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.

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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.

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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.


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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.

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SETTINGS

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

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.

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