INFOMEDIA™

DMS Integration Guide
Ford Europe

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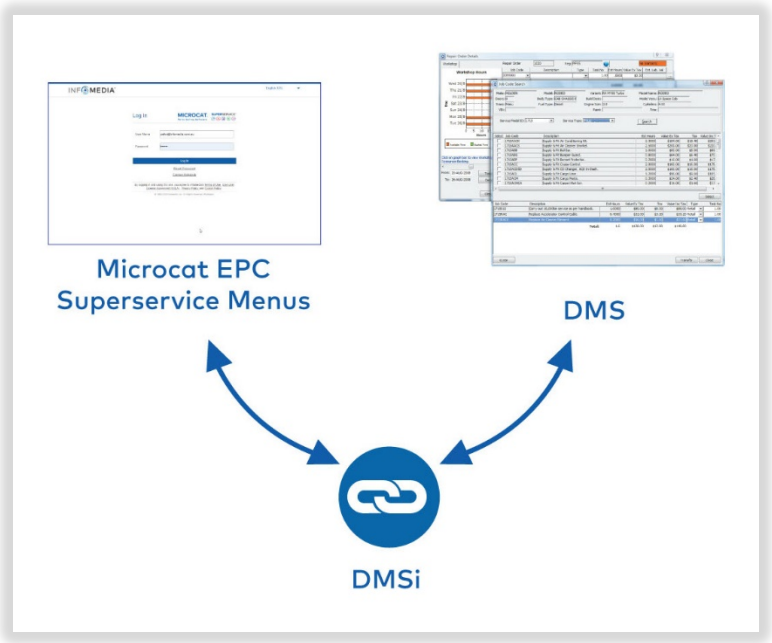
Introduction

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

This guide is divided into the following sections:

- Install the DMSi application
- Configure the DMSi for multiple applications
- Set up DMS Integration with Microcat EPC
- Set up DMS Integration with Superservice Menus
- Manage integration settings



- For more information on DMS integration, contact Customer Service: https://www.infomedia.com.au/contact/customer-support.

Install the DMSi application

The Infomedia DMSi must be installed and configured to enable the integration between Infomedia products and the DMS. The application setup is a 1-click installation that will allow auto-updating when new versions are released.

The application can be installed locally on each computer or centrally on a server depending on the dealer's requirements. The Infomedia DMSi requires the Microsoft .NET framework (latest version) and will automatically include the Microsoft .NET framework in the DMSi installation, if required.

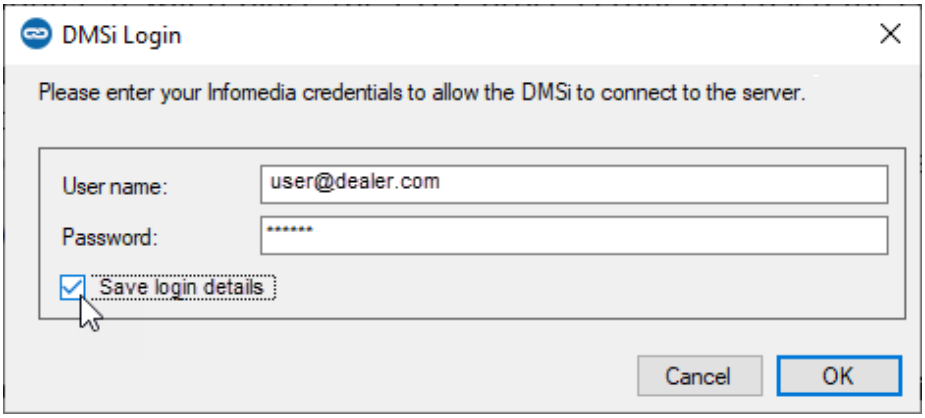
To install the Infomedia DMSi:

1. Go to this website: https://dmsi.autopartsbridge.com/ui/DMSi/publish.htm.
2. Select the language from the drop-down and click **Install**.

   The Infomedia DMSi application will be downloaded.
3. Click the DMSi file to open it and start the installation.
4. Click **Install**.

   The installation may take several minutes.
5. When prompted, enter your user name and password.

   Use the same login credentials that you use to log into Microcat EPC or Superservice Menus.
6. Click the **Save login details** checkbox and then click **OK**.



