

## DMS Keystroke Integration

Infomediam applications have the ability to integrate with your Dealer Management System (DMS) using the Infomediam DMSi application. Transferring parts directly to your DMS saves time, reduces errors and streamlines operations within your dealership.

The Infomediam DMSi application requires the installation of the Microsoft .NET framework (minimum V3.5). If the Microsoft .NET framework is not installed the Infomediam DMSi will automatically include the Microsoft .NET framework.

Within Superservice Menus, you need to enable the DMSi integration. To do this, click **Settings** and **Technical Settings** and select XML 1.2 from the **Export Settings** drop-down menu. Then, click the **Integration Settings** tab and select the **Enable DMSi integration** checkbox.

### Install the DMSi application

To install the Infomediam DMSi:


- 1 Download the latest version of the DMSi from the Infomediam Landing page.
- 2 Open and extract the installation package.
- 3 Double click the **Setup.exe**.
- 4 Follow the installation steps of the wizard.

### Set up a new DMS connection

The Infomediam DMSi allows you to add either preconfigured or customised DMS connections. The DMSi can also be configured to operate connections for multiple Infomediam applications using the multi-user, multi-application settings.

#### Add a preconfigured DMS connection



To add a preconfigured DMS connection for a line by line transfer:

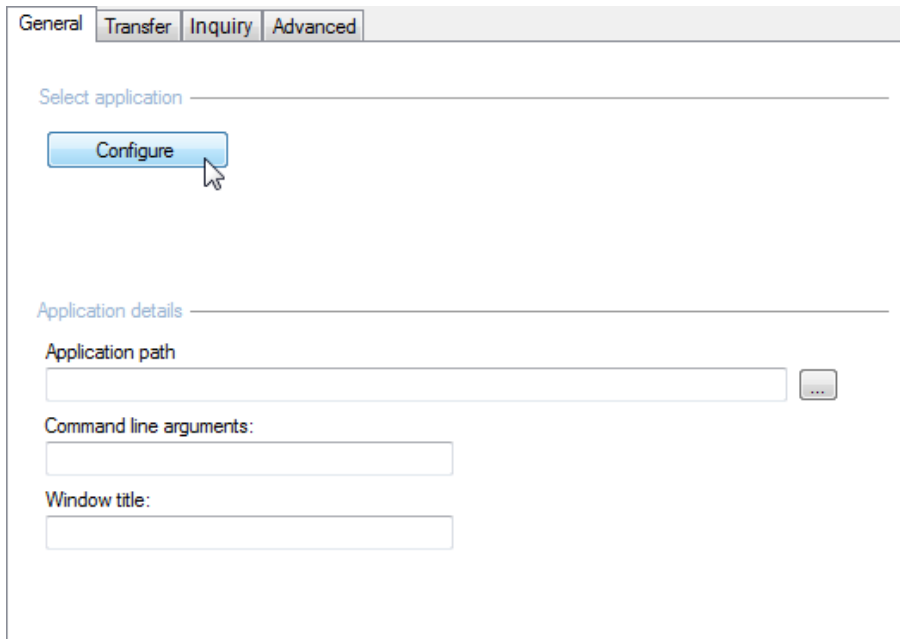
- 1 Right click the  icon on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select your Infomediam product from the **Application** drop-down menu.
- 4 Select from the **Use a preconfigured connection** drop-down menu and click **OK**.
- 5 Double click on your new DMS connection in the Available Connections frame.
- 6 Click **Settings** and confirm details or make changes, as required. For example:
  - In the General tab, change the Window title from DMS to the specific name of your DMS.
  - In the Transfer tab, change each transfer sequence that is used to send keystrokes to your DMS. There may be more than one transfer sequence.
- 7 Click **OK**.

## Add a custom DMS connection (Microcat LIVE/Auto PartsBridge)

If your preferred DMS connection does not appear in the preconfigured frame, you will need to add a new custom connection.

To add a custom DMS connection for a line by line transfer:

- 1 Right click the  icon on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select your Infomedica product from the **Application** drop-down menu.
- 4 Click **Add New** in the Custom connection frame.
- 5 Select **Send line by line** and click **Next**.
- 6 In the **General** tab, the application location and title must be specified.
  - If the DMS is currently running (recommended), click **Configure** and select **Yes**. Select your DMS from the list of applications and click **Next**. Confirm the application path and window title details and click **Finish**.
  - If the DMS is not currently running, click the  icon on the **Application path** field and select the required folder. Type the name of the DMS in the **Window title** field.



