

## Fusion / Decisiv Case Management Reference

### DATA LOADING

Feature Name	Definition	Data Direction	Dealer Confirmation
Customer Data - Initial Load	This capability allows the DBS customers information to be imported into the DECISIV CASE MANAGEMENT platform.	Into DECISIV CASE MANAGEMENT	Yes
Asset/VIN Data - Initial Load	This capability allows the DBS unit file to be imported into the DECISIV CASE MANAGEMENT platform.	Into DECISIV CASE MANAGEMENT	Yes
Operations Data (Repair SRT) - Initial Load	This capability allows the DBS repair operation codes (SRTs) to be imported into the DECISIV CASE MANAGEMENT platform.	Into DECISIV CASE MANAGEMENT	Yes

### NEW EVENT/CHECK-IN

Feature Name	Definition	Data Direction	Dealer Confirmation
Case Creation	This capability allows the DECISIV CASE MANAGEMENT user to find customer, add asset info, and create a new DECISIV CASE MANAGEMENT case.	DECISIV CASE MANAGEMENT	Yes
Customer Credit Check	This capability automatically queries the DBS for the customer's credit status. The DBS returns the customer's credit limit, available credit, and whether the customer requires a PO for purchases.	DBS to DECISIV CASE MANAGEMENT	Yes
Add Customer	This capability allows for a new customer to be added to the DBS when a case is created or an asset is checked in.	DECISIV CASE MANAGEMENT to DBS	Yes
Add Asset	This capability allows for a new asset to be added to the DBS when a case is created or an asset is checked in.	DECISIV CASE MANAGEMENT to DBS	Yes – Case Create

### ESTIMATE MANAGEMENT

Feature Name	Definition	Data Direction	Dealer Confirmation
Add Operations	This capability allows the user to add operations to a DECISIV CASE MANAGEMENT case. The user has the ability to search and add both pre-loaded and "custom" Operations.	DECISIV CASE MANAGEMENT	Yes
Add Labor and Parts to Operation	This capability allows the user to add labor elements and parts elements to the operations in a DECISIV CASE MANAGEMENT case.	DECISIV CASE MANAGEMENT	Yes
Flag Repair Tasks as Warranty	This capability allows the DBS to capture the value of the warranty tag from a DECISIV CASE MANAGEMENT case, to set the repair order task to warranty.	DECISIV CASE MANAGEMENT to DBS	Yes

### PARTS MANAGEMENT

Feature Name	Definition	Data Direction	Dealer Confirmation
Basic Parts, Pricing & Availability (PP&A)	This capability allows DECISIV CASE MANAGEMENT to query the DBS for valid parts, the availability of a part at their location, as well as provide the customer specific parts pricing in the DECISIV CASE MANAGEMENT estimate.	DBS to DECISIV CASE MANAGEMENT	Yes
Out-of-Stock Parts	This capability provides the DECISIV CASE MANAGEMENT user with thumbs up/thumbs down indication of parts availability from inventory.	DBS to DECISIV CASE MANAGEMENT	Yes
Relief of Inventory	This capability controls how the relief of inventory is handled in the DBS when the RO is created. <i>Note: Fusion can add parts to an Operation with an action of Quote (Sept 2017)</i>	DBS	Yes
Superseded Parts	This capability provides for superseded or overriding part numbers to be returned if the entered part number has been superseded or overridden.	DBS to DECISIV CASE MANAGEMENT	TBD

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Parts with a Core	This capability allows the DECISIV CASE MANAGEMENT case to support parts with Core fees.	DBS to DECISIV CASE MANAGEMENT	Yes
Forced Part Number	This capability allows the user to "force" a part number onto the DECISIV CASE MANAGEMENT case that does not exist in the DBS; then exporting the case to the RO.	DECISIV CASE MANAGEMENT to DBS	Yes
Part Source or Vendor	This capability allows the DECISIV CASE MANAGEMENT user to specify the Mfr/Source when entering a part if that part is inventoried from more than one Supplier.	DBS to DECISIV CASE MANAGEMENT	Yes
Back-counter Pricing	This capability provides the ability to set integration option to have PP&A always return customer's back counter pricing (Shop Price). <i>Note: Customer pricing is set within DBS.</i>	DBS to DECISIV CASE MANAGEMENT	Yes

### REPAIR ORDER OPERATIONS

Feature Name	Definition	Data Direction	Dealer Confirmation
Update Customer Info	This capability supports that the DBS customer record data is NOT updated in the DBS when a case is exported.	DECISIV CASE MANAGEMENT to DBS	No
Track Parts Sales by Salesman	This capability allows the DECISIV CASE MANAGEMENT user to enter the appropriate parts salesman ID when adding parts to the case and exports that ID to the DBS RO for Parts Salesman Commission tracking.	DECISIV CASE MANAGEMENT to DBS	Yes
Engine hours	This capability sends the engine hours captured in the DECISIV CASE MANAGEMENT case to the DBS.	DECISIV CASE MANAGEMENT to DBS	Yes

### EXPORT TO DBS

Feature Name	Definition	Data Direction	Dealer Confirmation
Export Case	This capability allows the user to create a DECISIV CASE MANAGEMENT case and export the case to create an RO in the DBS. <i>Note: Specifics determined by configuration settings in Karmak. See Karmak documentation.</i>	DECISIV CASE MANAGEMENT to DBS	Yes
Return RO Number	This capability returns the RO number from the DBS and populates the RO Number field in the DECISIV CASE MANAGEMENT case.	DBS to DECISIV CASE MANAGEMENT	Yes
CCC Capture - Case and Operations	This capability captures the Complaint, Cause, Correction from the DECISIV CASE MANAGEMENT case at the Case level and note that information in the RO. This capability captures the Complaint, Cause, Correction from the DECISIV CASE MANAGEMENT case at the Operation Level and note that information in the RO. <i>Note: This is a setup option.</i>	DECISIV CASE MANAGEMENT to DBS	Yes

### REPAIR ORDER UPDATES

Feature Name	Definition	Data Direction	Dealer Confirmation
Export Update to RO	This capability allows the DECISIV CASE MANAGEMENT user to add additional segments to the DECISIV CASE MANAGEMENT case and by exporting the case again have those additional segments added to the DBS RO. This capability also allows the DECISIV CASE MANAGEMENT user to add parts to an existing job segment and by exporting the case again have those parts added to the respective segment in the DBS.	DECISIV CASE MANAGEMENT to DBS	Yes

*The information in the document was compiled by OEM Partner's and Decisiv with assistance from Karmak.*

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### CLOSE CASE

Feature Name	Definition	Data Direction	Dealer Confirmation
Close RO Notifies DECISIV CASE MANAGEMENT to Close Case	This capability will auto close the DECISIV CASE MANAGEMENT case when the last invoice is processed against an RO that was created via a DECISIV CASE MANAGEMENT case export.	DBS to DECISIV CASE MANAGEMENT	Close RO Notifies DECISIV CASE MANAGEMENT to Close Case
Return Invoice Info	This capability allows the DBS to update the DECISIV CASE MANAGEMENT case with the invoice date, invoice number, and invoice.	DBS to DECISIV CASE MANAGEMENT	Return Invoice Info
CCC - Case Level	This capability allows the DBS to update the DECISIV CASE MANAGEMENT case with the complaint, cause and correction at the case level.	DBS to DECISIV CASE MANAGEMENT	CCC - Case Level
CCC - Operation Level	This capability allows the DBS to update the DECISIV CASE MANAGEMENT case with the complaint, cause and correction at the operation level.	DBS to DECISIV CASE MANAGEMENT	CCC - Operation Level