

A decorative graphic consisting of numerous small squares in yellow, green, teal, and blue, scattered across the upper left portion of the page.

SERTI

Paccar - Decisiv
Integration With SDS

Paccar - Decisiv Integration With SDS

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Introduction

In order to sync Decisiv databases with SDS databases, it is possible to generate three different data templates in SDS: Assets, Customers and Operations. These templates can be uploaded to Decisiv to make the SDS data available on its system. This will allow users to use the SDS data within Decisiv when creating new Cases.

During the Open Case process, the customer Credit Check info from SDS is displayed in the Customer Info section of Decisiv.

When a Case is ready, it can be sent to SDS using the "Export Case To Repair Order" button in Decisiv. The SDS AutoPrint option can be used to automatically print a Repair Order created from a Decisiv Case. When a Repair Order is successfully created in SDS, the Repair Order number will be sent back to Decisiv and will display in the Case. Once the Repair Order number is linked to the Case on Decisiv, Case updates can be sent back to the existing Repair Order in SDS.

The Case data sent (i.e.: parts, labor, comments) will be available on the SDS Repair Order.

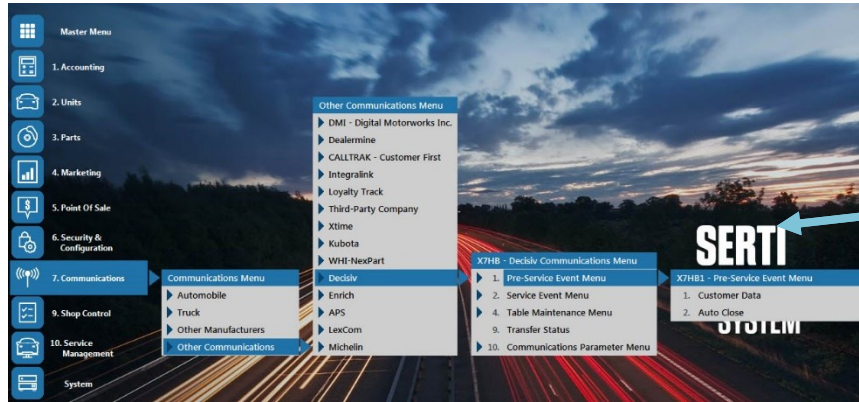
The SDS Push Parts option allows you to send all parts entered on the SDS Repair Order to the Decisiv corresponding Case.

Finally, the SDS Auto Close option allows you to automatically close the Open Cases after Repair Orders have been closed and posted in SDS.

Data Templates And Data Load

The following three data templates can be generated at any time in SDS: Customers, Assets and Operations. Once the data in the templates is correct, it can be loaded by Decisiv to make it available when you are working on a Case. This is quite useful during the activation step for configuring Decisiv databases and, consequently, avoiding the need to manually key in the data every time a Case is opened on Decisiv.

