

Dealertrack Netchex API Guide

SCHEDULE IMPORTS

Employee Set-Up:

When setting up Scheduled Imports there are a few steps that need to be done before this will work correctly.

- **ACTION:** Before the API's are enabled you will need to populate the Payroll Employee # in Netchex. *This number is what is going to link your Technician and Sales Representative to the respective Employee set up in Netchex.*

DMS Service Department / Technician / Sales Rep and Team set up Screen:

Technician Setup

Tech ID Name Password Active

Employee No. Cost by Tech Log
 Payroll Emp No. Certification No.

Log Off Time Show Assigned ROs Default Service Type
 Assigned To* ALL Holds for Approval Holds for Parts
 Lunch Duration Holds for Other Holds for Comment
 Enter Warr. Codes Return to Dispatcher No. Of Service Bay

Customer Labor Cost	A	29.96	B	29.96	C	29.96	D	29.96
Warranty Labor Cost	A	29.96	B	29.96	C	29.96	D	29.96
Internal Labor Cost	A	29.96	B	29.96	C	29.96	D	29.96
Svc Contract Labor Cost	A	29.96	B	29.96	C	29.96	D	29.96

Start Time:

Lunch Begin:

End Time:

Ok Exit Skill Groups OEM Id Cancel Delete

Sales Representatives

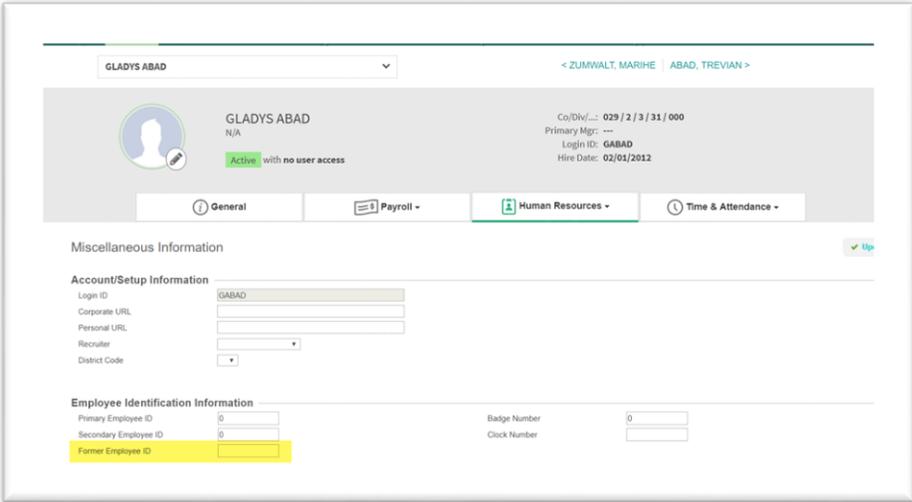
Sales ID Active Y
 Name Type*
 Employee # Team*

License #

	Rate	Spiff	Minimum
Gross	25.00		200.00
Price			
Net Price			
Holdback			
Document Fee			
Reserve			
Insurance			
Service Contract			
After Market			
Incentive			

Ok Exit OEM Id Cancel Delete

Netchex Employee List // Miscellaneous Information set up screen:

