



DMS Integration Guide

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Introduction

This guide is designed to assist users to integrate Infomedica 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.

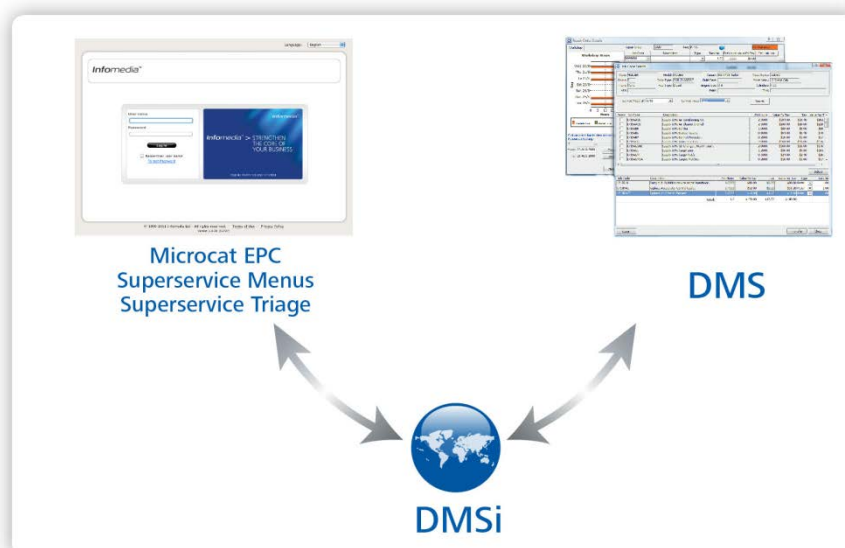
The DMSi is a separate application that links Infomedica products to the DMS. For line by line (keystroke) connections, the DMSi will only support connections to DMS applications running on the same computer as the DMSi. Where dealerships are using advanced integration protocols such as MMP and batch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

The DMSi can be used with the following Infomedica products:

- Microcat LIVE / Microcat V6
- Superservice Menus
- Superservice Triage

This guide is divided into the following sections:

- Installing the Infomedica 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.
- ▶ Throughout this Guide, all references to Superservice Menus are also applicable to Service Menu Pricing and Service Pricing.

Install the Infomedica DMSi

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

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

To install the Infomedica DMSi:

- 1 Download the latest version of the DMSi from the Infomedica 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 Infomedica DMSi allows you to add either preconfigured or customised DMS connections. The DMSi can also be configured to operate connections for multiple Infomedica applications using the multi-user, multi-application settings.


Within Superservice Menus, you need to enable the DMSi integration. To do this, click **Settings** and **Technical Settings** and select XML 1.2 from the **Export Settings** drop-down menu. Then, click the **Integration Settings** tab and select the **Enable DMSi integration** checkbox.

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.

Add a preconfigured DMS connection


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

- 1 Right click the **DMSi** icon  on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select your Infomedica product from the **Application** drop-down menu.
- 4 Select your DMS 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 from DMS to the specific name of your DMS.
 - In the Transfer tab, change each transfer sequence that is used to send keystrokes to your DMS. There may be more than one transfer sequence.
- 7 Click **OK**.

Add a custom DMS connection (Microcat LIVE/Auto PartsBridge)

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 **DMSi** icon  on the Windows taskbar and select **Settings**.
 - 2 Click **Add New**.
 - 3 Select your Infomedia product 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**.
-
- ▶ 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.

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.

The screenshot shows a dialog box titled "Advanced Settings". At the top, there is a checked checkbox with the text "For advanced integration, multi-application or multi-user setup, type a user ID and port number." Below this, there are two input fields. The first is labeled "User ID" and contains the text "cdoyle". The second is labeled "Port" and contains the value "49985".

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

To configure the user's Infomedia application:

- 1 Log on to the 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**.
 - Auto PartsBridge: Click **Settings > Add-Ons**.
- 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 Infomedica 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 in Microcat LIVE:

- 1 Right click the **DMSi** icon  on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select your Microcat LIVE product 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**, and complete the DMS settings, as required.

Each tab allows different DMS settings to be configured.

