

R O M E



ROME MANAGEMENT
USER GUIDE

WELCOME

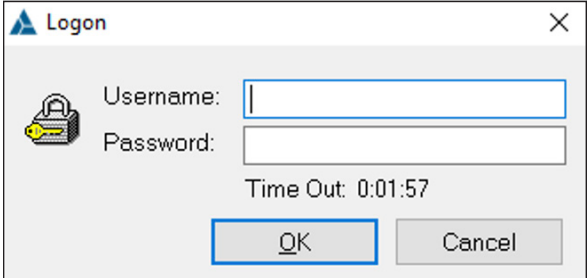
2022

WELCOME TO ROME MANAGEMENT

Our user interface is designed to respond to the intuitive logic of the collision repair shop. But there will always be times when a review or reminder is called for. So keep this manual close at hand and when you're uncertain how to proceed, follow the step-by-step directions in this book.

OPEN ROME MANAGEMENT AND LOG IN

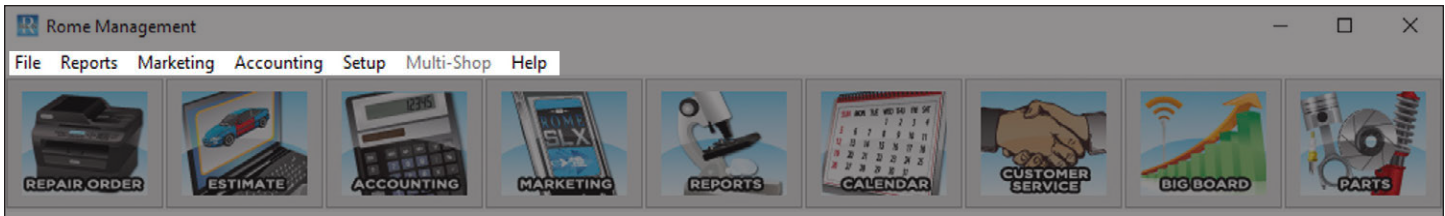
1. Double-click on the Rome Management icon on user computer screen.
2. The Rome Management identification screen will appear along with a log-on box.
3. Click in the "User Name" window and type user name and password.
4. Click Tab.
5. Type your password.
6. Press Return or click on the OK button.

A screenshot of a Windows-style dialog box titled "Logon" with a close button (X) in the top right corner. On the left side of the dialog is a small icon of a padlock with a keyhole. To the right of the icon are two text labels: "Username:" and "Password:". Each label is followed by a rectangular text input field. Below these two fields, the text "Time Out: 0:01:57" is displayed. At the bottom right of the dialog are two buttons: "OK" and "Cancel". The "OK" button has a blue border and the letter "O" is underlined.

NOTE: If your logon screen disappears and you just see the SLX screen, hit ESC. The logon screen may be hidden in the background.

INTRODUCING ROME MANAGEMENT

- THE MAIN SCREEN



FILE - This menu connects you to the other areas and functions of Rome Management: Some of these functions can also be checked by clicking on the main buttons in the opening screen.

Scheduling – Appointment Calendar - same as the Calendar button

Production – Same as the production button

Big Board – Same as the Big Board Button

Payroll – this is where all of the payroll reports are accessed

Commissions - Reports for your commission techs

Timecard - Reports for your time-card(hourly) techs

Dispatching - Same as the Dispatching button above

Labor Load Level - Displays a report that show how many hours each technician has assigned so you can make a decision on who to give new work to.

Parts Management

Receive Parts - This is for receiving parts outside of the RO.

Receive Credits - This is for receiving credits without having to go into RO.

RO Part Order - This is the same as the Parts button above

Status List

E-mail/quick Messages – This allows you to send a message to another user logged into Rome Management or send an E-mail out of Rome Management.

Quick Message - Allows you to send a message to another Rome management user. Both the sender and recipient must have Event manager running for the message to be sent and received.

E-mail (no attachments/outlook) - This is used to send an email without an attachment from Rome management using Outlook client.

E-mail (attachment and/or not outlook) - This is used to send any e-mail with an attachment or when using a e-mail client other then Outlook.

