ROME

ROME MANAGEMENT
USER GUIDE

2022

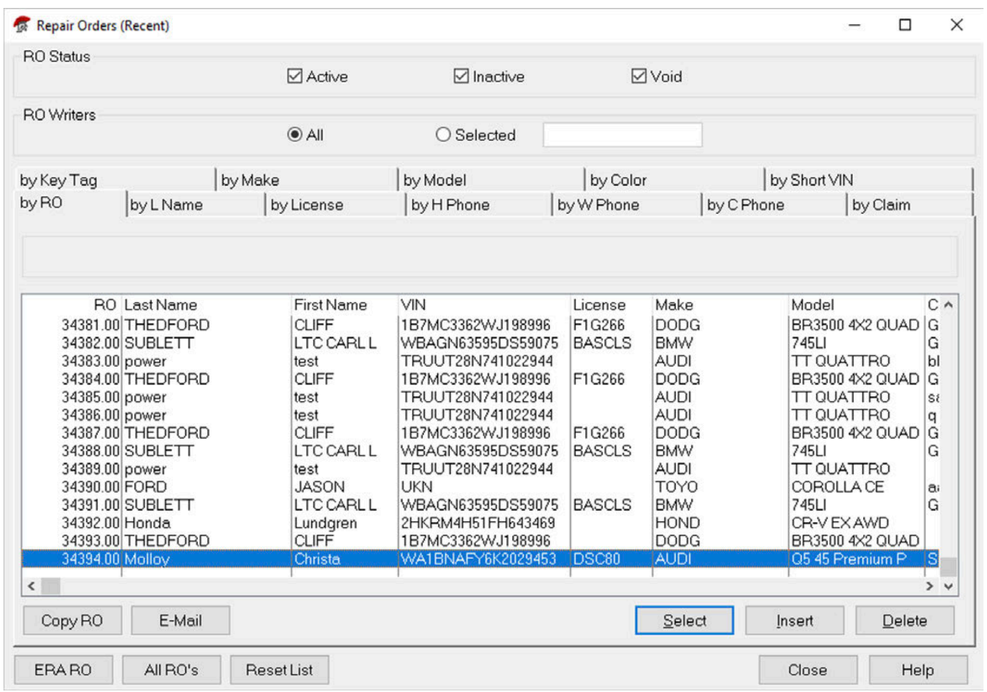
REPAIR ORDER

REPAIR ORDER

REPAIR ORDER LIST BOX

The RO list box defaults to display all active ROs and ROs with a Date Out within the last 60 days. There are two filters at the top of this screen: RO Status and RO Writers RO status will allow you to display or hide Active, Inactive and Void ROs if you check and uncheck the appropriate boxes. The RO Writers filter will allow you to display a single writers ROs. Put the dot in Selected and enter the Writers name in the field and any RO that has that writers name if either the Writer 1 or Writer 2 field will be displayed.

The top of the list box has tabs along the top that will sort the ROs by that category. The categories are: RO number, VIN, Last name, License plate number, Home Phone, Work Phone, Claim#, Key tag#, Make and Model. Once you select a tab to sort by you can type the first few characters of what you what to find and Rome Management will go to the first RO that starts with those letters.



For instance, if you wanted to find an RO for a customer named John White. You would click the by Last name tab in the RO list box and then type the letters “WHI”. It will find and stop on the first record that starts with “WHI”. It may stop on Whim mer but White should only be a couple of rows down.

Copy RO - This button is for creating a new RO with the same customer info as a previous RO. See “Creating a RO with the Copy RO button” for more information

Select - This will open the highlighted RO

Insert - This will create a new RO. See “Creating a RO from the RO list Box” for more information.

Delete - This will delete the highlighted RO from the system. The system will not let you delete an RO if you do not have permissions or if there is ANY cost applied to the RO. You must un-order all parts and un-assign all techs before you can delete an RO.

ERA RO or ADP RO - If your shop interfaces with Reynolds & Reynolds ERA or ADP Dealership Management System (DMS) you will have a button under the Copy RO button for linking tickets to the DMS.

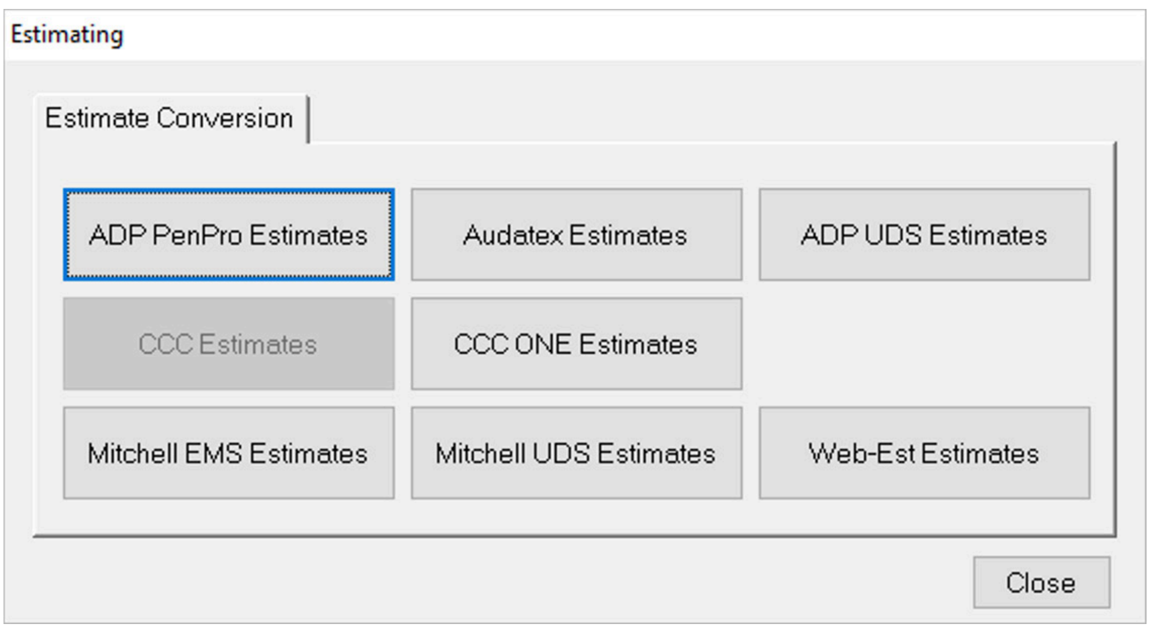
All ROs - This will open a new window that will display every RO in the system since you began using Complete Shop. So if you need to look at a ticket that was closed months ago you can use this button to access it.

Reset List - This will force a refresh of the list and add or remove ROs that may have been changed since you opened the RO list

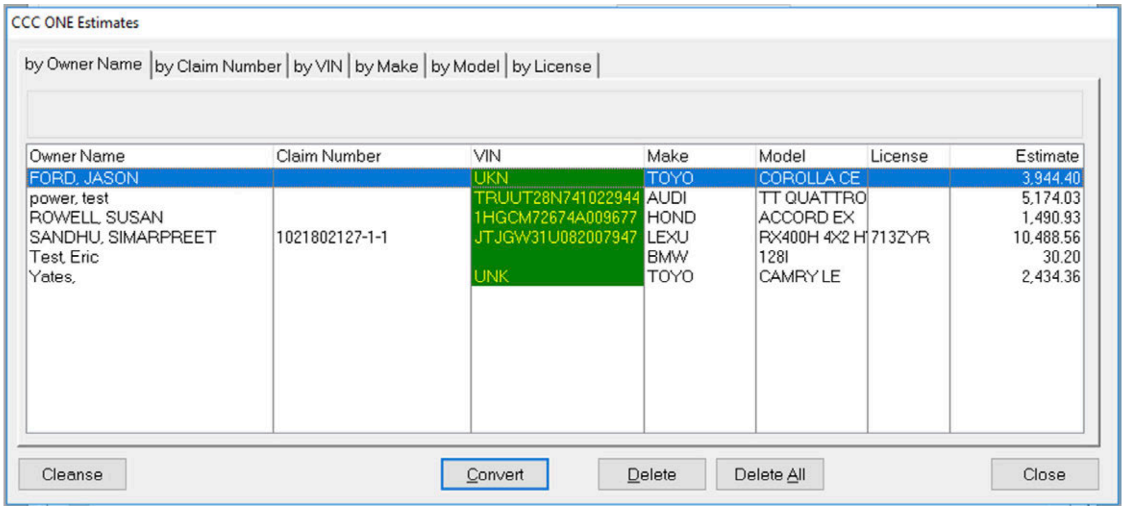
Close - Will close the RO list Box but not the whole program.

Help - Does not function at this time

ESTIMATING SCREENS



The Estimating window shows the different Estimating programs Rome Management interfaces with.



This screen lists all the estimates that have been exported from whatever estimating system you selected. Like the RO list screen it has tab at the top that when you select them will sort the list by category selected. The categories are: Owner name, claim number, VIN, Make, Model, license#. Once you select the tab you want to sort by you can type the first few letters you are looking for and it will go to the first estimate matching those letters.

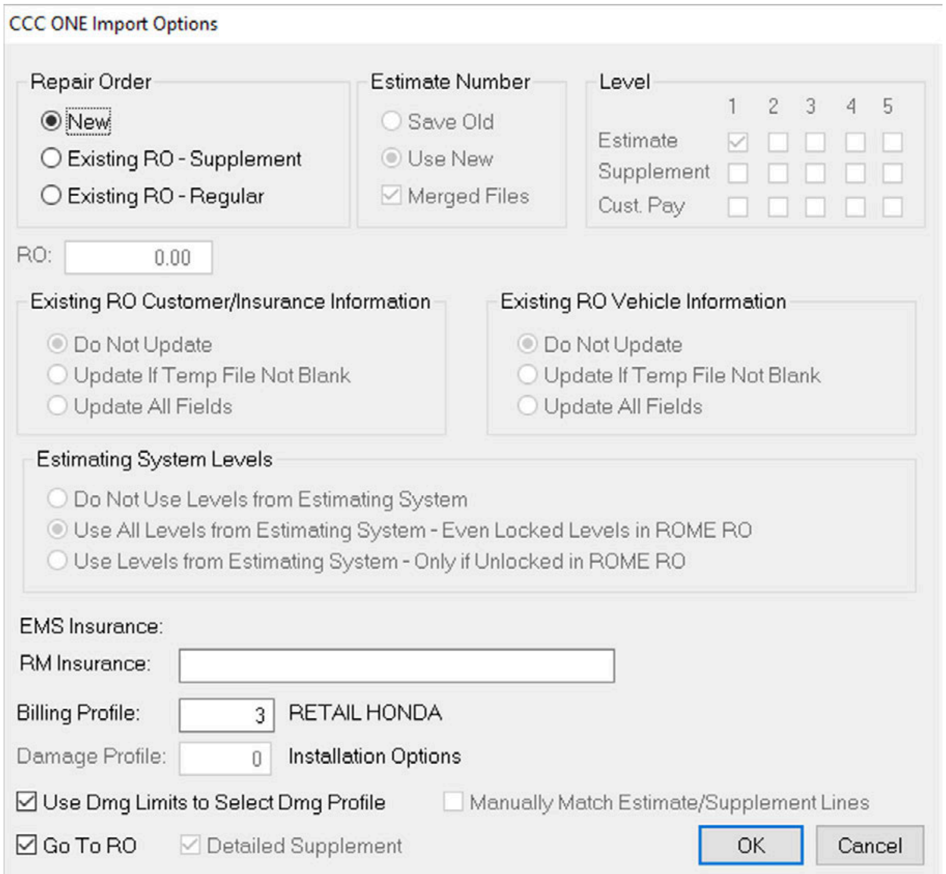
Cleanse - This will remove estimates that have never been imported, ROs that have been dated out at least seven days. Estimates for active jobs will stay in here so supplements can be brought in properly. This lets you clean out this list without interfering with active jobs. The time it takes for this window to open will be reduced if you clean it out.

Convert - This will start the conversion process on the highlighted RO. you will be taken to the import option screen. Generally new ROs should be opened from the Calendar.

Delete - This will delete the highlighted estimate from the list. Make sure the job is not active because this may affect the ability to bring in supplement properly.

Delete all - This will delete all of the estimates from this screen. This is not recommended if you have active jobs with possible supplement. Use the Cleanse button to remove unneeded estimates safely.

When you press the convert button you bring up the following window:



This screen lets you choose what kind of Repair Order you want to convert.

New - Creates a new repair order in the system.

Existing RO - Supplement- This option should not be used

Existing RO - Regular - This is will import estimate into an existing RO as an original estimate. You must specify which RO number you importing to.

Estimate Number Section - Tells Rome this estimate will be used to bring in any supplements. Since most ROs will only have one estimate assigned to them this should be set to “New.”

Estimate Number Merged Files - Tells Rome to merge duplicate lines into one. It is checked by default and should be let checked.

