

R O M E

2022 WORKBOOK

CANONS OF SUCCESS

CDK USER GUIDE

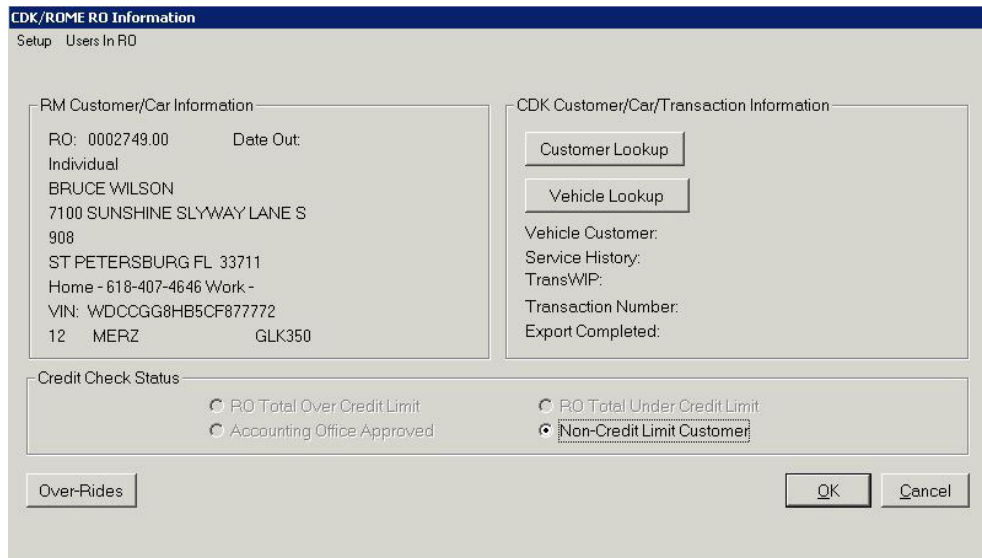
2022



CDK USER GUIDE

Linking RO to CDK

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



The dialog box is titled "CDK/ROME RO Information" and has two tabs: "Setup" and "Users In RO". The "Setup" tab is active. It is divided into two main sections: "RM Customer/Car Information" and "CDK Customer/Car/Transaction Information".

RM Customer/Car Information:

- RO: 0002749.00
- Date Out:
- Individual
- BRUCE WILSON
- 7100 SUNSHINE SKYWAY LANE S
- 908
- ST PETERSBURG FL 33711
- Home - 618-407-4646 Work -
- VIN: WDCCG8HB5CF877772
- 12 MERZ GLK350

CDK Customer/Car/Transaction Information:

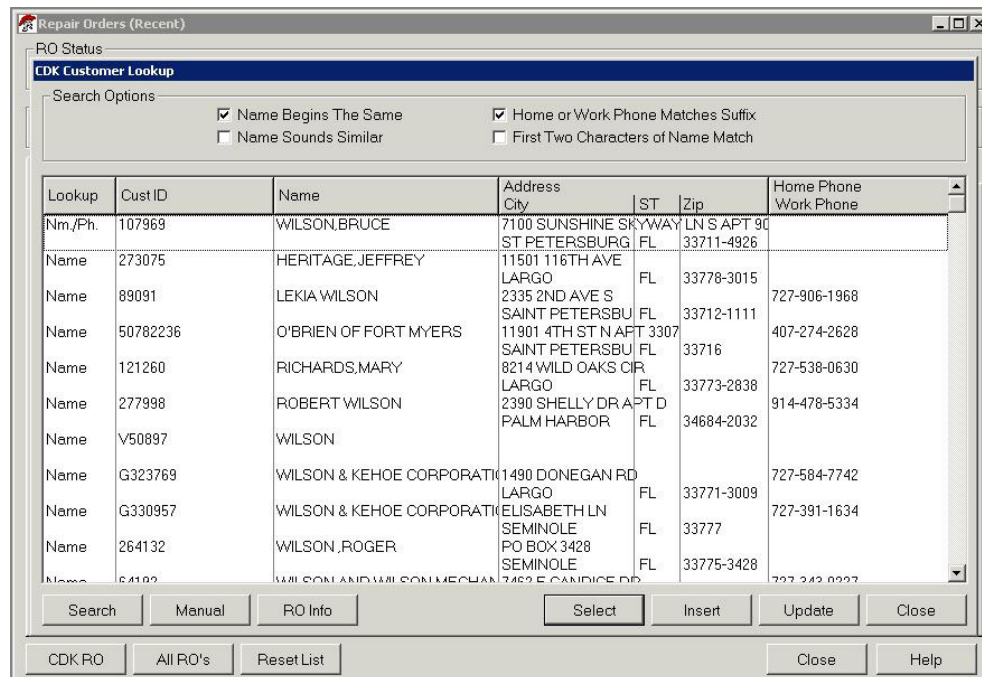
- Buttons: Customer Lookup, Vehicle Lookup
- Vehicle Customer:
- Service History:
- TransWIP:
- Transaction Number:
- Export Completed:

Credit Check Status:

- ☐ RO Total Over Credit Limit
- ☐ RO Total Under Credit Limit
- ☒ Non-Credit Limit Customer
- ☐ Accounting Office Approved

Buttons at the bottom: Over-Rides, OK, Cancel.

