

# Upgrading WiredContact for ACT! to WiredContact Enterprise

## *Installation Guide*



**WIREDCONTACT**

# WiredContact Enterprise x3 Upgrade Installation Guide

This guide explains how to install WiredContact Enterprise x3 for customers upgrading from WiredContact for ACT!.

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## Revision Date

Updated January 31, 2012

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## Before You Begin – Upgrading to WiredContact Enterprise

This document provides an overview on the WiredContact Enterprise Upgrade process. The WiredContact Enterprise x3 Upgrade is designed to allow testing of a converted ACT! database before going live. WiredContact for ACT! and WiredContact Enterprise x3 can coexist on the same server during and after the conversion to WiredContact Enterprise.

The Upgrade can be installed for use in the following ways:

- **Test, then upgrade to a production environment:** With this process, you perform a test of the database conversion to make sure the conversion process is complete and error free, then test the logins and data to ensure that your upgrade process will have minimal impact on your production environment. Once you have an idea of how long the conversion process will take, plan for the conversion to your live production environment, then proceed with the conversion.

**-- OR --**

- **Install WiredContact Enterprise to your production environment:** With this process, the WiredContact Enterprise upgrade is installed for immediate use with your live converted database.

**Please note – the WCE upgrade is designed to work with your existing templates and will look similar to, or exactly like, your existing production environment. If you run both systems in parallel to test, ensure that you and your users know which site they are working in. Accidentally using your test site for entering production data will cause a loss of data when you convert your production environment to WiredContact Enterprise. Additionally, keeping your WiredContact for ACT! site live after you upgrade to Enterprise has the potential of confusing your users should they log into the wrong site..**

As with any new major upgrade in software, it is recommended that a test be performed on the installation and database conversion process prior to using in a production environment.

The following outline summarizes our recommended process for handling a conversion of WiredContact for ACT! x3 to WiredContact Enterprise. When you are ready to go live, the steps outlined below enable the seamless use of WiredContact Enterprise with your existing web address, HTML templates, attachments and library documents.

**IMPORTANT: The ACT! conversion can only be done on a server where ACT! is installed.**

## **For WiredContact Enterprise Testing**

1. Perform a backup of the ACT! database and the WiredContact for ACT! installation folder.
2. Download and install WiredContact Enterprise to the default location.
3. Install the WiredContact Service Application from the WiredContact Enterprise installer:
  - a. Open the Computer Management console (right click you're my Computer Icon, select Manage).
  - b. Expand Services and Applications and select Services. On the right side of the console, navigate to the WiredContact Service Application. Right click on WiredContact Service Application and select Properties
  - c. Note the "Path to executable" property.
  - d. Click on the Logon tab and note the user.
  - e. Then close the Properties dialog and stop the WiredContact Service Application. Then close the Computer Management console.
  - f. Navigate to the folder noted in the "Path to executable" property, and double click the "Uninstall WiredContact Service.bat" file. You should get a message indicating success.
  - g. Navigate to the new WiredContact Enterprise folder (\inetpub\wirede by default) and double click on the "Install WiredContact Service.bat" file.
  - h. Open the Computer Management console, navigate to Services, and then the properties for the WiredContact Service Application. Go to the Logon tab and set the user to the original WiredContact Service Application service user.
  - i. Start the WiredContact Service Application if it's not already started.
4. Create a temporary virtual directory using the WiredContact IIS Control tool.
  - a. The WiredContact IIS Control tool will open automatically after the installation is complete. The anonymous user should match the anonymous user on your existing WiredContact for ACT! virtual directory.
5. Convert the ACT! database. Test and verify the data conversion was successful.

All data will convert to the new database, but attachments and library documents will not be available unless you perform the additional steps in 4a and 4b. You only need to perform these steps if you need to see attachments and library documents for your test. When you upgrade your existing WCA install to WCE, these steps will not be necessary.

  - a. **Move Attachments to new Wirede path:** Copy the attachments from the existing folder (default: wiredx3\attachments) to the new WCE folder (default: wirede\attachments). Then, from the Admin...Site...Misc Settings tab, use the "Change Attachment Paths" link to bring up the Change Attachment Path dialog. Put in the Original Attachment Path (default: c:\inetpub\wiredx3\attachments) and the New Attachment Path (default: c:\inetpub\wirede\attachments) and click the save button. If you are unsure of your existing attachment paths, use the Site Settings... Trouble Shooting... SQL link and execute the "Attachment Paths" example under the History SQL Templates.

## OR

**Keep existing attachment path:** You can keep your existing attachment path. To make the existing attachments available to the WCE install, create a new virtual directory under the virtual directory created in step 3. Use a new name (x3attachments for example) and use the path that is the current WCA X3 attachment path (default is c:\inetpub\wiredx3\attachments). Then, in the WCE... Admin... Site Settings... Misc Settings, identify the new Attachment Physical path (in this example: c:\inetpub\wiredx3\attachments) and Attachment Virtual Directory (in this example: x3attachments).

- b. **Move Library to new WiredE path:** Copy both the Library and Private folders from the existing folder (default: wiredx3\library and wiredx3\private) to the new WCE folder (default: wirede\library and wirede\private).

## OR

**Keep existing Library path:** You can keep your existing library path.

To make the existing library documents available to the WCE test install, create a new virtual directory under the virtual directory created in step 3. Use a new name (x3library for example) and use the path that is the current WCA Library path (default is c:\inetpub\wiredx3\library). Then, in the WCE... Admin... Site Settings... Misc Settings, identify the new Library Path (in this example: c:\inetpub\wiredx3\library) and Library Virtual Directory (in this example: x3library).

6. If applicable, copy and paste customized HTML templates from the WiredContact for ACT! directory to the WiredContact Enterprise installation. (customized templates will have a date/time stamp after Feb, 2003)

\*\*\* FOR WIREDCONTACT ENTERPRISE TESTING, STOP HERE and login to your WiredContact Enterprise site. \*\*\*

## **For Going Live with WiredContact Enterprise**

The following instructions are for installing WCE into the existing Wiredx3 folder/virtual directory. If you are happy with the Wirede folder/virtual directory, and have copied over the libraries and attachments, you can change the properties of your Wiredx3 virtual directory so they point to the WiredE folder. If you want to use your existing Wiredx3 folder and virtual directory, perform the following steps.

Once testing of WiredContact Enterprise is complete, use the following steps to convert WCE for a production environment. **The following steps enable the seamless use of WiredContact Enterprise with your existing web address, HTML templates, attachments and library documents.**

**IMPORTANT: If WiredContact for ACT! was used and updated during testing of WiredContact Enterprise, perform a fresh conversion of the database. The following steps should take place:**

1. From the Admin Console, click on the "System Settings" link and delete the wces\_users table and the wces\_settings table. It is not necessary to delete any of the other system tables, but you may if you wish. Click the Verify System Tables link to rebuild any deleted tables.

**NOTE:** If you already are using a WiredContact Enterprise site in production with the same System database, do not delete any of the system tables.

2. From the Admin Console, click on the “Site Settings” link and delete all of the site tables. The wce\_dropdowns table is re-created automatically. If you’re unsure as to whether you have deleted the wce\_dropdowns table or not, just click on the delete icon for the wce\_dropdowns table. Note that as soon as it has been deleted, it will be recreated and shown as if it hasn’t been deleted. Clicking on the delete icon does in fact delete and recreate this table.

**NOTE:** If you already are using a WiredContact Enterprise site in production with the same Site database, do not delete any of the site tables.

3. Run the WC Directory Manager (Start→Programs→WiredContact Enterprise→WC Directory Manager) and populate it as follows:
  - a. The folder where WiredContact was initially installed is the new WiredContact Enterprise physical directory. (Default is **C:\inetpub\Wirede**)
  - b. The folder that needs to be updated is the existing WiredContact for ACT! physical directory. (Default is **C:\inetpub\WiredX3**)
  - c. Keep all boxes unchecked and click “Update target folder”
4. Perform a fresh conversion of the ACT! database.
5. In the Computer Management screen, locate Internet Information Services and find the virtual directory for the existing WiredContact for ACT! site. (Default is **WiredX3**)
6. Right click on the virtual directory and choose “Properties”.
7. Select the “Documents” tab and remove **act.html** as the default document. Add **wceweb.dll** in its place and click OK.
  - a. If updating a WiredContact PocketPC site, remove **actweb.dll** as the default document. Add **wceweb.dll** in its place and click OK.
8. After the site is up and running, remove (delete or rename) **actweb.dll** and **act.html** from the WiredX3 installation folder. You should also remove the **wcactsetup.dll** and the **WCSetup.exe** program. These files are no longer necessary, and if left in place may confuse your administrator or your users.
9. If you are using LeadCatcher, look through all leadcatcher templates and replace actweb.dll with wceweb.dll. Also replace instances of actweb.dll with wceweb.dll in any html files on your lead generating site(s) that may reference the WiredContact LeadCatcher.

# Chapter 1: Overview

WiredContact Enterprise x3 is an upgrade to WiredContact x3 for ACT!. WiredContact Enterprise is a web interface for industry standard database engines and is not compatible with any version of ACT!.

The graphical interface of WiredContact Enterprise uses the same template set as WiredContact x3. Customizations made in WiredContact x3 for ACT! will be preserved when installing WiredContact Enterprise.

## Database Compatibility

Before continuing you should have a database available. Some database platforms require a separate installation.. You can opt to use any of the following database platforms:

### Desktop Database Types

- Microsoft Access (You do not need to have Access installed on the server)

### Server Database Types

- Microsoft SQL Server
- Microsoft SQL Server Express
- Other databases, such as Oracle, Sybase or AS400 may be viable options. If you wish to use one of these database platforms, please contact WiredContact for more information.

