REPAIR ORDER

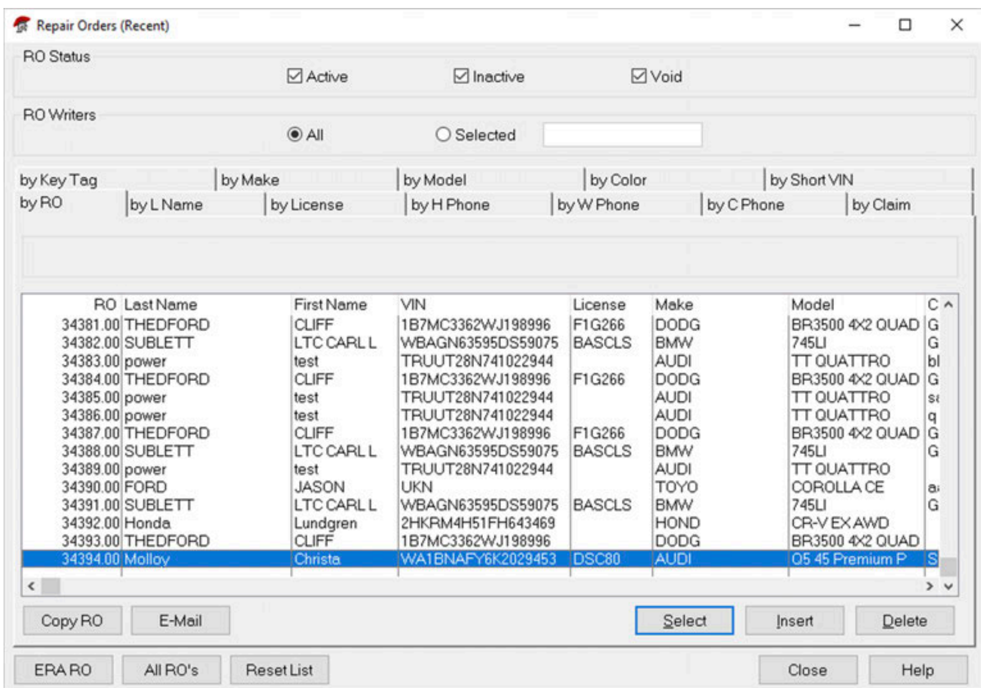
ROME MANAGEMENT USER GUIDE

REPAIR ORDER

REPAIR ORDER LIST BOX

The RO list box defaults to display all active ROs and ROs with a Date Out within the last 60 days. There are two filters at the top of this screen: RO Status and RO Writers RO status will allow you to display or hide Active, Inactive and Void ROs if you check and uncheck the appropriate boxes. The RO Writers filter will allow you to display a single writers ROs. Put the dot in Selected and enter the Writers name in the field and any RO that has that writers name if either the Writer 1 or Writer 2 field will be displayed.

The top of the list box has tabs along the top that will sort the ROs by that category. The categories are: RO number, VIN, Last name, License plate number, Home Phone, Work Phone, Claim#, Key tag#, Make and Model. Once you select a tab to sort by you can type the first few characters of what you what to find and Rome Management will go to the first RO that starts with those letters.



For instance, if you wanted to find an RO for a customer named John White. You would click the by Last name tab in the RO list box and then type the letters “WHI”. It will find and stop on the first record that starts with “WHI”. It may stop on Whim mer but White should only be a couple of rows down.

Copy RO - This button is for creating a new RO with the same customer info as a previous RO. See “Creating a RO with the Copy RO button” for more information

Select - This will open the highlighted RO

Insert - This will create a new RO. See “Creating a RO from the RO list Box” for more information.

Delete - This will delete the highlighted RO from the system. The system will not let you delete an RO if you do not have permissions or if there is ANY cost applied to the RO. You must un-order all parts and un-assign all techs before you can delete an RO.

ERA RO or ADP RO - If your shop interfaces with Reynolds & Reynolds ERA or ADP Dealership Management System (DMS) you will have a button under the Copy RO button for linking tickets to the DMS.

