

How To Use “Sub Item of” to Roll-up Recurring Items

09/13/2024 4:12 pm EDT

If you want to “Roll-up” Recurring Items into One Item instead of each one being listed separately on a Cycle Invoice, you can use the Sub Item of Feature.

Customer Recurring

To “Roll-up” RMR Items for existing Recurring, right-click on the RMR Item and select “Edit.”

On the “Recurring Setup” Tab click the drop-down menu for “Sub Item of” and select the RMR Item that will you want to display on the Cycle Invoice. Save.

The screenshot shows a software window titled "Recurring Edit 2099-1". It has a sidebar with icons and a main content area. The main area has tabs: "Recurring Setup", "Royalties / Commissions", and "Escalations". The "Recurring Setup" tab is active, showing a "Recurring Information" section. This section contains several fields: "Recurring Item" (CCTV Monitoring), "Description" (CCTV Monitoring), "Sub Item Of" (Alarmnet, highlighted with a red box), "Bill Cycle" (Monthly), "Renewal", "Rate Increase", "Override %" (0), "PO Number", "PO Expires", "Reference", "Memo", "RMR Amount" (\$25.00), "Cycle Amount" (\$25.00), "Next Cycle" (July 2024), "Recurring Start" (7/1/2024), "Recurring End", and "Invoice Group" (None). At the bottom right are "Save" and "Close" buttons.

Complete the above step for each RMR Item that will be included in the “Rolled-up” RMR Item.

Recurring Display

Once the RMR Items are added to the “Sub Item Of” they will be listed under that Item when looking at the Customer Recurring.

Item Code	Description	System	Cycle	Group	RMR	Cycle Amt	Next Cycle	Cycle Start	Cycle
Alarmnet				0 -	\$100.00				
Burg Monitoring	Burg Monitoring	CCTV	M	0 - None	\$40.00	\$40.00	7/1/2024	7/1/2024	
Carbon Monoxide II	Carbon Monoxide Monitoring II	CCTV	M	0 - None	\$35.00	\$35.00	7/1/2024	7/1/2024	
CCTV Monitoring	CCTV Monitoring	CCTV	M	0 - None	\$25.00	\$25.00	7/1/2024	7/1/2024	
		Total			\$100.00				

Cycle Invoice Edit Mode

When viewing the Cycle Invoice in Edit Mode, each RMR Item will be displayed separately and not as a Sub Item of RMR Item.

Invoice

Customer ID: 2099-1 Category: Admin G & A A/R Account: 110110 Tag Group: OH-Cuyahoga County

Invoice #: 497949 Invoice Date: 7/1/2024 - 7/31/2024 Aging Date: 7/1/2024

Blaine Day
88 Birch St
Cleveland, OH 44110

Site Address: Blaine Day
88 Birch St
Cleveland, OH 44110

Branch: OH Warehouse: [] Invoice Type: [] Cycle Bill: [] Salesperson: N/A Billing Date: 7/1/2024

Items \$100.00

Item	Site	Exempt	Months	Rate	Amount	Memo
CCTV Monitoring	CCTV Monitoring	☐	1	25.00	25.00	
Carbon Monoxide II	Carbon Monoxide Monitoring II	☐	1	35.00	35.00	
Burg Monitoring	Burg Monitoring	☐	1	40.00	40.00	
*		☐				

Print Preview/Printed Cycle Invoice

When Print Previewing/Printing the Cycle Invoice, the RMR Items will be Rolled Up as the One RMR Item that was selected for the Sub Item of RMR Item.

Sedona Security
123 Safety Street
Nowhere, NY 55555

Invoice

Customer: Blaine Day
Customer Number: 2099-1
Invoice Number: 497949
Invoice Date: 7/1/2024
PO Number: []
PAYMENTS APPLIED THRU: 7/31/2024
Job / Service Ticket #: []

CURRENT CHARGES

Quantity	Description	Rate	Amount
1.00	Alarmnet CCTV, 7/1/2024 - 7/31/2024	100.00	100.00
	Subtotal:		\$100.00
	PST		4.65
	GST (596)		0.00
	Payments/Credits Applied		0.00
	Invoice Balance Due:		\$104.65