To create a keystroke connection in Superservice Menus and Superservice Triage:

- 1 Right click the **DMSi** icon  on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select your Superservice product from the **Application** drop-down menu.
- 4 Select the type of keystroke connection (line by line or batch) from the **Use a preconfigured connection** drop-down menu.
- 5 Click **OK**.
- 6 Double click on your new DMS connection in the Available Connections frame.
- 7 Click **Settings** and complete the DMS settings, as required.

Each tab allows different DMS 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**.

The screenshot shows a configuration dialog box with the following elements:

- Tabbed interface: **General** (selected), Transfer, Inquiry, Advanced.
- Section: **Select application** with a text input field and a **Configure** button.
- Section: **Application details** with the following fields:
 - Application path**: A text input field followed by a browse button (...).
 - Command line arguments:**: A text input field.
 - Window title:**: A text input field.

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

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**.

Program the transfer sequence

The transfer sequence determines how each line on the Order List or Job 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 some connection types, a header and footer sequence is added to the start and end of the transfer.

To program the transfer sequence in Microcat LIVE:

- 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 the 'Transfer' tab selected in the Microcat LIVE interface. The 'Add sequence' section contains buttons for 'Number', 'Quantity', 'Description', 'Text', 'Return', 'Line feed', 'Tab', 'Comma', 'Delay', 'Date/Time', and 'Advanced'. The 'Transfer sequence' list shows 'Number', 'Return', 'Quantity', and 'Return'. The 'Example' field displays '222262G000{Return}1{Return}'.

- 2 If you wish to change the transfer sequence, click the required buttons in the Add sequence frame.

Or, select an item in the Transfer sequence list and click **Edit**.


- ▶ You can click **Clear** to delete a selected item or **Clear All** to delete an entire sequence.
- ▶ To program an additional transfer sequence, such as whether parts are available in the DMS, you can use the **Inquiry** tab.

To program the transfer sequence in Superservice Menus and Superservice Triage:

- 1 Click the **Transfer** tab.

A default sequence may 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 interface for configuring a transfer sequence. At the top, there are three main tabs: 'General', 'Transfer', and 'Advanced'. The 'Transfer' tab is selected, and it contains several sub-tabs: 'Header', 'Operation Items', 'Job Items', 'Part Items', 'Sundry Items', 'Sublets', 'Symptom Item', and 'Not'. The main content area is split into two columns: 'Add sequence' on the left and 'Transfer sequence' on the right. The 'Add sequence' column contains a list of items with a scroll bar and a right-pointing arrow button. The 'Transfer sequence' column contains a list of items with a scroll bar and a right-pointing arrow button. To the right of the 'Transfer sequence' list are five buttons: 'Edit', 'Clear', 'Clear All', 'Move Up', and 'Move Down'. At the bottom of the window, there is an 'Example:' field containing the text: `S15{Tab}0.5{Tab}37.5{Tab}Oil Filter{Tab}Job Difficulty{Tab}Tax{Tab}N/A{Tab}097`.

- 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 required tab.
 - 4 Select each item in the Add sequence frame and click the **Add** icon .
 - 5 Click the **Footer** tab and program the footer sequence that will complete the transfer.
- To reposition items or delimiters in the sequence, select an item and click **Move Up** or **Move Down**.

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.

You may be automatically prompted to enter information into the Advanced window, or if you are using Microcat LIVE you can also click the Advanced button.

To add advanced fields to the sequence:

- 1 In Microcat LIVE, 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**.

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 Infomedica products to your DMS.

Transfer parts or service information to your DMS

To transfer parts from Microcat LIVE to the DMS:

- 1 In Microcat LIVE, add parts to the Order List.
- 2 Click the **Transfer** drop-down menu and select **DMS**.
- 3 In the Transfer List window, select each part and click **Transfer**.

To transfer service information from Superservice Menus to the DMS:

- 1 In Menus, add a service operation or repair to the Quoting and RO System.
- 2 Click the **Transfer** drop-down menu and select **DMS**.
- 3 In the Transfer List window, select each item and click **Transfer**.

To transfer service information from Superservice Triage to the DMS:

- 1 In Triage, mark the status of the VHC as **Completed** and then click **Save**.
- 2 Click **Transfer to DMS**.
- 3 Select the operations and click **Transfer Work**.
- 4 In the Transfer List window, select each item and click **Transfer**.