RO field - Will become active if the Existing RO is chosen. This is where the estimate will be imported into. If a number that doesn’t exist is typed, hit tab the RO list box will pop-up. Choose a valid RO number.

Existing RO customer/Insurance and vehicle information - If you are importing into an existing RO you can tell Rome Management to keep or overwrite the customer and vehicle information in the RO with the customer and vehicle information in the estimating system. If you are confident the Rome Management RO has correct and complete info you can select Do Not Update and that info will be preserved. If you think Rome Management is inaccurate or incomplete then you can choose one of the two updates options to overwrite Rome Management with the information in the estimating system.

Billing profile - This field will only be available if you are making a new RO. You enter the number of the billing profile you wish to use here. If you enter an invalid number the billing profiles list will pop up and you can choose that one you want. It is important that you choose a billing profile that has the same labor rates as the estimate you are pulling in. If new lines are inserted in the future they will be at the rate of the billing profile, so make sure they match. (see setup Chap 4 for more info about billing profiles)

Damage profile - You enter the number of the damage profile you wish to use here. This field will not be available if you check the use damage limits to Select Damage Profile box. The program will automatically assign a damage profile. See setup chap 4.1 for more info on Damage profiles and limits.

Go to RO box - If checked you will be taken into the RO you are importing into directly after the conversion in finished.

Detailed supplement box - If checked Rome Management will record the lines that are being sent and what RO they are going into. This prevents lines from being duplicated when you bring supplements in from this estimate in the future. This function has been disabled in the new interface as it is no longer needed.

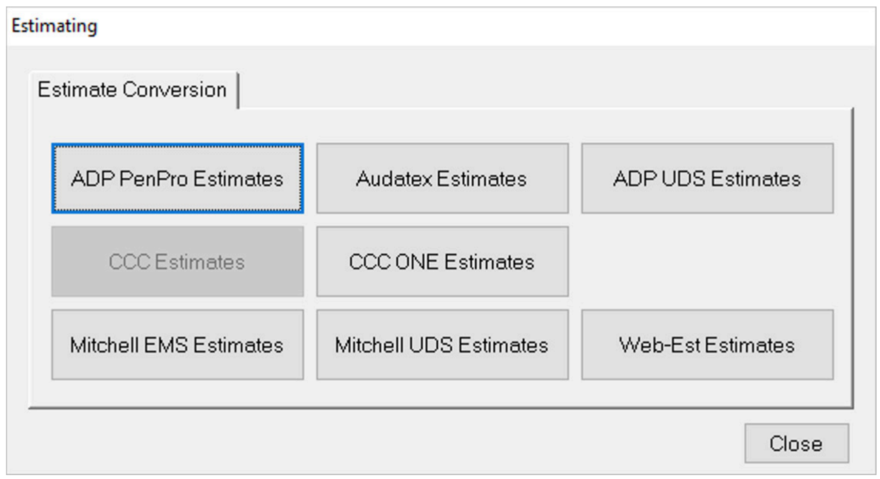
CREATING A REPAIR ORDER

There are three ways to create an RO in Rome Management:

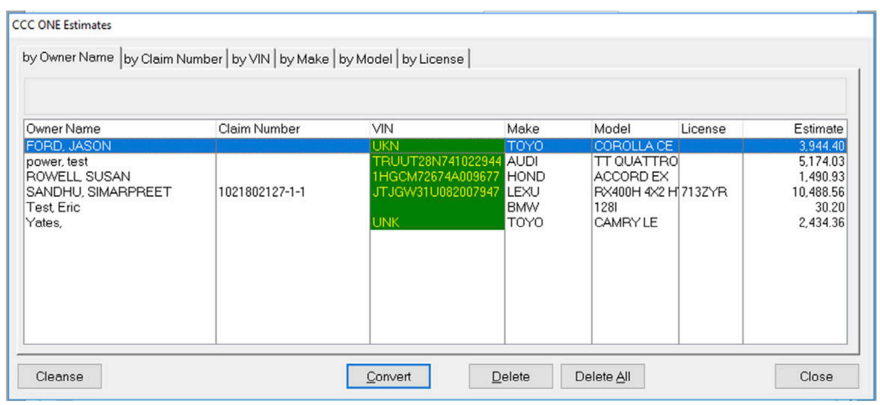
- Convert from an appointment (red calendar entry).
- Click the insert button on the Repair Order screen.
- By selecting a RO for Repeat customer and clicking the copy RO button at the bottom of the RO list screen.

IMPORTING INTO AN RO FROM AN ESTIMATING PROGRAM

1. Click the estimating button on the Rome management main screen. You should see the following window pop-up. This displays the different estimating systems and formats Rome Management can import from.



2. Click the estimating program you'll use to convert the estimate. This will bring up the estimate list screen which lists all of the estimates that have been exported from that particular program.

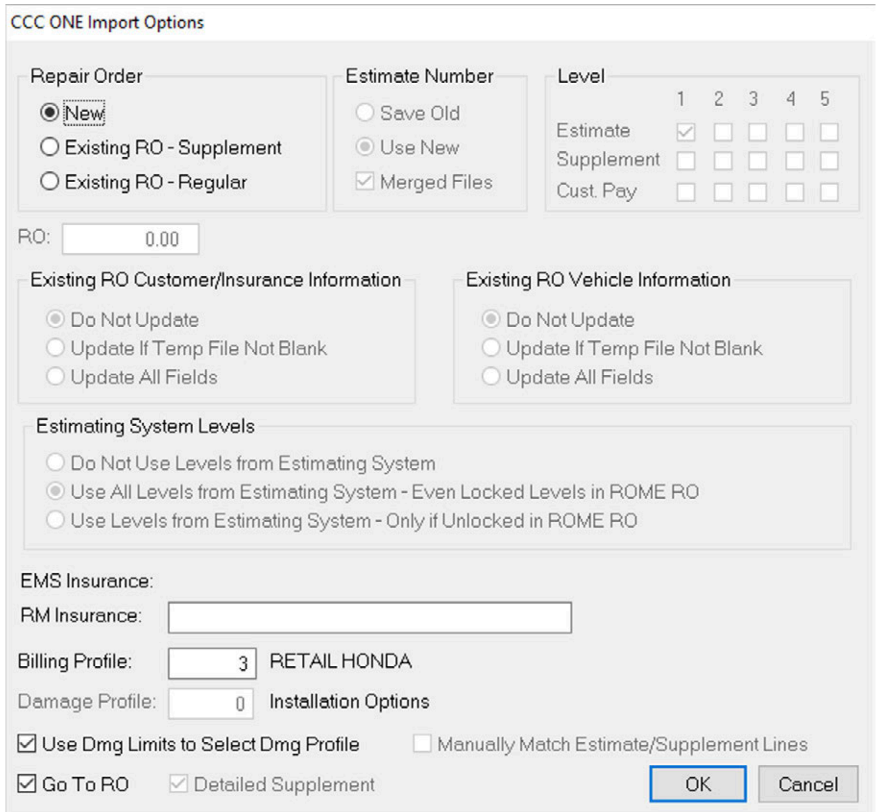


3. Choose to sort by Owner Name, Claim Number, VIN, Make, Model, or License by clicking the appropriate tab, you may then type the first few characters of your sort method to find the estimate you are looking for.

4. Click on the estimate to highlight it, then select the Convert button. You are now in the Import Options screen.

5. Since you are creating a new RO leave the button in New and the check in Estimate 1.

6. Enter a Billing Profile number in the Billing Profile field. It is important that you choose a billing profile that has the same labor rates as the estimate you are pulling in. If you insert new lines to this RO in the future they will be at the rate of the Billing Profile, so you want to make sure they match. See Setup Chapter 4 for more info about Billing Profiles.



7. If the Use Damage Limits to select Damage Profile box is checked you will not have enter a Damage Profile. If you want to select a Damage Profile uncheck this box and enter the profile's number. See Setup Guide section 4.2 for more information on Damage Profiles and Limiter.

8. The "Go to RO" check box is for going right into the RO after the conversion is done. If you are doing more then one estimate you want to leave this unchecked.

9. Press the OK button and the estimate will be converted into a Rome Management RO. You will see a progress bar and then it will disappear. This RO will be assigned the next number after the highest RO number in the RO list. If you checked the Go to RO box you will taken directly into the RO file. If not, you may select another estimate to convert.

CONVERTING AN ESTIMATING APPOINTMENT (RED CALENDAR ENTRY)

Open the calendar by selecting the Schedule button on the main screen. Go to the day of the appointment you are going to convert and double-click on the day. Highlight the appointment and press the Convert button. A new RO will be created at the end of your list and whatever customer information was in the appointment will be filled in. You may then import an estimate from your estimating program as explained in the “Importing into an existing RO” section below.

CREATING AN RO FROM THE RO LIST BOX

If you select the Insert button in the RO list you will create a new RO that will have the default billing and damage profiles and be the next number in the list. You will need to fill out whatever fields that management setup as required, when you do so you will be able to hit OK and save the RO. You may then import an estimate from your estimating program as explained in the “Importing into an existing RO” section below.

Tow in check box - Checking the Tow In check box will disable the required fields except for the VIN. This is for when you get a tow-in and you don’t have any info about the customer, but you still want it to be in Rome Management to track that you have the vehicle on your lot. You check this box and enter the VIN and it will allow you to create the RO. If you enter info in any other field the required fields will be turned back on.

CREATING A RO WITH THE COPY RO BUTTON

If you have a returning customer and their vehicle and contact info has not change since the last time they visited you can use the Copy RO button to make a new RO that has the same customer info as their previous RO. You must first find the previous customer RO in the list box. You can use the search function explained in the beginning of this chapter to help you find it quickly. Once you have the RO highlighted press the Copy RO button and a new RO will be opened. You should verify that the information in the customer screen is correct and fill-in any missing or required information. Then press OK and the RO will be created. You may then import an estimate from your estimating program as explained in the “Importing into an existing RO” section below.

IMPORTING INTO AN EXISTING RO

If you need to import an original estimate into an existing RO you use the same procedure as before with a few changes.

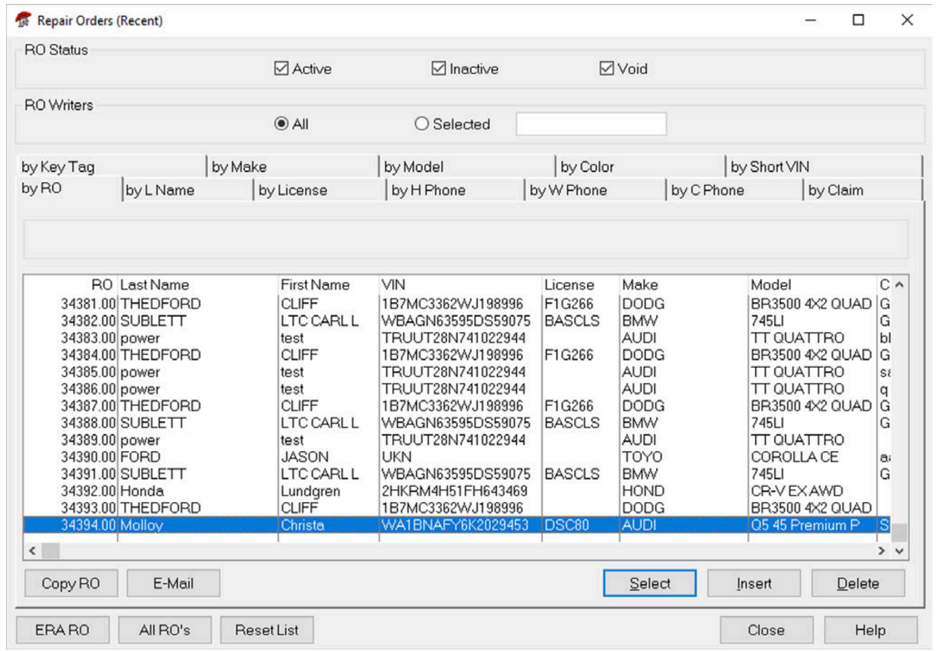
1. Press the Estimating button to open the Estimating and select the estimating program you use.
2. Find the Estimate you need, highlight it and then press convert.
3. In the Import Options screen, you want to make sure you select New- Existing RO.
4. When you select that the RO number field will become available. Fill in the RO number the estimate will go to. If you don't know the number you can type in a bogus number and hit Tab and the RO list will pop-up so you can select the RO you need.
5. The other fields in the screen should be left as they are. Rome Management has been designed to create an RO based on the information contained in the EMS extract files.
6. Check the Go to RO box if you want to go right into the RO after the estimate in imported in.
7. Click OK and the estimate will be converted and added to the existing RO.

NOTE: The billing and damage profile field will be grayed out because the RO already has those and they don't need to be selected

WORKING WITH THE REPAIR ORDER

OPENING AN RO

1. Click the Repair Order icon on the main screen to bring up the RO list box
2. Highlight the RO you want by clicking on its line.
3. Click the Select button to open, you can also double-click on the line and it will open.