To determine which database is most suitable for your WiredContact site, refer to the diagram in Appendix A.

WiredContact Enterprise utilizes at least two table sets (System Tables, Site Tables). The System Table set, and one Site Table Set may coexist in the same database, but WiredContact recommends storing each Table Set in a separate database.

One database can be accessed by more than one site if you wish to share the database information between the sites. Alternately, if you wish to separate the information accessible for each site, then each site would require it's own database.

If using a desktop database (such as MS Access), then the database file may be placed in the WiredContact Enterprise installation folder, or a separate folder, as long as the file/folder permissions are set appropriately.

When naming databases, tables and fields, it is strongly recommended to only use alphanumeric characters (a..z, 0..9). Spaces or other ASCII characters are strongly discouraged. WiredContact allows you to use labels for Field and Table names to present the users with friendly names for tables and fields. You may use whatever characters you wish for labels.



## Recommended System Specifications

### Server configurations:

- One server with Application (Web) Server and Database Server (or desktop database)
- One Application (Web) Server and one Database Server (desktop database not supported)
- Multiple Application (Web) Servers and one Database Server (desktop database not supported)

Please refer to Appendix B for a diagram of the different server configurations.

### Server specifications:

- Application (Web) server with Internet Information Server (IIS) 5, 6 or higher.
- Windows 2003 – need to be current with Updates
- Windows 2008
- Desktop Database or Database Server
- Server addressable from users workstations (Intranet or Internet)
- Firewall if server is addressable from the Internet. See Recommended IIS Guidelines to secure your site.

The speed of the processor on your web server and database server are key factors in determining the performance of WiredContact. For optimum performance, a web server and a database server are recommended. WiredContact will operate with less than the minimum specifications, but the end user could experience unfavorable performance.

The specifications of your web server and database server depend upon the size of your database, number of users and Internet connection speed. Multiple web servers can be running WiredContact to access one or more databases.

<b>Web Server</b>	<b>Recommended</b>	<b>Minimum</b>
<b>Processor</b>	3.0 GHz or faster Pentium or Intel Xeon	2.2 GHz Pentium IV
<b>Ram</b>	1 GB or more	1GB
<b>Hard Drive Space*</b>	100 GB or more	40 GB

<b>Database Server (optional)</b>	<b>Recommended</b>	<b>Minimum</b>
<b>Processor</b>	3.0 GHz or faster Pentium or Intel Xeon	2.2 GHz Pentium IV
<b>Ram</b>	2 GB or more	1GB
<b>Hard Drive Space*</b>	100 GB or more	10 GB or more

**User specifications:**

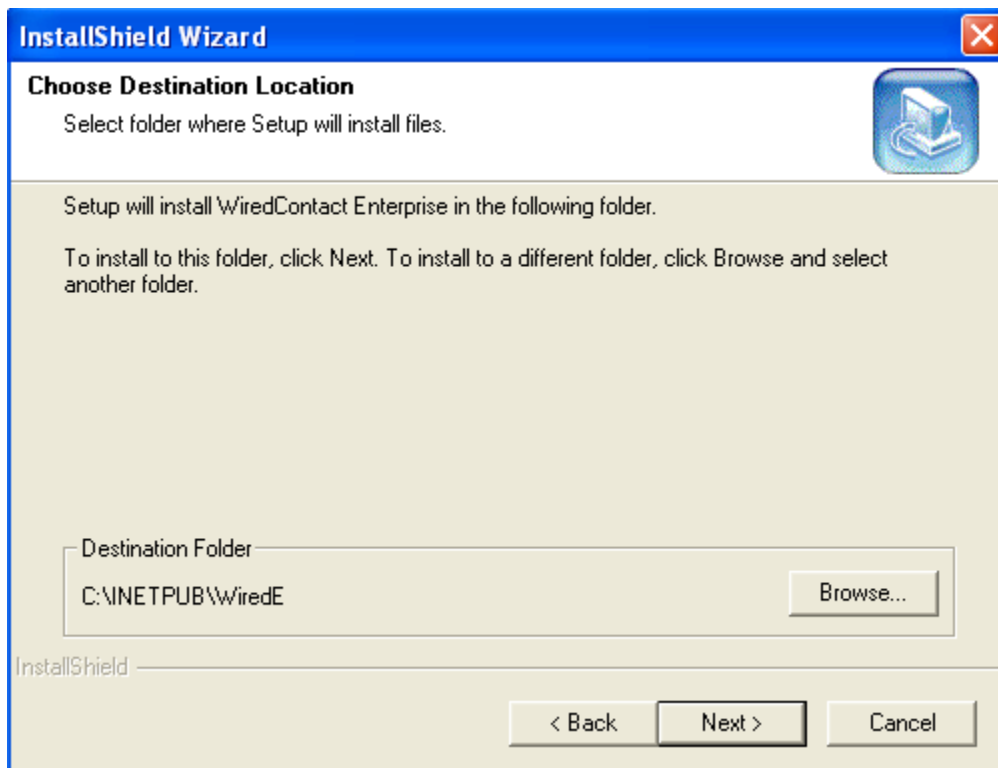
- Microsoft Internet Explorer, version 5.0 or higher (PC or MAC) or Mozilla Firefox
- Internet Connection

## Chapter 2: Installing WiredContact Enterprise (WCE)

### Step 1: Install the Software

Download the latest version of WiredContact Enterprise from [www.wiredcontact.com/wcedisclaimer.html](http://www.wiredcontact.com/wcedisclaimer.html) Choose the WCE x3 (Upgrade from WCA) option.

1. Unzip **wiredenterprisex3.zip** and run Setup.exe (This will install the latest version of WiredContact Enterprise to the program folder C:\inetpub\WiredE.)
2. Accept all of the install defaults



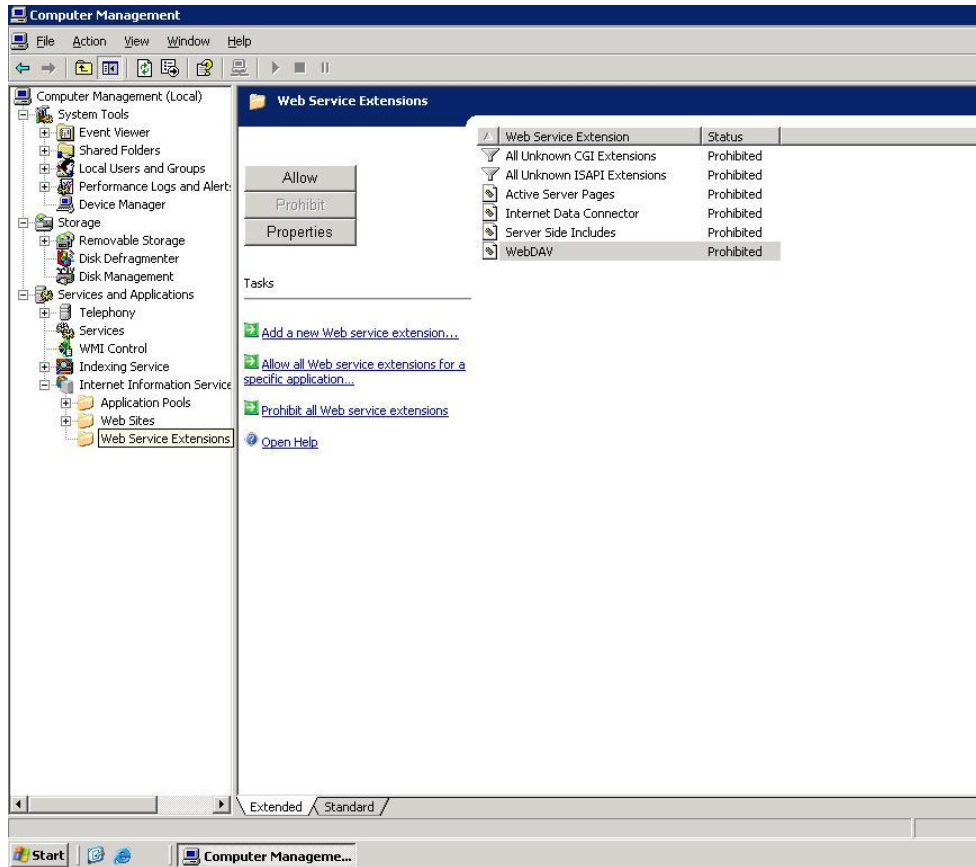
## Step 2: Set up the Website in IIS

1. Right mouse click on "My Computer". Click Manage. Expand Services and Applications. Expand Internet Information Services.
2. Create a new Application Pool.
3. Add a new virtual Directory to the Default Web Site for the new site. Check Run and Execute.
4. Right click new virtual directory - properties. Uncheck Log Visits, Index this site. Change Application Pool to one created above.
5. Click the Documents tab, remove all, add wceweb.dll.
6. Click Directory Security tab, Edit button, Uncheck Windows Integrated Authentication.

