



## e-automate 8.5 Installation Guide



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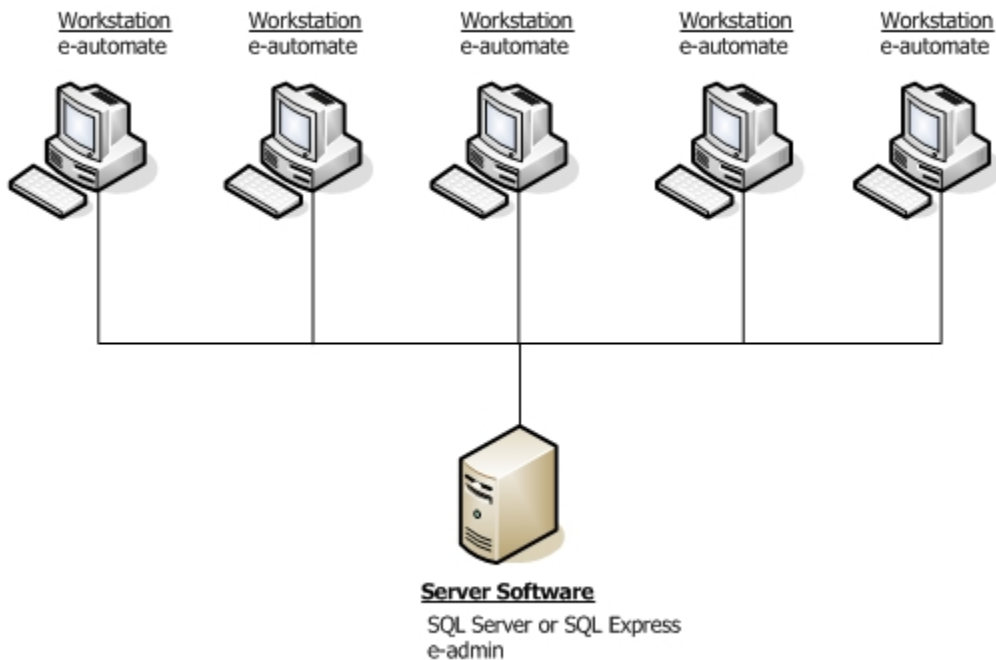
## New Installation Introduction

Congratulations in selecting e-automate as your business management solutions software. You have chosen a company devoted to helping you and your business succeed.

The purpose of this document is to assist you in getting your e-automate system installed. Getting Started walks you through the installation of SQL Express, e-admin, and e-automate, the main components to your e-automate system. You will also install a license key and create and restore a sample database. You use the sample database to get acquainted with the software by looking at sample customers, vendors, inventory items, equipment, et cetera. You can also use the sample database to begin testing e-automate transactions in a safe environment.

Before beginning this process, ensure that the minimum system requirements for hardware and software have been met. To view the system requirements see *e-automate System Requirements 8.5* on the website. Successful implementation of your system depends upon meeting the minimum system requirements.

e-automate is a client-server application. This means that your company data is stored on a server and accessed via a computer network using client computers. The data is stored in a Microsoft<sup>®</sup> SQL database on the server. The server is connected via a network to other computers called workstations or clients. Your users work on these workstations to accomplish their day-to-day tasks.





In order for this configuration to work, certain software programs must be installed on the server and other programs on the workstations. The main software programs that are installed on the server are Microsoft<sup>®</sup> SQL Server and e-admin often called e-automate Server. Not all companies who purchase e-automate purchase and install the full version of Microsoft<sup>®</sup> SQL Server. Smaller dealers with five or fewer employees often go with Microsoft<sup>®</sup> SQL Express. SQL Express is a version of SQL that comfortably supports up to five users. SQL Express offers the SQL Server Management Studio which offers valuable tools for running scripts and troubleshooting problems. Only Microsoft<sup>®</sup> SQL Server and Microsoft<sup>®</sup> SQL Express 2005 and above are supported in the 8.5 version of e-automate.

Installing SQL Server and e-automate on a domain controller is not supported or recommended. There are specific security restrictions when running SQL Server in this configuration and given the resource demands of a domain controller, SQL Server performance may be degraded. Furthermore, SQL Server is not supported on a read-only domain controller. Setup will normally fail. Even if you find methods to work around the problem with setup, SQL Server is not supported on a read-only domain controller. In addition, SQL Server failover clustering is not supported to install on a domain controller.

e-admin is the server program that manages your company's database, security, licensing, connections and database maintenance. Once the server is installed and configured, you install the e-automate client software on your workstations.

If you want to use custom reports for your business operations, please be sure that you are running the latest version of Crystal (Crystal 2008 which is version 12) before installing e-automate 8.5. Once you have installed 8.5, if you have any issues generating custom reports contact your account manager.

Based on your selection of products, follow the instructions appropriate for your configuration to get your e-automate system up and running.

## Installing Full Microsoft SQL Server

If you intend to use the full version of Microsoft<sup>®</sup> SQL Server you should have it installed by a qualified computer professional. Only Microsoft<sup>®</sup> SQL Server 2005 and above is supported in the 8.5 version of e-automate. Once SQL Server is installed you should follow the instructions labeled, *Downloading e-admin and e-automate*.

Installing SQL Server and e-automate on a domain controller is not supported or recommended. There are specific security restrictions when running SQL Server in this configuration and given the resource demands of a domain controller, SQL Server performance may be degraded. Furthermore, SQL Server is not supported on a read-only domain controller. Setup will normally fail. Even if you find methods to work around the problem with setup, SQL Server is not supported on a read-only domain controller. In addition, SQL Server failover clustering is not supported to install on a domain controller.



## Installing Microsoft SQL Express

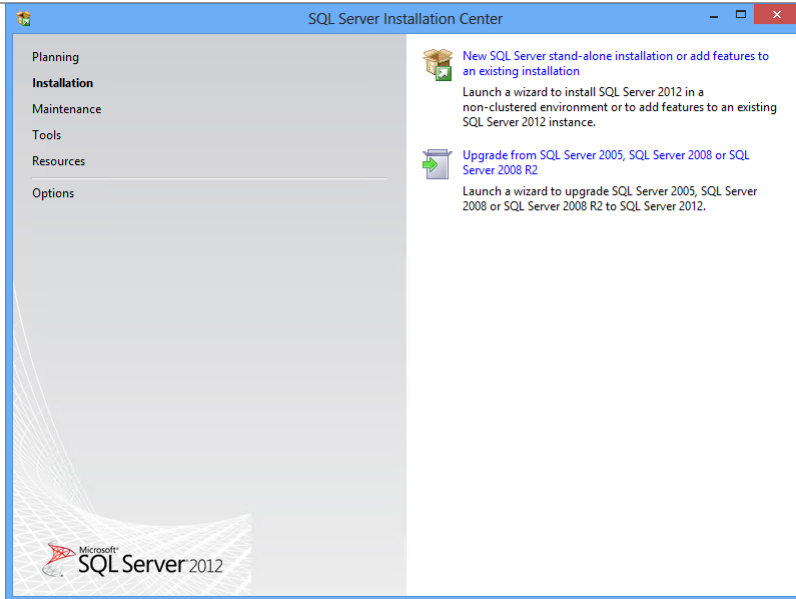
Follow these instructions if you intend to use the SQL Express and the associated SQL Server Management Studio Express SQL Express. Before you can install SQL Express you must download the installation files from the Microsoft website. Only Microsoft® SQL Express 2005 and above are supported in the 8.5 version of e-automate.

Installing SQL Server and e-automate on a domain controller is not supported or recommended. There are specific security restrictions when running SQL Server in this configuration and given the resource demands of a domain controller, SQL Server performance may be degraded. Furthermore, SQL Server is not supported on a read-only domain controller. Setup will normally fail. Even if you find methods to work around the problem with setup, SQL Server is not supported on a read-only domain controller. In addition, SQL Server failover clustering is not supported to install on a domain controller.

The following instructions outline the installation of the standard 32-bit version of SQL Express, but the 64-bit version is also available for download, if appropriate. If you need assistance, contact a qualified computer professional for assistance.

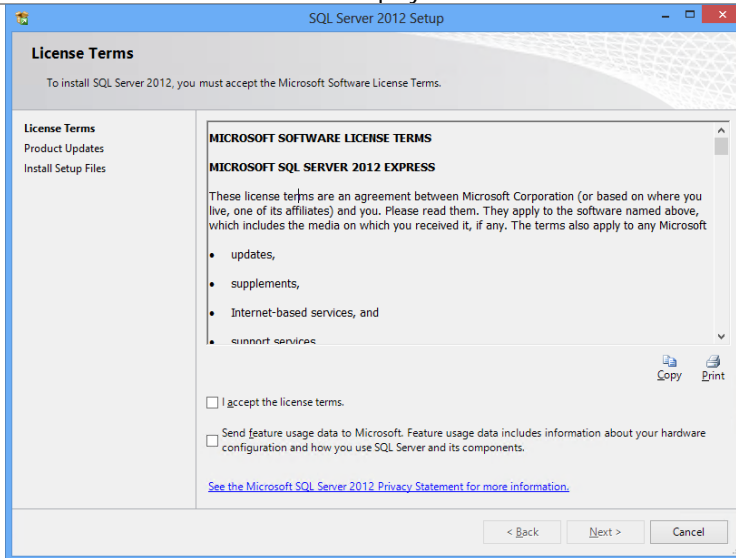
1	<ul style="list-style-type: none"> <li>Go to <a href="http://www.microsoft.com">http://www.microsoft.com</a> and click on <b>Downloads&gt;Download Center</b>.</li> </ul>
2	<ul style="list-style-type: none"> <li>Perform a search for "<i>Microsoft SQL Server 2012 Express</i>."</li> <li>Select the SQL Server 2012 Express download with the most recent release date. The Service Packs only contain the latest fixes.</li> </ul>
3	<ul style="list-style-type: none"> <li>Select your language and click <b>Download</b> to go to the Choose the Download you Want window.</li> </ul>
4	<ul style="list-style-type: none"> <li>From the Choose the Download you Want window, select either the <b>ENU\x64\SQLEXPRT_x64_ENU.exe</b> for the 64-bit install or <b>ENU\x86\SQLEXPRT_x86_ENU.exe</b> for the 32-bit install.</li> <li><b>Note:</b> Be sure to download the appropriate version for your business needs.</li> <li>Click <b>Next</b> to begin downloading the SQL Server 2012 Express installer.</li> </ul>
5	<ul style="list-style-type: none"> <li>Click <b>Run</b> when asked 'Do you want to run or save SQLEXPRT from download.microsoft.com' to begin downloading the SQL Server 2012 Express installer. When the download is complete, the SQL Server Installation Center window displays.</li> </ul>

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- Click **New SQL Server stand-alone installation or add features to an existing installation**. The License Terms window displays.

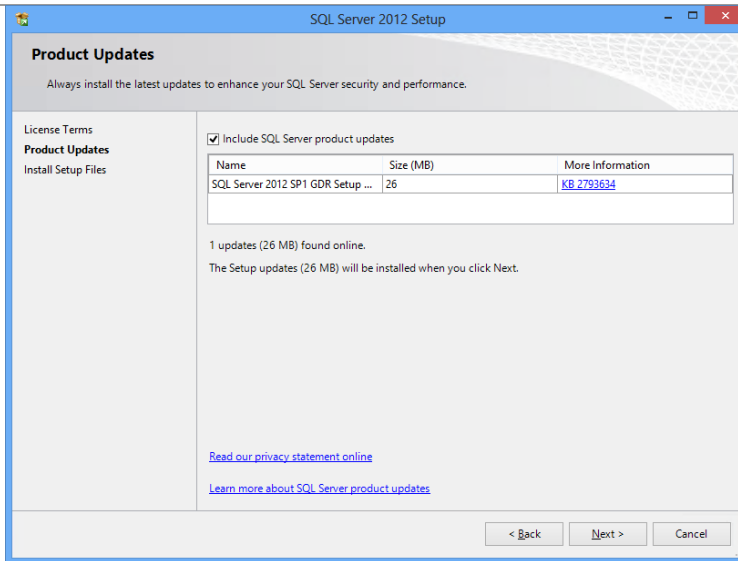
7



- Review the license terms and click the **I accept the license terms** checkbox. Optionally, you can click the **Send feature usage data to Microsoft** checkbox, if desired.
- Click [**Next >**]. If there is an available update, the Product Updates window displays.