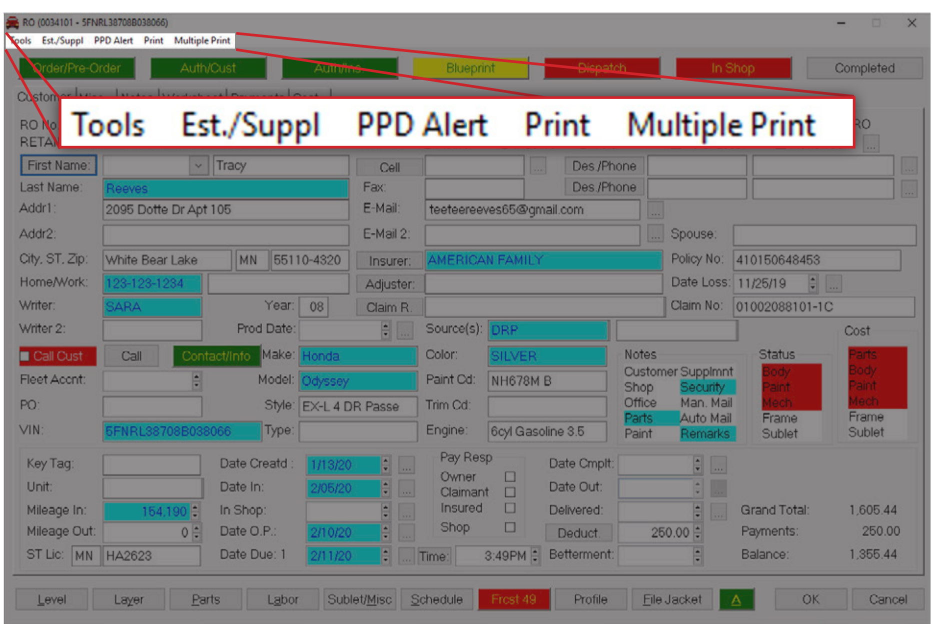


The next section goes over the screens you will be using working with the RO.

Customer Tab

PULL DOWN MENUS

The Repair Order Screen has five pull down menus: Tools, Supplements, Two-Way Estimating, and Print. By placing the mouse arrow on one of them and clicking the button, pull down menus will be displayed.



TOOLS

Calendar - this will bring up the Calendar appointment for this RO.

Schedule - Bring up the Schedule for this RO the same as the button below.

Red Alert Over-Ride - This option will remove all ROs from the Red Alert screen. If your shop has not been keeping up with the Production schedule the Red Alert screen will be full of ROs that are probably on schedule. Use this feature to “wipe the slate clean” so after you start keeping the production schedule up to date you will only see the ROs that are truly behind schedule.

Phone Book - This will open the vendor/phone list

Quick Message - This allows you to send a message to another user in Complete Shop and have it popup on their machine. Event manager must be running for the message to be sent and/or delivered.

File Jacket - This bring up the Electric File Jacket for this RO like the button below.
Override Profile Settings -this bring up the profile for this RO so you may edit the rates or tax. It is the same as hitting the Profile button below.

Automatic E-mail - This will allow you to manually send out the automatic e-mails that have been generated by the system.

Change Profile - This is where you can change the profile on the RO.

Change Damage Profile - This will change the Damage Profile on the RO.

Change Process Status - This allow you to change the process status of the RO.

Change RO Number - This will allow you to change the RO number of this job. You may only change it to a number that is not being used by another RO.

Change Forecast Due Date - This will let you change when a certain task will be finished and recalculate the Date Due for the RO.

RO Date Due History - Show the history of Date Due changed and the reason they were done.

Delete RO lines - This will allow you to delete any lines in the RO that do not have cost associated to them.

Change Levels - Allows you to change the level of selected transactions.

Lock Levels - This will let you lock a level so that no one can make changes to it.

Salutation List - Allows you add or edit the list of salutation titles in your system.

Users in RO - This will show you what users are currently accessing this RO.

Check Levels and RO Totals - Checks the level and RO totals for any problems.

SUPPLEMENTS/ TWO WAY ESTIMATING

From this menu, you'll be able to export a Part Price Change back into replace in CCC one. Here you'll find the interfaces to import the supplement levels of your estimates. This can only be used when you have imported the original estimate from your estimating product. Supplements should only be brought in through this menu not through the Estimating interface.

Change CSW lines to match estimate - This was used to change the CSW line numbers to match the estimate line number so the worksheet and other screens would be in the same order as the estimate. This has been made obsolete by the fact that Rome Management now includes the estimate number in the lines and sorts by those numbers by default.

Change internal estimate file reference - This feature is used to be able to pull a supplement into an existing RO from a different Estimate than what was used to create the original RO. This is helpful in situations where the original estimate was accidentally deleted or was written by a different adjuster or insurance.

EMS Import Log - This is a tool used by tech support to display information from every time an import was done.

PRINT

The documents you will need to print during the course of a repair are found here. All can be customized to fit your needs. They are:

Authorization RO - The customer signs this authorizing you to work on the vehicle

Detailed Invoice - This is the invoice the customer receives when the job is done.

Office RO - This is a invoice that displays the cost and profit. It is for internal use and is not intended to be seen by the customer.

Supplement RO - This is an invoice that displays the supplement totals so it is easier to see which lines have supplements and how much the supplements are.

Summary Invoice - This is a one line summary invoice that totals the parts, body, paint and mech.

Shop RO - Is an invoice that you give to the shop to show what is being done, what parts are received, and who is assigned to what lines.

Sublet Worksheet - An invoice that shows what lines have supplements and what the amount of the supplements are.

Sublet Labels - Prints a label that has RO number, customer last-Name, Make and model.

Parts reports

Parts Worksheet - Lists the parts, their prices, cost and status

Purchase Order - Prints out one of the purchase orders for this RO

Credit Memo - Prints out one of the credit memos for this RO

Labels - Prints out parts labels for labeling parts when they are received

Vendor Part Reconciliation - Shows the Est list, vendor list, and cost by Vendor

Parts Not Used - Displays Parts that have been removed from the job

Parts Not Returned - Displays Parts that have been removed or replaced and need to be returned.

Tech Dispatching List - Prints out a sheet for the tech to sign when they take receipt of a part from the parts department.

Labor Worksheet - Displays the labor lines and shows who is assigned and if they have been flagged.

Cycle Time - Print the cycle time for this RO, when each labor task was started and completed.

Blueprint - Prints the blueprint for the repair, when each task will start how long it should take.

Thank You Letter - Prints out a quick Thank you letter for the customer in this RO.

Backorder Reminder - Prints out a reminder for you about parts on back order.

Custom Message - Allows you to print out one of the custom messages you have created.

Notes - Prints out whatever types of notes you select for this RO.

Schedule Jacket Label - Prints out a barcode label to stick on the vehicle so you can scan the car with the Tri-coder or PDA.

Windshield Ticket - Prints out a full page sheet to put in the vehicle windshield that identifies which RO the vehicle belongs to.

Windshield Grid Label - Prints out a larger label that includes the 15 tasks.

Prior Damage Worksheet - Prints a top down image of a car that you can use to indicate prior damage on the vehicle.

Prior Damage checklist - Prints a sheet that has a smaller image of the car and some checklist items.

Quality Assurance Checklist - Prints out a checklist for Quality Assurance.

RO Labels - Prints a label to stick on the schedule jacket to identify which RO it belongs to.

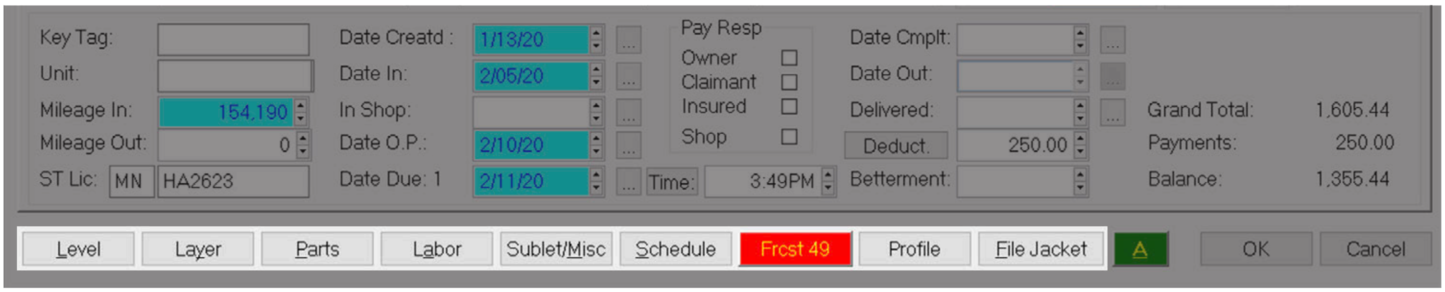
Merge Customer Letter - This prints out a custom letter using the customer information in this RO.

RO (EMS)Estimate Import Log - Prints a log of the estimate lines that have been brought in to this ticket. Only works for EMS format, will not work if you are using the U UDS format.

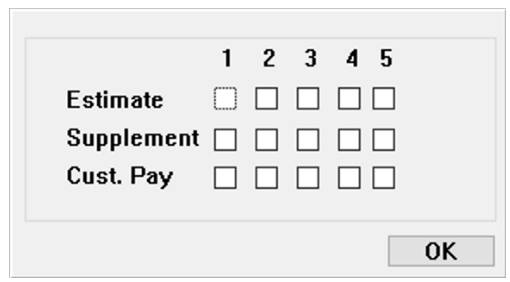
MULTIPLE PRINT - This is used to print several documents at once.

IN SHOP - This marks the car as being “in production”. This RO will now show up on all production schedules and appear on the Date Due in Green on the Calendar.

TOTAL LOSS - The towing check box is used when you get a towing drop off and you don’t have much information about the customer or vehicle. This check box disables the required fields on the customer screen so you only have to enter the VIN of the vehicle to create the RO so you can track that you have it on your lot.



LEVEL BUTTON - This is for displaying only certain levels so you can see totals for just the original estimate the supplement. Click the levels you wish to have displayed on the RO and click OK. The RO should only display the lines that have the level that was clicked. The other levels will be hidden and not count in any of the totals displayed in the RO. When levels are on, you will see “amounts” highlighted in yellow along the bottom of the page. This is to let you know that you are not seeing all of the lines so users don’t think there are lines missing. To turn levels off, go back into this box and uncheck all boxes. The ticket will return to the normal display.



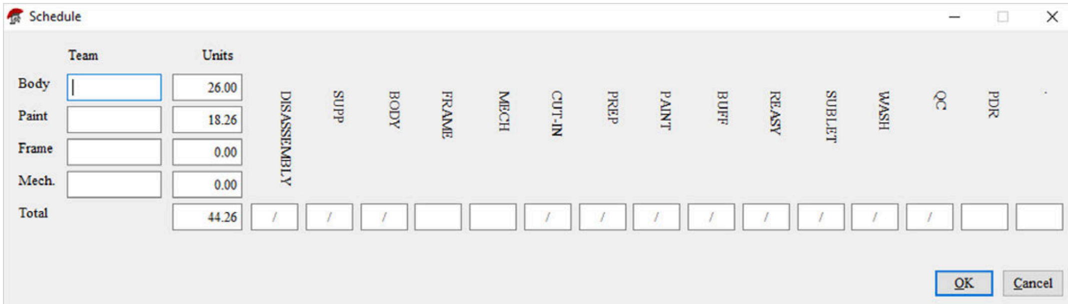
Layer button - This is for filtering the RO to display each layer (or estimate import). Good for troubleshooting if the estimate gets out of balance we can see which import caused the problem.