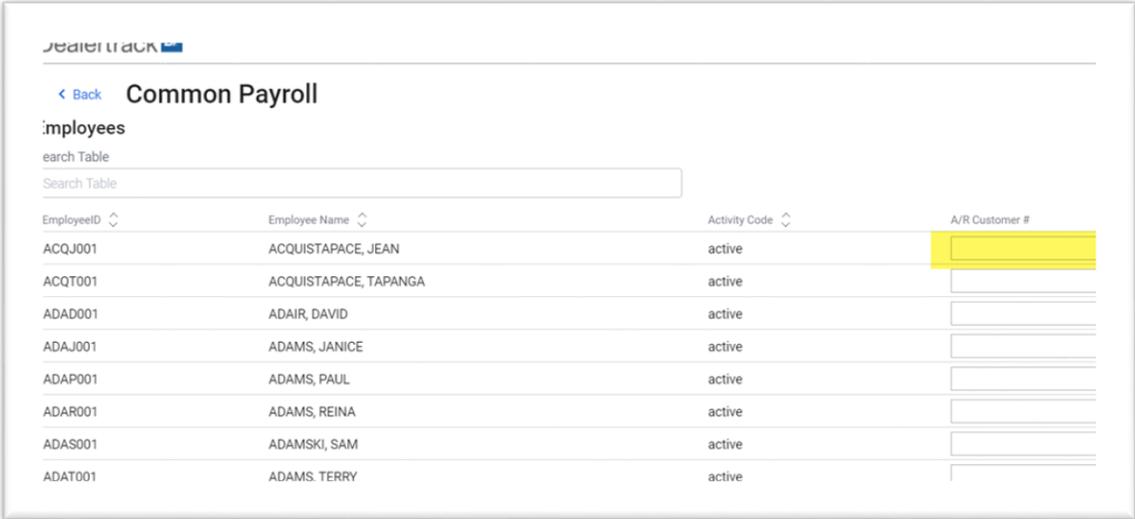


The screenshot shows the 'Miscellaneous Information' setup screen for employee Gladys Abad. The page includes a header with the employee's name and navigation options. Below the header, there are tabs for 'General', 'Payroll', 'Human Resources', and 'Time & Attendance'. The 'Human Resources' tab is selected. The main content area is divided into two sections: 'Account/Setup Information' and 'Employee Identification Information'. The 'Account/Setup Information' section contains fields for Login ID (GABAD), Corporate URL, Personal URL, Recruiter, and District Code. The 'Employee Identification Information' section contains fields for Primary Employee ID, Secondary Employee ID, Former Employee ID, Badge Number, and Clock Number. The 'Former Employee ID' field is highlighted in yellow.

Schedule Import:

The payroll import feature is designed to import general ledger account detail from the DMS to payroll. The only requirement to do the import is that the control number in the account are valid employee numbers and that there are unreconciled transactions in the account detail. This application can be used to import accrued totals such as manager’s bonuses or sales commissions. This increases the functionality and flexibility of the Netchex payroll system and its integration with the DMS accounting system.

If you are planning to use the Scheduled import functionality, information from the DMS to Netchex, or posting any payroll information to an Account Receivable account you will need to do verify the A/R Customer # is populated,



The screenshot shows the 'Common Payroll' section of the Dealertrack system. It features a search table for employees. The table has four columns: EmployeeID, Employee Name, Activity Code, and A/R Customer #. The first row is highlighted in yellow.

EmployeeID	Employee Name	Activity Code	A/R Customer #
ACQJ001	ACQUISTAPACE, JEAN	active	
ACQT001	ACQUISTAPACE, TAPANGA	active	
ADAD001	ADAIR, DAVID	active	
ADAJ001	ADAMS, JANICE	active	
ADAP001	ADAMS, PAUL	active	
ADAR001	ADAMS, REINA	active	
ADAS001	ADAMSKI, SAM	active	
ADAT001	ADAMS, TERRY	active	

- If you need to find the customer number for an employee to populate in Netchex, you can find it in General Ledger Application // Charge Customer (41) and search for your employee’s name. Under the “Customer” column will display their Account Receivable number.