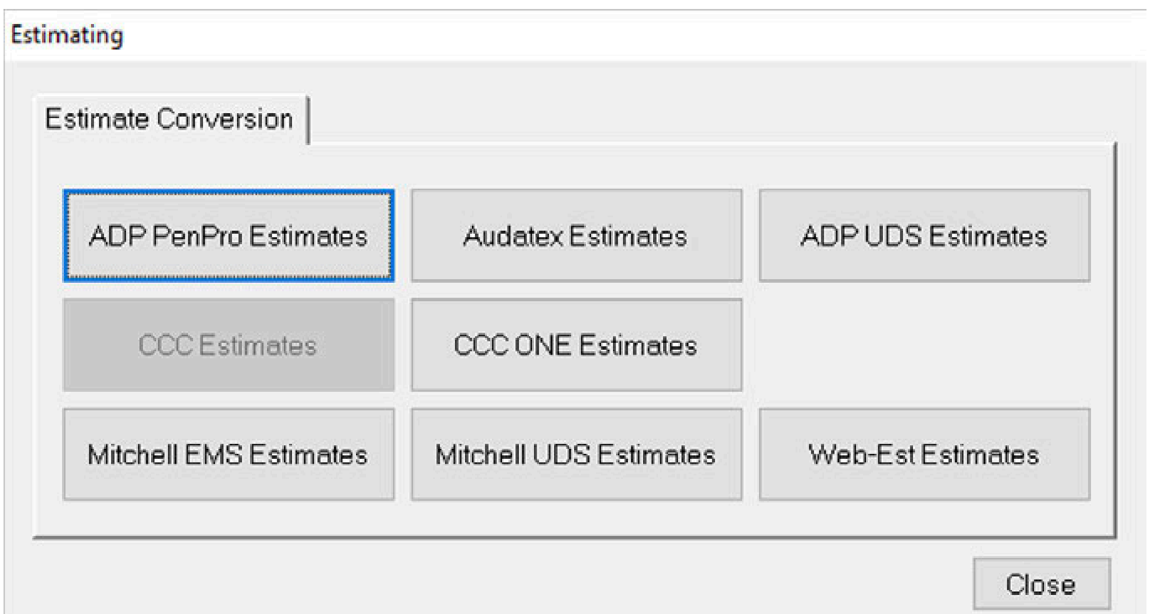
All ROs - This will open a new window that will display every RO in the system since you began using Complete Shop. So if you need to look at a ticket that was closed months ago you can use this button to access it.

Reset List - This will force a refresh of the list and add or remove ROs that may have been changed since you opened the RO list

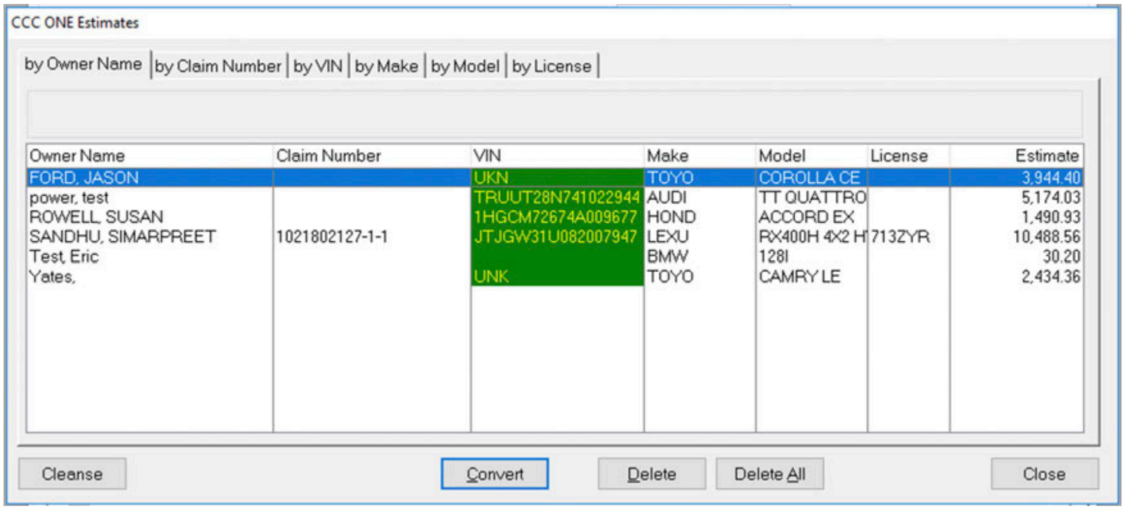
Close - Will close the RO list Box but not the whole program.