Parts button - This will bring up the Parts Management screen for this RO. The parts on this job can be ordered, received, returned and backordered from this screen. *(See Section 5 for more info on this screen.)*

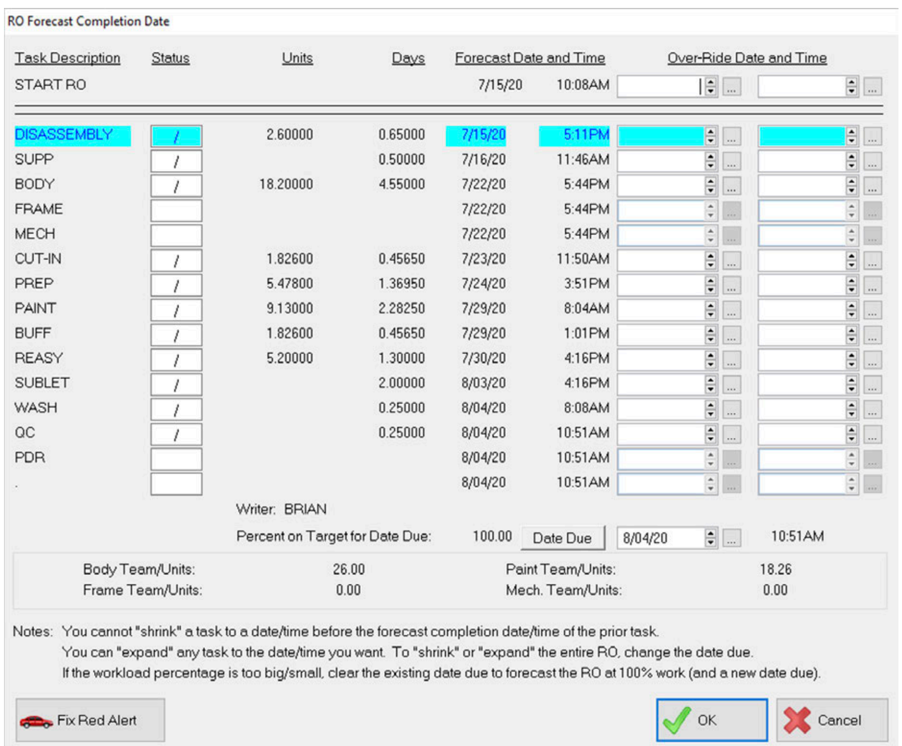
Labor button - This will bring up the Labor Management screen for this RO. You can assign, flag and pay technicians on the labor in this RO. *(See Section 6 for more info on this screen.)*

Sublet/Misc - Plays the Sublet and Miscellaneous transactions for this RO. You can assign vendors and cost out the transactions from this screen. *(See Section 6 for more info about this screen.)*

Schedule Button - This will bring up the production schedule for just this RO.



This will show all tasks for this RO and what tech is assigned to what kind of labor. If more than one tech is assigned to a labor type it will display the one with the most hours. The hours that are displayed depend on how you setup Rome Management. These can be either the f total units on the job, the non-flagged units (units as-signed but not flagged) or the uncommitted units (units that have been flagged but not committed).



Forecast button - Displays what date and time each task should be completed by. It allows you to override and will recalculate the date due based on the new date. You can also change the date due and it will shrink or expand the dates the fit within the new date due.

Profile Button - Brings up the current billing profile for this RO. You may adjust the tax rate and the rates for the different accounts from this screen. Pressing the Reset line items will go through every line of the RO and change it to match the rate you entered so make sure you have the rates right or the RO will not balance with the estimate.

File Jacket - This takes you to the Electronic File Jacket interface where you can scan the paperwork for this job into the RO so it is readily available to be viewed. *(See Section 8 for more info on File Jacket.)*

RO CUSTOMER TAB

Below are the fields from the Customer Information Main Screen of the Repair Order. When you click “tab” you will move forwards through the fields. When you click “shift-tab” you will move backwards through the fields.

RO number - Automatically assigned sequentially by Rome Management.
Below the RO number the current Billing Profile, Damage Profile, and Process Status are displayed.
The format is Billing Profile/Damage Profile/Process Status.
The next lines are for the customer’s address & home phone info.

Writer 1 & 2 - These fields are for assigning a writer or estimator to this job. Many of the reports in Rome Management are sorted by writer. If you type the name incorrectly it will pop the employee list and you can choose which writer you want.

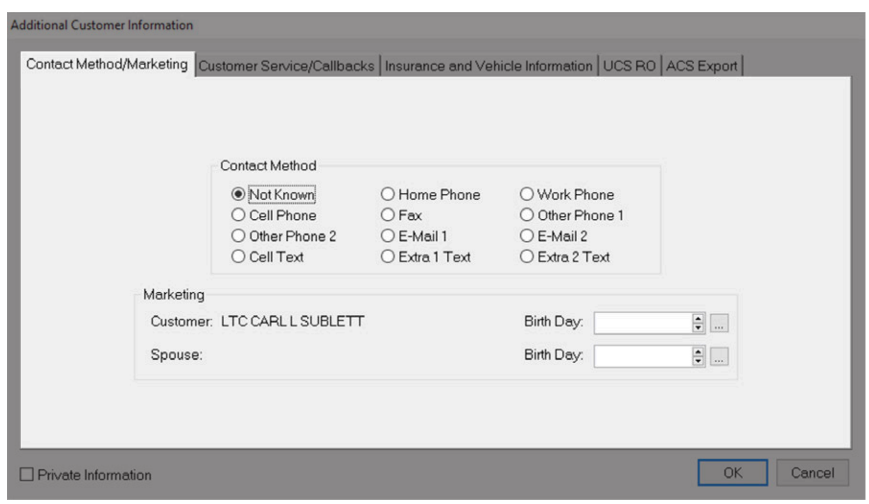
Call Cust Box - Check this box if the customer wants a call back from the estimator. This will show up in blue in the Customer Callback screen.

This box has four tabs

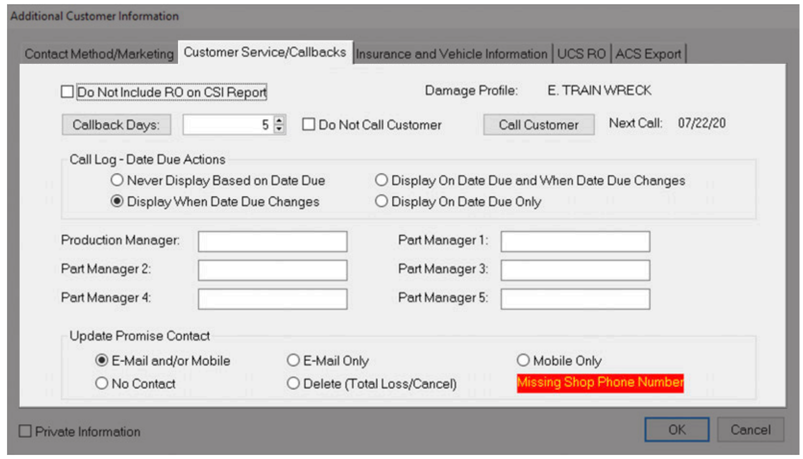
- Contact Method/Marketing
- Customer Service/Callbacks
- Insurance and Vehicle Information
- USC RO
- ACS Export

CONTACT METHOD/ MARKETING TAB FIELDS:

Contact Method
Choose how the customer would prefer RO be contacted. if you select email or text, Rome will send the customer an automatic email or text if those have been setup in your system.



CUSTOMER SERVICE/ CALLBACKS INFORMATION TAB:



Do Not Include RO on CS/ Report
If you check this box this RO will not be on the Rome Management CSI Report found in the Marketing section.

Damage Profile
The current Damage Profile is displayed and the number of callback days associated with that profile. You may change that number if you wish and it will only affect this RO.

Do not Call Customer
If you check this box this RO will not show up on the Callback screen to be called back, even if the Date Due changes. Often used for fleet or internal vehicles.

Call Customer
Can be used to record that you have called the customer. Enter Notes on this screen and the new RO will be removed from the callback screen until the new call date.

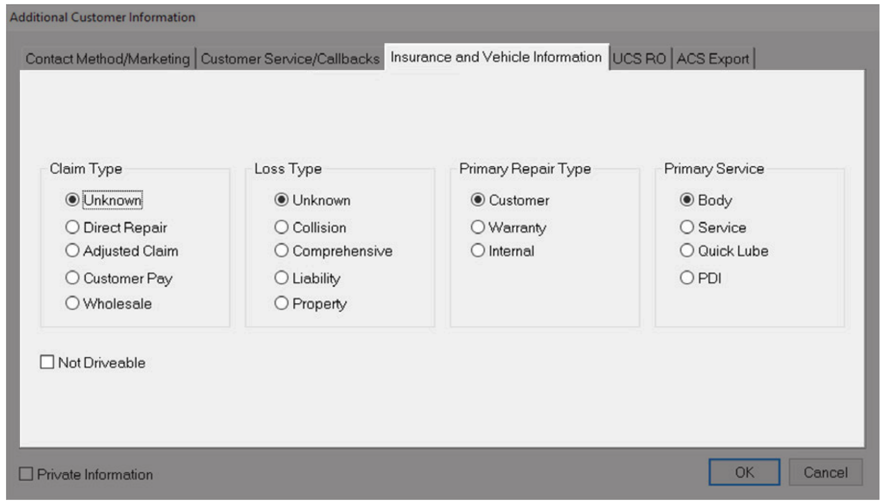
Note: The program counts today as one of the day, so calculate that into the number.

Example: If you want the customer called every other day you would select the number 3. Today being Day 1, tomorrow is day 2 and the day of the call is day 3.

Choose a Call log - Date Due Action

- **Never Display Based on Date Due** - The RO will not be displayed in the Callback screen for date Due changes.
- **Display When Date Due Changes** - Every time the Date Due is changed the RO will appear in the Callback list so the customer can be notified of the Date Due change.
- **Display on Date Due and When date Due Changed** - Same as above but the RO will also be displayed on the actual Date Due so you can call the customer and let them know the car is ready.
- **Display on Date Due Only** - Will only display on RO Callback list on the Date Due, not every time the Date Due is changed.
- **Parts and Production Manager fields** - This is where you enter the employees that are your parts manager and Production manager so you can send them automatic e-mail or text updates.

INSURANCE AND VEHICLE INFORMATION TAB:



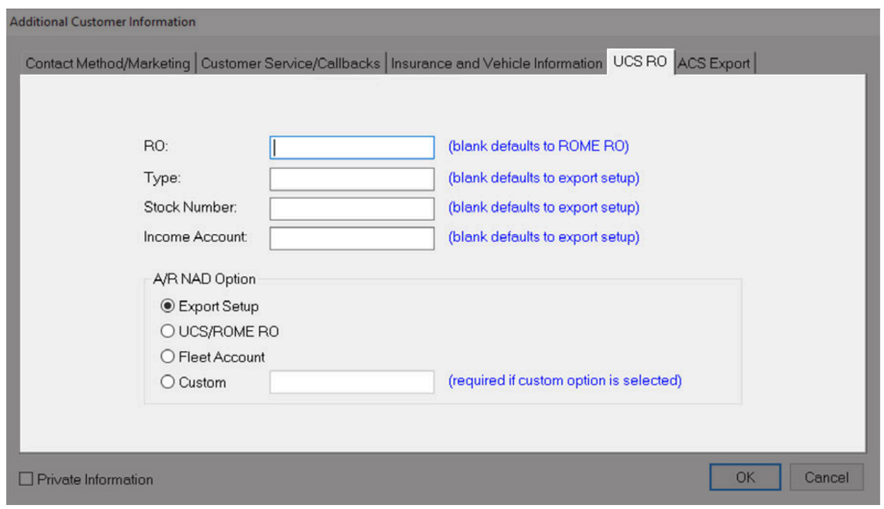
This is just for your information it does not affect any reports

Mark claim type
- Unknown
- Direct Repair
- Adjusted Claim
- Customer Pay
- Wholesale

Mark loss type
- Unknown
- Collision
- Comprehensive
- Liability
- Property

Check the Not Drivable box if applicable.

USC RO TAB:



Customers using the UCS DMS interface can set options for this particular RO here.

Private Information - At the bottom of the screen is a check box to indicate Private Information, if you check this box this information will not show on internal RO reports that you would give to techs. This is so you can comply with local privacy laws if applicable.

Fleet Account - If the car is from one of your Fleet account customers put the account number here. This RO will then be included in the monthly statement for that Fleet account. If you enter an incorrect number it will pop up the Fleet account list so you can select the correct account from the list. See Setup Section 9 for more info on setting up Fleet accounts.

PO number - If this RO is for a Fleet account you can put the customers PO number here and it will print out on the monthly statement.

VIN (use all 17 characters) - Make sure the VIN is correct if you are using a Dealer Management System (ADP, R & R, UDS) as this number is used to identify the vehicle in the DMS.

Status - This is for selecting the status of the RO

Active - Is for open jobs that are being worked on.

Inactive - Locks out most users but the managers. When a job is dated out it will be made inactive. This prevents normal users from making changes to the RO after it is closed.

Void - When this is selected ALL of the revenue will be removed from the job but any cost will remain. The revenue cannot be put back on without going into each individual line and changing the status to revenue and cost and re-entering the revenue.

Cell - Enter the customer's cell phone here. If you are going to send updates via text to the customer's phone press the cell button and select the customer's wireless provider.

Fax - Enter the customer's fax here.

Email - You can enter two e-mail addresses if the customer would like to get e-mail updates from you.

Insurer - Here is where you can enter the insurance company responsible for payment. It is important you choose the correct insurance company so that you can accurately run sales reports by insurance company. If you make a mistake it will pop the insurance company list so you can choose the correct one. If you press the Insurer button after you have entered a name in the field it will let you select Offices, Adjusters and Claim Reps you have linked to that insurance company. See Setup Section 11 for more information on setting up Insurance companies.

Adjuster - This is where you enter the adjuster's name. You will not be able to enter anything into this field until you have selected an insurance company in the field above. Then you will be able to press the Adjuster button to pop a list of adjusters associated with the insurance company you selected. If you do not see the adjuster in the list you may click Insert to add it.

