

# Dealer Management System (DMS) Integrations



Gain efficiencies by interfacing Pulse Pro with your existing DMS. Provides billing and workflow improvements by automatically sharing fluid dispense records.

## Features and Benefits

- **Ease of use** – Interface is invisible to the technician
- **Security** – Validates that a work order exists within DMS before oil is dispensed
- **Automation** – Ensures that all dispenses are billed
- **Detailed reporting** – Each job performed is recorded with information returned to DMS

## How It Works

The interface to a business system or DMS provides two important basic functions:



For the most up-to-date list of available DMS integrations, please visit [www.graco.com/pulsedms](http://www.graco.com/pulsedms).

## Steps to Integrate Your Pulse Pro System with a DMS

Pulse Pro supports many major DMS software systems including CDK Global (Drive), Dealertrack (Opentrack), Reynolds and Reynolds (ERA/Power), PBS, AssetWorks (FA/M5 Fluid Focus), Procede (Excede) and more. Visit [www.graco.com/pulsedms](http://www.graco.com/pulsedms) for the latest list. If your DMS is not listed, please contact [pulse@graco.com](mailto:pulse@graco.com) to receive information about how you can develop an integration yourself using our third-party API (application program interface.)

### If your DMS has a direct integration, please follow these steps:

1. Visit [dms.gracopulse.com](http://dms.gracopulse.com) and create an account. Once logged in, you can choose your region and DMS.
2. Review and complete the DMS integration contract which includes terms and conditions along with pricing for applicable fees.
3. At the time of activation, you will be billed the one-time activation fee and e-mailed the next steps including any documentation required by the selected DMS to complete.
4. Once the integration is ready, you will receive a final integration confirmation along with instructions for activating the interface within the Pulse software.
5. If applicable, your monthly fee will begin after your first month of use.

# CDK DMS F.A.Q.

## What is the activation fee pricing?

Activation fees are a one-time fee paid for new DMS integration accounts, the fee pricing varies based on the specific DMS partner. To find specific pricing for each DMS please reach out to your local Graco distributor or Graco representative.

## How can I pay the activation fee?

A one-time activation fee can be paid directly to Graco through [www.dms.gracopulse.com](http://www.dms.gracopulse.com) or an activation code can be purchased through a local Graco distributor. Both options will require creating a Pulse integration account at [www.dms.gracopulse.com](http://www.dms.gracopulse.com), agreeing to terms and conditions and using a major credit card for fees.

## What is the monthly pricing?

A monthly integration fee is paid directly to Graco through [www.dms.gracopulse.com](http://www.dms.gracopulse.com) and will require a major credit card. Fee pricing varies based on the specific DMS partner, for specific pricing please contact your local Graco distributor or Graco representative. The first billing will occur when the activation setup email is sent by Graco and will occur monthly thereafter.

## What is the cancellation process?

Cancellation of the interface can be done at [dms.gracopulse.com](http://dms.gracopulse.com) through the Pulse integration account. See the interface agreement for additional details.

## Who do I contact with issues?

Support is available via email at [pulse@graco.com](mailto:pulse@graco.com) or by calling LED Tech Assistance at 800-533-9655, option 4.

## What is communicated between Pulse and the DMS?

Dispense data, dispense authorization and posting messages are sent between the systems, including WO #, fluid p/n, fluid quantity and, optionally, fluid price, oil filter and other dispense-related items.

## Where is the dispense information sent?

It is sent to the local Pulse Hub and CDK's API service via the Graco server.

## Which versions are supported?

CDK Drive

## What validation rules are used for a work order (WO)?

Before a dispense, Pulse verifies that the WO number is valid and open for posting within the CDK system.

## What about non-fluid parts?

Pulse supports sending non-fluid part numbers to CDK when the WO is entered through the Pulse software. Non-fluid parts cannot be added through the meter.

## Does this integration manage pricing?

Yes, Pulse is able to manage pricing through the software. Pricing can be managed based on time of day and/or fluid quantity dispensed.

## What is the difference between fluids managed as a part versus as a service?

For fluids managed as a part, CDK allows only whole units of a fluid. This whole unit can represent a fraction of a unit – for example, one part number unit can be 1/10 quart. Fluids managed as a service can be recorded as an exact fluid quantity.

## How is it rounded?

Pulse contains rounding rules that allow the dispense quantity entered into CDK to be rounded up or down to the nearest unit.

## Where does it go in the WO?

For dispenses where the line is not entered into Pulse, the dispense will be posted to the first available line; otherwise, the line can be entered into Pulse.

## What needs to be entered to make a dispense in Pulse?

The WO number is required. The line number and technician ID are optional. The WO must be in CDK and open for charges.

## What happens if the interface goes down?

The interface requires an internet connection to function. On the rare occasions that the interface has issues on either the Pulse or CDK side, the interface can be turned off and fluid dispenses can be manually billed. Please note that these will not be automatically recorded in CDK.

## What happens with failure to post?

The integration will create a notification and attempt to post again. Pulse software allows configurable repost attempts and times.