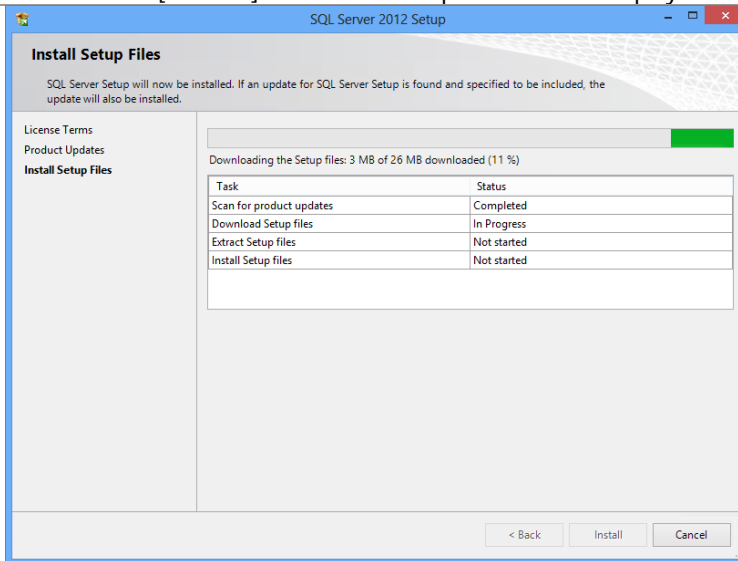


8



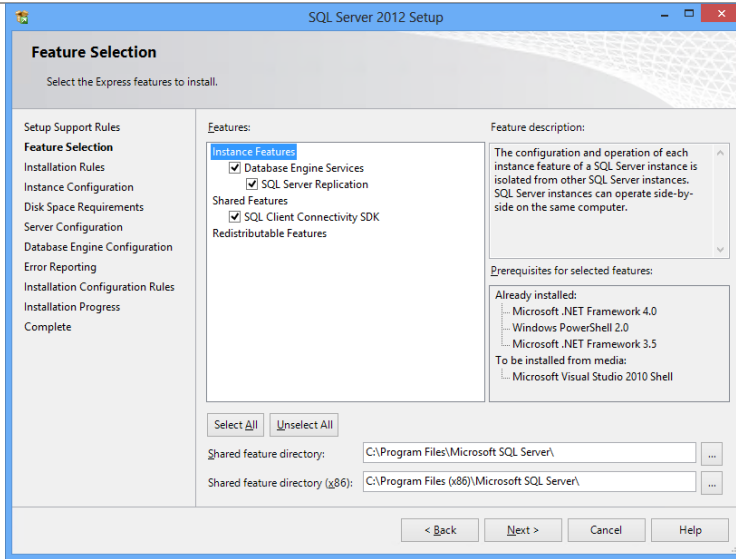
- Click [**Next >**]. The Install Setup Files window displays.

9



- The Setup Files download. This may take a few minutes. The Feature Selection window displays.

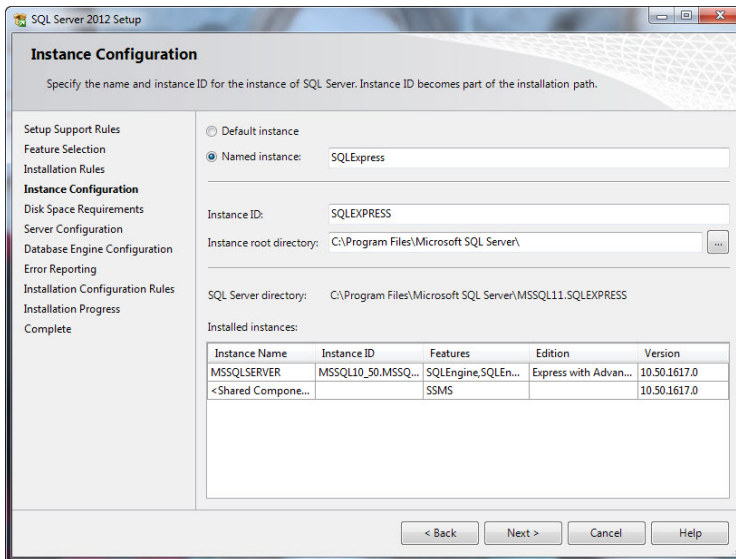
10



- Confirm each feature is selected and click **[Next >]**. The Instance Configuration window displays.  
**Note:** Throughout the installation, unless explicitly directed to do so, do not change the default settings specified by the installer. If you want a customized installation, contact a qualified computer profession to install your SQL software.

11

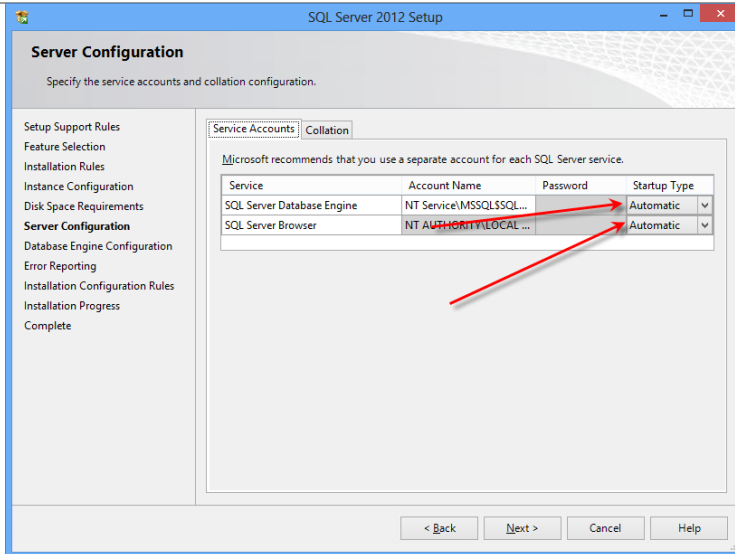
A named instance of SQL Server called SQLEXPRESS will install by default. The SQL Server will now be identified as <hostname>\<instance name>, for example EA-SERVER\SQLEXPRESS. If you are not running any other instances of SQL, you can optionally change this to be the **Default instance**, and your SQL Server will be identified as <hostname>.



- Select your instance and click **[Next >]**. The Server Configuration window displays.



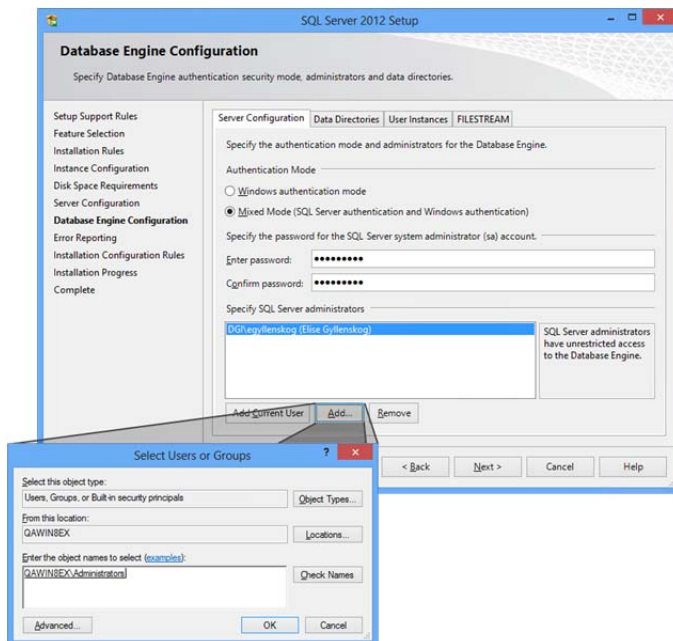
12



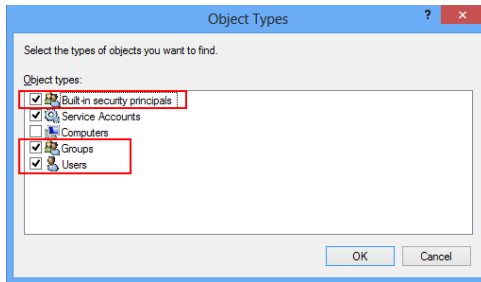
- On the **Service Accounts** tab, confirm that the SQL Server Database Engine Startup Type and the SQL Server Browser Startup Type are both set to Automatic.
- On the **Collation** tab, confirm that the **Database Engine** field displays *SQL\_Latin1\_General\_CP1\_CI\_AS* and the **Analysis Services** field displays *Latin1\_General\_CI\_AS*.  
**Note:** If you want a customized installation, contact a qualified computer profession to install your SQL software.
- Click [**Next >**]. The Database Engine Configuration window displays.

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To guarantee access to e-admin, you will need to add the local administrators group. This ensures that any Windows user that is included in the local administrators group, whether they are a domain or local user, will have access to SQL.

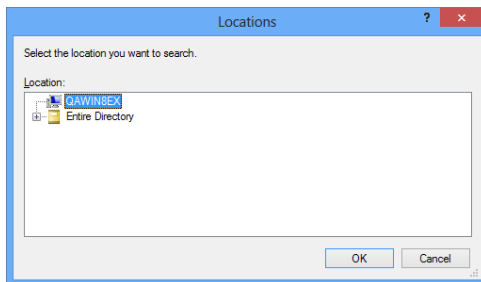


- Select **Mixed Mode (Windows Authentication and SQL Server Authentication)**.
- Enter a password of your choosing in the **Enter password** field.
- Enter the password again in the **Confirm password** field.
- Click **[Add]** under the **Specify SQL Server administrators** field.
- From the **Select Users or Groups** window, click **[Object Types]** to open the **Object Types** window. Confirm that **Built-in security principals**, **Groups**, and **Users** are checked.



Click **[OK]** to close the **Object Types** window.

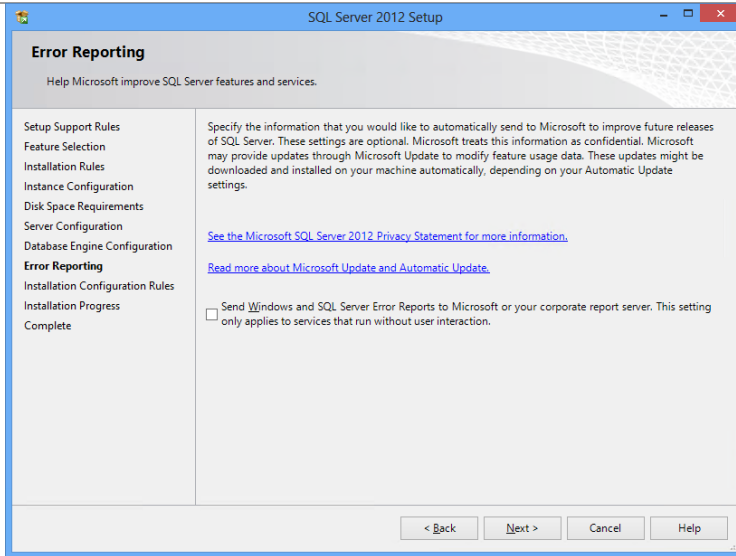
- From the **Select Users or Groups** window, click **[Locations]** to open the **Locations** window. Select the local machine name.



Click **[OK]** to close the **Locations** window.

- 14
- Type *Administrators* in the **Enter the object names to select** field and click **[Check Names]**. The ServerName\Administrators group will automatically populate.
  - Click **[OK]** to return to the Database Engine Configuration window.
  - Click **[Next >]**. The Error Reporting window displays.
- Note:** Do not change the default settings on the Data Directories tab. If you want a customized installation, contact a qualified computer profession to install your SQL software.

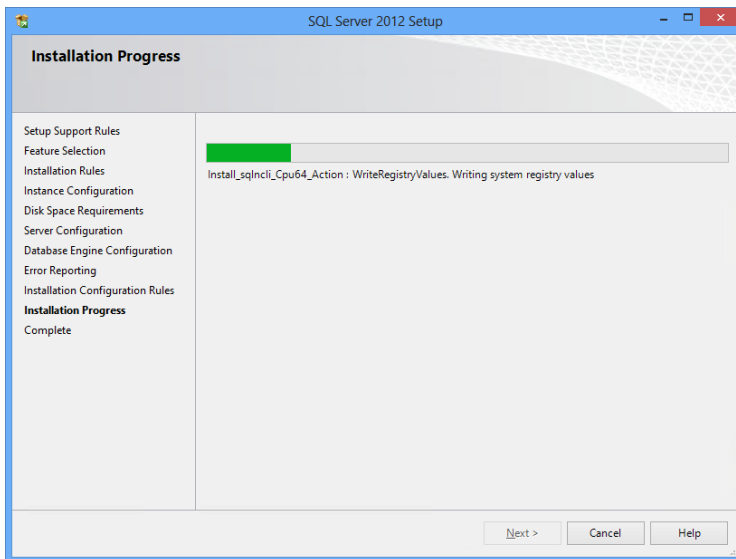
15



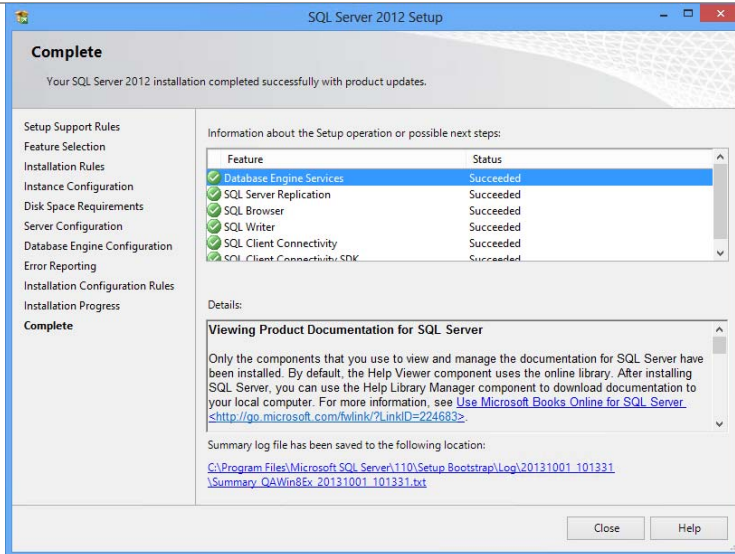
- Click the **Send Windows and SQL Server Error Reports to Microsoft** checkbox if desired. This setting is optional.
- Click [**Next >**]. The Installation Progress window displays.