The screenshot shows a configuration window with the following elements:

- Tabbed interface: **General** (selected), **Transfer**, **Inquiry**, **Advanced**.
- Section: **Select application** with a dropdown menu.
- Button: **Configure** (highlighted with a mouse cursor).
- Section: **Application details**
  - Field: **Application path** with a text input box and a browse icon (three dots).
  - Field: **Command line arguments:** with a text input box.
  - Field: **Window title:** with a text input box.

- 7 In the **Transfer** tab, the transfer sequence needs to be configured correctly to send items to your DMS. The transfer sequence determines how each line on the Order List will be sent to the DMS.
  - View the transfer sequence in the Transfer Sequence frame. A default transfer sequence will be displayed.
  - Amend the transfer sequence, if required. Click the required buttons in the Add Sequence frame to specify the sequence.

- 8 In the **Inquiry** tab, a transfer sequence can be configured to send an inquiry on the availability of a part to the DMS.
  - View the transfer sequence in the Transfer Sequence frame. A default transfer sequence will be displayed.
  - Amend the transfer sequence, if required. Click the required buttons in the Add Sequence frame to specify the sequence.
- 9 In the **Advanced** tab, you can select additional window or transfer options. For example:
  - **Send keystrokes using:** If the default method of transfer is not compatible with the DMS, an alternative method can be selected.
  - **Disable the Transfer All action:** If you want to disable the Transfer All action, you can select this checkbox.
- 10 Once you have completed the settings, click **Next**.
- 11 Type a name for the DMS connection and click **Finish**.
- 12 Click **OK**.

## Configure the DMSi for multiple applications

The DMSi can be configured to support connections from multiple Infomedial applications, such as multi-franchise versions of Microcat LIVE and Superservice Menus. You need to enter a user ID and unique port number for each user and then add this information into the appropriate settings area of each Infomedial application.

For line by line (keystroke) connections, the DMSi will only support connections to DMS applications running on the same computer as the DMSi. Where dealerships are using advanced integration protocols such as MMP and batch file, the DMSi application can be configured on a server to support multiple user connections.

### To configure the DMSi for multiple applications:

- 1 Add a new preconfigured or customised connection as described above or access the settings of an existing DMS connection.
- 2 Select the **Advanced Settings** checkbox and type a user ID and port number.

The port number must be unique to every user/application combination. Each port number which has been assigned to a user must be entered into the corresponding Infomedial application.



**Advanced Settings**

For advanced integration, multi-application or multi-user setup, type a user ID and port number.

User ID: BSMITH

Port: 49985

- 3 Click **OK**.
- 4 Add additional connections as required.

### To configure the user's Infomedial application:

- 1 Log on to the Infomedial application on the user's PC.
- 2 Access the Settings window in the Infomedial application.
  - Microcat LIVE: Click **Settings** > **Integration Settings**.
  - Superservice Menus: Click **Settings** > **Technical Settings** > **DMS Settings**.
  - Auto PartsBridge: Click **Settings** > **Add-Ons**.
- 3 Enter the same port number that was entered into the DMSi.
- 4 Close the Settings window.

## Transfer parts or service information to your DMS

Once the DMSi is configured, you can transfer parts or service information from an Infomedica product to your DMS. With a keystroke DMS connection, each part or service item is transferred one line at a time.

### To transfer parts from Microcat LIVE to the DMS:

- 1 In Microcat LIVE, add parts to the Order List.
- 2 Click the **Transfer** drop-down menu and select **DMS**.
- 3 In the Transfer List window, select each part and click **Transfer**.

### To transfer service information from Superservice Menus to the DMS:

- 1 In Menus, add a service operation or repair to the Quoting and RO System.
- 2 Click the **Transfer** drop-down menu and select **DMS**.
- 3 In the Transfer List window, select each item and click **Transfer**.

### To transfer service information from Superservice Triage to the DMS:

- 1 In Triage, mark the status of the VHC as **Completed** and then click **Save**.
- 2 Click **Transfer to DMS**.
- 3 Select the operations and click **Transfer Work**.
- 4 In the Transfer List window, select each item and click **Transfer**.

### To send parts from Auto PartsBridge to the DMS:

- 1 In Auto PartsBridge, finalise your order in the Order screen.
- 2 Obtain the invoice number from your DMS for each line item in Auto PartsBridge.
- 3 Click **Send to DMS** in the Order screen.
- 4 In the Transfer List window, select each part and click **Transfer**.
- 5 Type the invoice number from your DMS into the **Invoice Number** field.
- 6 Click **Order Details** to view the full list of parts and to enter the invoice numbers for parts that are on different DMS invoices.
- 7 Click **Apply**.

- ▶ Throughout this Guide, all references to Microcat LIVE are also applicable to Microcat V6.
- ▶ Throughout this Guide, all references to Superservice Menus are also applicable to Service Menu Pricing and Service Pricing.