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Configure the DMSi for multiple applications

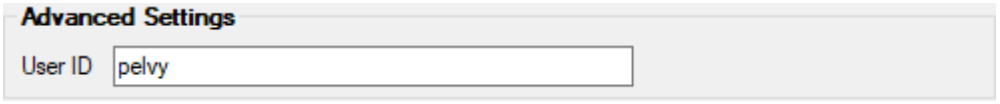
The DMSi can be configured to support connections from multiple Infomedia applications, such as multi-franchise versions of Microcat EPC. When you set up a DMSi connection, the User ID field will be filled out automatically.

Where dealerships are using advanced integration protocols such as web services 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, if required.

   The User ID field will be automatically filled when you set up a DMSi connection.

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

Set up DMS integration with Microcat EPC

Once the DMSi has been installed, you can set up a DMS connection in the DMSi and then configure the integration settings within Microcat EPC.

Depending on the connection type you select when you log in, Superservice Menus can then exchange data with your DMS and transfer parts and service information to your DMS.

Set up a new DMS connection

The Infomedia DMSi allows you to add either preconfigured or customised DMS connections.

Add a preconfigured DMS connection

If the settings for your preferred DMS connection have been automatically preconfigured in the DMSi, the DMS connection will be available in the Preconfigured connections frame.

To add a preconfigured DMS connection:

1. Right-click the **DMSi** icon on the Windows taskbar and select **Settings**.
2. Click **Add New**.
3. Select **Microcat EPC – Ford Europe** from the **Select application** drop-down.
4. Select your DMS from the **Use a preconfigured connection** drop-down 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.
7. Click **OK**.

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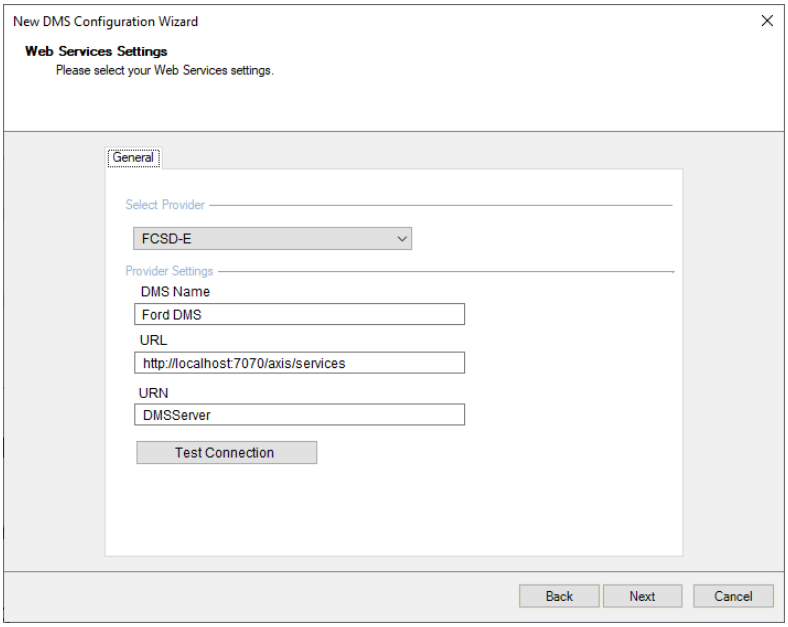
Add a custom DMS connection

The Infomedia DMSi allows you to add customised DMS connections.

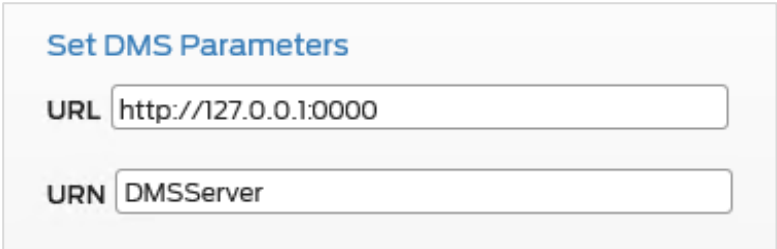
To add a custom connection for a web services-based DMS:

1. Right-click the icon on the Windows taskbar and select **Settings**.
2. Click **Add New**.
3. Select **Microcat EPC – Ford Europe** from the **Select application** drop-down.
4. Click **Add New** in the **Set up a custom connection** frame.
5. Select **Integrate with a Web-Services-based DMS** and click **Next**.
6. Specify the web services settings in the **General** tab.

