DMS Datastore
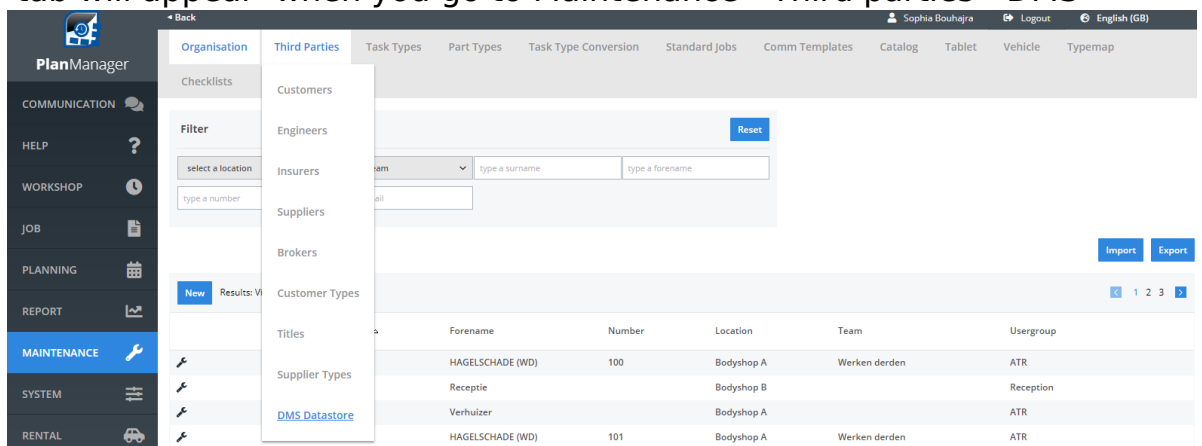# DMS Datastore

DMS DataStore

The DMS DataStore offers the possibility to store lists of vehicles and linked customers coming from one or more external databases (DMS systems or fleet databases) within your own PlanManager environment without having to create new files/jobs. Quite useful if you work as a body shop for one or more fleets because in this way can quickly find vehicle and driver information based on a registration/license plate or VIN. And also interesting if you want a simple link between a garage package (DMS system) and PlanManager for customer and vehicle information. The data must be exported by the external system in a predetermined and simply structured text file (CSV), so that you can import this information in PlanManager into the DMS DataStore. Once the information has been uploaded you can immediately request the vehicle information (and possibly the linked customer) in a file/job based on registration/license plate or chassis number. For more information regarding the required format of this CSV file, please contact our helpdesk.

How can you activate the DMS DataStore function in PlanManager?

If you want to activate this functionality, please contact our helpdesk. Some settings have to be enabled for this. As soon as you have received confirmation from the helpdesk that the functionality is active, you can make the page of the DMS DataStore visible by activating the rights in the user group. To do this, go to System- User groups - Maintenance- Third parties - DMS DataStore (tick the permissions here). Once the permissions are checked, an additional 'DMS DataStore' tab will appear when you go to Maintenance - Third parties - DMS

DataStore.

How do I import data into the DMS data store?

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On the DMS page you will have the opportunity to import data. Press the "Import

CSV" button to upload new data.

Here you have the option to import the list "incremental". Hereby we will look at which data is not yet known in the DMS DataStore. These will be added. If you choose the option "Fully", all data from the CSV file will be added to the DMS DataStore.

You also need to indicate in the menu if the CSV file contains customer data or vehicle data. In "Source" it is possible to indicate from which DMS the import is made (for example the name of the garage or fleet you work for).

! Important: This is not an automatic process. You will only see DMS options here if they were previously communicated to our helpdesk. If these were not communicated beforehand, you will only see "Default".

You can also see on this page when an import was made and by which user. If you press the button "customer example" or "vehicle example", a sample CSV file will be created. This is sample file in the required format (fields and their sequence). If you would like more information about the format / which data you can import, you can always contact our helpdesk via support@insypro.com

How do I search for a car in the DMS DataStore?

After the lists have been uploaded via the import button on the DMS page, you can search the file by number plate or chassis number. When opening the file, a car icon

will now be visible next to the number plate field and the chassis number.

To start a search, enter a license plate or chassis number in their respective fields and press the icon. If the car is known, the data will be uploaded automatically in the file/job. If a customer is linked to the vehicle (because a customer list was uploaded too), then this information will be available directly ion the file/job as well.
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