ROME

2022 WORKBOOK

CANONS OF SUCCESS

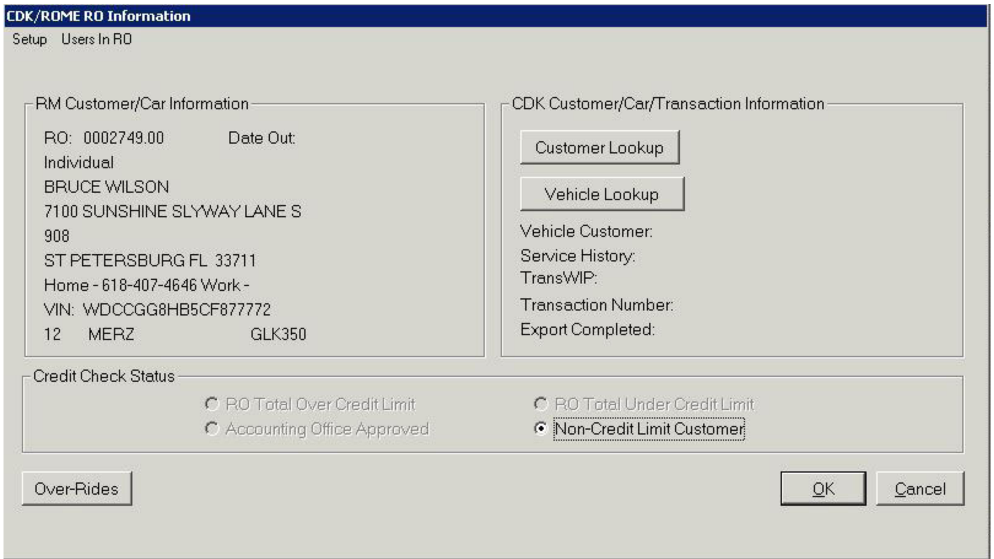
CDK USER GUIDE

2022

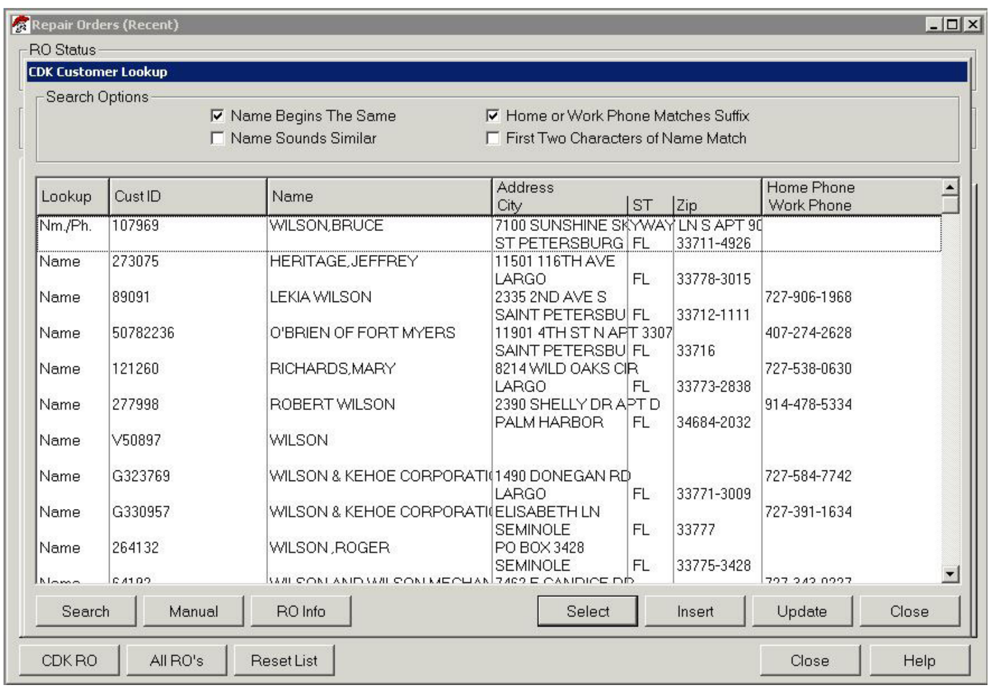
CDK USER GUIDE

Linking RO to CDK

Highlight the RO in the list box and press the CDK RO button.