   By default, **FCSD-E** will be selected automatically as the provider.
7. Enter the **DMS Name**, **URL** and **URN** in the **Provider Settings** fields.



The information can be copied from Ford eCat (**More** → **Settings** → **Administration tab** → **DMS Server**) or supplied by the Dealer Service Provider (DSP).



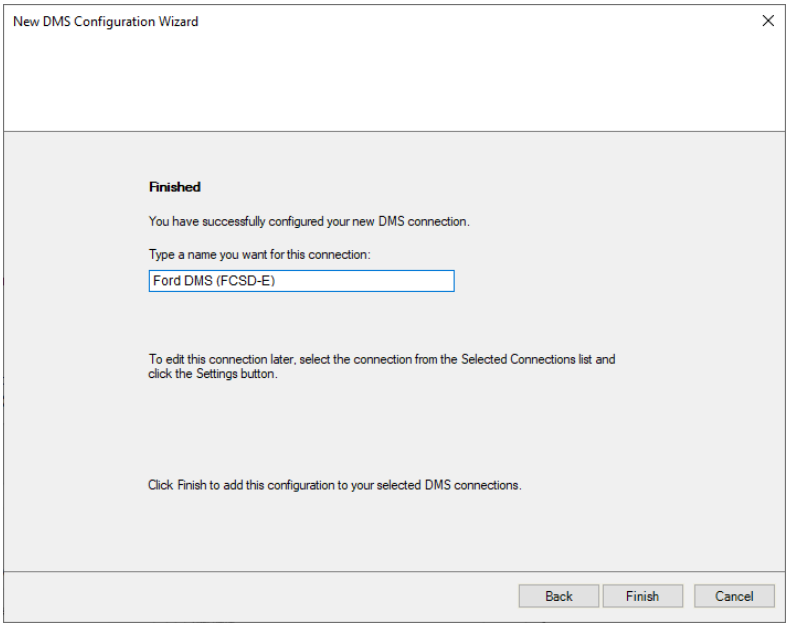
8 Click **Test DMSi Connection** to ensure a successful connection with the DMSi.

If you are unable to connect, check your settings.

9 Once your settings are complete, click **Next**.

10 Confirm the name or type a new name for the DMS connection and click **Finish**.

By default, the DMS name entered in the Provider Settings will be displayed.



11 Click **OK**.

The new DMS connection will be displayed in the Available Connections panel of the Integration Settings window in the DMSi.

- To check your DMSi settings at any time, right-click the Infomedia DMSi 8 icon on your Windows taskbar and select **Settings**.

Configure the DMSi Integration Settings

Once the DMSi is installed, you need to check and configure the DMSi settings within Microcat EPC.

New and previous DMSi connections will be displayed in the Available Connections drop-down within the Integration tab of the Settings window.

To set up the DMSi integration within Microcat EPC:

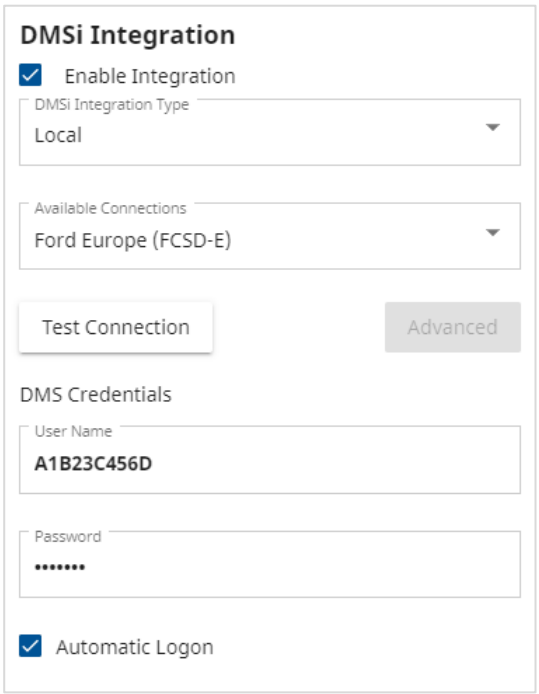
1. Access Microcat EPC, click the icon and select **Settings**.
2. Select the **Integration** tab and view your DMSi Integration settings.
3. Click the **New DMSi Application** icon to activate the new DMSi.
4. Select **Local** from the **DMSi Integration Type** drop-down.
5. Select your DMS connection from the **Available Connections** drop-down.

