

GETTING STARTED GUIDE

ORDER MANAGER

The Infomedia Order Manager gives you complete control of your customer orders.

Access the Order Manager from the Infomedia Landing Page.

To get started, take a look at the main screens.

SELECT ORDER

The Select Order screen is the first screen you see when you log on to Order Manager.

See a summary of your orders and their order status.

Order Code	Dealer Code & City	PO Number	Customer	Date	Status	Total
151002-070908596	30/9DLR001 - New City	SP5112	ST IMT PROD 2_2	10/02/15 17:09	Saved	0.63
151002-055842843	30/9DLR001 - New City	SP3321	ST IMT PROD	10/02/15 15:58	Saved	249.91
160318-013221491	30/9DLR001 - New City	3982231	ST IMT PROD 2_1	03/18/16 12:32	Completed	116.89
160318-013109870	30/9DLR001 - New City	556223	ST IMT PROD 2_1	03/18/16 12:31	New	4.14
160318-013014437	30/9DLR001 - New City	908112	ST IMT PROD 2_1	03/18/16 12:30	New	134.49
160315-205241461	30/9DLR001 - New City	123223	ST IMT PROD 2_1	03/16/16 07:52	New	172.88
160312-004422663	30/9DLR001 - New City	123112	ST IMT PROD	03/12/16 11:44	Completed	91.46
160115-033409625	30/9DLR001 - New City	123321	ST IMT PROD 2_1	01/15/16 14:34	New	2,021.47
150930-072915464	30/9DLR001 - New City	908112	ST IMT PROD 2_1	09/30/15 17:29	Completed	248.30
160314-18431332	30/9DLR001 - New City	556223	ST IMT PROD 2	03/15/16 05:43	In Progress	177.97

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- 1 The Select Order tab allows you to view and track all your orders.
- 2 Search for orders using the customer name or the order number.
- 3 View order details such as the PO Number, Customer, Date and Status.
- 4 Click an order at any time to see the details and process the order.
- 5 Click the Date or Status links to display the advanced filtering options.

ORDER DETAILS

The Order Details screen is used to view and process orders. Just click the Status link to change the status of an order. You can print, email and transfer an order. When you save an order, the Audit Trail will record your work.

ORDER MANAGER

Select Order: 160228-232304396

Order Details: 160228-232304396

1 **Total: 352.13**

IMT 1 Test Dealer JG
PO Number: 88
Placed: 02/29/16 10:23
Modified: 03/11/16 11:59 by Test Dealer Contact
User1 Mech
Shipping Type: Day Courier
Order Type: Picking slip

Customer Address:
IMT Test User
987987 a st
Beverly Hills
✉ imt1_tm@ifm.com
Phone: 987987984798

Shipping Address:
IMT Test User
987987 a st
Beverly Hills
✉ imt1_tm@ifm.com
Phone: 987987984798

Order Notes:
Please send all available parts to normal shipping address by 11 AM.


<input type="checkbox"/>	Model	Part Number	Description	Status	Price	Qty.	Ext Price	
<input checked="" type="checkbox"/>	HATCHCAR (2000-2004)	81680AC030	LAMP ASSY, BACK UP, LH	Shipped	03/16/2016	105.59	1	105.59
<input checked="" type="checkbox"/>	HATCHCAR (2000-2004)	81670AC030	LAMP ASSY, BACK-UP, RH	Shipped	03/16/2016	105.59	1	105.59
<input type="checkbox"/>	HATCHCAR (2000-2004)	81270AC020	LAMP ASSY, LICENSE PLATE	On Back Order	03/16/2016	29.82	1	29.82
<input checked="" type="checkbox"/>	HATCHCAR (2000-2004)	81570AC010B0	LAMP ASSY, CENTER STOP	Shipped	03/16/2016	106.45	1	106.45
<input checked="" type="checkbox"/>	HATCHCAR (2000-2004)	9098111059	BULB (FOR CENTER STOP LAMP)	Shipped	03/16/2016	4.68	1	4.68

Checked parts: 03/16/2016

2 **3** **4** **5** **6** **7**

Audit Trail 191119-051721499

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
- 1 The Order Details tab allows you to view and process an order. See the customer and shipping details.
- 2 View the part details such as the Part Number, Description, Status and Price. Select the checkbox for the parts you want to process.
- 3 Change the status of checked parts and select a date. To add more parts to the order, click Add Part.
- 4 Ensure Order Manager is connected to the Infomedia DMSi.
- 5 Click the  icon to print an order or email a status update to your customer.
- 6 View order notes from your customers.
- 7 Transfer the parts directly to your DMS. You can also save an order at any time.

SETTINGS

The Settings screen is used to enable new order notifications by email and to set up integration with your DMS.

The screenshot shows the 'ORDER MANAGER' application window. The left sidebar contains 'Settings', 'Trade Account Setup', and 'About'. The main area is titled 'Settings' and has 'Cancel', 'Save', and 'Edit' buttons. It is divided into two sections: 'Notifications' and 'DMSi Integration'. The 'Notifications' section includes a 'Yes' toggle for 'Enable email notifications', an 'Email language' dropdown set to 'English', and a list of 'Notification recipient' email addresses with an 'Add' button. The 'DMSi Integration' section includes a 'Test Connection' button, an 'Advanced' tab, a 'DMSi Integration Type' dropdown set to 'Local', and an 'Available Connections' dropdown set to 'Microcat EPC [Manufacturer]: DMS Connection'. Numbered callouts 1 through 4 point to specific UI elements: 1 points to the menu icon in the top right, 2 points to the 'Edit' button, 3 points to the 'Add' button in the notification list, and 4 points to the 'DMSi Integration' section header.

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- 1 Click the  icon to go to the Settings screen.
- 2 Click **Edit** to enter your settings, and then click **Save**.
- 3 Enable the email notifications using the Yes switch and enter the email address. You can enter multiple email addresses.
- 4 Select your **DMSi Integration Type** and choose from the **Available Connections**.

The DMSi Integration Settings used in Order Manager must match the Integration Settings used in Microcat EPC.

For DMS integration to operate with Order Manager the Infomedia DMSi must be installed and configured to integrate with Microcat EPC.