To transfer parts from Auto PartsBridge to the DMS:

- 1 In Auto PartsBridge, finalise your order in the Order screen.
- 2 Obtain the invoice number from your DMS for each line item in Auto PartsBridge.
- 3 Click **Send to DMS** in the Order screen.
- 4 In the Transfer List window, select each part and click **Transfer**.
- 5 Type the invoice number from your DMS into the **Invoice Number** field.
- 6 Click **Order Details** to view the full list of parts and to enter the invoice numbers for parts that are on different DMS invoices.
- 7 Click **Apply**.

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:

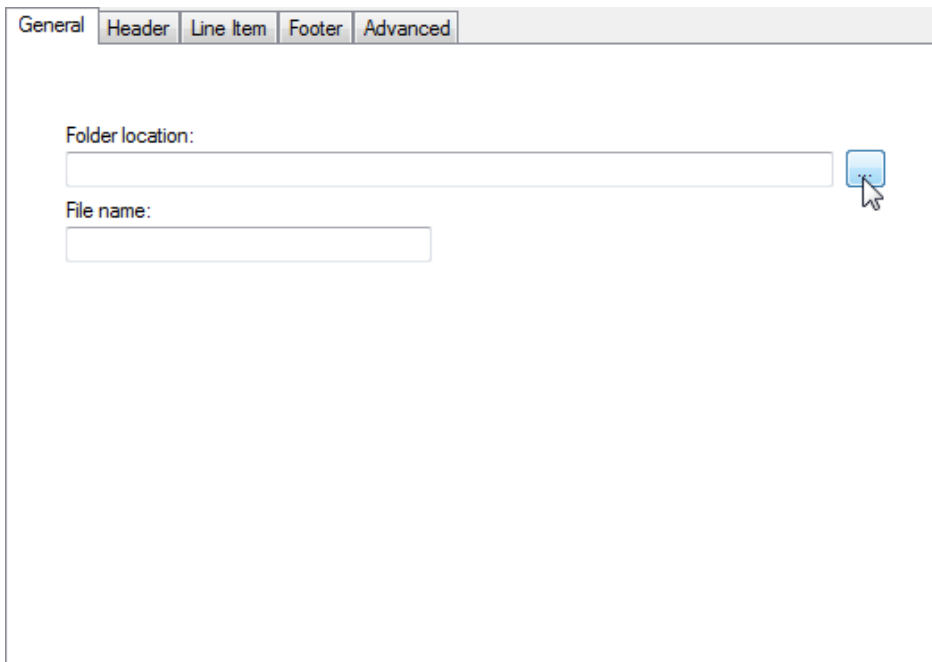
- **Delimited:** Each field in the transfer sequence is separated by a specified character, such as a tab or a comma.
- **Fixed-width:** The width of each field in the transfer sequence is set to a specified number of characters.

Create a batch file connection

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

To create a batch file connection in Microcat LIVE:


- 1 Right click the **DMSi** icon  on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select your Microcat LIVE product 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.