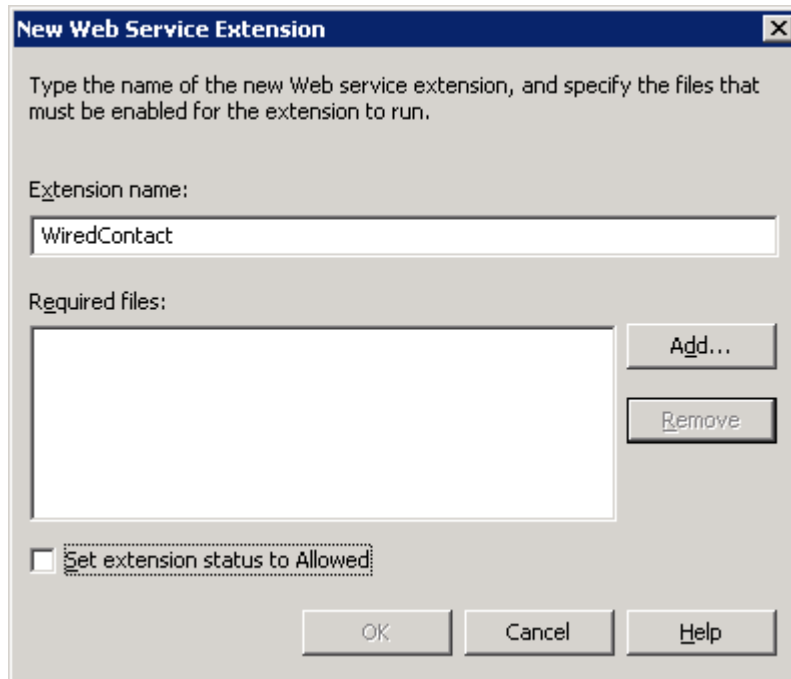
## Using Windows 2003 Server

Running Windows 2003 Server requires that you enable web extensions for the WiredContact .dll files.

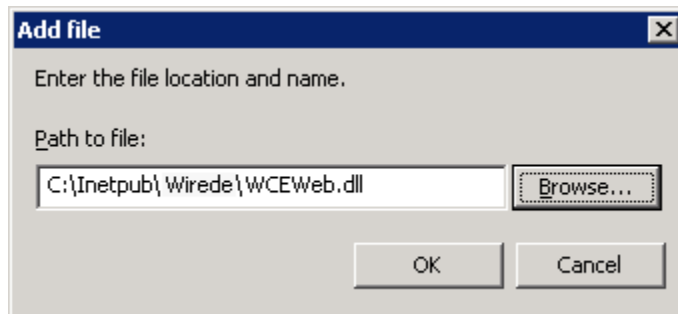
1. In the *Computer Management* screen, locate Internet Information Services.
2. Navigate to a sub-folder called *Web Service Extensions*
3. Select *Add a new Web service extension*



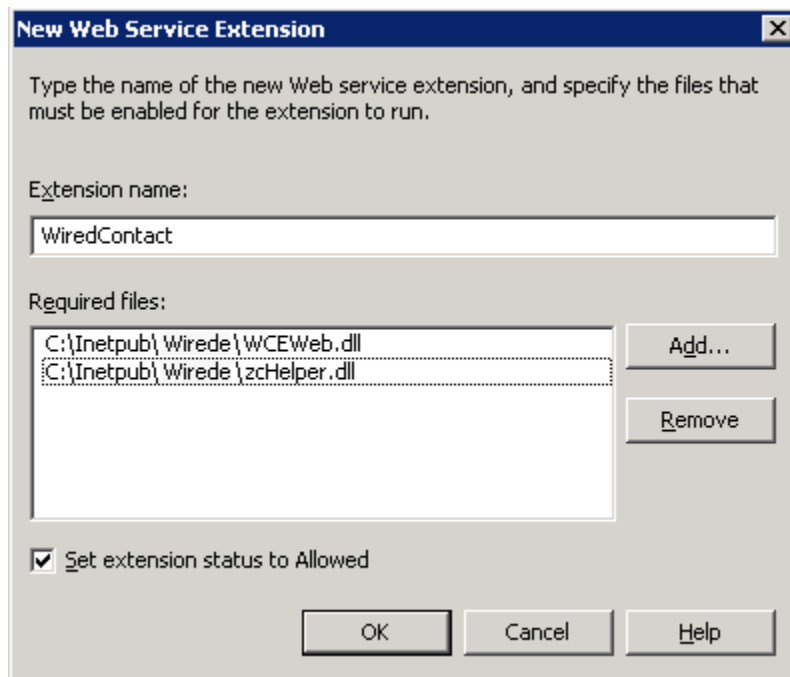
4. Enter WiredContact as the Extension name.



5. Select the *Add* button.



6. Individually add **WCEWeb.dll** and **zcHelper.dll**.
7. Point each extension to the WiredContact install folder.  
(for example - C:\Inetpub\Wirede\WCEWeb.dll)
8. Select *Set Extension Status To Allowed* for each file.



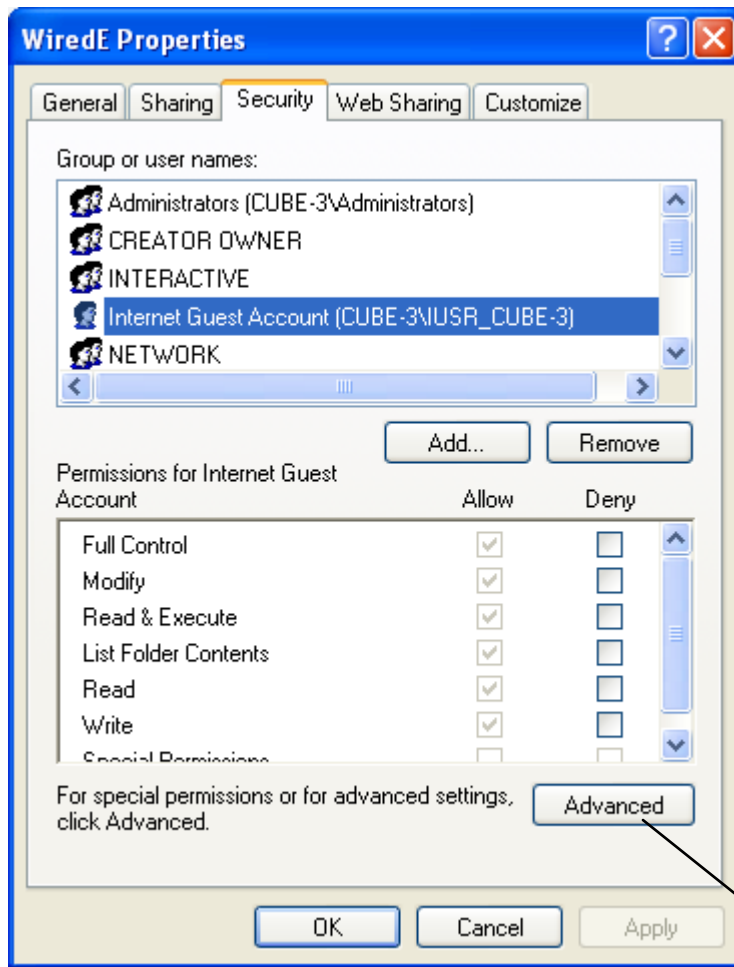
## **Using Windows 2008**

See separate documentation at [http://www.wiredcontact.com/support\\_documentation.htm](http://www.wiredcontact.com/support_documentation.htm)

### **Step 3: Configure IIS**

It is necessary to enable the IUSR\_ security permissions for the WiredContact installation folder and database folder.

1. Navigate to the WiredContact installation folder. (C:\inetpub\Wired)
2. Right-click on the folder and select Properties.
3. Select the Security tab.
  - a. Add the IUSR\_ account
  - b. Give the IUSR\_ Full Control
4. Select the Advanced button.
  - a. Check the box to Replace Permission Entries On All Child Objects
5. Repeat these steps with the database folder if different than the WiredContact installation folder.



- Inherit from parent the permission entries that apply to child objects. Include these with entries explicitly defined here.
- Replace permission entries on all child objects with entries shown here that apply to child objects



## Step 4: Install the WiredContact Service

The **WiredContact Service Application** needs to be installed to complete the installation. It is important to ensure that the WiredContact Service Application is installed from your WiredContact Enterprise folder:

1. Stop the WiredContact Service Application that is currently installed. View the Properties of the WiredContact Service Application to see where it is installed from. Close the Computer Management window.
2. Uninstall the existing WiredContact Service Application by using the file called ***Uninstall WiredContact Service.bat*** from the folder noted in step 1 (above).
3. Install the WiredContact Service Application from the WiredContact Enterprise folder by using the file called ***Install WiredContact Service.bat*** in the WiredContact Enterprise install folder.
4. Open the Computer Management Screen and start the new WiredContact Service Application. It is recommended that you use the same user for the WiredContact Service Application as the WiredContact virtual directory. This will minimize security issues that may arise between the two applications.

## Chapter 3: Accessing the WiredContact Enterprise Administration Console

### Overview

The administration of WiredContact Enterprise is managed through a web browser with the Admin Console.

To access the WiredContact Enterprise Admin Console, open a web browser on the server and navigate to your WiredContact Enterprise site (default location: <http://localhost/wired>). Click on the **Admin** link that is displayed in the lower left hand corner of your screen (bottom of side bar). If you do not see the Admin link, make sure that you're using localhost as the server name to navigate to the WiredContact site. If you're unable to use localhost, contact WiredContact support ([support@wiredcontact.com](mailto:support@wiredcontact.com)) for additional assistance.

When you click on the Admin link, a menu will display with several links on the left hand side of the screen to access different functions:


- System Settings
- Site Settings
- User Settings
- Database Aliases
- Admin Security

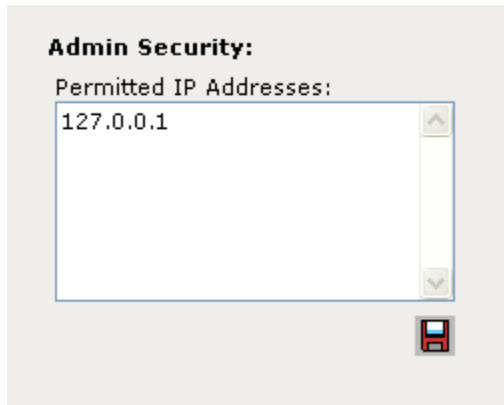
The following chapters will cover each of the functions listed above.