Claim Rep. - This is where you enter the claim reps name. You will not be able to enter anything into this field until you have selected an insurance company in the field above. Then you will be able to press Claim R. button to pop a list of claim reps associated with the insurance company you selected. If you do not see the claim rep in the list you may click Insert to add it.

Total loss Check Box - Check this box if the RO becomes a total loss. You will be able to exclude Total Losses from certain reports.

Reviewed check box - The person responsible for checking the RO before it gets delivered checks this box and it makes an automatic note with the time and the user that checked the box.

Extra Desr./Phone - There are two fields here you can put any alternate phone numbers in.

Spouse - You can put the Spouse's name in here for reference.

Policy number - The insurance policy number of the customer is helpful to have when you call the insurance company.

Date loss - This is the date the accident/damage occurred.

Year - Year of the vehicle. (Last 2 digits)

Prod Date - This is the production date of the vehicle. It is for info purpose only and doesn't affect any reports.

Make - The Make of the vehicle. If you make a mistake it will pop the vehicle make list and you may select the make. If the make is not in the list you may click insert to add it.

Model - The Model of the vehicle. If you make a mistake it will pop the vehicle model list and you may select the model. If the model is not in the list you may click insert to add it.

Style - This is for the body style. There is not a list associated with this field.

Type - This is for body type. There is not a list associated with this field.

Source 1 & 2 - This field is for tracking the source of Business for this RO. Possible sources are Walk-in, Insurance Co., referrals, etc. If you make a mistake it will pop the Source list so you can pick one and if you want to add a new source then you can hit the insert key and create a new source.

Color - The color of the vehicle.

Paint Cd - Paint code. If you know what the code for the paint on this vehicle it will make the painter's job much easier.

Trim Cd - Trim code. If you know what the code number for the trim on this vehicle it will help make sure the right moldings etc. are ordered.

Engine - This field is where you can put an engine type.

Key Tag - If you have key tags you can put the number here. If you are using a DMS when you link to the DMS RO it will put the DMS RO number in this field.

Unit number - This is where you can put a unit number that the customer may give you. (If they have a fleet of the same vehicle they often use a unit number to identify them.)

Mileage In - This is for recording the mileage of the vehicle as soon as you receive it.

Mileage Out - This is for recording the mileage of the vehicle when you deliver it to the customer.

ST Lic. - This is where you would put the license info for the vehicle. Two letter code for the state and then input the alphanumeric license number.

Payment Responsibility - Check which parties are responsible for payment, so you will know who to contact to collect payment.

Deductible - This is where you put the customers deductible. It is for your info only it does not affect the balance of the ticket. It will appear in the customer header on invoices.

Betterment - This is where you put any betterment. It is for your info only it does not affect the balance of the ticket. It will appear in the customer header on invoices.

IMPORTANT FIELDS

The customer information screen contains much information about the RO and it is critical that the information in certain fields on this screen are accurate to ensure accuracy in your management reports. Obviously you want to ensure that the customer's name and phone number are correct but there are other important fields as well.

The writer field is important because many body shops pay their writers based on how much business they generate. This field will give them credit for this RO. You need to make sure that your estimators are entered into Rome Management as techs so that they will show up on the list and can be entered into this field. See Setup on how to do this.

Insurance company, make, model and source needs to be correct so that management can run reports and searches sorted by these fields. Be careful not to create two entries for one insurance company or make/model i.e. Nationwide & Nationwide Ins. If both have been selected on ROs you won't get all the ROs when you sort by one or the other. You don't want the techs searching the lot for a Lexus when they should be looking for a Lincoln. See Setup about setting up insurance companies and descriptions lists VIN number needs to be accurate if you are using a Dealer Management System (DMS) interface because it matches the RO to the vehicle record in the DMS through this field.

Date fields It is very important to have the correct dates entered in the date fields on the customer screen because most of the reports and many of the tools and features of Rome Management rely on these dates to function.

Date Created - This is when the RO was created. This field is automatically set to the current date when the RO is created. It will confirm when the RO was created in the system and should not be changed.

Date In - This is the date that the car will arrive (future) or when it actually did arrive (past). A job that has a Date In and no Date Out is considered a Work in Progress. The Date In, in conjunction with the Staging and In Shop check boxes, will dictate where and what color the RO will appear on the calendar. If the RO is not checked In Shop there will be a yellow entry on the calendar signifying that the car will be dropped off on that date.

Date In Shop - This is the date that the Repair order went into production. This is the date that you actually started work on the vehicle.

Date O.P - This is the date you originally promised the customer the repair would be finished. This date should not be changed so you know what was promised if there is a dispute.

Date Due - This is the date that the repair will be finished and ready to be delivered to the customer. If the car is marked In Shop there will be a green entry on the calendar signifying that the car will be finished and ready to be delivered on that date.

Prod Date is the Production Date of the vehicle and is for informational purpose only.

Date Complete - This is the date the work was completed and the car was ready to be delivered. It is used to calculate the cycle time of the repair.

Date Out - This is the date when the RO was made a sale and is closed. It is the point at which the RO goes from being a work in progress to a sale. Repair orders with a Date Out will not appear on the calendar or on the production schedule. The revenue information will now be available to be exported to whatever accounting system you are using. The Date Out should only be put in if you are confident nothing else will be added to this repair.

Date Delivered: This is the date that you actually delivered the vehicle to the customer. If the customer did not come to pickup the vehicle right away you will be able to tell from the difference between the Date Completed and the Date Delivered.

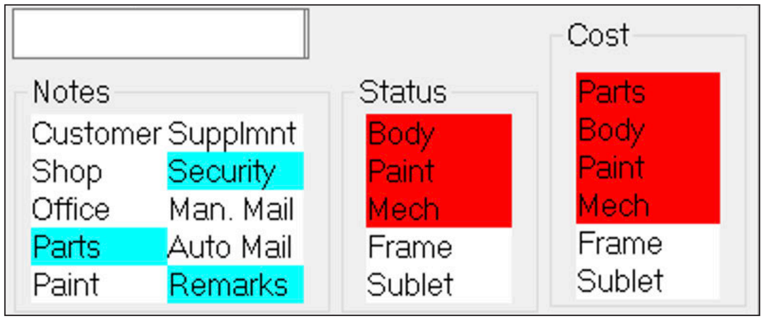
A small example of the importance of the dates:

An insurance company is complaining that your cycle time is too great. Their number is coming from the day the customer drops off the car to when they pick it up. You have had difficulties with getting prompt approvals from this insurance companies adjusters resulting in work not starting on the car for a few days after it arrives. You can run a cycle time report in Rome Management from the Date In to the Delivery Date to get a report that will match theirs. You can then run a cycle time report from the Date In Shop to the Date Completed to see what the actual time it took you to repair the vehicle. The difference in the two reports is the time you wasted waiting on approval or waiting for the customer to pickup the car.

INDICATOR BARS

There are three indicator bars in the customer information screen:
Notes, Status, and Cost

These bars will change color according to the progress of the RO. For example, when the estimate is first introduced, all bars will be red, indicating operations to be done. As work is started and progresses, the status column will begin to turn yellow, indicating work in progress. When green, the work is completed.

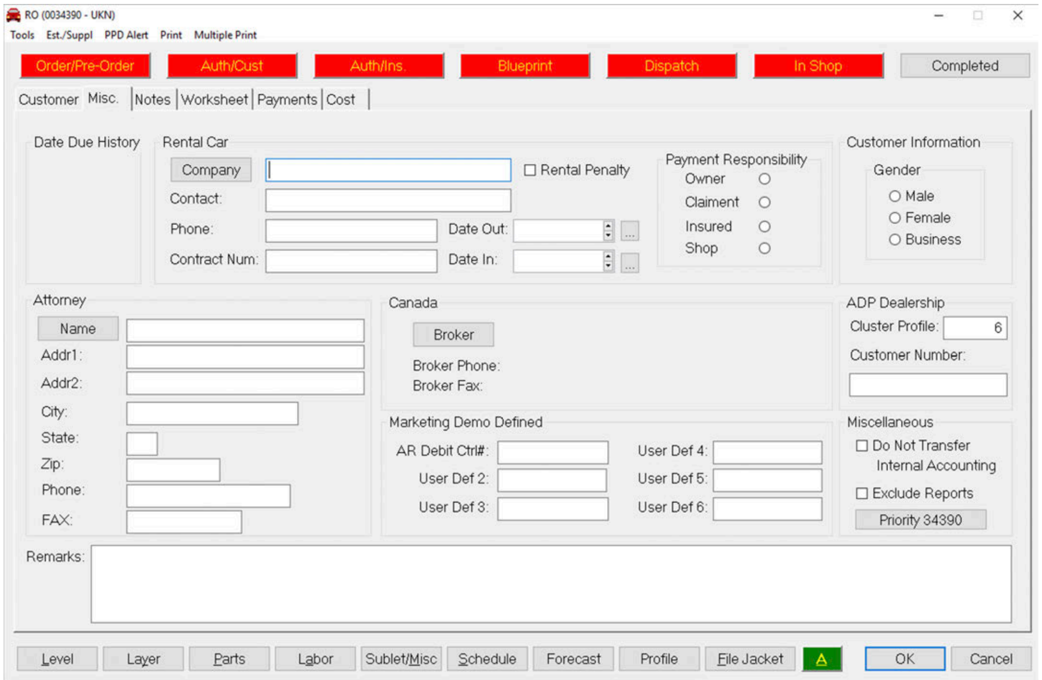


Notes - Indicated by the color blue, This tells what form of note (example: office note, shop note, etc.) has been used on the RO.

Status - Reflects the production status of the vehicle on the shop floor. This is tied directly into the production scheduling product that can be viewed from the production schedule or from the schedule button for that specific vehicle, which is located on the bottom left center of the screen. See Sec?? of this manual for further info on how to setup status progress.

Cost - This defines the percentage of job costing that the job has undergone for parts, body, paint, mech., frame, labor, and sublet. The cost column will change color as cost is incurred. Example: When parts are costed (received), parts will turn yellow and a percentage number will appear, which represents the percentage of completion. When parts are fully received, it will turn green and indicate 100%. When a job is finally delivered, all columns should be green. As techs are flagged, the labor categories will change color as well. The number is a percentage of the cost dollars that have been received, so if you receive 5 of 10 parts and those 5 parts account for only 25% of the total cost of the parts. The number will be 25% not 50%. See Setup guide Section 4 on how to setup which accounts codes go to which cost status bar.

Misc. Tab



Date Due History - This box will contain all of the different Due Dates that have been set for this RO. If the Date due was originally 1/1/06 then changed to 1/6/06 then changed to 1/3/06 it will display as:

1/1/06

1/6/06

1/3/06

Rental Car - This section is for information about the rental car the customer is using while their car is in the shop. The Date Out is when the customer picked up the car and the Date In is when they brought the car back. The Rental Car report uses these dates to track which rental cars have not been returned.

Customer Information - choose the gender of the customer. You can sort the CSI report by gender if you wish.

Attorney - Contact information for the customer's attorney.

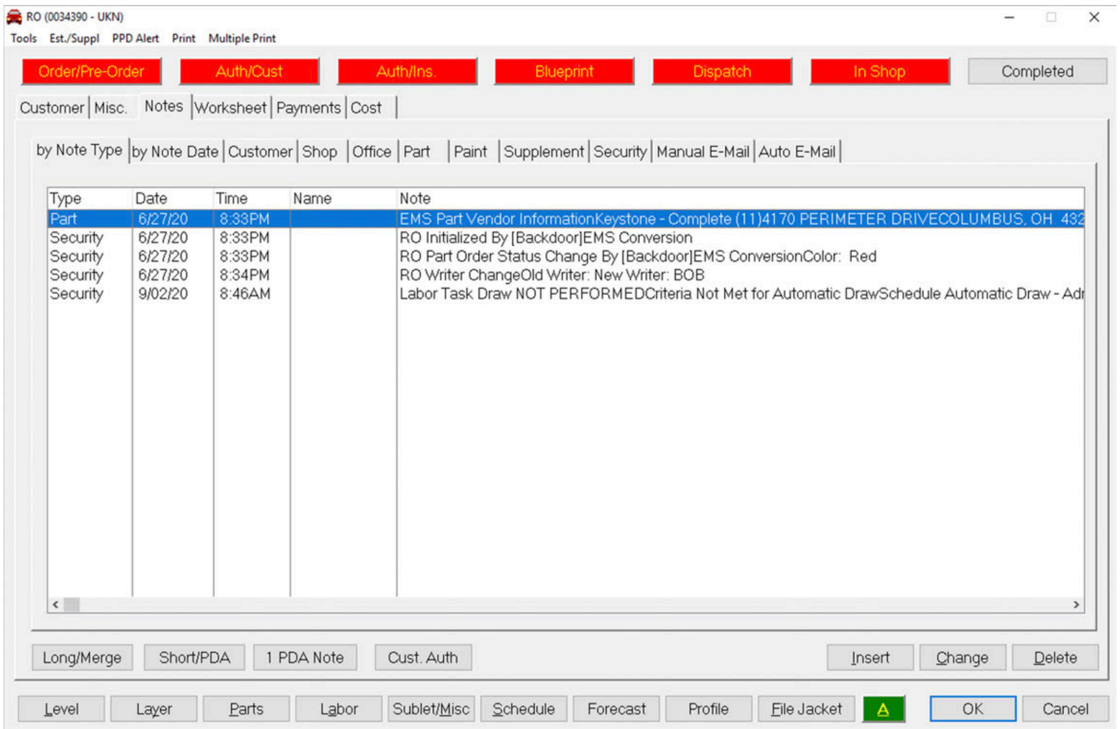
Canada - This is for the Broker information if you are doing business in Canada.

