

How to Troubleshoot RMR Items in a Job when None are Showing in the Drop-down List

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There are times when Change Orders happen during a job. These change orders can change RMR items as well. What happens when the RMR item that is needed is not showing up in the drop-down to select. Follow the steps below to find and fix this issue.

Overview

This document goes over how to trouble shoot RMR that is not showing up in the drop-down list in a Job. This document also assumes the user doing the steps has the proper permissions to complete them.

Steps:

In our example we are trying to add RMR 086 Item to the Job as a Change Order.

1. Open Job that will need Change Order to add RMR

The screenshot shows the 'New Change Order' form in a software application. The form is titled 'Job - 807 (Diamond Pizza - 650-Main)'. It has a sidebar on the left with icons for Log, Notes, Invoicing, Issue Parts, Add Change Order, Journal Entry, and Purchase Orders. The main form area is divided into sections: 'Job Information' and 'Permits Required'. The 'Job Information' section contains fields for Job Number (807 - 9), Job Type (Fire-Small-Com), Description (Fire - Small Com Sprinkler), Tag Group (OH-Cuyahoga County), Branch (OH), Holdback % (empty), Install Company (OH), and Installer (empty). The 'Permits Required' section has three checkboxes for Permit 1, Permit 2, and Permit 3, all of which are unchecked. A red box highlights the 'Notes' field, which contains the text 'Adding new RMR to Job'. An 'Apply' button is located at the bottom right of the form.

2. When the Change Order Recurring is clicked – then Click New – Click on Recurring Item drop-down – the 086 RMR Item is not showing as available in the list

CO 807 - 9 -Recurrings

Item Code	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amount	Cycle Amt	Tax	Exempt	Master	Active
Total Monthly Amount 0.00 0.00										

Recurring Item: [Dropdown]

Description: [Dropdown]

Sub Item Of: [Dropdown]

Bill Cycle: [Dropdown]

Cycle Start: [Dropdown]

Enter as Monthly Amt Only ☒

Delete

Apply

3. The job is using the Job Type: Fire-Small-Com

Job

Job Number 807

Job Type Fire-Small-Com

Job Status Job Complete

System 650-1-1 Fire Sprinkler

Labor Units 10.0 (3.25 Used)

4. In SedonaSetup - Job Types JM - Select the Job Type - Click on Items Tab

Sedona Office Setup (Demo VS Manitou)

File Find Find Next View Tools Help

Sedona Setup

Area

Job Types

Job Type [Fire-Small-Com] Description [Fire - Small Commercial]

Detail Job Tasks Costing Items Accounts Commission Types Phases

Item Code	Description	Default Amount
Inst-Com-Fire	Install Fire System-Commercial	0.00
Job Labor LCOM	Job Labor-Commercial	0.00
Job Part FISC	Job Part	0.00
Job Travel LCOM	Job Travel-Commercial	0.00
Permit	Permit	0.00
MON-Taxable	Monitoring	0.00
Lease	Equipment/System Lease	0.00
Service Agreement	Service Contract	0.00
Advance Deposit	Advance Deposit	0.00
Install Labor	Install Labor	0.00

Item [Dropdown] Amount \$8.00 Save New Remove

Apply View Copy Delete

5. If there are items showing for RMR in this tab, then the RMR Item 086 will need to be added as well, if not showing in the list.

6. Click on New in the Items Tab - Select the 086 RMR - Click on Save - Click on Apply

Job Type Description Inactive

Detail | Job Tasks | Costing | **Items** | Accounts | Commission Types | Phases |

Item Code	Description	Default Amount
Inst-Com-Fire	Install Fire System-Commercial	0.00
Job Labor		
Job Part		
Job Travel		
Permit		
MON-Tax		
Lease		
Service Agreement		
Advance Deposit		
Install Labor		
086	Recurring Mon Services II	48.00
Add-On	Add-On to System	0.00
ADJ-INSP	Adjustment - Inspection	0.00
ADJ-LCOM Job	Adjustment - Large	0.00
ADJ-RSC Job	Adjustment - Res/Small	0.00
ADJ-SVC	Adjustment - Service	0.00
Advance Deposit	Advance Deposit	0.00
AJB	Advance Job Billing (NT)	0.00

Item Amount Save New Remove

Apply New Copy Delete

7. After Saving the 086 RMR should now be showing in the list

Job Type Setup Inactive

Job Type Description Inactive

Detail | Job Tasks | Costing | **Items** | Accounts | Commission Types | Phases |

Item Code	Description	Default Amount
Inst-Com-Fire	Install Fire System-Commercial	0.00
Job Labor LCOM	Job Labor-Commercial	0.00
Job Part RSC	Job Part	0.00
Job Travel LCOM	Job Travel-Commercial	0.00
Permit	Permit	0.00
MON-Taxable	Monitoring	0.00
Lease	Equipment/System Lease	0.00
Service Agreement	Service Contract	0.00
Advance Deposit	Advance Deposit	0.00
Install Labor	Install Labor	0.00
086	Recurring Mon Services II	48.00

8. Reopen the Job - Click on the CO to add the RMR - Click on New - Click on Recurring Item drop-down - Select the 086 RMR that is now listed - Click on Save

Job - 807 (Diamond Pizza - 650-Main)

Job	Customer 650	Site
Job Number 807 Job Type Fire-Small-Com Job Status Job Complete System 650-1-1 Fire Sprinkler Labor Units 10.0 (3.25 Used)	Diamond Pizza Diamond Pizza - 650-Main 2600 ROCKSIDE RD ADDED IN MAN Garfield Heights, OH 44125 (330) 555-1515	Diamond Pizza - 650-Main 2600 ROCKSIDE RD CHANGED THIS IN MAN Garfield Heights, OH 44125

CO 807 - 9 - Recurrings

Item Code	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amount	Cycle

CO 807 - 3

CO 807 - 4

CO 807 - 5

CO 807 - 6

CO 807 - 7

CO 807 - 8

CO 807 - 9

Labor

Cost Details

Journals

Tools

Quotes

Recurring Item

Item 086

Description Recurring Mon Services II

Rate 48.00

Sub Item Of

Lease Equipment/System Lease 0.00

MON-Taxable Monitoring 0.00

Permit Permit 0.00

Service Agreement Service Contract 0.00

Bill Cycle

Cycle Start

Enter as Monthly Amt Only

Delete

Tax Exempt

• **NOTE:**

If no restrictions are wanted for a job type, do not add any RMR Items in the Job Type - Items Tab. If no RMR items are listed then all RMR items will be available in Jobs, for change orders or recurring in the initial setup.