ROME

PARTS

Deleted with Cost Transaction Matching

2021

FEATURE EXPLANATION: DELETED TRANSACTION MATCHING

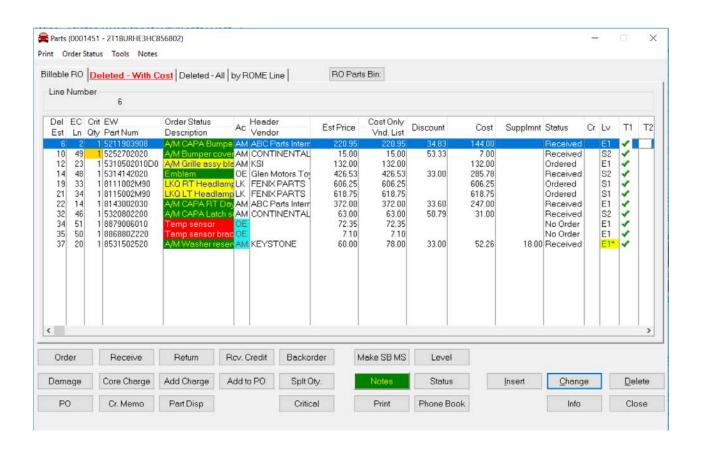
The "Deleted Transaction Matching" feature is new to the parts area of the Rome RO and is explained and demonstrated below.

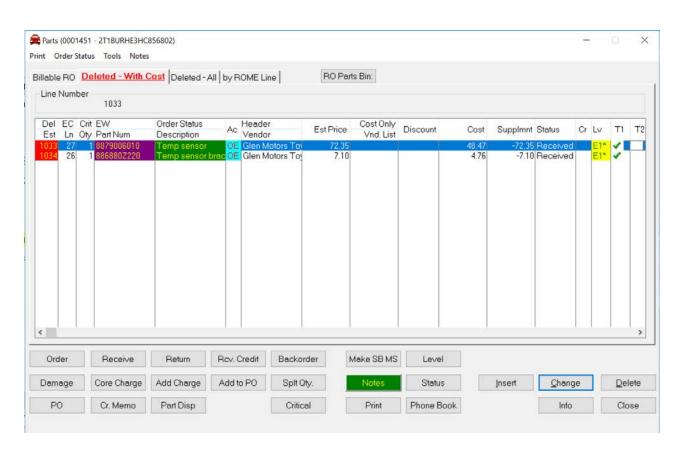
When an estimate or supplement EMS or Export is imported into an RO, any parts item that has been identified as having been removed or changed during the conversion will be automatically moved to the "Deleted" or "Deleted with Cost" tab of parts. The parts "types" are OEM, Opt OEM, A/M, LKQ, Used or Recon. Often, the original part may have already been ordered and/or received from the intended vendor (ie. The part was written as A/M but was already ordered or received from the OEM vendor as a "OEM price match" part) and in reality does not need to be reordered or received.

The "Deleted Transaction Matching" feature is intended to be used by the parts person to easily switch the ordered or received part between the "Billable RO" tab and the "Deleted with Cost" tab.

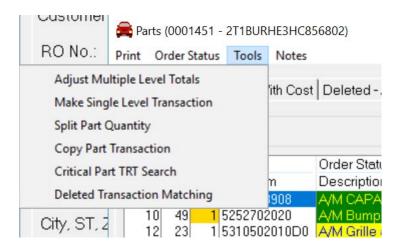
There is a setting in Rome to allow this window to automatically appear whenever the parts button is next opened after the est/suppl conversion has occurred.

In the example below, the estimator removed the Temp Sensor and Bracket from the supplement conversion and the parts had already been received.

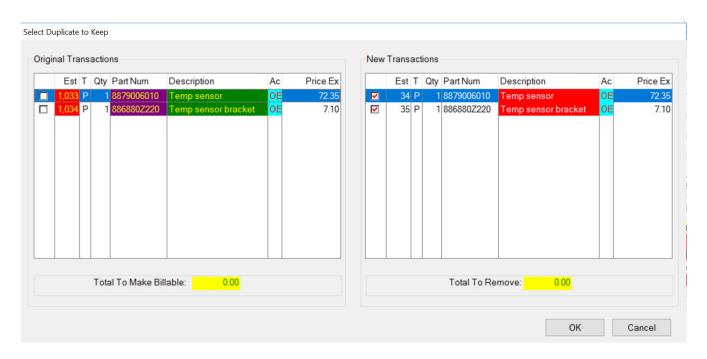




To manually open the DELETED TRANSACTION MATCHING feature, go to the Parts button, click on "TOOLS" at the upper left and select "Deleted Transaction Matching".