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This window shows the progress of the installation. When the entire installation has taken place, the Complete window displays.



17



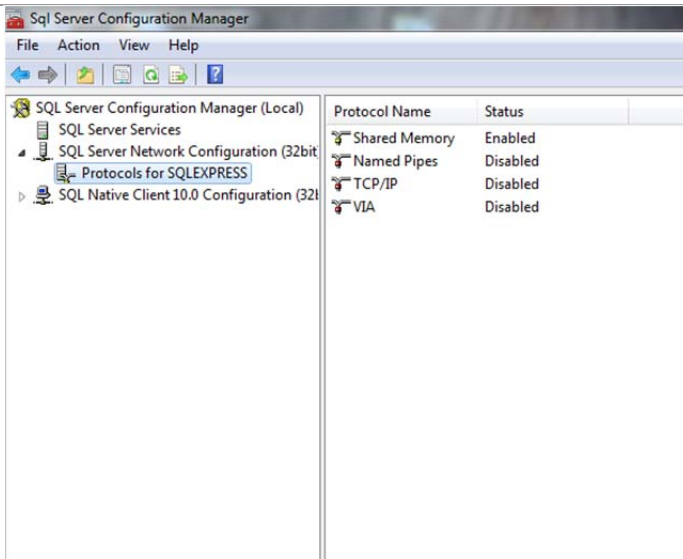
- Click [**Close**] to exit out of the installation.

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Once installation is complete, you will need to run the SQL Server Configuration Manager to change some specific protocols for SQLExpress. If you are using Windows 7, you may use the following instructions.

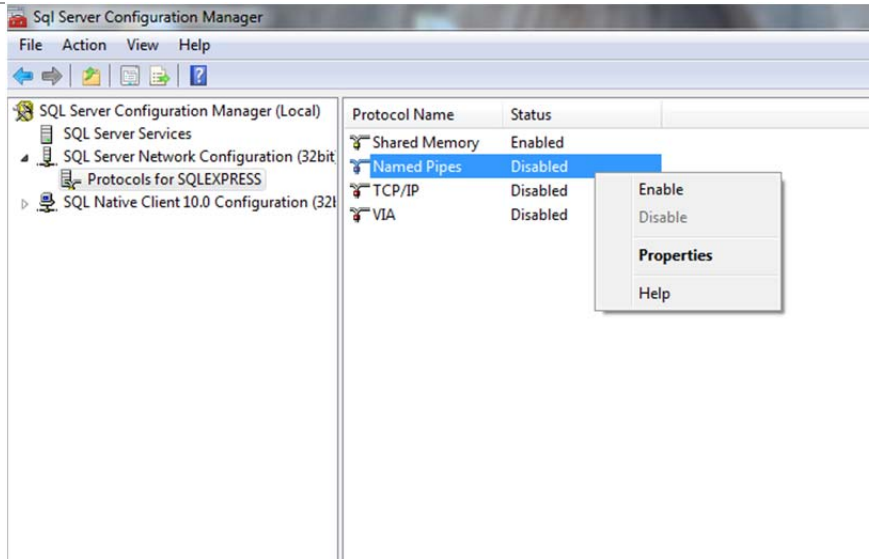
From your Programs, locate and open the SQL Server Configuration Manager. Access to your programs differs depending upon which version of Windows you are running.

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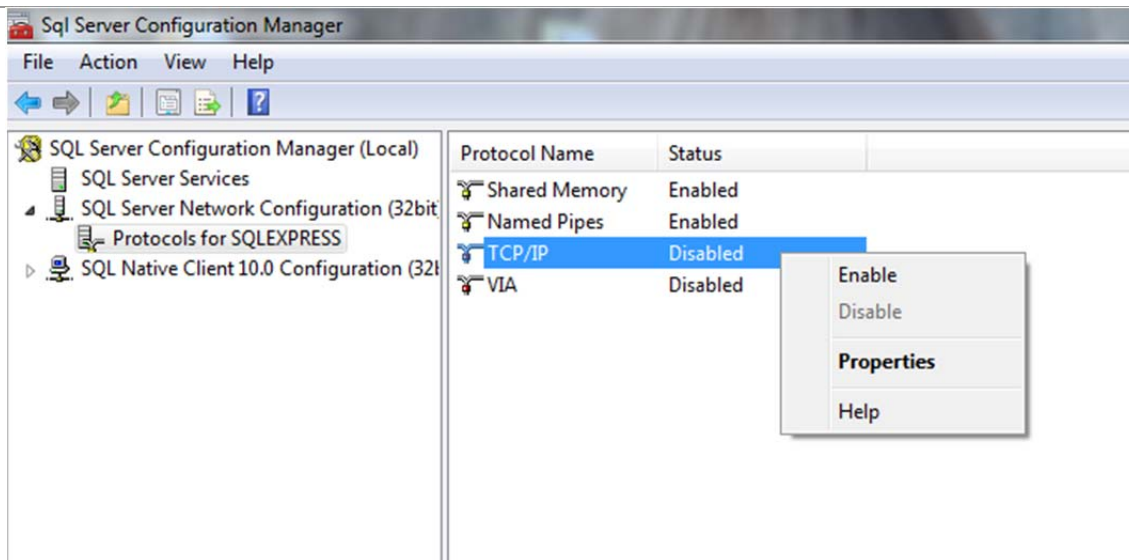
- Locate and expand the **SQL Server Network Configuration** by clicking on the arrow.
- Click on **Protocols for SQLEXPRESS**. The SQL Server Configuration window displays the protocols in the right window.

20



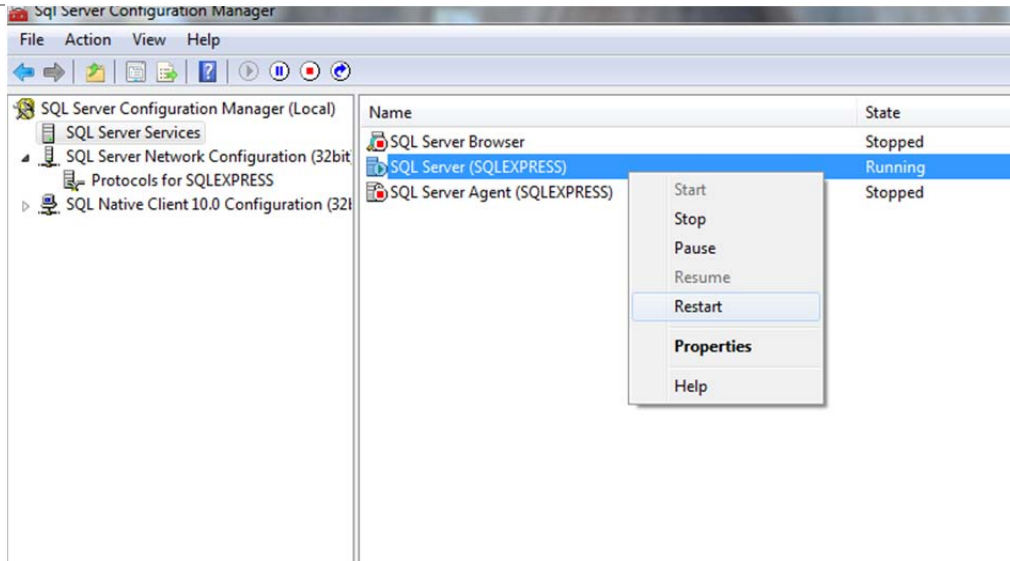
- Right-click on **Named Pipes** and select **Enable**.
- Click [OK] to acknowledge the restart server warning.

21



- Right-click on **TCP/IP** and select **Enable**.
- Click [OK] to acknowledge the restart server warning.

22



- Select **SQL Server Services** in the left-hand window.
- Locate your instance in the right-hand window, right-click and select **Restart**.

## Downloading e-admin and e-automate

Before you can begin the installation of e-admin, e-automate and e-agent, you must first download the software. You can access the software by going to <http://www.e-automate.com> and logging in with the appropriate credentials. If you need assistance with this process, please contact Customer Care who can route you to your account manager or provide you with the instructions to obtain the software.

## Downloading a Sample Database

When initializing e-admin, you will be offered the option to create and restore a sample database which provides you with the ability to get acquainted with the software by looking at sample customers, vendors, inventory items, equipment, et cetera. You can choose to download a sample database which allows you to test e-automate transactions in a safe environment using the training exercises provided, or you can download just the sample database with no exercises supplied. You will need to download this database prior to installing and initializing e-admin. Follow these steps to obtain a sample database.

- 1
  - Navigate to <http://www.e-automate.com> and log in with the appropriate credentials. The Customer Resource Center page displays.  
**Note:** If you need assistance to obtain your login credentials, please contact your account manager.

2

**DIGITAL gateway** Member Home Logout Account

Welcome Back Digitalgateway!

### Customer Resource Center

The source of information for Digital Gateway Customers.

Backing up your database.

- e-automate 8.0** is now available. Please click on this link to be taken to the 8.0 download area.
- Add-on Product Sales Webinar Series** Catch up or get a refresher on the Add-on products that help e-automate be the best end-to-end solution for dealers.
- A new update for e-automate 7.5.0** is now available to the general public. Please click on this link to be taken to the e-automate 7.5.0 updates page.
- Remote Access Link** If requested by a Digital Gateway Customer Care Technician, please click on the following link: GoToAssist

Please click here to download Jack Duncan's presentation from the Fall 2007 EUG Meeting in Salt Lake City  
Click Here

See what you missed at our last EUG meeting in Las Vegas  
Play Video | Download Video

See what is in store for the EUG meeting in Salt Lake City  
Play Video | Download Video

*Special Thanks to Al Ford of Image One Corporation for creating these brilliant movies!*

**Knowledge Base**  
New Knowledge Base

**Learning Videos**  
Learning Videos  
Hosted  
H.E.L.P.

**Downloads**  
Documentation  
Archive  
Software Downloads  
Customer Files  
Training Downloads

**Other Resources**  
e-automate Users Group  
join e-automate Users Group  
RapidAssist  
Database Backups

**Get update alerts**

**Update Contacts**

- Click on **Training Downloads** in the menu bar. The Training Downloads page displays.



## Training Downloads

Here you can find materials that have been mentioned in training courses offered by Digital Gateway.

Click on the link to open or save the content.

### 8.0 Sample Database

Use this download if you want sample data, but do not intend to practice with our training exercises.  
8.0 Sample Database (WinZip)

### Online Course Downloads

Designing Queries in DTF (2 MG)  
Designing Events in DTF (1.8 MG)

### Classroom Course Downloads

Classroom Training Directions (to/from the airport, hotels, training facility)  
Atlanta, GA (WinZip)  
Provo, UT (WinZip)

Training Flow Charts  
Essentials Flow charts 01 (WinZip)  
Essentials Flow charts 02 (WinZip)

### Training Databases with Corresponding Exercises

These training databases and exercises are used during the New User Essentials classroom trainings. We divide the classroom course into sections based on modules, Inventory (includes Purchasing), Sales, Contracts, Dispatch, and Accounting.

#### \*Instructions for the use of these databases and exercises\*

1. Find the section with the correct version below.
2. Download the following based on the scenarios specified below.
  - Inventory Database - Complete all of the exercises in order OR only the Inventory and Purchasing exercises.
  - Sales Database - Begin with the Sales exercises, skipping the Inventory exercises.
  - Contracts Database - Begin with the Contract exercises, skipping the Inventory and Sales exercises.
  - Dispatch Database - Begin with the Dispatch exercises, skipping the Inventory, Sales & Contract exercises.
  - Accounting Database - Begin with the Accounting exercises, skipping the Inventory, Sales, Contracts, & Dispatch exercises.
  - Training Sample Databases Compiled - Want all five of the databases to accommodate all of your individual users' needs.
3. Use this [PDF](#) to restore each training database to a test company in e-admin and start practicing in e-automate.