Send all RO automatic Email - this is used to send all automatic RO emails that are waiting to be sent.

Manually send Automatic RO email - this is used to select specific automatic e-mails to be sent. This also allows for clearing processing emails that cannot be sent.

Manually send Manual RO E-mail - this is used to send any non automatic emails out.

Phone Book - This is a phone book to keep numbers in. It is also the Vendor list.

Fax Log - This is no longer a feature, the menu item is being kept in case it is brought back in the future

Event Manager - This launches the Event Manager application which is required to send messages and receive ticklers.

Print Setup - This is where you can change the default printer for this session of Rome Management. When you logout and back in the Windows default printer will be selected again.

Font Setup - Here is where you can customize the font used in Rome Management.

WARNING: The Rome Management window will be resized to accommodate for the size of the font. If you make the font too large you will expand the window beyond the border of the screen and may prevent you from seeing some of the button you may need to use.

System Path Information - This displays what paths Rome Management uses on this machine. It is used by tech support to help solve problems and the user doesn't need to worry about this.

REPORTS - This menu brings you to reports for Management and Accounting. The same as if you hit the Reports button

MARKETING - This brings you to the same options you'll find on the main screen marketing button.

ACCOUNTING - This brings you to interfaces for Quick Books, AccPac, ADP DMS, ADP GL, UCS Export File and Rome Internal Accounting.

SET-UP - This menu brings you to set-up options (see Set-Up Guide).

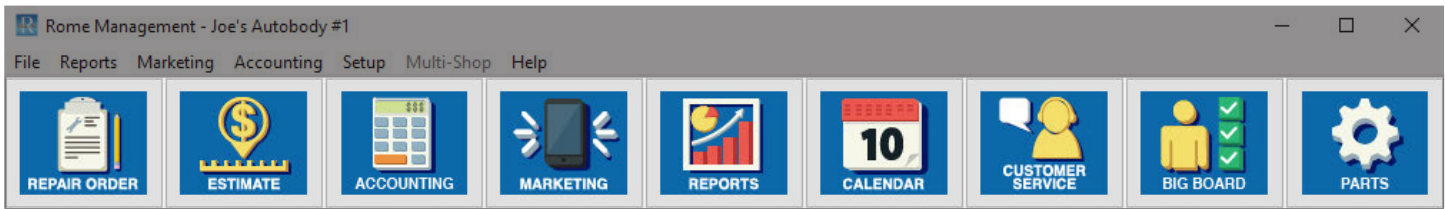
HELP - Reference Guide, Daily Use Guide, Setup Guide, Support, About

The first three lines are links to the various documentation for the product, one of which you are reading right now.

The Support option brings up a screen that has a link to the Rome Tech Bomgar Support site. This site allows you to have a Rome support person login to your machine to help you.

The About option brings up a screen that includes a hyperlink to the Rome Technologies web site, an email link to write an email to support@rometech.com and a link to our support website where you can have a technician login to your machine to help resolve an issue. These features do not work with AOL and only work on machines that have IE and/or a MAPI client installed. The Rome Management version and release date is also displayed here.

BUTTONS



REPAIR ORDER - This button will bring up the list of all the Repair Orders in Rome Management. The list is displayed by default when you open Rome Management.



ESTIMATE - This button opens the Estimating interface where you would import new estimates from whatever estimating system you are using. You do not import supplements from this interface only new estimates. Supplements are done in a different area.



ACCOUNTING - This button takes you to whatever accounting interfacing you are using.



MARKETING - Estimate and Sales Retention and CSI Reports are accessed here.



REPORTS - This is where global reports for Management and Accounting are accessed from.



CALENDAR - This button takes you to the Calendar, where you can schedule appointment and see which cars are scheduled to come in and be delivered.



CUSTOMER SERVICE - This takes you to the Customer Service Status screen that displays which customers need to be called for regular status calls or Date Due changes.



BIG BOARD - This button takes you to the Big Board screen where you can see the progress of all of the jobs in the shop and easily see which jobs have fallen behind.



PARTS - This button takes you to the Parts status screen. This screen is for the Parts department to see which jobs have parts that need to be ordered. Only ROs with the order parts box checked will show up in this section.

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