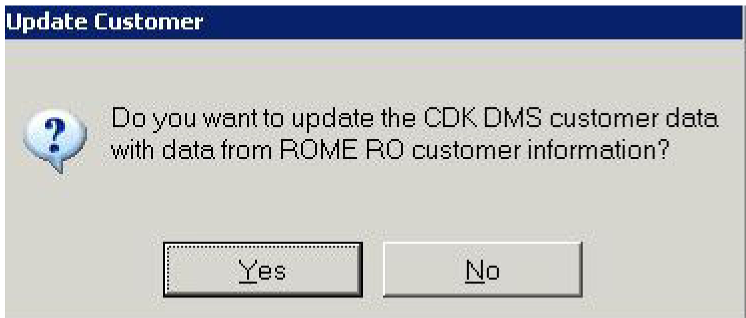


Press the Customer Lookup button to search for the customer. CDK will return a list of possible matches.



Check the names, address and phone numbers to verify the correct customer. If you do not see the customer and don't like any of the suggestions, check the "Name Begins the Same" and "First Two Characters of Name Match" boxes and press the search button. This will widen the search. When you find the one you want; highlight it and hit Select to choose it.

If you know the customer number that you want to connect to, you can press Manual and enter the number. When you select a number and hit enter the following window will be displayed:



This is the interface offering you an opportunity to update the information in CDK with the information in Rome. **DO NOT** do this unless you are absolutely sure the information in CDK is wrong.

If you can't find a good match you can press the Insert button and it will add the customer into CDK using the information in Rome.

When you return to the CDK RO window the customer number you selected will be to the right of the button.

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.

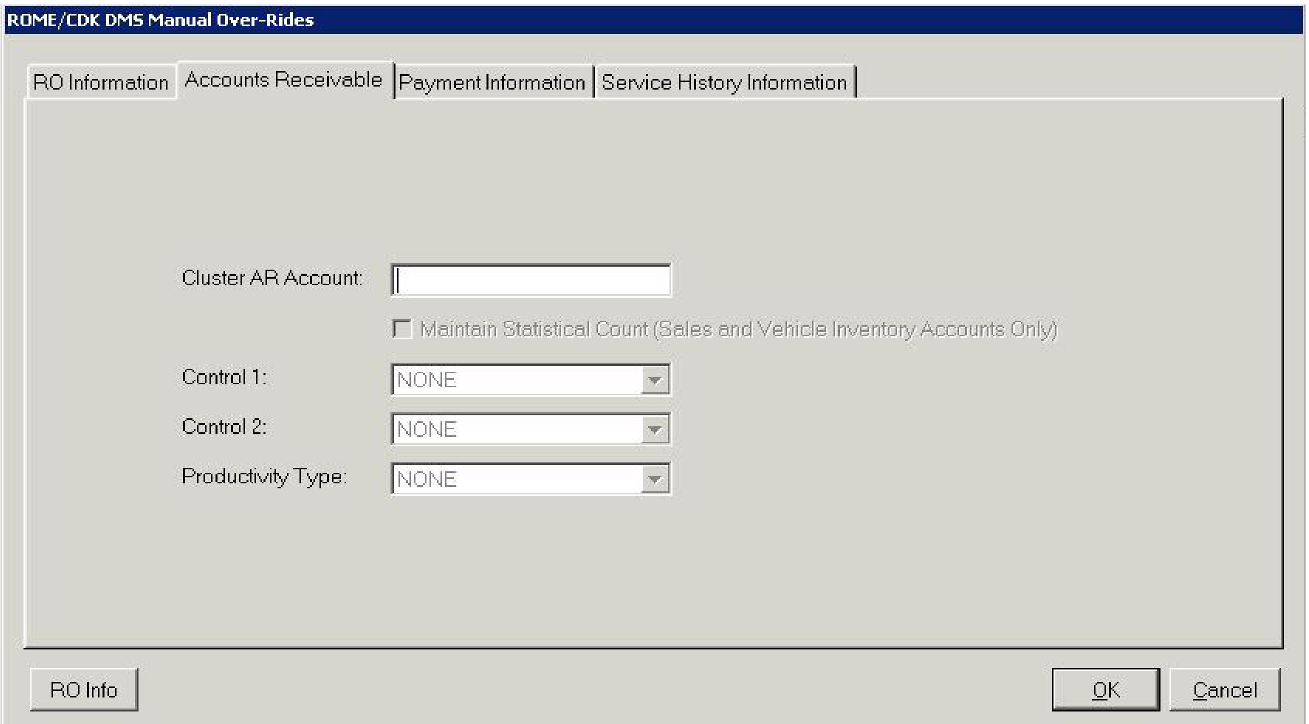
Press the Vehicle lookup button and the VIN will be searched for in CDK and added if it is not present. This should happen without you doing anything. If it is successful, the last 8 of the VIN will be displayed to the right of the Vehicle Lookup button.