#### 7.6.0 Training Sample Databases

- 7.6.0 Inventory Database - no exercises completed (WinZip)
- 7.6.0 Sales Database - Inventory and Purchasing exercises completed (WinZip)
- 7.6.0 Contracts Database - Inventory, Purchasing and Sales exercises completed (WinZip)
- 7.6.0 Dispatch Database - Inventory, Purchasing and Sales, and Contracts exercises completed (WinZip)
- 7.6.0 Accounting Database - Inventory, Purchasing, Sales, Contracts and Dispatch exercises completed (WinZip)
- 7.6.0 Training Sample Databases Compiled - All above zipped together for one download (WinZip)

#### 7.6.5 Training Exercises & Answer Screen Shots (can be used with 7.6 databases)

- 7.6.5 Training PDF Exercises 01 (WinZip)
- 7.6.5 Training PDF Exercises 02 (WinZip)
- 7.6.5 Training Word Exercises (WinZip)
- 7.6.5 Training Exercise Answer Screen Shots (WinZip)

#### 7.6.5 Training Sample Databases

- 7.6.5 Inventory Database - no exercises completed (WinZip)
- 7.6.5 Sales Database - Inventory and Purchasing exercises completed (WinZip)
- 7.6.5 Contracts Database - Inventory, Purchasing and Sales exercises completed (WinZip)
- 7.6.5 Dispatch Database - Inventory, Purchasing and Sales, and Contracts exercises completed (WinZip)
- 7.6.5 Accounting Database - Inventory, Purchasing, Sales, Contracts and Dispatch exercises completed (WinZip)
- 7.6.5 Training Sample Databases Compiled - All above zipped together for one download (WinZip)

#### 8.0 Training Exercises

- 8.0 Training PDF Exercises (WinZip)
- 8.0 Training Word Exercises (WinZip)

#### 8.0 Training Sample Databases

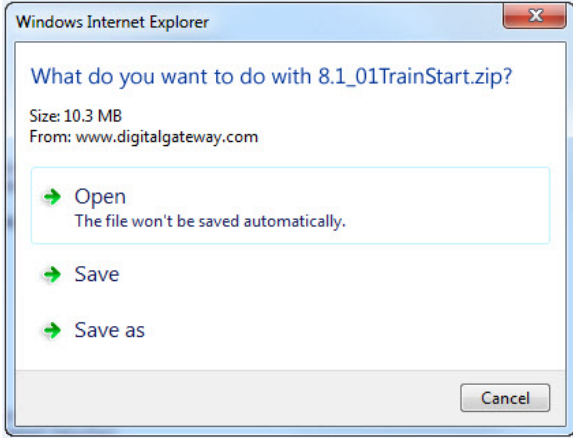
- 8.0 Inventory Database - no exercises completed (WinZip)
- 8.0 Sales Database - Inventory and Purchasing exercises completed (WinZip)
- 8.0 Contracts Database - Inventory, Purchasing and Sales exercises completed (WinZip)
- 8.0 Dispatch Database - Inventory, Purchasing, Sales, and Contracts exercises completed (WinZip)
- 8.0 Accounting Database - Inventory, Purchasing, Sales, Contracts and Dispatch exercises completed (WinZip)
- 8.0 Training Sample Databases Compiled - All above zipped together for one download (WinZip)

#### Other Training Content

- Handling Credit Cards (pdf)
- Manually Moving Balances Forward (pdf)
- Moving Balances Forward (pdf)
- Payroll Import (zip)

- Click on the appropriate sample database link for your needs under the **Training Downloads** section. The Windows Internet Explorer window displays.



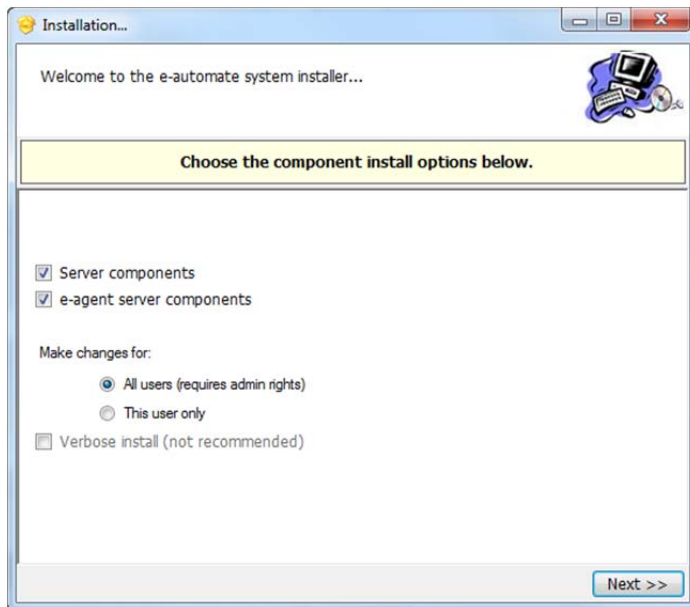
4	 <p>Windows Internet Explorer</p> <p>What do you want to do with 8.1_01TrainStart.zip?</p> <p>Size: 10.3 MB From: www.digitalgateway.com</p> <p>→ Open The file won't be saved automatically.</p> <p>→ Save</p> <p>→ Save as</p> <p>Cancel</p> <ul style="list-style-type: none"> <li>Click <b>Save as</b> and place this file in a location of your choice that will allow you to access it when creating a company database.</li> </ul> <p><b>Note:</b> This is downloaded as a .zip file so you will need to locate the file and unzip it to make it functional prior to creating your sample company database.</p>
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## Installing e-admin

Before installing e-admin, be sure you have completed the installation of Microsoft<sup>®</sup> SQL server or SQL Express version 2005 or newer. All versions of e-automate are downloaded from the website; e-automate software is not distributed on a CD/DVD.

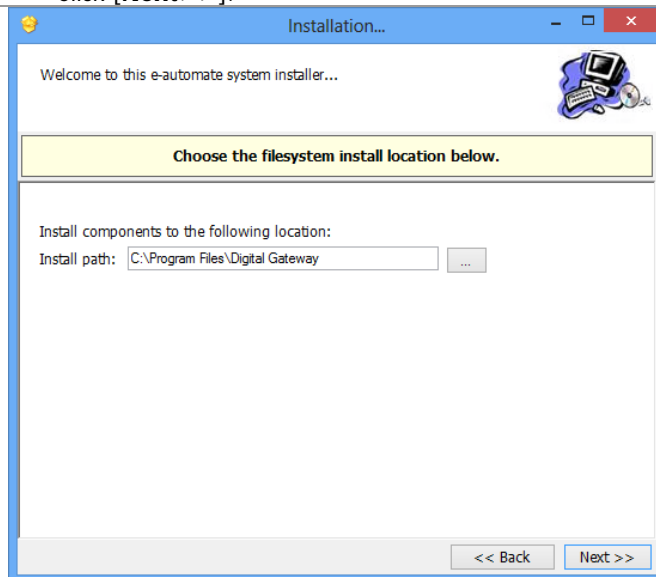
1	<ul style="list-style-type: none"> <li>Secure the download files from Customer Care. Customer Care can route you to your account manager or provide you with the instructions to obtain the software.</li> </ul>
2	<ul style="list-style-type: none"> <li>Right-click on the <b>e-automateServerSetup.exe</b> file and select <b>Run as administrator</b> to begin installation.</li> </ul>

3



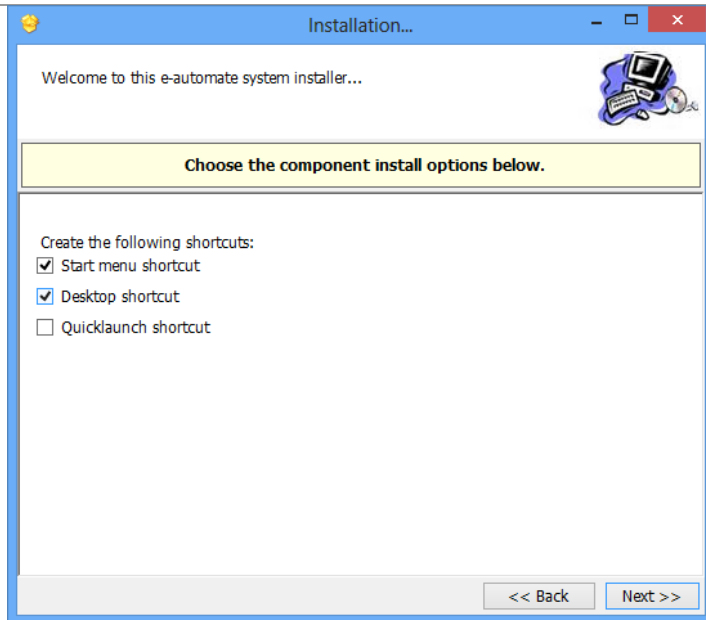
- Ensure that **Server components**, and **e-agent server components** are all checked.
- Ensure that **All users (requires admin rights)** is selected.  
**Note:** Because you are installing e-admin to your server (host) machine, it is not recommended to select **This user only**.
- Click [**Next>>**].

4



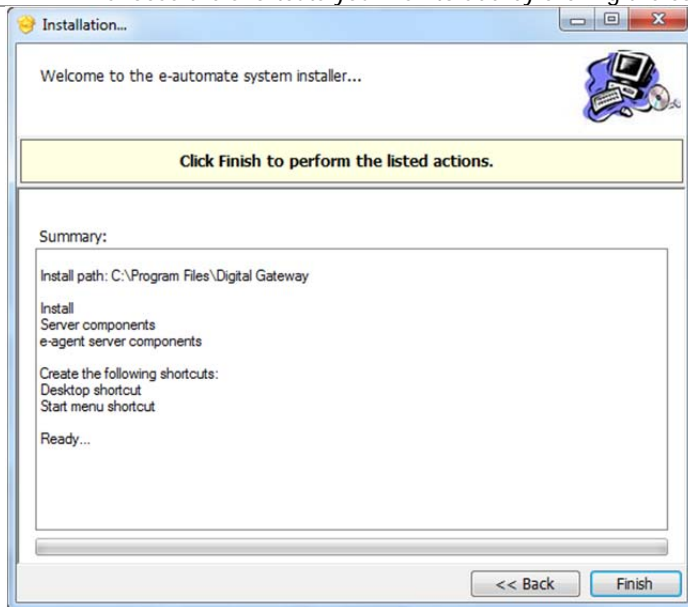
- Specify your **Install Path** and click [**Next>>**].  
**Note:** It is recommended that you install e-admin to the default directory; to choose a different location click [...] and select your desired location.

5



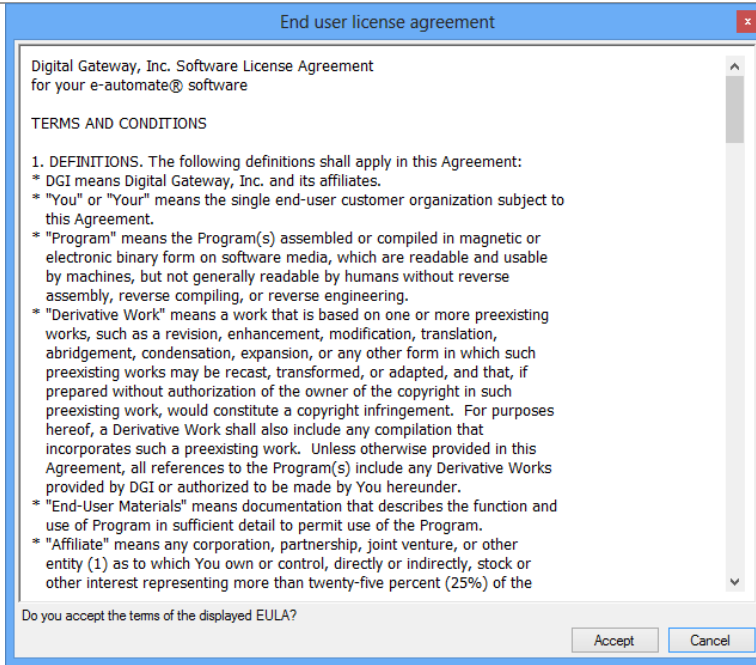
- Choose the shortcuts you wish to add by clicking the corresponding checkbox and click **[Next>>]**.

6



- Click **[Finish]** to perform the listed actions. The End User License Agreement window displays.  
**Note:** At any time during the installation you can click **[Back]** to return to a previous screen and modify the parameters.