   If you have multiple DMS connections, you must select the required connection.
6. Click **Test Connection** to check that the connection to the DMSi is successful (if required).

   When you select your connection, an automatic test is performed.
7. Enter your DMS user name and password.

   Your DMS credentials are different from your Microcat EPC credentials.
8. Select the **Automatic Logon** checkbox.

   If the checkbox is not selected, you will be prompted to enter the DMS credentials each time you logon.



Configure the DMS Pricing

You can select the default pricing source to use when ordering parts, such as Microcat Pricing or DMS Pricing. The DMS Pricing option will only be listed in the drop-down if you have already set up the DMSi and have connected to the DMS.

To set up the DMS pricing within Microcat EPC:

1. In Microcat EPC, click the icon and select **Settings**.
2. Select the **General** tab in the Settings window.
3. Select **DMS Pricing** from the **Pricing Source** drop-down.
4. Select the price level from the **Default Pricing Level** drop-down.

   This will be the price level used when ordering parts.

5. Close the Settings window.

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Log in to the DMS

Once your settings are complete, you can log in to the DMS from Microcat EPC. You will then need to select a connection type. There are three types of connection to the DMS.

Connection Type 1 - Default

- This connection type uses no customer or vehicle information from the DMS. The vehicle is selected within Microcat EPC.
- It allows only part and fluid information lookups from the DMS, without any customer-specific pricing.
- This connection type does not allow you to transfer an order to the DMS.

Connection Type 2 - Current DMS Session

- This connection type uses customer or vehicle information from an open session within the DMS.
- The list of results will be displayed, allowing you to select one.
- The information about the selected customer and vehicle will be loaded.
- This connection type allows you to transfer an order to the DMS.

Connection Type 3 - Microcat EPC Session

- This connection type allows you to search the DMS for customer or vehicle information.
- The list of results will be displayed, allowing you to select one.
- The information about the selected customer and vehicle will be loaded.
- This connection type allows you to transfer an order to the DMS.

▸ To change the type of connection to your DMS, click the icon.

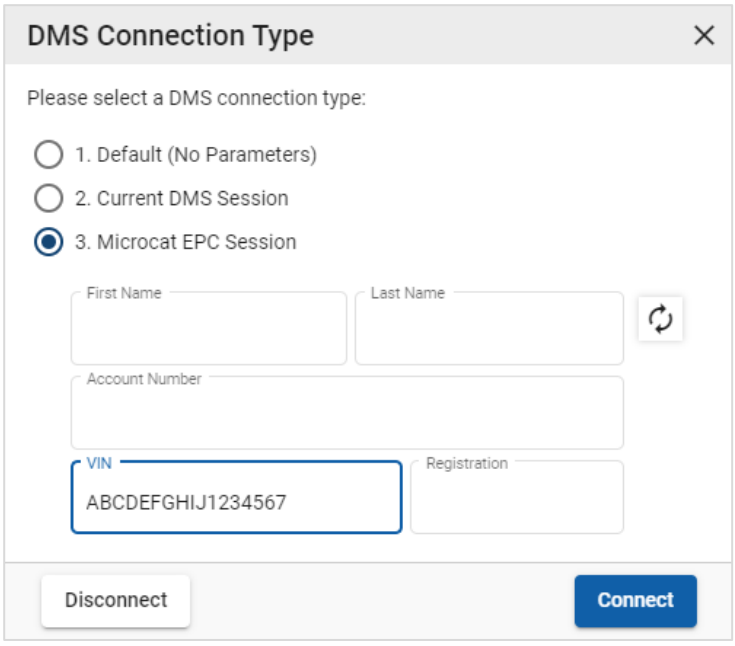
To log on to the DMS and select the connection type:

1 Click the DMS icon on the status bar.

When successfully connected, the DMS icon will display as green.