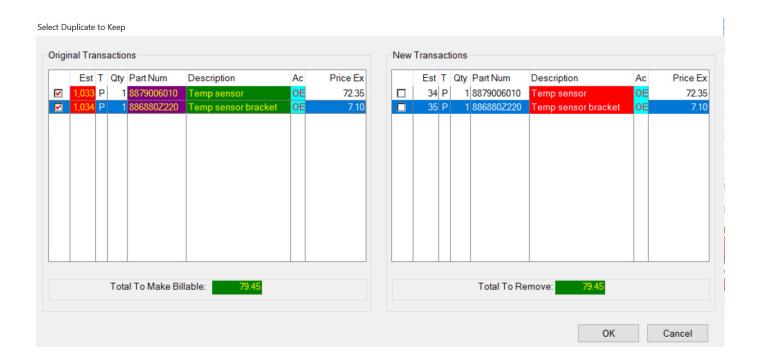
The Deleted Transaction Matching window will display any transactions that qualify. To qualify, the original transaction must have previously existed and was then removed or changed in a later version of the estimate or supplement.



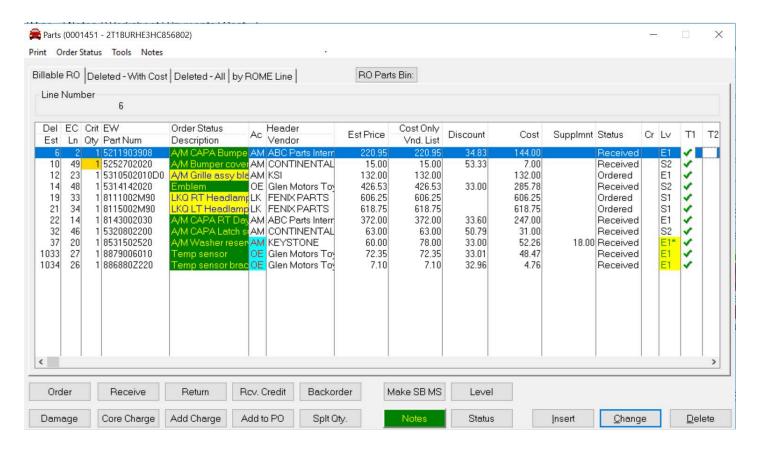
The KEY step here is to ONLY click on the items that you want to remain on the "Billable RO" TAB from either the left or right boxes. In the example below I want to keep the two parts in green that have already been received. The estimator in this example had been told by the technician that he did not need these two parts but after the estimator removed them from the RO the parts person updated him that the tech wanted to keep them there until the reassembly was complete and the post scan was successful, so the estimator put the parts back.

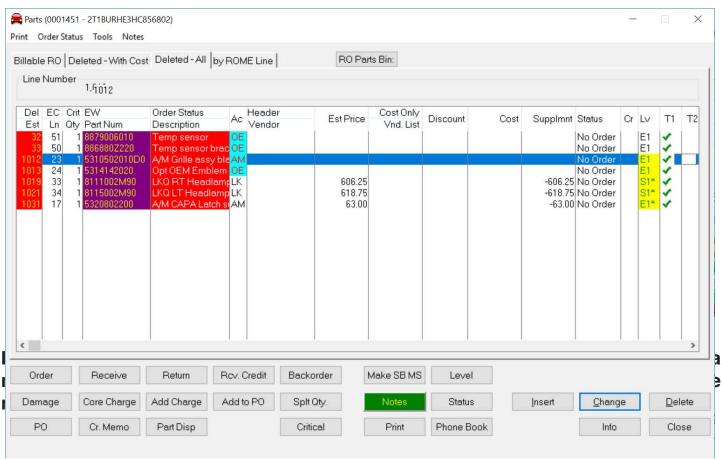


NOTE: The "Total to Make Billable" on the left pane and the "Total to Remove" on the right pane are green. If these amounts are Red in either pane it would indicate that a review of the transactions would be advisable.



Below is the resulting "Billable RO" screen and the two unordered parts are now on the "Deleted All" tab since they were never ordered.





ROME



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