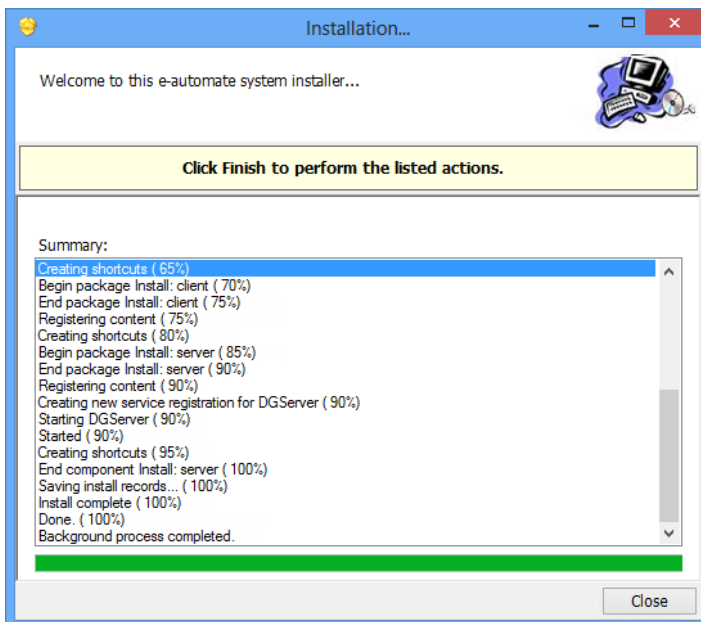
7



- Read the License Agreement and click **[Accept]**. If you click **[Cancel]** in the License Agreement window, the Install Wizard stops the installation.

8

The installer completes the installation and launches the e-admin login window.



- Click **[Close]** to exit out of the installation wizard.



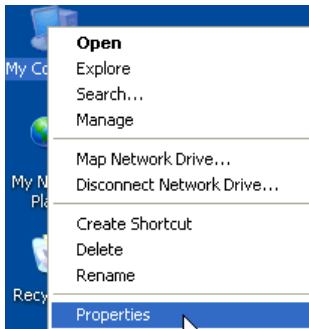
## Initializing e-admin

With Microsoft<sup>®</sup> SQL Server, or SQL Express installed, a sample database downloaded, and e-admin installed you are ready to initialize your server. Initialization prepares e-admin to work with either SQL Server or SQL Express. The first time you run e-admin, you will automatically begin the initialization procedure.

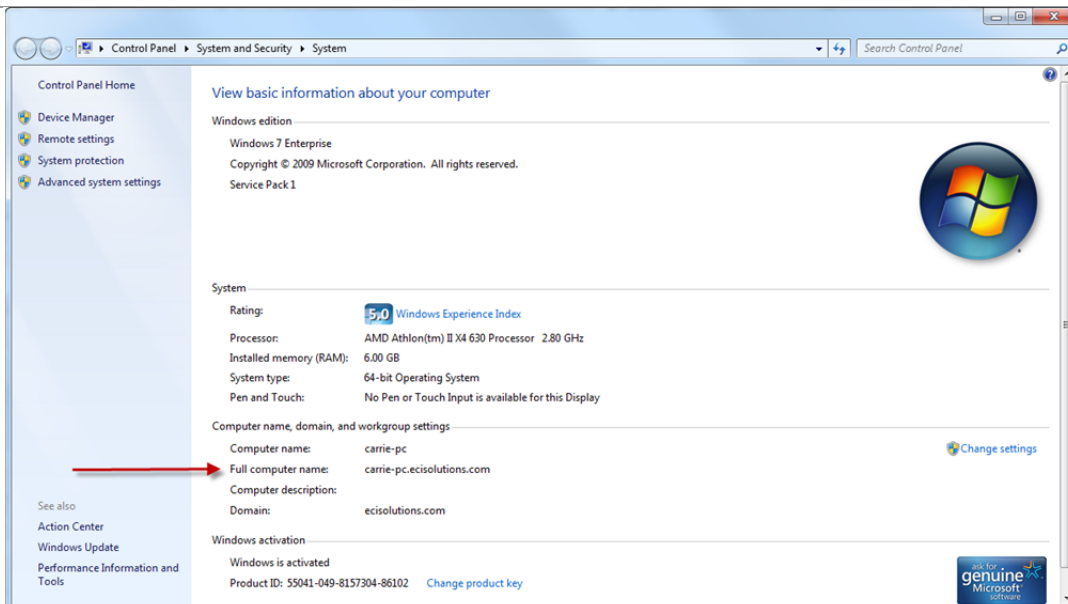
- 1 Before you log in to **e-admin** for the first time, you must know the name of your server. You can determine the name of your server by locating the *My Computer* icon located on your server's desktop.



- Right-click on the *My Computer* icon and select *Properties*. The View basic information about your computer window displays.



- 2

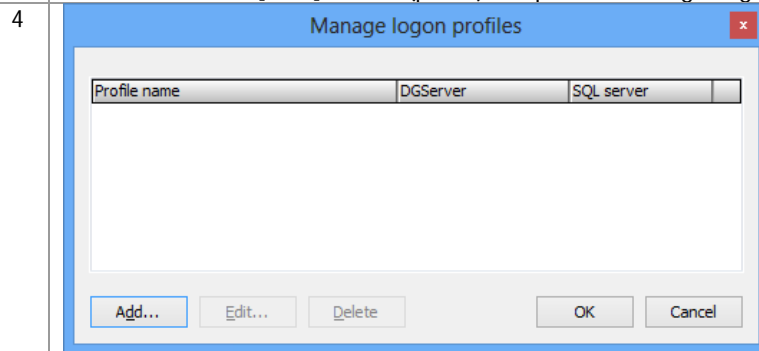


- Locate the full computer name. In the above example, the full computer name is `Carrie-PC.ecisolutions.com`. You only need to use the portion of the name before the first period, in this example, "Carrie-PC". Be sure you remember the exact name of the server.

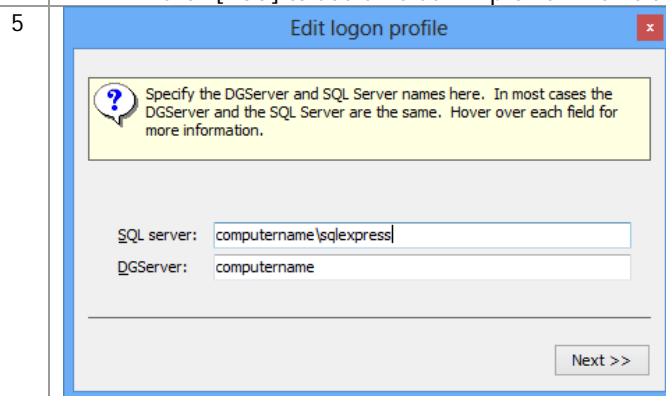
3 If you have just installed e-admin, the e-admin login window was launched at the completion of the installation. If you are launching e-admin for the first time, go to **Start>All Programs> Digital Gateway>e-admin** to open the e-admin login window.



- Click the **[Edit]** button (pencil) to open the Manage Logon Profiles window.

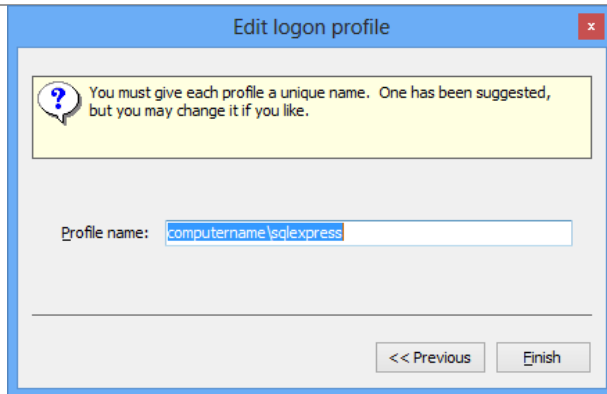


- Click **[Add]** to add an e-admin profile. The Edit Logon Profile window displays.



- Enter the name of your SQL Server in the **SQL server** field. Typically this is the name of your server determined in steps 1 and 2. The DGServer name automatically populates.  
**Note:** If you need to specify an alternate SQL server port, you must use the **cliconfig** utility from Microsoft to specify the port.  
**Note:** You can specify an alternate port to your DGServer using the **server:port** syntax.
- Click **[Next ]** to continue.

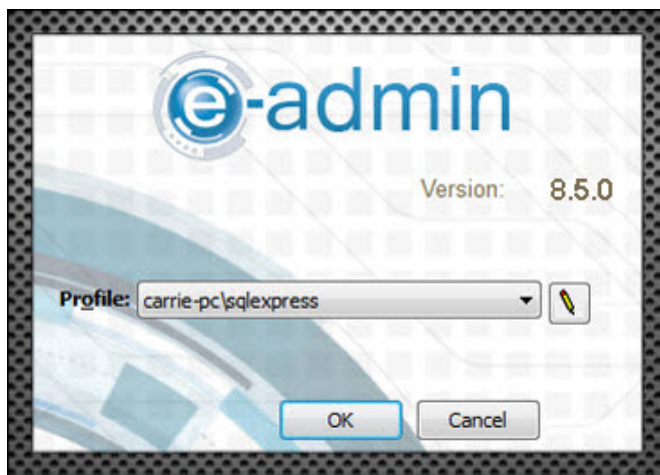
6



- In the **Profile name** field, enter a name by which this combination of SQL server and DGserver can be identified, or accept the suggestion provided and click **[Finish]** to return to the Manage Logon Profiles window.
- Click **[OK]** to close the window and return to the e-admin login window.

7

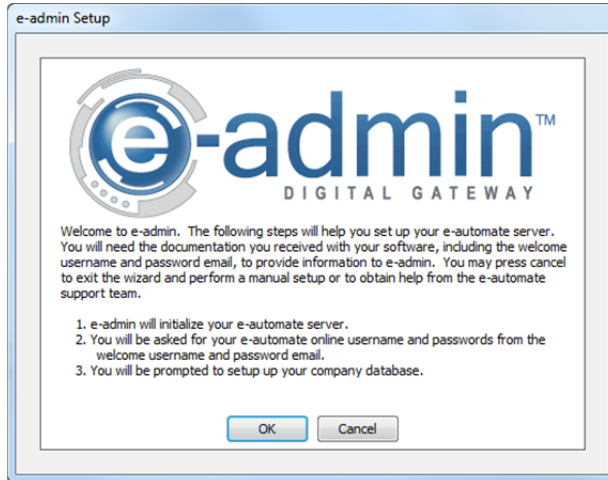
When you return to the e-admin login window, the profile you created will be selected in the Profile field.



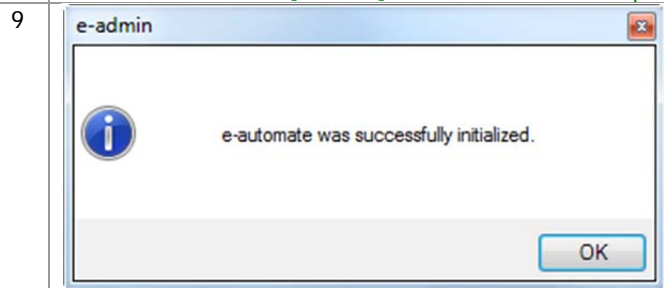
- Click **[OK]** to log into e-admin.



- 8 During login, e-admin examines the database to determine if the database is initialized. The first time you run e-admin, if the database is not initialized, the system will automatically begin the initialization process.



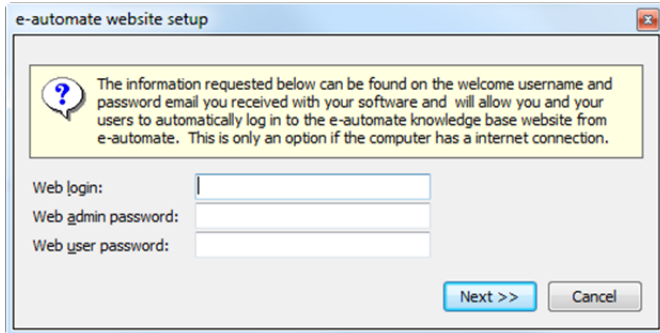
- Click **[OK]** to begin the initialization process. The e-admin window displays.  
**Note:** Click **[Cancel]** to exit the wizard and perform a manual setup at a later time.



- Click **[OK]** to acknowledge that e-automate was successfully initialized. The e-automate Website Setup window displays.

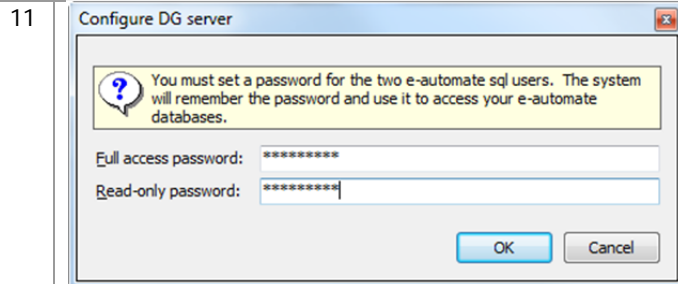


- 10 You should have received the Web Login, Web Admin Password, and Web User Password in an email shortly after your software purchase. If you do not have this information, contact Customer Care at 1-866-DGATEWAY. e-automate uses this information when you log into the online e-automate Customer Resource Center website. If you have entered the login and passwords here, the system will automatically log you in and you will not have to enter your login and password when accessing the online Customer Care website.



- Enter your web login in the **Web Login** field.
- Enter your admin password in the **Web Admin Password** field.
- Enter the user password in the **Web User Password** field.
- Click [**Next**]. The Configure DG Server window displays.

