

- Start a Visit
- Service Appointments
 - Repair Orders
 - Labor Op Codes
 - Discounts and Fees



Over VUE

VUE is integrating with GM to send and receive Service Appointment and Repair Order data between VUE and GM Service Workbench.

Settings

Navigate to OEM DCS > GM > GM Setups > Integrations Tab

1. In the RO Sync section, setting a feature to **Yes** enables that function. For all the RO Sync features to work properly, all settings should be toggled to **Yes** except **Suppress Status Updates from VUE**, which should be set to **No**. Click the **[Save]** button in the Action Ribbon to commit your changes. The settings are:

- Retrieve Appointments – Allows users to view and start a visit from Service Appointments within GM Service Workbench.
- Search Customer - Allows users to search for existing VUE customers from within GM Service Workbench.
- Create Customer - Allows users to create a new customer record in VUE via Workbench,
- Update Customer – Allows changes to a customer record in VUE via Workbench.
- Create RO – Allows GM Service Workbench to create repair orders in VUE.
- Update RO - Allows GM Service Workbench and VUE to sync changes to repair orders.
- In addition to these features you can also Suppress Updates from VUE, though it is recommended that this option be set to 'No' when having any of the RO Sync Features enabled.

RO Sync	
Retrieve Appointments	Yes
Search Customer	Yes
Create Customer	Yes
Update Customer	Yes
Create RO	Yes
Update RO	Yes
Suppress Status Updates from Vue	No

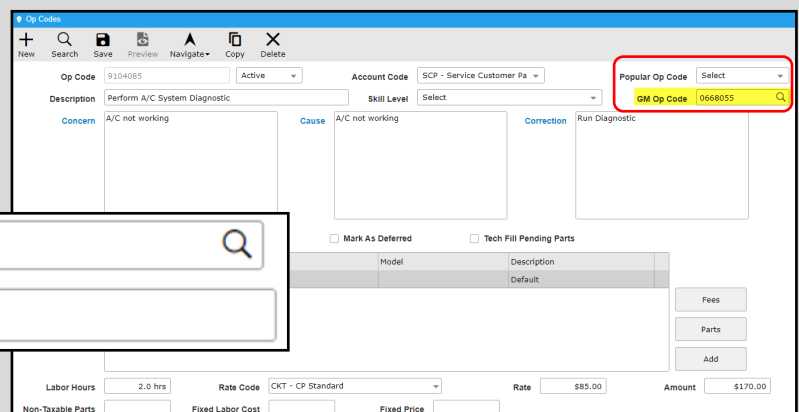
OP Code Set ups

To auto populate, both the Dealer Defined Op Codes and the GM Labor Codes, link the Op Codes during setups:

Navigate to Service > Maintenance > Op Codes.

1. Filter/ sort and select the Labor Op Code.
2. Search for the GM Labor Op Code in the provided field.
3. Click the **[Save]** button.

Op Code	9104085	<input type="text"/>
GM Op Code	0668055	<input type="text"/>



Discounts & Fees

GM Service Workbench has one level discounts for Operation Fees, Parts, Labor, and then one for the RO header. Since VUE can accommodate multiple for each operation as well as header level, it is important that the Fees are mapped from Workbench to VUE correctly. Otherwise, the totals will not match between the two systems.

- To send and receive Discounts and Fees via RO Sync, a default fee account must be specified in VUE for each one. There are discounts and fees that apply to both the overall RO or individual operations.
 - Default Misc Fees - Shop supplies fees (Applies fees to entire RO).
 - Discount Fees - General discount to an individual operation.
 - Parts Discount - Parts discount to an individual operation.
 - Labor Discount - Labor discount to an individual operation.
 - Ticket Level Discount - Overall discount applied to entire RO.
- To configure the Fees and Discounts, navigate to OEM DCS > GM > GM Setups > Integrations tab. Input the default Fees and Discounts to be used with each type. Click the **[Save]** button.