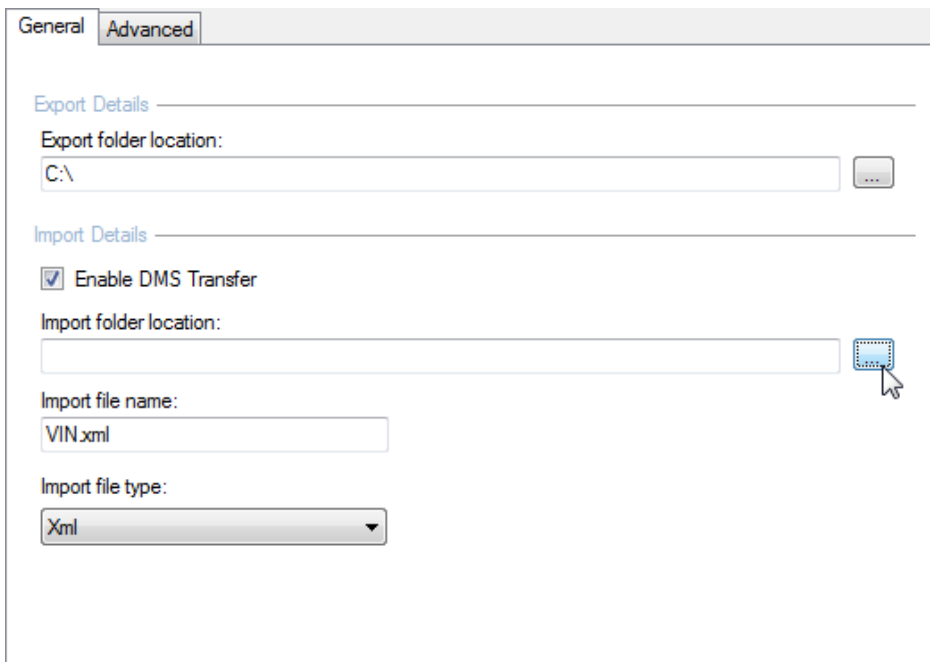


The screenshot shows a configuration window with tabs for 'General', 'Header', 'Line Item', 'Footer', and 'Advanced'. The 'General' tab is selected. It contains two text input fields: 'Folder location:' and 'File name:'. The 'Folder location:' field has a blue 'Browse' button to its right, which is being clicked by a mouse cursor.

- 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.

To create a batch file connection in Superservice Menus:

- 1 Right click the **DMSi** icon  on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select Superservice Menus from the **Application** drop-down menu.
- 4 Select 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 **Browse** 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**.
- 7 If you want to import files from your DMS, select the **Enable DMS transfer** checkbox.
- 8 Click **Browse** 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 configuration window. It is divided into two sections: 'Export Details' and 'Import Details'.
 In the 'Export Details' section, there is a label 'Export folder location:' followed by a text input field containing 'C:\' and a small '...' button to its right.
 In the 'Import Details' section, there is a checked checkbox labeled 'Enable DMS Transfer'. Below it is the label 'Import folder location:' followed by an empty text input field and a '...' button. A mouse cursor is pointing at this button.
 Below that is the label 'Import file name:' followed by a text input field containing 'VIN.xml'.
 At the bottom is the label 'Import file type:' followed by a drop-down menu with 'Xml' selected.

- 9 Type or edit the file name in the **Import file name** field.
- 10 Select the file type from the **Import file type** drop-down menu.

Program the transfer sequence (Microcat LIVE)

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 the 'Header' tab selected in the software interface. The 'Add sequence' section contains buttons for VIN, Reg. No., Customer name, Account number, Text, Return, Line feed, Tab, Comma, Date/Time, and Advanced. The 'Transfer sequence' section has a large empty text area and buttons for Edit, Clear, Move Up, Move Down, and Clear All. An 'Example:' label is at the bottom left.

- 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.

- 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**.

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.

You may be automatically prompted to enter information into the Advanced window, or if you are using Microcat LIVE you can also click the Advanced button.

To add advanced fields to the sequence:

- 1 In Microcat LIVE, 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**.

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.

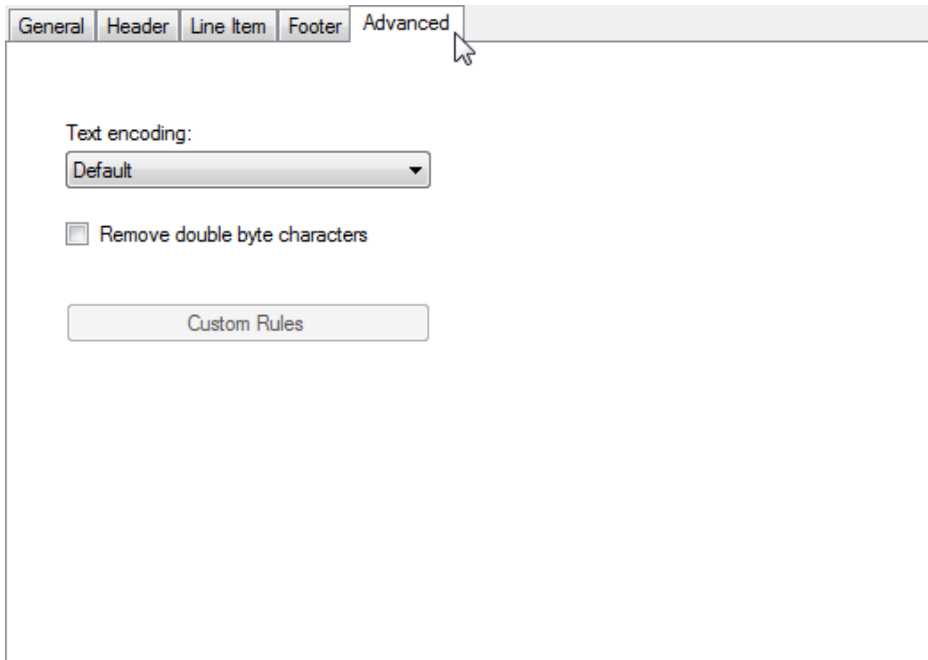
To remove all items from the list, click **Clear All**.