2 Select your connection type and click **Connect**:

- **Default (No Parameters)**: There is no further action for this option.
- **Current DMS Session**: After you click Connect, a list of your current open sessions will be displayed.
- **Microcat EPC Session**: Enter your search criteria, such as the customer name or VIN, to perform a search on the DMS. If any customer details are already loaded, they will automatically populate the customer or vehicle information.



3 Select the customer record that you want from the list (if required).

The customer and vehicle information will be loaded.

View the part information

In Microcat EPC, when you view the Part Data Card a DMS tab will be displayed. When the DMS is connected, you can view the part information, the DMS stock and the pricing details.

If the Current DMS Session or the Microcat EPC Session connection types were selected, then customer-specific pricing will also be shown (if available).

To view the part data from the DMS in Microcat EPC:

1. In Microcat EPC, navigate to a section illustration.
2. Click the callout in the illustration or the part number in the list to display the Part Data Card.
3. Click the **DMS** tab on the Part Data Card.

4. View the part information.
5. View the customer-specific pricing information in the **Customer (exc. VAT)** and **Customer (inc. VAT)** fields.
6. View the **Bin Location** and **SOH** details.

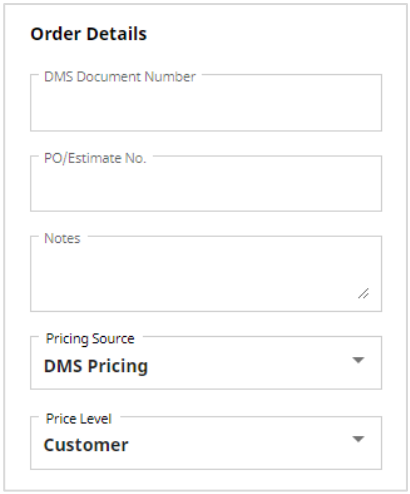
Transfer parts to the DMS

The Order screen will automatically be updated with the DMS pricing and stock details (if the DMS pricing source is selected in the Settings window).

If the Current DMS Session or the Microcat EPC Session connection types were selected, you can transfer parts information from Microcat EPC to your DMS.

To transfer parts from Microcat EPC to the DMS:

1. In Microcat EPC, add parts to the order.
2. In the **Order Details** tab, select **DMS Pricing** in the **Pricing Source** drop-down and select **Customer** in the **Price Level** drop-down (if required).



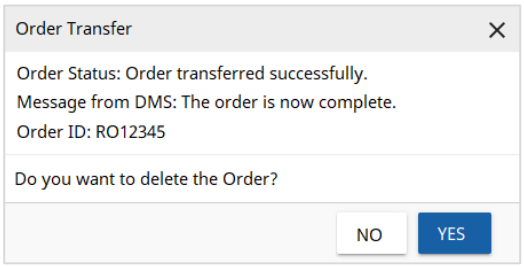
3. View the part details in the Order screen.

   The information about parts, SOH and pricing will be updated.

4. Click the

drop-down and select **DMS**.
5. If the transfer is successful, the Order Transfer window will be displayed.

   If you click **No**, the connection with the DMS will be retained. If you click **Yes**, you will delete the order from Microcat EPC, and you will be logged out of the DMS.



   If the order transfer was successful but is still pending, further action may be required directly in the DMS to finalise the order. If the order failed to transfer, it means there is an issue with the order that will need to be resolved.

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Set up DMS integration with Superservice Menus

Once the DMSi has been installed, you can set up a DMS connection in the DMSi and configure the integration settings within Superservice Menus.

Depending on the connection type you select when you log in, Superservice Menus can then exchange data with your DMS and transfer parts and service information to your DMS.

Set up a new DMS connection

The Infomedia DMSi allows you to add either preconfigured or customised DMS connections.

Add a preconfigured DMS connection

If the settings for your preferred DMS connection have been automatically preconfigured in the DMSi, the DMS connection will be available in the Preconfigured connections frame.

To add a preconfigured DMS connection:

1. Right-click the **DMSi** icon on the Windows taskbar and select **Settings**.
2. Click **Add New**.
3. Select **Superservice Menus - All Franchises** from the **Select application** drop-down.
4. Select your DMS from the **Use a preconfigured connection** drop-down 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.
7. Click **OK**.

