AutoData Systems

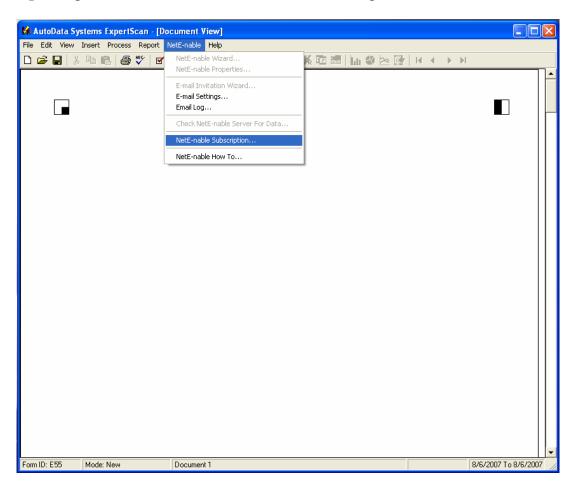


Instructions

Version 1

Subscribing to NetE-nable for the First Time

1. **Open** ExpertScan and click on the **NetE-nable** menu option.



2. Click on the **NetE-nable Subscription...** menu item and follow the instructions in the dialog box.

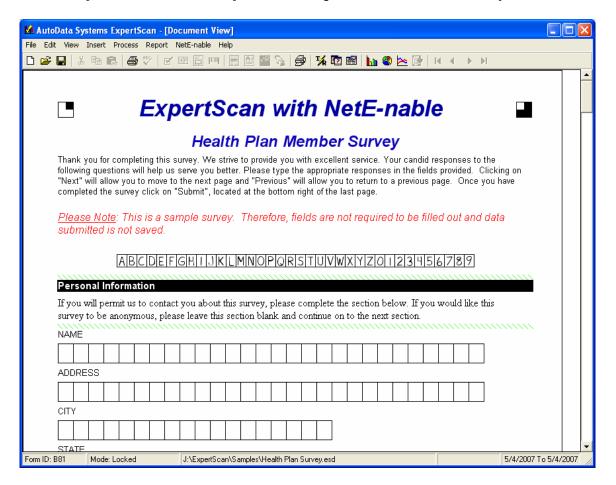


3. Immediately e-mail sales@autodata.com or phone AutoData at 800-662-2192 and provide the Subscriber ID number you copied. An AutoData representative will e-mail or phone you, verifying that your Subscriber ID number has been received and that your NetE-nable Software License is operational.

NetE-nabling a Form

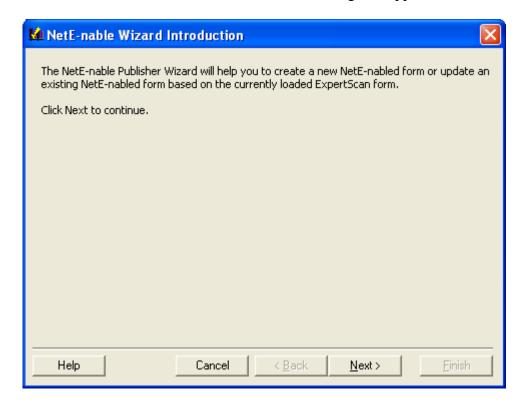
1. **Open** the form you want to NetE-nable.

Note: The form must be saved before it can be published to the Internet by the NetE-nable Wizard.



2. Click on the **NetE-nable** menu and choose **NetE-nable Wizard...**

3. After the **NetE-nable Wizard Introduction** dialog box appears, click **Next**.



4. In Step 1, enter the dates during which the NetE-nable form will be available on the web.

Note: Web data can be downloaded anytime between the open date and up to 30 days after the close date.



5. Step 2 allows for creation of an optional Welcome Message to be displayed on the first page of the NetE-nabled form. Click the **Edit** button to create a custom welcome message. For help on editing the welcome message, please see <u>Creating and Editing a Welcome Message</u>. If no welcome message is created, the person filling out the form will go directly to the first page of the form.



6. Step 3 allows for creation of an optional Thank You Message on the last page of the form. Click the **Edit** button to create a thank-you message. For help on editing the Thank You Message, see <u>Creating and Editing a Thank You Message</u>.



