

R O M E

2022 WORKBOOK

CANONS OF SUCCESS

**DEALER TRACK
USER GUIDE**

2022



DEALER TRACK USER GUIDE

Linking a Repair Order

You want to link an RO as soon as you enter it into Rome. This will give you time to deal with any issues that come up before you need to send it over. Highlight the RO in the RO list box and press the DT RO button to bring up the Dealer Track window

RO (0009749 - WBA3B5C53DJ598349)

SYLVIA BUDD
135 WINDSOR DRIVE
AUBURN NH 03032

WBA3B5C53DJ598349
13 BMW 3 Series 328i x
Mileage: 1
Writer: H Roderick

General | G/L and Payment Over-Rides | Profile Export Flags

Customer Type
 Unknown Individual Company

Billing Type
 Retail Wholesale

New/Used Car
 New Used Demo Rental

RO Payment
 Unknown Cust Pay Internal Sale

Vehicle Status
 Inventory Customer Internal (No Cust #)

Customer Number: ...

Dealer Track RO: ...

G/L Export Date: ...

Vehicle Number: ... (Customer #)

Transaction Date: ...

OK Cancel

There are two sections on this screen we need to worry about. New/Used Car designates the Type of vehicle when it sends the information to Dealer Track. If the job is an internal job you are doing for the dealership you need to set the type if it is a new or used car. A lot of dealerships use this designation to know what cars get posted on their website in the New or Used sections.

In the Vehicle Status section if the job is an Internal select the Internal (No Cust#) option. This will turn off the customer and vehicle number fields below and they won't be needed to link the RO.

On a non-internal job, you will need to press the button to the right of the Customer number field.

NOTE: Selecting the "Internal (No Cust #)" button must be done before selecting any customer number or vehicle status.

Customer Search

RO Information

SYLVIA BUDD 603-627-2834
 135 WINDSOR DRIVE
 AUBURN, NH 03032

Customer Search

Last Name: BUDD First Name: SYLVIA
 Phone: E-Mail:

by Customer | by Name | by Address | by Home Phone | by Cell Phone | by EMail

Customer	Name	Address	City, State, Zip	Home Phone	Cell Phone	E-Mail
1280785	BUDD, SYLVIA	135 WINDSOR DR	AUBURN, NH 03032	6036272834	6033911489	

Reset List Select Insert

Print Close

This will search Dealer Track by the customers name and return a list of matches. If the correct customer isn't listed, you can try to search by just the last name by removing the first name and pressing the Reset List button. If you still do not see the customer, if you want you can press the Insert button and it will add it to Dealer Track for you. Press Close and it will go back to the previous screen and the customer number will be displayed. NOTE: The customer database in the DMS is a valuable sales and marketing tool. It is always recommended to perform a basic search to ensure that there is not already another existing customer number before simply inserting a new one.

Press the button to the right of the Vehicle number field and it will decode the VIN and enter the customer number in the field.

Then press the button to the right of the Dealer Track RO field and it will enter the RO number with RM in front of it. The RO is now linked and ready to send over when the job is finished.

When you return to the RO list the last name will be green and the VIN will be light blue. The interface will attempt to make the date of the transaction in Dealer Track match the Date Out in Rome. The Transaction Date is an override that will set the date of the transaction date in Dealer Track to the date in this field. Dealer Track will allow you to enter transactions into the previous month if that month is still open. It typically takes the accounting dept a week to close out the previous month so keep that in mind. It is also a good idea to inform the accounting dept that you are doing this so they aren't chasing ghosts trying to figure out why the monthly numbers are changing.

ROME

Overriding the A/R account

If the RO needs to go to a different A/R account then the normal body shop A/R, (internal, Lot damage, policy) you can change it. Go to the DT RO button and go to the G/L and Payment Override tab

RO (0009741 - 3MZBN1K74JM216682)

3M8066 TULLEY
147 DANIEL WEBSTER HIGHWAY
NASHUA NH 03060

3MZBN1K74JM216682
16 MAZDA 3
Mileage: 1
Writer: Olivia C

General | G/L and Payment Over-Rides | Profile Export Flags

Company: Document:
A/R Journal: ... A/R Account:

RO Payments

Date	Description	CO	Document	A/R		Balance		Amount	Exported
				Jrnl	Account	Jrnl	Account		
2/08/19	PO 7027435							59.95	

You need to select the A/R Journal, you can hit the button at the end of the field and it will bring up the list of journals. Select the one you want. It will enter that journal in the A/R Journal field and will activate the A/R Account field, so you can enter the A/R account you want to send the RO to. When you export the RO the total of the RO will go over to the new account and not the regular A/R account.

