

SDS Integration -Decisiv Work Orders

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Introduction	3
Work Order	3
Parts, Labor And Hours Received	4
Parts Availability / Service Estimate	5



SDS Integration of Decisiv Work Orders

Introduction

Document data sent from Decisiv to SDS is available on an SDS Point Of Sale work order. The parts attached to the work order can be imported into a document with the use of the Parts Availability / Service Estimate option. From Parts Availability, a user can reserve, order or invoice the parts.

Work Order

The work order is created in SDS Point of Sale:





Parts, Labor And Hours Received

Parts, labor and hours received are available for each operation:

		<u> </u>	<mark>>)</mark>			E		
Additional Options	Sold To Detail							Alerts
Manufacturer	Address / Stock #	Document #	Document Descript	ion	Date	Status		DM
Parts Availability	TRAN56	BP02231	B.R. SERVICE		07/16/18	OPEN		WC PO
Service History	TT I							
Open Work Orders	12DPW Op Line # Qty	Vend Part #	Descrip. Bin#1	Price				<u>FA</u> b <u>R</u>
Work Order List	C- R12 TO	QUE ALL WHEELS					\$	W <u>V</u> <u>W</u> D
Address Maintenance								
Reprint Work Order	C1 0010 ** 0m	ration Level Complaint				_		
Print Pick List	D- R13 CH	CK TIRE PRESSURES						
Reprint Complete Cust. Inv.							Tota	ls
Email Invoice							Spec. Ord. Parts	. 00
Authorize Invoicing	D1 0020 ** Op	ration level Complaint					Total Available	.00
POS Security History							Document Total	.00
	PCES INVENTAIRE							
Create / Display Reservations	Line 0010 📄 Vendor	?	Or	der Screen 🔽	Tax 1 🔤	? Tax 2 🗌 ?	?	
Create / Display P.O.	SC PI ? Operatio	n	Ad	d To History	Discount Code	2		
Claims / Operation	Quantity Part #		2 Car	usal / Failed	Charged To	2		
Electronic Punch	Price	Dis	p. Price Cla	im Invoice	C/I/W =	Customer 👻	•	
All Notes	Core	Ba	se 9 Priority 🤤 ?					
Import a Service Quote	Î							
Copy A Document								
Line / SC Access	General Modifications Gen.	Oper. <u>A</u> ssignment Add / <u>U</u> p	Operations Zone	Clo	ose	Hold		
	Part <u>G</u> roups	Service Pac <u>k</u> ages	Totals		-	-		

Double-click on an operation for total amounts (parts and labor):

	4	<u>~</u>			
Additional Options	Sold To Detail				Alerts
Manufacturer	Address / Stock #	Document #	Document Description	Date Status	DM
Parts Availability	PORTOD - OPERATION C - (X51	001-31)	A.A. MINING	Michael Mich	WC PO
Service History					PV PR
Open Work Orders					WV WD
Work Order List				E	. THE
Address Maintenance					
Reprint Work Order		ob / Table (OP Code)	Description Job Code / Service Tabl	e / Other	
Print Pick List		R12	· · · · · · · · · · · · · · · · · · ·		
Email Invoice		C/I/W Recall #			Totals
Authorize Invoicing		=Custoner 🔻		Estimated	rd. Parts .00
POS Security History			Parts 1550 Labor 11	500 Time 100 Shop Supply Charges 🔽	vailable .00
		claim to farmation	A D !! #	Deallined Maintenance	
Create / Display Reservatio		<u>c</u> laim information	Access Recall #	Declined <u>M</u> aintenance	
Create / Display P.O.					
Claims / Operation	Quantity		Causal / Failed	Standard Line Standard Ta	
Electronic Punch	Part # Price	Disp. Pric	Warr. Part Returned	C/I/W =Custoner -	
All Notes	Core	Base 9	Priority ?		
Import a Service Quote	a				
Copy A Document					
Line / SC Access	General Modifications Gen. O	per. <u>A</u> ssignment Add / <u>U</u> p Opera	ations <u>Z</u> one	Close Hold	
	Part <u>G</u> roups	Service Pac <u>k</u> ages	<u>T</u> otals		

*Mapping Decisiv to SDS

Unit Price total = Parts

Labor Time = Time

Labor Total = Labor



Parts Availability / Service Estimate

Use Parts Availability / Service Estimate to reserve, order or invoice the parts onto the document. Click on the Parts Availability button:

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Additional Options	Sold To Detail					Alerts
Manufacturer	Address / Stock #	Document #	Document Description	Date	Status	<u>D</u> M
Parts Availability	TRAN56	BP02231	B.R. SERVICE	07/16/18	OPEN	WC PO
Service History F12	пт					PV PR
Open Work Orders	12DPW Op Line # Qty	Vend Part #	Descrip. Bin#1 F	Price		
Work Order List	L- ΚΙΖ ΙŪΚŲ	JE HLL WHEELS			-	VV <u>v</u> <u>vv</u> D
Address Maintenance						
Reprint Work Order	C1 0010 ** Oper	tion level Complaint				
Print Pick List	D- R13 CHEC	TIRE PRESSURES				
Reprint Complete Cust. Inv.						7.1.1
Email Invoice						Spac Ord Parts
Authorize Invoicing	D1 0020 ** Oper	ation level Complaint				Total Available
POS Security History						Document Total .00
	PCES INVENTAIRE					
Create / Display Reservations	Line 0818 Vendor	2	Order Screen	Z Tax 1	2 Tax 2 2	
Create / Display P.O.	SC PI ? Operation		Add To Histo	ory ? Discount Code		
Claims / Operation	Quantity		Causal / Faile	d 🚽 Standard Line	?	
Electronic Punch	Part #	Dia	Warr. Part Re	eturned 📃 Charged To	?	
All Notes	Core	Bas	Priority 2	c/1/w	=customer 👻	J
Import a Service Quote	•					
Copy A Document	•					
Line / SC Access						
	General Modifications Gen. O	per. <u>A</u> ssignment Add / <u>U</u> p	Operations Zone	Close	Hold	
	Part <u>G</u> roups	Service Packages	Totals			

Parts received are saved in Service Estimates:

<u>S</u> ummary ddress #	<u>D</u> etail]						
ddress #								
ocument Type	TRAN56 TRANSPORT B CSERT1	SERTI		Sales Code PI ? T1 Code ? T2 Code ? Disc. Code ?	Base History Charged To	9 ? =Custoner V		
ser ID urchase Order #	SDS	р	assword ****	Operation T1 Method 3=Sepa	arate Taxes			
rt # (?, ?I)	C	Quantity \	Vendor Descri	otion Avai. Qty E-	Price Comment	S		
							*	
								Totals
							*	Document # Of Lines List Above Without Core
Sa <u>v</u> e D	Draft		<u>U</u> nit / I	xtended	Zo	ne 2		minut core
<u>C</u> reate Reservations			A	dd To Document				
rt	dress # cument Type Id By rchase Order # # (?, ?t) \$ave I	dress # TRANS6 TRANSPORT Cument Type B Id By CSER11 er ID SDS rchase Order # # (?,?) # (?,?) Saye Draft <u>C</u> reate Reset	dress # TRANSO IN SERTI RANSPORT SERTI er ID SDS F # (?, ?i) Quantity Saye Draft 	dress # TRANSO ACC TRANSPORT SERII cument Type B ld By CSERTI er ID SDS Password ++++ # (7, 7) Quantity Vendor Descript # (7, 7) Quantity Vendor Descript Saye Draft Unit / K	dress # TRANS6 Sales Code [P] ? TRANSPORT SERTI TI Code ? d By CSERTI TI Code ? er ID SDS Password Disc. Code ? operation TI Method 3-Sepation 3-Sepation # (?, 7) Quantity Vendor Description Rvai. Qty E- Saye Draft Unit / Extended	dress # TRANSPORT SERII cument Type B Ti Code id By CSERTI er ID SDS Password ***** The Media Ti Code ? Charged To Disc. Code ? C.11/W Operation Ti Method * (?, 7) Quantity Vendor Description Avai. \$ (2, 7) Quantity Vendor Saye Draft Unit / Extended \$ Zore \$ dd To Document	dress # TRANS6 TRANS6 TRANS6 TRANSFORT SERII cument Type B Tacode Tacode Tacode Tacode Tacode r ID SDS Password Tacode Tacode Tacode Tacode Tacode r ID SDS Password Tacode Tacode	dress # TRANSO 10 SERII B Sales Code P? 8 Base 9 Pittory 2 Charged To 2?



Service Estimates are grouped and identified by customer ID, Repair Order # and Operation ID:

SUPPORTOD - Part List Invoicing - Service Estimates (Selection) - (X51006-4) Action Help Clear All Fields Access T1 Method Reservation Inquity / Update List Importation Saved Drafts Part Quotes Part Catalogs Internet Sales Service Quotes Service Estimates	PARTS AVAILABILITY BP02231 - Summary (Zone 1)
Clear All Fields Access T1 Method Reservation Inquiry / Update Ist Importation Saved Drafts Part Catalogs Service Estimates Service Estimates	-4)
Clear All Fields Access T1 Method Reservation Inquiry / Update Est Importation Saved Drafts Part Catalogs Internet Sales Service Estimates Service Estimates Position To Date (MMDDYy) Time (HHMMS5) @7/16/10	
Case Uprafs Part Quotes Part Quotes Part Catalogs Internet Sales Service Quotes Service Estimates Position To Date (MMDDVY) Time (HHMMSS) @7/16/18	vice Estimates Internet Sales
Position To Date (MMDDYY) Time (HHMM55) B7/16/16 14:41:25 0	User Date Time DC2_ED 07/16/18 14:41:25 DC2_ED 06/21/18 06:45:44 DC2_ED 06/21/18 06:45:44 DC2_ED 06/71/18 15:40:80:81 DC2_ED 06/71/18 15:32:40
Save Draft Unit / Extended Zone 2	Time (HHMMS5) 14:41:25 2 Access
<u>Save tran</u> <u>Unit / Extended <u>Zone 2</u></u>	Add To Document

Double-click on an estimate and import the part(s) using the Invoice button:

SDSWin ²		6	E	F.C.		PARTS BP02231	• Summary (Zone)	v s
SL	JPPOR .ction	SUPPORT00 - Part List Invoicing Action Help	- Service Esti	imates (Parts) - (X5100	06-C)	-		
Clear All Fields Access T1 Method Reservation Inquiry / Update Ist Importation Saved Drafts Part Quotes Part Catalogs Internet Sales Service Quotes Service Estimates			List Name Distance Di	₹231 D ant# 13-1800	Dete B7/16/18 Description BUSILING-P1N SPRIN	Time 14:41:25 Quantity 1.80	*	Totals lable ument f. Lines Above nout Core
		Sa <u>v</u> e Draft	Un	it / Extended	Zone 2			
		Create Reservations			Add To Document			



Once a part is imported into Parts Availability, a user can reserve / order with the Create Reservation button or invoice the part(s) onto the document using the Add To Document button:

	K 🛛 🔊	>	8			
Clear All Fields Access T1 Method	<u>S</u> ummary <u>D</u> etail					
Reservation Inquiry / Update Ltst Importation Saved Drafts Part Quotes Part Catalogs	Address # TRAN56 TRANSPORT SERT Document Type B Sold By CSERT 1 User ID SDS Durchose Order #	Password ****	Sales Code PI ? Base T1 Code ? Hist T2 Code ? Cha Disc. Code ? C / 1 Operation ? T1 Mothed ?=Senarate I	e 9 tory ? rged To ? I / W =Custoner •		
Internet Sales Service Quotes Service Estimates	Part # (?, ?!) Quantit B13-1000 1.06	ty Vendor Descripti 9 PAC BUSHING-P	on Avai. Qty E-Price IN 2.00 32.85	Connents OK 83A84		
					Tota Available	ls
					Document # Of Lines List Above Without Core	1 37.77 37.77
	Save Draft <u>C</u> reate Reservation:	Unit / Exte	ended <u>A</u> dd To De	Zone 2 ocument		

Here is an example of a part added to the document by means of the Add To Document button:

		<u> </u>	<mark>≫</mark>				l
Additional Options Manufacturer	Sold To Detail Address / Stock #	Document #	Document Description	Dat	e Status		Alerts DM
Parts Availability Service History Open Work Orders	TRAN56 TT I 12DPV Op Line # Qty C- R12 TORQ	BP02231 Vend Part # UE ALL WHEELS	B.R. SERVICE Descrip. Bin#1	07/16 Price	18 OPEN		N <u>C</u> P <u>O</u> PV PR W <u>V</u> WD
Address Maintenance Reprint Work Order Print Pick List	C1 0010 *** Oper C1 0010 PI 1.0	ation Level Complain 0 PAC B13-1000	t BUSHING-PI 03A04 1	32.85		2	
Reprint Complete Cust. Inv. Email Invoice Authorize Invoicing	D- R13 CHEC	K TIRE PRESSURES ation level Complain	t		*	Totals Spec. Ord. Parts Total Available	.00 37.77
Create / Display Reservations	PCES INVENTAIRE		Order Scree	en 🔽 Tax 1	? Tax 2 ?	Document Total	37.77
Create / Display P.O. Claims / Operation Electronic Punch All Notes	SC PI ? Operation Quantity Part # Price Core		Add To His Causal / Fai Visp. Price Uses 9 Priority 2 Claim Invoi	tory ? Discount Co iled • Standard Li Returned Charged To ce C / I / W	de ? ne ? customer •)	
Import a Service Quote Copy A Document Line / SC Access							
	General <u>M</u> odifications Gen. C Part Groups	per. <u>A</u> ssignment Add / <u>U</u> Service Packages	Ip Operations <u>Z</u> one Totals		Hold		