Default Misc Fees	GMSHOP	
Discount Fees	I-SADJ	
Parts Discount	I-PADJ	
Labor Discount	I-LADJ	
Ticket Level Discount	DHF	

Default Misc Fees

To create a new Default Misc Fee, navigate to Service > Maintenance > Fees and click the **[New]** button from the Action Ribbon. Setup the fee similar to Shop Supplies Fee.

Fee Code	GMSHOP	Fee Type	Charge	Status	Active
Description	GM Shop Supplies Fee				
Fee Type Class	Shop Supplies	Account Number	<input type="text"/>		
Based On	Labor,Parts	Effective Date	11/17/2022	Replace	<input type="text"/>
Applies To	Customer Pay	Service RO Fee	Yes	Parts Invoice Fee	No
Amount	\$0.00	Percentage	9.00%	RO Level	Ticket
Fee Minimum	\$2.50	Maximum	\$50.00	Department	All
Spend Minimum	\$39.95	Maximum	\$0.00	Paid By	Customer Pay
User Override	Yes, Any User				
Shop Charge	Yes				
Subtotal Per Line	No				
Default On Pay Type	Customer Pay				

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Discount Fees

This is a discount that applies to the entire Operation and corresponds to the GM Service Discount. Navigate to Service > Maintenance > Fees and click the [**New**] button in the Action Ribbon.

Setup the Discounts as follows:

- **Fee Code** - I-SADJ (Dealership defined)
- **Fee Type** - Discount
- **Description** - Internal Service Adjustment (Dealership specific)
- **Based On** - Parts and Labor Subtotal - **Note:** this is a newly created Based On type to accommodate the way that GM calculates its Service Discount, it is similar to the 'Ticket' Based on type with the exception that it takes into account the totals of the parts discount and labor discount and subtracts that from the parts and labor totals before calculating its amount.
- **Applies To** - Customer Pay (Select Pay Type)
- **Amount** - \$0.00 (Dealership specific)
- **Fee Minimum** - \$0.00 (Decision is up to the User)
- **Spend Minimum** - \$0.00 (Dealership specific)
- **Percentage** - 0.00% (Dealership specific)
- **Fee Maximum** - \$0.00 (Dealership specific)
- **Spend Maximum** - \$0.00 (Dealership specific)
- **User Override** - Select Yes, Any User (if using Percentage, select Yes, Any User, or Yes, with permission. If Base Dollar Amount is used, then the user can select No)
- **Status** - Active
- **Account Number** - (Dealership specific)
- **Effective Date** - (Dealership specific)
- **Service RO Fee** - Yes
- **RO Level** - Operation
- **Department** - All (Dealership specific)
- **Paid By** - Customer pay (Dealership specific)
- **Default On Pay Type** - Customer Pay (Dealership specific)
- **Parts Invoice Fee** - Yes (Dealership specific)
- **Default On Parts Invoice** - No (Dealership specific)

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Parts and Labor Discount

This is a discount that applies to Parts or Labor for an individual operation and corresponds to the GM Parts or Labor Discounts. Fill in the information the same as Discount Fees above, with the exception, that the Fee Code and Description are specific to the dealership, and the 'Based On' field is set to either Parts or Labor.

The screenshot shows the 'Fees' form with the following fields and values:

- Fee Code: I-PADJ
- Fee Type: Discount
- Status: Active
- Description: Internal Parts Adjustment
- Account Number: 6470
- Fee Type Class: Discount/Coupon
- Effective Date: 01/01/2018
- Replace: [Search]
- Based On: Parts (highlighted in yellow)
- Service RO Fee: Yes
- Parts Invoice Fee: Yes
- Applies To: Customer Pay
- RO Level: Operation
- Default On Parts Invoice: No
- Amount: \$0.00
- Percentage: 0.00%
- User Override: Yes, Any User
- Department: All
- Paid By: Customer Pay
- Fee Minimum: \$0.00
- Maximum: \$0.00
- Spend Minimum: \$0.00
- Maximum: \$0.00
- Default On Pay Type: Customer Pay

Ticket Level Discount

RO level Discounts correspond to the GM Labor Discount. Fill in the information the same as Discount Fees discount, with the exception, that the Fee Code, Description, and Default on Pay Type fields are specific to the dealership, the 'RO Level' field is set to 'Ticket,' and the 'Subtotal Per Line' is set to 'No.'