ADP Dealership - This is for customer number information if you are using the ADP GAI dealership interface. This is not a required field.

User-Defined fields - There are six fields that you can change the title to suit what kind of information you want to put in there. It is for informational purposes only and these fields will not appear on any reports.

Remarks - This is a field where you can put remarks for this RO. These remarks can be selected to be printed on most reports by checking the Remarks box.

Notes Tab



This tab lists the notes that have been generated for this RO. It can be sorted by the type of note or by the date the note was created.

Long/Merge Button - This will allow you to save a custom message you created beforehand as a note in the RO.

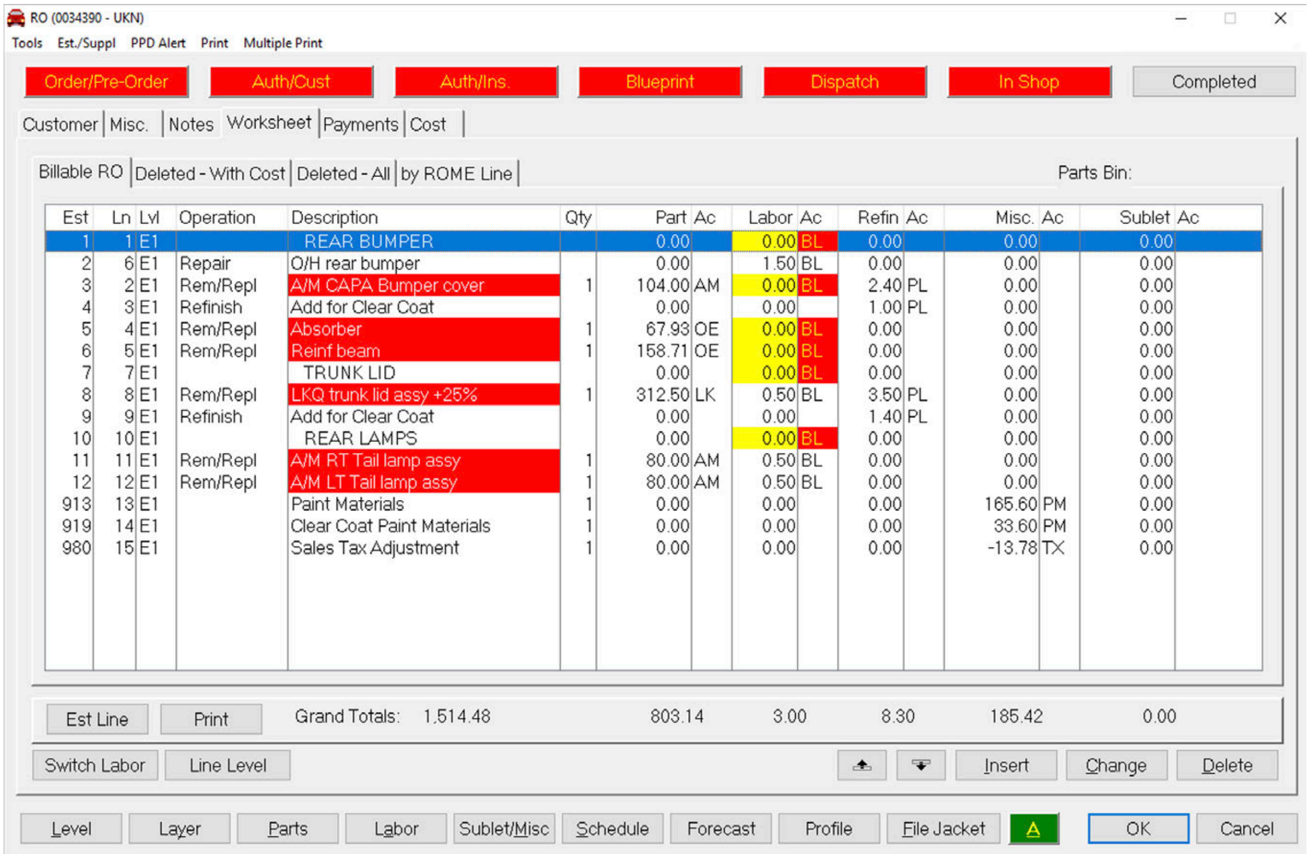
Short/PDA button - This will allow you to select one or more pre-defined notes. Select the notes you want and hit Make RO Notes button to add them.

1 PDA Note button - Will allow you to select just one of the Pre-defined notes.

Insert button - Will allow you to create a new note.

Change button - Allows you to edit the currently highlighted note.

Worksheet Tab



The Worksheet Tab displays the lines that come in from the estimate and any that you create on this RO. There are four tabs at the top of the worksheet display:

Billable RO - This tab display the lines that are being billed to the customer and that will display on the final invoice.

Deleted - **With Cost** - This displays lines that have been deleted due to supplements but still have cost on them.

Deleted - All this displays all of the deleted lines regardless of cost.

By Rome line - This will sort the worksheet by the Rome management lines as opposed to the estimate lines.

Est - The line number from the estimating system. This number may differ from the Rome Management line number. By default, Rome management sorts the worksheet by this number.

Ln - The number of the line in Rome management.

Lvl - The level of the line. e1-5 is for estimates, s1-5 is for supplements and c1-5 is for customer pays

Operation - The labor operation for the line if applicable. (**Example**: designate repair, r&I, replace, ect.)

Description - The description of the line from the estimating system

Qty - The quantity of the part described on this line. this column will be blank for labor/sublet lines.

Part - If the line includes a part, the total price of the part will be displayed here. *(See setup section for more info on account codes.)*

Labor - This column will show the number of units of body, frame or mechanical labor for this line. lines that have amounts in this column will show up in th labor management screen, and you can assign tech to work on them

Refinish - This column will show the number of units of paint labor for this lines. Lines that have amounts in this column will show up in the labor management screen, and you can assign tech to work on them.

Misc - This column will show the price of any miscellaneous transactions for this line. Lines having an amount in this column will show p in the sublet misc management screen as miscellaneous transaction.

Sublet - This column will show the price of the Sublet transaction for this line. Lines having an amount in this column will show up in the Sublet/Misc screen as a Sublet transaction and can be have cost applied and be associated with a vendor.

Ac columns - 2 letter account codes that will be applied to the part, labor, or transaction.

There are five buttons of operation at the bottom of this screen:

Est line - This allows you to change the estimate line number for the selected line.
Print -this will print the worksheet display out.

Switch labor - Allows you to switch labor hours between the labor and refinish columns.

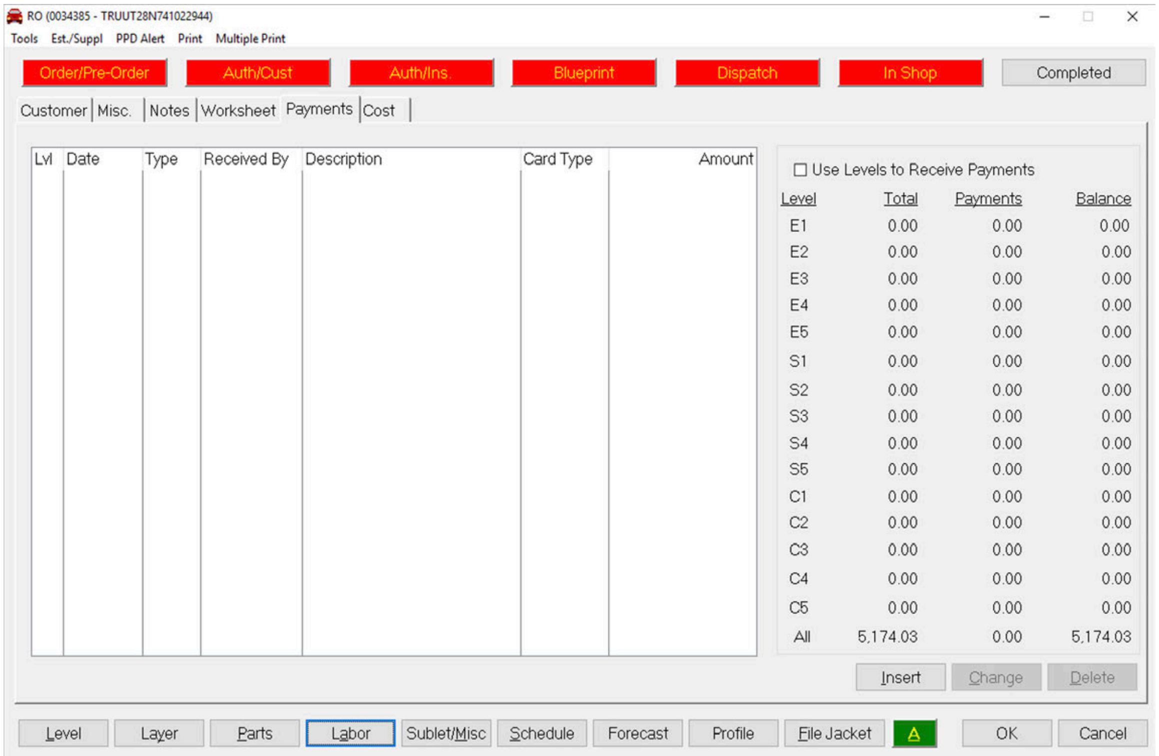
Line level - Allows you to change the level of the line.

Up and down arrows will change the Rome line number. The est line column will not be affected.

Insert - Will insert a new line into the worksheet. The new line will default to the next highest number.

Change - Will allow you to edit the currently selected line.

Payments tab



This screen is where you enter payments re received for the RO. When the payments are entered they will reduce the outstanding balance.

Use levels to Receive Payments - When you check this box you will turn levels on for the RO. When you go to enter the payments it will prompt you to select the level you want this payment to go against. When this box is unchecked allows printing in levels also payments will go against the entire balance.

Insert - Insert a payment into this RO

Change - Edit the highlighted payment

Delete - Delete the selected payment

Cost Tab

Category	Account	Factor	Est Cost	Cost	Est Profit	%	Profit	%	Supplement	Price
BODY LABOR HONDA	4600A	0.400	240.24		360.36	60%	600.60	100%		600.60
PAINT LABOR HONDA	4600B	0.400	191.52		287.28	60%	478.80	100%		478.80
FRAME LABOR HONDA	4600C	0.400				0%		0%		
MECH LABOR HONDA	4600D	0.400				0%		0%		
OEM PARTS	4710A	0.750	2,315.63		771.87	25%	3,087.50	100%		3,087.50
LKQ PARTS	4710B	0.800				0%		0%		
AM PARTS	4710C	0.600	277.06		184.70	40%	461.76	100%		461.76
USED PARTS	4710D	0.600				0%		0%		
SUBLET LABOR	4660A	0.800				0%		0%		
PAINT MATERIAL	4670A	0.550	172.48	172.48	141.12	45%	141.12	45%		313.60
HAZ WASTE	4670B	1.000				0%		0%		
SUBLET TOWING	4660B	1.000				0%		0%		
STORAGE	4670C	0.000				0%		0%		
PDR LABOR HONDA	4600E	0.400				0%		0%		
PAINT MATERIAL	4670A	0.550				0%		0%		
Subtotal			3,196.93	172.48				3%		4,942.26
Taxable: SALES TAX										3,862.86
SALES TAX		0.07375								231.77
Grand Total					1,745.33	35%	4,769.78	97%		5,174.03

The cost tab displays the revenue, cost and profit of the RO broken out by account code. It also displays the estimated cost & profit based on parameters management setup. This screen is the easiest way to see if your Rome RO balances with the estimate you used for this job.