### Giving Admin Access to other People

The Administrative Console is accessible on the server where Enterprise is installed. (Users will not see the Admin link on their views).

You can also administer WCE from remote workstations. This can be completed in one of two ways. (**Note** – do not setup remote administration until after you have successfully setup the WiredContact System and Site settings)

1. **Permitted IP Address:** Enable permitted IP addresses by clicking on the **Admin Security** menu option. Enter the permitted IP addresses into the dialog window and click the **Save**  icon when finished.



2. **Admin UID/PW** – Enable an Admin user ID and password by clicking the **Site Settings** menu option. Click on **Misc. Settings** and then **Security Settings**.
  - a. Check the box that reads **Allow Admin Login**.
  - b. Enter a user ID and password.
  - c. Click the **Save** link to set the UID/PW information.



## Chapter 4: Configuring the System Settings

### Overview

It is necessary to set up a method for the server to “talk” to or communicate with the database. The setup procedures are generally different for each database type. Also, desktop database types (MS Access) utilize files while server types (MS SQL Server, SQL Server Express, MySQL) use servers and databases.

A database alias is a collection of elements that create a database connection. WiredContact requires a System Alias that had all the necessary information to communicate with the System database. The single System Alias is used for all WiredContact sites on a single server. Each site would also have a Site Alias that had all the necessary information to communicate with the site database.

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**NOTE:** For Application (Web) servers running Windows 2000, download the latest **MDAC version** from the Microsoft web site. For Windows 2003 and XP operating systems, make sure the Server is current with Updates.

---

### Setting up a System Alias

Click the menu link called **System Settings**:

**System Alias** – Enter a name in the **System Alias** field (i.e. WC\_Enterprise), and select the Alias Type from the dropdown menu and click the Save icon.

This alias name represents the database that will control all WiredContact Enterprise system settings, including email server information, license information, user information, etc. The database associated with this alias should be unique for the system and not used with any site databases. Any name is suitable for this alias. It is strongly recommended not to change any alias name once it has been setup and configured. End users do not see alias names.

After you click the Save icon, you will get additional icons to help you select a file (for a desktop database) or a database (for a server database).

---

**NOTE:** You may receive error messages indicating that the Alias setup is in error or incomplete until all of the appropriate settings are correct.

---

For a **Microsoft Access** database, use the instructions in the section below called [Using MS ACCESS \(Desktop Database Types\)](#).

For **MS SQL Server, MySQL or SQL Server Express**, please skip to the section called [Using MS SQL Server, SQL Server Express, MySQL \(Server Database Types\)](#).

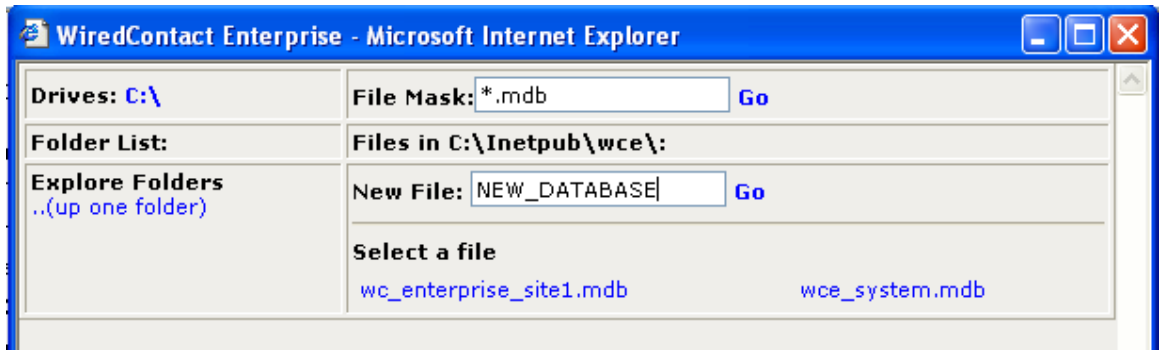
## Using MS ACCESS (Desktop Database Types)

MS Access is a file driven database engine. Therefore you will need to point the configuration to a specific file and log in as necessary. Fill in the following fields as described below.

**Server** – Leave this field blank for MS Access databases.

**Database** – Use the folder icon to select an existing database or create a new one. You may also type the physical path to the database here.

To select or create a new MS Access file, click on the folder icon and a separate window will open. On the left hand side of the window, navigate to the physical folder location where the new database will be located. This will populate the path to the folder on the right hand side. Select an existing database on the right hand side, or type in a new database name in the field called New File and click the Go button. **Do not use spaces when naming databases.**



**WiredContact Enterprise System Settings**

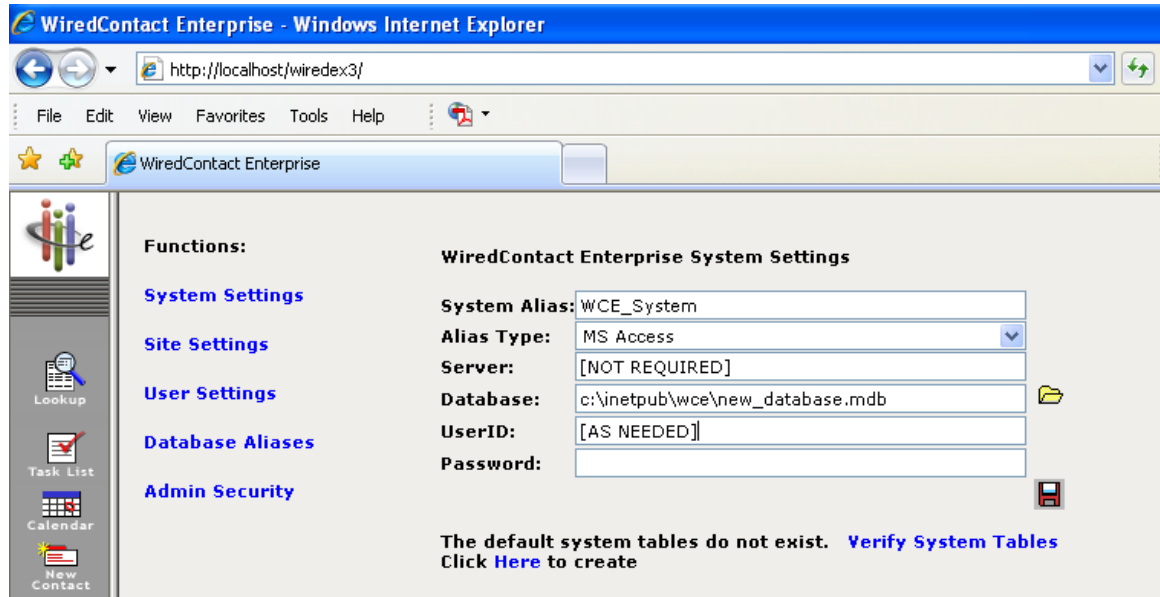
System Alias:	WCE_System
Alias Type:	MS Access
Server:	[NOT REQUIRED]
Database:	c:\inetpub\wce\new_database.mdb
UserID:	[AS NEEDED]
Password:	

The default system tables do not exist. [Verify System Tables](#)  
Click [Here](#) to create

**UserID** – Fill this in if your MS Access database has a username and password set. MS Access does not require a username/password in the default installation. If you have installed

MS Access on your server, and have setup MS Access to use a userid/password, then you'll need the UserID here. Otherwise, leave this field blank. If you are unsure whether you need a UserID or not, press the save button. If you need a userid/password, you will see an error message under the alias settings indicating the problem with the alias.

**Password** – Fill this in if your MS Access database has a username and password set. MS Access does not require a username/password in the default installation. See above for more information.



Once the above settings are filled out, click the Save  icon.

Next, skip to the section called **Creating System Tables – All Database Types** to continue with the configuration.

## Server Database Types: MS SQL Server, SQL Server Express

MS SQL Server, MDSE and MySQL are server based database engines.

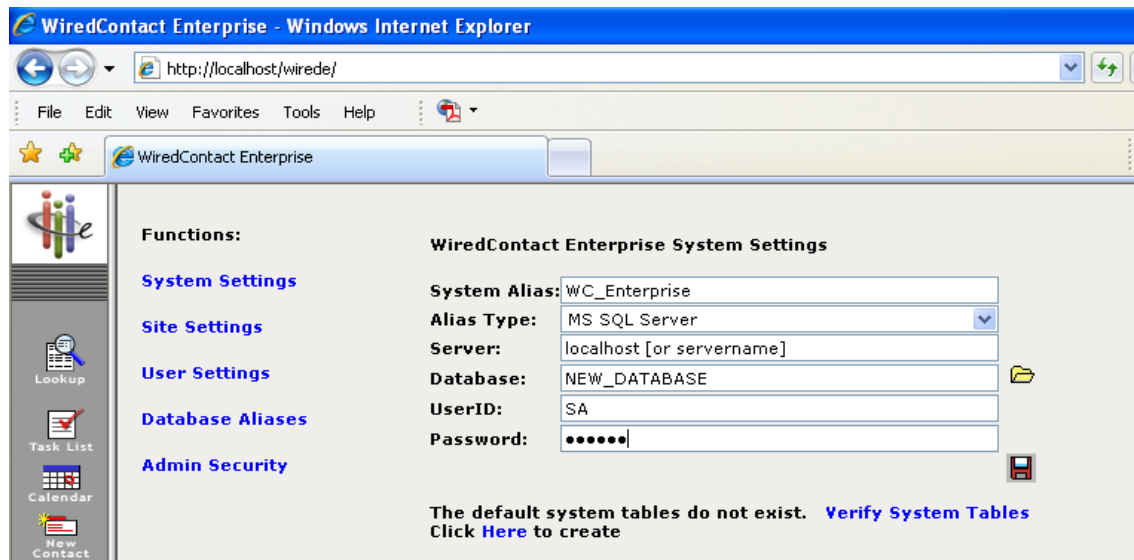
**Server** – Set this to the server where your database server resides. Consult your database server documentation for more information.