When you return to the RO list the Name and VIN field should be yellow. This lets you know the RO is successfully linked to a valid customer and VIN in CDK.

Overriding the Default A/R

Sometimes you need to send the total of the RO to a different account then the normal A/R account. You might need to send it to Policy, New Car Inventory or Lot Damage. These accounts need to be entered in the Cluster Accounts in Rome before they can be used.

Highlight the RO on the list box and hit the CDK RO button. On the next screen hit the Overrides button, and go into the Accounts Receivable tab.



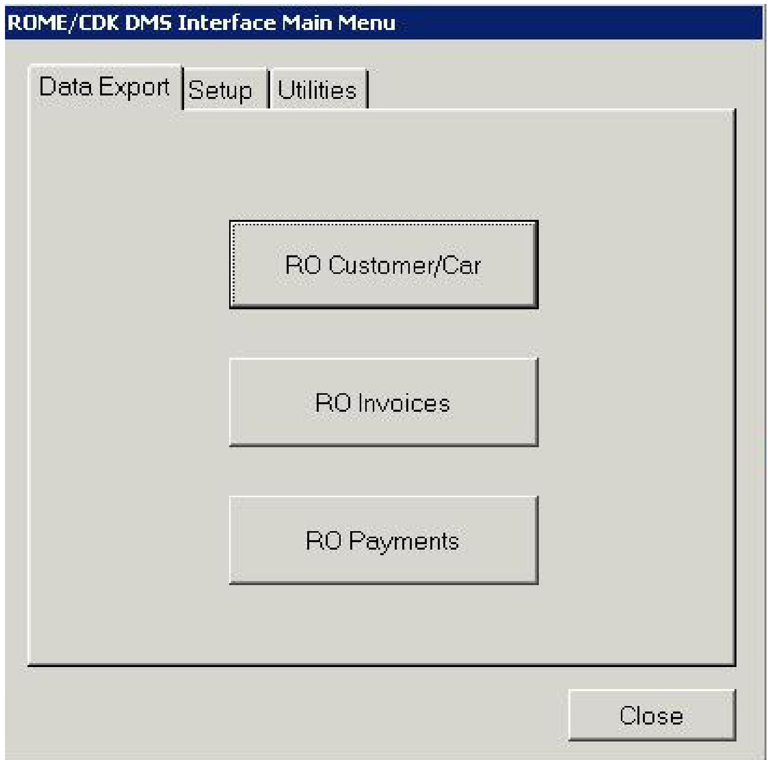
Enter the account you want the RO total to go to in the Cluster AR account field. If the account isn’t in the list, you must add it to the Cluster Accounts in Rome. If the account has a control in CDK you must select an option from the dropdown.

Possible Controls are: CDK RO number, Customer number, Tech Emp ID, Writer Emp ID, Stock number, or up to 6 other custom control fields. User Fields 1-6 exist within a specific Rome RO on the “Misc” tab. Often, the “User Field 1” has been relabelled “Debit Ctrl #” for the purpose of controlling an A/R override to a specific inventory stock number or service sublet DMS RO number.