Help - Does not function at this time

ESTIMATING SCREENS



The Estimating window shows the different Estimating programs Rome Management interfaces with.



This screen lists all the estimates that have been exported from whatever estimating system you selected. Like the RO list screen it has tab at the top that when you select them will sort the list by category selected. The categories are: Owner name, claim number, VIN, Make, Model, license#. Once you select the tab you want to sort by you can type the first few letters you are looking for and it will go to the first estimate matching those letters.

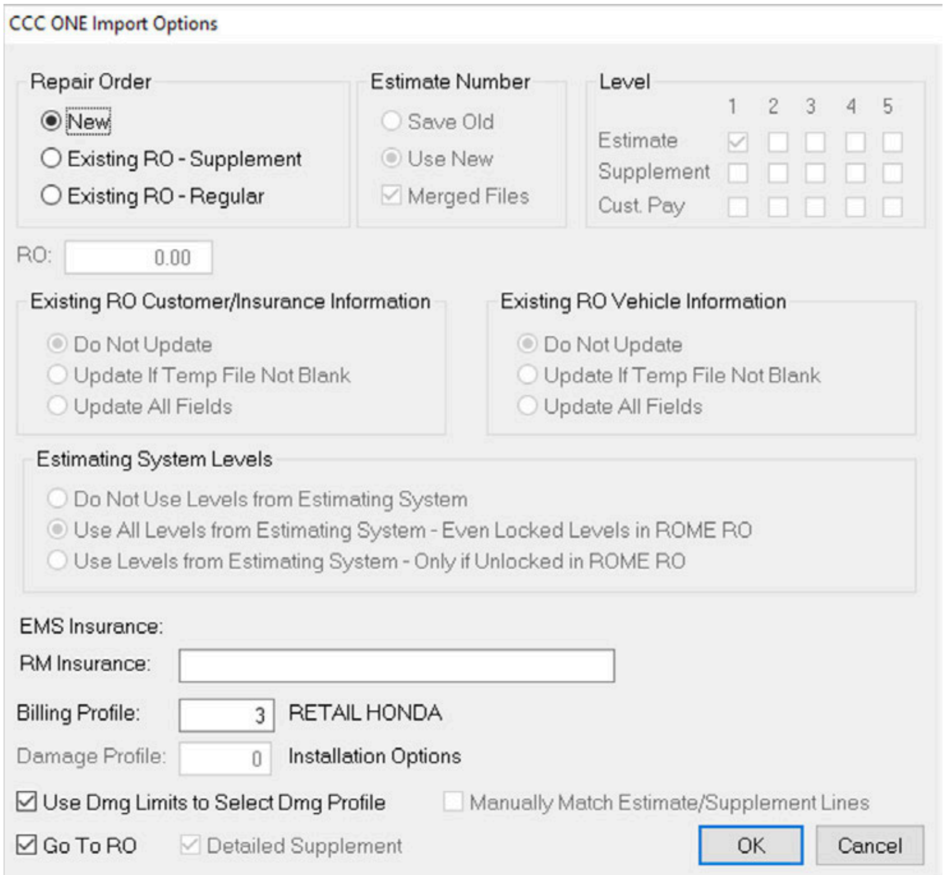
Cleanse - This will remove estimates that have never been imported, ROs that have been dated out at least seven days. Estimates for active jobs will stay in here so supplements can be brought in properly. This lets you clean out this list without interfering with active jobs. The time it takes for this window to open will be reduced if you clean it out.

