MICROCAT. EPC.

DMS KEYSTROKE GUIDE

Microcat has 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.
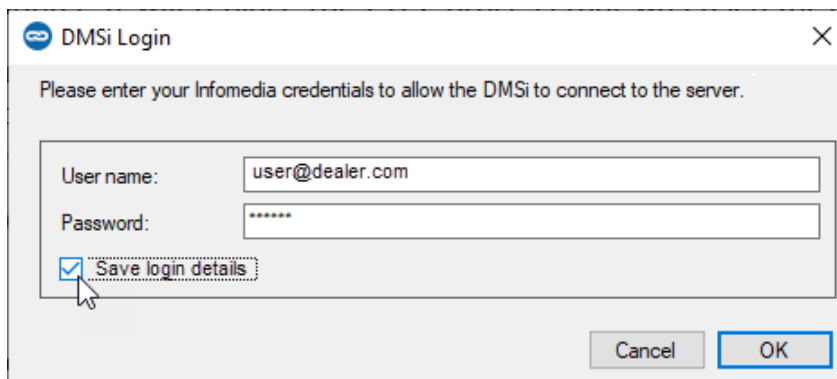
Install the DMSi application

The Infomedia DMSi must be installed and configured to enable the integration between Infomedia products and the DMS. When you install the Infomedia DMSi 8, all previous DMSi settings will be retained.

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.
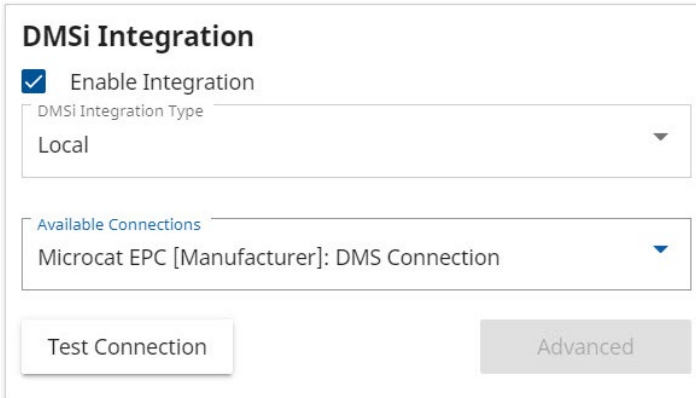6   Click the **Save login details** checkbox and click **OK**.

Set up the DMSi integration in Microcat EPC

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 in the Integration tab of the Settings window. You must confirm the required connection is selected.

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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 your DMS connection from the **Available Connections** drop-down.

   If you have multiple DMS connections, you must select the required connection.

   DMSi Integration

   ☑ Enable Integration

   DMSi Integration Type
   Local ▾

   Available Connections
   Microcat EPC [Manufacturer]: DMS Connection ▾

   Test Connection   Advanced

5. Close the Settings window.
6. Click the DMSi icon 🖧 to ensure a successful connection with the DMSi 🖧.

   You are now ready to transfer parts to your DMS.

Transfer parts to the DMS

You can transfer parts information from Microcat EPC to your DMS. With a keystroke DMS connection, each part is transferred one line at a time.

To transfer parts from Microcat EPC to the DMS:

1. In Microcat, add parts to the order.
2. Click the TRANSFER ▾ drop-down menu and select **DMS**.

   The first time you click Transfer, you will be prompted to launch your DMS.
3. In the Transfer List window, select each part and click **Transfer**.

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

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 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 Infomedia 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 to the specific name of your DMS.

- In the Transfer tab, change each transfer sequence that is used to send keystrokes to your DMS.
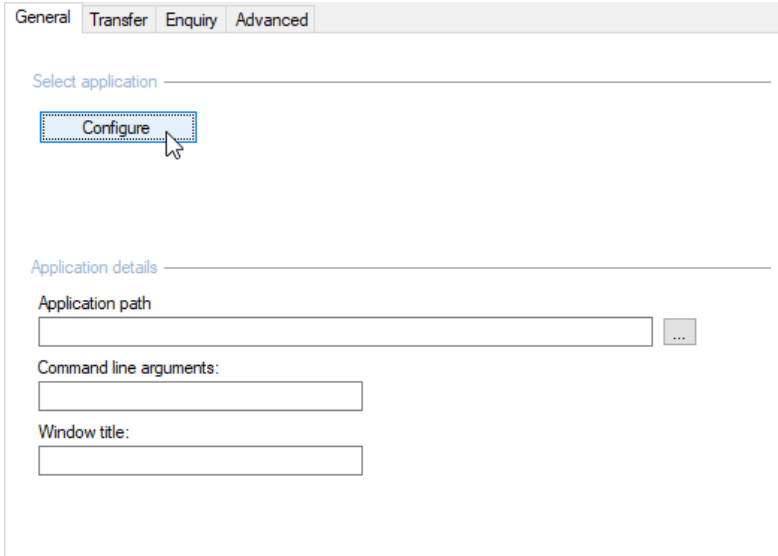
7   Click **OK**.

Add a custom DMS connection

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 Infomedia 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.

7 In the **Transfer** tab, a transfer sequence can be configured to send each line on the Order List to the DMS.

- View the default transfer sequence in the Transfer sequence frame.

- Amend the transfer sequence if required. Click the required buttons in the Add sequence frame to specify the sequence.

8 In the **Enquiry** tab, a transfer sequence can be configured to send an enquiry on the availability of a part to the DMS.

- View the default transfer sequence in the Transfer sequence frame.

- 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.

10 Once you have completed the settings, click **Next**.

11 Type a name for the DMS connection and click **Finish**.

12 Click **OK**.

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