

DMS Keystroke Integration

Infomedia applications have 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.

The Infomedia DMSi application requires the installation of the Microsoft .NET framework (minimum V3.5). If the Microsoft .NET framework is not installed the Infomedia DMSi will automatically include the Microsoft .NET framework.

Install the DMSi application

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



To add a preconfigured DMS connection for a line by line transfer:

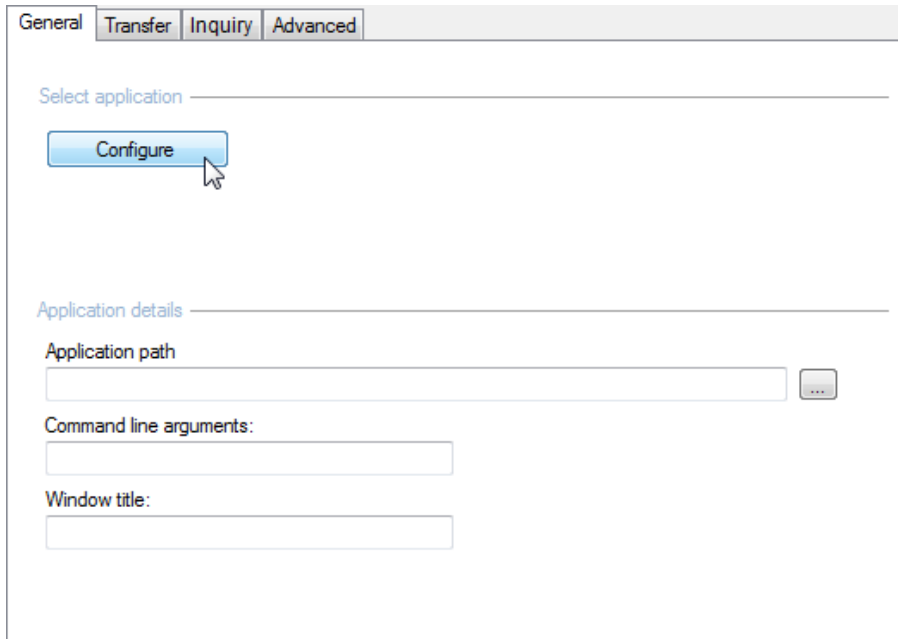
- 1 Right click the  icon on the Windows taskbar and select **Settings**.
 - 2 Click **Add New**.
 - 3 Select the application from the **Application** drop-down menu.
 - 4 Select your DMS from the **Preconfigured connection** drop-down menu.
 - 5 Click **OK**.
- ▶ To configure DMS integration for multiple applications, refer to the Configure the DMSi for multiple applications section of this document.

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  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 **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 Inquiry Advanced

Select application

Configure

Application details

Application path

Command line arguments:

Window title:


- 7 In the **Transfer** tab, the transfer sequence needs to be configured correctly to send items to your DMS. The transfer sequence determines how each line on the Order List will be sent to the DMS.
 - View the transfer sequence in the Transfer Sequence frame. A default transfer sequence will be displayed.
 - Amend the transfer sequence, if required. Click the required buttons in the Add Sequence frame to specify the sequence.

- 8 In the **Inquiry** tab, a transfer sequence can be configured to send an inquiry on the availability of a part to the DMS.
 - View the transfer sequence in the Transfer Sequence frame. A default transfer sequence will be displayed.
 - Amend the transfer sequence, if required. Click the required buttons in the Add Sequence frame to specify the sequence.
- 9 In the **Advanced** tab, you can select additional window or transfer options. For example:
 - **Send keystrokes using:** If the default method of transfer is not compatible with the DMS, an alternative method can be selected.
 - **Disable the Transfer All action:** If you want to disable the Transfer All action, you can select this checkbox.
- 10 Once you have completed the settings, click **Next**.
- 11 Type a name for the DMS connection and click **Finish**.
- 12 Click **OK**.

Change your settings

You can easily change the settings of a DMS connection.

To change the settings of a DMS connection:

- 1 Right click the  icon on the Windows task bar and select **Settings**.
 - 2 Select your DMS in the Available connections frame and click **Settings**.
 - 3 Click **Settings** and make your changes, as required.
For example, change the Window title from DMS to the specific name of your DMS.
 - 4 Click **OK**.
- ▶ To configure DMS integration for multiple applications, refer to the Configure the DMSi for multiple applications section of this document.

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.

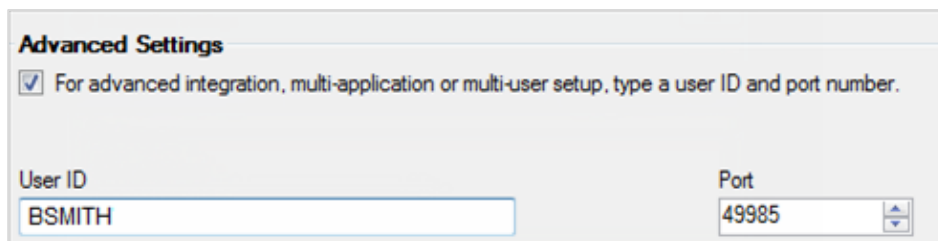
For line by line (keystroke) connections, the DMSi will only support connections to DMS applications running on the same computer as the DMSi. Where dealerships are using advanced integration protocols such as MMP and batch file, the DMSi application can be configured on a server to support multiple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

Transfer parts or service information to your DMS

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

To transfer parts 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 Infomedialogotom 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 parts 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.