ROME

PBS USER GUIDE

2022

PBS USER GUIDE

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

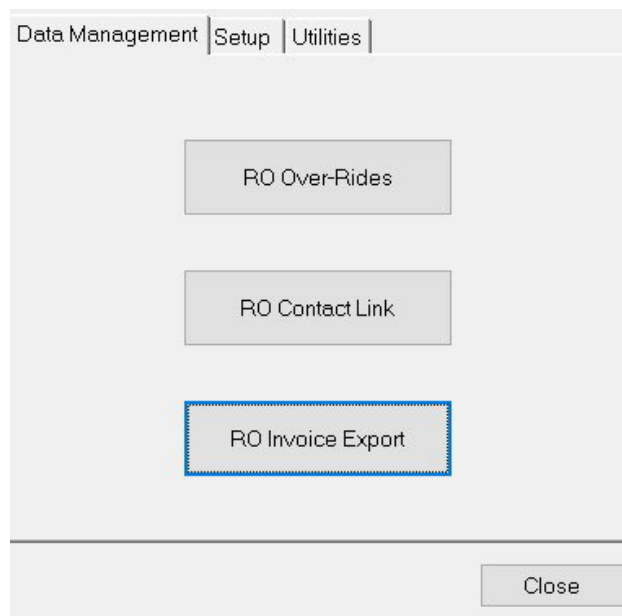Rome will query the PBS system bring up a list of possible customers that match the customer information in Rome.

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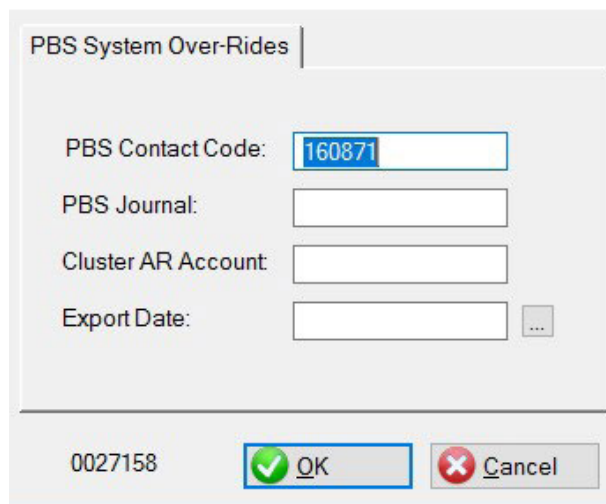
When you close out of this screen the name field for this RO will now be colored green.

Setting an override account

If you need the total of the job to go to a different account then 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.
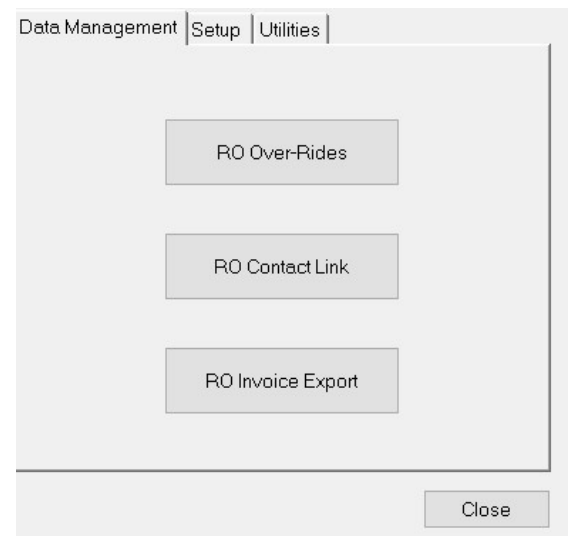

In the Cluster AR Account field you can enter the account that you want the RO to go to when it is closed and exported. If that account is in a different journal you can put that journal number in the PBS Journal field.

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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.

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.

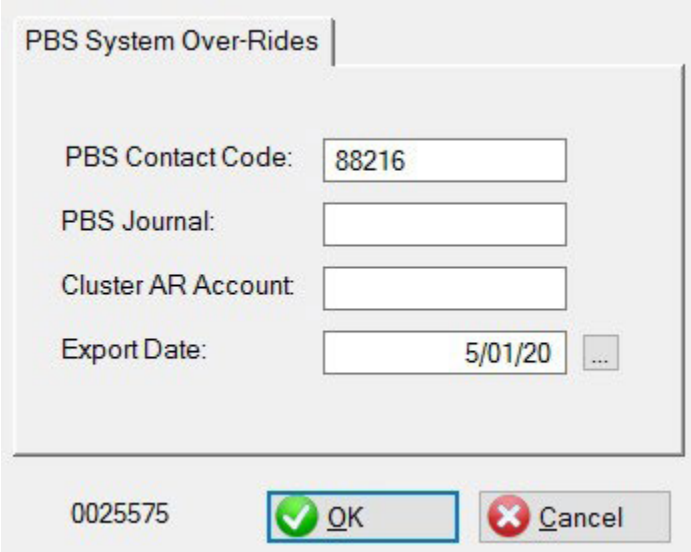If you do not see the RO you want there could be two other reasons you don't see it:

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

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

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