IMPORTING A SUPPLEMENT

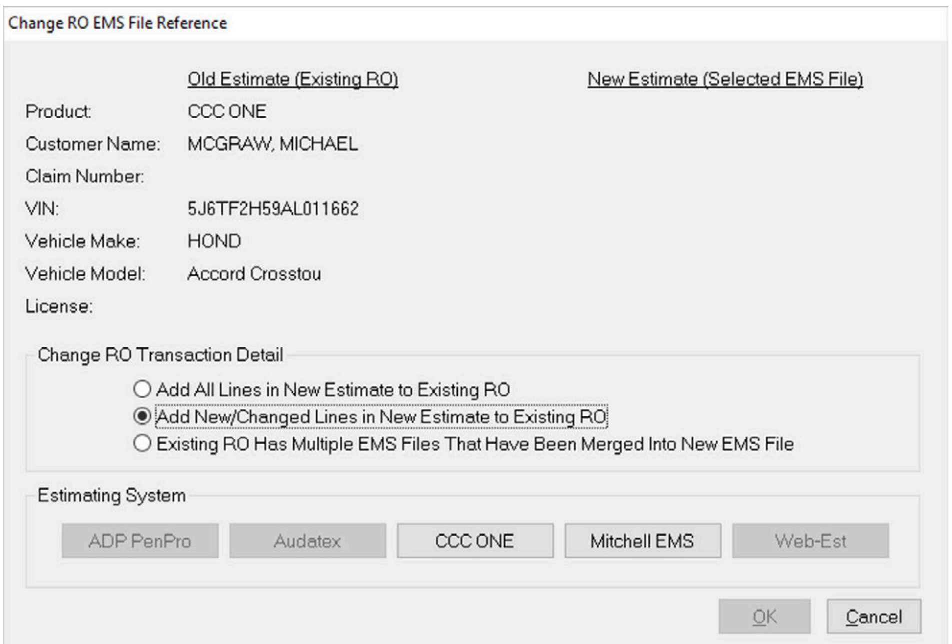
After you have created the supplement in the original estimate and exported from your estimating system, follow these steps to bring the supplement into the repair order.

- Open up the repair order. DO NOT bring supplements in through the estimating button. Only Bring them in through the RO itself otherwise you will bring in another duplicate estimate.
- Click on the est/suppl menu at the top left of the repair order, then click the corresponding estimating system.
- The estimate should appear in the list. check the dollar total of that estimate, it should match the total in your estimating system.
- Click convert to bring up the estimate interface option box. leave all the settings alone you do not have to change anything in this screen.
- Click OK and the supplement will be converted and added to the Rome Management RO. Immediately check to see that the RO balances, with the estimate total.

Note: Once the supplement has been imported once, Rome Management will not re-import those lines in the future. Deleting the supplement lines and re-importing will not work and you will be forced to hand enter the supplement lines or redo the ticket entirely.

CHANGING INTERNAL FILE REFERENCE

Rome Management links to the estimate by tracking the estimate ID number of the EMS file. Sometimes this number can change so when a supplement is sent over, the price does not get updated. If this has been the case, go to the est/button and select change internal estimate file reference. This will automatically look for any estimates that match the VIN number. Highlight estimate and press the select button. If no estimates match double check the VIN number in Rome to make sure it is correct. There are three options for how the new estimate will be treated when it goes into Rome



Add All lines in the new estimate to Existing RO - This will take all of the lines in the new estimate and add them to the existing ticket. So for instance, if you wrote one estimate as the original and you wrote a second estimate that just had additional supplement items, you could use this selection to bring the second estimate in as a supplement.

Warning: Rome highly advises before doing this process to contact customer support at 800-373-7663 to go over the situation. Depending on your DMS integration, you may not be advised to add Customer Pay lines to an Insurance Estimate.

Add New/Changed Lines in New Estimate to Existing RO - This will take the supplement changes from the new estimate and apply them to the ticket keeping the original estimate intact. This is the most common use of this function and the dot is in this choice by default. This depends on the estimates being written in the same order i.e the line number of the estimate should match except for the supplement lines. If not the original estimate lines may double up.

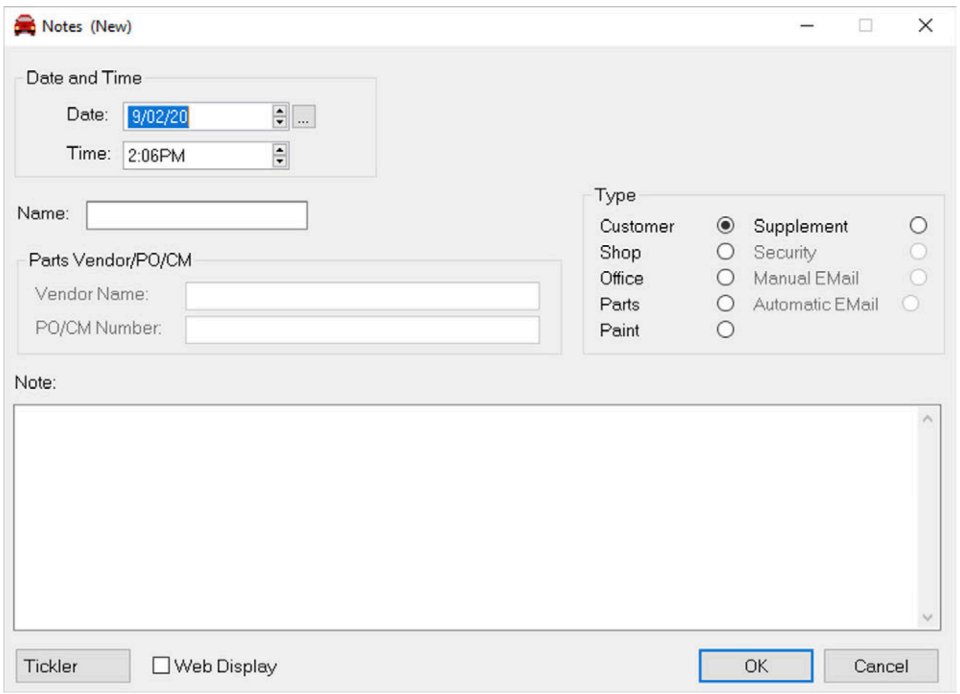
Existing has multiple EMS files that have been merged into EMS file - This is for when you have merged estimates and are now importing an additional estimate. It will try to interpret what's in the file and what lines are new or changed. It is not an exact process so results can be unpredictable.

NOTES

All notes are kept in the notes tab; you may sort them by note type or by note date by clicking on one of the tabs at the top of the list. Automatic notes are generated by the system when certain functions are performed in the system. This will create an audit trail to track when a function was performed and who performed it.

Adding a note
To add a note press the insert button on the notes screen.

- The new Note window will pop up.
- The date and time will default to the current date and time set on your computer.



- You then need to select the type of note you want to create. Most reports in Rome Management have options to allow you to select the type of notes you want to print out.

  Customer - These notes are intended to be seen by the customer. They would most likely appear on the final invoice.

  Shop - These notes are intended to be seen by the production staff, techs and paint crew. They will typical be added to route sheets and labor worksheets.

  Office - These notes are intended to be seen by the office management. They would be printed on internal sales reports and similar reports.

Parts - These notes are intended to be seen by the parts vendor and would be included in the purchase order or on a vendor payable report.

Paint - These notes contain information about the cost of the paint used on the car imported from the paint machine.

Supplement - These notes are intended to be seen by the insurance provider and are normally included on supplement invoices submitted for approval.

- Enter your name in the name field and then write the body of the note.

The tickler button is for setting a reminder to pop-up on YOUR screen at a specific time in the future.

- Enter the amount of minutes, hours and days you want the message to appear in the future and the display at the bottom Will change to reflect when the message will pop-up.
- Click OK to save the message or Cancel to quit without saving the note. Help button does not function at this time.

Note: The Event manager must be running in order for the message to pop-up

Editing a note
Highlight a note in the list and hit the Change button. You will be able to edit the different areas of the note. Some users may not have permissions to change the date, time or name fields. This is to protect from tampering with the notes to mislead and cover up mistakes.

Deleting a note
Highlight the note in the list and press Delete to remove a note. Not all users will have permission to delete a note.

Pre-defined Notes - If you have a note that you use over and over you can enter it as a pre-defined note and then select it from a list instead of typing it out every time. In the notes screen select the Pre-defined button and you can select from the Pre-defined notes your shop has created. If you need to create one press the insert button and add it.

WORKSHEET

Inserting a new line in the worksheet - Click the Insert button and a line will be created and default to the next available line number. You can then tab through the columns and add the details in the line. When you are finished entering the information you want tab to the end of the line and you will be prompted to save the changes to the line. Click OK and the new line will be added and any revenue you placed on this line will increase the Balance of the repair order. NOTE: Any labor you enter in this manner will be calculated at the rate of the current Billing profile so you may want to check the rates of that profile before you add the line. Instructions on how to change the billing profile are found later in this section.

Editing a worksheet line - Highlight the line you want to edit and hit the change button. Tab over to the col you want to edit and type in the changes you want to make. Tab to the end of the line and you will be prompt to save your changes. The only change you can not make is to reduce labor hours on a line that the tech has been flagged on. You will need to un-assign the tech, then change the hours then re-assign him to the line.

Deleting a worksheet line - Highlight the worksheet line and press delete. You will not be able to delete a line that has an ordered part, assigned labor, or a sublet/misc transaction that has had cost entered. You must first un-order the part, un-assign the labor or remove the cost in order to delete a line.

PAYMENTS

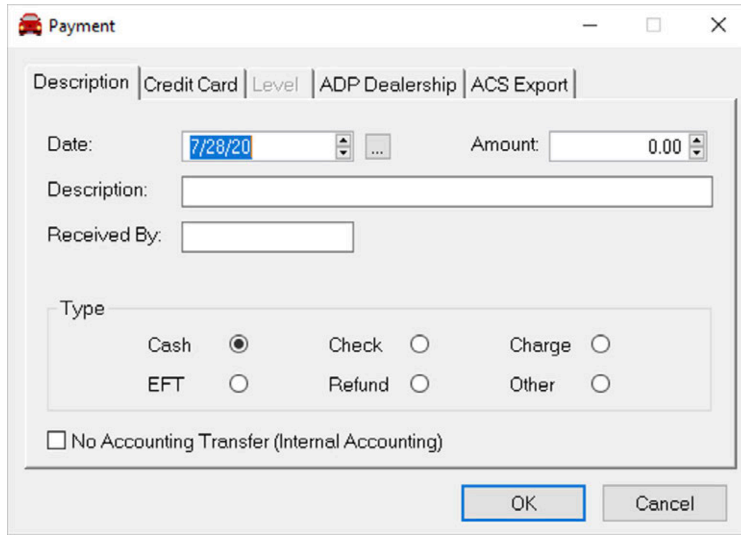
At the top of the Payments screen there is a check box labeled “Use levels to receive payments”

If you check this box it will turn levels on for the RO and then you will be able to apply payments to certain levels.

For instance, if the RO has a few customer pay lines and the customer gives you cash to pay for those items. When you go to insert the payment, if levels are on you will be prompted to select which level the payment is for. The payment will be applied to the customer pay lines and the insurance companies balance will not be affected. Clicking the box also turns on levels for many of the other reports in the RO particularly the RO Invoice reports.

Entering payments on the RO - Click the Insert button on the Payments

- The Payments window will pop up
- The date will default to today's date. You can change it if you received the check on an earlier day.
- Enter the amount and a description
- Enter your name or the person's name who received the check.
- Enter what type of payment it is.



- The "No Accounting Transfer" check box is for users that have Rome Internal Accounting. It will prevent this payment from being exported into Rome accounting. This will not work for the Quick Books interface.
- If it is a credit card click the Credit Card tab and enter the credit card information for your reference.

Note: This field is not encrypted or protected so make sure you're not going to violate any rules or laws by entering the number here.

- The ADP Dealership tab is used to override the account that payments normally get sent to. It is only to be used by customers who have the ADP interface and only if they want to send the payment to a different account than normal.
- Press OK to save the payment or Cancel to quit without saving.

Editing payments - Highlight the payment and click Change. The Payments window will open and you will be able to change the information on this screen.

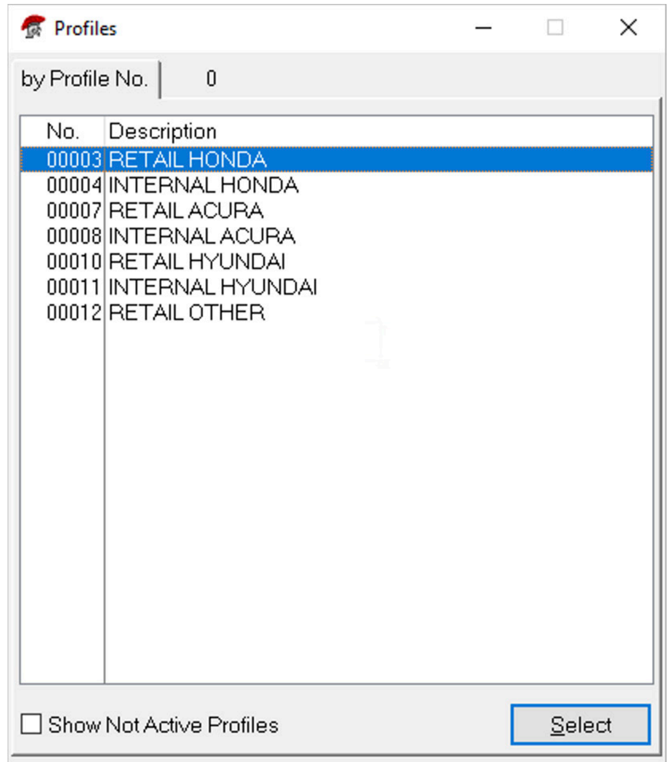
Deleting payments - Highlight the payment you want to remove and click the Delete button. The payment should be removed and the balance should change.