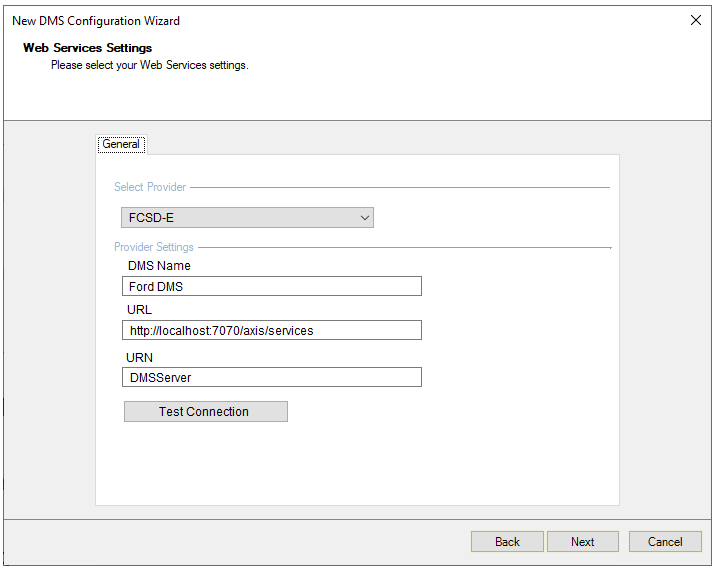
Add a custom DMS connection

The Infomedia DMSi allows you to add customised DMS connections.

To add a custom connection for a web services-based DMS:

1. Right-click the icon on the Windows taskbar and select **Settings**.
2. Click **Add New**.
3. Select **Superservice Menus - All Franchises** from the **Select application** drop-down.
4. Click **Add New** in the **Set up a custom connection** frame.
5. Select **Integrate with a Web-Services-based DMS** and click **Next**.
6. In the **General** tab, the web services settings must be specified.

   By default, **FCSD-E** will be selected automatically as the provider.
7. Enter the **DMS Name**, **URL** and **URN** in the **Provider Settings** fields.



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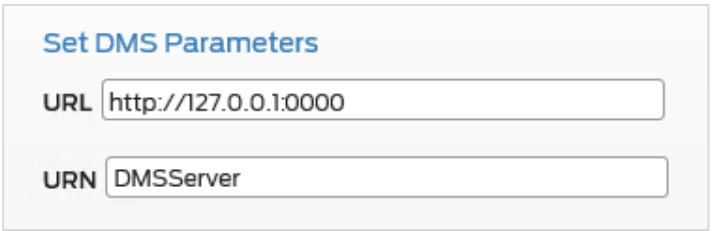

8. Click **Test DMSi Connection** to ensure a successful connection with the DMSi.

   If you are unable to connect, check your settings.
9. Once your settings are complete, click **Next**.

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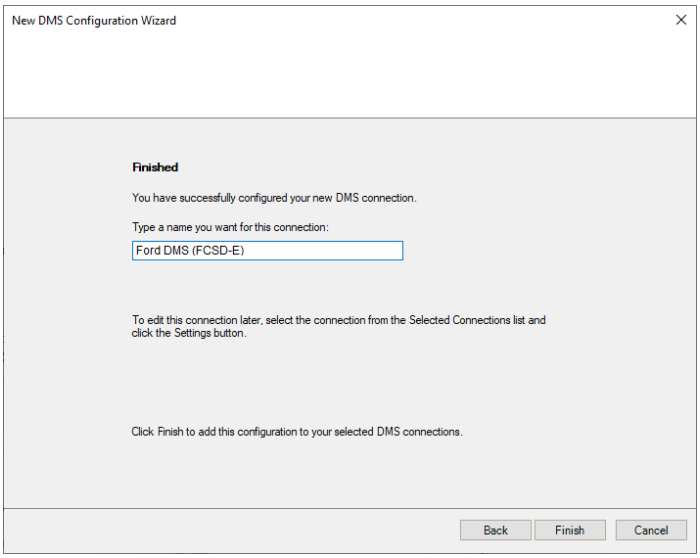
10 Confirm the name or type a new name for the DMS connection and click **Finish**.

By default, the DMS name entered in the Provider Settings will be displayed.



11 Click **OK**.

The new DMS connection will be displayed in the Available Connections panel of the Integration Settings window in the DMSi.