Data Templates – Generating The Data File In SDS

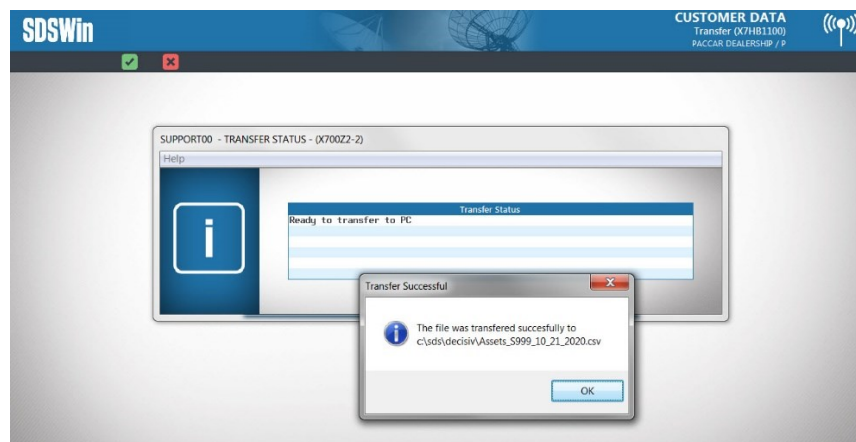


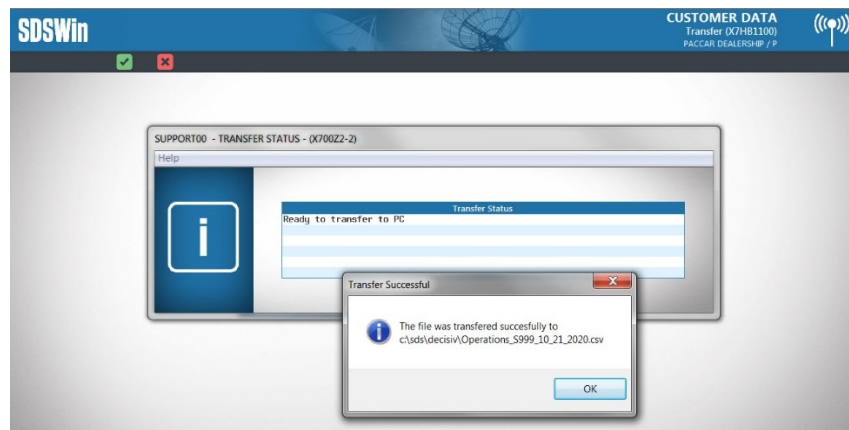
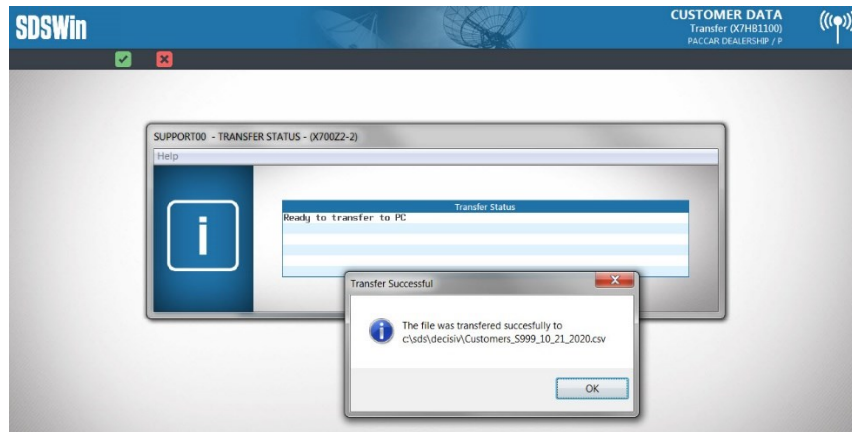
To generate the three data templates in SDS, use the option "X7HB1-1. Customer Data."

Click on the "Transfer Customer Data Immediately" button to execute the template construction process.

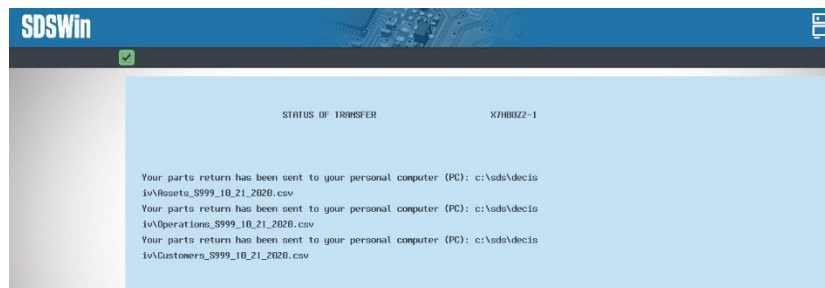


The three templates will be generated and saved on the user PC in the following order: Assets, Operations and Customers.

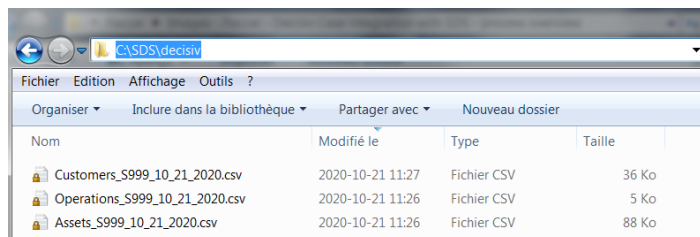




The Status of Transfer screen will display after all three templates have been generated.



