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:

1 WORK ORDER VALIDATION

With DMS integration, dispenses occur only when a valid work order exists.

Work Order or Technician PIN → **DMS**
Authorization to Dispense ←

2 WORK ORDER POSTING

Pulse software posts the fluid dispense to the work order in the DMS.

Post Dispense → **DMS**
Confirm Posting ←

CDK Global · Dealertrack · procede software · PBS · Reynolds & Reynolds

For the most up-to-date list of available DMS integrations, please visit 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** for the latest list. If your DMS is not listed, please contact 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** 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.

Procede 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 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, 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 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 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 or by calling LED Tech Assistance at 800-533-9655, option 4.

What is communicated between Pulse and the DMS?
Only basic dispense data is sent between the systems, including Technician ID, Fluid P/N and Fluid Quantity.

Where is the dispense information sent?
Excede API service via the Graco server

Which versions are supported?
Excede V9.22 or newer

What validation rules are used for a work order (WO)?
Pulse has three levels of verification based on the security level chosen:

- Level 1 – Pulse verifies before a dispense that the WO number is valid within the Excede system and is open for posting.
- Level 2 – Pulse verifies before a dispense that the WO number and the fluid being requested are valid within the Excede system and are open for posting.
- Level 3 – Pulse verifies before a dispense that the WO number and the fluid being requested are valid within the Excede system and are open for posting, and restricts the dispense quantity to that defined on the WO.

What about non-fluid parts?
Pulse supports only fluids dispensed through the meters.

Does this integration manage pricing?
Pricing is managed in Excede.

How is it rounded?
Rounding is controlled in Excede and rounds to the nearest 0.1 (tenth).

Where does it go in the WO?
Depending on your security settings, the fluid dispense will be posted to a new line or the line the technician is punched into in Excede.

What needs to be entered to make a dispense in Pulse?
Technician ID is the only thing entered into Pulse.

What needs to be entered into Excede to make a dispense?
The technician needs to be clocked into the job. If level 2 or 3 is used for validation, the part must be pre-loaded to the ticket.

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 Excede side, the interface can be turned off and fluid dispenses can be manually billed. Please note that these will not be automatically recorded in Excede.

What happens with failure to post?
The integration will create a notification and attempt to post again. The Pulse software allows configurable repost attempts and times.

Contact us today!
Call **800-533-9655** to speak with a Graco representative, or visit **www.graco.com** for more information.

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