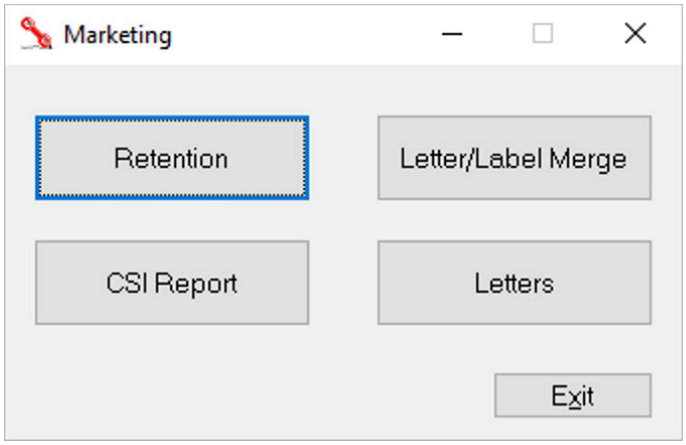
MARKETING

ROME MANAGEMENT USER GUIDE

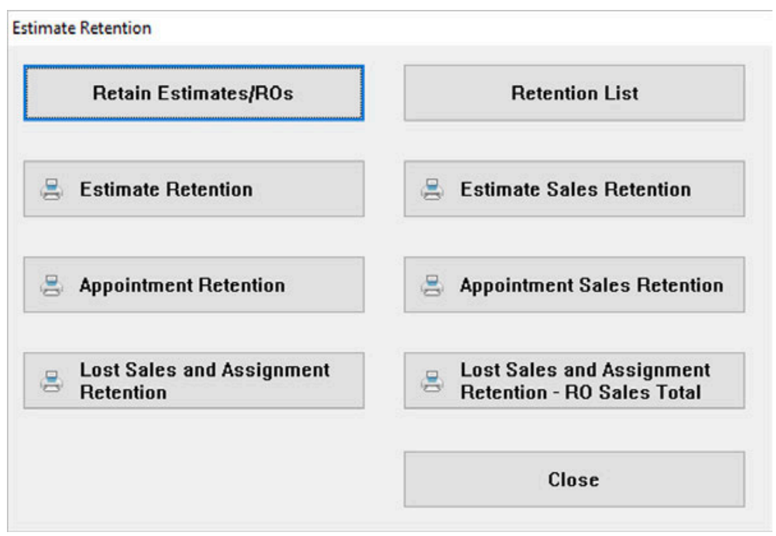
MARKETING

Rome Management has some Marketing reports to track retentions and create CSI reports. They can be accessed by pressing the Marketing Button on the main screen.



RETENTION

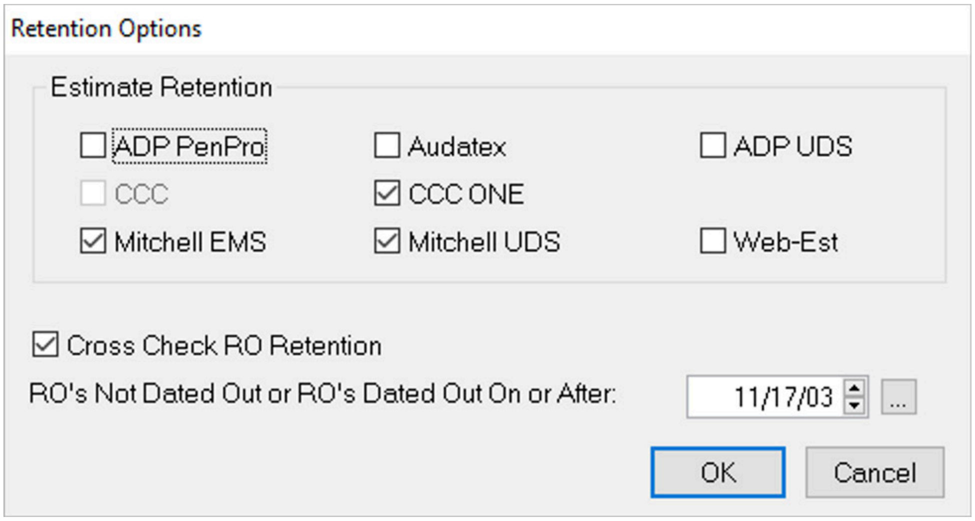
Rome Management has retention reports that can track the estimates you create compared to the ones that become sales to give you the shop's "batting average" of estimates that are turned to sales. Press the retention button to bring up the Estimate Retention window.



