

R O M E

**2022 WORKBOOK**

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**CANONS OF SUCCESS**

**REYNOLDS AND  
REYNOLDS**

**2022**



# **REYNOLDS AND REYNOLDS**

## Linking a Rome RO to an ERA RO

Highlight the RO you want to link in the RO list and press the ERA RO button in the lower left corner. On the next window that opens press the ERA RO button.

The screenshot shows the 'ERA RO' window. At the top left, a yellow box says 'Debug Mode On 2'. The window is divided into two main sections: 'Customer/Car Information' on the left and 'ERA Invoice Information' on the right. The 'Customer/Car Information' section contains fields for RO: 0100095.00, Date Out, CRISTI BUSH, 48 ALABASTER WAY, JOHNSTOWN CO 80534-9469, Home - 303-905-2673, Work - 303-905-2673, VIN: 3CZRU6H78GM711804, 16 HOND, and HR-V EX-L AWD w. The 'ERA Invoice Information' section contains buttons for 'Store/Branch Number', 'Customer Number', 'Vehicle Information', 'Repair Order', and 'Update RO', along with radio buttons for 'No Cost', 'Send Cost', and 'Close RO'. At the bottom are buttons for 'Update Customer Info', 'Update ROME Vehicle Info', and 'Close'.

Customer/Car Information		ERA Invoice Information	
RO: 0100095.00	Date Out:	Store/Branch Number	Store: 1 Branch: 1
CRISTI BUSH		Customer Number	54806
48 ALABASTER WAY		Vehicle Information	54806
JOHNSTOWN CO 80534-9469		Repair Order	887.383
Home - 303-905-2673	Work - 303-905-2673	Update RO	
VIN: 3CZRU6H78GM711804		<input checked="" type="radio"/> No Cost	<input type="radio"/> Send Cost <input type="radio"/> Close RO
16 HOND	HR-V EX-L AWD w		

Press the Customer Number button to link to an ERA customer.

The screenshot shows the 'ERA Customer Search' window. It has a search bar at the top with tabs for 'by Last Name', 'by Customer', 'by Home Phone', and 'by Work Phone'. Below the search bar is a table with columns: Cust Num, Last Name, First Name, Address, Home Phone, and Work Phone. The first row of data shows Cust Num: 54806, Last Name: BUSH, First Name: CHRISTI, Address: 48 ALABASTER WAY, Home Phone: 303-905-2673, and Work Phone: (empty). At the bottom are buttons for 'Search', 'Select', 'Insert', and 'Change'. The status bar at the very bottom shows 'RO Info', 'Print', 'ERA Customer: 54806', and 'Close'.

Cust Num	Last Name	First Name	Address	Home Phone	Work Phone
54806	BUSH	CHRISTI	48 ALABASTER WAY	303-905-2673	

**NOTE:** Rome Management refers to Reynolds and Reynolds as "ERA".

The next window should display the closest match ERA could find to the customer information in Rome. If it matches the name and address in Rome you can select it by pressing the Select button. If the listing does not match Rome or there is nothing listed press the Search button and ERA will display any listing that are similar. If the listings still don't match or there are no listing you could press the Insert to add a customer into ERA.

**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. Then hit close to exit the window. The customer number you selected should be listed next to the button.

Then hit the Vehicle Information button to link to a vehicle in ERA. If it finds the VIN in ERA it will display the same number next to the button as the customer number above it. Sometimes it will display an error message that the vehicle is linked to another customer in ERA. This usually happens if a previous owner is still linked to the vehicle. The only way around this error is to go into ERA and link the vehicle to the proper customer. If you don't know how to do this you need to ask someone in the accounting department to do it or call the Reynolds TAC and get them to show you how.

After you have it linked to a customer and vehicle you will hit the Repair Order button to create a RO in ERA. It will automatically use the next sequential number in ERA and display it next to the button. Hit Close to close out of this screen. You will see the VIN of this RO highlighted in Yellow in the RO list. This means this RO has been linked to ERA.

### Sending a closed RO to ERA

When the RO is finished and you are ready to send it to ERA, highlight the RO and press the ERA RO button to get back to the ERA RO screen. You're going to put the Dot in the Send Cost option then hit the Update RO screen.