7. In Step 4, enter the e-mail address of the person who needs to be informed if there are any issues with the NetE-nabled form. This e-mail address is usually that of the form creator or administrator.

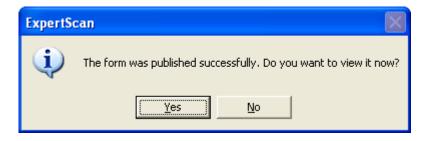


8. Click **Next.** The **NetE-nable Wizard Finished** dialog box will appear. Click **Finish** to publish the NetE-nable form to the Internet.



9. A message box will indicate that the NetE-nabled form has been published to the Internet successfully, and will give you the opportunity to view it.

Note: It is a good idea to view the form to make sure it is as you expected.



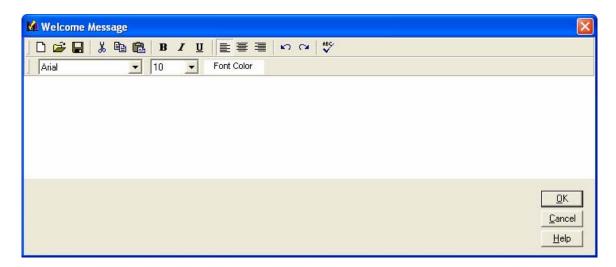
10. NetE-nabling the form is now complete.

Creating and Editing a Welcome Message

1. In Step 2 of the NetE-nable Wizard, click the Edit button.

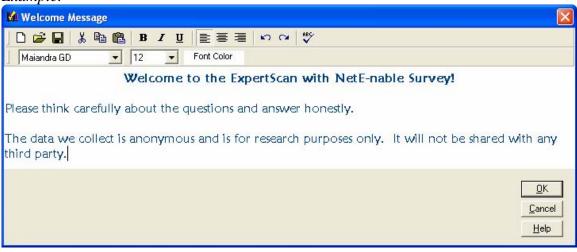


2. Type your welcome message in the **Welcome Message** dialog box.



- 3. For help editing text, see the ExpertScan Help topic Working with Element Text.
- 4. When finished, click **OK** to return to the **NetE-nable Wizard**.

Example:

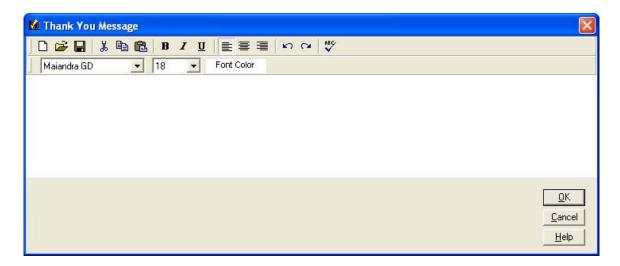


Creating and Editing a Thank You Message

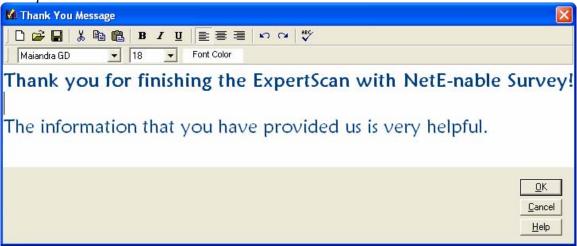
1. In Step 3 of the **NetE-nable Wizard**, click the **Edit** button.



- 2. Type your thank-you message in the **Thank You Message** dialog box.
- 3. For help editing text, see the ExpertScan Help topic **Working with Element Text**.
- 4. When finished, click **OK** to return to the **NetE-nable Wizard**.



Example:



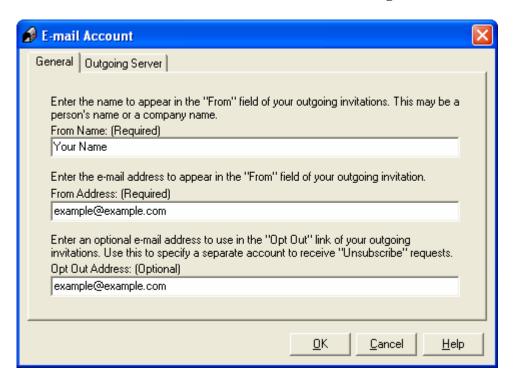
Updating a NetE-nabled Form

1. After changes have been made to the form in ExpertScan, rerun the **NetE-nable Wizard** to update the published form.

E-mail Account Settings

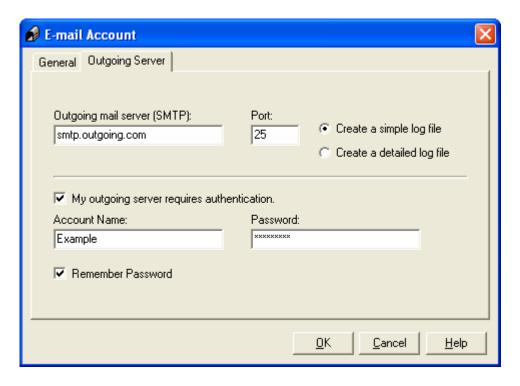
Note: Before sending e-mail invitations, you must set your e-mail settings.

1. Click on the NetE-nable menu and choose E-mail Settings...



2. Under the General tab, in the From Name field, type the name of the person/party sending the email invitations. The From E-mail Address field requires the e-mail address of the person sending the e-mails to the various recipients. If the Opt Out E-mail Address field is different than the From E-mail Address, type it in this field. The e-mail address in this field will receive "Unsubscribe" requests.

3. Under the **Outgoing Server** tab, type the name or IP address of your mail server in the **Outgoing mail server** (**SMTP**) field as well as the port number in the **Port** field. (If you do not know these settings, contact your network administrator.)

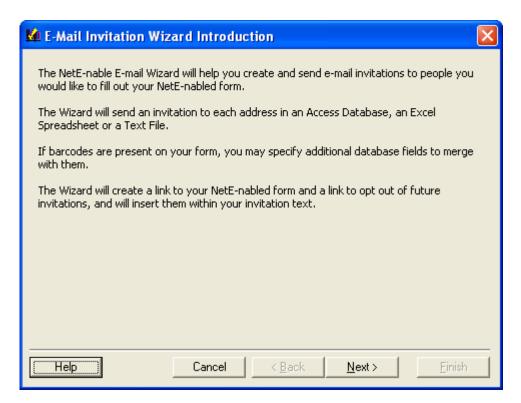


4. In the **Account Name** and **Password** fields, type the user name and password for your mail account (if authentication is required)

Note: It is recommended that the **Create a simple log file** be kept as the default unless you are told otherwise by AutoData technical support.

Sending E-mail Invitations

- 1. **Open** the form for which you would like to send e-mail invitations.
- 2. Click on the **NetE-nable** menu and choose **E-mail Invitation Wizard...**



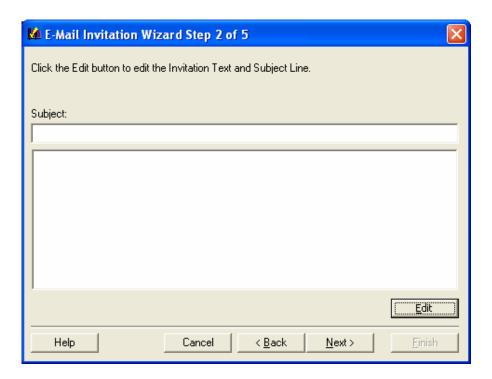
3. After reading through the first screen, click Next.

4. In the **From Name** field, type the name of the person/party sending the e-mail invitations. The **From E-mail Address** field requires the e-mail address of the person sending the e-mails to the various recipients. If the **Opt Out E-mail Address** field is *different* than the **From E-mail Address**, type it in this field. The e-mail address in this field will receive "Unsubscribe" requests.