CHANGING THE BILLING PROFILE

The Billing profile is imported from the estimating system so it should only need to be changed in the event you wish to use a different set of account codes .ie. Customer Pay, Internal. Click the Tools menu at the top of the RO and select Change Profile.

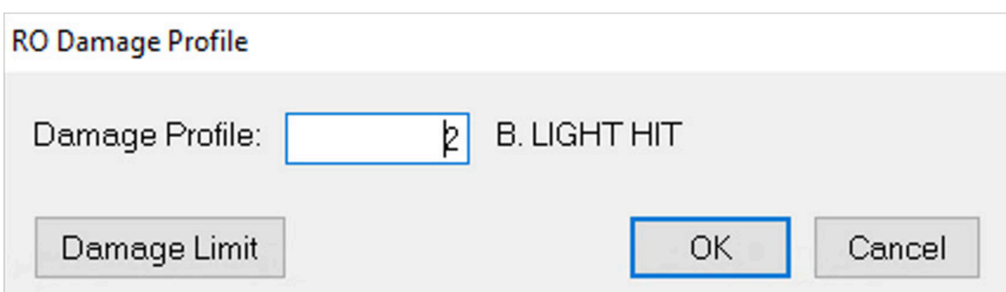
- Click the Tools menu at the top of the RO and select Change Profile
- The Billing profile list will pop up.
- Highlight the profile you wish to use and click select.
- Both the new and old profiles will be listed, so you can compare the account codes in each.
- Press OK and the profile for the job will be changes.

Note: The rates on the lines will not be changed. This just changes the profile so that hand-inserted lines will have the proper rate.



CHANGING DAMAGE PROFILE

The damage profile determines the frequency of customer callbacks and also the parameters used to calculate the forecast Due Date. To change the Damage profile in an RO click on the Tools menu and go down to Change Damage Profile.

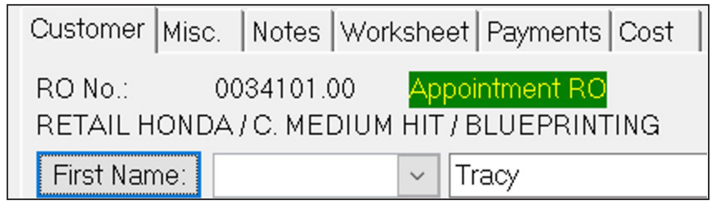


- Select the number of the damage profile you wish to use on this repair. Entering an incorrect number will pop up the damage profile list and you can select the one you need.
- Pressing the Damage Limit button will automatically select the damage profile based on the parameters set in the Damage limiter. *(See Setup Section 4.2 for more information about Damage limits and profiles.)*

CHANGING THE PROCESS STATUS

The process status is a quick way to let everyone know where the vehicle is at in the repair process. The current status is displayed after the billing profile and damage profile on the line just below the RO number.

To change the status of an RO, click on the Tools menu and select Change Process status. Select the number of the status you want and hit OK. If you put in an incorrect number the process status list will pop up and you can choose the status you need.



CHANGE AN RO NUMBER

If you want to change an RO number to a number that currently does not have a Repair Order, you can. However we do not recommend you use a number that is higher than the last RO in your list unless it is the very next number. The reason why is that, when you create an RO the system assigns the next highest number. So if you currently have RO numbers from 1 to 100 and you change an RO to number 200, the next RO that is created will be 201 and 101- 199 will not exist.

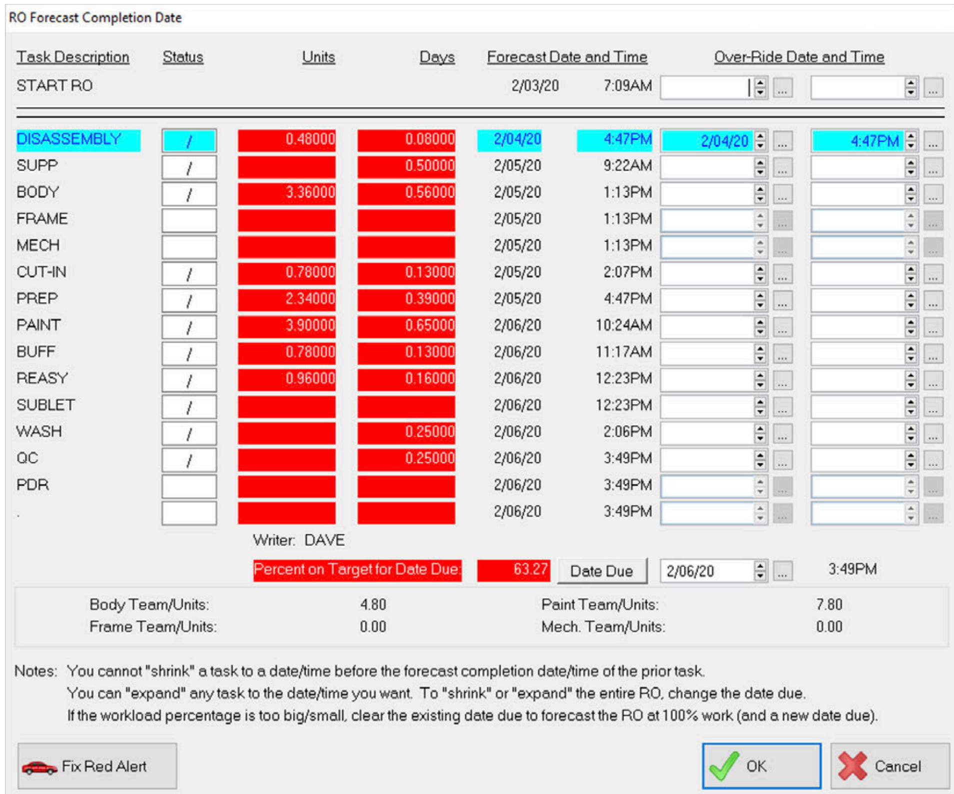
1. Open the RO.
2. Open the Tools menu.
3. Click on Change RO Number.
4. Enter the new number.
5. Click OK.
6. You will be returned to the RO list box and you should see the RO listed under the new number.

Note: If you change the RO number to one that has information on it you will get an error message. And it will not let you complete the action.

CHANGING THE FORECAST DUE DATE

Rome Management will automatically calculate a Due Date for the RO based on the number of hours on the repair and how many hours per day the management believes the shop can produce. In some repairs you may need to override this based on special circumstances. The Date Due Forecast override will allow you to do this.

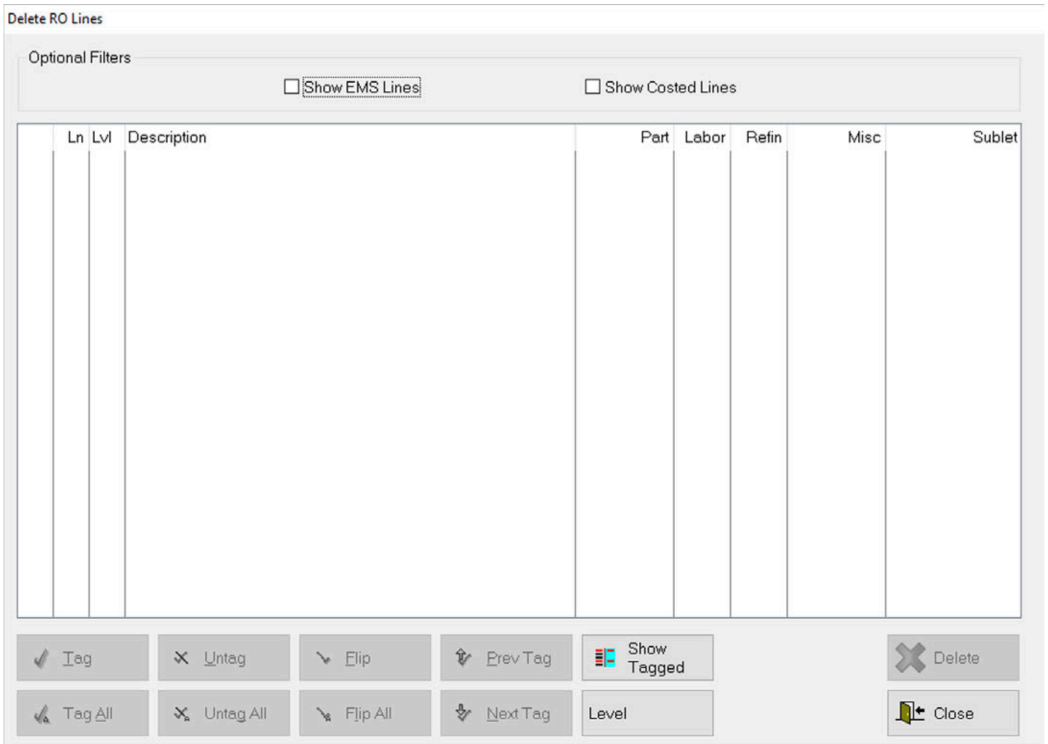
In the RO click the Tools menu and select Change Forecast Due Date and the RO Forecast Completion Date window will pop up. Whichever task will not be completed on the day it is scheduled enter the day it will be completed in the override field. The button at the end of the field will bring up a calendar so you can pick the day. Rome Management will display the new forecast based on the date you changed.



MULTI-LINE DELETE

If you need to delete several or all the lines in an RO there is a utility to help you do so. You will need to have permissions to delete RO lines and you need to be careful which lines you are deleting. If you delete supplement lines it is not possible to bring those in again and you will be hand entering them.

1. Go to the Supplement menu and select the last item EMS Import Log.
2. Highlight the EMS logs and press delete. You will not be able to use the Multi-line delete until these logs are deleted.
3. Go into the RO and click on the Tools menu
4. Select Delete RO lines to bring up the Delete RO lines screen.
5. Click the boxes at the front of the lines to select that line to be deleted.
6. Click the Delete button to remove the selected lines from the RO.



The buttons at the bottom are there to help you select multiple lines.

Tag - This will tag the highlighted line. It will do nothing if the line is already tagged.

Tag All - This will tag all lines on the job.

Un-tag - This will un-tag the line if it is tagged. It will do nothing if it is not tagged.

Un-tag All -This will un-tag all the lines in the job.

Flip - This will change a tagged line to un-tagged, and change a un-tagged line to tagged.

Flip All - This will perform the above flip operation(above) on all of the lines.

Prev Tag - This will move the highlight to the next tagged line above the currently highlighted line.

Next Tag - This will move the highlight to the next tagged line below the currently highlighted line.

Show Tagged - This will toggle the screen through the following displays:

Show tagged - when you hit the button it will only display the lines that have been tagged. The button will also be renamed to Show Un-tagged. Hit Show Un-tagged and it will only display the lines that have NOT been tagged. The button will be renamed to the Show All Lines. Hit the Show All lines and the display will go back to the displaying all of the lines, and the button will once again say Show Tagged.

Level - This button will bring up the level box so you can choose which level you want to display. Only lines for that level will be displayed in the list. Be careful to uncheck the levels after you are done so you are displaying all the lines when you go back to the RO.

CHANGING THE LEVEL ON MULTIPLE LINES

If you come into a situation where you need to change the level on several lines, use the RO change level utility.

1. In the RO go to tools and then select Change Level
2. The Change level screen which is almost identical to the RO Delete lines above will pop up
3. Select the lines you want to change the level of in the same manner as you did for the Delete RO lines above. The level button will probably come in very handy here.
4. When you have all the lines you want selected hit the Change Level Button.
5. The Level selection box will come up and you pick the Level you want to change to and hit OK.

LOCKING LEVELS

If you are done modifying a level and don't want its revenue totals to change you can lock it so that no one can change the totals.

1. In the RO go to the Tools menu and select Lock Levels
2. Select the level that you want to lock. And click OK.
3. Only users that have permissions to change locked levels will be able to edit lines in that level.

Note: This prevents users from changing revenue AND cost so assigning tech and ordering & receiving parts will not be possible in a locked level.

SEEING USERS ALSO IN THIS RO

If another user is in the same RO as you Rome Management will display a yellow warning in the RO letting you know there is someone else in the RO. Depending on how you setup Rome Management this may prevent you from editing this RO. There is a tool to let you identify the user so you can ask hem to get out.

1. In the RO go to the Tools menu
2. Click Users in RO and you will see the users that are currently accessing this RO.

ROME

2421 Mountain Road
Pasadena, MD 21122

800-373-ROME
www.rometech.com

Published by Rome Acquisitions LLC © 2022