DMS INTEGRATION GUIDE

Microcat Partsbridge 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 DMSi, 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 and log into the Infomedia DMSi:

- 1 Click the 🍄 icon in Microcat Partsbridge and select Add-Ons.
- Click **Install** next to the Auto Partsbridge DMSi.
 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 Click **Get Code** to display the access code and click **Copy**.
- 6 When the DMSi Login window appears, click the **Use Access Code** checkbox.
- 7 Right click and select **Paste** to paste the access code into the **Access Code** box.
- 8 Click the **Save login details** checkbox and click **OK**.

🗢 DMSi Login				
Please enter your Infomedia credentials to allow the DMSi to connect to the server.				
Use Access Code Method				
Access Code:	YXBiLWhvbmRhLWNhLTEyODI0NzYuYXBiX2Rtc2k6MDIzRUZENiq40 DFCMkM4NjEyMTUwRTh			
Save login details				
	Cancel 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 the DMSi integration in Microcat Partsbridge

Once the DMSi is installed, you need to check and configure the DMSi settings within Microcat Partsbridge.

All DMSi connections will be displayed in the Available connections drop-down in the Add-Ons window. You must confirm the required connection is selected.

To set up the DMSi integration within Microcat Partsbridge:

- 1 Access Microcat Partsbridge, click the 🍄 icon and select **Add-Ons**.
- 2 Select the **Enable Integration** checkbox.
- 3 Confirm **Local** is selected from the **DMS Integration** drop-down.
- 4 Select your DMS connection from the **Available connections** drop-down.

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

+ Add-Ons		×
Please install the a	add-ons below to ensure that Auto PartsBridge works properly.	
Auto PartsBr	idge DMSi	
	Auto Partsbridge DMSi allows you to transfer items directly to your Dealer Management System. This enables the automatic transfer of p numbers quantities and pricing to your DMS.	part 🗿 Install
	Click on "Get Code" to receive the access code and then copy and pait in DMSi to complete the setup.	aste
• Get Code	Access Code	Сору
🗸 Enable Integ	ration	
DMS Integration	•	
Available Connec	tions dge All Franchises: DMS Connection	•
<u>e</u>		Test Connection

5 Click **Test Connection**, if required.

The DMSi icon $\frac{1}{2}$ will display as green $\frac{1}{2}$ when the connection is successful.

6 Close the Settings window.You are now ready to transfer parts to your DMS.



Transfer parts to the DMS

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

To transfer parts from Microcat Partsbridge to the DMS:

- 1 In Microcat Partsbridge, finalise your order.
- 2 Click Transfer to DMS in the Estimate tab.

The first time you click Transfer, you will be prompted to launch your DMS.

MICROCAT. Partsbridge Order Manager Reports					Infomedia Dealership 🕜 🔅
Gack to Order List Estimate 110249-982737 - H-450 Sedan 08 (LMNOPORSTU98	(6543)				
PO Number Last Update Body shop R031248 08/19/2020 Future Motors C	ollision Centre	Insurer The Insurance Co.		1 More Information ∨	Close
Estimate Parts Catalog					(Notes Vark as Invoiced
				Select All (6) AM Part (4) OEM Part (3	2) Other (0) Select Batch Action
# PR Part	Technical Information Type	Quantity Cost Price	Retail	Est. Price Sell Price Est. Rebate Marg	gin %
> 1 11111-11111 COVER, FRONT BUMPER [PAINT REQ.]	DEM P	art – 1 + \$235.73	\$392.10	\$392.10 \$ 313.68 24	I.85% Invoiced #777-777
> 2 22222-22222 HEADLAMP ASSY, RH	AM Par	t – 1 + \$223.50	\$371.76	\$925.00 \$ 297.41 24	1.85% Order Quote Do Not Order
□ → 3 33333-33333 HEADLAMP ASSY, LH	AM Par	t – 1 + \$223.50	\$371.76	\$925.00 \$ 297.41 24	1.85% Order Quote Do Not Order
> 4 4444-4444 RADIATOR ASSY [TOWING PACKAGE-FOR 3500LBS]	OEM P	art – 1 + \$316.70	\$526.78	\$526.78 \$ 421.42 24	1.85% Invoiced #777-777
→ 5 PR 55555-55555 FENDER SUB-ASSY, FRONT RH	AM Par	t – 1 + \$192.37	\$319.99	\$245.00 \$220.00 \$35.99 12	.56% Order Quote Do Not Order
□ > 6 PR 66666-66666 FENDER SUB-ASSY, FRONT LH	AM Par	t – 1 + \$192.37	\$319.99	\$245.00 \$220.00 \$35.99 12	2.56% Order Quote Do Not Order
Add Part					
Show entire estimate Cost Price \$1384.17 Est. Rebate \$71.98	Margin % 20.75%	Margin Amount \$457.73 Gra	nd Total \$17	69.92 👵 Cancel Save A	workive Transfer to DMS Send Quote

- 3 In the Transfer List window, select each part and click **Transfer**.
- 4 Obtain the invoice number from your DMS for each line item in Microcat Partsbridge. The invoice number entered in Partsbridge must match the invoice number in your DMS.
- 5 Type the invoice number from your DMS into the **Invoice Number** field.
- 6 Click the **Apply to all/Apply to empty lines** drop-down.
- 7 Click Save.
- For more information on the invoice matching process, refer to the Dealer Invoicing Guide within the application.



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 \bigcirc icon on the Windows taskbar and select **Settings**.
- 2 Click Add New.
- 3 Select Auto Partsbridge All Franchises 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 \square icon on the Windows taskbar and select **Settings**.
- 2 Click Add New.
- 3 Select Auto Partsbridge All Franchises 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.

General	Transfer	Enquiry	Advanced
Select	application		
	Configure		
		63	
Applica	tion details		
Applic	ation path		
Comm	and line an	numents:	
		gumento.	
Windo	w title:		

- 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 **Advanced** tab, you can select additional window or transfer options.
- 9 Once you have completed the settings, click **Next**.
- 10 Type a name for the DMS connection and click **Finish**.
- 11 Click OK.
- For more information on DMS integration, contact Customer Service: <u>https://www.infomedia.com.au/contact/customer-support</u>.

