



DMS Integration Guide

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Introduction

This guide is designed to assist users to integrate Infomedia products with their Dealer Management System (DMS). The ability to transfer parts and service information directly to your DMS saves time, reduces errors and streamlines operations within your dealership.

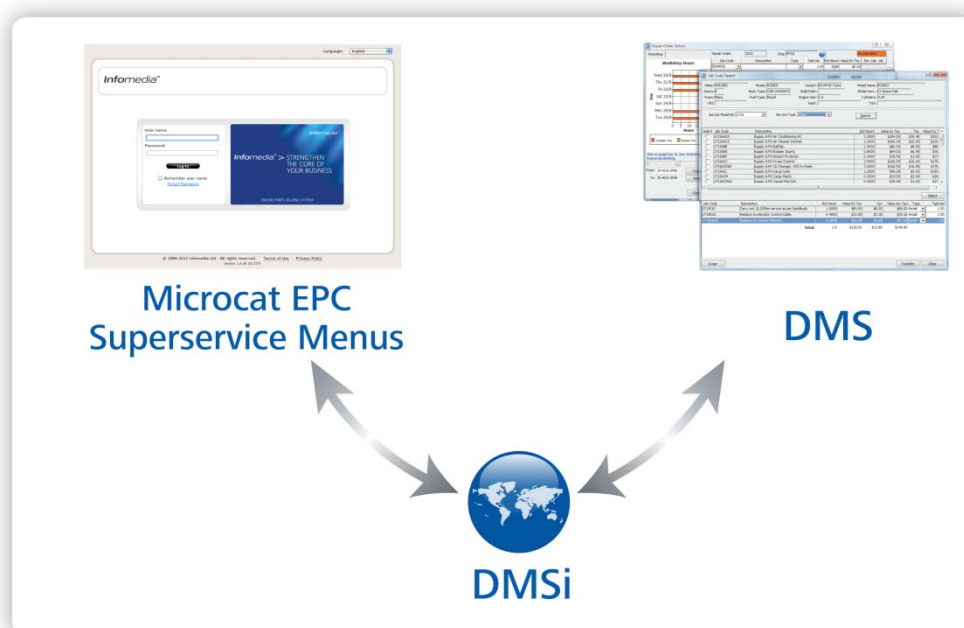
The DMSi is a separate application that links Infomedia products to the DMS. For line by line (keystroke) connections, the DMSi will only support connections to DMS applications running on the same computer as the DMSi. Where dealerships are using advanced integration protocols such as MMP and batch file, the DMSi application can be configured on a server to support multiple user connections.

The DMSi can be used with the following Infomedia products:

- Microcat LIVE / Microcat V6
- Superservice Menus

This guide is divided into the following sections:

- Installing the Infomedia DMSi
- Setting up a new DMS connection
- Working with keystroke connections
- Working with batch file connections
- Working with Microcat Messaging Protocol (MMP) connections
- Managing integration settings



► Throughout this Guide, all references to Microcat LIVE are also applicable to Microcat V6.

Install the Infomedia DMSi

The Infomedia DMSi must be installed and configured to enable the integration between Infomedia products and the DMS.

The Infomedia DMSi application requires the installation of the Microsoft .NET framework (latest version). If the Microsoft .NET framework is not installed on your system, the Infomedia DMSi will automatically install it.

To install the Infomedia DMSi:

- 1 Download the latest version of the DMSi from the Infomedia Landing page.
- 2 Open and extract the installation package.
- 3 Double click the **Setup.exe**.
- 4 Follow the installation steps of the wizard.


Set up a new DMS connection

The Infomedia DMSi allows you to add either preconfigured or customised DMS connections. The DMSi can also be configured to operate connections for multiple Infomedia applications using the multi-user, multi-application settings.

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 connection frame.


To add a preconfigured DMS connection:

- 1 Right click the  icon on the Windows taskbar and select **Settings**.
 - 2 Click **Add New**.
 - 3 Select the application from the **Application** drop-down menu.
 - 4 Select your DMS from the **Use a Preconfigured connection** drop-down menu.
 - 5 Click **OK**.
- ▶ For assistance with establishing the specifications that are applicable to your DMS, contact your DMS provider.
 - ▶ For assistance with integrating Infomedia products to your DMS, contact Customer Service.

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:

- 1 Right click the  icon on the Windows taskbar and select **Settings**.
 - 2 Click **Add New**.
 - 3 Select from the **Application** drop-down menu.
 - 4 Click **Add New** in the Custom connection frame.
 - 5 Select the DMS connection type:
 - **Keystroke**: Enables the transfer of parts or service information directly to the DMS by replicating the keystrokes that would be used to manually enter the data.
 - **Batch file**: Allows parts or service information to be written to a batch file, which can then be imported into the DMS.
 - **Microcat Messaging Protocol (MMP)**: A two-way messaging protocol that enables Microcat LIVE to both transmit information to, and receive data from, the DMS.
 - 6 Enter the settings for the DMS connection type.
 - 7 Once you have completed the settings, click **Next**.
 - 8 Type a name for the DMS connection and click **Finish**.
 - 9 Click **OK**.
-
- ▶ To configure DMS integration for multiple applications, refer to the Configure the DMSi for multiple applications section of this document.
 - ▶ Refer to the relevant section of this Guide for more information on the specific settings for each type of DMS connection.