The first step in the process is the estimates have to be captured in order for Rome Management to know how many estimates were written. Rome Management does not have access to the estimating systems so it cannot determine when estimates are written.

Only when the EMS files are exported can Rome Management see them and access them. So in order for the retention report in Rome Management to work, all estimates that are created in the estimating systems must be exported as if you were going to import them into Rome.

This will make them accessible so they can be accounted for. Then the Retain Estimates button can be used to record the estimates so it can be compared to how many actually get converted to an RO. When you press the Retain Estimates button the following options screen will be displayed.



Check the box for each estimating system format that you use. Also check the Cross Check RO Retention box, this will make sure that ROs that have already been retained, are not duplicated. Doing these steps regularly, will ensure that you have recorded all the estimates your shop has created. Now you will be able to run the retention reports and get accurate numbers.

Estimate Retention - This report will show all of the estimates that have been retained, how many have been converted and the average.

Sort Method - You can choose to sort the report by Writer, insurance or the date the estimate was retained.

Include - If you choose Insurance or Writer you can then select a specific one or all of them.

Estimate types - Here is where you select which estimating system you want to see on the report.

Date Range - Here is where you choose the date range you want to display on the report.

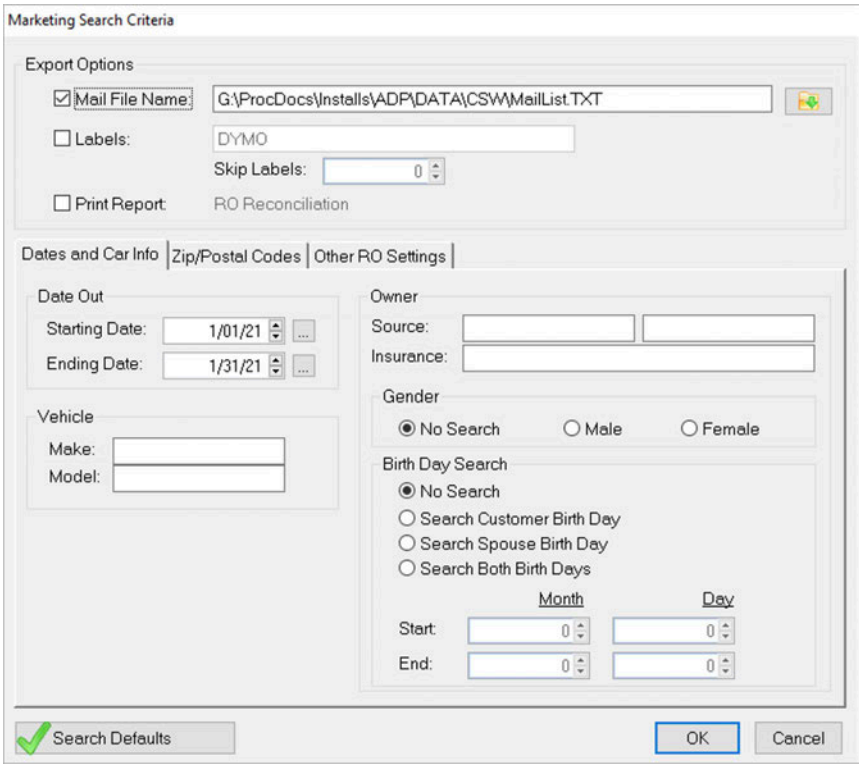
Estimate Sales Retention - This report is the same as the Estimate Retention report except it adds a total for estimates that have been dated out.

Appointment Retention - This report shows what calendar estimate appointments have been converted into repair orders.

Appointment Sales Retention - As with Estimate sales report this will display the total of the repair orders that have been closed.

Retention List - This is a list of all the estimates that have been retained. You can delete and edit the entries but we do not recommend you do so.