**Note:** The web login information is not critical to the installation of e-admin. If you choose to not set up your website with e-automate, simply click [Cancel] and you will move to the next step of initializing e-admin without any negative impact on the installation. You will have to manually secure your License Key if you choose to skip this step.



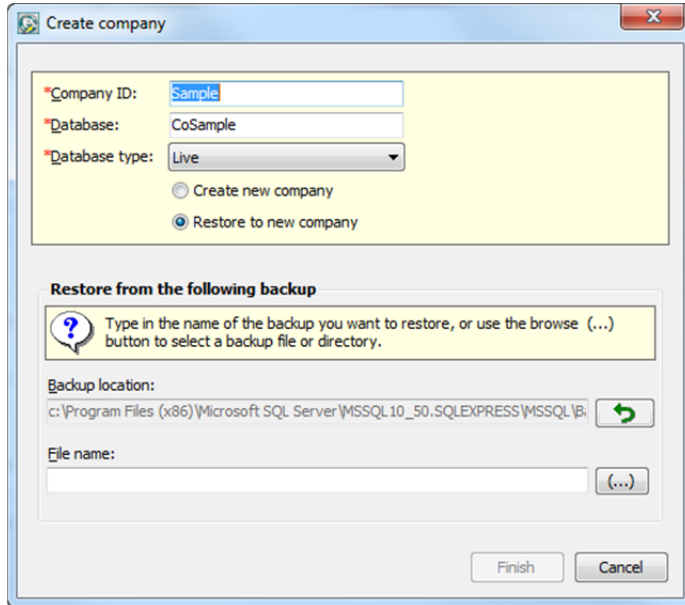
- Enter a password of your choosing in the **Full access password** field.  
**Note:** If your password isn't strong enough to meet the requirements, a warning dialog will appear with the required parameters.
- Enter a password of your choosing in the **Read-only password** field.  
**Note:** If your password isn't strong enough to meet the requirements, a warning dialog will appear with the required parameters.
- Click [**OK**]. The Create Company window displays.

- 12 You use this window to create a company in e-admin. The company is where you store all of your company information. It is recommended that all customers create a sample company that you can use for experimenting and testing prior to creating your usable company database.

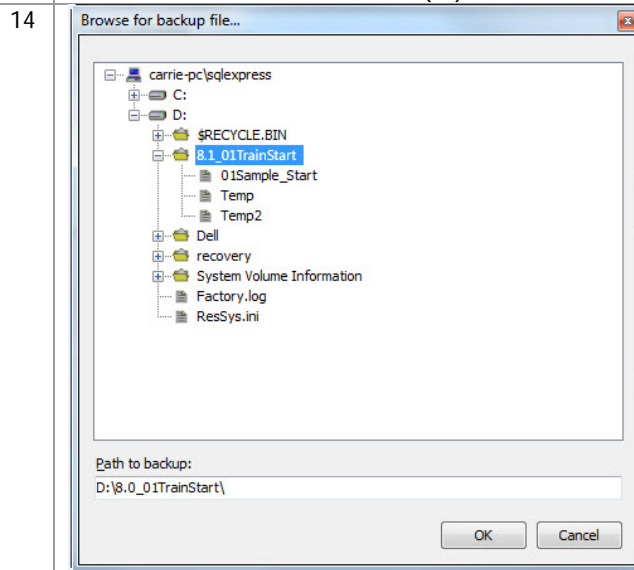
- Enter a name in the **Company ID** field. The **Database** field will automatically populate.
- Click on the dropdown in the **Database Type** field and select *Test*.
- Select the **Restore to New Company** radio button to create a sample company.

**Note:** To create a new company, please refer to e-admin Online Help for the **New company option** details.

- 13 Once the radio button is selected, e-admin changes the Create Company window. You use this window to create and restore a sample database all in one step.

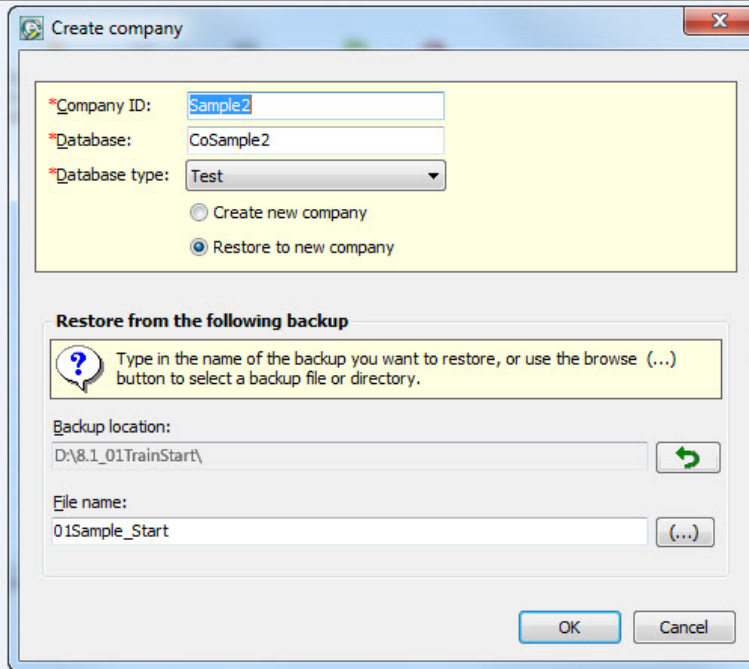


- Click the browse button (...) beside the **File name** field. The Browse for Backup File window displays.



- Use the (+) or the (-) beside the folders to navigate to the sample database in the location you specified in the *Downloading a Sample Database* section.
- Once you locate the previously downloaded sample database, select the **01Sample\_Start** database and click [OK]. e-admin returns you to the Create Company window.

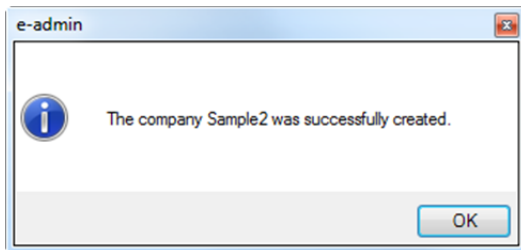
15



- To create the company and restore the **01Sample\_Start** database click **[OK]**.

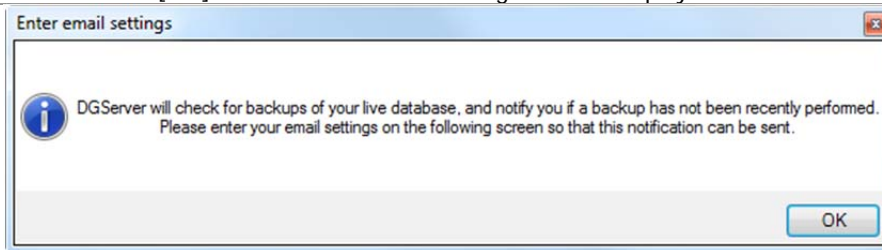
16

e-admin begins the company create and restore process. Once the company has been created and the database has been restored, the e-admin window is displayed.



- Click **[OK]** and the Enter Email Settings window displays.

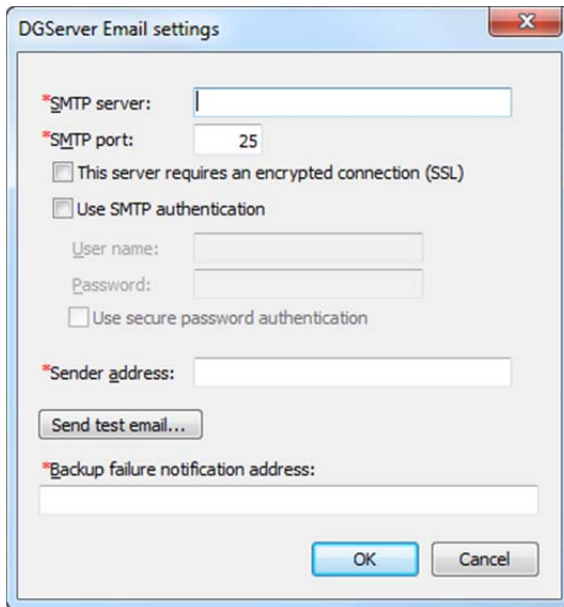
17



- Click **[OK]** to acknowledge the warning. The DGServer Email Settings window displays.

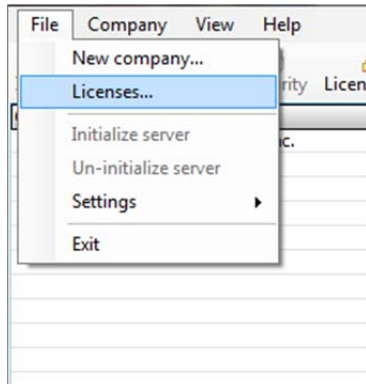
18 You use the DGServer window to configure e-admin to send reminders about your database backup status. The following is the reminder and email schedule associated with e-admin backups. If you have not backed up your database for:

- 1 day, e-admin does nothing
- 2 days, e-admin sends an email reminder
- 3 days, e-admin sends an email reminder
- 4 day, e-admin sends an email reminder and displays a reminder to admin users at e-automate login
- 5 days, e-admin sends an email reminder and displays a reminder to admin users at e-automate login
- 6 days, e-admin sends an email reminder and displays a reminder to all e-automate users at login



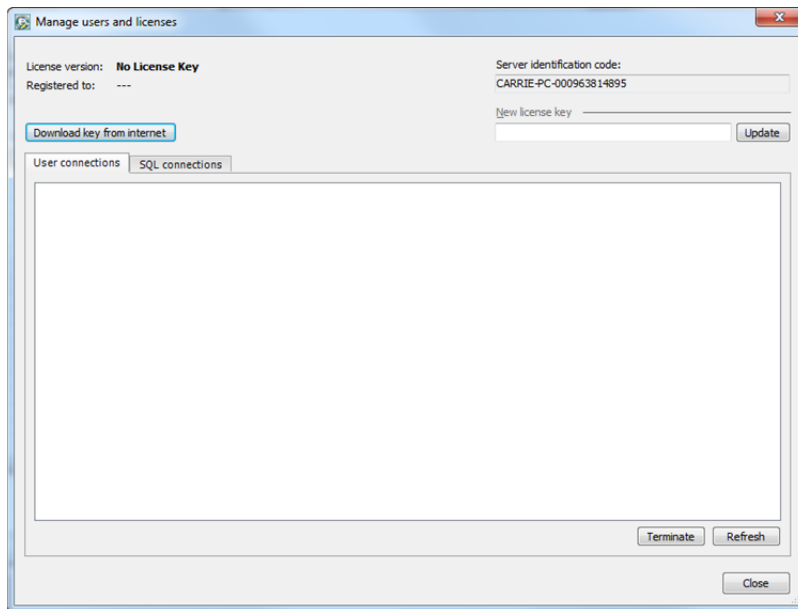
- Enter your SMTP server address in the **SMTP Server** field.
- Enter your mail port in the **SMTP Port** field. e-admin automatically enters port 25 which is the typical mail port, but you may change it as necessary.
- Check the **This server requires an encrypted connection (SSL)** checkbox if your email server requires encryption.
- Check the **Use SMTP authentication** checkbox to activate the **User name** and **Password** field if your email server requires authentication.
- Enter your mail user name in the **User name** field if necessary.
- Enter the password associated with your **User name** in the **Password** field, if necessary.
- Check the **Use secure password authentication** checkbox if your mail server uses secure password authentication.
- Enter the email address from which the backup reminder emails are sent in the **Sender Address** field.
- Enter the email address you want notified in the event that the e-automate databases are not backed up in the **Backup failure notification address** field.
- Click [**Send Test Email**] to send a test email. Click [**OK**] to acknowledge the test email in the **Test Email** window.
- Click [**Cancel**] to cancel your settings.
- Click [**OK**] to save your settings. The e-admin main window displays.

19 You will need to obtain your License Keys.



- Click **File>Licenses** from the e-admin main window. The Manage Users and Licenses window displays.

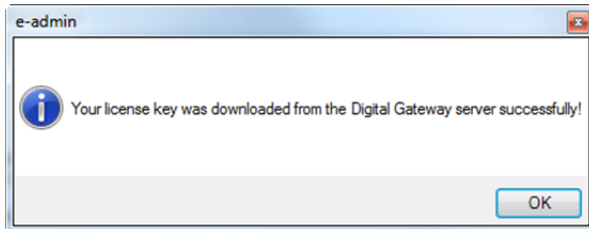
20 If you have set up your e-automate website login, you can download your license key from the internet in this window. If you have not set up your website login, the **Download key from internet** button will be grayed out and you will need to contact Customer Care to request a license key.



- Click **Download key from internet**. The Retrieving License Key window displays.