Configure the DMSi for multiple applications

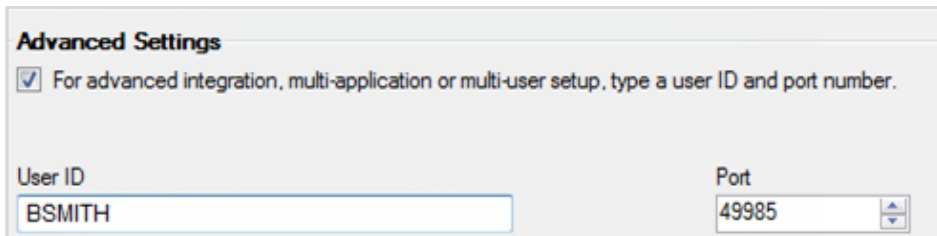
The DMSi can be configured to support connections from multiple Infomedia applications, such as multi-franchise versions of Microcat LIVE and Superservice Menus. You need to enter a user ID and unique port number for each user and then add this information into the appropriate settings area of each Infomedia application.

For line by line (keystroke) connections, the DMSi will only support connections to DMS applications running on the same computer as the DMSi. Where dealerships are using advanced integration protocols such as MMP and batch file, the DMSi application can be configured on a server to support multiple user connections.

To configure the DMSi for multiple applications:

- 1 Add a new preconfigured or customised connection as described above or access the settings of an existing DMS connection.
- 2 Select the **Advanced Settings** checkbox and type a user ID and port number.

The port number must be unique to every user/application combination. Each port number which has been assigned to a user must be entered into the corresponding Infomedia application.



Advanced Settings

☒ For advanced integration, multi-application or multi-user setup, type a user ID and port number.

User ID: BSMITH

Port: 49985

- 3 Click **OK**.
- 4 Add additional connections as required.

To configure the user's Infomedia application:

- 1 Log on to Infomedia application on the user's PC.
- 2 Access the Settings window in the Infomedia application.
 - Microcat LIVE: Click **Settings** > **Integration Settings**.
 - Superservice Menus: Click **Settings** > **Technical Settings** > **DMS Settings**.
- 3 Enter the same port number that was entered into the DMSi.
- 4 Close the Settings window.

Work with keystroke connections

A keystroke connection allows Infomedia products to transfer parts or service information directly to the DMS. The information is transferred using the same keystrokes that would be used to manually enter the information into the DMS.


The following types of keystroke connections can be configured:

- **Line by line:** Transfers parts or service information to the DMS one line at a time.
- **Batch:** Transfers parts or service information to the DMS in a single batch.

Create a keystroke connection

A keystroke connection contains the settings necessary for integration with the DMS.

To create a keystroke connection:

- 1 Right click the  icon on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select from the **Application** drop-down menu.
- 4 Click **Add New** in the Custom connection frame.
- 5 Select the required type of keystroke connection (line by line or batch).
- 6 Click **Next**.

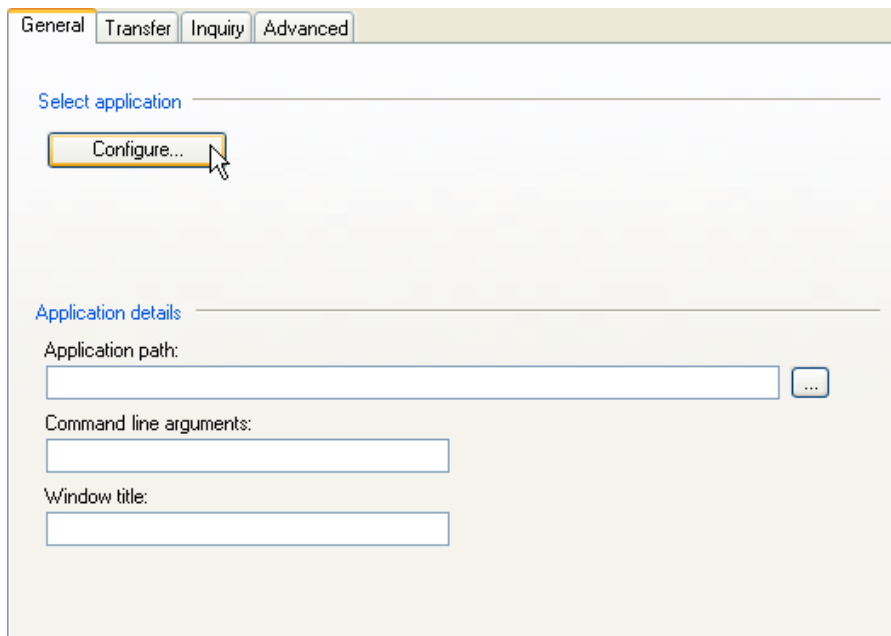
The **Keystroke Settings** wizard will be displayed, with the **General** tab selected. Each tab within the wizard allows different settings to be configured.

Configure the DMS application

The name and location of the DMS must be specified. The application details can be typed directly into the General tab, or configured using the Configure button.

If the DMS is currently running (recommended):

- 1 Click **Configure**, and select **Yes**.



- 2 Select the DMS from the list of running applications.
- 3 Click **Next**, and confirm the application details are correct.
- 4 Click **Finish**.

The DMS application details will be populated in the **General** tab.