**Database** – Type in the name of the database on the server specified above. To view a listing of the databases located on the server specified above, click on the *Folder* icon to view them.

**UserID** – The UserID entered here must have access to the server database and tables specified above. If you have not defined users for your server database, use the default administrator userid/password as follows:

- The default login for MS SQL Server is *sa*.
- The default login for MySQL is *root*.

**Password** – Fill in the password for the above UserID.



The screenshot shows the 'WiredContact Enterprise System Settings' page in a Windows Internet Explorer browser. The address bar shows 'http://localhost/wirede/'. The page has a navigation menu on the left with icons for 'Lookup', 'Task List', 'Calendar', and 'New Contact'. The main content area is titled 'WiredContact Enterprise System Settings' and contains several input fields: 'System Alias' (WC\_Enterprise), 'Alias Type' (MS SQL Server), 'Server' (localhost [or servername]), 'Database' (NEW\_DATABASE), 'UserID' (SA), and 'Password' (masked with dots). A 'Save' icon is visible at the bottom right of the form. Below the form, a message states: 'The default system tables do not exist. Verify System Tables Click Here to create'.

Once the above settings are filled out, click the Save  icon.

Next, continue to the section called **Creating System Tables – All Database Types** to continue with the configuration.

## Creating System Tables – All Database Types

After the system database alias is created and correct (no errors), a message will display – “*The default system tables do not exist. Click [Here to create](#)”*. Click the link and WiredContact Enterprise will create the necessary system tables. Once the default tables are created, you should see the listing of the System Tables displayed and additional configuration options.

The [Verify System Tables](#) link will confirm that all of the appropriate system tables exist. If a system table was accidentally deleted, this link will re-create the missing tables.



Once the system table list is displayed, continue with the configuration of email server settings.

## Email Server Settings

In order for users to send emails, SMTP server information needs to be entered. WiredContact Enterprise uses an SMTP Relay, so your SMTP server will need to be configured to allow relays from the WiredContact server.

There is a link at the bottom of the page called **Email Server**. Click this link and fill in the fields as described below.

**Email Server** – Enter the SMTP server address here. Again, this server must allow SMTP relays.

**UserID** - Enter an SMTP account name that allows relays.

**Password** - Enter the appropriate password for the above account.

**Port Number** – The SMTP Port Number is the port that your SMTP engine communicates over. The default port for SMTP is 25. If your server requires an alternate port number, enter it here.

**Message Delay** – (Mass Email Setting) The Message Delay setting is the minimum amount of time (in milliseconds) that the mass email engine will pause between emails. The actual delay may be longer depending on how long it takes to construct the email. Email messages with HTML



formatting take longer to construct. The default value is 500 milliseconds, which is a delay of one-half of a second.

**Pause Count** – (Mass Email Setting) Pause Count should be used if your ISP blocks email in an attempt to block SPAM. The setting causes the WiredContact mass email engine to pause after sending a specified number of emails so that ISP sending limits are not exceeded. This setting should be used in conjunction with the *Pause Delay*.


**Pause Delay** – (Mass Email Setting) Pause Delay should be used in conjunction with *Pause Count* to specify the amount of time that the WiredContact mass email engine will pause before sending additional emails.

**Default Admin Address** - Enter in the default WiredContact Enterprise administrator's email address. This will be used for certain admin functions later.

Once you have entered in the necessary fields, click the *Save* icon. After the information is saved, click the checkmark icon next to the *Default Admin Address*. Clicking this checkmark will send a test email to the admin to verify that the email settings are working.

**WiredContact Enterprise System Settings, Email Server**

<b>Email Server:</b>	<input type="text" value="email.server.com"/>
<b>UserID:</b>	<input type="text" value="relay-user"/>
<b>Password:</b>	<input type="password" value="••••••••"/>
<b>Port Number:</b>	<input type="text" value="[NOT REQUIRED]"/>
<b>Message Delay:</b>	<input type="text" value="[NOT REQUIRED]"/>
<b>Pause Count:</b>	<input type="text" value="[NOT REQUIRED]"/>
<b>Pause Delay:</b>	<input type="text" value="[NOT REQUIRED]"/>
<b>Default Admin Address</b>	<input type="text" value="tom@wiredcontact.com"/> ✓



Once you have confirmed your email settings, continue with the configuration of license information.

## License Information

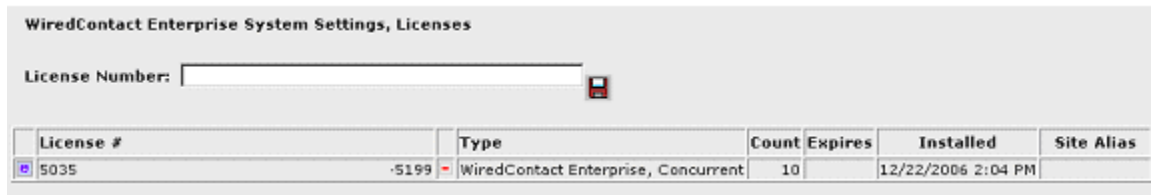
Click the link at the bottom of the page called *License Information*. Enter a valid WiredContact Enterprise license number. If you need one, please send a request to: [info@wiredcontact.com](mailto:info@wiredcontact.com) for a prompt reply. After the license key has been entered, click the Save icon.

---

**NOTE:** When entering a WiredContact Enterprise evaluation license, delete any expired license keys using the “Delete” icon to ensure proper evaluation license activation.

---

The WiredContact software will translate your license key and the license description will be automatically filled in as pictured below.



License #	Type	Count	Expires	Installed	Site Alias
5035	-5199 - WiredContact Enterprise, Concurrent	10		12/22/2006 2:04 PM	

## Other Server Settings

There is also a link at the bottom of the page called **Other Server Settings**. This link provides information about:

**WiredContact Service Request Queue** – The path listed here is a default setting. For information on how to change the path, please send an email to [support@wiredcontact.com](mailto:support@wiredcontact.com).

**Host Multiple Companies on this Server** – This function is only used by hosting partners and is not needed with a standard installation. Please send an email to [support@wiredcontact.com](mailto:support@wiredcontact.com) for additional information about using this function. **You do not need to use this option if you have multiple sites and/or databases.**

## Chapter 5: Configuring the Site Settings

### Overview

The set up procedures for configuring a site are slightly different for Desktop database types (MS Access) and Server database types (MS SQL Server, SQL Server Express, MySQL). After you configure a Site default alias, refer to the respective section below depending upon the database type you have selected.

### Configuring a Site Default Alias

In order to configure a Site default alias, click the **Site Settings** link.

**Site Default Alias** – Enter a name in the Site Default Alias field (i.e. WCE\_Site1) select the Alias Type from the dropdown menu and click the *Save* icon.

This alias name represents the database that will house all of the data for this WiredContact site. Any name is suitable for this alias. It is strongly recommended not to change any alias name once it has been setup and configured. End users do not see alias names. If you plan on using two or more sites and a single database, then each site that uses the database should use the same alias name.

After you click the *Save* icon, you will get additional icons to help you select a file (for a desktop database) or a database (for a server database).

---

**NOTE:** *You may receive error messages indicating that the Alias setup is in error or incomplete until all of the appropriate settings are correct.*

---

## **Desktop Database Types: MS Access**

**Server** – Leave this field blank for MS Access databases.

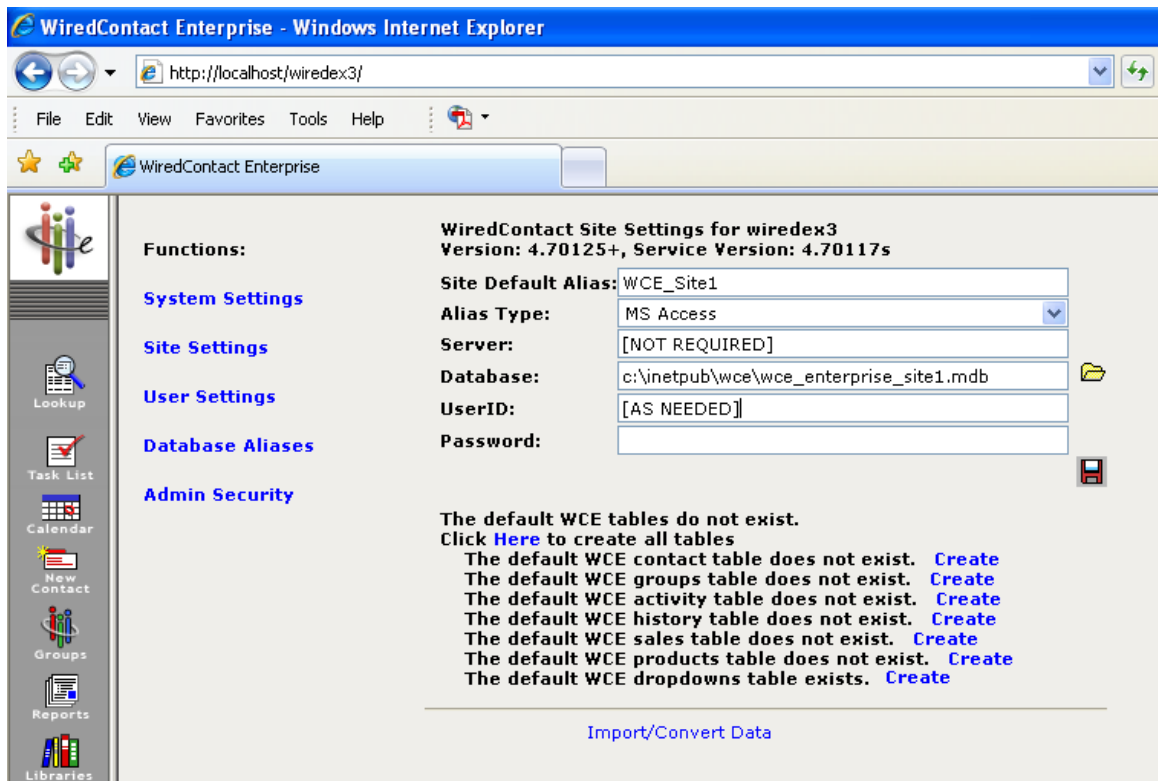
**Database** – – Use the folder icon to select an existing database or create a new one. You may also type the physical path to the database here.

