

ORDER MANAGER - DMS 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.

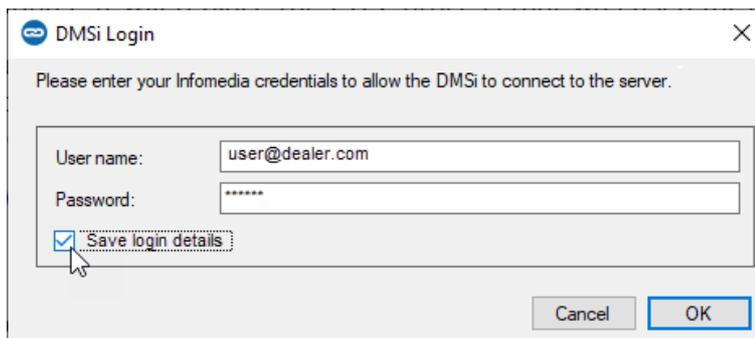
Install the DMSi application

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



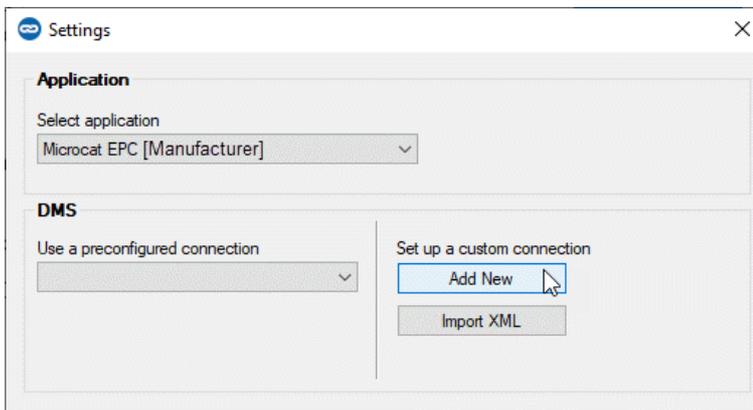
- ▶ To check your DMSi settings at any time, right-click the Infomedia DMSi 8  icon on your Windows taskbar and select **Settings**.

Set up a new DMS connection

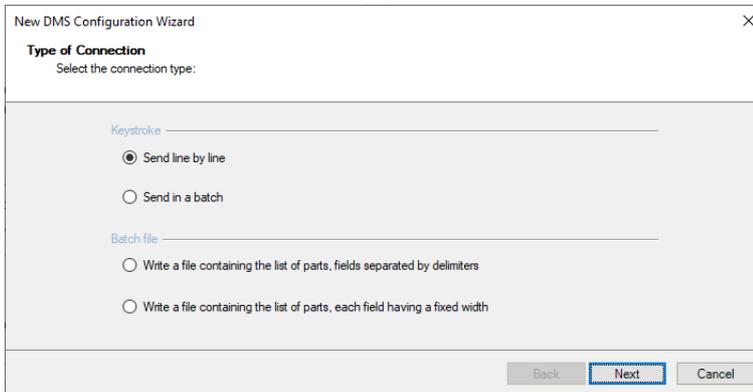
The Infomedia DMSi allows you to add customised DMS connections. Order Manager currently supports keystroke and batch file integration types.

To add a custom DMS connection for Order Manager:

- 1 Right-click the  icon on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select your Microcat EPC product from the **Application** drop-down menu.
- 4 Click **Add New** in the Custom connection frame.



- 5 Select a **Keystroke** or **Batch file** connection and click **Next**.



- 6 Complete the required settings for the connection.

For more information on the setup of keystroke and batch file connections, refer to the DMS Integration Guide in the Microcat EPC Help menu.

- 7 Once you have completed the settings, click **Next**.
- 8 Type a name for the DMS connection and click **Finish**.
- 9 Click **OK**.

Set up the DMSi integration in Order Manager

Once the DMSi is installed, you need to configure the DMSi settings within Order Manager.

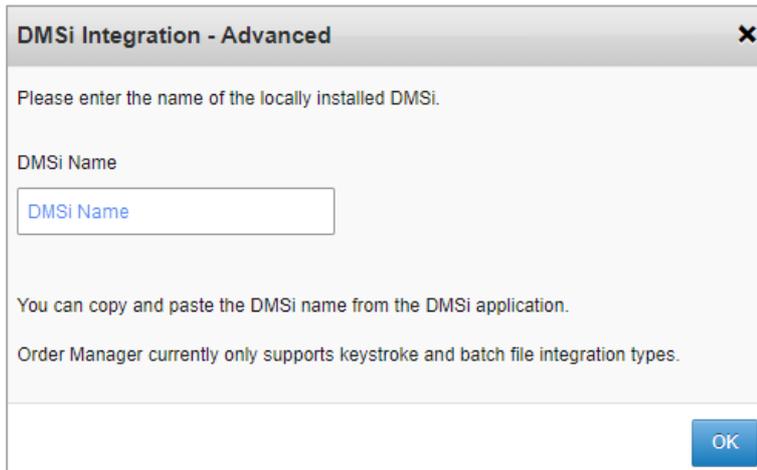
To set up the DMSi integration within Order Manager:

- 1 Access Order Manager, click the  icon to open the Settings window.
- 2 Click **Edit**.
- 3 Select your DMS connection from the **Available Connections** drop-down.



- 4 If your connection is not listed, go to the DMSi application and click **Copy** next to the **DMSi Name** field in the Integration Settings window.

In Order Manager, click **Advanced** in the DMSi Integration section and paste the name into the **DMSi Name** field.



- 5 Click **OK**.

You are now ready to transfer parts to your DMS.

- ▶ For more information on DMS integration, refer to the DMS Integration Guide within the Help menu of Microcat EPC.

Transfer parts to the DMS

You can transfer parts information from Order Manager to your DMS.

To transfer parts from Order Manager to the DMS:

- 1 In Order Manager, open an order.
 - 2 Select the checkbox for the parts you wish to transfer.
 - 3 Click .
 - Keystroke: In the Transfer List window, select each part and click **Transfer**.
 - Batch file: The parts will be transferred in a batch file. Any existing file will be overwritten.
- ▶ For more information on DMS integration, contact Customer Service:
<https://www.infomedia.com.au/contact/customer-support>.