If the DMS is not currently running:

- 1 Click **Configure**, and select **No**.
- 2 Click **Next**, and enter the details of the DMS in the appropriate fields:
 - **Application path:** Click **Browse** and navigate to the DMS application.
 - **Command line arguments:** Type any additional parameters required to launch the DMS. For example, to launch a specific screen within the application, or to invoke a specific function.
 - **Window title:** Type the text that appears in the window title of the DMS. Clicking **Launch to Retrieve** will launch the DMS specified in the application path and automatically retrieve the window title.
- 3 Click **Finish**.

The DMS application details will be populated in the **General** tab.

Program the transfer sequence

The transfer sequence determines how each line on the Order List will be sent to the DMS. The sequence specifies what fields will be transferred, the order they will be transferred in, and what delimiters (for example, tabs or commas) will be used to separate them. For batch connections, a header and a footer sequence are added to the start and the end of the transfer.

To program the transfer sequence (line by line):

- 1 Click the **Transfer** tab.

A default sequence will be displayed in the **Transfer Sequence** list. The **Example** field displays an example of the sequence as it would transfer to the DMS.

The screenshot shows a software window with four tabs: General, Transfer, Inquiry, and Advanced. The 'Transfer' tab is active. Below the tabs, there is a section titled 'Add sequence' with a grid of buttons: Number, Quantity, Description, Text, Return, Line feed, Tab, Comma, Delay, Date and Time, and Advanced. Below this is a 'Transfer sequence' section with a list box containing the following items: Number, Return, Quantity, Return. To the right of the list box are buttons for Edit, Clear, Move Up, Move Down, and Clear All. At the bottom, there is an 'Example' field displaying the sequence: 4454116{Return}1{Return}.

- 2 If the default sequence does not match the keystrokes required to enter parts or service information in your DMS, a new sequence can be programmed. See Using the Sequence Programmer.

To program the transfer sequence (batch):

- 1 Click the **Transfer** tab.

A default sequence will be displayed in the **Transfer Sequence** list. The **Example** field displays an example of the sequence as it would transfer to the DMS.

The screenshot shows a software window titled 'Transfer' with four tabs: General, Transfer, Inquiry, and Advanced. The 'Transfer' tab is active. Inside, there are three sub-tabs: Header, Line Item, and Footer. The 'Header' sub-tab is selected. The window is divided into two main sections. The top section, 'Add sequence', contains a grid of buttons: VIN, Rego No., Customer name, Account number, Text, Return, Line feed, Tab, Comma, Delay, Date and Time, and Advanced. The bottom section, 'Transfer sequence', features a large empty text box on the left and a vertical stack of buttons on the right: Edit, Clear, Move Up, Move Down, and Clear All. At the bottom left, there is an 'Example:' label followed by a small text input field.

- 2 In the **Header** tab, program the header sequence that will occur at the start of the transfer. For example, to instruct the DMS to accept a batch file, or to add customer details to an invoice.
- 3 Click the **Line Item** tab and amend the default transfer sequence as required.
- 4 Click the **Footer** tab and program the footer sequence that will complete the transfer.

Each sequence (header, line item and footer) is programmed using the sequence programmer. See Using the sequence programmer.

Using the sequence programmer

Each sequence can be amended or programmed using the following actions:

- Reposition or remove fields from the sequence
- Add common fields and delimiters to the sequence
- Add advanced fields and delimiters to the sequence

Reposition or remove fields

Fields and delimiters within the sequence can be repositioned or removed as required.

To adjust the sequence:

- 1 Select the item in the **Transfer Sequence** list.
- 2 Click **Move Up** and **Move Down** to reposition the line in the list.
Or, click **Clear** to remove the selected item from the list.

To remove all items from the list, click **Clear All**.

Add common fields

The most commonly used fields and delimiters are contained in the Add Sequence frame.

To add common fields to the sequence:

- 1 Click the required button in the **Add Sequence** frame.

- 2 If prompted, enter additional information in the **Advanced** window. For example:
 - **Text:** Type the required text in the freeform entry field.
 - **Delay:** Type the number of milliseconds the delay is to consist of.

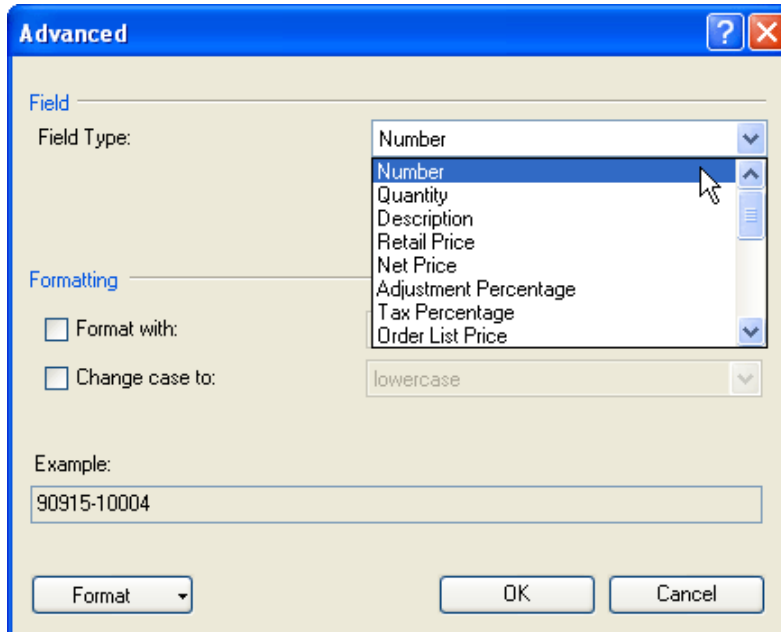
The field or delimiter will be added to the transfer sequence.