To select or create a new MS Access file, click on the folder icon and a separate window will open. On the left hand side of the window, navigate to the physical folder location where the new database will be located. This will populate the path to the folder on the right hand side. Select an existing database on the right hand side, or type in a new database name in the field called New File and click the Go button. **Do not use spaces when naming databases.**

The database created should be unique for a specific WiredContact site and should not be the same as the System database. If you are using the database for multiple sites, each site using the same database should use the same alias name.

**UserID** – Fill this in if your MS Access database has a username and password set. MS Access does not require a username/password in the default installation. If you have installed MS Access on your server, and have setup MS Access to use a userid/password, then you'll need the UserID here. Otherwise, leave this field blank. If you are unsure whether you need a UserID or not, press the save button. If you need a userid/password, you will see an error message under the alias settings indicating the problem with the alias.

**Password** – Fill this in if your MS Access database has a username and password set. MS Access does not require a username/password in the default installation. See above for more information..



Once the above settings are filled out, click the **Save** icon.

Next, skip to the section called **Site Tables – All Database Types** to continue with the configuration.

## Server Database Types: MS SQL, SQL Server Express

MS SQL Server and MS SQL Server Express re server based database engines.

**Server** – Set this to the server where your database server resides. Consult your database server documentation for more information.

**Database** – Type in the name of the database on the server specified above. To view a listing of the databases located on the server specified above, click on the *Folder* icon to view them.

**UserID** – The UserID entered here must have access to the server database and tables specified above. If you have not defined users for your server database, use the default administrator userid/password as follows:

- The default login for MS SQL Server is sa.

**Password** – Fill in the password for the above UserID.

WiredContact Enterprise - Windows Internet Explorer

http://localhost/wiredex3/

File Edit View Favorites Tools Help

WiredContact Enterprise

**Functions:**

- System Settings
- Site Settings
- User Settings
- Database Aliases
- Admin Security

**WiredContact Site Settings for wiredex3**  
Version: 4.70125+, Service Version: 4.70117s

Site Default Alias: WCE\_Site1

Alias Type: MS SQL Server

Server: localhost [or server name]

Database: WC\_Enterprise\_Site1

UserID: SA

Password: .....

The default WCE tables do not exist.  
Click [Here](#) to create all tables

- The default WCE contact table does not exist. [Create](#)
- The default WCE groups table does not exist. [Create](#)
- The default WCE activity table does not exist. [Create](#)
- The default WCE history table does not exist. [Create](#)
- The default WCE sales table does not exist. [Create](#)
- The default WCE products table does not exist. [Create](#)
- The default WCE dropdowns table exists. [Create](#)

[Import/Convert Data](#)

Once the above settings are filled out, click the Save  icon.

Next, continue to the section called **Site Tables – All Database Types** to continue with the configuration.

## Site Tables – All Database Types

### Database Import

There are several ways to import data into WiredContact Enterprise. Click the **Import / Convert Data** link. A menu will display with options.



### Converting ACT! Database

There is an easy to use database migration link that will convert your ACT! 5.0+ or ACT! 6.0+ database for use with WiredContact Enterprise. The process of converting an ACT! database will create the site tables automatically if they have not been created already. The preferred method is to let the ACT! database conversion tool create the tables.

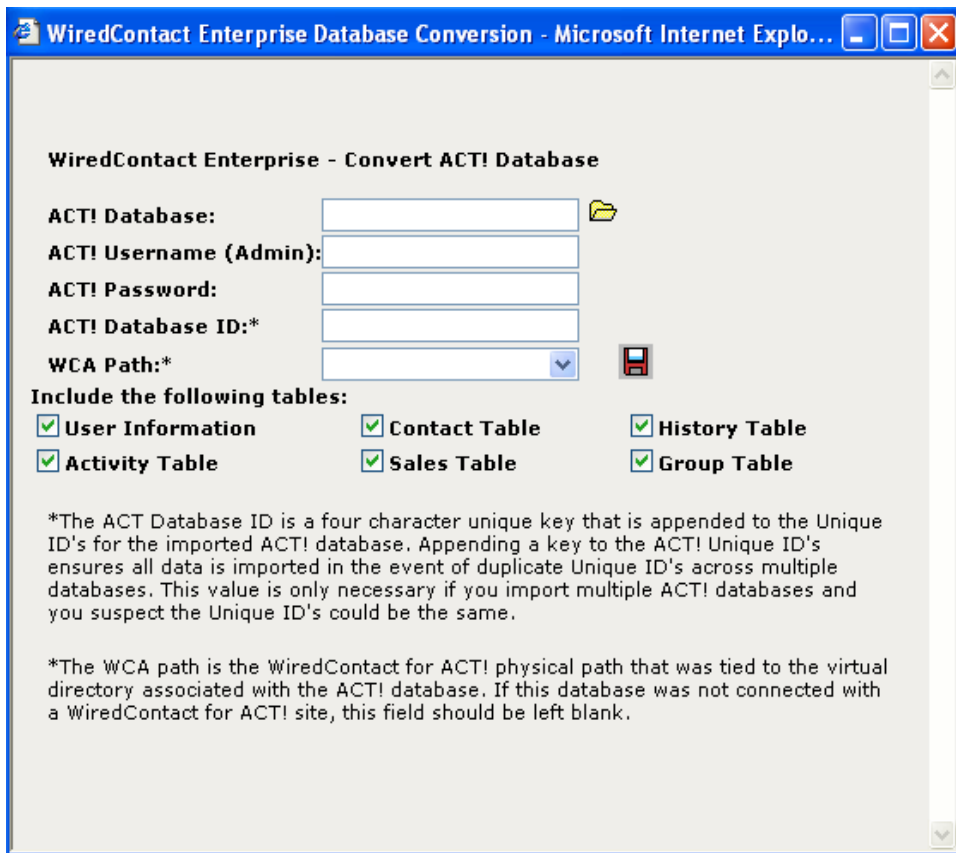
Before beginning the conversion process, ensure that any Scheduled Tasks (i.e. Windows Scheduler) that Stop/Start the WiredContact Service Application are disabled. Stopping and restarting the Service Application will cause the conversion process to restart from the beginning.

---

**NOTE:** *ACT! databases with more fields than your database can support cannot be converted at this time using this utility. Consult your database documentation to determine the maximum number of fields in a table. Please consult [support@wiredcontact.com](mailto:support@wiredcontact.com) for more information.*

---

Click the **Convert ACT! Database** link. A separate window will open.



**ACT! Database** – Click the folder icon and browse to the location of the ACT! database to be converted. If the database being converted was previously associated with a WiredContact for ACT! site, the **WCA Path** field will be populated automatically with the physical path for the prior WCA site. If the database was not previously associated with a prior WiredContact for ACT! site, the **WCA Path** field should be left blank.


**ACT! Username (Admin)** – Enter the username of an admin user of the ACT! database to be converted here.

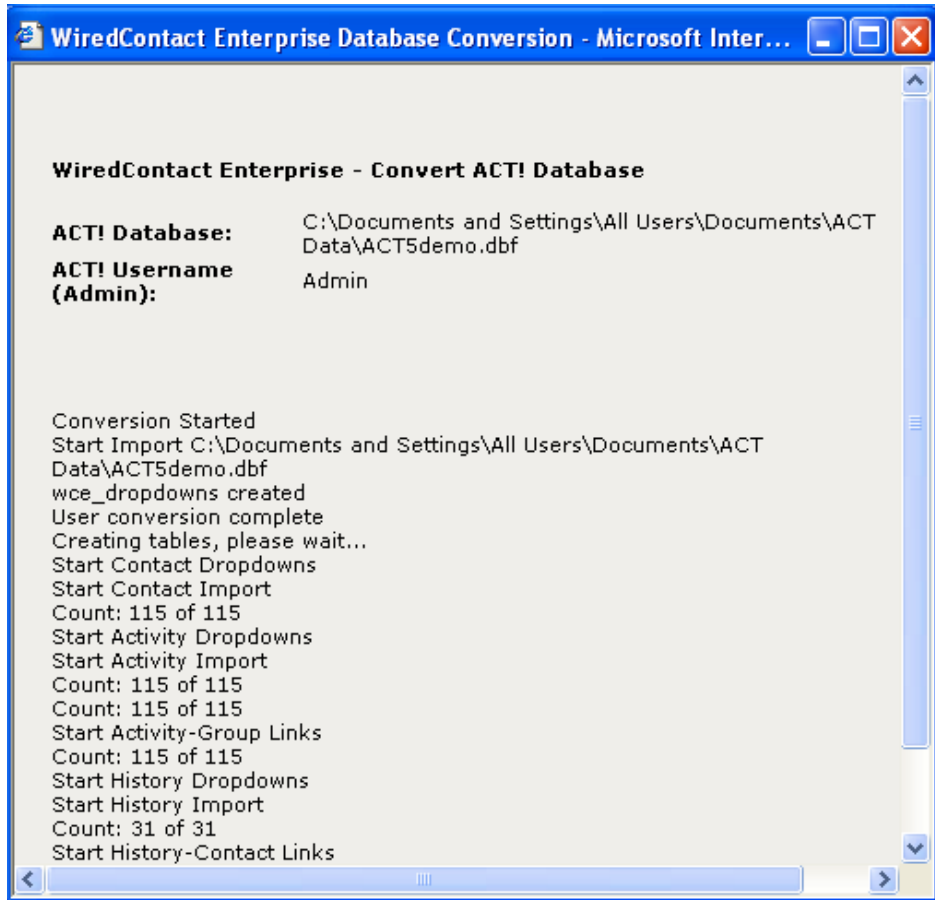
**ACT! Password** – Enter the password for the username entered above.