The screenshot shows the 'Fees' form with the following fields and values:

- Fee Code: DHF
- Fee Type: Discount
- Status: Active
- Description: Discount Header Fee
- Account Number: [Search]
- Fee Type Class: Discount/Coupon
- Effective Date: 10/03/2022
- Replace: [Search]
- Based On: Parts and Labor Subtotal
- Service RO Fee: Yes
- Parts Invoice Fee: Yes
- Applies To: Customer Pay
- RO Level: Ticket (highlighted in red)
- Default On Parts Invoice: No
- Amount: \$0.00
- Percentage: 0.00%
- User Override: Yes, Any User
- Department: All
- Paid By: Customer Pay
- Fee Minimum: \$0.00
- Maximum: \$0.00
- Spend Minimum: \$0.00
- Maximum: \$0.00
- Subtotal Per Line: No (highlighted in red)
- Default On Pay Type: Customer Pay

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Using Discounts and Fees in VUE

Note: Create Discounts and Fees prior to selecting them in GM Service Workbench.

Operation/Line Item level Discount

Navigate to Service > Advisor > Repair Orders

1. Filter/Sort and select the RO.
2. Open the details of an operation and go to the discounts tab to see the available discounts.

Operation Detail

Repair Order: 175911 Operation: < A > Advisor: John Hardacre Customer: Fitzgerald, Gordon

VIN: 1GCUYEET1NZ161535 2022 Chevrolet Silverado 1500 LTD Mileage: 206785

Concern: A/C not working

Code	Description	Base Amount	Percent	Tax	Total Amount	
I-PADJ	Internal Parts Adjustment	\$15.00	0.00%	<input type="checkbox"/>	\$0.00	X
I-SADJ	Internal Service Adjustment	\$0.00	20.00%	<input type="checkbox"/>	\$32.00	X
I-LADJ	Internal Labor Adjustment	\$10.00	0.00%	<input type="checkbox"/>	\$10.00	X

Sublets: Add Discount

Charges: Total: \$0.00

Discount: Total: **\$42.00**

Ticket Level Discounts

Navigate to Service > Advisor > Repair Orders.

Filter/Sort and select the RO.

1. Click on the Discounts or Charges hyperlink to edit and make a selection. Note that to edit, the 'User Override' in the Fees screen must be set to 'Yes, Any User' or With Permission at Service > Maintenance > Fees.

Repair Orders

RO #: 175911 Hat #: Customer: 101337 Fitzgerald, Gordon

VIN: 1GCUYEET1NZ161535 Address: 76521 Lakewood Blvd

Vehicle: 2022 Chevrolet Silverado 1500 Limi Zip: 75216 City: DALLAS

Color: Select License Plate: X0W54S Phone: (816) 882-1475 Email: gordon.fitz@nomail.com

Stock #: In Service Date: 11/29/2022 Loyalty #:

Miles In: 206785 Override: Miles Out:

Arrived: 12/08/2022 Time: 12:19 PM Department: Service Estimate: \$0.00

Promised: 12/09/2022

Delivered:

Closed:

OP: Op Code Concur:

Charges: \$33.16 Discounts: \$15.30 Taxes:

Discounts

Code	Description	Base Amount	Percent	Tax	Total Amount	
DHF	Discount Header Fee	\$0.00	9.00%	<input type="checkbox"/>	\$15.30	X

Add OK Cancel

User Override: Yes, Any User

Note that if a percentage is used, VUE will send the dollar amount to Service Workbench to insure accuracy.