Add advanced fields

Additional fields such as pricing, vehicle and customer details are available in the Advanced window. The fields available will depend on the type of sequence being programmed.

To add advanced fields to the sequence:

- 1 Click **Advanced**.
- 2 Select the type of field from the **Field Type** drop-down menu.



- 3 Enter additional information depending on the type of field. For example:
 - **Number:** Select how each section of the part number will be separated, and/or whether characters must appear in upper or lower case.
 - **Special Key:** Select a combination of keys using the checkboxes and drop-down menu. For example, Shift+F5.
- 4 If you wish to apply a fixed width to the field, click **Format**.
- 5 Select the **Fixed Width Of** checkbox, and type the number of characters the field is to consist of.
- 6 Select whether additional characters should be inserted to the left or right when required, and what characters should be inserted.
- 7 Click **OK** to close the **Field Layout** window.
- 8 Click **OK** to close the **Advanced** window.

Program the Inquiry sequence

An additional sequence can be programmed and used to inquire on whether parts are available in the DMS.

To program the inquiry sequence:

- 1 Click the **Inquiry** tab.

A default sequence will be displayed in the **Transfer Sequence** list.

The screenshot shows a software window with four tabs: General, Transfer, Inquiry, and Advanced. The 'Inquiry' tab is selected and highlighted with a mouse cursor. Below the tabs, there are two main sections. The first section, titled 'Add sequence', contains a grid of buttons for selecting sequence elements: Number, Quantity, Description, Text, Return, Line feed, Tab, Comma, Delay, Date and Time, and Advanced. The second section, titled 'Transfer sequence', contains a text box with the default sequence 'Number', 'Return', 'Quantity', and 'Return' listed vertically. To the right of this text box are five buttons: Edit, Clear, Move Up, Move Down, and Clear All. At the bottom of the window, there is an 'Example:' label followed by a text box containing the sequence '4454116{Return}1{Return}'.

- 2 Amend the default sequence as required. See Using the sequence programmer.

Select Advanced settings

Advanced settings can be applied to the configuration to assist the way the information is transferred to the DMS. Different settings will be selected by default depending on the type of connection.

To apply advanced settings:

- 1 Click the **Advanced** tab.

- 2 Select or de-select the following settings as required:
 - **Exact match on window title, ignoring case:** The window title of the DMS must exactly match the text entered in the Window Title field of the General tab ignoring upper and lower case.
 - **Exact match on window title:** The window title of the DMS must exactly match the text entered in the Window Title field of the General tab.
 - **Window orientation:** Enables the Transfer List window to be displayed beneath the DMS screen in landscape view, or to the right of the DMS screen in portrait view. If Custom is selected, the Transfer List window can be resized and repositioned as required, and the settings will be retained.
 - **Send keystrokes using:** If the default method of transfer is not compatible with the DMS, an alternate method can be selected. For example, for DOS based DMS applications.
 - **Delay keystrokes by:** Specifies a delay, in milliseconds, to occur between each keystroke in the sequence.
 - **Initiate transfer automatically:** The data will automatically be transferred to the DMS in a single batch.
 - **Hide transfer list:** The Transfer List window will not be displayed alongside the DMS when transferring information.
 - **Disable the Transfer All action:** The Transfer List window will not display the Transfer All button.

- **Do not launch DMS application:** The DMS application will not be launched automatically.

Complete the configuration

To complete the DMS configuration:

- 1 Click **Next**.
- 2 Type a name for the connection, and click **Finish**.
- 3 Click **OK**.

Use a keystroke connection

Once the DMSi is configured, you can transfer parts or service information from Microcat LIVE or Superservice Menus to your DMS.

Transfer parts or service information to your DMS

To transfer parts information from Microcat LIVE to the DMS:

- 1 Start your DMS.
- 2 In Microcat LIVE, add parts to the Order List.
- 3 Click **Transfer** on the Parts or Orders screen.
- 4 The DMS screen and the Infomedia DMSi Transfer List window will be displayed. The Transfer List window contains all the parts that are on the Order List.

There are two main actions available from the Transfer List window:

- Select a part in the list and click **Transfer** to transfer the part to the DMS. Each part is transferred one line at a time.
- Select a part in the list and click **Inquire** to send an inquiry on the availability of the part to the DMS. The results of the inquiry will be displayed in the DMS.

To transfer service information from Superservice Menus to the DMS:

- 1 Start your DMS.
- 2 Add a service operation or repair to the Quoting and RO System.
- 3 Click **Export**.

The service information will be exported as an xml file.

Work with batch file connections

A batch file connection allows the transfer of information in a batch file, which can then be imported into the DMS.


The following types of batch file connections can be configured:

- **Delimited:** Each field in the transfer sequence is separated by a specified character, such as a tab or a comma.
- **Fixed-width:** The width of each field in the transfer sequence is set to a specified number of characters.

Create a batch file connection

A batch file connection contains the settings necessary for integration with the DMS.