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.



The screenshot shows a configuration window with five tabs: General, Header, Line Item, Footer, and Advanced. The Advanced tab is selected and active. Inside the Advanced tab, there are three main settings: a 'Text encoding:' dropdown menu currently set to 'Default', a checkbox labeled 'Remove double byte characters' which is currently unchecked, and a 'Custom Rules' button.

- 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 the **Transfer** drop-down menu and select **DMS**.

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 In Menus, add a service operation or repair to the Quoting and RO System.
- 3 Click the **Transfer** drop-down menu and select **DMS**.

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

Work with MMP connections

Microcat Messaging Protocol (MMP) is a two-way messaging system that enables Infomedia products, to both transmit information to, and receive data from, the DMS.

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

Create an MMP connection

An MMP connection contains the settings necessary for the Infomedia product to integrate with the DMS.

To create an MMP connection:

- 1 Right click the **DMSi** icon  on the Windows taskbar and select **Settings**.
- 2 Click **Add New**.
- 3 Select your Infomedia product 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.

Configure the DMS application

The configuration requirements for the Infomedia product 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 window with two tabs: 'General' and 'Advanced'. The 'Advanced' tab is selected. The window is divided into two sections: 'Connection Details' and 'Specification details'. In the 'Connection Details' section, there is a 'Server:' label followed by a text input field containing 'localhost' and a small '...' button to its right. Below that is a 'Port:' label followed by a text input field containing '1998'. To the right of the port field is a 'Test Connection' button. In the 'Specification details' section, there is a 'Version:' label followed by a dropdown menu showing 'MMP Specification 1.00.0000 (MMP_01_00_0000)'. Below the dropdown 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.

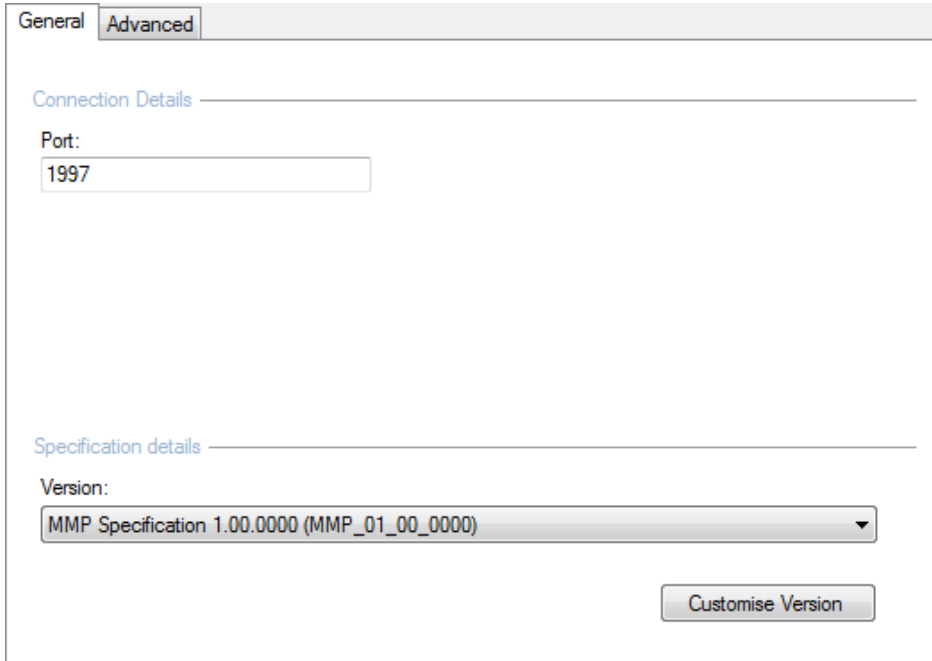
If necessary, properties of the protocol can be customised to make it compatible with the host operating system of the DMS. Click **Customise Version**, and amend the fields as required.