Letter/Label Merge



This is used for printing out mailing labels or a text file that has customer names and addresses that can be used to import into Word or Excel.

Export Options - Select what output you want to perform.

Mail File Name - Will create a text file in the directory you enter in the field that contain the customer name & address. You can import this into Excel or Word to help you make labels or mailing lists.

Labels - This option will allow you to print labels with the customers mailing address. You enter the label definition that has been setup for the labels you will be printing to, in the field. For more information on setting up Label definitions see the Setup Guide or call tech support.

Print Report - This prints out a list of the repair orders that have a Date Out within the date range you select. The address is not included on this report.

Dates and Car Info Tab

Date Out - Enter the date range of the report. Any RO that has a Date Out within this range will be included in the report.

Vehicle - Here you can enter a specific Make and/or model to run the report by.

Owner - Here you can select to run the report by a specific insurance company, Source of Business or the Gender of the customer. In order for the Gender search to work you would have to have selected the Gender in the Miscellaneous tab of all your RO's.

Zip Postal Code Tab - In this tab you can enter up to 10 zip codes to filter the report by to see where your sales are coming from geographically.

Other RO Setting tab

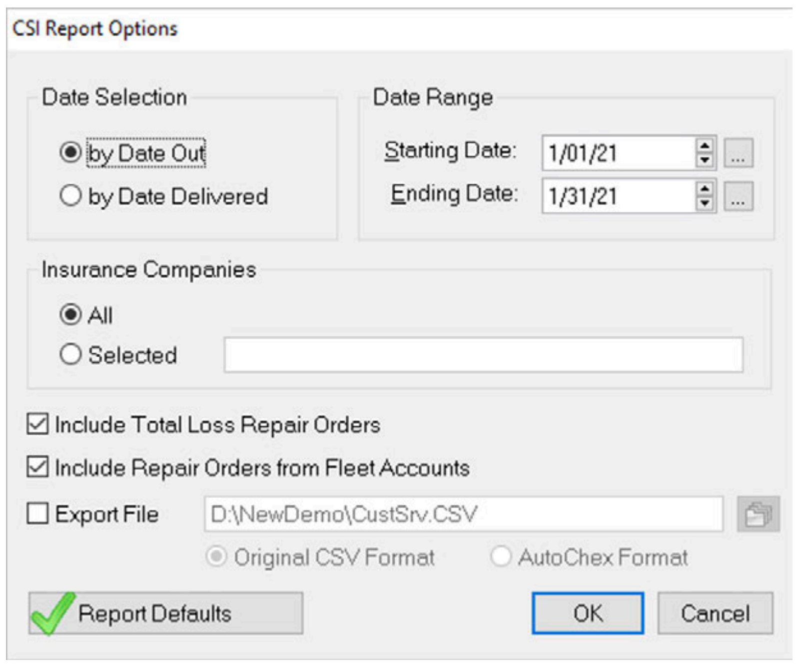
Include Total Loss ROs - Here you can choose to run the report for RO's that are total losses, ones that are not, or a combination of both.

Include Fleet Account ROs - Here you can run the report by RO's that have a fleet account, ones that don't or a com bi nation of both.

Include CS/ ROs - Here you can chose to run the report for RO's that have been marked to be excluded from the CSI report. In the Additional Info button of every RO there is a box you can check to mark it so it does not print on the CSI Report.

CSI Report

This is for creating a file that can be imported into Excel or given to a CSI company to analyze Sales data.



Date Selection - This is where you select which date field you want to use as the search criteria of the report. It will use Date Out or Date Delivered depending on your selection.

Date Range - Here is where you choose the date range of the data. Based on your choice in the Date selection section above, any RO that has a date that falls within the date range you select here will be included in the data.

Insurance Companies - Here you can choose to display all the insurance companies or just a selected one.

Include Total loss ROs - Check this box if you want to include RO's that have been marked as a Total Loss.

Include ROs from Fleet Accounts - Check this box if you want to include RO's that have been-assigned to a fleet account.

Export File - Here is where you chose the filename and directory of the file that will be created. The directory must exist on your computer in order for the file to be created. You can chose Original CSV format which can be imported into Excel and other programs or the Autochex format which is used by the Autochex CSI company.

ROME

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