

# Dealer Confirmation Checklist

Dealer Name: \_\_\_\_\_

Dealer ID: \_\_\_\_\_

By default, when a location is upgraded to Version UJ050B, all features will be **TURNED ON** unless otherwise noted before the upgrade. Use this checklist to review and confirm all the features the dealer location wants enabled on the Decisiv SRM Platform as part of the upgrade.

Please note feature 7, 8 and 9 are automatically enabled with the upgrade.

Feature	Description	Enable?
<b>1. DMS Tax &amp; Misc. Fee Calculation (from CDK)</b>	Gives users the ability to call the DMS from within Decisiv and return taxes, shop supplies, and hazardous material based on the parts and labor added to the case in Decisiv as well as capture this information prior to creating a RO in the DMS.	Yes  No
<b>2. Customer Credit Status</b>	Gives Decisiv the ability to obtain the following Customer Credit details from the DMS and view it in the Customer Info section of a case in Decisiv: <ul style="list-style-type: none"> <li>• Credit Limit</li> <li>• Available Credit</li> </ul>	Yes  No
<b>3. Customer Add</b>	Gives Decisiv the ability to add a customer record from Decisiv to the DMS.  <b>NOTE:</b> This integration does not include adding an asset to the DMS along with the customer record.	Yes  No
<b>4. Parts Pre-Assigned/Sold to the RO on the DMS sent to Decisiv</b>	If there are Parts Pre-Assigned/Sold to the RO in the DMS, this gives users the ability to update the case in Decisiv and add those parts to the case.  If parts are removed from the RO in the DMS, this gives users the ability to update the Decisiv case by removing those parts from the case.	Yes  No

Feature	Description	Enable?
<b>5. Parts Search</b>	Gives users the ability to search the DMS for a part by entering part of the Part # or Description and add it to a case in Decisiv.	Yes No
<b>6. Switch/Replace Customer on RO</b>	Gives users the ability to change the customer name on the RO to a Bill To customer and bill them instead of the asset owner. <b>NOTE:</b> Changing the customer on the RO will reprice labor, list the Bill To customer on the RO, and print the Bill To information on the Service Invoice without having to change ownership of the vehicle.	Yes No
<b>7. Update hours sold in Decisiv and export to DMS RO</b>	Gives users the ability to update Sold Hours (Labor time) on a case in Decisiv and export those changes to the RO in the DMS.	Automatically enabled with upgrade.
<b>8. Update description of operations</b>	Gives users the ability to update the description of an operation on a case in Decisiv and export those changes to the RO in the DMS.	Automatically enabled with upgrade.
<b>9. Update Labor Type</b>	Gives users the ability to update the Labor Type on a case in Decisiv and export those changes to the RO in the DMS.	Automatically enabled with upgrade.

Confirmed by:

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Signature

Name: \_\_\_\_\_

Designation: \_\_\_\_\_

Date: \_\_\_\_\_