To create a batch file connection:

- 1 Right click the  icon on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select from the **Application** drop-down menu.
- 4 Click **Add New** in the Custom connection frame.
- 5 Select the required type of batch file connection (delimited or fixed width).
- 6 Click **Next**.
- 7 Click **Browse** on the **Folder Location** field.
- 8 Navigate to the directory the file will be created to, and click **OK**.
- 9 Type a name for the file in the **File Name** field.

Program the transfer sequence

The transfer sequence determines how each line on the Order List will be written to the batch file. The sequence specifies what fields will be transferred, the order they will be transferred in, and what delimiters (for example, tabs or commas) will be used to separate them. A header and a footer sequence are added to the start and the end of the transfer.

To program the transfer sequence:

- 1 Click the **Header** tab and program the header sequence that will occur at the start of the transfer. For example, to instruct the DMS to accept a batch file, or to add customer details to an invoice.

The screenshot shows a software window with five tabs: General, Header, Line Item, Footer, and Advanced. The 'Header' tab is selected and highlighted with a mouse cursor. Below the tabs, there are two main sections. The first section, titled 'Add sequence', contains a grid of buttons for selecting fields and delimiters: VIN, Rego No., Customer name, Account number, Text, Return, Line feed, Tab, Comma, Date and Time, and Advanced. The second section, titled 'Transfer sequence', features a large empty text box for entering the sequence, with buttons for Edit, Clear, Move Up, Move Down, and Clear All to its right. At the bottom, there is an 'Example:' label followed by a small text input field.

- 2 Click the **Line Item** tab and program the transfer sequence that will apply to each line item.
- 3 Click the **Footer** tab and program the footer sequence that will complete the transfer.

Each sequence can be programmed using the following actions:

- Add common fields and delimiters to the sequence
- Add advanced fields and delimiters to the sequence
- Reposition or remove fields from the sequence

Add common fields

The most commonly used fields and delimiters are contained in the Add Sequence frame.

To add common fields to the sequence:

- 1 Click the required button in the **Add Sequence** frame.

The screenshot shows a software window titled 'Add Sequence'. It has five tabs: 'General', 'Header', 'Line Item' (which is selected and highlighted in orange), 'Footer', and 'Advanced'. Below the tabs, there are two main sections. The first section, 'Add sequence', contains a grid of buttons: 'Number' (highlighted with a yellow border and a mouse cursor), 'Quantity', 'Description', 'Text', 'Return', 'Line feed', 'Tab', 'Comma', 'Date and Time', and 'Advanced'. The second section, 'Transfer sequence', features a large empty text box on the left and a vertical stack of buttons on the right: 'Edit', 'Clear', 'Move Up', 'Move Down', and 'Clear All'. At the bottom left, there is an 'Example:' label followed by a small text input field.

- 2 If prompted, enter additional information in the **Advanced** window.

The field or delimiter will be added to the transfer sequence.

For fixed width connections, the Advanced window will be displayed automatically when adding a field:

- 1 Type the number of characters the field is to consist of in the **Width** field.
By default, additional characters will be inserted to the left when required, and will consist of spaces.
- 2 To change the default settings, click **Format**.
- 3 Select whether additional characters should be inserted to the left or right when required, and what characters should be inserted.
- 4 Click **OK** to close the **Field Layout** window.
- 5 Click **OK** to close the **Advanced** window.

The field will be added to the transfer sequence.

Add advanced fields

Additional fields such as pricing, vehicle and customer details are available in the Advanced window. The fields available will depend on the type of sequence being programmed.

To add advanced fields to the sequence:

- 1 Click **Advanced**.
- 2 Select the type of field from the **Field Type** drop-down menu.
- 3 For fixed width connections, type the number of characters the field is to consist of in the **Width** field.
- 4 Enter additional information depending on the type of field. For example:
 - **Number:** Select how each section of the part number will be separated, and/or whether characters must appear in upper or lower case.
 - **Character Code:** Type the character code (for example, an ASCII code), that represents the required character.
 - **Blank Field:** Type the number of characters the empty field is to consist of.
- 5 To change the default settings of a fixed width field, or to apply a fixed width to a field within a delimited sequence, click **Format**.
- 6 Ensure the **Fixed Width Of** checkbox is checked, and type the number of characters the field is to consist of.
- 7 Select whether additional characters should be inserted to the left or right when required, and what characters should be inserted.
- 8 Click **OK** to close the **Field Layout** window.
- 9 Click **OK** to close the **Advanced** window.

The field will be added to the transfer sequence.

Reposition or remove fields

Fields and delimiters within the sequence can be repositioned or removed as required.

To adjust the sequence:

- 1 Select the item in the **Transfer Sequence** list.
- 2 Click **Move Up** and **Move Down** to reposition the line in the list.

Or, click **Clear** to remove the selected item from the list.