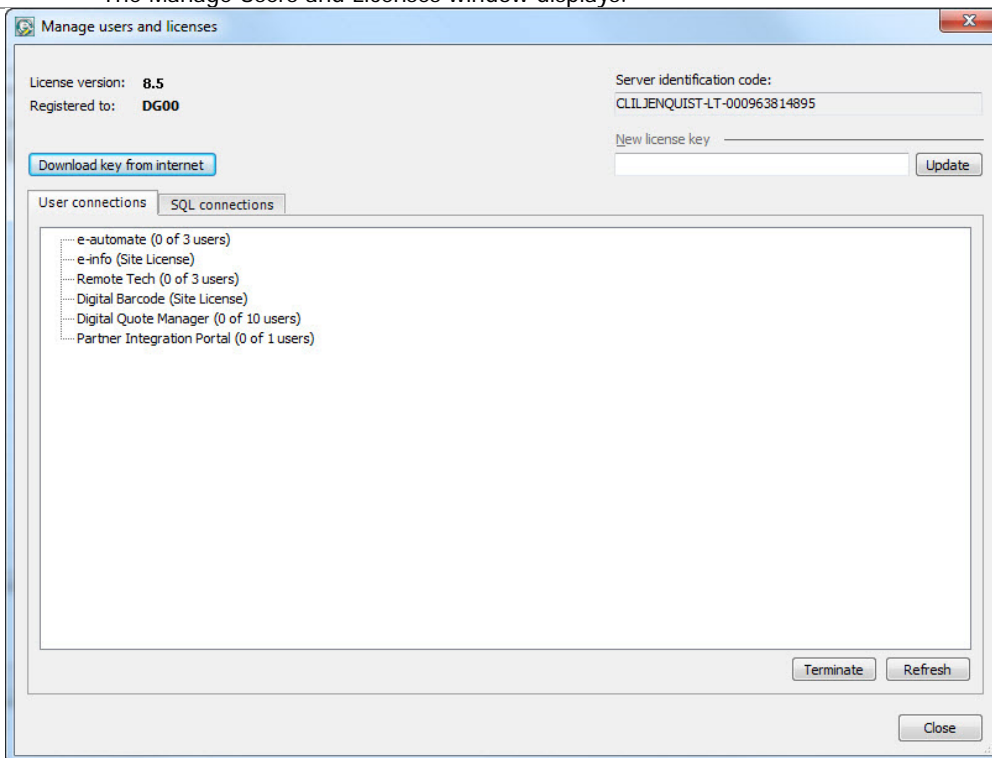


21



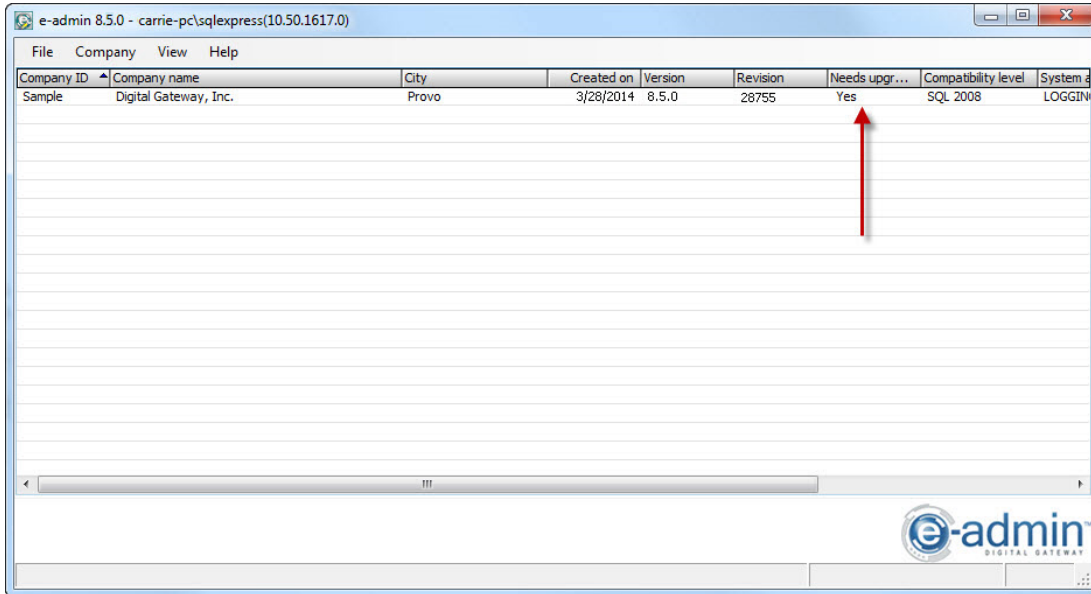
- Click [OK] when the e-admin window displays letting you know the key was downloaded successfully. The Manage Users and Licenses window displays.

22



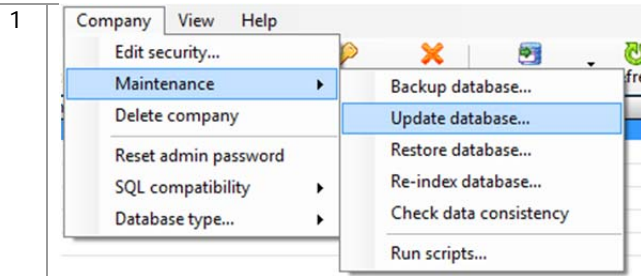
- Ensure that the correct number of licenses you purchased is reflected in the **User connections** tab. If there is a discrepancy, contact your e-automate Account Manager.
- Click [Close] or [X] out of the Manage Users and Licenses window.

23 If your database needs to be upgraded, you will see **YES** in the **Needs upgrade** column. Please refer to the steps in the following section, *Updating e-automate Databases* for this process.



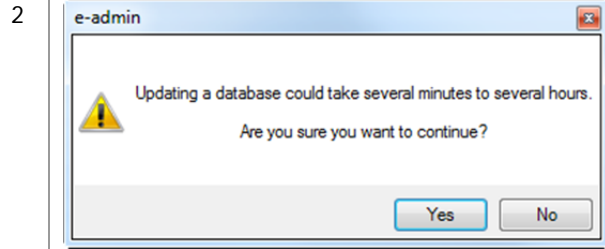
## Updating e-automate Databases

There is no sample database shipped with e-automate. When you download the sample database from the website, you will be required to update it after initializing e-admin. You use the **Update Database** activity to update e-automate databases. The database must be updated to the current version before you can log into the e-automate client. The version of the e-automate database is listed in the e-admin window in the **Version** column. If your database needs to be upgraded, you will see **YES** in the **Needs upgrade** column in the e-admin window.



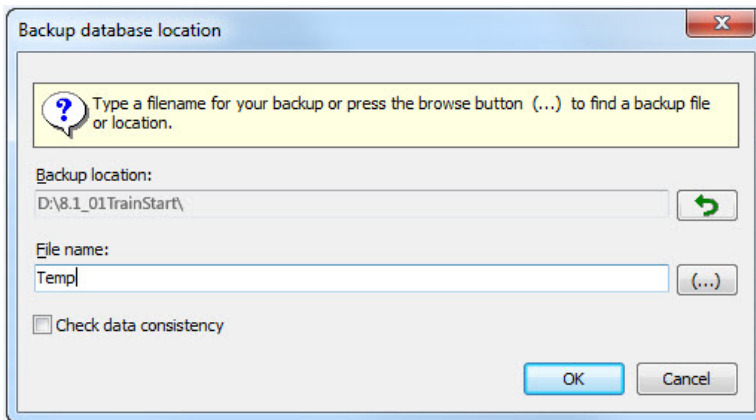
- Select the company database you want to update in the e-admin main window.
- Select **Company>Maintenance > Update Database**. The e-admin window displays reminding of the time it could take to update the database.





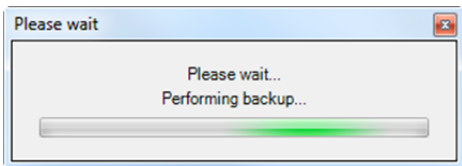
- Click **[Yes]**. The Backup Database Location window displays.

3 Before any update is run, e-admin backs up the database in case some unforeseen error occurs.

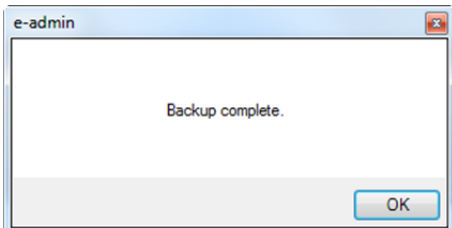


- Enter a name for your backup file in the **File name** field.  
**Note:** The backup file is stored in the **Backup Location** specified. If you want the backup stored in a different location, click the browse button (...) to specify a different location.
- Click **[OK]**.  
**Note:** If the file already exists, e-admin displays the Attention Required window stating you must enter a unique backup name. Select **[OK]** and enter a unique name.

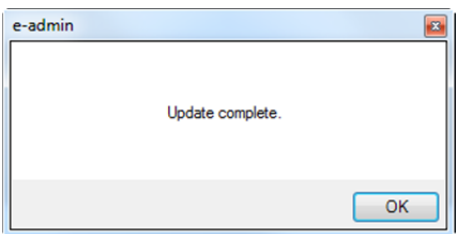
4 e-admin then backs up the database.



Once the backup is complete, e-admin displays the Backup Complete window.



- Click **[OK]**.

5	<p>e-admin begins updating the database by running update scripts. e-admin runs each necessary script in succession until the database is completely updated to the current version you have installed.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;">  </div> <ul style="list-style-type: none"> <li>• Click [OK] and the database is updated.</li> </ul>
---	---

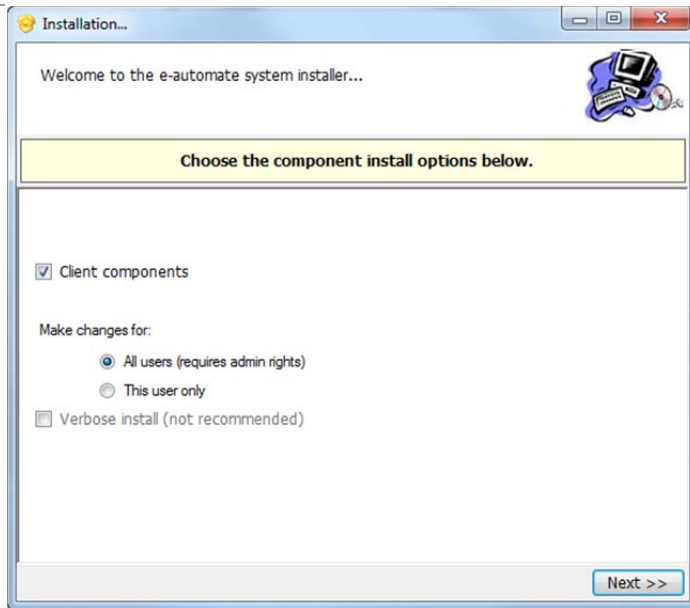
## Installing e-automate

Once you have configured the server and e-admin, you can then install the e-automate client on your various workstations. You can install e-automate on as many workstations as you like; e-admin and the DG Server will manage how many users can be connected to the database at one time. Be sure you install the e-automate client on your workstations and not the server.

1	Secure the download file from Customer Care. Customer Care can route you to your account manager or provide you with the instructions to obtain the software.
2	<p>Locate the <b>e-automateClientSetup.exe</b> file to begin installation. To make this file available on other computers, you can:</p> <ul style="list-style-type: none"> <li>• Share this directory and make it accessible from other computers on your network.</li> <li>• Copy the client installation file, <b>e-automateClientSetup.exe</b> to a CD or flash drive that you take from client to client.</li> <li>• Copy the client install file, <b>e-automateClientSetup.exe</b> to a shared company network drive accessible from all intended client computers.</li> </ul>
3	<ul style="list-style-type: none"> <li>• From the client machine, use one of the above methods to access <b>e-automateClientSetup.exe</b>. Double-click on the file to begin the installation. The Welcome window displays.</li> </ul>

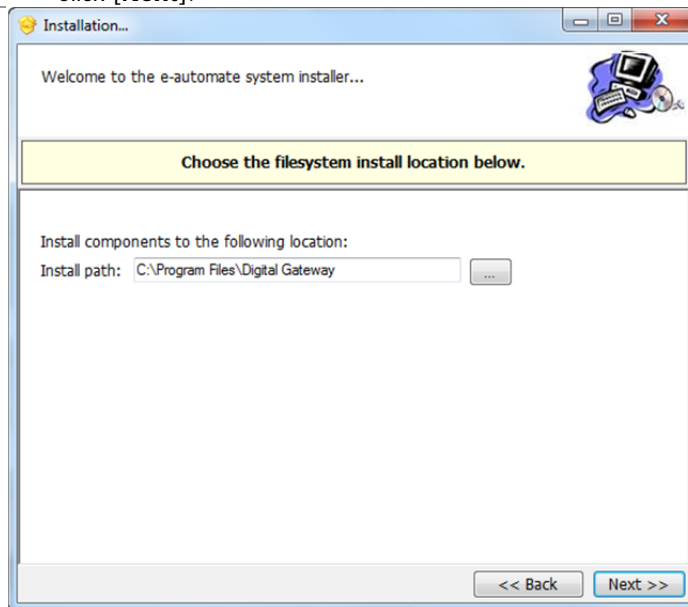


4



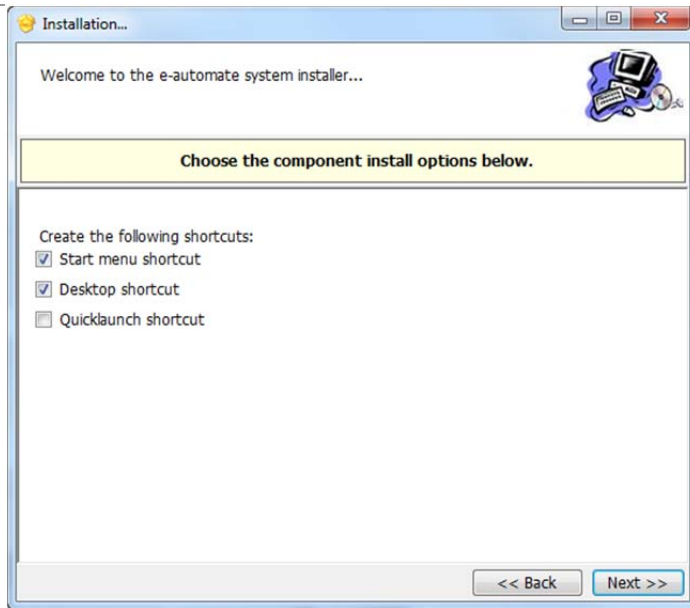
- Ensure that **Client components** is checked.
- Ensure that **All users (requires admin rights)** is selected.  
**Note:** This is the default setting. You can change it to **This user only** according to your company policies.
- Click **[Next]**.