Convert - This will start the conversion process on the highlighted RO. you will be taken to the import option screen. Generally new ROs should be opened from the Calendar.

Delete - This will delete the highlighted estimate from the list. Make sure the job is not active because this may affect the ability to bring in supplement properly.

Delete all - This will delete all of the estimates from this screen. This is not recommended if you have active jobs with possible supplement. Use the Cleanse button to remove unneeded estimates safely.

When you press the convert button you bring up the following window:



This screen lets you choose what kind of Repair Order you want to convert.

New - Creates a new repair order in the system.

Existing RO - Supplement- This option should not be used

Existing RO - Regular - This is will import estimate into an existing RO as an original estimate. You must specify which RO number you importing to.

Estimate Number Section - Tells Rome this estimate will be used to bring in any supplements. Since most ROs will only have one estimate assigned to them this should be set to “New.”

Estimate Number Merged Files - Tells Rome to merge duplicate lines into one. It is checked by default and should be let checked.

RO field - Will become active if the Existing RO is chosen. This is where the estimate will be imported into. If a number that doesn’t exist is typed, hit tab the RO list box will pop-up. Choose a valid RO number.

Existing RO customer/Insurance and vehicle information - If you are importing into an existing RO you can tell Rome Management to keep or overwrite the customer and vehicle information in the RO with the customer and vehicle information in the estimating system. If you are confident the Rome Management RO has correct and complete info you can select Do Not Update and that info will be preserved. If you think Rome Management is inaccurate or incomplete then you can choose one of the two updates options to overwrite Rome Management with the information in the estimating system.

Billing profile - This field will only be available if you are making a new RO. You enter the number of the billing profile you wish to use here. If you enter an invalid number the billing profiles list will pop up and you can choose that one you want. It is important that you choose a billing profile that has the same labor rates as the estimate you are pulling in. If new lines are inserted in the future they will be at the rate of the billing profile, so make sure they match. (see setup Chap 4 for more info about billing profiles)

Damage profile - You enter the number of the damage profile you wish to use here. This field will not be available if you check the use damage limits to Select Damage Profile box. The program will automatically assign a damage profile. See setup chap 4.1 for more info on Damage profiles and limits.

Go to RO box - If checked you will be taken into the RO you are importing into directly after the conversion in finished.

Detailed supplement box - If checked Rome Management will record the lines that are being sent and what RO they are going into. This prevents lines from being duplicated when you bring supplements in from this estimate in the future. This function has been disabled in the new interface as it is no longer needed.

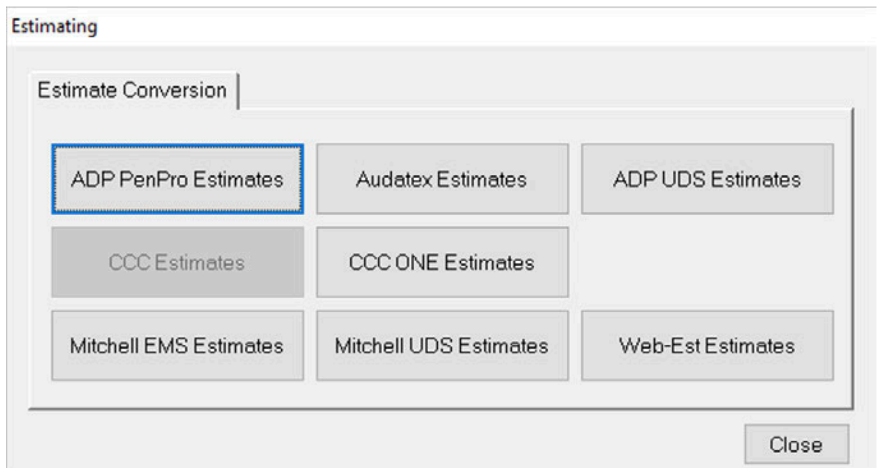
CREATING A REPAIR ORDER

There are three ways to create an RO in Rome Management:

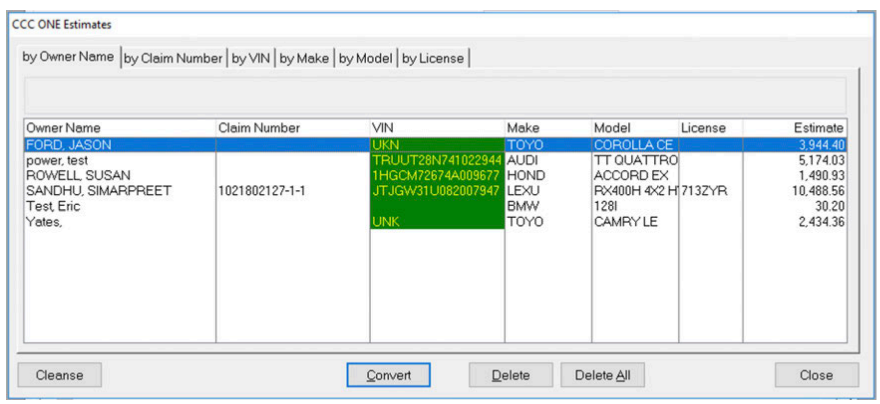
- Convert from an appointment (red calendar entry).
- Click the insert button on the Repair Order screen.
- By selecting a RO for Repeat customer and clicking the copy RO button at the bottom of the RO list screen.

IMPORTING INTO AN RO FROM AN ESTIMATING PROGRAM

1. Click the estimating button on the Rome management main screen. You should see the following window pop-up. This displays the different estimating systems and formats Rome Management can import from.



2. Click the estimating program you'll use to convert the estimate. This will bring up the estimate list screen which lists all of the estimates that have been exported from that particular program.



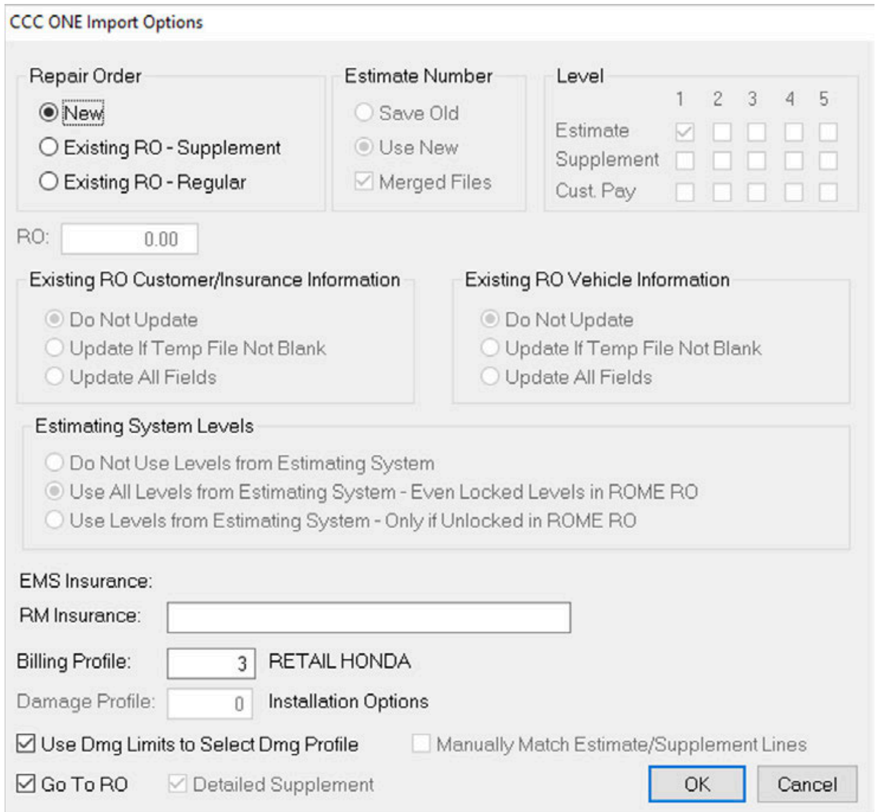
3. Choose to sort by Owner Name, Claim Number, VIN, Make, Model, or License by clicking the appropriate tab, you may then type the first few characters of your sort method to find the estimate you are looking for.

