

R O M E

PBS USER GUIDE

2022

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Linking an RO

The first step is to link any RO you are going to send to PBS to a customer.

Highlight the RO and press the PBS RO button

Rome will query the PBS system bring up a list of possible customers that match the customer information in Rome.

PBS Customer Lookup

Search Options

☒ Last Name Matches

☒ Home or Work Phone Matches

☒ EMail Matches

Lookup	Contact ID	Name	Address City	ST	Zip	Home Phone Work Phone
lName	145287	JUAN MANUEL PEDRAZA				
HPhone	147001	ESTEBAN PEDRAZA	525 S 10TH ST DONNA	TX	78537-0000	956-472-0884 956-821-6538

Search

Manual

RO Info

Select

Insert

Update

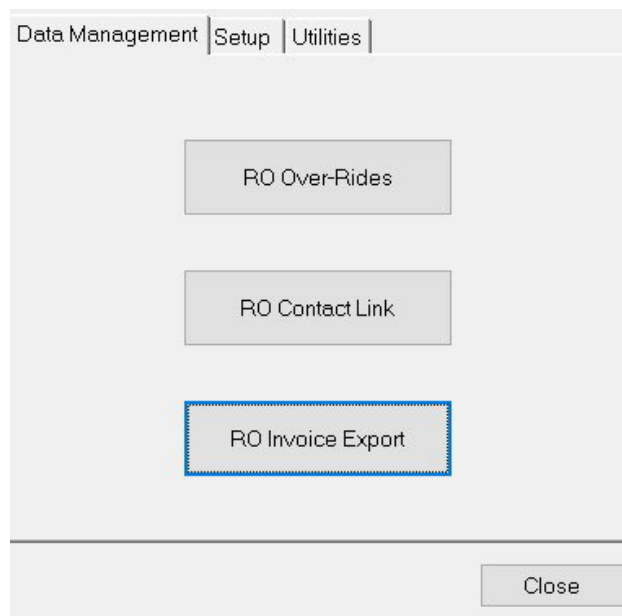
Close

Highlight the customer you want, and press Select. Or if you do not see the customer listed you can press the Insert button and it will add the customer to the PBS system using the name and address information in Rome.

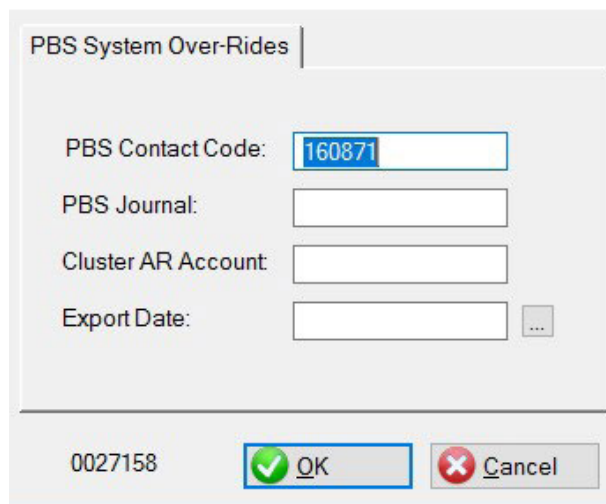
When you close out of this screen the name field for this RO will now be colored green.

Setting an override account

If you need the total of the job to go to a different account than the default body shop A/R account you can override the RO. Press the accounting button at the top of Rome and click the first button RO Overrides.



A list of all the RO's in the system will pop up. Highlight and select the RO you want to change the A/R account on and hit Select.

A screenshot of a dialog box titled 'PBS System Over-Rides'. It contains four input fields: 'PBS Contact Code' with the value '160871', 'PBS Journal', 'Cluster AR Account', and 'Export Date' with a calendar icon. At the bottom, there is a text field with '0027158' and two buttons: 'OK' (with a green checkmark icon) and 'Cancel' (with a red X icon). The 'OK' button is highlighted with a blue border.