5



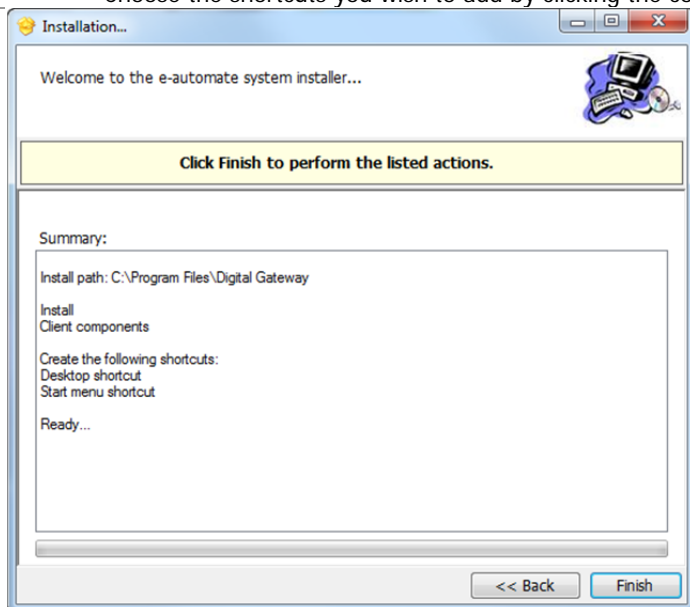
- Specify your **Install Path** and click **[Next]**.  
**Note:** It is recommended that you install e-admin to the default directory; to choose a different location click [...] and select your desired location.

6



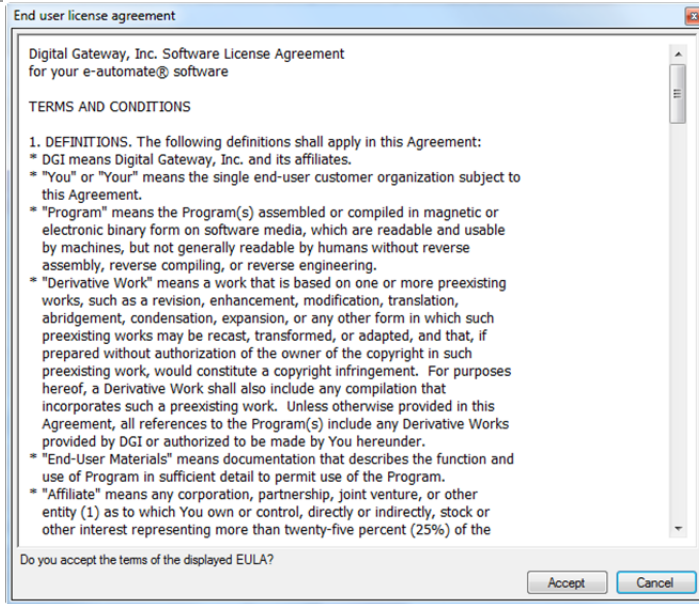
- Choose the shortcuts you wish to add by clicking the corresponding checkbox and click **[Next]**.

7



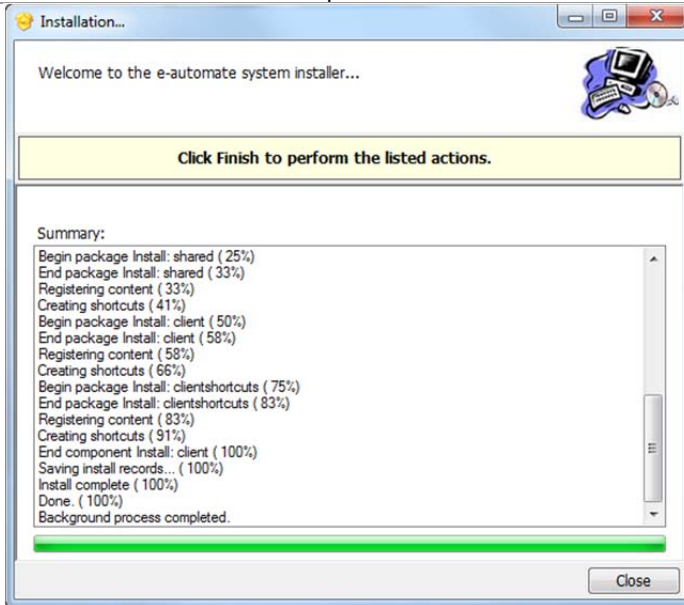
- Click **[Finish]** to perform the listed actions. The End User License Agreement window displays.  
**Note:** At any time during the installation you can click **[Back]** to return to a previous screen and modify the parameters.

8



- Read the License Agreement and click **[Accept]**. If you click **[Cancel]** in the License Agreement window, the Install Wizard stops the installation.

9



- Click **[Close]** to exit out of the installation wizard.

## Logging into e-automate Sample

Once you have installed SQL Server or SQL Express, e-admin, a sample database, license key, and e-automate client, you can log into the sample database and take a look around.

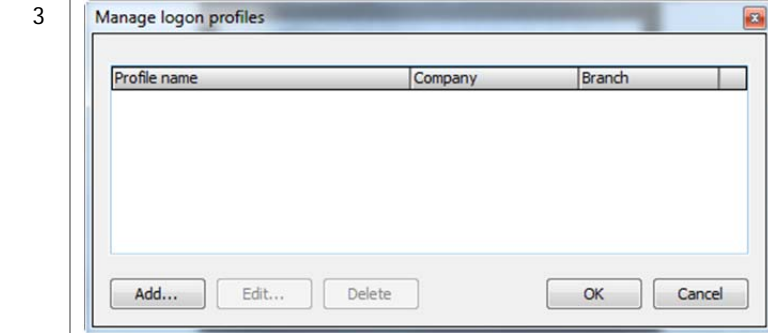
1

- Select **Start > All Programs > e-automate** from the client workstation start menu. The e-automate logon window displays.

2 e-automate uses logon profiles to manage login information. The first time you log into e-automate you need to create a logon profile. You should consider creating two, one for the sample database or testing database and one when you get your live company database running. You can create as many as necessary. Before you can create a logon profile you must enter the user name.



- Enter *Admin* in the **User ID** field.
- Leave the **Password** field blank.
- Click the **Edit** icon (Pencil). The Manage Logon Profiles window displays.



- Click [**Add**]. The Edit Logon Profile window displays.

4

- Enter the name of the SQL Server on which you installed e-admin in the **SQL server** field. The DGServer name automatically populates.
- Click [**Next**] to continue.

5

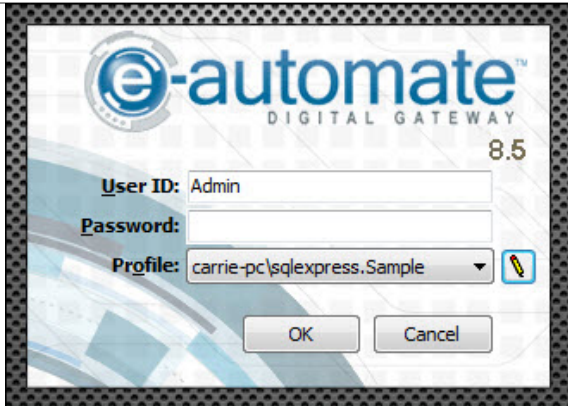
- In the **Company** field, use the down arrow to select **Sample** if not the default.
- Click [**Next**] to continue.

6

- In the **Profile name** field, accept the name suggested or enter a new name to describe this profile.
- Click [**Finish**] to complete the profile.
- Click [**OK**] to close the Manage Logon Profiles window and add your new profile to the e-automate login window.



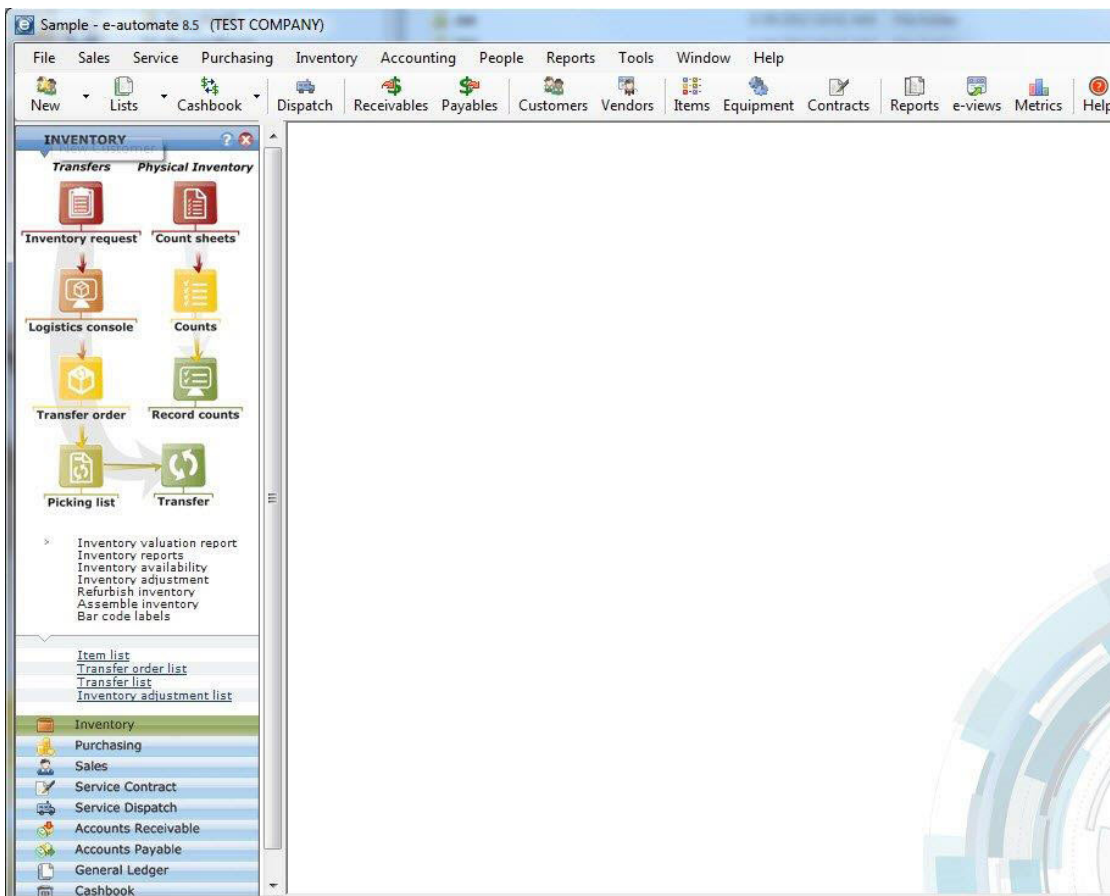
7



- In the **User ID** field, enter *Admin*.
- Leave the **Password** field blank.
- In the **Profile** field, verify your created profile is displayed, use down arrow to change as necessary.
- Click **[OK]** to login to e-automate.

8


e-automate displays the e-automate window.





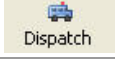


9 Below are a few areas you can explore.

To see **Customers**, click the **Customers**  button.

To see **Vendors**, click the **Vendors**  button.

To See the **Accounts Receivable Console**, click the **Receivables**  button

To see the **Dispatch Console**, click the **Dispatch**  button.