The three CSV files are saved in the folder on the user PC that is set up in SDS:



Note that the three data files generated and exported to the user PC are CSV format (Comma-Separated Values). CSV files can be opened with Excel for viewing and modifying the data. If you need to modify data, however, it is best to update in SDS rather than in Excel if you wish to make the changes permanent. These templates can be exported to CSV files anytime it is necessary (for example, after modifying the data in SDS).

Decisiv Data Load

Once the reviewed data is correct, you can send the CSV files to the Decisiv team for data loading. This will make SDS data available on Decisiv when you are working with Cases.

Decisiv Open Case And Export Case To SDS Repair Order

Open Case data can be sent to SDS to create or update a Repair Order.

Open Case

When opening a new Case in Decisiv, you can search assets and customers previously uploaded from the SDS database. You will also be able to add the previously uploaded service Operations to the Case.

View Credit Check Customer Info

During the Open Case process, the Credit Check feature will allow you to view the customer credit info from SDS under the Customer Info in Decisiv:

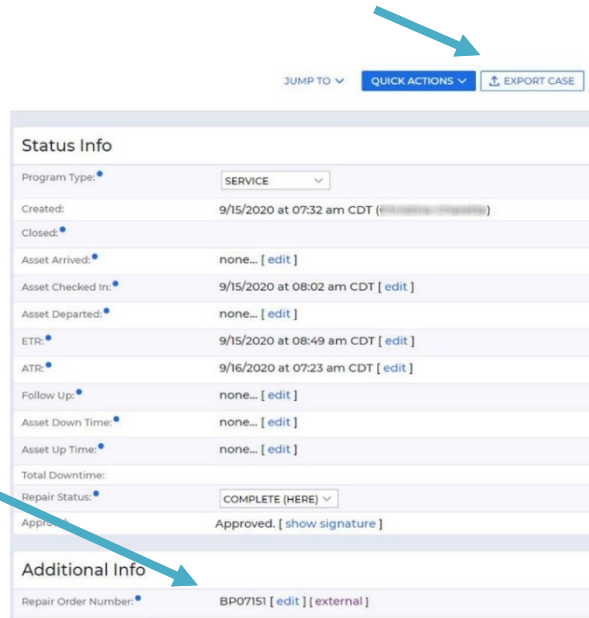
Customer Info	
Company:	I Pre Delivery Inspection - Cust#: PDI
Address:	17700 1st Street Bakersfield, CA 93311
Phone:	805-331-1111
Credit Limit:	\$20,000.00
Credit Available:	\$20,000.00
Memo Balance:	\$0.00
AR Terms:	60 days
PO Required:	Yes
Customer Profile:	

To enable the Credit Check function, it must first be enabled on Decisiv and configured in SDS.

Export Case to Repair Order

When you are ready to send the Case to SDS, use the "Export Case" button.

SDS will create a new Repair Order, print the Repair Order on the service printer (if the AutoPrint function is enabled in SDS) and return the Repair Order number to Decisiv to sync it with the open Case.



JUMP TO ▾ QUICK ACTIONS ▾ EXPORT CASE

Status Info	
Program Type:	SERVICE ▾
Created:	9/15/2020 at 07:32 am CDT (edit)
Closed:	
Asset Arrived:	none... [edit]
Asset Checked In:	9/15/2020 at 08:02 am CDT [edit]
Asset Departed:	none... [edit]
ETR:	9/15/2020 at 08:49 am CDT [edit]
ATR:	9/16/2020 at 07:23 am CDT [edit]
Follow Up:	none... [edit]
Asset Down Time:	none... [edit]
Asset Up Time:	none... [edit]
Total Downtime:	
Repair Status:	COMPLETE (HERE) ▾
Approved:	Approved. [show signature]
Additional Info	
Repair Order Number:	BP07151 [edit] [external]

SDS – Repair Order Create And Update

Once you have used the Export Case in Decisiv and the SDS Repair Order number has displayed, you can access the SDS Repair Order to begin working on it.

It is possible to configure SDS to automatically print Repair Orders when a Decisiv Case has been received. Please contact the SDS Support team if you need this feature activated.