Charge Customers

Customer

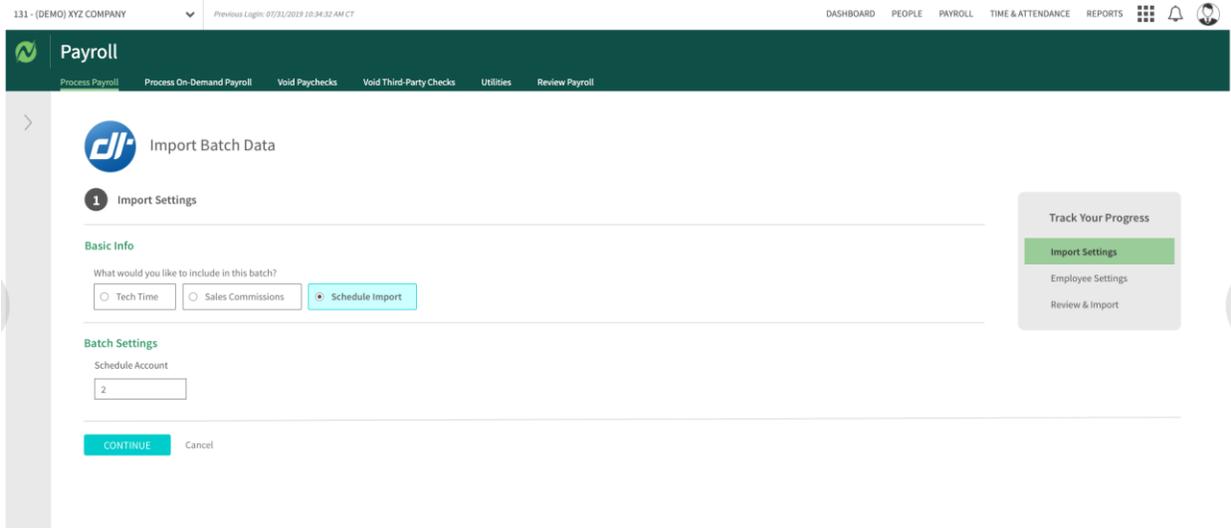
Position To ADAMS, CHARLES

Opt	Customer	Name	Phone	Address/Contact
<input type="checkbox"/>	10024908	ADAMS AUTOMOTIVE SERVICE	783-013-3976	PO BOX 14/OLD HANCOCK R
<input type="checkbox"/>	10018987	ADAMS, CHARLES D	352-610-8584	PO BOX 774 MEMPHIS
<input type="checkbox"/>	10023843	ADDLETON, ELAINE	992-248-2985	105 TERRACE ST CHARLOTT
<input type="checkbox"/>	10021448	ADE & PATS REPAIR	816-522-7210	P.O. BOX 225 14 FIRST S
<input type="checkbox"/>	10047871	ADELPHIA COMMUNICATIONS	316-293-8322	RD 1 LANSING
<input type="checkbox"/>	10017129	ADESA GOLDEN GATE	676-412-2440	397 TELFER HILL RD BEAU
<input type="checkbox"/>	10032488	ADESA OF INDIANAPOLIS	564-836-5733	1502 BUNKER HILL RD. SE
<input type="checkbox"/>	10015816	ADJMI, MR. JACK	902-890-1028	PO BOX 1067 OGDEN
<input type="checkbox"/>	10027152	ADKINS DRAIN SEWER & SEP	36-561-1743	116 MAIN ST EMINENCE
<input type="checkbox"/>	2111	ADP COMMERCIAL LEASING L	18-738-3648	HCR61 BOX 14 HOLLADAY

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How to use the API

Step #1: To begin the import navigate to the “Process Payroll” tab in Netchex and select “Schedule Import”



131 - (DEMO) XYZ COMPANY Previous Login: 07/21/2019 10:34:32 AM CT DASHBOARD PEOPLE PAYROLL TIME & ATTENDANCE REPORTS

Payroll

Process Payroll Process On-Demand Payroll Void Paychecks Void Third-Party Checks UTILITIES Review Payroll

Import Batch Data

1 Import Settings

Track Your Progress

- Import Settings
- Employee Settings
- Review & Import

Basic Info

What would you like to include in this batch?