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



The dialog box is titled "Repair Orders (Recent)" and has a tab "CDK Customer Lookup". It contains search options and a table of results.

Search Options:

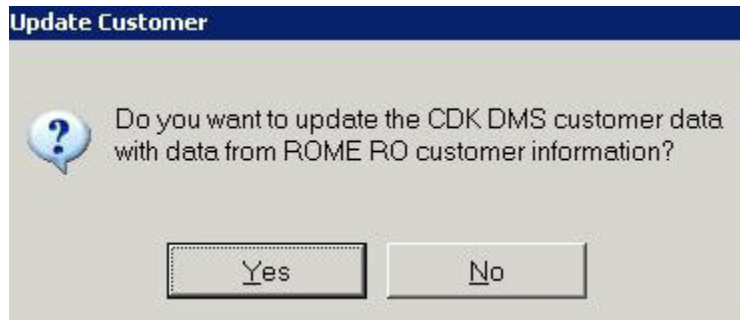
- ☒ Name Begins The Same
- ☒ Home or Work Phone Matches Suffix
- ☐ Name Sounds Similar
- ☐ First Two Characters of Name Match

Lookup	Cust ID	Name	Address City	ST	Zip	Home Phone	Work Phone
Nm./Ph.	107969	WILSON, BRUCE	7100 SUNSHINE SKYWAY LN S APT 90	ST PETERSBURG	FL	33711-4926	
Name	273075	HERITAGE, JEFFREY	11501 116TH AVE	LARGO	FL	33778-3015	
Name	89091	LEKIA WILSON	2335 2ND AVE S	SAINT PETERSBU	FL	33712-1111	727-906-1968
Name	50782236	O'BRIEN OF FORT MYERS	11901 4TH ST N APT 3307	SAINT PETERSBU	FL	33716	407-274-2628
Name	121260	RICHARDS, MARY	8214 WILD OAKS CIR	LARGO	FL	33773-2838	727-538-0630
Name	277998	ROBERT WILSON	2390 SHELLY DR APT D	PALM HARBOR	FL	34684-2032	914-478-5334
Name	V50897	WILSON					
Name	G323769	WILSON & KEHOE CORPORATIO	1490 DONEGAN RD	LARGO	FL	33771-3009	727-584-7742
Name	G330957	WILSON & KEHOE CORPORATIO	ELISABETH LN	SEMINOLE	FL	33777	727-391-1634
Name	264132	WILSON, ROGER	PO BOX 3428	SEMINOLE	FL	33775-3428	
Name	64182	WILSON AND WILSON MECHAN	7462 E CANDICE DR				727-342-0227

Buttons at the bottom: Search, Manual, RO Info, Select, Insert, Update, Close, CDK RO, All RO's, Reset List, Close, Help.

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 than 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.

The screenshot shows a software window titled "ROME/CDK DMS Manual Over-Rides". It has four tabs: "RO Information", "Accounts Receivable" (which is selected), "Payment Information", and "Service History Information". The "Accounts Receivable" tab contains the following fields:

- "Cluster AR Account:" followed by a text input field.
- A checkbox labeled "Maintain Statistical Count (Sales and Vehicle Inventory Accounts Only)".
- "Control 1:" followed by a dropdown menu currently showing "NONE".
- "Control 2:" followed by a dropdown menu currently showing "NONE".
- "Productivity Type:" followed by a dropdown menu currently showing "NONE".

At the bottom of the window, there is a button labeled "RO Info" on the left, and "OK" and "Cancel" buttons on the right.