- To check your DMSi settings at any time, right-click the Infomedia DMSi 8 icon on your Windows taskbar and select **Settings**.
- For information on installing the DMSi on a server, refer to the DMSi Server Installation Guide for Superservice Menus.

Configure the DMSi Integration Settings

Once the DMSi is installed, you need to check and configure the DMSi settings within Superservice Menus.

All DMSi connections will be displayed in the Available Connections drop-down in the Integration Settings screen within Superservice Menus. You must confirm that the required connection is selected.

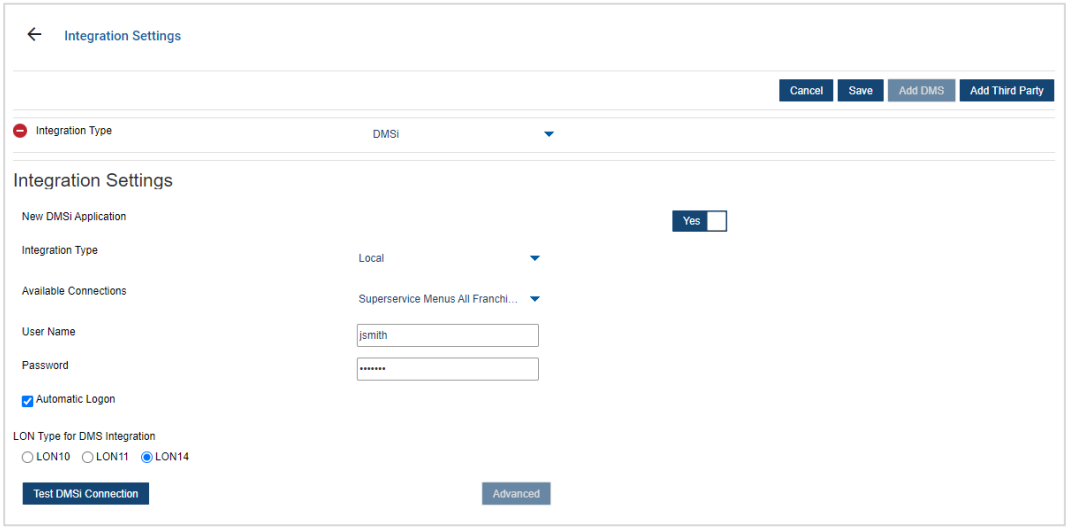
To set up the DMSi integration within Superservice Menus:

1. Access Superservice Menus and click the ⚙ icon.
2. Select **Integration Settings** and click **Edit**.
3. Click the **New DMSi Application** icon

to activate the new DMSi.
4. Select **Local** from the **Integration Type** drop-down.
5. Select your DMS connection from the **Available Connections** drop-down.

   If you have multiple DMS connections, you must select the required connection.
6. Enter your DMS user name and password.

   Your DMS credentials are different from your Superservice Menus credentials.



7. Select the **Automatic Logon** checkbox.

   If the checkbox is not selected, you will be prompted to enter the DMS credentials each time you logon.
8. Select the required **LON Type for DMS integration**.
9. Click **Save**.
10. Click

to ensure a successful connection with the DMSi.

    When you select your connection, an automatic test is performed.

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Log in to the DMS

Once your settings are complete, you can log in to the DMS from Superservice Menus. You will then need to select a connection type. There are three types of connection to the DMS.

Connection Type 1 - Default

- This connection type uses no customer or vehicle information from the DMS. The vehicle is selected within Superservice Menus.
- It allows you to only look up the labour information for an operation from the DMS.
- This connection type does not allow you to transfer an order to the DMS.

Connection Type 2 - Current DMS Session

- This connection type uses customer or vehicle information from an open session within the DMS.
- The list of results will be displayed, allowing you to select one.
- The information about the selected customer and vehicle will be loaded.
- This connection type allows you to transfer an order to the DMS.

Connection Type 3 - SSM Session

- This connection type allows you to search the DMS for customer or vehicle information.
- The list of results will be displayed, allowing you to select one.
- The information about the selected customer and vehicle will be loaded.
- This connection type allows you to transfer an order to the DMS.

