

DMS INTEGRATION GUIDE – FILE TRANSFER

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

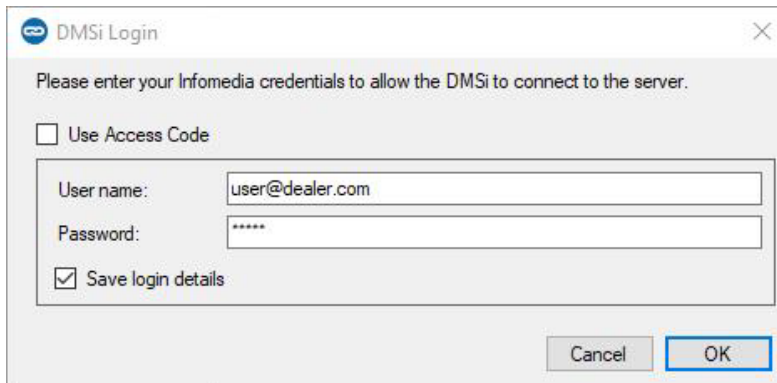
Install the DMSi application

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.

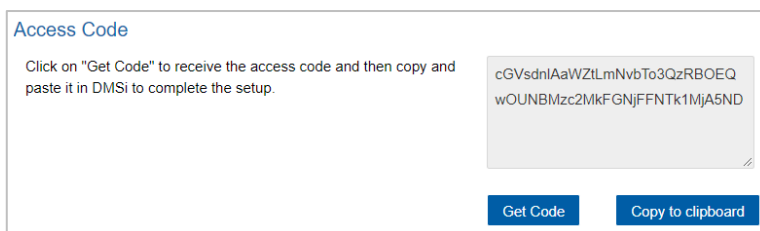
The Infomedia DMSi requires the Microsoft .NET Framework (latest version) and will automatically include the Microsoft .NET Framework in the DMSi installation, if required.

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



- ▶ If you use Single Sign-On (SSO) to log into Superservice Menus, select the **Use Access Code** checkbox and paste the access code into the **Access Code** box. You can get the access code from the **Integration Settings** screen in Superservice Menus.





Set up the DMSi integration in Superservice Menus

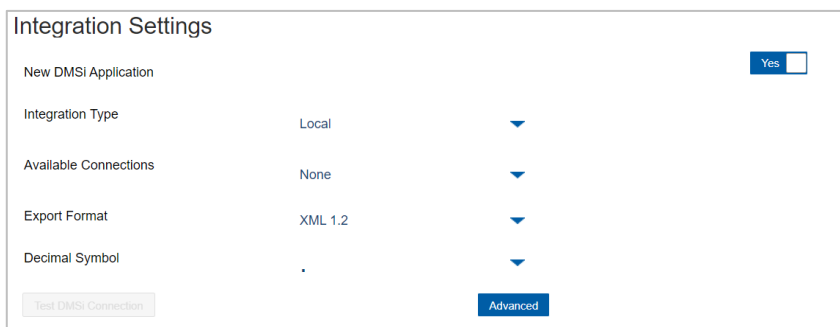
Once the DMSi is installed, you need to check and configure the DMSi settings within Superservice Menus.

All DMSi connections will be displayed in the Available Connections drop-down in the Integration Settings screen in Superservice Menus. You must confirm 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.



Integration Settings

New DMSi Application Yes

Integration Type Local

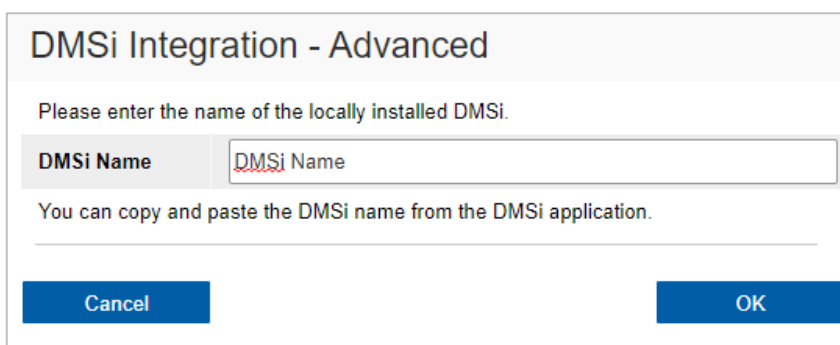
Available Connections None

Export Format XML 1.2

Decimal Symbol .

If your connection is not listed, click Advanced and enter your DMSi name, then click OK.

You can copy your DMSi name from the Integration Settings screen in the DMSi application.




DMSi Integration - Advanced

Please enter the name of the locally installed DMSi.

DMSi Name

You can copy and paste the DMSi name from the DMSi application.

- 6 Click **Save**.
- 7 Close the Settings window.
- 8 Click  to ensure a successful connection with the DMSi.




You are now ready to transfer orders to your DMS.