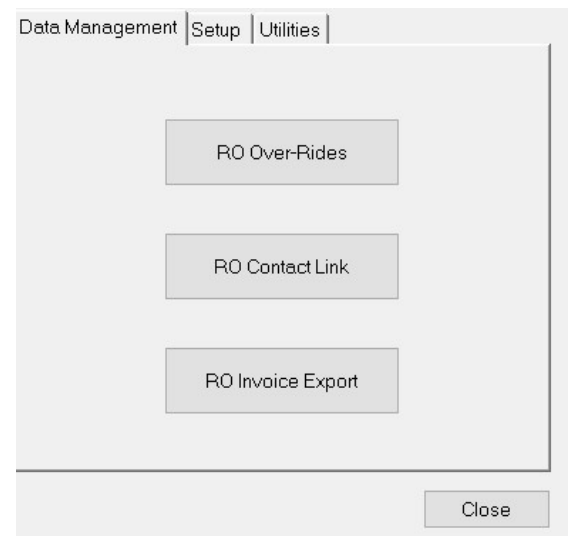
In the Cluster AR Account field you can enter the account that you want the RO to go to when it is closed and exported. If that account is in a different journal you can put that journal number in the PBS Journal field.

Exporting an RO

When the job is closed you can export it over to PBS

Go to the Accounting button and then to the RO Invoice Export button

It will open a window that has any closed AND linked RO's for today.



Repair Orders

Export Options

Starting Date: 1/14/21 Ending Date: 1/14/21 ☒ Include RO's with Cost Only

	RO	Last Name	VIN	Make	Model	Date Out	Balance	Grand Total
<input checked="" type="checkbox"/>	0027012.00	YADO	1C3CDFBB9FD308843	DODGE	DART SE	1/14/21	3,009.06	3,509.06
<input type="checkbox"/>	0027049.00	ROHM	JM1DE1KY5E0172074	Mazda	MDX 4x4	1/14/21	2,741.61	3,241.61

Tag Untag Flip Prev Tag Tagged Load Tags RO Over-Rides Export

Tag All Untag All Flip All Next Tag Export Log Save Tags Close

This is only displaying the RO's ready to be exported that were dated out today. You can change the starting date to an earlier date, and it will display RO that have a Date Out within the date range you have selected.

If you do not see the RO you want there could be two other reasons you don't see it:

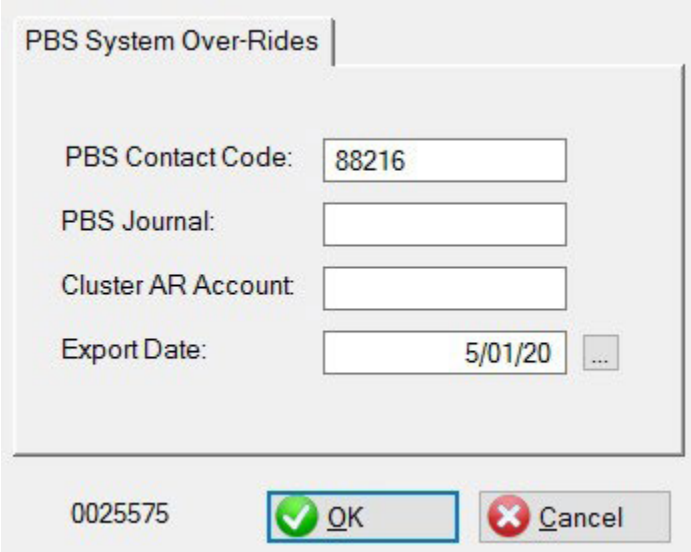
1. If the RO does not have a Date Out it will not appear in the list
2. If you have not linked the RO to a customer(see the first section Linking an RO) it will not show up in this list.

Check the box in the first column of any RO you want to export to PBS. You can use the buttons at the bottom to select multiple RO's. When you have all the RO's that you want to send checked hit the export button and it will export them over to PBS.

The RO's that have been successfully exported to PBS will not show up in this list again so you can't send them over twice.

Re-exporting an RO

In the rare case that you want to re-export an RO that you have already exported to PBS, go to the RO Overrides section and select that RO



The screenshot shows a dialog box titled "PBS System Over-Rides". It contains four input fields: "PBS Contact Code" with the value "88216", "PBS Journal" (empty), "Cluster AR Account" (empty), and "Export Date" with the value "5/01/20" and a calendar icon. At the bottom left is the text "0025575". At the bottom right are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

If you remove the Date from the Export Date field this RO and hit OK, it will show up again to be exported in the RO export list

R O M E

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