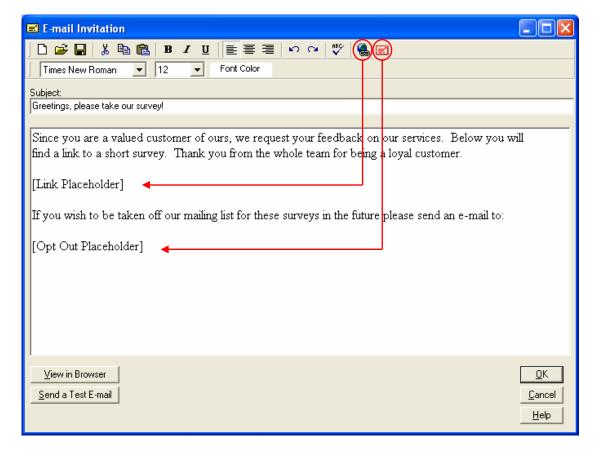


5. Click **Next** to continue.

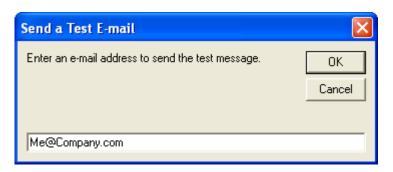
6. Step 2 displays the subject and body of the e-mail invitation. If the two fields are blank or if they do not contain the text you want to send, click **Edit.** Otherwise, click **Next** and skip to number 11 of these instructions.



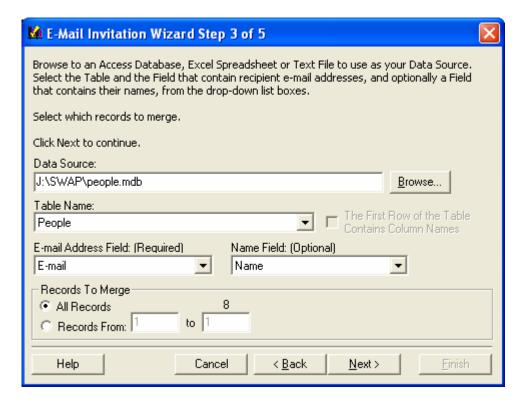
7. Type the subject in the **Subject** box and then type the e-mail body text in the large white space.



- 8. The body text must contain a [Link Placeholder] and an [Opt Out Placeholder], both of which can be placed with the icons shown above.
- 9. After you have typed the e-mail content, you can view the body of the e-mail in your default web browser by clicking on **View in Browser** and/or you can send a test to a desired e-mail address (shown below) by clicking on **Send a Test E-mail.**

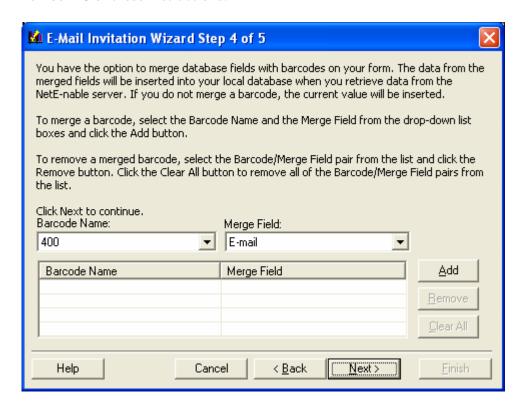


- 10. Once you are satisfied with the content of your e-mail invitation, click **OK** to return to the **E-mail Invitation Wizard**.
- 11. Click **Next** to move to the next step.
- 12. In Step 3, enter the appropriate information for each field. Reference the table below for information about the various fields.



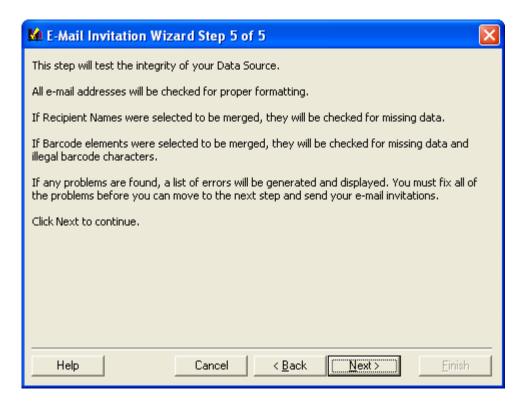
<u>Field Title</u>	<u>Value</u>
Data Source:	Browse to an Access database, Excel
	spreadsheet, or Text file that contains a list
	of addresses for the invitations.
Table Name:	Select the table that contains the list of e-
	mail addresses.
The First Row of the Table Contains	If this box is checked, the first row of the
Column Names	table will be used as the fields names.
E-mail Address Field: (Required)	Choose the field or column that contains
	the list of e-mail addresses.
Name Field: (Optional)	You have the option to include the field or
	column name that contains a list of names
	corresponding to the e-mail addresses.
Records To Merge	In this section you can choose to send the
	e-mail to All Records, meaning every e-
	mail address, or only Records From a
	subset of records.