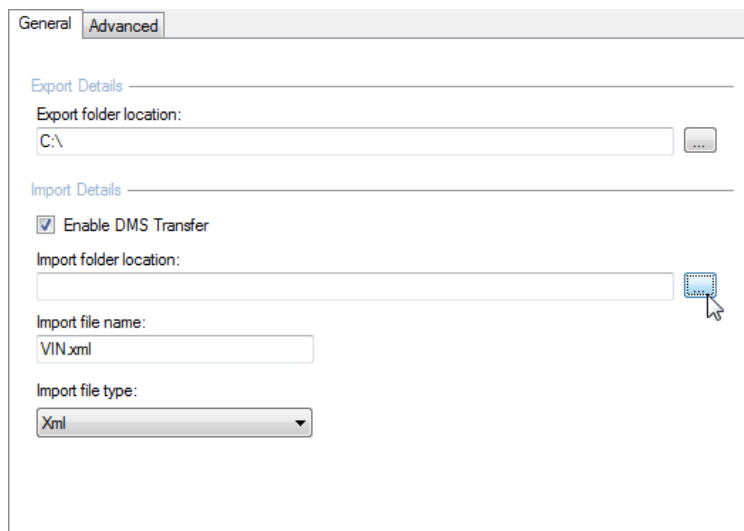
- ▶ For information on installing the DMSi for a server, refer to the DMSi Server Installation Guide.

Set up a file transfer connection


A file transfer connection allows you to export parts and service information into a file, which can then be imported into your DMS. The file format can be TXT or XML.

To add a DMS connection for a file transfer 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 **Application** drop-down menu.
- 4 Select Superservice Menus – File Transfer 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** in the DMS frame.
- 7 Click  on the **Export folder location** field and navigate to the directory where Superservice Menus will create the file for the DMS, and then click **OK**.
- 8 If you want to import files from your DMS, select the **Enable DMS transfer** checkbox.
- 9 Click  on the **Import folder location** field and navigate to the directory where the DMS will create the file for Superservice Menus, and then click **OK**.

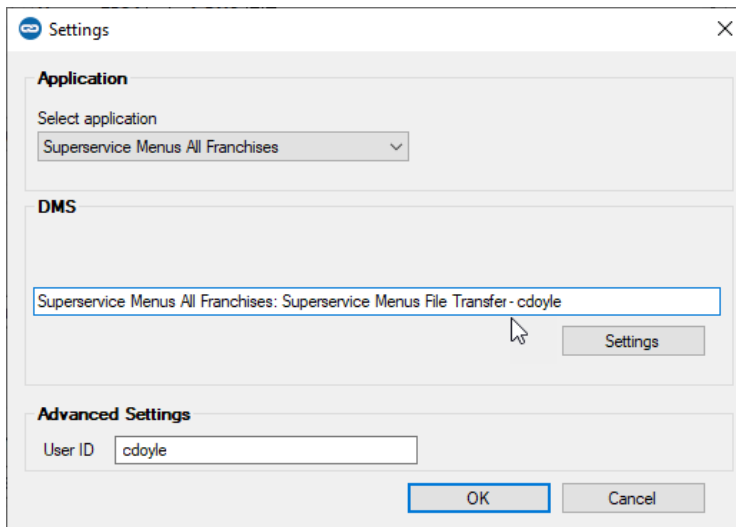


The screenshot shows the 'Advanced' tab of a settings dialog. Under 'Export Details', the 'Export folder location' is 'C:\'. Under 'Import Details', the 'Enable DMS Transfer' checkbox is checked. The 'Import folder location' is empty. The 'Import file name' is 'VIN.xml' and the 'Import file type' is 'Xml'.

- 10 Type or edit the file name in the **Import file name** field.
 - 11 Select the file type from the **Import file type** drop-down menu.
 - 12 Click **OK**.
- ▶ To check your DMSi settings at any time, right-click the Infomedica DMSi 8  icon on your Windows taskbar and select **Settings**.

To name and complete the DMS configuration:

- 1 Confirm or change the DMS connection name.



The screenshot shows a 'Settings' dialog box with three sections: 'Application', 'DMS', and 'Advanced Settings'. In the 'Application' section, a dropdown menu is set to 'Superservice Menus All Franchises'. In the 'DMS' section, a text field contains 'Superservice Menus All Franchises: Superservice Menus File Transfer - cdoyle'. In the 'Advanced Settings' section, a text field for 'User ID' contains 'cdoyle'. There are 'Settings', 'OK', and 'Cancel' buttons.

- 2 Confirm or change the User ID.

The User ID will be included in the DMS name and helps to differentiate DMS connections especially for multi-franchise dealers.

- 3 Click **OK**.

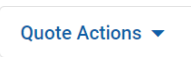
The connection name will be displayed in Integration Settings within the DMSi.

Transfer service information to your DMS

You can transfer parts or service information in a file from Superservice Menus to your DMS.

Ensure the file transfer connection is selected in the Available Connections drop-down in the Integration Settings screen within Superservice Menus.

To transfer parts and service information to your DMS:

- 1 Start your DMS.
 - 2 Open the order in your DMS that you want to transfer the data to.
 - 3 In Superservice Menus, select a service operation or repair and click **Add to Quote**.
 - 4 Confirm the details of the quote.
 - 5 Click the  drop-down menu and select **Transfer** and then select **DMSi**.
The parts and service information will be transferred. Any existing file will be overwritten.
 - 6 Follow your usual process to import the file into your DMS (if required).
- For more information on DMS integration, contact Customer Service:
<https://www.infomedia.com.au/contact/customer-support>.