Exporting a Repair Order

When the job is complete it can be exported to Dealer Track. The RO must have a Date Out to be exported to Dealer Track. Go to the Accounting button > RO Export

Repair Orders

Utilities

Export Options

Starting Date: Ending Date: Include RO's with Cost Only

RO	Last Name	VIN	Make	Model	Trns Date	Date Out	Balance	Grand Total
<input checked="" type="checkbox"/> 0009486.00	LENSAK	JM3KE4BY4G073085	MAZD	CX-5 Sport Auto		2/11/19	5,430.57	5,430.57
<input type="checkbox"/> 0009617.00	STOWELL	5UXKR0C35H0V7947	BMW	X5 xDrive35i Sp		2/11/19	1,118.53	1,118.53
<input type="checkbox"/> 0009619.00	STOWELL	5UXKR0C35H0V7947	BMW	X5 xDrive35i Sp		2/11/19	2,343.82	2,343.82

Tag Untag Flip Prev Tag Tagged Load Tags Export

Tag All Untag All Flip All Next Tag Save Tags Close

The export screen will show jobs for today that are ready to be exported. If you do not see the RO you are looking for set the Starting Date to the beginning of the month and it will show all jobs dated out this month that have not been sent to Dealer Track.

Check off the RO's you want to export and press the Export button. It will export each RO to Dealer Track and then print out a summary of ones that were successfully exported and ones that got an error. Always preview the export log to ensure that no errors occurred. The accounting department may request that you submit this report every day so they can ensure that Rome has posted to accounting correctly. If any errors occur then contact Rome Technical Support for a resolution.

When the RO is successfully exported, the VIN on the RO list will change to green to let you know it has been exported.

Exporting Payments

Go to Accounting > Payment Export

Payments

Utilities

Export Options

Starting Date: 2/11/19 Show Payments

Ending Date: 2/11/19 Show Credits

RO	Date	Received By	Description	Payment Type	Amount
<input checked="" type="checkbox"/> 0009221.00	2/11/19	R. Parziale	Ins Ck# 0024355109	Check	1,653.94
<input type="checkbox"/> 0009529.00	2/11/19	Kayla Gauvin	VISA	Credit Card	4,039.75
<input type="checkbox"/> 0009559.00	2/11/19	R. Parziale	Ins Ck# 0024351248	Check	663.82
<input type="checkbox"/> 0009588.00	2/11/19	R. Parziale	Ins Ck# 7375193	Check	10,819.94
<input type="checkbox"/> 0009588.00	2/11/19	Kayla Gauvin	VISA	Credit Card	1,000.00
<input type="checkbox"/> 0009668.00	2/11/19	R. Parziale	Ins Ck# 26576941	Check	1,963.49
<input type="checkbox"/> 0009728.00	2/11/19	Kayla Gauvin	CASH	Cash	110.00

Tag Untag Flip Prev Tag Tagged Load Tags Export

Tag All Untag All Flip All Next Tag Save Tags Close

Its same as exporting RO's, just check off the ones you want to send and press Export. One difference is that you can send a payment over even if the RO is not Dated out.

Resending an Exported RO

If you have already exported a RO but need to send it over again here is how you do it. In the DT RO screen clear out the GL Export date field. Then go to the Profile Export Flags tab

RO (0009741 - 3MZBN1K74JM216682)

3M8066 TULLEY
147 DANIEL WEBSTER HIGHWAY
NASHUA NH 03060

3MZBN1K74JM216682
16 MAZDA 3
Mileage: 1
Writer: Olivia C

General | G/L and Payment Over-Rides | Profile Export Flags

Account	Description	Amount	Export Status	Cost	Export Status
4600A	BODY LABOR	48.00	Exported	0.00	Exported
4600B	PAINT LABOR	0.00	Exported	0.00	Exported
4600C	FRAME LABOR	0.00	Exported	0.00	Exported
4600D	MECH LABOR	0.00	Exported	0.00	Exported
4710A	OEM PARTS	11.95	Exported	9.56	Exported
4710B	LKQ PARTS	0.00	Exported	0.00	Exported
4710C	AM PARTS	0.00	Exported	0.00	Exported
4710D	USED PARTS	0.00	Exported	0.00	Exported
4660A	SUBLET	0.00	Exported	0.00	Exported
4670A	PAINT MATERIAL	0.00	Exported	0.00	Exported
4670B	HAZ WASTE	0.00	Exported	0.00	Exported
4800A	STORAGE	0.00	Exported	0.00	Exported
4600H	Policy Labor	0.00	Exported	0.00	Exported
065EA	AD DISCOUNT	0.00	Exported	0.00	Exported
4900	Policy	0.00	Exported	0.00	Exported
<NONE>	<NONE>	0.00	Exported	0.00	Exported

Reset Change OK Cancel

Press the reset button and it will change the export status for all the accounts to Not Exported. Now it will let you re-send the RO to Dealer Track.

NOTE: If the RO was exported previously and it has not been removed there will now be 2 duplicate RO's in Dealer Track.

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