Once the SDS Repair Order is populated in the open Case on Decisiv, updates (like adding a new job item) can be synced back to the SDS Repair Order by using the "Export Case" button. Updates can be sent to SDS whenever needed as long as the Repair Order is open..

Case Integration In SDS Repair Order

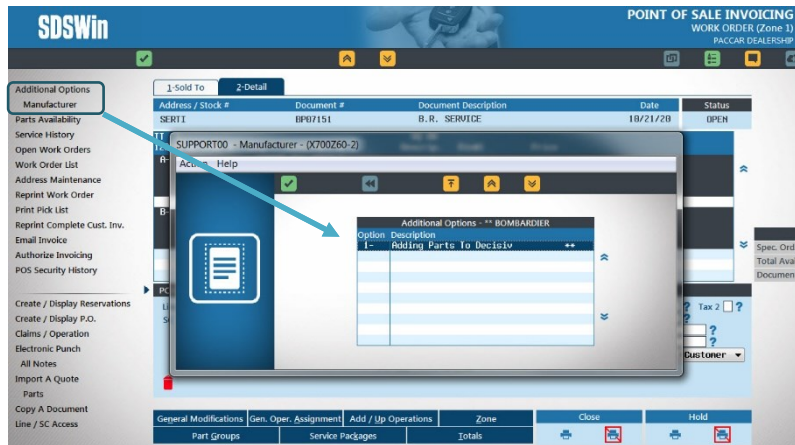
Document data sent from Decisiv to SDS is available on the corresponding SDS Repair Order in Point Of Sale. Comments, parts, labor and hours received are available for each operation. The parts can be imported into the Repair Order using the Parts Availability / Service Estimate option. From Parts Availability, a user can reserve, order or invoice the parts.

For more information on this process, please consult the document "Paccar - Decisiv Case to SDS Repair Orders.pdf."

SDS – PushParts To Decisiv

To use the Push Parts functionality, it must first be enabled on Decisiv and configured in SDS.

The SDS Push Parts option can be used to sync parts added to the SDS Repair Order with the Open Case on Decisiv. From the SDS Repair Order, simply click on the "Manufacturer" button and the "Adding Parts To Decisiv" link on the next screen.



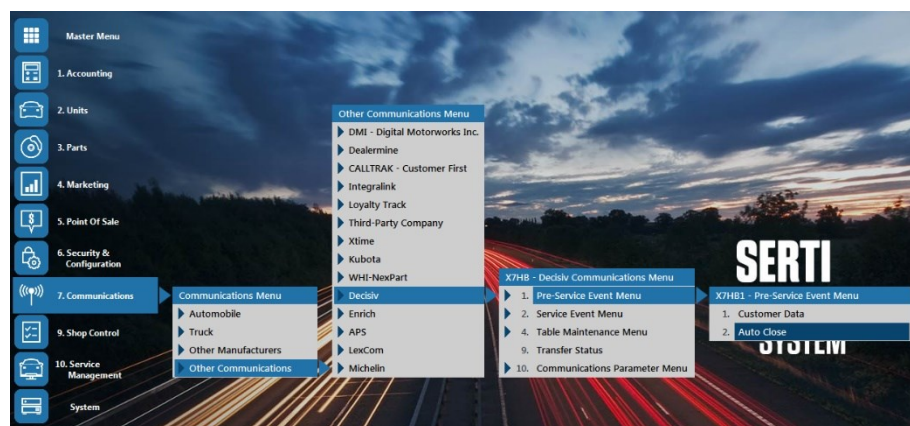
This option can be used at any time. It should at least be executed after you have invoiced all the parts and before you close the SDS document if you wish to include all the parts on the Decisiv Case.

SDS Auto Close Decisiv Opened Cases

The Auto Close option must first be enabled on Decisiv if you wish to use it.

The Auto Close option in SDS sends all Repair Orders closed and posted since the last Auto Close transfer to Decisiv in order to close the corresponding Cases. It can be used on user demand or it can be scheduled to run automatically on a daily basis.

The SDS Auto Close request can be found at the "X7HB1-2. Auto Close" option.



The "Transfer And Auto Close Immediately" button can be used to send the request interactively. The "Add This Job To Schedule" button can be used to schedule the Auto Close to run automatically every day.