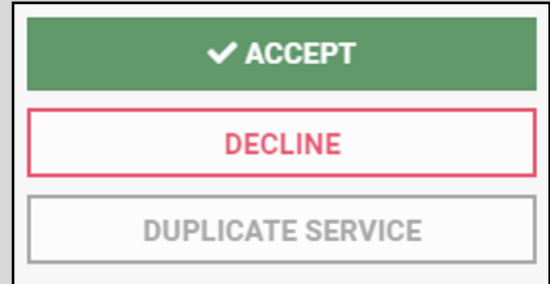
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Create an RO via [Start New Visit] or [Create Appointment] in GM Service Workbench

Navigate to GM Service Workbench

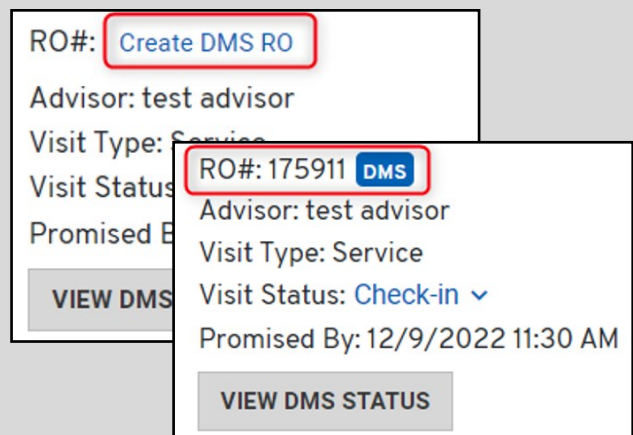
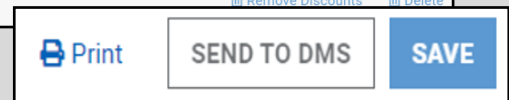
1. Click on the **[Start New Visit]** button.
2. Select a Customer, Vehicle, and Appointment (where applicable).
3. Input current odometer reading and any other required fields (marked with a red asterisk).
4. Click the **[Start Visit]** button.
5. Complete Dashboard, Menu, and MPVI.
6. Click the Line Items tab.
7. Click the [Add a Line item](#) link to open the Edit Line Item window.
8. Filter/ search and select Line Items.
9. For each Line Item, update any items as needed (Op Codes, Labor Hours, Discounts, etc.).



Title	Op Code	Dealer Op Code	Parts Status	Labor Hours *	Labor Price *	Parts Price *	Sub Total
Diagnostic - Brake system	0668080	0668080		1	\$47.50	\$0.00	\$38.00
		Labor Discount		Parts Discount		Discount	
		20 %		0 %		15 %	
		Labor Total		Parts Total		Total	
		\$38.00		\$0.00		\$32.30	

[Edit](#) [Add Media](#) [Remove Discounts](#) [Delete](#)

10. Click the **[SAVE]** button.
11. If the RO already exists in VUE, click the **[Send To DMS]** button to upload the Line Items to VUE.
 - If the RO doesn't exist in VUE, click the **Create DMS RO** link in the upper left of the screen to create the RO in VUE. Once created, the VUE RO number replaces the Create DMS RO link in Workbench.



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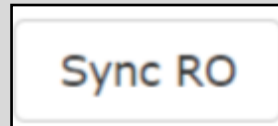
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Syncing RO data to update GM Workbench

Navigate to Service > Advisor > RO

1. Filter/ search and select an RO.
2. Open the operation to view the Operations Detail window.
3. The GM Tab will be flagged in red if labor hours are missing on this operation.
4. To Manually enter Op Codes:
 - Navigate to Service > Advisor > Repair Order.
 - Open the Operations Details.
 - On the GM tab, allocate Labor Hours to match the hours on the Labor tab.
5. Clicking the **[Sync RO]** button updates the following fields on all operations in that RO:
6. Refresh the Workbench page to see the updates.