ROME

4. Click on the estimate to highlight it, then select the Convert button. You are now in the Import Options screen.

5. Since you are creating a new RO leave the button in New and the check in Estimate 1.

6. Enter a Billing Profile number in the Billing Profile field. It is important that you choose a billing profile that has the same labor rates as the estimate you are pulling in. If you insert new lines to this RO in the future they will be at the rate of the Billing Profile, so you want to make sure they match. See Setup Chapter 4 for more info about Billing Profiles.



7. If the Use Damage Limits to select Damage Profile box is checked you will not have enter a Damage Profile. If you want to select a Damage Profile uncheck this box and enter the profile's number. See Setup Guide section 4.2 for more information on Damage Profiles and Limiter.

8. The "Go to RO" check box is for going right into the RO after the conversion is done. If you are doing more then one estimate you want to leave this unchecked.

9. Press the OK button and the estimate will be converted into a Rome Management RO. You will see a progress bar and then it will disappear. This RO will be assigned the next number after the highest RO number in the RO list. If you checked the Go to RO box you will taken directly into the RO file. If not, you may select another estimate to convert.

CONVERTING AN ESTIMATING APPOINTMENT (RED CALENDAR ENTRY)

Open the calendar by selecting the Schedule button on the main screen. Go to the day of the appointment you are going to convert and double-click on the day. Highlight the appointment and press the Convert button. A new RO will be created at the end of your list and whatever customer information was in the appointment will be filled in. You may then import an estimate from your estimating program as explained in the “Importing into an existing RO” section below.

CREATING AN RO FROM THE RO LIST BOX

If you select the Insert button in the RO list you will create a new RO that will have the default billing and damage profiles and be the next number in the list. You will need to fill out whatever fields that management setup as required, when you do so you will be able to hit OK and save the RO. You may then import an estimate from your estimating program as explained in the “Importing into an existing RO” section below.

Tow in check box - Checking the Tow In check box will disable the required fields except for the VIN. This is for when you get a tow-in and you don’t have any info about the customer, but you still want it to be in Rome Management to track that you have the vehicle on your lot. You check this box and enter the VIN and it will allow you to create the RO. If you enter info in any other field the required fields will be turned back on.

CREATING A RO WITH THE COPY RO BUTTON

If you have a returning customer and their vehicle and contact info has not change since the last time they visited you can use the Copy RO button to make a new RO that has the same customer info as their previous RO. You must first find the previous customer RO in the list box. You can use the search function explained in the beginning of this chapter to help you find it quickly. Once you have the RO highlighted press the Copy RO button and a new RO will be opened. You should verify that the information in the customer screen is correct and fill-in any missing or required information. Then press OK and the RO will be created. You may then import an estimate from your estimating program as explained in the “Importing into an existing RO” section below.

IMPORTING INTO AN EXISTING RO

If you need to import an original estimate into an existing RO you use the same procedure as before with a few changes.

1. Press the Estimating button to open the Estimating and select the estimating program you use.
2. Find the Estimate you need, highlight it and then press convert.
3. In the Import Options screen, you want to make sure you select New- Existing RO.
4. When you select that the RO number field will become available. Fill in the RO number the estimate will go to. If you don't know the number you can type in a bogus number and hit Tab and the RO list will pop-up so you can select the RO you need.
5. The other fields in the screen should be left as they are. Rome Management has been designed to create an RO based on the information contained in the EMS extract files.
6. Check the Go to RO box if you want to go right into the RO after the estimate in imported in.
7. Click OK and the estimate will be converted and added to the existing RO.

NOTE: The billing and damage profile field will be grayed out because the RO already has those and they don't need to be selected