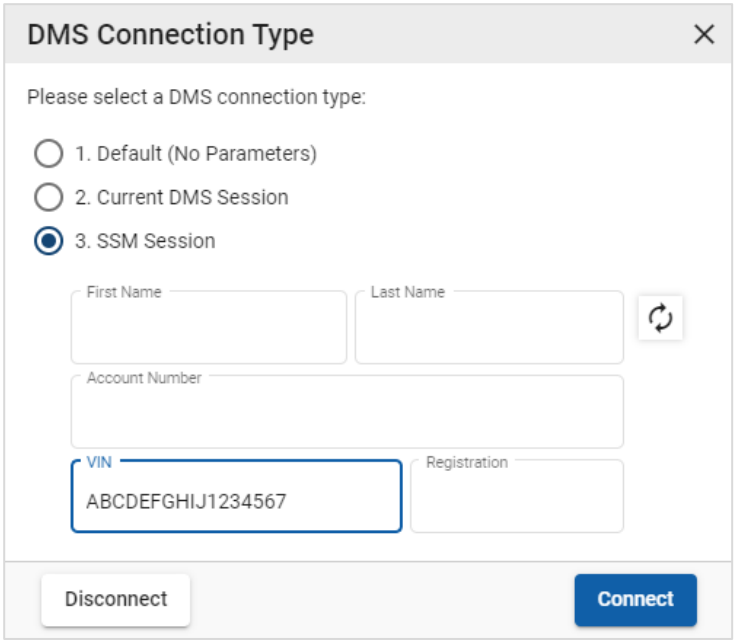
To log on to the DMS and select the connection type:

1 Click the DMS icon on the status bar.

When successfully connected, the DMS icon will display as green.

2 Select your connection type and click **Connect**:

- **Default (No Parameters)**: There is no further action for this option.
- **Current DMS Session**: After you click Connect, a list of your current open sessions will be displayed.
- **SSM Session**: Enter your search criteria, such as the customer name or VIN, to perform a search on the DMS. If any customer details are already loaded, they will automatically populate the customer or vehicle information.



3 Select the customer record that you want from the list (if required).

The customer and vehicle information will be loaded.

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View DMS pricing options

For service or labour menus, you will be able to view the DMS pricing options and the available SSM price options. By default, the DMS retail price will be selected. For parts added to an order, the DMS pricing details will be displayed.

If the Current DMS Session or the Microcat EPC Session connection types were selected, then the customer-specific pricing will also be shown (if available).

Transfer service information to the DMS

If the Current DMS Session or the Microcat EPC Session connection types were selected, you can transfer parts or service information from Superservice Menus to your DMS.

To transfer parts and service information to your DMS:

1. Start your DMS.
2. In your DMS, open the order that you want to transfer the data to.
3. In Superservice Menus, select a service operation or repair.
4. View the DMS retail pricing on the quote.
5. Select a different price level from the **Price Type** drop-down (if required).

   To display the default Superservice Menus pricing, select **Technical** in the **Price Type** drop-down.
6. After you have selected the correct price level, click **Add to Quote.**
7. Confirm the details of the quote.
8. Click the

drop-down, select **Transfer**, and then select **DMSi**.

   The parts and service information will be transferred to your DMS.

Manage integration settings

DMS connections are maintained in the Integration Settings window. Multiple DMS connections can be set up and will be displayed in the Available Connections frame.

To access the Integration Settings window, right-click the **DMSi** icon on the Windows taskbar and select **Settings**.

Delete a connection

Connections that are no longer required can be deleted.

To delete a connection:

1. Select the required DMS connection.
2. Click **Delete**.
3. Click **OK** to confirm the deletion.

Edit a connection

Existing DMS connections, including preconfigured connections, can be edited as required.

To edit an existing connection:

1. Select the required DMS connection.
2. Click **Settings**.

   The configuration settings that were selected when the connection was created will be displayed.
3. Amend the settings in each tab as required and click **OK**.

Export or import a connection

DMS connections can be exported or imported in an .xml format. This enables DMS connections to be shared across different users.

To export a connection:

1. Select the required DMS connection.
2. Click **Export**.
3. Specify a location to save the file to and click **Save**.

   The DMS connection will be written to an .xml file at the specified location.

To import a connection:

1. Click **Add New**.
2. Select from the **Application** drop-down.
3. Click **Import XML**.
4. Navigate to the .xml file that contains the DMS connection.

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