The screenshot shows the 'Labor' tab in the GM Workbench. On the left, there are summary sections for LABOR (Total: \$170.00), PARTS (Total: \$0.00), SUBLETS (Total: \$0.00), CHARGES (Total: \$0.00), DISCOUNT (Total: \$0.00), and TAXES (Total: \$0.00). The 'GM' tab is highlighted in red. The main area shows a table with columns 'Labor Hours' and 'Labor Code'. A red banner at the top indicates 'Unassigned Labor Hours from Operation' with a value of 2.0. The table contains one row with 0.0 hours and labor code 9104085. An 'Add Labor' button is at the bottom.



Fields that are updated include:

Header Information

- VIN number
- Make
- Model
- Vehicle mileage (Miles In)
- License plate
- Service Advisor
- Visit Notes (RO Comments)
- 3 Department types supported*
- 2 Transportation options supported**
- Tag Number (HAT #)
- Promised Time
- 1 Charge Fee is supported
- 1 Ticket Level Discount is supported

*All other departments in Workbench default to Service in VUE.

** See Transportation Option Use Case on the following page.

Line Items/ Operations

- Part Details
- * Description
- * Number
- * Bin
- * Inventory
- * Quantity
- * Status
- * Unit Price
- * Total
- Labor Details
- * Description
- * GM Labor Op Code
- * Dealer Labor Op Code
- * Labor Hours
- * Labor Rate
- * Total
- Discounts
- * Parts Discount
- * Labor Discount
- * Service Discount

Customer Information

- Name
- Last name
- Email
- Address
- Phone numbers
- Preferred contact method type

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Transportation Option Use Cases

The Transportation field is prioritized when sending from VUE to Service Workbench.

For example:

1. If the following fields are selected:

- Arrival: Drop-Off
- Priority: Waiting
- Transportation: Loaner

VUE sends **Loaner** as the Transportation Type to Service Workbench.

2. If the transportation field is 'blank', and Drop-Off is selected as the Arrival Type, *AND 'Waiting' is NOT selected as the Priority Type*, then Drop-Off as the Transportation Type.

- Arrival: Drop-Off
- Priority: Yes
- Transportation: (blank)

VUE sends **Drop-Off** as the Transportation Type to Service Workbench.

3. If the transportation field is 'blank', and 'Waiting' is selected as the Priority Type, *AND 'Drop-Off' is NOT selected as the Arrival Type*, then Waiting is sent as the Transportation Type

- Arrival: Drive-In
- Priority: Waiting
- Transportation: (blank)

VUE sends **Waiting** as the Transportation Type to Service Workbench.

4. If the transportation field is 'blank', and 'Drop-Off' is selected as the Arrival Type, *AND 'Waiting' IS selected as the Priority Type*, then 'Drop-Off' is sent as the Transportation Type.

- Arrival: Drop-Off
- Priority: Waiting
- Transportation:

VUE sends **Drop-Off** as the Transportation Type to Service Workbench.

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Suggested Workflows for Dealers

From Service Workbench:

1. Start by finding the customer in Service Workbench (SWB).
2. Update customer info (as needed).
3. Complete Dashboard, Menu, MPVI, and generate line items as needed.
4. Create DMS RO in SWB and sync line items to DMS (Ensure all tasks needed for visit in SWB are completed.)
5. Complete RO work in VUE.
6. Close RO in the VUE. Sync RO to SWB.
7. Refresh SWB to ensure visit is updated to Complete.

From VUE DMS:

1. Start RO in VUE.
2. Start customer visit in SWB.
3. Import open RO into SWB.
4. Update customer info in SWB.
5. Complete Dashboard, Menu, MPVI and generate line items as needed (ensure all tasks needed for visit in SWB are completed).
6. Sync line items to the VUE.
7. Close RO in the VUE. Sync RO to SWB.
8. Refresh SWB to ensure visit is updated to Complete.

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