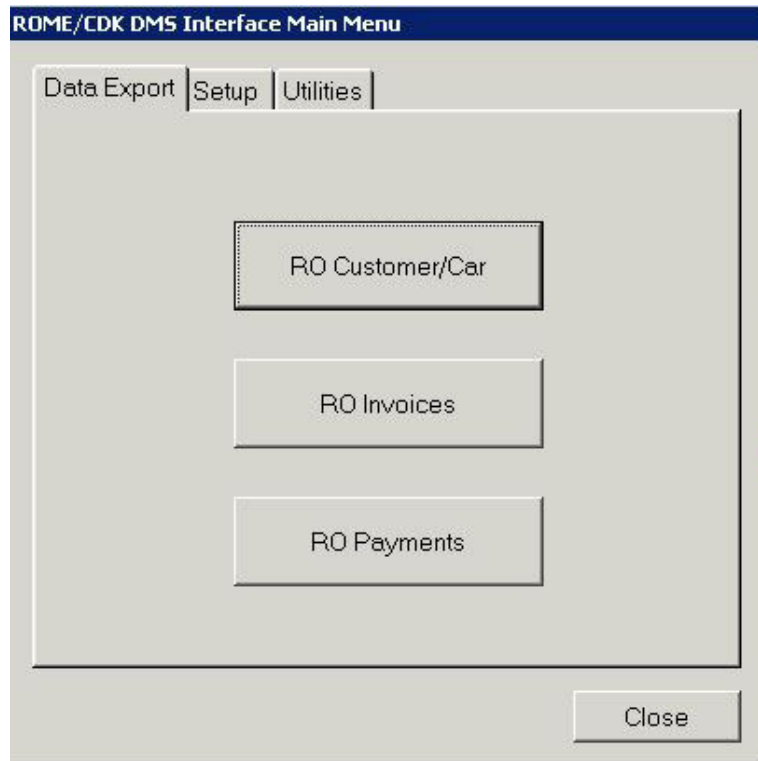
Enter the account you want the RO total to go to in the Cluster AR account field. If the account isn't in the list, you must add it to the Cluster Accounts in Rome. If the account has a control in CDK you must select an option from the dropdown.

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.

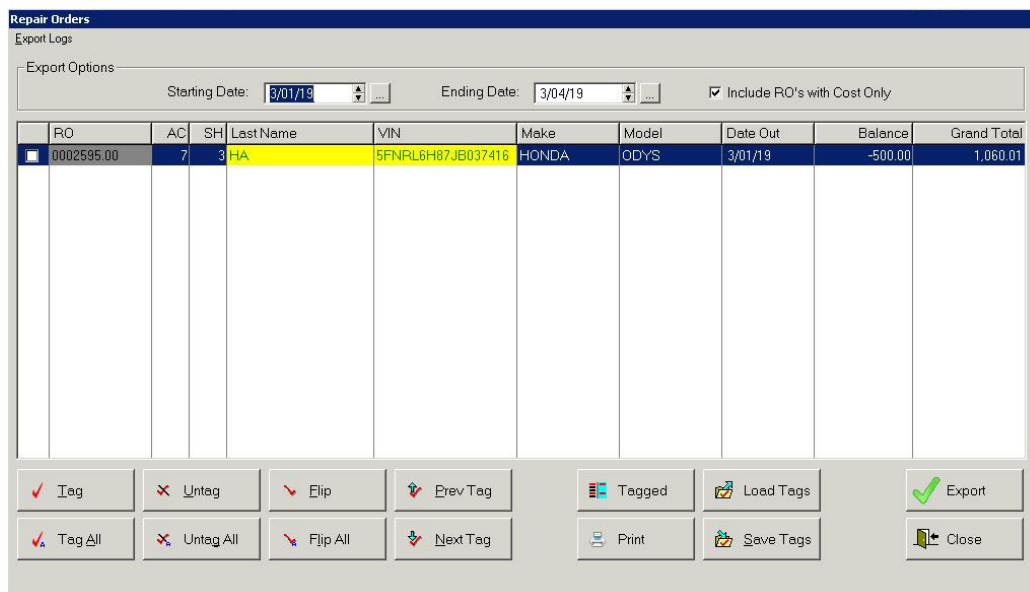
Exporting the RO to CDK

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.

RO	Date	Received By	Description	Payment Type	Amount
<input checked="" type="checkbox"/> 0002178.00	3/04/19	DORIS	PROGRESSIVE	EFT	111.33
<input type="checkbox"/> 0002278.00	3/04/19	LYNNE	AMIGO CHECK # AC 1620102883	Check	666.38
<input type="checkbox"/> 0002352.00	3/04/19	DORIS	PROGRESSIVE	EFT	378.25
<input type="checkbox"/> 0002391.00	3/04/19	DORIS	PROGRESSIVE	EFT	1,099.00
<input type="checkbox"/> 0002391.00	3/04/19	DORIS	PROGRESSIVE PAID 2X	EFT	1,099.00
<input type="checkbox"/> 0002391.00	3/04/19	DORIS	PROGRESSIVE	EFT	-1,099.00

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.

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