**ACT! Database ID** – (Only required when importing multiple Synced ACT! databases) The ACT! Database ID is a four character unique key that is appended to the Unique ID's for the imported ACT! database. Appending a key to the ACT! Unique ID's ensures that all data is imported in the event of duplicate Unique ID's across multiple databases. This value is only necessary if you import multiple ACT! databases into WiredContact Enterprise and you suspect that the Unique ID's could be the same.

**WCA Path** – The WCA path is the WiredContact for ACT! physical path that was tied to the virtual directory associated with the ACT! database. If this database was not connected with a WiredContact for ACT! site, this field should be left blank. When this field has an appropriate value, all old WiredContact for ACT! settings are translated to the WCE site.



After the appropriate fields have been filled in, click the Save  icon and the database conversion will begin. The screen will refresh on a regular basis and will display the status of the conversion. An example conversion in process is pictured below.



The length of time that it will take to convert the ACT! database is directly related to the size of the ACT! database being converted, and the specifications of the server where the conversion is taking place. The larger the database, the longer it will take to convert.

The database conversion also retains all user security information originally specified in WiredContact for ACT!, including field level security profiles. (If the WCA path has an appropriate value)

Once the conversion process is complete, the screen will refresh to the original conversion entry screen and is ready to convert another database, if necessary. Follow the steps above for each additional database to be converted.

## Importing Text or .CSV Files

There is an easy to use text import utility that will map .txt files and .csv files into the database fields with many additional options. To access the text import utility, click the **Import Text Data** link from the **Import / Convert Data** menu. A separate window will open.

**WiredContact Enterprise - Import Utility**  
Version: 4.70127+, Service Version: 4.70127s

1. **Import Map:** [dropdown] (optional)

2. **Default Record Manager:** [dropdown] (Required)

3. **Import File:** C:\Temp\ImportFile. [Browse...]

4. **First Row Labels:** [dropdown] (optional)

5. **Delimiter:** [dropdown] +

6. **Default Country Code:** +1 **Ignore Dups:**

7. **Primary table** [dropdown] Entity [dropdown]

**Additional table** [dropdown] SubEntity [dropdown] (optional)

**Additional table** [dropdown] SubEntity [dropdown] (optional)

**Import Map (optional)** – Once an import map is saved, you can select an existing map from this dropdown menu. If an Import Map is selected, press the Next button to populate the values for the import map. To save an Import Map, specify the import map file name just prior to clicking on the “Import” button (last step). If you use an import map, use a new file name or clear the file name just prior to pressing the Import button to ensure that the settings used for the import are the settings visible in one the screen. Instructions are included in the relevant area below.

**Import File** – To select a .txt or .csv file, click on the “Browse” option and choose the file to be imported.

**First Row Labels (optional)** – Choose “yes” if your document contains column headers or first row labels.

**Delimiter** – Choose the delimiter option from your data source. For a delimiter that does not appear in the dropdown menu, use the plus sign to add it.

**Default Record Manager (required)** – Choose a default record manager for the import. The default record manager will be used for the records being imported unless you choose to override it (additional steps described below).

**Default Country Code** – The default option is (+1) for the United States. Change the country code to match the default country code for the data that you are importing.

**Primary Table** – The default option is wce\_contact (the contact table), which is an entity table. Use the default option for importing contact records. For imports to other tables, the primary table should be an entity table, such as wce\_groups.

**Additional Table** – Specify additional tables used for the import here. Ensure that the type of table is also specified in the neighboring field. (i.e SubEntity. Simple SubEntity, etc.) Examples of additional tables include the wce\_activity table, which can be used to create an activity for each record imported or the wce\_history table, which can be used to create a history item for each record imported.

Click the “**Next**” button to proceed. The window will refresh with additional import options.

Import Field	Key	Field	Example Data	Example Data	Example Data
Field1	<input type="checkbox"/>	Company	Adirondack Leasing Associ	All Around Lawns	Aussie Meats
Field2	<input type="checkbox"/>	Contact	Gerald G. Oestreich	Clay Caperton	Laura Gardias
Field3	<input type="checkbox"/>	Address 1	7893 Walnut Ave.	25 Chestnut Street	644 Chapel Street
Field4	<input type="checkbox"/>			Suite 600	
Field5	<input type="checkbox"/>				
Field6	<input type="checkbox"/>		Philadelphia	San Diego	South Yarra
Field7	<input type="checkbox"/>		PA	CA	
Field8	<input type="checkbox"/>		19130	94088	VIC 3142

**Import Map** – Complete this field with a name to save your current import settings as a map for future imports. The saved map will appear in the “Import Map” dropdown box for the next import.

**Import File, First Row Labels, Delimiter, Default Record Manager, Primary & Additional Tables** – Display the options selected from the prior steps. If any of this information needs to be changed, click the “Back” button to modify the information.

Several columns of information appear in the next area. Each column contains pertinent settings for the primary and additional tables being imported and are explained below.

**Import Field** – Displays the fields recognized for the import. If you have column headings or first row headers, they will display here. Otherwise, the fields will be named Field1, Field2, Field3, etc.

**Key** – Check this box to use one or a combination of fields to check for duplicate entries. A duplicate entry is determined when all of the key fields match information existing in the database.

**Field** – Use the dropdown menus to map the data source fields to the corresponding fields in the database.

**Example Data** – These columns provide snapshots of information from the data source to help easily identify which database fields should be used for the import.

The next area (not pictured) enables the setting of default field values for the primary and additional tables specified at the beginning of the import process. The default field values will be added to the database during the import. All field names are listed here, beginning with the primary table and followed by any additional tables.

You can use the default field values with additional tables as follows:

- **wce\_activity table** – to schedule activities for the records being imported
- **wce\_history table** – to record a history item for the records being imported

Click the “Import” button to begin the import process. The window will refresh on a regular basis and will display the status of the import. Once the import process is complete, the window will refresh to the original import screen and is ready to import additional information, if necessary. Follow the steps above for each additional data source being imported.

## Importing Databases

There is also a database import utility that will convert one database type to another for use in WiredContact Enterprise. To access the database import utility, click the **Import Data From Database** link from the **Import / Convert Data** menu. A separate window will open.

**WiredContact Enterprise - Import Utility** Next  
Version: 4.70117+, Service Version: 4.70117s

---

**1. Import Map:**  (optional)

**2. Default Record Manager:**  (Required)

---

**3. Data Description: (Required)**

**Alias Name:**

**Alias Type:**

**Server:**

**Database:**

**UserID:**

**Password:**

**Database Status:** Database not configured [Hide](#)

---

**4. User Map Data (Optional):**

**Alias Name:**

**Alias Type:**

**Server:**

**Database:**

**UserID:**

**Password:**

**Database Status:** [Hide](#)

---

**5. Default Country Code:**

**6. Primary table**  Entity

**Additional table**   (optional)

**Additional table**   (optional)

**Import Map (optional)** Once an import map is saved, you can select an existing map from this dropdown menu. If an Import Map is selected, press the Next button to populate the values for the import map. To save an Import Map, specify the import map file name just prior to clicking on the "Import" button (last step). If you use an import map, use a new file name or clear the file name just prior to pressing the Import button to ensure that the settings used for the import are the settings visible in one the screen. Instructions are included in the relevant area below.

**Default Record Manager (required)** – Choose a default record manager for the import. The default record manager will be used for the records being imported unless you choose to override it for additional steps described below.

**Data Description (required)** – The Data Description area specifies information from the database to be converted.

- **Alias Name** – (Not required) If an existing alias is already defined, enter it here and click the Save icon to populate the rest of the database information. Otherwise, leave blank.
- **Alias Type** – Select a database type. Press the Save icon to see the folder helper icon next to Database.
- **Server** – This information is not necessary for MS Access
- **Database** – Type in or select the appropriate database value.
- **UserID** – The UserID entered here must have access to the database specified above. If you have not defined users for your server database, use the default administrator userid/password as follows:
  - The default login for MS SQL Server is *sa*.
  - The default login for MySQL is *root*.
- **Password** – Fill in the appropriate password for the above UserID.
- **Database Status** – Shows the current configuration status of the database to be converted. This status will change as you progress through the import process.

**User Map (optional)** – This area enables the mapping of UserIDs from a data source to values in WiredContact Enterprise. A user map can match the UniqueID from a user in the data import (examples: “John Smith”, “jsmith”, “w3i19di43kxjskr9”) to the UniqueID for the same user in WiredContact Enterprise.