Listen for connections

To configure the connection details:

- 1 Type the port number that the Infomedia product 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 screenshot shows a configuration window with two tabs: 'General' and 'Advanced'. The 'Advanced' tab is selected. Under the 'Connection Details' section, there is a 'Port:' label followed by a text input field containing the number '1997'. Below this, under the 'Specification details' section, there is a 'Version:' label followed by a dropdown menu. The dropdown menu is open, showing the selected option: 'MMP Specification 1.00.0000 (MMP_01_00_0000)'. To the right of the dropdown menu is a button labeled '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 the Infomedia product.

The screenshot shows a configuration window with two tabs: 'General' and 'Advanced'. The 'Advanced' tab is active. Under the 'Connection Details' section, there are four input fields arranged in a 2x2 grid. The top-left field is 'Import folder location:' with a text input box and a blue '...' browse button. A mouse cursor is clicking this button. The top-right field is 'Export folder location:' with a text input box and a grey '...' browse button. The bottom-left field is 'Import file name:' with a text input box. The bottom-right field is 'Export file name:' with a text input box. Below this section is the 'Specification details' section, which contains a 'Version:' label and a dropdown menu. The dropdown menu is open, showing the selected option: 'MMP Specification 1.00.0000 (MMP_01_00_0000)'. At the bottom right of the 'Specification details' section is a 'Customise Version' button.

- 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 the Infomedia product will write the MMP files intended for the DMS.
- 4 Type the name of the file that will be created by the Infomedia product 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 the Infomedia product integrates with the DMS.

To apply advanced settings:

- 1 Click the **Advanced** tab.

The screenshot shows a configuration window with two tabs: 'General' and 'Advanced'. The 'Advanced' tab is active. The window is divided into two sections: 'Character conversion' and 'Integration options'. In the 'Character conversion' section, there is a 'Text encoding:' label followed by a dropdown menu currently showing 'Default'. In the 'Integration options' section, there are three settings: 'Limit inquiry results to:' with a numeric input field containing '100' and a 'records' label; 'Inquiry times out after:' with a slider input field and a '30 seconds' label; and a checkbox labeled 'Use file polling' which is currently unchecked.

- 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.
 - **Limit inquiry results to:** The number of records the DMS returns will be limited to the specified number.
 - **Inquiry times out after:** The Infomedia product 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 the Infomedia product 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

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 the **Transfer** drop-down menu and select **DMS**.
- 3 If prompted, click **Finalise to DMS** to confirm the transfer.

The parts will be transferred to the DMS.

Superservice Menus

Log on to the DMS

To log on to the DMS from Superservice Menus:


- 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 Access the Quoting and RO System screen.
- 2 Click the **Customer Inquiry** icon  next to the **Customer Name** field.
- 3 Type the customer name or account number into **Customer/Company** field.
- 4 Click **Search**.

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

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

Job transfer

To transfer service information to the DMS:

- 1 Add operations to the Quoting and RO System.
- 2 Click the **Transfer** drop-down menu and select **DMS**.

The parts will be transferred to the DMS.

Use listen for connections

Listen for connections can be used to:

- Retrieve customer details from the DMS
- Perform a part inquiry
- Transfer parts to the DMS

Microcat LIVE

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.

Superservice Menus

Customer Inquiry

To retrieve customer details from the DMS:

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


Job transfer

To transfer service information to the DMS:

- 1 Add operations to the Quoting and RO System.
- 2 Click the **Transfer** drop-down menu and select **DMS**.
The parts will be transferred to the DMS.

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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