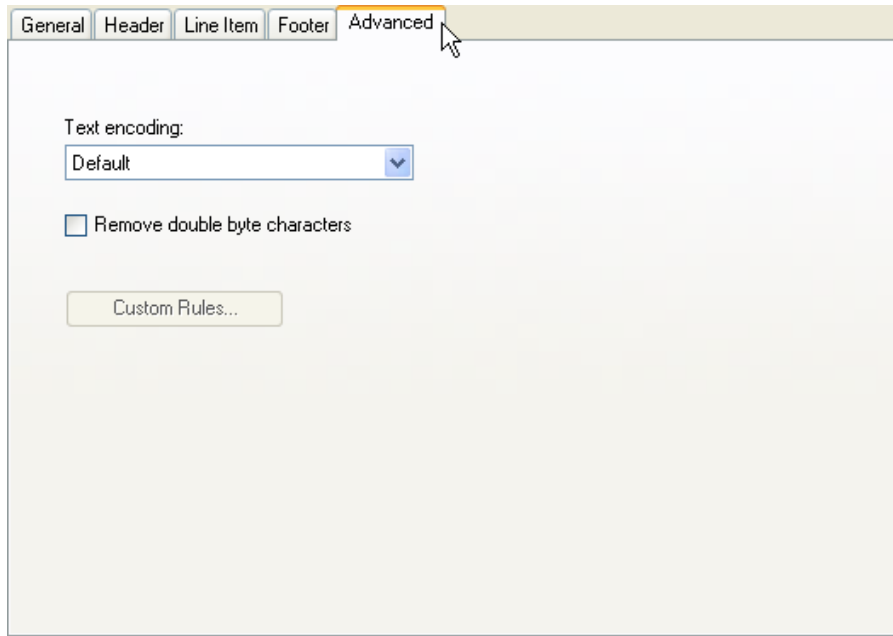
To remove all items from the list, click **Clear All**.

Select advanced settings

Advanced settings can be applied to the configuration to assist the way the information is transferred to the DMS.

To apply advanced settings:

- 1 Click the **Advanced** tab.



- 2 Select the following settings as required:
 - **Text encoding:** By default, the text written to the file will be encoded based on the operating system on which the Infomedia product is hosted. An alternate encoding scheme (for example, Unicode or US-ASCII) may be selected to match the requirements of the DMS.
 - **Remove double byte characters:** Double byte characters will be converted to single byte characters where the encoding (for example, Shift-JIS) allows.

Complete the configuration

To complete the DMS configuration:

- 1 Click **Next**.
- 2 Type a name for the connection, and click **Finish**.
- 3 Click **OK**.

Use a batch file connection

You can transfer parts or service information to your DMS in a batch file.

To transfer parts information from Microcat LIVE to the DMS:

- 1 Start your DMS.
- 2 In Microcat LIVE, add parts to the Order List.
- 3 Click **Transfer** on the Order List.

The parts will be transferred in a batch file. Any existing file will be overwritten.

To transfer service information from Superservice Menus to the DMS:

- 1 Start your DMS.
- 2 Add a service operation or repair to the Quoting and RO System.
- 3 Click **Export**.

The service information will be exported as an xml file.

Work with MMP connections

Microcat Messaging Protocol (MMP) is a two-way messaging system that enables Microcat LIVE to both transmit information to, and receive data from, the DMS. The advanced transfer protocols such as MMP connections are only available for Microcat LIVE.

When using an MMP connection, the DMSi application can be installed locally or configured on a server to support multiple user connections.


The following types of MMP connections can be configured:

- **Connect to server:** Microcat LIVE initiates a connection to the DMS via the TCP/IP protocol.
- **Listen for connections:** The DMS initiates a connection to Microcat LIVE via the TCP/IP protocol, and Microcat LIVE listens for the connection.
- **File transfer:** Microcat LIVE and the DMS communicate by writing and reading messages contained in files.

Create an MMP connection

An MMP connection contains the settings necessary for Microcat LIVE to integrate with the DMS.

To create an MMP connection:

- 1 Right click the  icon on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select from the **Application** drop-down menu.
- 4 Click **Add New** in the Custom connection frame.
- 5 Select the required type of MMP connection.
- 6 Click **Next**.

The **Microcat Messaging Protocol (MMP) Settings** wizard will be displayed with the **General** tab selected. Each tab within the wizard allows different settings to be configured.

- ▶ The advanced transfer protocols such as MMP connections are only available for Microcat LIVE.

Configure the DMS application

The configuration requirements for Microcat LIVE to communicate with the DMS vary depending on the type of connection being established.

Connect to server

To configure the connection details:

- 1 Type the name or IP address of the DMS Server in the **Server** field.
- 2 Type the port number of the DMS server in the **Port** field.

By default, the DMSi and the DMS connect on port 1998.

The screenshot shows a configuration dialog box with two tabs: 'General' and 'Advanced'. The 'General' tab is selected. It contains two sections: 'Connection Details' and 'Specification details'. In the 'Connection Details' section, there is a 'Server:' label followed by a text box containing 'localhost' and a browse button (...). Below it is a 'Port:' label followed by a text box containing '1998'. To the right of the port box is a 'Test Connection' button. In the 'Specification details' section, there is a 'Version:' label followed by a drop-down menu showing 'MMP Specification 1.00.0000 (MMP_01_00_0000)'. To the right of the drop-down menu is a 'Customise Version...' button.

- 3 Click **Test Connection** to test the connection between the DMSi and your DMS.
- 4 Click the drop-down menu on the **Version** field, and select the MMP specification supported by the DMS.