The user map can be created in a simple Microsoft Access database that should contain the following information:

1. A table name matching the WCE User table (wces\_users)
2. A column (named wce\_uid) with the username as it appears in WiredContact Enterprise.
3. A column (named uniqueid) with the Unique ID of the user from the database to be imported. (examples: “John Smith”, “jsmith”, “w3i19di43kxjskr9”)

If a user map is not used, the default record manager will be used for all information being imported.

<b>4. User Map Data (Optional):</b>	<b>Alias Name:</b>	<input type="text" value="WCE_Users"/>
	<b>Alias Type:</b>	<input type="text" value="MS Access"/> ▼
	<b>Server:</b>	<input type="text" value="localhost"/>
	<b>Database:</b>	<input type="text" value="WCE_Users"/>
	<b>UserID:</b>	<input type="text" value="[as needed]"/>
	<b>Password:</b>	<input type="text"/>
	<b>Database Status:</b>	<input type="text"/>

[Hide](#)

**Default Country Code** – The default option is (+1) for the United States. Change the country code to match the default country code for the data that you are importing.

**Primary Table** – The default option is wce\_contact (the contact table), which is an entity table. Use the default option for importing contact records. For imports to other tables, the primary table should be an entity table, such as wce\_groups.

**Additional Table** – Specify additional tables used for the import here. Ensure that the type of table is also specified in the neighboring field. (i.e SubEntity, Simple SubEntity, etc.) Examples of additional tables include the wce\_activity table, which can be used to create an activity for each record imported or the wce\_history table, which can be used to create a history item for each record imported.

After the information above has been filled in, click the “**Next**” button to proceed.

The window will refresh with a **Database Status** of “**Missing SQL Property**”. Enter a SQL Statement in the area below the **Database Status** to select the information from the database to be converted.

**WiredContact Enterprise - Import Utility**  
Version: 4.70117+, Service Version: 4.70117s

**1. Import Map:** [Dropdown] (optional)

**2. Default Record Manager:** Thomas Gallagher [Dropdown] (Required)

**3. Data Description: (Required)**

**Alias Name:** WCE\_Site1

**Alias Type:** MySQL [Dropdown]

**Server:** localhost

**Database:** wce\_site1

**UserID:** root

**Password:** ●●●●●●

**Database Status:** Missing SQL property

**SQL Open Command:**  
select \* from wce\_contact

Hide

After you have used a SQL statement to select the data to be converted, click “**Next**” to proceed.

The screen will refresh and a SQL count will appear in the area below. The SQL Count represents the number of rows of data from the database to be converted.

**SQL Open Command:**

```
select * from wce_contact
```

**SQL Count:** 63

Query as many or as few tables as necessary from the data source and experiment with different combinations of SQL statements here. Use “**Next**” buttons to enter a new SQL statement and view the data results below. Changing the SQL statement, or any of the database attributes, will refresh the dialog with the new information.

---

**NOTE:** For additional information about the creation and use of SQL Statements, please refer to the appropriate section in the **WiredContact Enterprise Admin Configuration Guide**.

---

The screen will refresh with additional import options.

**WiredContact Enterprise - Import Utility**  
Version: 4.70117+, Service Version: 4.70117s

---

**1. Import Map:**

**2. Default Record Manager:** Thomas Gallagher

---

**3. Data Description: (Required)**

**Alias Type:**

**Server:**

**Database:**

**UserID:**

**Password:**

**SQL Open Command:**

```
select * from wce_contact
```

**SQL Count:** 63 [Hide](#)

---

**4. User Map Data (Optional):** [Show](#)

---

**5. Default Country Code:** +1

**6. Primary table:** wce\_contact (Entity)

**Additional table:** wce\_activity (SubEntity)

**Additional table:** wce\_history (SubEntity)

**Import Map** – Complete this field with a name to save your current import settings as a map for future imports. The saved map will appear in the “Import Map” dropdown box for the next import.

**Default Record Manager, Default Country Code, Primary & Additional Tables** – Display the options selected from the prior steps. If any of this information needs to be changed, click the “Prev” button to modify the information.



Several columns of information appear in the next area. Each column contains pertinent settings for the primary and additional tables being imported and are explained below.

Import Field	Key	Database Field	Example Data	Example Data	Example Data
UNIQUEID	<input type="checkbox"/>	UNIQUEID	{-Sfaa4dcEpa	,pSfaa2dcEpa	-ORfaa6dcEpa
EDITTIME	<input type="checkbox"/>	Edit Time	1/18/2007 2:05:49 PM	1/18/2007 2:05:28 PM	1/18/2007 2:06:20 PM
CREATETIME	<input type="checkbox"/>	Create TIme	3/16/2002 11:14:12 PM	3/16/2002 11:14:10 PM	3/16/2002 11:14:14 PM
EDITUSER	<input type="checkbox"/>	Edit User	48b1w2h3ye3loqfc	48b1w2h3ye3loqfc	48b1w2h3ye3loqfc
CREATEUSER	<input type="checkbox"/>	Create User	48b1w2h3ye3loqfc	48b1w2h3ye3loqfc	48b1w2h3ye3loqfc
RECORDMANAGER	<input type="checkbox"/>	Record Manager	48b1w2h3ye3loqfc	48b1w2h3ye3loqfc	48b1w2h3ye3loqfc
RECORDOWNER	<input type="checkbox"/>	Record Owner	CH Gourmet Imports	CH Gourmet Imports	CH Gourmet Imports
MANAGINGTEAM	<input type="checkbox"/>	Managing Team			
COMPANY	<input type="checkbox"/>	Company	Circle Photography	Mercury Production Manage	T-Bone's Steakhouse
CONTACT	<input type="checkbox"/>	Contact	Jonathan Jenkins	Albert Barry	Mike Underwood
FIRSTNAME	<input type="checkbox"/>	First Name	Jonathan	Albert	Mike
LASTNAME	<input type="checkbox"/>	Last name	Jenkins	Barry	Underwood
SALUTATION	<input type="checkbox"/>	Salutation	Jonathan	Albert	Mike
TITLE	<input type="checkbox"/>	Title	Owner	Product Manager	Owner
ADDRESS1	<input type="checkbox"/>	Address	2256 Circle Lane	66 Flash Rd.	9674 Porterhouse Rd.
ADDRESS2	<input type="checkbox"/>	Address2	Suite 4	Suite 200	Building #2
ADDRESS3	<input type="checkbox"/>	Address3	MS 1	Test Address	Test Address
CITY	<input type="checkbox"/>	City	Dallas	Central City	Eugene
STATE	<input type="checkbox"/>	State	TX	CO	OR
POSTALCODE	<input type="checkbox"/>	Zip	75214	80427	97401
COUNTY	<input type="checkbox"/>	County			
COUNTRY	<input type="checkbox"/>	Country	United States	United States	United States
HOMEADDRESS1	<input type="checkbox"/>	Home Address	5517 E. Lobelia	88 W. High St.	216685 Dodge Blvd.
HOMEADDRESS2	<input type="checkbox"/>	Home Address2	#135		House #2
HEMOCITY	<input type="checkbox"/>	Home City	Richardson	Central City	Springfield
HOMESTATE	<input type="checkbox"/>	Home State	TX	CO	OR
HOMEPOSTALCODE	<input type="checkbox"/>	Home Zip			

**Import Field** – Displays the fields recognized for the import. If you have column headings or first row headers, they will display here. Otherwise, the fields will be named Field1, Field2, Field3, etc.

**Key** – Check this box to use one or a combination of fields to check for duplicate entries. A duplicate entry is determined when all of the key fields match information existing in the database.

**Field** – Use the dropdown menus to map the data source fields to the corresponding fields in the database.

**Example Data** – These columns provide snapshots of information from the data source to help easily identify which database fields should be used for the import.

The next area (not pictured) enables the setting of default field values for the primary and additional tables specified at the beginning of the import process. The default field values will be added to the database during the import. All field names are listed here, beginning with the primary table and followed by any additional tables.

You can use the default field values with additional tables as follows:

- **wce\_activity table** – to schedule activities for the records being imported
- **wce\_history table** – to record a history item for the records being imported

When you have reviewed and are satisfied with the data to be imported, click the **“Import”** button to begin the process. The window will refresh on a regular basis and will display the status of the import. Once the import process is complete, the window will refresh to the original entry screen and is ready to import another database, if necessary. Follow the steps above for each additional database to be imported.

**Please refer to the [WiredContact Enterprise x3 Admin Configuration Guide](#) for information about the exciting options available for further configuration of your new WCE site!**

# Appendix A

WiredContact Worldwide, Inc.

## WiredContact Enterprise Databases



### Microsoft SQL

#### Server

##### Requirements

MS SQL Server

CAL or Processor license(s) for users

##### Benefits

Maximum Performance

No database size limit

##### Options

Can use either SQL Management tools or

WiredContact admin tools to edit database schema

Can use standard 3<sup>rd</sup> party tools to access database directly

### MySQL

##### Requirements

Download and install from MySQL website

Experienced MySQL administrator

##### Benefits

Wide variety of open source tools

No database size limit

##### Options

Can use either MySQL Management tools or

WiredContact admin tools to edit database schema

Can use standard 3<sup>rd</sup> party tools to access database directly



### Microsoft SQL Server Express

##### Requirements

Download and install from MS website

##### Benefits

Good for larger installations

User Friendly

Can use either SQL Management tools or

WiredContact admin tools to edit database schema

##### Options

Database size limit of 4 GB

MS management tools available for database editing



### Microsoft Access

##### Requirements

None! Use WiredContact admin tools to

create and edit database schema

##### Benefits

Great for smaller installations and demo's

No additional software required

##### Options

Microsoft Access can be used to edit

database directly

Database size limit of 2 GB



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## Appendix B