ERA RO

Debug Mode On 2

Customer/Car Information

RO: 0100095.00      Date Out:  
CRISTI BUSH  
48 ALABASTER WAY  
JOHNSTOWN CO 80534-9469  
Home - 303-905-2673 Work - 303-905-2673  
  
VIN: 3CZRU6H78GM711804  
16    HOND                    HR-V EX-L AWD w

ERA Invoice Information

Store/Branch Number	Store: 1	Branch: 1
Customer Number	54806	
Vehicle Information	54806	
Repair Order	887,383	
Update RO		
<input checked="" type="radio"/> No Cost <input type="radio"/> Send Cost <input type="radio"/> Close RO		

Update Customer Info

Update ROME Vehicle Info

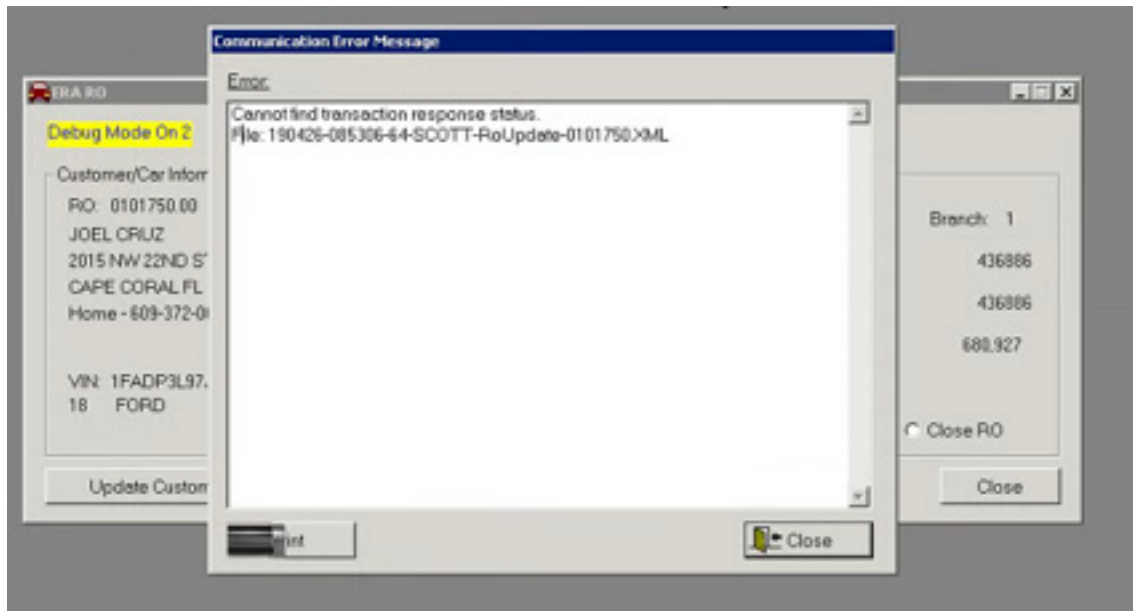
Close

This should send the Sale and Cost over to ERA but the ERA RO will still be in Review mode. This is so we can verify that everything went over correctly before we sever the link between Rome and ERA. Go into ERA and into screen 3651 or if you are using ERA Ignite then go to where you edit and accept payment to the RO. There should be entries in GoG and usually in Misc and Tax. There should not be entries in Parts, Sublet or Labor the Rome interface does not utilize those areas. If you go into the GoG screen by pressing 7 you will see entries for each of the accounts codes sale and cost. They should match the totals on the Rome Cost screen. If the totals match, close out of the ERA RO, go back to the ERA RO screen in Rome place the dot in Close RO and hit the Update RO button. This will take the Reynolds ERA RO out of Body Shop review mode and into Close Out mode. It may still say Body Shop Review mode at the top of the ERA RO when you open it. Don't worry it takes time for that to update. As long as you see the I=Invoice option at the bottom you will be able to close it and send it to the General Ledger.

## **Closing to the General Ledger in ERA**

Once Rome has released the ERA RO from "body shop review mode", the ERA RO must still be completed (invoice, accept payment, closed, invoiced) as usual including a shop "tech 99" on any jobs, mileage out and any other closure warnings listed. Once you complete the Invoicing process the totals for this RO will be on the GL.

## Error Messages Tied to Reynolds



This means it is not talking to Reynolds. Before calling Reynolds support, try backing out of the ERA interface window and try the ERA RO button again. If the error still occurs you will need to contact technical support at Reynolds.

**ISSUE:** The RO in ERA is showing that it is still in review mode.

**RESPONSE:** If at the bottom you can see (I=INVOICE) it can be closed. It may take a bit longer to update the top of the ticket with the review mode.

**ISSUE:** The record is locked by another user.

**RESPONSE:** You may have this customer information open in your Reynolds screen. Exit the customer information and try again in Rome.

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