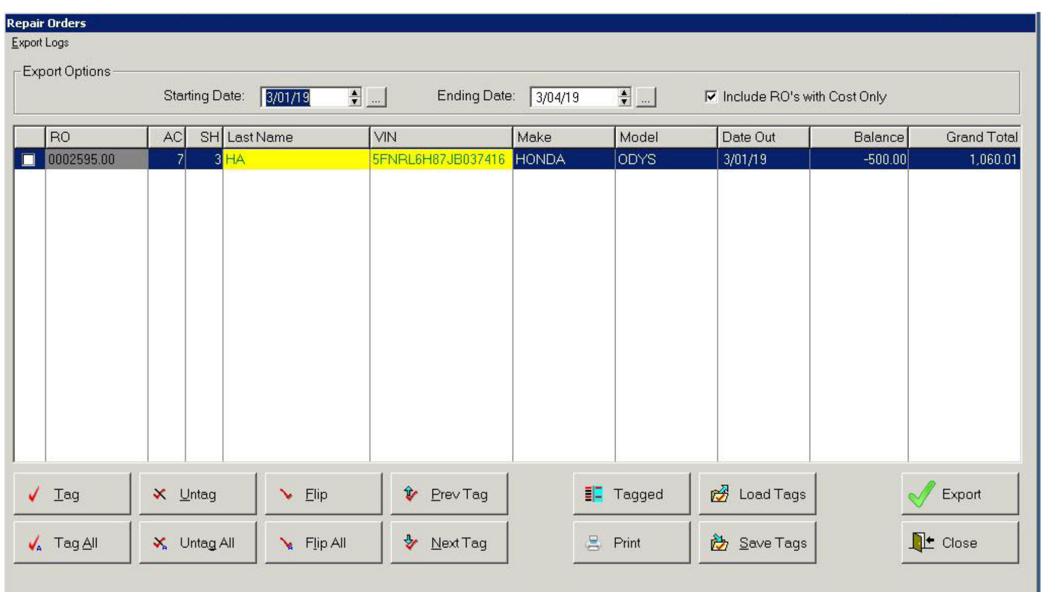
Exporting the RO to CDK

After the job is complete, you will export the RO over to CDK to send the financials and the service history. The RO must have a Date Out to be exported. You may export several RO at a time if you want.

Press the Accounting button at the top of Rome.



Press RO Invoices to bring up RO's available for export.



It defaults to today's date so if you don't see what your looking for change the Starting Date back to include the Date Out of the RO's you want to export, and they should appear. Check the RO's that you want to send, you can hit the Tag All button at the bottom to select them all. Hit the Export button to send them to CDK. You will see a status bar as it sends the files and you will get report card of if it was successful or not.

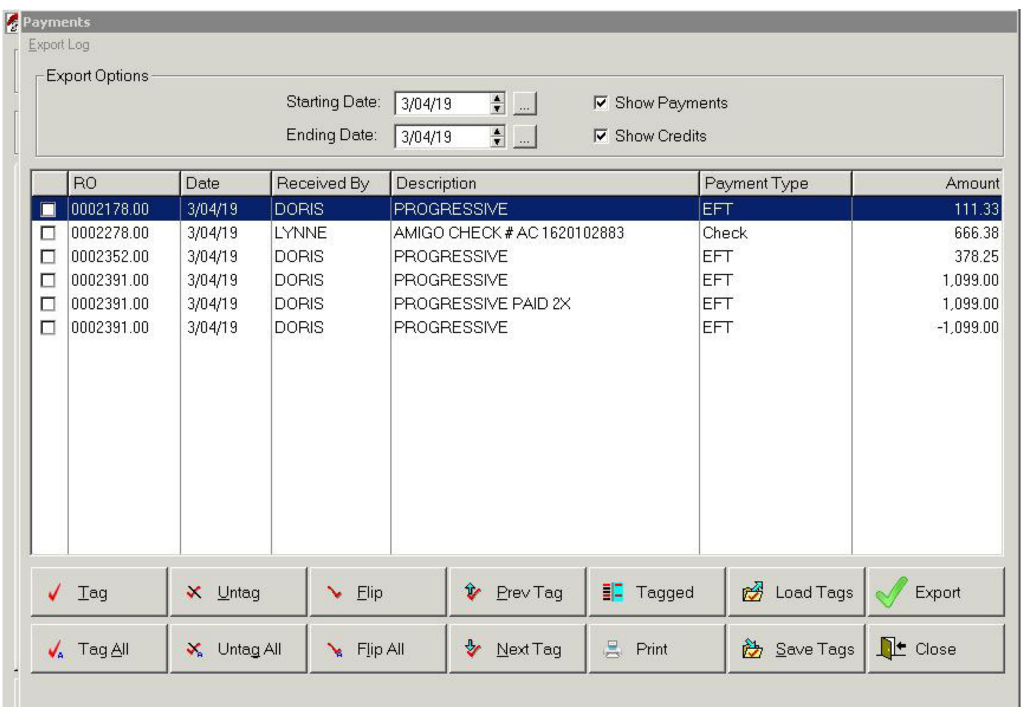
On the report card the WIP transaction is the financial information going over. The Service History is the service history information going over.

When you return to the RO list box if the money was sent over correctly the name will be green. If the service history went over the VIN will be green.

NOTE: The DMS usually posts the information to accounting in a real-time manner. This means that the "Date Out" in Rome does not influence which accounting month the sales export posts in. The actual date of the export determines which accounting month of the postings. This means that you have until midnight on the last day of the month to post sales to that month.

Exporting Payments

There is a setting in Rome that will attempt to send any payments over when the RO Invoice is exported. If that is turned on when you send the RO over it will send any payments in that RO at the same time. If you have this option turned off or the payment comes in after the RO is exported; you will need to send the payments manually. To do this go to the Accounting button at the top of Rome and select RO Payments on the next screen.



Like the RO Export screen, it will default to today and you will need to change the Date Range if you don't see the payment you want. Check off the payments you want to export and hit Export.

ROME

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