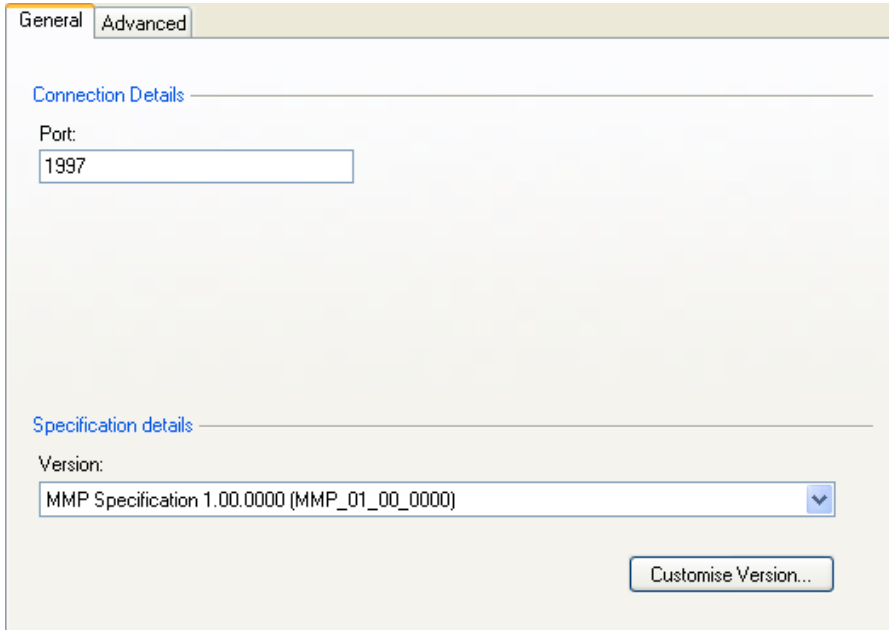
If necessary, properties of the protocol can be customised to make it compatible with the host operating system of the DMS. Click **Customise Version**, and amend the fields as required.

Listen for connections

To configure the connection details:

- 1 Type the port number that Microcat LIVE will use to listen for incoming connections from the DMS in the **Port** field.

By default, the DMSi and the DMS connect on port 1997.

The image shows a configuration window with two tabs: 'General' and 'Advanced'. The 'General' tab is selected. Under the heading 'Connection Details', there is a 'Port:' label followed by a text input field containing the number '1997'. Below this, under the heading 'Specification details', there is a 'Version:' label followed by a drop-down menu. The drop-down menu is open, showing the selected option 'MMP Specification 1.00.0000 (MMP_01_00_0000)'. At the bottom right of the window, there is a button labeled 'Customise Version...'.

General Advanced

Connection Details

Port:

1997

Specification details

Version:

MMP Specification 1.00.0000 (MMP_01_00_0000)

Customise Version...

- 2 Click the drop-down menu on the **Version** field, and select the MMP specification supported by the DMS.

If necessary, properties of the protocol can be customised to make it compatible with the host operating system of the DMS. Click **Customise Version**, and amend the fields as required.

File transfer

To configure the connection details:

- 1 Click **Browse** on the **Import Folder Location** field, and navigate to the directory where the DMS will write the MMP files intended for Microcat LIVE.

- 2 Type the name of the file that will be created by the DMS in the **Import File Name** field.
- 3 Click **Browse** on the **Export Folder Location** field, and navigate to the directory where Microcat LIVE will write the MMP files intended for the DMS.
- 4 Type the name of the file that will be created by Microcat LIVE in the **Export File Name** field.
- 5 Click the drop-down menu on the **Version** field, and select the MMP specification supported by the DMS.

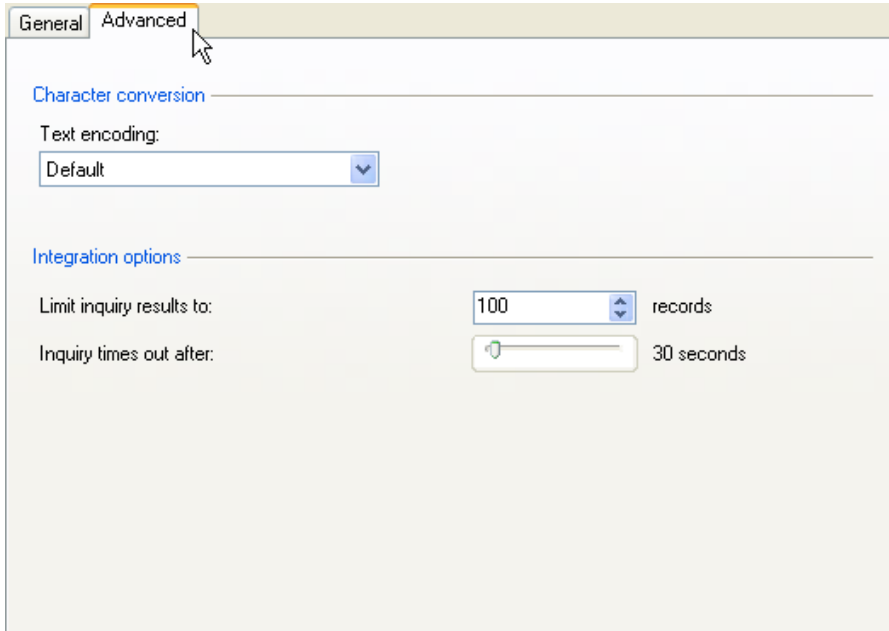
If necessary, properties of the protocol can be customised to make it compatible with the host operating system of the DMS. Click **Customise Version**, and amend the fields as required.

Select advanced settings

Advanced settings can be applied to the configuration to assist the way Microcat LIVE integrates with the DMS.