Tech Time Sales Commissions Schedule Import

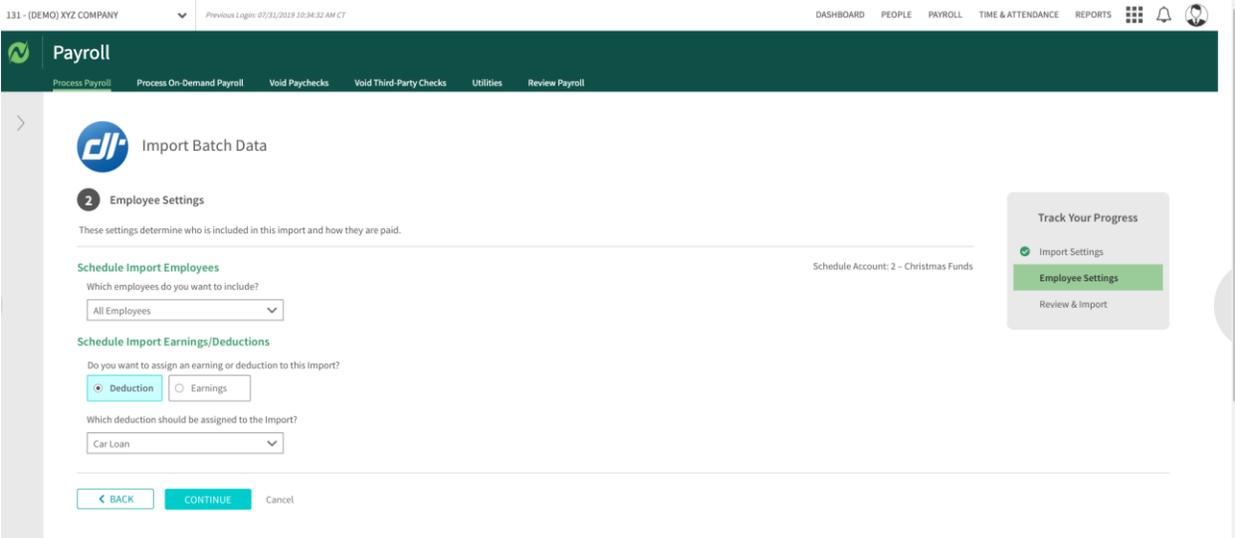
Batch Settings

Schedule Account

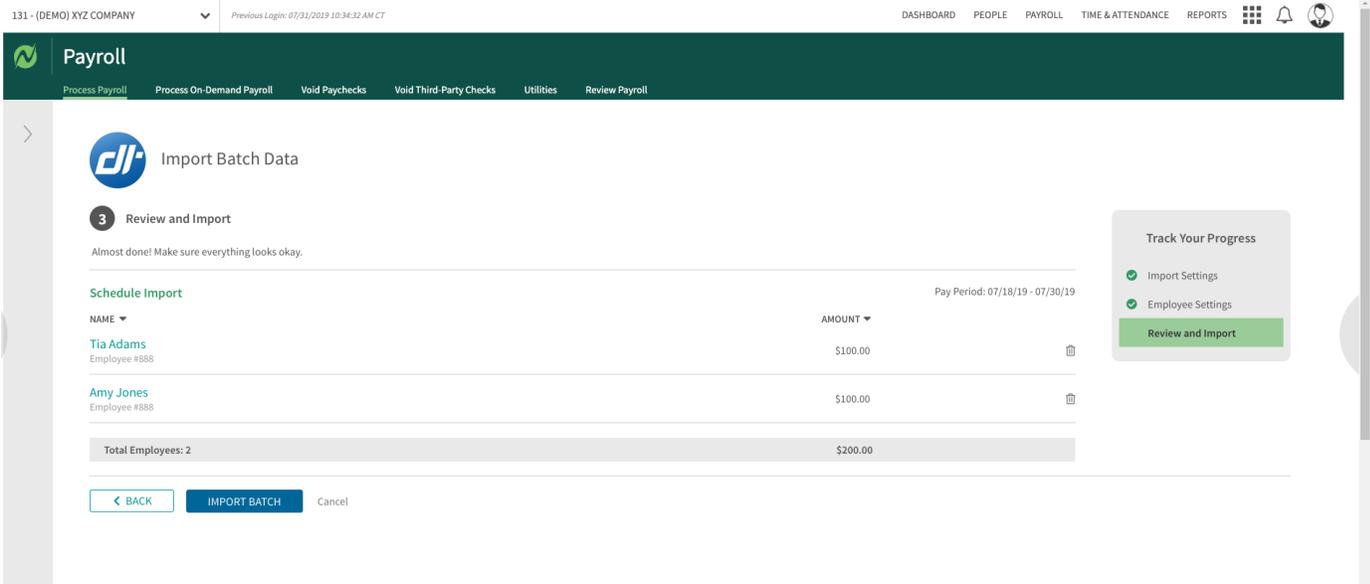
2

CONTINUE Cancel

Step #2: Select employee settings and choose all employees, the type of schedule import and deduction type. Then click Continue.



Step #3: A preview of all employees with Tech Time will be shown on the screen. If you need to make any changes click the back button and then go into Dealertrack DMS to make the changes and repeat steps #1 & #2. If all are correct click Import Batch



VIII: More Information or Updates

For the most current information or new updates to your API's or DMS, please visit [Dealertrack DMS360](#),