for RMR #, Item Code, Description, Billing Cycle, RMR Cycle Start Date, Cancellation Date, Monthly Amount, and Cycle Amount. One item is listed: RMR # 15121, Item Code Trip Fee, Description charge for trip fee, Billing Cycle Monthly, RMR Cycle Start Date Jan 1, 2024, Cancellation Date, Monthly Amount \$25.00, and Cycle Amount \$25.00.

2. Click the **Generate Recurring Invoice** button
3. Fill out the RMR Process date (in this example we chose 01/01/2024 as that is the next RMR set to run); select an invoice date (this will appear on the invoice itself again we will choose 01/01/2024); and click the **Generate Preview** button

The screenshot shows the 'Recurring Invoice Generation' page in Managely. The left sidebar is the same as the previous screenshot. The main content area has a message: 'There are currently no recurring invoice preview generation jobs running. To run a new generation cycle, set the generation parameters and click "Generate Preview". Once preview generation is complete, select the desired customers in the grid below and click "Process Invoices" to create live invoices from the preview list.' Below this message is a form with fields for RMR Process Date (1/1/2024), Next RMR Process (12/1/2023), Invoice Date (1/1/2024), CC/Check Funding Month (Current Month), RMR Groups, and a checkbox for Generate Master Recurring (NO). To the right of the form is a 'Generate Preview' button. Below the form is a 'Preview Items' section with a table showing the results of the preview generation. The table has columns for Customer, Amount, Tax Amount, and Total Amount Due. One customer is listed: Steckel, Chewy - 3704, with an Amount of \$25.00, Tax Amount of \$0.00, and Total Amount Due of \$25.00. Above the table are buttons for 'Export to Excel' and 'Process Invoices'.

4. A preview of the RMR invoice is displayed; click the **Process Invoices** button

5. You are returned to the customers page and the RMR invoice is displayed under the invoices tab

MANAGELY All All Search: #

Home Accounts Receivable Customers Invoices Payments RMR Work Orders Proposals Calendar Collections Accounts Payable Inventory eForms GL Reports

Chewy Steckel
Customer #5704 Active Normal Residential • Since 6/30/23

Total Balance Due: \$245.73 Total RMR: \$25.00

Customer Aging

Address: 1234 Main St., Cuyahoga Falls, OH 44221
Phone: (440) 247-1640
Cell: -
Email: chewy@gmail.com
Branch: -
Auto Pay: Credit Card (8532)
Collections Status: -

Salesperson: Justin DeBaggis
PO Number: -
Last Statement: November 8, 2023
Default Term: Due on Receipt
Part Pricing Level: -
Delivery Method: Print
Delivery RMR Inv: ☒

Comments: Chewy my Dewey!

Invoices: 6 Credits: 0 Sites/Systems: 2/1 Contracts: 1 RMR: 1 Work Orders: 13 Bill To Information: 1 Proposals: 2 Payments: 25 CC/Check: 8 Notes: 0 Contacts: 0 Documents: 0 Collections: 0

+ New Invoice Generate Statement

Invoice: 21931 Invoice Date: Jan 1, 2024 Due Date: Jan 1, 2024 PO Number: Total Amount: \$25.00 Amount Due: \$25.00