

How to Activate a Tekion Integration

- Step 1. Open a web browser and navigate to <u>dms.gracopulse.com</u>.
- Step 2. If you do not already have an integration account, click the <u>Create an Account</u> button. Otherwise, log in and continue to Step 5.

Quick Tip – If you need to create an account, it is recommended that the individual who manages the day-to-day operation with the Pulse system (often a parts or service manager) be the one to create the account. The account holder receives all subscription related email notices, including: system setup instructions, activation or recurring payment confirmations, as well as schedule maintenance or down-time alerts. If you would like other users copied on these notifications, please email <u>pulse@graco.com</u> with your request.

- Step 3. Check your email then follow the link to set your password and activate the account.
- Step 4. Return to <u>dms.gracopulse.com</u> and log into your newly created account.
- Step 5. Click the <u>Add Integration</u> button on the upper right side of the page.
- **Step 6.** Select your region, and then locate the Third Party Interface (Graco's API) tile. On this tile, select 'Subscribe'.
- **Step 7.** Enter the dealership's site information and then click 'Subscribe'. Once your information is verified, you will receive a confirmation that your subscription was successfully created.
- **Step 8.** Check your email for subscription confirmation. <u>You may disregard the email with subject 'Third</u> Party Interface Credential Request'.

Instead, please sign and send this <u>Data Authorization Form</u> to <u>pulse@graco.com</u>.

Once completed with the steps above, Graco and Tekion will work together to enable the integration. This may take several days. Once the integration is ready to be activated, you will receive an email with subject 'Third Party Interface Customer Setup Guide. At this point you can follow the linked instructions to enable the integration in your Pulse Pro system.





Quick Tips

> When 'Configuring Your Interface Settings':

- Rounding needs to be enabled.
- Work Order Validation needs to be enabled.

> When 'Configuring the Code Element'

- 'Use Code' needs to be enabled.
- 'At the end' should be selected for 'Place in the WO number'.
- 'None' should be selected for 'Separator'.
- 'Number of Symbols' should be set to 3 (or more).
 - To add parts to a specific operation, the job code needs to be entered in the format of: {Job Code} - {Operation Number}.
 - **Example:** If you wanted to dispense to repair order 12345, on job 'B', operation 3, you would enter 12345B-3 at the dispense meter.
- 'Required' box should be checked.

> When 'Configuring Your Data Elements'

- Fluid ID must be configured to match the part number of the fluid from Tekion inventory management.
- Meter Units must be configured to match the units of the part in Tekion inventory management.