- 13. Once you have filled in all of the required information, click **Next** to continue.
- 14. If you have barcode fields on your form, you will see the step below. If you do not, then skip to number 18 of these instructions.



15. On this screen you can merge data with the barcode field(s) on your form. This is helpful if you would like to track who is filling out the form, where they are located, etc. This step is optional.

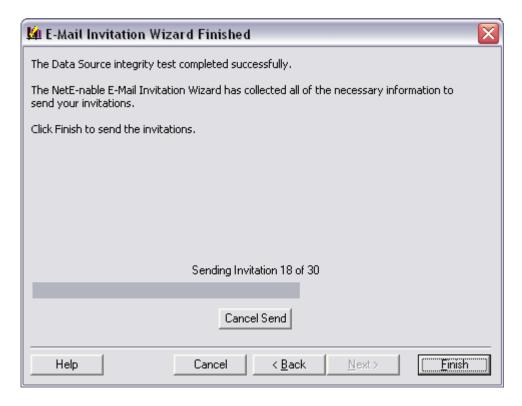
- 16. In the **Barcode Name** drop down list, choose the name of the barcode to merge, and in the **Merge Field** drop down list, choose the field or column name that has the data to be merged with the corresponding barcode. After these fields are filled in, click **Add.** Continue this process for each bar code.
- 17. Click **Next** to continue.
- 18. In Step 5, the Wizard will check the data in your database, spreadsheet, or text file to ensure it is valid.



- 19. Click **Next** to check the database, spreadsheet, or text file.
- 20. If there are any errors, the following message box will appear. Click **Yes** to view the log. You must correct the errors before you can send your invitations.



21. If there are no errors the **E-mail Invitation Wizard Finished** screen will appear. Click **Finish** to send the e-mail invitations.



- 22. A progress bar will appear showing you the progress of your e-mails.
- 23. You may cancel the process of sending e-mails by clicking on the Cancel button.
- 24. When the process is completed, a message box will appear indicating the number of e-mails sent. If errors occurred, a message box will appear indicating the number of errors.

Retrieving Data

- 1. **Open** a previously published form.
- 2. Choose Check NetE-nable Server For Web Data from the NetE-nable menu.
- 3. The **Retrieve Data from NetE-nable Server** message box will appear.



- 4. Click on Check.
- 5. A new window will display the number of unretrieved records on the NetE-nable server. Click **Yes** to retrieve the records.

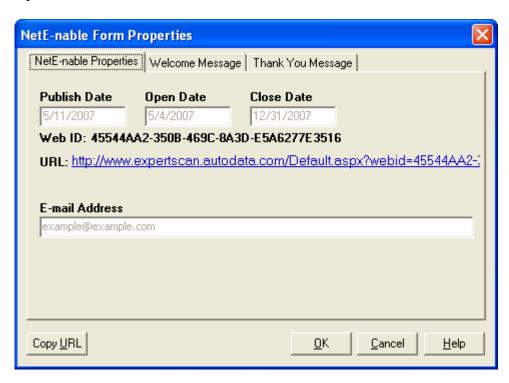


6. A message box will indicate the number of records retrieved. Click the **Close** button to close the **Retrieve Data** dialog box.

Note: At this point the data has been written to the local database exactly as if it had been scanned.

NetE-nable Form Properties and Finding Your URL

1. Open a NetE-nabled form and under the NetE-nable menu choose NetE-nable Properties.



- 2. This dialog box shows the properties of the NetE-nabled form that has been published to the Internet.
- 3. The following information can be found under the **Web Properties** tab.

Publish Date	Shows the date that the form was last
	NetE-nabled.
Open Date	Shows the first date that the form will be
	available online.
Close Date	Shows the last date that the form will be
	available online.
Web ID	This is the unique ID number for the NetE-
	nabled form.
URL	This is the web address of the NetE-nabled
	form. You can create a link to this on your
	own website or paste it into an e-mail if
	you use your own e-mail program to send
	invitations.
E-mail Address	This is the e-mail of the person to contact if
	there is an issue with the form.

- 4. Click on the **Copy URL** button to copy the URL for the NetE-nabled form.
- 5. Under the **Welcome Message** and **Thank You Message** tabs, a preview of the welcome and thank-you pages can be found.