To apply advanced settings:

- 1 Click the **Advanced** tab.



The screenshot shows the 'Advanced' tab of a configuration window. At the top, there are two tabs: 'General' and 'Advanced', with 'Advanced' being the active tab. Below the tabs, the window is divided into two sections. The first section, titled 'Character conversion', contains a 'Text encoding:' label and a dropdown menu currently set to 'Default'. The second section, titled 'Integration options', contains two settings: 'Limit inquiry results to:' with a numeric input field set to '100' and a unit label 'records', and 'Inquiry times out after:' with a slider control set to '30 seconds'.

- 2 Select the following settings as required:
 - **Text encoding:** By default, the text written to the file will be encoded based on the operating system on which Microcat LIVE is hosted. An alternate encoding scheme (for example, Unicode or US-ASCII) may be selected to match the requirements of the DMS.
 - **Limit inquiry results to:** The number of records the DMS returns will be limited to the specified number.
 - **Inquiry times out after:** Microcat LIVE will wait the specified length of time for a response from the DMS.

Complete the configuration

To complete the DMS configuration:

- 1 Click **Next**.
- 2 Type a name for the connection, and click **Finish**.
- 3 Click **OK**.

Use an MMP connection

Following the initial configuration, the MMP connection will become available in Microcat LIVE and can be used to fully integrate with the DMS.

Use connect to server or file transfer


Connect to server and file transfer connection types can be used to:

- Perform a customer inquiry
- Perform a part inquiry
- Transfer parts to the DMS

It is necessary to log on to the DMS through Microcat LIVE.

Log on to the DMS

To log on to the DMS from Microcat LIVE:



- 1 Click the **Connection** icon  on the status bar.
- 2 Type your user name and password in the appropriate fields.
- 3 Click **Log on to DMS**.

The status bar will now also display the customer inquiry and part inquiry.

To log off from the DMS, click the **Connection** icon .

Customer Inquiry

To retrieve customer details from the DMS:

- 1 Click the **Customer Inquiry** icon  on the status bar.
- 2 Type the customer name or account number in the appropriate field.
- 3 Click the **Search** icon .

The results will be returned from the DMS and the vehicle and customer details will be displayed.

- 4 If more than one customer is returned, double click on the required customer.


A customer inquiry can also be performed by searching on the customer name or account number in the **Orders** screen.

Part Inquiry

To perform a part inquiry on the DMS:

- 1 Click the part description or a callout in the image.
- 2 Click the **DMS** tab in the **Part Data** window.

The results will be returned from the DMS and the part details will be displayed.

A part inquiry can also be performed by using the **Part Inquiry** icon  in the status bar.

Order transfer

To transfer parts to the DMS:

- 1 Add parts to the Order List.
- 2 Click **Transfer** on the Order List.
- 3 If prompted, click **Finalise to DMS** to confirm the transfer.

The parts will be transferred to the DMS.

Use listen for connections

Listen for connections can be used to:

- Retrieve customer details into Microcat LIVE
- Perform a part inquiry
- Transfer parts to the DMS

Customer Inquiry

To retrieve customer details from the DMS:


- 1 From the DMS, initiate a transfer of the customer, VIN or registration details to Microcat LIVE.
The DMS will send the customer and vehicle details to Microcat LIVE.
- 2 Click **Yes** to accept the details from the DMS into Microcat LIVE.

Part Inquiry

To perform a part inquiry on the DMS:

- 1 Click the part description or a callout in the image.
- 2 Click the **DMS** tab in the **Part Data** window.

The part details will be displayed.


A part inquiry can also be performed by using the **Part Inquiry** icon  in the status bar.

Order transfer

To transfer parts to the DMS:


- 1 Add parts to the Order List.
- 2 Click **Transfer** on the Order List.
- 3 If prompted, click **Finalise to DMS** to confirm the transfer.

The parts will be transferred to the DMS.

If you have configured more than one DMS connection, right click the **DMSi** icon , select **Dealer Management System** and click the required connection.

Manage integration settings

DMS connections are maintained in the Integration Settings window. Multiple DMS connections can be set up and will be displayed in the Available connections frame.

To access the Integration Settings window right click the **DMSi** icon  on the Windows taskbar and select **Settings**.

Delete a connection

Connections that are no longer required can be deleted.

To delete a connection:

- 1 Select the required DMS connection.
- 2 Click **Delete**.
- 3 Click **OK** to confirm the deletion.

Edit a connection

Existing DMS connections, including preconfigured connections, can be edited as required.

To edit an existing connection:

- 1 Select the required DMS connection.
- 2 Click **Settings**.

The configuration settings that were selected when the connection was created will be displayed.

- 3 Amend the settings in each tab as required, and click **OK**.

Switch between DMS connections

You can switch DMS connections at anytime using the Integration Settings window.

To switch between DMS connections:

- 1 Select the required DMS connection.
- 2 Click **Start**.

Export or import a connection

DMS connections can be exported or imported in an xml format. This enables DMS connections to be shared across different users.

To export a connection:

- 1 Select the required DMS connection.
- 2 Click **Export**.
- 3 Specify a location to save the file to, and click **Save**.

The DMS connection will be written to an xml file at the specified location.

To import a connection:

- 1 Click **Add New**.
- 2 Select from the **Application** drop-down.
- 3 Click **Import XML**.
- 4 Navigate to the xml file that contains the DMS connection.

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